





BRIDGING THE GAPS BETWEEN REALITY AND WHAT'S PROMISED

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1. Project basics

The image of a certain city (town) is "...the sum of beliefs and impressions people hold about places. Images represent a simplification of a large number of associations and pieces of information connected with a place. They are a product of the mind trying to process and pick out essential information from huge amounts of data about a place..." Therefore, we can conclude that the promotion of certain place as a tourist brand can be done on three levels. First level will be original image about the tourist brand derived from personal contacts, media, books, movies, education etc. The second level, as an addition to original image is one which is created over public relation (PR) activities, advertising, and various marketing activities. However, the third and arguably most important level for creating complete tourist brand is the personal experience which is created through direct contact with the tourist place. In this phase, tourist expectations about the tourist place created in first two levels of promotion, should be met and justified.

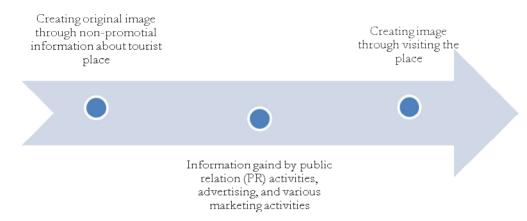
If we start from an assumption that Ohrid is well promoted tourist brand and many people have already created an original image about it, than

¹ Kotler P., David G., "Country as a brand, product and beyond: a place marketing and brand management perspective", *Destination branding, creating the unique destination proposition, second edition, ELSEVIER*, Amsterdam, 2006, p. 42

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only through visiting the place the whole image will be completed. When visiting the place, tourist experience itself should have key role in confirming the "image" of the place. Therefore, special attention is needed on tourist opinion about the place which is visited (in this case Ohrid). Identifying disproportions between levels of promotion and the image which is created when the place is actually visited, is a priority when building Ohrid as a brand in tourism. Thus, it is necessary to give directions for avoiding above mentioned disproportions so the promotional activities will be more effective and the number of tourists visiting Ohrid will increase.

Picture 1: Levels of promotion of certain city in tourist brand



This project is just a phase of a wider spectrum of activities which will mean promotion of Ohrid as an attractive brand in tourism. Such activities should lead to more interest in potential tourists to visit Ohrid, and when creating positive experiences from their visit, to multiple the number of guests (tourists). In this way, a solid basis should be initiated on which platform further promo activities will be implemented.

2. Main objective

Identifying and overcoming eventual disproportions between *original image* and the image of Ohrid as a tourist product which is promoted through marketing activities, from one side, and image which is created when the tourists came in Ohrid. While, a solid basis should be initiated on which platform further promo activities will be implemented from the Local Government.

3. Special objectives

- Obtaining data about "original image" about Ohrid as a tourist brand
- Obtaining data about the image of Ohrid which is created through "marketing activities"
- Obtaining data about "the image" which is formed by tourists at their first visit of Ohrid
- Determination of the experience which tourist have during their visit of Ohrid, compared to their previous cognition about Ohrid as a brand in tourism.
- Identifying eventual disproportions which can occur when we speak about Ohrid as "a promising tourist brand" from one side, and brand which "meets", from other side.
- Giving directions for overcoming previously mentioned disproportions, in purpose completing the tourist brand (Ohrid)

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4. Target group and main beneficiaries

Target group: Foreign tourists

Beneficiaries: Tourism subjects (agencies, hotels, restaurants, guides etc),

local residents, local government etc.

5. Research methodology

Initially, the survey was set to begin at the peak season, but because

some objective reasons, project activities were delayed and the survey

started in late August (early September) and was finished in November

2011.2 However, the delay combined with certain risk-factors3 did not affect

the relevance of obtained data.

The research itself consists of two parts. First part is a desk research

which provided knowledge about the dynamics of tourist fluctuation in

Ohrid via set of indicators such as: number of foreign tourists, number of

nights spent, tourism income etc. Also, we'll try to make systematization and

identification of the sources that foreign tourists use to create so called

"original image" and an overview of all promotional activities on local and

national level which are in direction of creating Ohrid as a tourist brand as

well (PR, advertising, marketing etc.) Also, desk research will help in

² The Project Agreement was signed on 24.08.2011

³ Insufficient approach of interviewers to the given task, indifference of tourist for

fill-in the forms indifference and uncooperative tourist subjects

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preparing the field research, especially in deterring the representative sample of respondents, arranging questionnaire and scientific interpretation of obtained data. Second part of the research is connected with field activities, such as interviewing foreign tourists in order to find out their *experience during first visit to Ohrid* and find out if their previous expectations are met. According the results, we will give directions and suggestions for improvement of the tourist offer and tourist promotion of Ohrid.

5.1. Desk research

The desk research in a sense was the root of field research. Scientific and expert literature was used for creating the methodology of research and to indentify criteria to determine the sources for creating image of a tourist place. Numerous sources were used, mainly Internet, for obtaining data about the ways and the scope of promotion and presentation of Ohrid in front of foreign tourists, and the dynamics of tourist trends in Ohrid over the previous years. As the most relevant sources were considered web pages of the Local Government Ohrid, Macedonian Agency for promoting and supporting tourism, HOTAM (Macedonia hotel association), Ministry of economy, State Institute of Statistics etc.

5.2 Field research

Field research was conducted by using the methods of interviewing foreign guests. In this sense, a questionnaire was prepared with 12 questions which are closely related to main goals of the Project (see Appendix A). The questionnaire was translated in 3 languages: English, Serbian and Dutch. For project purposes 200 questionnaires were printed and distributed to

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various hotels, private accommodations, travel guides, and travel agencies. In order to provide properly filled questionnaires, few training sessions for interviewers were implemented. Correctly filled and returned were app. 45% of the previously distributed questionnaires.

Table 1: Review of distributed and correctly filled and returned questionnaires

	Distributed	Correctly fill-in and returned
Hotel "Metropol"	35	10
Hotel "Slavija"	35	30
Hotel "Milenium"	30	15
Hotel "Granit"	35	11
Rooms "Mira"	25	11
TA "Generalturist"	20	8
Travel guides	20	0
on-line	>100	26
Total:	>300	111

In addition, with an assistance of local travel guides and few Travelagencies, an on-line questionnaire was distributed to over a hundred respondents (return ratio app. 1 out 4). In this way, despite all difficulties during project implementation due to previously mentioned risk – factors, we managed to provide a relevant number of 111 filled questionnaires. This will enable some interesting conclusions which will be used in giving further directions for improving the tourism promotion of Ohrid.

6. Results

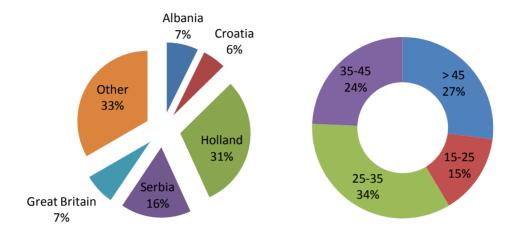
Survey results indicate the reasons (motives) to visit Ohrid. Also it helps to identify the sources of information which foreign tourist were using in "creating the image" before the visit, and later the experiences of their visit. This enables identifying critical points in tourism promotion where disproportions between "expectations" and "reality" exist.

6.1 Determination of a representative specimen

Structural analysis of the respondents was made according to country they came from, age, are they first-visitors or repetitious. Most of the foreign tourists interviewed were from The Netherlands (31%), ahead of guests from Serbia (16%), Albania (7%), Great Britain (7%), Croatia (6%) and other countries such as: Algeria, Australia, Austria, Belgium, Bulgaria, Canada, Germany, Finland, Hungary, Ireland, Israel, Italy, Latvia, Morocco, N. Cyprus, Norway, China, Romania, Slovenia, Spain, Sweden, Switzerland, Turkey and USA (33%). Latest information on tourism given by State Statistical Office, confirm that visitors from first 5 countries enumerated above in the report, are about 30% of total number of foreign tourist that visited Macedonia in September 2011. We can conclude that the structure of guests interviewed in the survey is proportional to the structure of guests that visited Ohrid and our country which means that representative sample of respondents is obtained. The structure of nationalities can be seen in chart 1.

⁴ State Statistical Office, News Release – Tourism September 2011, No. 8.1.11.27, SSO, Skopje, 14.11.2011, pp.3-4

Chart 1: Percentage of respondents (country and age)



Greater part of respondents, or 66% visited Ohrid for the first time, while one third of them, or 34% came in more occasions. We have mentioned above that complete image about one tourist place is created during and after visiting the very place, whereby expectations and impressions are compared. Structure of the interviewed guests is in favor when determine relevant information about eventual disproportions between "expectations and reality" and will help to provide proper conclusions and recommendation for improving tourist promotion and tourist offer of Ohrid.

6.2 Reasons to visit Ohrid

According to World Tourism Organization, greater part or app. 51% of all international travel in 2010 are realized in tourists' spare time and for vacation and recreation. Round 27% of tourists are included in international travel in purpose of visiting friends and relatives, religious reasons, health treatment etc. 15% of people travel for business and professional reasons and only 7% "other reasons".⁵

Following these trends, greater portion or 43% of our respondents, state that their main motive for visiting Ohrid is "recreation & pleasure". This, together with 11% of the answers "sightseeing of the cultural heritage", combined close to 55% of foreign guests that visit Ohrid to spend leisure time. Relatively high percentage of respondents (31%) came to Ohrid as participants on "a seminar, a conference", and 6% for "business". The survey was conducted off-season so results show that congress tourism has great potential in Ohrid.

Chart 2 shows the answers of the foreign tourists about the reasons to visit Ohrid together with overview of first – comers and those who revisited Ohrid.

http://mkt.unwto.org/sites/all/files/docpdf/unwtohighlights11enlr_1.pdf, last accessed on 05.09.2011, p. 3

⁵ UNWTO, Tourism Highlights 2011, online edition:

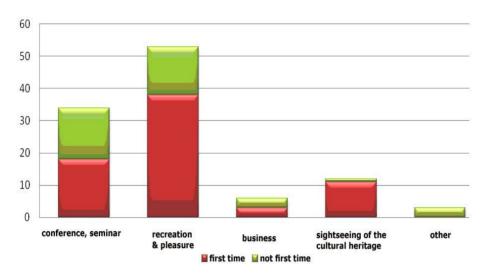


Chart 2: Motives to visit Ohrid

It is important that most of the foreign tourists who came for the first time in Ohrid, were here for "recreation & pleasure" and "sightseeing of the cultural heritage", which confirms the undoubted attractiveness of Ohrid as a tourism and travel center which motivates guests from abroad to spend part of their spare time and visit Ohrid.

Results of the survey show that for the 75 percent of the foreigners, finances are NOT decisive factor when making decision to visit Ohrid. Some 25% honestly "admits" that finances were decisive factor before they took the trip to Ohrid, but most of them will revisit the town. Authorities must bear in mind this in future, when forming prices for organizing conferences or seminars, type of tourism which undoubtedly has very good potential in our town.

Important: Only a quarter of those who visit Ohrid for the first time, made their decision according to their finances which leads to conclusion that usually foreign guests (75%) are motivated to visit Ohrid, nevertheless finances.

6.3. Source of information for creating the image of Ohrid as a tourist brand

The promotion of certain place as a tourist brand is done on three levels. First level will be "original image" about the tourist brand "derived" from personal contacts, media, books, movies, education etc. The second level, as an addition to "original image" is one which is created over PR activities, advertising, and various marketing activities. However, the third and arguably most important level for creating complete tourist brand is "the personal experience which is created through direct contact" with the tourist place. In this phase, tourist expectations which were in "his head", expectations created in first two levels of promotion, should be met and justified. Motivation to visit certain place means that future visitors has certain expectations of the place. These expectations are based on the information received on the first two levels of promotion. This part of survey will determine how guests from abroad got the initial information which "initiated" the desire to visit Ohrid. Further, this knowledge will help us to determine does this tourist brand fulfills the initial expectations and what were the experiences after the first visit, which is, as mentioned above, the third level of promotion.

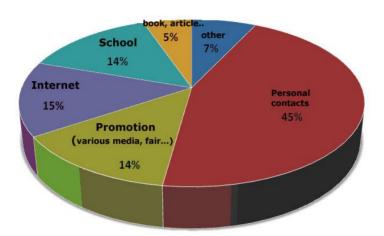


Chart 3: Sources used as initial info for Ohrid

Obtained results show that even 45% of foreign visitors heard about Ohrid for the first time through personal contacts. More that 14% of them, mostly from Balkan countries and ex - Yugoslavia have heard about Ohrid during their education and only 5% from a book or newspaper. Somewhat unexpectedly, we come to conclusion high 65 percentages of the respondents, the very first image and expectations get on the first level of promotion, or one can say without any special activities of the tourist and travel representatives. This consciousness shows that tourist with positive experiences gained when visiting the place can multiply the number of visitors and nights spent in Ohrid. Also it enhanced the attractiveness of our town as significant cultural and historical center on the Balkans which causes much information about it to be delivered through books, films, journals and various media. That, on the other hand motivates tourist from Balkan countries to visit Ohrid.

Opposite expectations, less than 36% of the visitors mark the answer that their first information about Ohrid was through promo –

activities of the tourist authorities. Most of them (15%) got initial info via Internet and 14% via newspapers and various media. Part of the respondents (7%) has heard about Ohrid through promo information about fairs, summer schools etc (chart 3).

Significant role on promotion of Ohrid as a brand has Local Government - Ohrid. Public information provided by the Local Government show that Ohrid was promoted on various media, as follows: RTV Pink Serbia, RTRS Serbia, RTV BN, RTV Republika Srpska, RTV Vojvodina, RTS Radio Beograd, Radio Televizija Srbija, RTV Nis, Radio Beograd 202, TV Jesenjin, TV Enter, Site club (travel journalists Serbia), TV F Zajacar, TV Zajecar, Index Radio, national TV show "Dobro ti vecer" ("Good evening to you" - our remark) broadcasted on 110 TV stations in Serbia and Bosnia & Herzegovina. Also, Ohrid was promoted in several Serbian newspapers: "Politika", "Danas", "Bazar", "Ona", "Press" and in the periodical "Serbian National review". Municipality has promo material on Dutch, Turkish, Serbian and English as well. ⁶ Further, in 2010, Ohrid was presented on International tourist fairs in Ohrid, Utrecht (The Netherlands) Budva (Montenegro), Istanbul (Turkey), Belgrade (Serbia), Sofia (Bulgaria), Berlin, Nis (Serbia), Brussels, Veliko Trnovo (Bulgaria), Jalova (Turkey), Novi Sad, Kragujevac and Leskovac (Serbia)

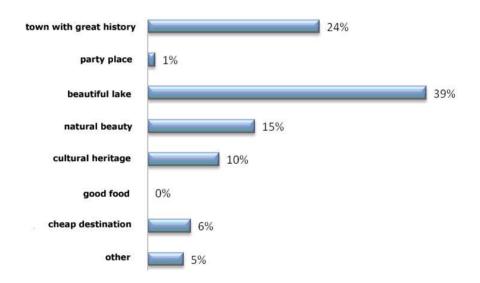
It can be concluded that although various presentations about Ohrid are made, still, most of the "first comers" created an image about Ohrid from other sources. One gets the impression that information market is insufficiently used and filled with promo materials on tourism values.

⁶ TLER Sector, Annual Report on Program for supporting tourism development 1.1. 2010 – 31.12.2010, Municipality of Ohrid, pp.2

6.4. Experiences of foreign tourists

Before examining the degree of satisfaction from the visit of Ohrid, foreign tourist were asked about their initial or "first thought" which they had for this tourist brand before making the visit. Up to a certain level it should be an indicator for the expectations that foreigners had before visiting the place.

Chart 4: "First thought" about Ohrid before visit



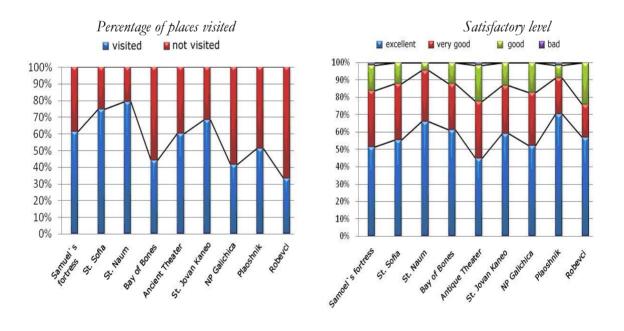
The very first impression that potential visitor have about Ohrid is "beautiful lake" (39%) and a town with "natural beauty" (15%). High percentage thinks that this is "town with great history" (24%) and "cultural heritage" (10%). Small portion of answers were "cheap destination" (6%), while no one connected Ohrid with "good food" (chart 4). According to

these results, foreigners pay more attention to natural characteristics rather than its cultural and historical significance.

Next results show the degree of satisfaction with the visit of our town, or whether Ohrid fulfilled their expectation and whether they want to visit it again.

First, survey was made about how many of the tourists have visited the more significant places or tourist motives in Ohrid, which are usually used for its promotion. The least visited site is National museum "House of Robevci" (70% never visited). Also, weak attendance has NP "Galicica" (60% never visited) and "Bay of Bones" as well (55% never visited). Most visited site is "St. Naum" (80%) together with "St. Sophia", "Kaneo" and "Samuel's fortress" (over 60%). Only half of respondents have visited "Plaoshnik" site. (Chart 5)

Chart 5: Places visited and foreign tourists satisfactory level

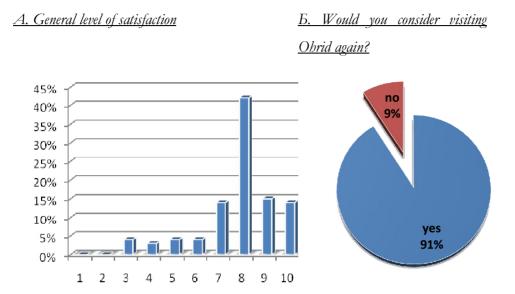


Foreign visitors gave their highest marks to "Plaoshnik" and "St. Naum". Also, high satisfactory level has "Bay of Bones", "Kaneo" and NP "Galicica". Lower level of satisfaction is shown towards "House of Robevci", "Samuel's fortress", "St. Sophia" and "Antic Theater" (chart 5). It is obvious that some sites although with high satisfaction marks, are scarcely visited by foreigners. This confirms the need of more organized trips and excursions. Increased level of satisfaction of certain places depends on correct presentation. People who carry out the process of presentation must be carefully chosen.

Part of this survey deals with "general level of satisfaction" from the visit of Ohrid and satisfaction from certain segment of tourist offer of Ohrid as well, such as accommodation, food, hygiene, prices, beaches, safety etc. Satisfaction level can be seen on chart 6.

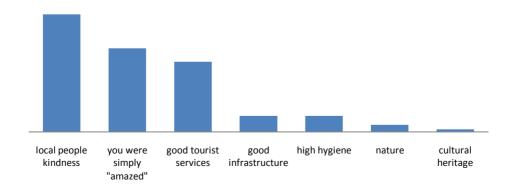
Every respondent individually evaluated personal satisfaction from visit of Ohrid on a scale from 1 to 10, where ten was maximum satisfaction. Greater part of respondents (app. 42%) mark 8, while only 15% evaluated with 3 to 6. The average score of the general level of satisfaction was 7.8 More than 91% of tourists would like to visit Ohrid again, so in general one can conclude that Ohrid meets the tourist expectations.

Chart 6: Level of satisfaction and percentage of those re-visiting Ohrid



The main reasons for "considering visiting Ohrid again" are "local people kindness", "good tourist services" and "you were simply amazed" (chart 7). Those who consider not visiting Ohrid again (9%), point out on "bad infrastructure", "distance" and "accessibility".

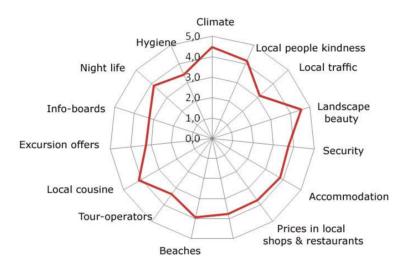
Chart 7: Main reasons for re-visiting Ohrid



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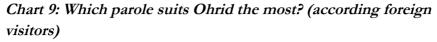
In order to identify certain dissatisfactions from the visit of Ohrid and to see where we failed in meeting the expectations, foreign tourist were asked to rank satisfactory level of various segments of tourist promotion.

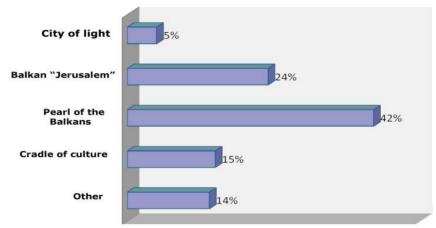
Chart 8: Level of satisfaction from certain segments of Ohrid tourist offer



More reserved attitude was shown towards general feeling of security in Ohrid. Maybe this is a result or outcome from several incidents which occurred in our town in the past year. Also, less satisfactory are the prices in local shops and restaurants, night life, accommodations and beaches, segments that received rather low marks during survey.

Contrary, higher level of satisfaction is shown when it comes to "local people kindness" and "local gastronomy", so maybe these results should lead to even stronger promotion of these segments. As expected, the respondents were most satisfied with "landscape beauty" and "climate", both categories with almost perfect marks.





Taking in consideration that there is no unified or characteristic slogan that fits Ohrid, respondents were asked to choose between several offered answers on the question "which parole suits Ohrid the most?" High 42% are in favor of the slogan "Pearl of Balkans", while 24% think Ohrid is "Balkan Jerusalem". Few of them answered "Cradle of culture", even fewer "City of Light". More than 2/3 of the guests think that Ohrid is not only Macedonian but symbol of Balkans as well.

7. Recommendations and Conclusions

Survey results completely meet expectations and contributed in project goals realization. Also, results contributed in a direction of overcoming the differences between what's "promised" to foreign visitors before actual visit of Ohrid and the "reality" they face during the visit. As expected, Ohrid as a main tourist center of Macedonia, mostly attracts foreign visitors with its "natural beauty" and for "recreation & pleasure", nevertheless their finances. In off-season period high percentages of visitors come to Ohrid as members of various conferences, seminars, work-shops, schools etc. It's important to say that most of the first-comers point out that the main reasons for visiting Ohrid were "recreation & pleasure" and "sightseeing of the cultural heritage" which confirms undoubted attractiveness of our town as a recognized travel destination.

Interestingly, the results showed that people who were here on "congress tourism" (seminars, conferences etc.) planned to visit Ohrid again, but that would depend on "their personal finances" which leads to conclusion that this segment of promotion must be carefully re-considered from authorities and tourism subjects in a sense what prices are offered for organized conferences, seminars etc.

During survey we found vast number of information sources ("first thought creators") about Ohrid which are used by foreigners as a help to make a decision and actually pay visit to Ohrid. Despite large number of presentations of Ohrid on the travel market through various activities of tourism subjects (authorities), foreigners already have an initial picture (opinion) about Ohrid, based on info from completely different sources. One gets the impression that the potential for promotion is untapped. Only

proper presentation can lead to increased volume of foreign visitors. When creating promotion strategy it should be taken in consideration the fact that most of the foreign visitors are attracted by Ohrid's natural characteristics rather than from its historical or cultural significance (which is nevertheless undoubted). Very few respondents see Ohrid as a "party place" or "cheap destination".

Some of the most often represented sites in Ohrid such as: "Plaoshnik", "Bay of Bones", or NP "Galicica" get very few visits from foreigners. Also, places and monuments with great historical significance are very under-visited ("House of Robevci") which urges the need for many more organized trips and excursion offers. Who presents and maybe more important HOW the tourism values are presented to the visitors should be the main topics when promotions are organized. Undoubtedly, results don't lie – most of the foreign visitors are "unhappy" with small number of "excursion offers", "info – boards" "tour operators' competency" etc.

Significantly higher marks from the respondents were given to "local people kindness" and "local gastronomy". This fact enhances and in a way confirms well known hospitality of local people and renowned "local cuisine". So, positive trends in this segment of tourist offer should continue and must be highlighted in presentations and promotion of Ohrid.

Further, subjects like: safety, hygiene, prices in local shops, accommodation, beaches and night life were moderately rated. In order to achieve more effective promo throughout the world of travel, these segments of tourist offer must be immediately improved.

As expected, higher level of satisfaction was expressed about Ohrid's **natural beauty and climate**, segments of the questionnaire with convincingly highest marks. It should be mentioned that Ohrid needs a catchy slogan while promoting. From given options (answers), 2/3 of the

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respondents consider Ohrid as a "Pearl of Balkans" (something to have in mind while promoting the city as a travel destination)

Main conclusions derived from this survey is that Ohrid as a travel (tourism) center mainly fulfills the expectations, but certainly there is a space for improving the promotion and the quality of international presentation of Ohrid. We believe that this survey identifies "tight throats" in relation of creating positive overall image of Ohrid. Proper identification of minuses in tourism presentation, both home and specially abroad, should lead to improved management, and of course last but not least, larger number of visitors in the following years.

ANNEX A

QUESTIONNAIRE

This survey is anonymous and will be used only for the purpose of the project "Ohrid - a promising touristic brand. Bridging the gaps between reality and what's promised"

Thank you for your time!

1. Country you come from:

2.	Ag	2:					
		a. 15-25					
		b. 25-35					
		c. 35-45					
		d. >45					
3.	Is	his your first visit of Ohrid?					
	YE	S NO					
4.	What was the main purpose to visit Ohrid?						
	a.	a. recreation & pleasure					
	b.	b. sightseeing of the cultural heritage					
	c. business						
	d. a conference, a seminar						
	e.	e. sports (games, basic preparations etc.)					
	f. other						

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5. Was your decision to visit Ohrid based on:

- a. your personal finances
- b. your motivation to visit Ohrid (nevertheless finances)

6. How did you hear about Ohrid in a first place?

- a. personal contact
- b. newspaper article
- c. book
- d. movie
- e. school
- f. internet promotion
- g. tourism fair
- h. media advertisement
- i. Tourist agency recommendation
- j. Other: _____

7. What was your "first thought" about Ohrid before your visit it?

- a. "town with great history"
- b. "clean environment"
- c. "cheap destination"
- d. "good food"
- e. "cultural heritage"
- f. "natural beauty"
- g. "beautiful lake"
- h. "party place"
- i. other

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8. Have you visited the following places? If yes, please rate your degree of satisfaction with them?

	bad	good	very good	excellent	Never visited
Samoil's fortress	1	2	3	4	0
St. Sophia Church	1	2	3	4	0
St. Naum Monastery	1	2	3	4	0
Bay of Bones	1	2	3	4	0
Antique theater	1	2	3	4	0
Kaneo church	1	2	3	4	0
National park	1	2	3	4	0
Galicica					
Plaoshnik	1	2	3	4	0
Ohrid national	1	2	3	4	0
museum (house of					
Robevci)					

9.	Rate	e the ove	erall lev	el of sa	itisfactio	on from	ı your v	isit of C	hrid
	acco	ording to	o your o	expecta	tions? (1 – wor	st, 10 –	best)	
	2	3	4	5	6	7	8	9	10

10. Would you consider visiting Ohrid again?

YES NO

-If "Yes", what will be the reason? (you can choose more than one answer)

1

- good infrastructure
- local people kindness
- tourist authorities competence
- good tourist services
- you were simply "amazed"
- high hygiene
- other (what)

- If "No", what will be the reason? (you can choose more than one answer)

- bad infrastructure
- local people unkindness
- tourist authorities incompetence
- poor tourist services
- you were simply "bored"
- low hygiene
- other (what)

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11. How would you rate your level of satisfaction regarding what C							
	has to offer?						
	(1-very unsatisfied, 5-very satisfied	, and the second					
	• climate	12345					
	 local people kindness 	12345					
	• local traffic	12345					
	 landscape beauty 	12345					
	• safety	12345					
	• accommodation	12345					
	 prices in local shops 	12345					
	• prices in restaurants, bars	12345					
	Ohrid lake beaches	12345					
	• tour operators	12345					
	• local gastronomy	12345					
	 excursion offers 	12345					
	 city info boards 	12345					
	• night life	12345					
	• hygiene	12345					
12.	Which parole suits Ohrid the mana. City of light	ost?					
	b. Cradle of culture						
	c. Balkan "Jerusalem"						
	d. City of literacy						
	e. Pearl of the Balkans						
	f. Other:						

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