

ICT tools in rural, eco and adventure tourism

in Serbia, Montenegro, Bosnia and Herzegovina

RESEARCH SUMMARY

D-Tour project : Improving the digital skills of tourism companies in Serbia,
Bosnia and Herzegovina and Montenegro



ABOUT THE PROJECT

Small and medium-sized enterprises (SMEs) operating in the tourism industry in Serbia, Montenegro and Bosnia and Herzegovina have limited knowledge of digital platforms. Therefore, they often fail in their attempts to use digital tools to grow their business. They also often face the possibility of lagging behind other industries when it comes to business development as well as being slower to adapt to new social and economic circumstances. Taking into account the state of economy, especially in the tourism sector due to pandemic that hit us this year as well as the general level of competitiveness, SMEs in the field of tourism must not miss the opportunity to develop their digital skills, visibility and business activity online. Through this project and all planned activities, ICT Hub,

in collaboration with [Digitalizuj.me](#) from Montenegro and [JS Guru](#) from Bosnia and Herzegovina, aims to strengthen the digital awareness and expertise of tourism service providers.

Also through this project ICT Hub with its partners aims to launch the innovation potential of tourism SMEs by supporting the integration of tourism into the digital value chain and by offering a way towards expanded digital promotion and income generation.

ABOUT THE RESEARCH

Within the project, in cooperation with the research agency MASMI, research has been conducted to describe the market situation regarding the use of digital tools in micro and small enterprises in the field of eco, rural and adventure tourism in Serbia, Bosnia Herzegovina and Montenegro. The research was conducted in the first half of **September, 2020** and the sample consisted of **300 respondents** from all three countries.

Key research concepts:

- **Eco tourism** - a responsible journey in which conscious travelers support the environmental protection of the destination they have chosen, as well as the local community and its cultural heritage.
- **Rural tourism** - represents all forms of tourist services and activities that take place in rural areas.
- **Adventure tourism** - a type of tourism in which tourists engage in some adventurous activities such as parachuting, hill climbing, diving...

Key obstacles for digitalization of SMEs in tourism

Old way of doing business: reliance on proven 'analog' way of doing business:

- "word of mouth" as a way of promotion.
- Using large websites as advertisers for smaller enterprises.
- Significant presence of live communication.
- Cash payment on site or payment in advance.
- Building up rapport with guests only during conversations.

Vague understanding of digital tools benefits:

- Entrepreneurs are mainly familiar with basic social networks and are almost unaware of other more advanced tools.
- When SME representatives in tourism are presented with promotional materials of advanced tools that can attract attention, they are considered as solutions for larger and more developed companies and they stay out of focus.
- Vague understanding of digital tools benefits.
- It is a general belief that digitalization is useful. However, a clear understanding and explanation of their role are needed too.

In time, money and personnel everything might seem complex, so:

- It is rare for 2 people to do one job – they all jump in when there is time for that (promotions, reservations).
- Lack of time – Nobody has that much time to start learning new and advanced digital tools.
- There is always something that has a higher priority than starting digitalization - money is invested in current issues.
- Digitalization is considered something advanced and expensive which might pay off only for some.

Recognized needs and drivers

PROMOTION

Gaining knowledge on how to promote your own offer – how to make it stand out on the web. That is why Google tools are recognized as quite relevant and desirable. They sound familiar and proven.

PRESENTATION

Gaining knowledge on how to create your own offer.
A driver for younger, enthusiastic SMEs representatives is particularly relevant.
Tips and tricks for navigating your own promotion towards visitors and ways of increasing offer attractiveness.

TARGETING

Addressing the right target group

- First step is expanding the business, attracting visitors and getting to know them – who could be the target group?
- Knowledge of the right marketing activities for them. Which add should be presented to whom?
- How to be visible for potential guests from other countries?

SUMMARY

With approximately 90% the research has shown that Facebook, Instagram, Booking.com, e-mail and website are the most familiar in all three markets.

In the last 12 months Facebook and e-mail have been the most used digital tools with over 85% use.

The use of TripAdvisor and Airbnb is expected to increase next year.

Respondents showed that they want more detailed information, help and training primarily for Google tools.

THE PURPOSE OF USING DIGITAL TOOLS:

Digital tools are primarily used for promotion and to attract guests and communicate with them (about 90% of respondents), while they are least used for the payment process and business organization.

KEY ISSUES:

Lack of knowledge and skills for using digital tools. Lack of financial resources for investing in digital tools and expensive external services.

A significant problem for all three markets is the lack of knowledge and information about the content that should be published on social media and other digital tools.

DETAILED FINDINGS



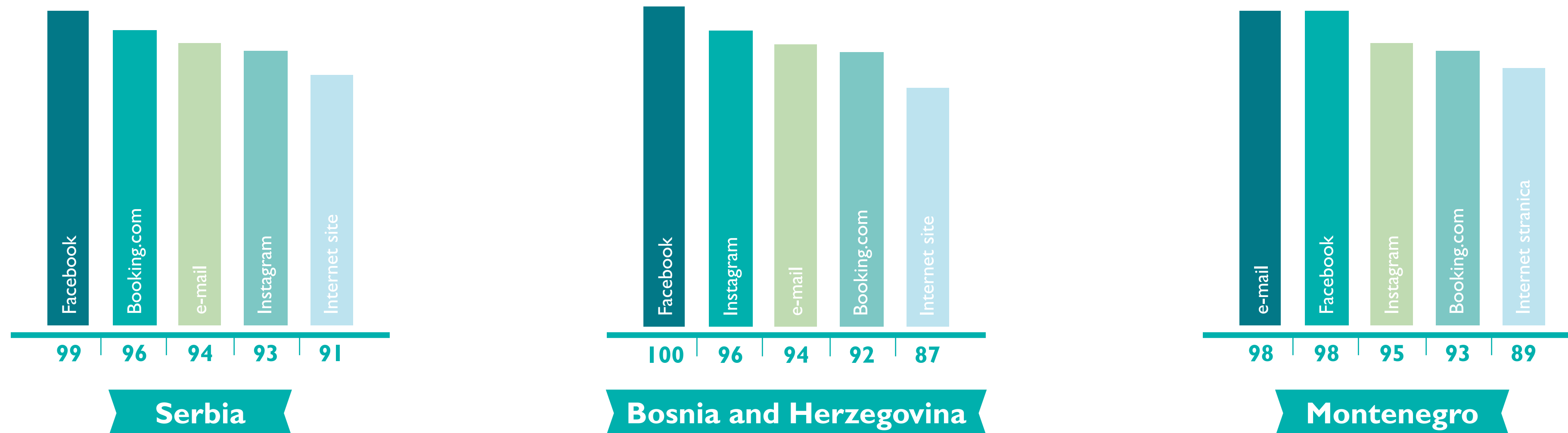
The image features a scenic landscape of rolling green hills and a lake, partially obscured by teal geometric overlays. The text "AWARENESS AND USE OF DIGITAL TOOLS" is prominently displayed in the upper right quadrant. The background is a light blue gradient, and the foreground is dominated by the teal geometric shapes and the landscape imagery.

AWARENESS AND USE OF DIGITAL TOOLS

AWARENESS OF DIGITAL TOOLS

QUESTION: Here is the list of digital tools for communication and business
Which ones have you heard of so far, at least by name?

The results * indicate that awareness of Facebook, Instagram, email and the website as the basic digital tool in business and communication is very high in all 3 markets - around and above 90% of the company.



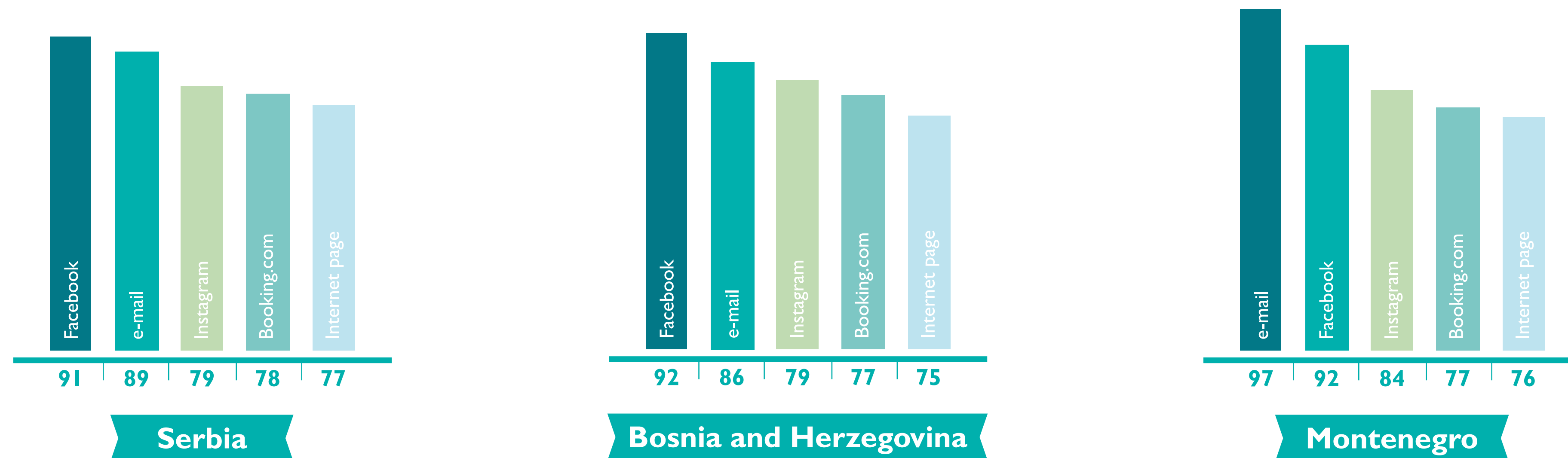
Sample: Serbia N=106; Bosnia and Herzegovina N=118; Montenegro N=97

THE USE OF DIGITAL TOOLS

QUESTION: Which of these digital communication and business tools have you ever tried / used?

Mark the ones you have tried / used without using them for your current entrepreneurship / company

The results * indicate that Facebook and email are the most commonly used digital tools in micro and small rural, eco and adventure tourism businesses in all three markets

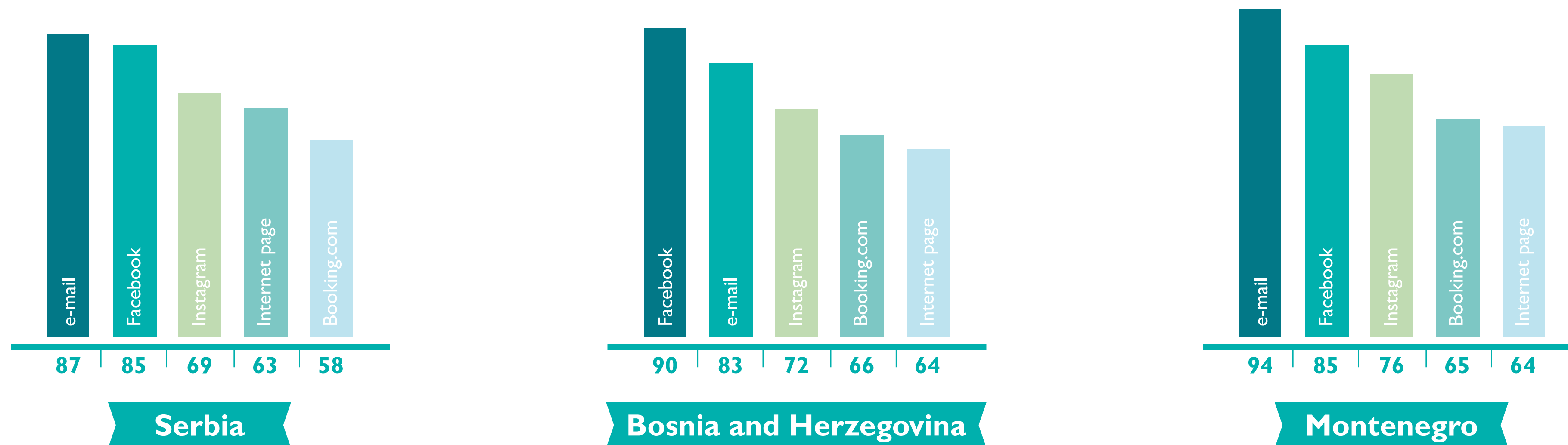


Sample: Serbia N=106; Bosnia and Herzegovina N=118; Montenegro N=97

THE USE OF DIGITAL TOOLS IN THE PAST YEAR

QUESTION: Which of these digital communication and business tools did you use in your entrepreneurship / company in the past year?

The results * show that the most used tools for digital communication and business over the past year in the target markets were email and Facebook - around and above 85%.

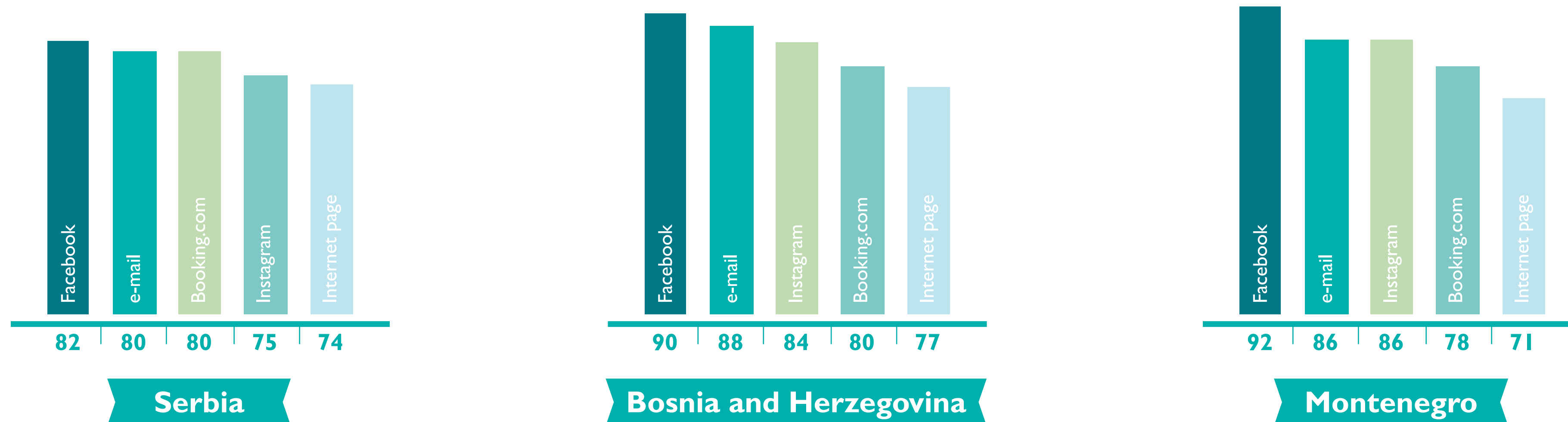


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THE USE OF DIGITAL TOOLS IN THE FUTURE

QUESTION: Which of these digital tools do you plan to continue or start using in your entrepreneurship / company in the following year?

The results * show that Facebook, email, Booking.com, Instagram and the website are digital solutions that most companies in the target markets plan to continue or start using in the next year - above 70%.



Sample: Serbia N=106; Bosnia and Herzegovina N=118; Montenegro N=97



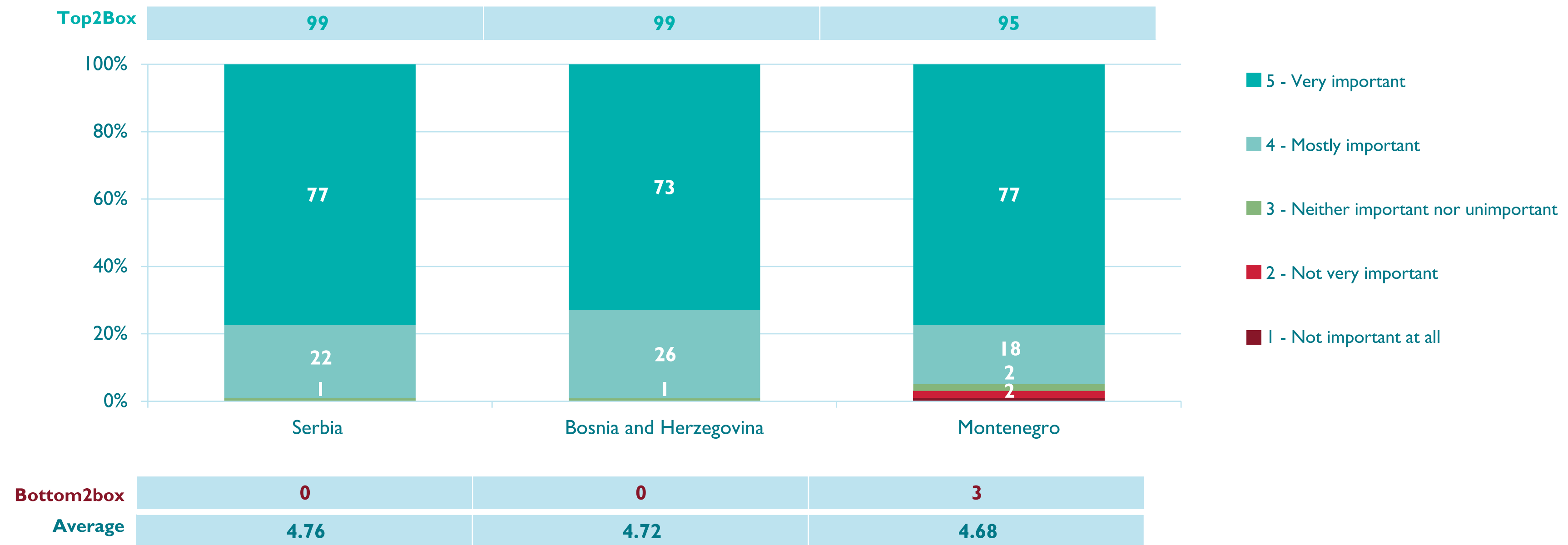
THE PERCEIVED SIGNIFICANCE AND SATISFACTION OF DIGITAL TOOLS

THE IMPORTANCE OF DIGITAL TOOLS

How important are these digital tools for the business of your entrepreneurship / company?

Rate on a scale from 1-Not important at all to 5-Very Important, whereas 3 stands for Neither important nor unimportant

The results * show that most companies in all 3 markets consider digital tools important for their entrepreneurship - 95% and more, and with an average score of around 4.7 on a scale of 1 to 5.

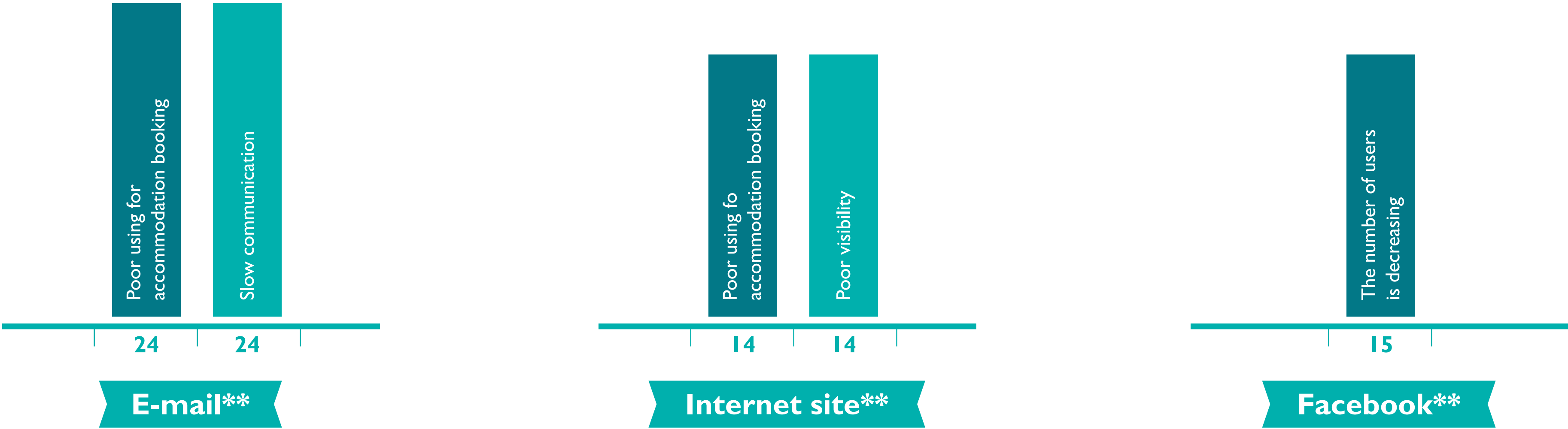


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DIGITAL TOOLS – SOURCES OF DISSATISFACTION

QUESTION: With what are you not satisfied when it comes to _____?

The results* indicate that the main sources of dissatisfaction with e-mail are poor use of accommodation reservations and slow communication (24% each). The key problems with the website are poor use of accommodation reservations and poor visibility of companies on the Internet (14% each), while the main source of dissatisfaction with Facebook is the reduction in the number of its users (15%).



Sample: E-mail N=25; Website N=22; Facebook=26

*Results shown on all 3 markets in total
**Results indicative due to small base

DIGITAL TOOLS – SOURCES OF DISSATISFACTION

QUESTION: With what are you not satisfied when it comes to _____?

The results * indicate that the main source of dissatisfaction with Instagram is poor visibility among customers / potential customers (about 20%), while the main disadvantage of the AirBnb platform is poor use for booking accommodation (17%).



Sample: E-mail N=25; Internet site N=22; Facebook=26

*Results shown on all 3 markets in total

**Results indicative due to small base

DIGITAL TOOLS – SOURCES OF DISSATISFACTION

QUESTION: With what are you not satisfied when it comes to _____?

The results * show that every other company that has been dissatisfied with the use of the Booking.com platform in the past 12 months mentions high commission as the main source of dissatisfaction. Slow communication with potential tourists is the main drawback of Google my business platform.



Sample: E-mail N=25; Internet site N=22; Facebook=26;

*Results shown on all 3 markets in total

**Results indicative due to small base

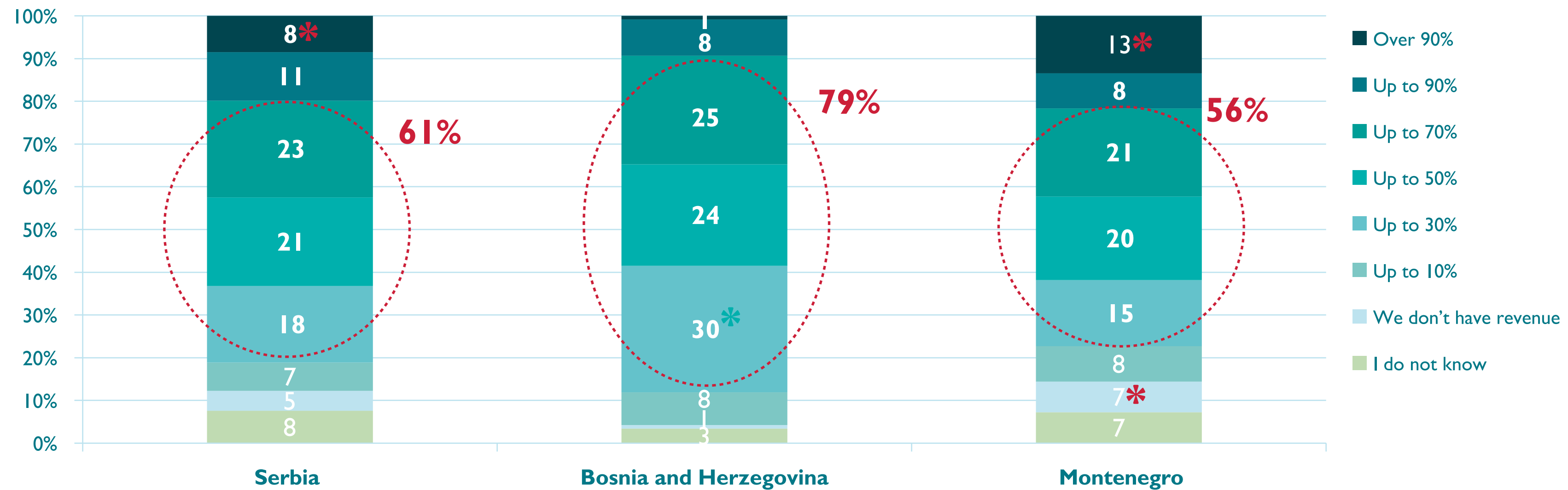
KEY PURPOSES AND CHALLENGES



DIGITAL TOOLS AND COMPANY'S REVENUE

Estimate what part of the company's revenue you generate using digital communication and business tools.

The results * show that most companies in the target markets estimate that they generate between 30% and 70% of their revenues with the help of digital tools.



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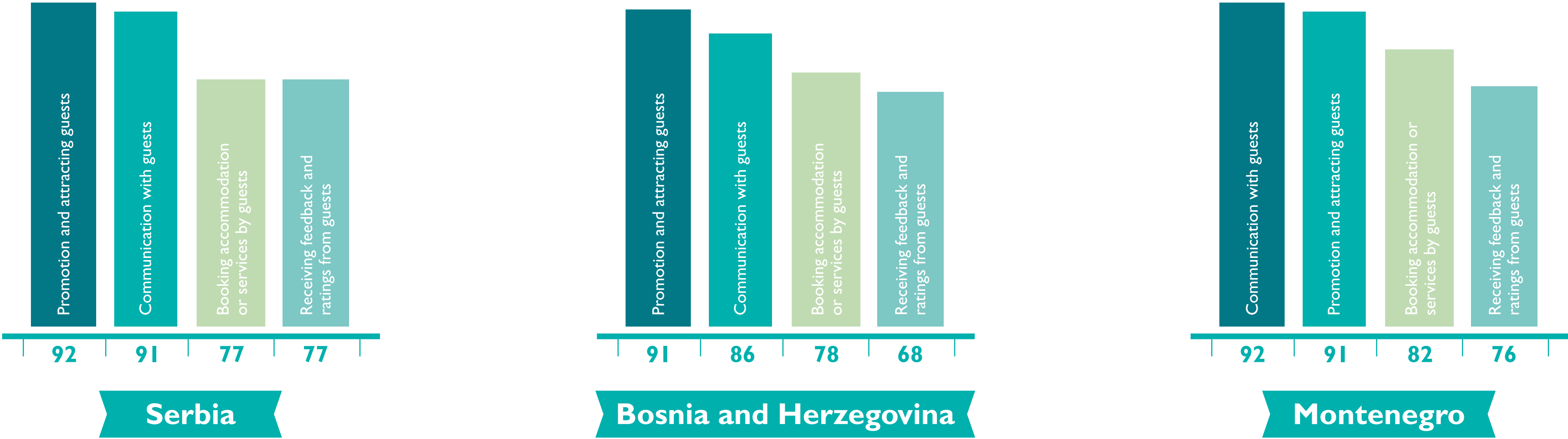
* **Red asterisk** denotes statistically significant differences with regard to Bosnia and Herzegovina

* **Green asterisk** denotes statistically significant differences with regard to Montenegro

DIGITAL TOOLS – PURPOSES

For what purposes do you use digital communication and business tools?

The results * show that most companies in all 3 markets use digital tools for promotion, to attract guests and to communicate with them – around 9 out of 10.

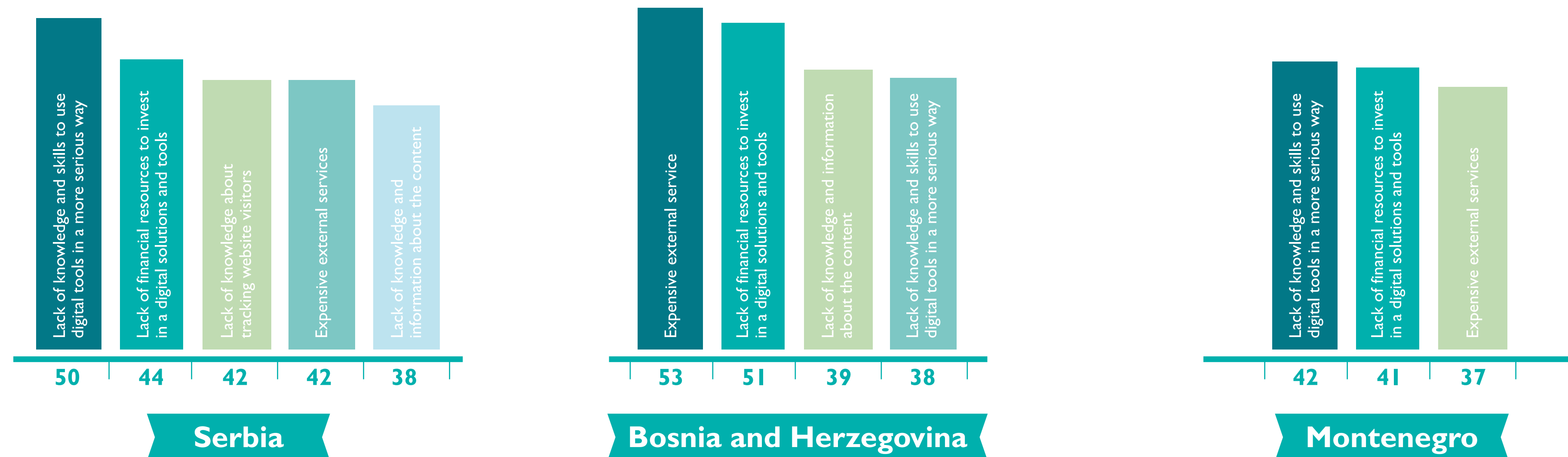


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DIGITAL TOOLS – KEY CHALLENGES

What are the key problems that your entrepreneurship / company faces when it comes to digital tools of communication and business?

The results * show that the key challenges that companies face in the use of digital tools in all 3 markets are the lack of knowledge and skills for the use of digital tools, lack of financial resources to invest in digital tools and the cost of external service.



Sample: Serbia N=106; Bosnia and Herzegovina N=118; Montenegro N=97

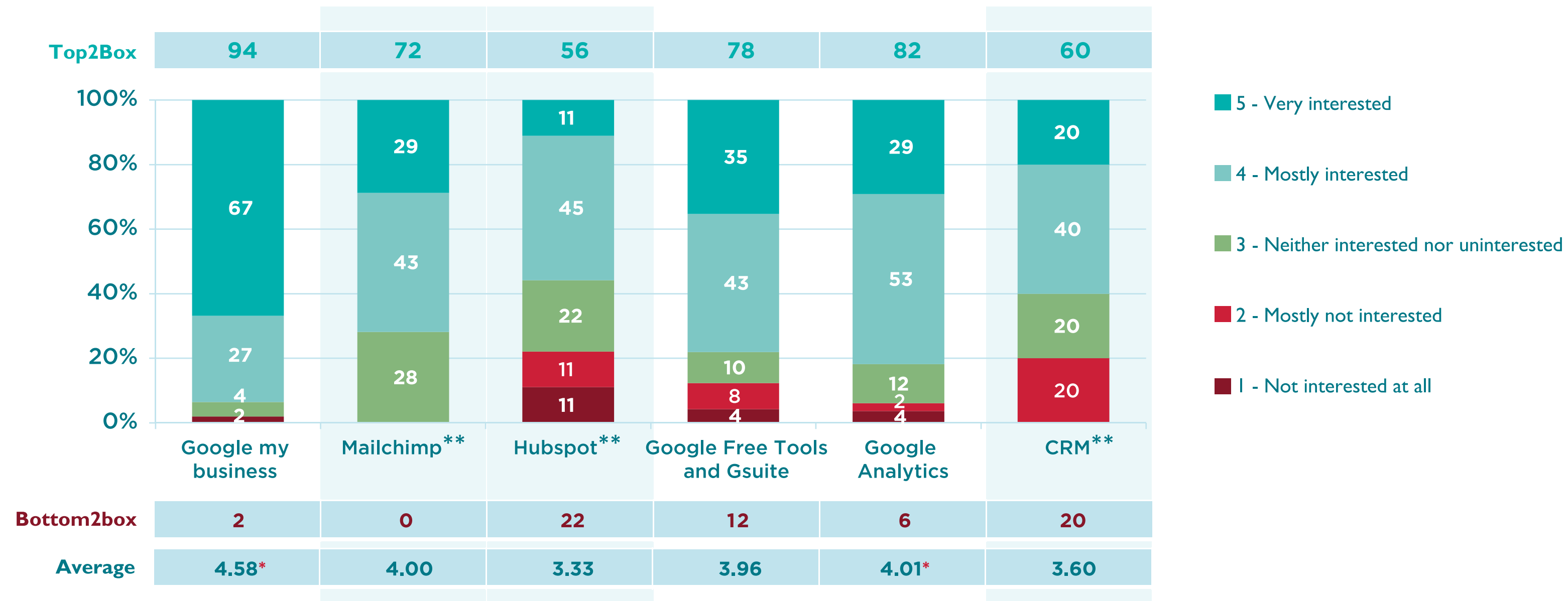


INTEREST IN USING DIGITAL TOOLS

INTEREST IN USING DIGITAL TOOLS – SERBIA

How interested are you in: Google my business ? ; Q20. Mailchimp? ;Q21. Hubspot? ;Q22. Google Free Tools and Gsuite? ;Q23. Google Analytics? ;Q24. CRM?

The results * show significant interest in tools such as Google Analytics, Google Free Tools and Gsuite (about 80%)



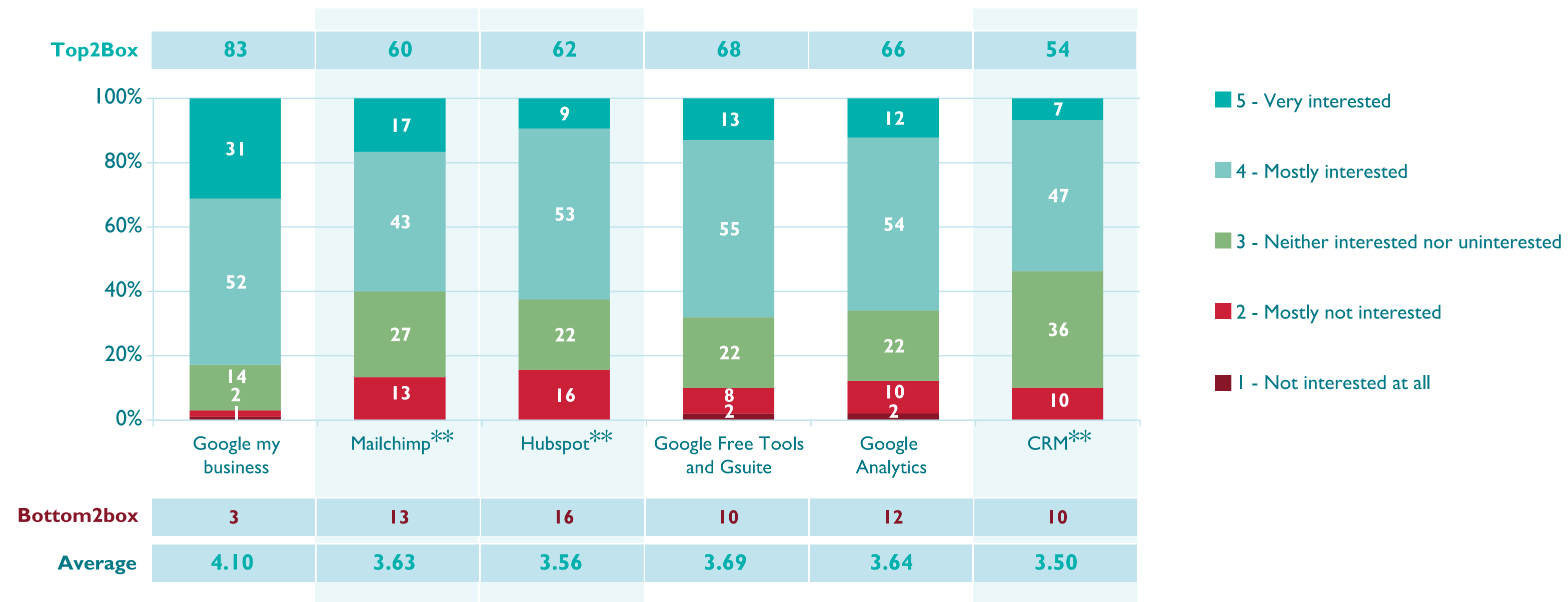
Sample: Google my business N=67; Mailchimp N=7; Hubspot N=9; Google Free Tools and Gsuite N=94; Google Analytics N=82; CRM N=5

** Results indicative due to small base
* Red asterisk denotes statistically significant differences with regard to Bosnia and Herzegovina

INTEREST IN USING DIGITAL TOOLS – BiH

How interested are you in: Google my business ? ; Q20. Mailchimp? ;Q21. Hubspot? ;Q22. Google Free Tools and Gsuite? ;Q23. Google Analytics? ;Q24. CRM?

The results * show that the digital tool that most companies in Bosnia and Herzegovina are interested in is Google my business - about 83%



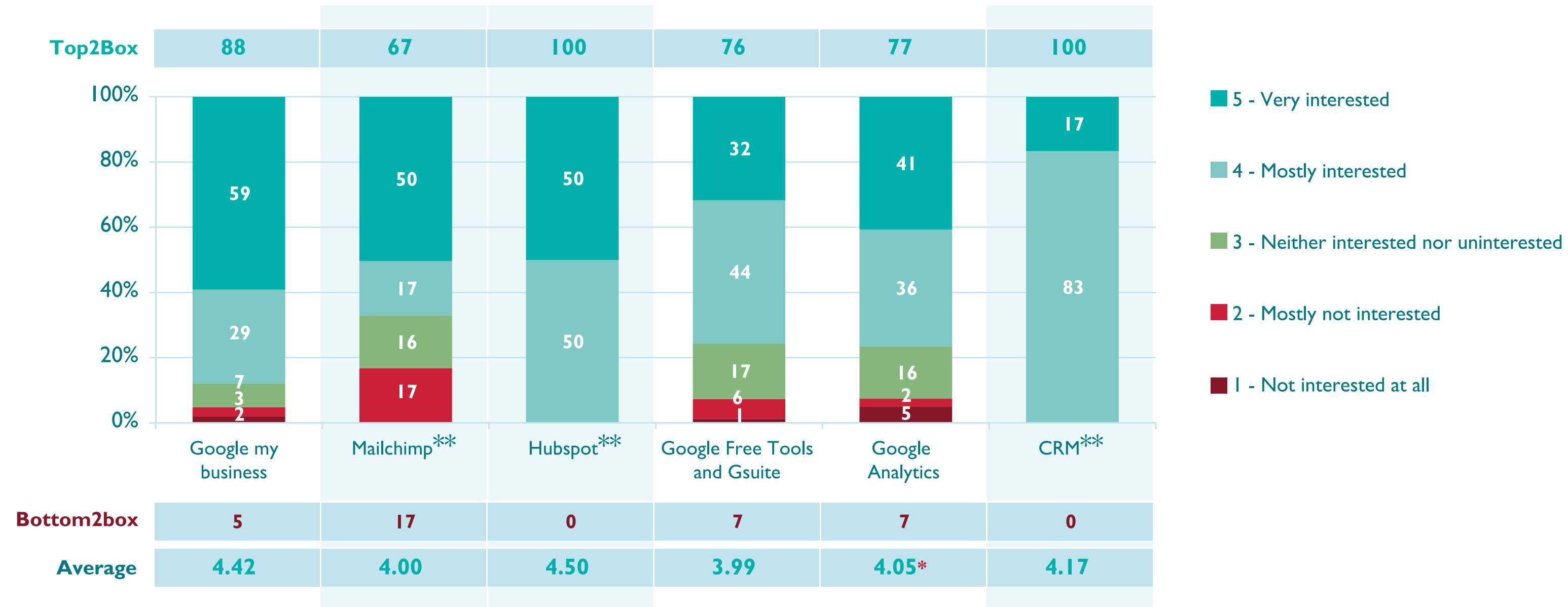
Sample: Google my business N=70; Mailchimp N=30; Hubspot N=32; Google Free Tools and Gsuite N=100; Google Analytics N=98; CRM N=30.

** Results indicative due to small base

INTEREST IN USING DIGITAL TOOLS – MONTENEGRO

How interested are you in: Google my business ?; Q20. Mailchimp? ;Q21. Hubspot? ;Q22. Google Free Tools and Gsuite? ;Q23. Google Analytics? ;Q24. CRM?

The results * show that almost 9 out of 10 companies in Montenegro are interested in Google my business tool, with significant interest in Google Free Tools and Gsuite and Google Analytics (about 75%). Montenegrin companies show slightly greater interest in Google Analytics when compared to companies in Bosnia and Herzegovina.



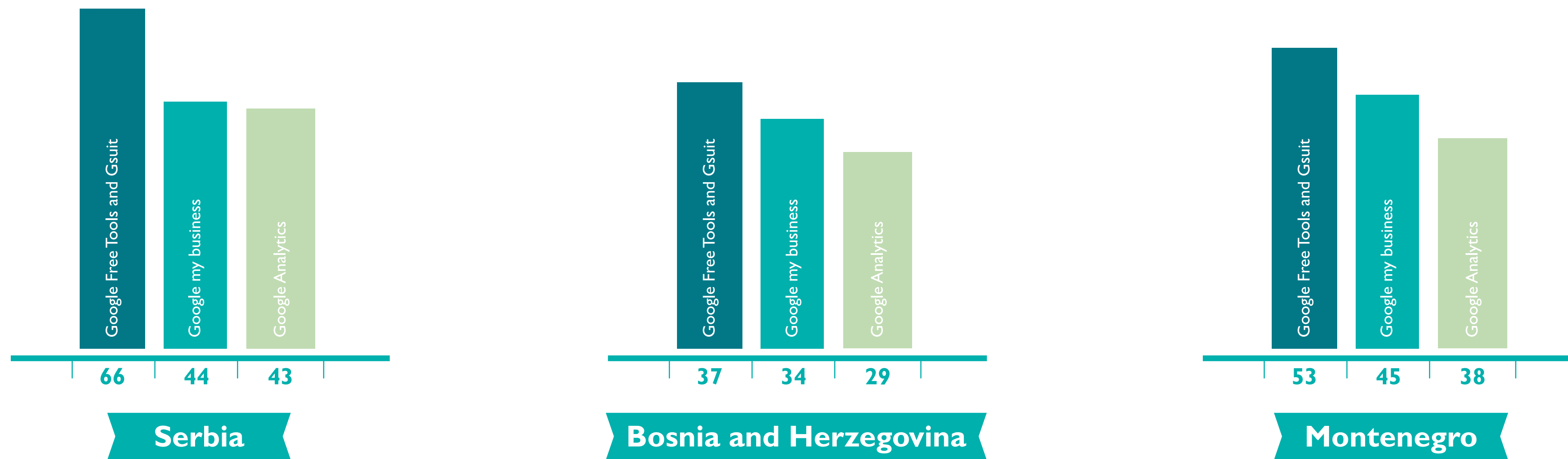
Sample Google my business N=69; Mailchimp N=6; Hubspot N=6; Google Free Tools and Gsuite N=82; Google Analytics N=81; CRM N=6.

** Results indicative due to small base
*Red asterisk denotes statistically significant differences with regard to Bosnia and Herzegovina

DIFITAL TOOLS – INFORMATION, HELP AND TRAINING

For which of these tools do you want to get more detailed information, help and training about their functionality and use?

The results show that Google Free Tools and Gsuite are digital tools for which most companies want to get additional information, help and training. That is the case especially in Serbia (2/3 od companies). Additionally, there is significant interest in other Google tools, such as Google my business and Google Analytics in all target markets.



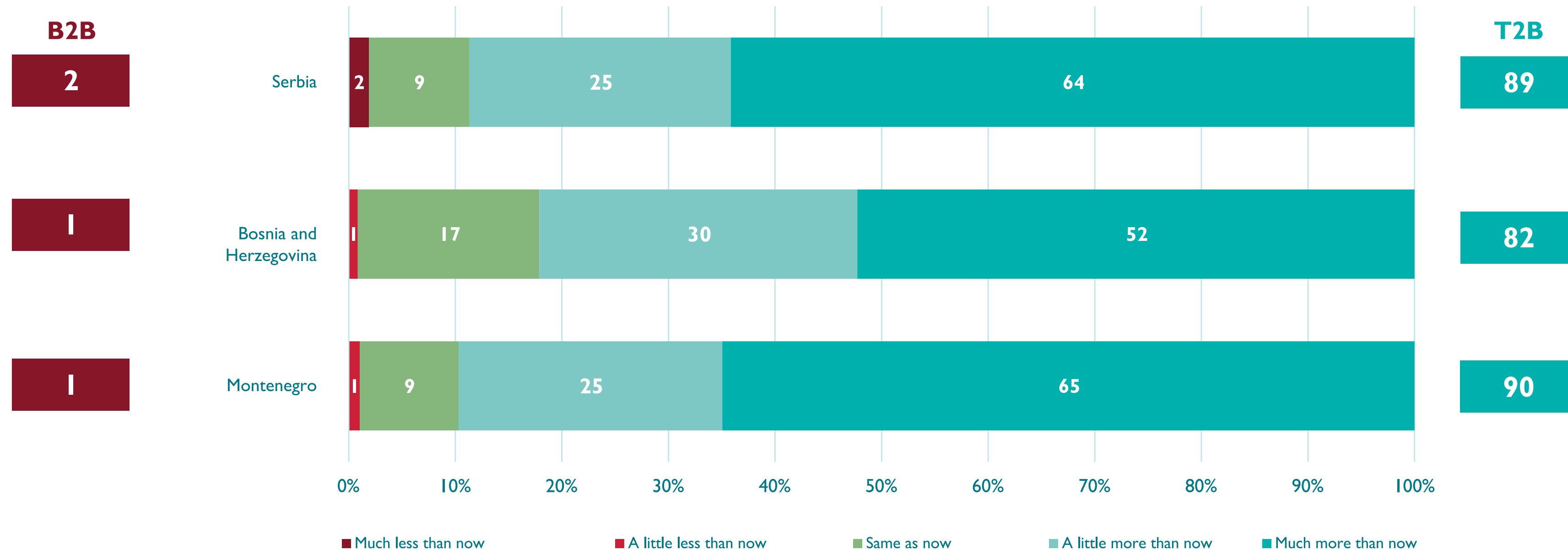
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THE USE OF DIGITAL TOOLS – TOURIST’S PERSPECTIVE

What are your expectations? – To what extent will an average tourist use digital tools for obtaining information, booking, paying and inquiring/leaving a comment in the next 5 years?

The results show that between 80% and 90% of companies in the target markets expect an increase in the use of digital tools for obtaining information, booking, paying and leaving comments in the next five years.

Majority of Serbian and Montenegrin businesses (around 65%) expect much higher usage of digital tools on behalf of tourists’, while there are indications of a slightly more modest increase in expectations in Bosnia and Herzegovina (52%).

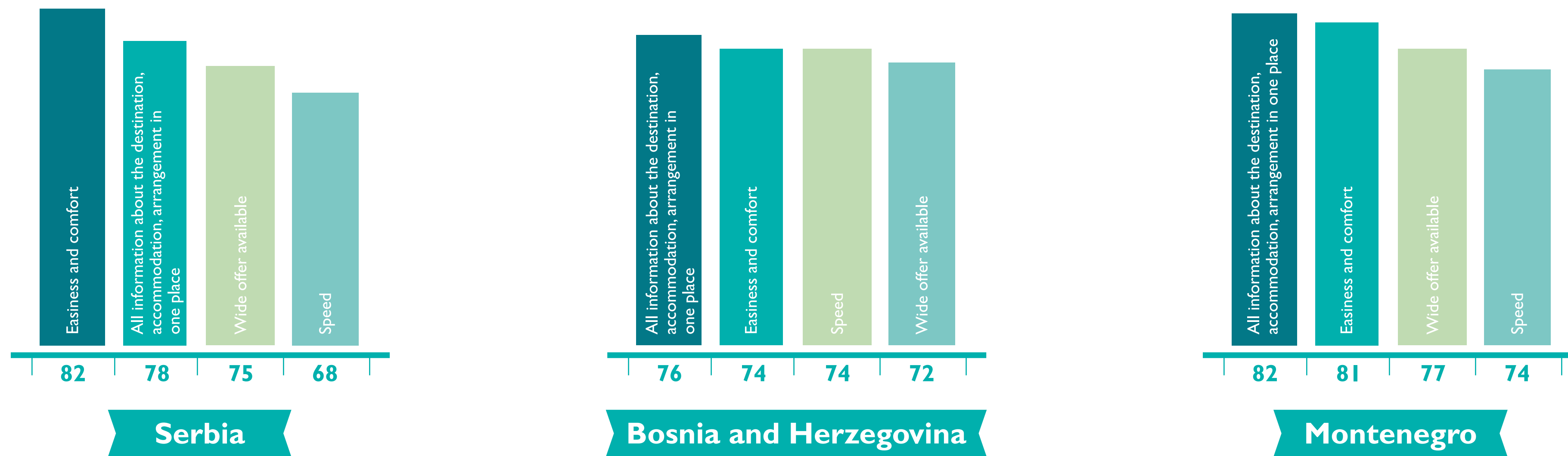


Sample: Serbia N=106; Bosnia and Herzegovina N=118; Montenegro N=97

ADVANTAGES OF DIGITAL TOOLS – TOURIST’S PERSPECTIVE

In your opinion, what are the advantages of digital tools for tourists?

The results * show that between 70% and 80% of companies in all markets see multiple benefits of digital tools for tourists. In addition to the ease and comfort of use and availability of all information in one place, companies understand that customers would benefit from a widely available offer and speed of access to information.



Sample: Serbia N=106; Bosnia and Herzegovina N=118; Montenegro N=97

Recommendations

ENCOURAGE

- Show all the benefits of digital tools to employees in tourism. Show how easily digital tools are available to everyone.
- Inspire and support micro business owners to take on their own presentation and promotion.
- Illuminate the process of digitalization as something that can be achieved in small steps, for a proportionate amount of money.
- Establishing and strengthening cooperation with tourist organizations as an important intermediary.

EDUCATE

- Provide representatives of SMEs in tourism with different types of education that would be adapted to both the types of digital tools and their needs.
- Connect SMEs in tourism with each other so they can learn from each other regarding developing digital tools and digitalizing businesses.

FOOD FOR THOUGHT

- Consider involving medium and large enterprises as potential target groups for the digitalization process, especially when it comes to more complex tools.

This research summary was prepared by [ICT Hub](#) in collaboration with [Digitalizuj.me](#) from Montenegro and [JS Guru](#) from Bosnia and Herzegovina with the support of the American people through the United States Agency for International Development (USAID). The views expressed by the authors in this research summary do not necessarily reflect the views of the United States Agency for International Development or the United States Government.