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OVERVIEW AND ANALYSIS OF SUMMER SEASON TOURIST MARKET IN SERBIA

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The study is a contribution towards designing tourism marketing strategy based on hard data. Statistical tests were performed in SPSS with a goal to differentiate groups of tourists both on the supply and demand side of the market, in order to gain deeper understanding of the Serbian tourist market. The study results and recommendations should be used as a contribution towards designing national and regional destination marketing strategies. The Serbian tourism market is very rich in small niches on both supply and demand side of the market. This study attempted to demonstrate the important differences these groups of tourists do exhibit in terms of key behavioral traits. Tourism policy should address the identified groups of tourists with specially designed marketing and communication strategies, appropriate to the tourist's needs and attitudes.

***Keywords*:** Contemporary tourism challenges, global tourism markets, market segmentation

JEL Classification: *L83, M1, O1*

INTRODUCTION

Purpose of the study

Tourism decision makers and policy creators, in the newly independent Republic of Serbia (gained independence in 2006.), are faced with a difficult task of reaching decisions and creating government policies with insufficient data. There hasn't been enough national level tourism research in the recent years. The country was also not part of the UN (United Nations) system from 1992 to 2000, and was very remote from the process of creation of TSA (Tourism Satellite Accounts). As noted by Hara, first proposal of TSA was made by Statistics Canada on Ottawa Conference on Tourism in 1991. First results from this pioneering

method at that time, were presented in 1994. Its method is similar to accounting method of profit-loss statements with input-output tables. (Tadayuki (Tad) Hara, 2012) TSA's give a good measure of the size of the tourism industry and its subsectors, but it cannot give answers to questions regarding tourist motivations, wants and needs, attachment to brands, satisfaction levels, etc. This means that decision makers also need quality tourism marketing research, in addition to the TSA's. This is why European Union financed Serbia Guest Survey 2011, through its pre accession assistance program, as part of the project: „Support to implementation of the national strategy for tourism".

Delimitations

The survey was conducted only during summer season, so the data should be approached with caution. The samples were, however, weighted according to the official statistics in order to gain more reliable data.

The questionnaire questions included only primary motivation for travel and no secondary motivation. In that sense, they are not suitable for detailed tourist motivation analysis, and especially for cultural tourism analysis. The data from EUROBAROMETER show that culture is a strong secondary motivator for visits, especially for city tourism. (World Tourism Organization and European Travel Commision, 2005)

REVIEW OF THE LITERATURE

Global trends in tourism markets

Major global trend on the demand side of the market will be continuing domination of Europe as region of origin of largest share of tourists on the global tourism markets, both to advanced economies, and to emerging economies. However, Asia and Pacific Region will be the region with highest growth of outbound tourism to other regions. (UNWTO (World Tourism Organization), 2011)

Table 1. Global tourism markets

		Market share (in %)				
		Actual data			Projections	
		1980	1995	2010	2020	2030
To advanced economies		**70**	**63**	**53**	**47**	**43**
From:	Africa	1.0	0.5	0.5	0.5	0.6
	Americas	15.9	11.9	8.9	7.4	6.3
	Asia and the Pacific	5.1	8.2	8.8	9.9	10.7
	Europe	47.5	42.5	34.4	29.1	24.8
	Middle East	0.6	0.3	0.3	0.3	0.3
To emerging economies		**30**	**37**	**47**	**53**	**57**
From:	Africa	1.0	1.8	2.7	3.4	4.4
	Americas	9.8	9.0	8.1	8.2	8.3
	Asia and the Pacific	3.8	8.4	12.9	16.4	19.2
	Europe	13.7	15.8	19.7	20.9	21.2
	Middle East	1.5	1.6	3.6	3.9	4.2

Source: Adapted from (UNWTO (World Tourism Organization), 2011)

Serbian national strategy for tourism development and developments on the tourism market

Holidays in cities, business tourism, MICE, Touring, Cruising, and events have been identified as priority tourism products in the Tourism Strategy of Serbia (Horwath Consuting Zagreb and University of Belgrade Faculty of Economics, 2006) (Official Gazzette of the Republic of Serbia, 2006). This products have indeed the highest potential for development, especially on the international market. However, as Petkovic and Pindzo note, tourism can be compared to heavy industry in terms of needed public and private investment in infrastructure: road and transport network, drinking water distribution, waste treatment, access to eletricity and to telecommunications. (Petković & Pindžo, 2012) International market of business and city tourism is very competitive, and these products have to be strategically developed in order to be positioned

on the international market. Minghetti and Montaguti recommend the use of multidimensional and multidisciplinary approach to this problems, with indicators from several branches of knowledge (Minghetti & Montagutti, 2010). Dunne, Flanagan and Bukley identified that the major push motivation for city break tourists is to get away from something in the home environment, accompanied with the desire to satisfy social need. This 2 motivations drive city break tourists to do as many things possible at the destination, in short time period (Dunne Gerard, 2011).

Table 2. Serbian tourism market 1989-2015

Serbian tourism market from 1989 to 2011, and Tourism Strategy projections until 2015 (in thousands)											
	1989	**Strat. base year 2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**Moderate growth scenario 2015**	**Optimistic growth scenario 2015**
Number of beds	**n.a.**	**86**	**87**	**89**	**113**	**116**	**113**	**119**	**128**	**150**	**170**
Tourist arrivals	**4,158**	**2,000**	**1,989**	**2,006**	**2,306**	**2,266**	**2,019**	**2,000**	**2,069**	**5,400**	**7,000**
Domestic	3,216	1,700	1,536	1,537	1,610	1,620	1,373	1,318	1,304	2,300	3,000
Foreign	941	300	453	469	696	646	646	682	765	3,100	4,000
Tourist overnights	**11,899**	**6,700**	**6,499**	**6,407**	**7,329**	**7,334**	**6,762**	**6,414**	**6,645**	**14,500**	**18,500**
Domestic	10,384	5,900	5,295	5,392	5,853	5,935	5,293	4,961	5,002	7,500	9,500
Foreign	1,516	800	1,204	1,015	1,476	1,399	1,469	1,452	1,643	7,000	9,000
Average pay (Neto in EUR)	**n.a.**	**182**	**203**	**276**	**328**	**366**	**334**	**318**	**365**	**450**	**600**

Adapted from: (Statistical Office of the Republic of Serbia, 2013) (Official Gazzette of the Republic of Serbia, 2006)

Note: Data from 1989 include tourist data for regions of Vojvodina, Central Serbia and Kosovo, and view tourists from all ex Yugoslavian territories as domestic. Data from 2004 onwards, as well as projections for 2015 include tourist data for Vojvodina and Central Serbia, and view only these tourists as domestic.

Many tourism destinations have found themselves in a declining domestic demand situation at some point: Britain during the mid-80's and more specifically Eastern European countries such as Poland, Czechoslovakia, Bulgaria and the German Democratic Republic (now part of Germany), after the fall of the Iron curtain. (Bresler, 2011 Volume 15, Issue 2). We can argue that in 2009. "Iron curtain" fell down for Serbia, since it was the first time from 1992 that the Serbian "captive market" could travel freely in the EU Schengen area. Bresler proposes Packaged tours as a way of promoting and nurturing the culture of domestic travel, the same way it was done in the Eastern European countries after the fall of the Iron curtain. Package tour is an effective tool for providing convenience, pshychological and financial security to the first-time buyers with limited income. (Bresler, 2011 Volume 15, Issue 2)

Characteristics of the Serbian tourism market and international experiences with tourism strategy formulation

In the work of Armenski, Zakic and Dragin, research has been done in Belgrade and Novi Sad in order to investigate both supply and demand side of the Serbian tourism market. In Belgrade, when the question was what did they like the most, 29,5% of tourists pointed out historical values as the most important, while only 12,5% pointed out nightlife. Although the category in the survey was rather narrow-cultural monuments only, it captures the satisfaction of tourist with cultural offer in Belgrade, more than with entertainment or nature. The same research during the Exit festival in Novi Sad revealed that Belgrade is the only destination that most (70%) of the people heard of, while only 30% heard about other destinations in Serbia. (Armenski, Zakić, & Dragin, 2009)

One third of the global accomodation capacity is registered in the EU, and one in three world tourists comes from the EU. However, this does not mean that tourism as an industry has a special place in the european policy. Tourism industry, in the Europen Commission, is under the jurisdiction of the Directorate General for Enterprise and Industry. (Mehter & Sevcan, 2012 Vol. 7 No. 1)

As Maitland suggests, generic strategies, such as development of international museums and galleries, can lead to some degree of standardization. That's why off the beaten tracks can offer added value to the tourists, as they provide authentic insight into everyday life of the local population. They offer somewhat more romantic, imaginative view of the local population in the perception of tourists. The imagined tourist perceptions are just as true as the real ones. (Maitland, 2010)

Development of tourism based economy in a post-industrial society is a multifaceted task. As Di Domenico S. and Di domenico C. have pointed out on the case of Dundee, over-reliance upon singular concept or predominantly consumption based strategies such as retail can be vulnerable to outside competition in the long run. (Di Domenico & Di Domenico, 2007) In that sense, Murphy and Boyle have developed a conceptual model for depicting the complex relations in the process of strategic cultural tourism development in a post-industrial city. It was based on the Glasgow's experience in cultural tourism development. However, as evidenced in the prominent cultural figures interviews, the perspectives of single actors were rather opportunistic, and not strategic. (Murphy & Boyle, 2006) It is an example of the successfull strategy viewed as a learning process. Mintzberg, Ahlstrand and Lampel recognized that strategies emerge as a consequence of many small actions and decisions made by many different people. Moreover, informed individuals on all levels of hierarchy can give their contributions to the strategic process. (Mintzberg, Ahlstrand, & Lampel, 1998)

Research conduted by Najdic has found that the EU Schengen visa liberalisation for Serbian citizens in 2009 has had no major impact on the decision of Serbian tourists where to travel. However, 17.9% of tourists did say that it did affect their decision where to travel, which is a considerable figure. Economic crises has caused a general decrease of leisure travels from Serbia, and it primarily affected domestic destinations in Serbia and in neighbouring Montenegro on the Adriatic coast. The favourite destinations of Serbian tourists are: Montengro 30%, Greece 26%, and Serbia itself 16%. (Najdic & Sekulovic, 2012) In 2009., a 4 year positive trend in domestic tourist arrivals and overnights has been stopped, from which Serbian tourism has not yet recovered. This negative trend is probably a mixture of economic recession in Serbia, which led to households spending less on travel, and potential substitution of every 5th domestic leisure travel in favour of the European Union destinations. As Pearce and Schott evidenced in their research, New Zealands domestic market also suffered from substitution of domestic destinations with

foreign ones in the last decade. This trend has also been recognized by the New Zealand government. (Pearce & Schott, 2011 Vol. 5 No. 2)

Serbian tourism offer is fairly rich due to the geographic characteristics of the terrain (rivers-most notable being the Danube, lakes, mountains), and diversity of cultures with central european and mediterranian/oriental cultural heritage, wich makes niche marketing suitable for Serbian tourism. Its core strengths are diversity and mixture of Central European and Mediterranian/Oriental cultures. However, as Kozak and Baloglu notice, destinations with diverse products and services have to be able to package them as tourism products bring them to the market in order to be successfull. (Metin Kozak, 2011)

Consumer behavior and market segmentation

Consumer behavior can be rational or irrational, in the sense that it is susceptible to messages (and values) from the reference groups and media. It can be motivated by opportunism or stopped by unforeseen circumstances. It can be influenced by marketing campaigns such as last minute offers. Consumers sometimes also engage in consumer misbehavior. This is why a legal infrastructure (or system) is an essential prerequisite for all marketing activities.

Tourists, or tourist consumers, demonstrate a high level of involvement and commitment in the service delivery process, while the service is in its very nature intangible. (Sayed, 2010) There are many different factors influencing consumer behavior in all industries, as well as their spending habits. Kotler identified as many as 15 factors that influence consumer behavior, and divided them into 4 groups: 1. Cultural (Culture, Subculture, and Social class), 2. Social (Reference groups, Family, and Roles and status), 3. Personal (Age and lifecycle stage, Occupation, Economic situation, Lifestyle, and Personality and self-concept), and 4. Psychological (Motivation, Perception, Learning, and Beliefs and attitudes). (Philip Kotler, 2006) In contrast, Swarbrooke and Horner propose a tourism consumer behaviour classification with as many as 22 factors, divided in 6 cathegories: 1. Physical, 2. Cultural, 3. Status, 4. Personal Development, 5. Personal, 6. Emotional, and 7. Physical. (Swarbrooke & Horner, 2007)

In this study, factors that were analyzed according to the clasification proposed by Kotler, were: Personal (Age and lifecycle stage, Lifestyle-through daily spending and length of stay) and Psychologial (Motivation).

Analysis of markets of origin of tourits is important, because there are ceratin characteristics shared by groups from certain regions. Apart from market segmentation, Christou and Savariades propose use of ethnographic techniques to profoundly explore the factors influencing the satisfaction levels, and bring to surface new information as an input for the marketing system. (Prokopis Christou, 2010)

Bjork and Jansson segmented the Finish and Swedish market into three groups according to how much a habitual decision making influences the decision making process. Essentially, the consumers with habitual behavior tend to use less new information prior to a decision and reach decision faster, compared to non-habitual consumers. "When to go" is the most habitual sub-decision (2,945) followed by "where to go" (3,066) and "what to do" (3,315). "How to travel" is the least habitual sub- decision (3,667). A more fine-grained analysis shows that the two very habitual travel decisions are to take a vacation during summer time (1,820) and to have a leave at approximately the same time of the year (2,270). (Bjork Peter, 2008)

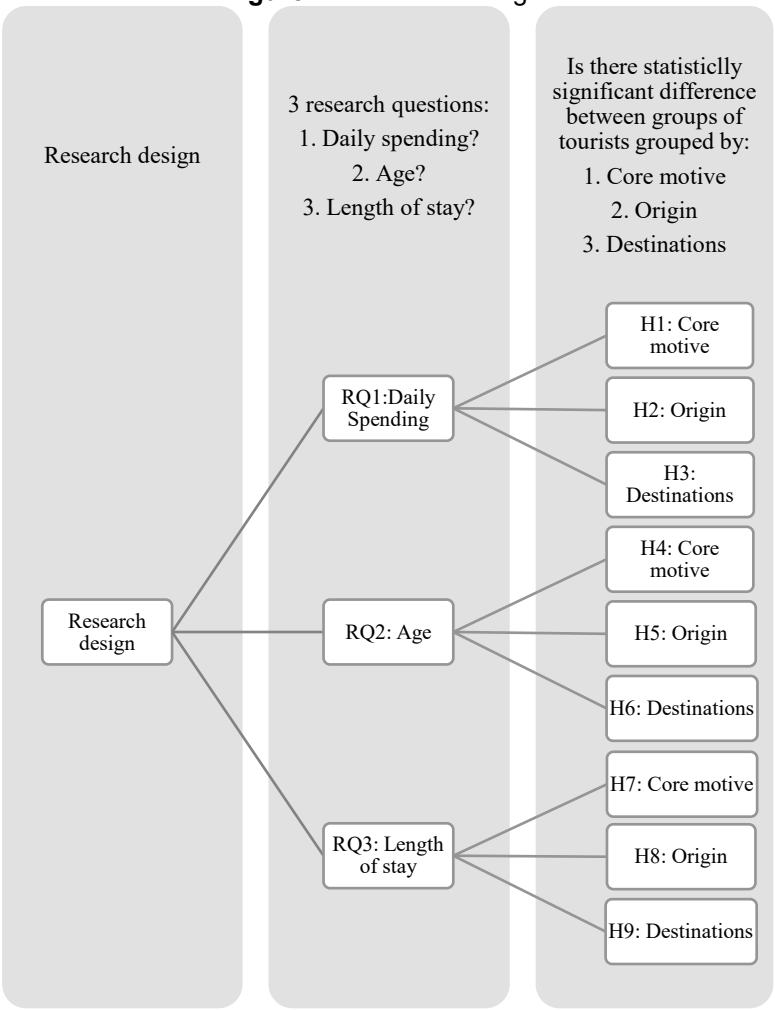
Contemporary market segmentation has to take into account the growing role of women in tourism decision aking and increased integration of marginalized groups into mainstream socio-economic developments. As Barles noted, destinations should align research, product development and promotion efforts to account for the growing power of women in purchasing decisions in Spain and in Europe. (Jose, Rafael, & Elena, 2010) Contemporary destinations design special guides for marginalized groups such as gay population and disadvantaged persons. A good practice example in that direction is the city of Seville, which published “”Guide to Accessible Tourism in Seville. Seville, Open to Everyone.”, as well as “Guide for Gay Tourism”. (Diez, 2011) As an be seen in this examples, the role of the Destination Management Organization can be very important in discovering all the market segments it serves, however small they are, and serving them in the best possible way.

RESEARCH DESIGN

The research was designed to answer 3 simple questions:

1. How much tourists spend daily in Serbia?
2. What is the age of tourists in Serbia?
3. For how long do tourists stay in Serbia?

Figure 1. Research design



All 3 questions were then posed to different tourism market segments regarding both supply and demand criteria:

1. Core motive for travel (Pleasure, Fun& Entertainment, Nature, Culture, Sport& Adventure, Health, and Business)

2. Origin of tourist (Domestic, Western Europe and the rest of the World, Central Eastern Europe, Ex-Yugoslavia, Expatriates/Emigrants)

3. Major tourism destinations (Belgrade, Novi Sad, Nis, Kopaonik, Zlatibor&Western Serbia)

Nine pairs of the null and alternate hypothesis were created in order for the null hypothesis to be tested. The statistical test was the one-way ANOVA (Analysis of Variance) in the SPSS software, with post-hoc Tukey test. The goal was to test for statistical significance in the data originally organized in a Randomized Block Design.

In order to better understand the full relations between the supply and demand market segments, the study concentrated also on calculating the market shares of each one of the market segments.

COLLECTION OF THE DATA

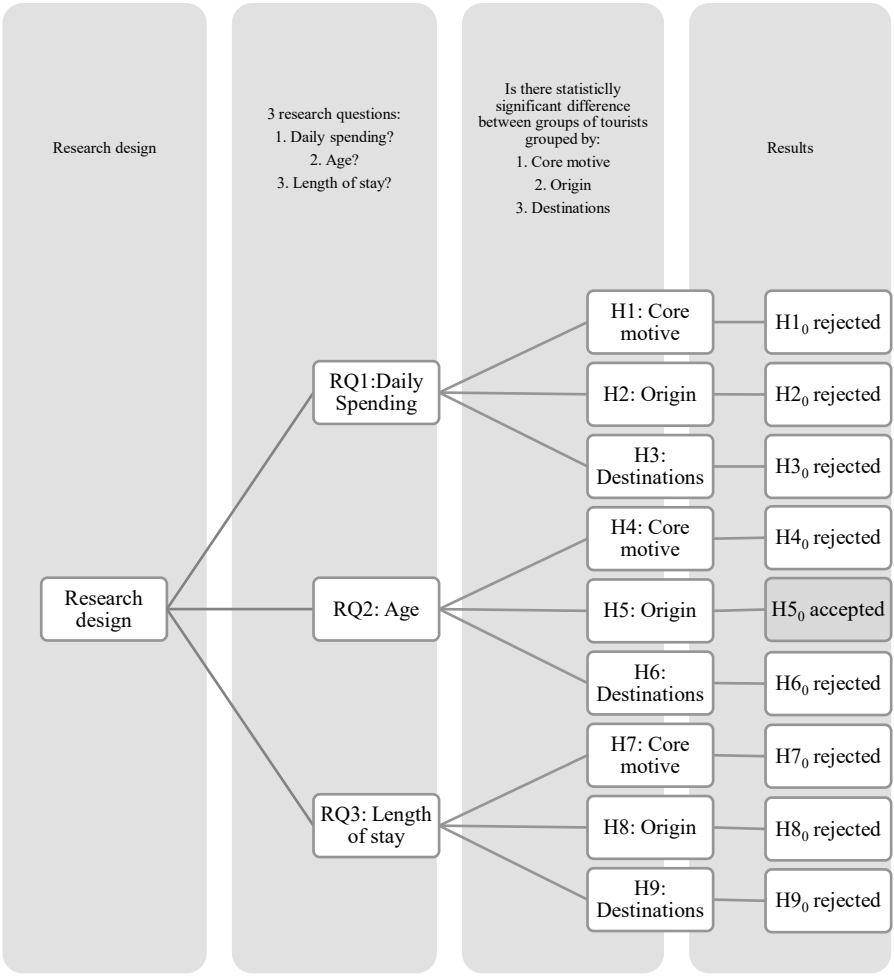
The data was collected through conducting Serbia Guest Survey 2011. The survey has been conducted as a component of the EU financed project: "Support to implementation of the National Strategy for Tourism", and produced a large amount of data, of which only one portion is used in the presented study. The objectives of the survey were to assess tourist profiles, core motives for travel, booking habits, expenditures, satisfaction and image perception of Serbia.

Total sample was 1500 respondents on the following locations in Serbia: Belgrade, Novi Sad, Zlatibor, Guca, Kopaonik, Fruska Gora, Zasavica, Vrdnik, Erdevik, Sremska Mitrovica, Divcibare, Valjevo, Banja Vrujci, Sokobanja, Vrnjacka banja, Banja Koviljaca, Niska banja, Nis, Subotica, Vrsac, Palicko jezero, Belocrkvanska jezera, Srebrno jezero, Ecka, Skorenovac.

The fieldwork was done only for the summer season: from July 11 2011 to September 5 2011.

REPORT OF FINDINGS

Figure 2. Report of Findings



Testing hypothesis H1

The null and alternate hypothesis were created in order to test the hypothesis H1:

$H1_0$: There is no statistically significant difference between 7 groups of tourists grouped by core motive for travel, in terms of mean daily spending.

$H1_A$: There is statistically significant difference between 7 groups of tourist grouped by core motive for travel, in terms of mean daily spending.

Table 3. Testing hypothesis H1

ANOVA
Spending

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	105762.292	6	17627.049	6.589	.000
Within Groups	3983203.229	1489	2675.086		
Total	4088965.521	1495			

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=6.589 was greater than the critical value of 2.8, at the 0.01 significance level. The null hypothesis H10 was thus rejected, and alternate hypothesis H1A was accepted as true.

Testing hypothesis H2

The null and alternate hypotheses were created in order to test the hypothesis H2:

$H2_0$: There is no statistically significant difference between 7 groups of tourists grouped by core motive for travel, in terms of mean age.

$H2_A$: There is statistically significant difference between 7 groups of tourist grouped by core motive for travel, in terms of mean age.

Table 4. Testing hypothesis H2

ANOVA
AgeGroup

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	39960.715	6	6660.119	42.746	.000
Within Groups	232777.373	1494	155.808		
Total	272738.089	1500			

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=42.746 was greater than the critical value of 2.8, at the 0.01 significance level. The null hypothesis H20 was thus rejected, and alternate hypothesis H2A was accepted as true.

Testing hypothesis H4

The null and alternate hypothesis were created in order to test the hypothesis H3:

$H3_0$: There is no statistically significant difference between 7 groups of tourists grouped by core motive for travel, in terms of mean length of stay.

$H3_A$: There is statistically significant difference between 7 groups of tourist grouped by core motive for travel, in terms of mean length of stay.

Table 5. Testing hypothesis H3

ANOVA
LengthGroup

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	164.550	6	27.425	25.088	.000
Within Groups	1633.153	1494	1.093		
Total	1797.703	1500			

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=25.088 was greater than the critical value of 2.8, at the 0.01 significance level. The null hypothesis H30 was thus rejected, and alternate hypothesis H3A was accepted as true.

Testing hypothesis H4

The null and alternate hypothesis were created in order to test the hypothesis H4:

$H4_0$: There is no statistically significant difference between 5 groups of tourists grouped by region/country of origin, in terms of mean daily spending.

$H4_A$: There is statistically significant difference between 5 groups of tourists grouped by region/country of origin, in terms of mean daily spending.

Table 6. Testing hypothesis H4

ANOVA
ExpendGroup

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	1158.500	4	289.625	78.125	.000
Within Groups	5553.381	1498	3.707		
Total	6711.882	1502			

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=78.125 was greater than the critical value of 3.32, at the 0.01 significance level. The null hypothesis H40 was thus rejected, and alternate hypothesis H4A was accepted as true.

Testing hypothesis H5

The null and alternate hypothesis were created in order to test the hypothesis H5:

$H5_0$: There is no statistically significant difference between 5 groups of tourists grouped by region/country of origin, in terms of mean age.

$H5_A$: There is statistically significant difference 5 groups of tourists grouped by region/country of origin, in terms of mean age.

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=3.145 was lower than the critical value of 3.32, at the 0.01 significance level. The null hypothesis H50 was thus accepted as true.

Table 7. Testing hypothesis H5

ANOVA

AgeGroup

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	23.811	4	5.953	3.145	.014
Within Groups	2831.918	1496	1.893		
Total	2855.730	1500			

Testing hypothesis H6

The null and alternate hypothesis were created in order to test the hypothesis H6:

$H6_0$: There is no statistically significant difference between 5 groups of tourists grouped by region/country of origin, in terms of mean length of the trip.

$H6_A$: There is statistically significant difference between 5 groups of tourists grouped by region/country of origin, in terms of mean length of the trip.

Table 8. Testing hypothesis H6

ANOVA

LengthOfStay

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	52.306	4	13.076	11.136	.000
Within Groups	1756.620	1496	1.174		
Total	1808.926	1500			

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=11.136 was greater than the critical value of 3.32, at the 0.01 significance level. The null hypothesis H60 was thus rejected, and alternate hypothesis H6A was accepted as true.

Testing hypothesis H7

The null and alternate hypothesis were created in order to test the hypothesis H7:

$H7_0$: There is no statistically significant difference between tourists on 5 major destinations, in terms of mean daily spending.

$H7_A$: There is statistically significant difference between tourists on 5 major destinations, in terms of mean daily spending.

Table 9. Testing hypothesis H7

ANOVA

ExpendGroup

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	244.736	4	61.184	14.379	.000
Within Groups	3535.986	831	4.255		
Total	3780.722	835			

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=14.379 was greater than the critical value of 3.32, at the 0.01 significance level. The null hypothesis H70 was thus rejected, and alternate hypothesis H7A was accepted as true.

Testing hypothesis H8

The null and alternate hypothesis were created in order to test the hypothesis H8:

$H8_0$: There is no statistically significant difference between tourists on 5 major destinations, in terms of mean age.

$H8_A$: There is statistically significant difference between tourists on 5 major destinations, in terms of mean age.

Table 10. Testing hypothesis H8

ANOVA

AgeGroup

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	89.759	4	22.440	13.574	.000
Within Groups	1380.408	835	1.653		
Total	1470.167	839			

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=13.574 was greater than the critical

value of 3.32, at the 0.01 significance level. The null hypothesis H80 was thus rejected, and alternate hypothesis H8A was accepted as true.

Testing hypothesis H9

The null and alternate hypothesis were created in order to test the hypothesis H9:

$H9_0$: There is no statistically significant difference between tourists on 5 major destinations, in terms of mean length of stay.

$H9_A$: There is statistically significant difference between tourists on 5 major destinations, in terms of mean length of stay.

Table 11. Testing hypothesis H9

ANOVA

LengthOfStayGroup

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	31.353	4	7.838	6.749	.000
Within Groups	970.973	836	1.161		
Total	1002.326	840			

One way ANOVA (Analysis of Variance) was used as the test statistic. The calculated value of F=6.749 was greater than the critical value of 3.32, at the 0.01 significance level. The null hypothesis H90 was thus rejected, and alternate hypothesis H9A was accepted as true.

Market shares for core motivations for travel, regions of origin and destinations

Market shares were calculated for each group separately according to the formula:

Market share = (average length of stay x average daily spending x sample size)/total

The calculated values were:

- Core motivation for travel (Pleasure 34%, Fun & Entertainment 18%, Nature 13%, Culture 3%, Sport & Adventure 4%, Health 10%, and Business 15%)
- Region of origin (Domestic 53%, Western Europe and the rest of the world 19%, Central Eastern Europe 7%, Ex-Yugoslavia 8%, Expatriate/Emigrant 13%)

- Destinations (Belgrade 22%, Novi Sad 5%, Nis 7%, Kopaonik 19%, Zlatibor 13%, Other 34%)

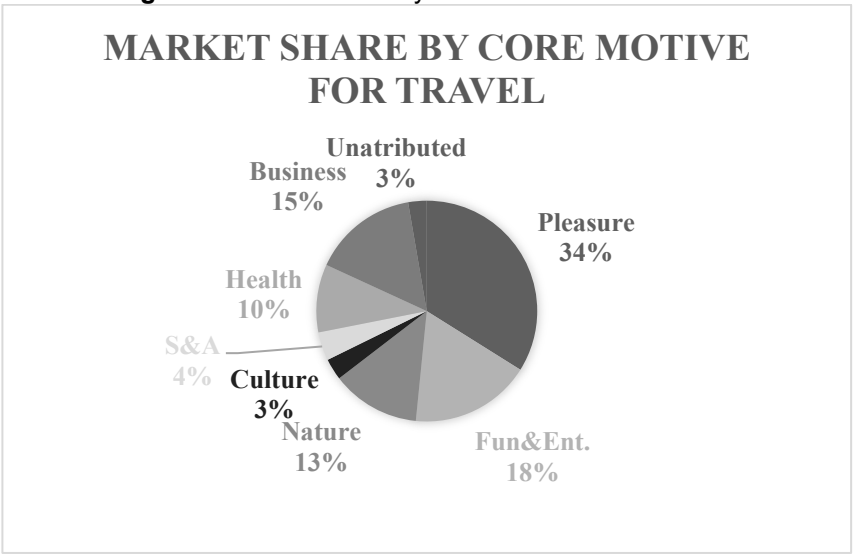
ANALYSIS OF FINDINGS

Regarding the hypothesis testing of the null hypothesis $H1_0$,$H2_0$,$H3_0$,$H4_0$,$H5_0$,$H6_0$,$H7_0$,$H8_0$, and $H9_0$; only the hypothesis $H5_0$ has been accepted. All other null hypothesis were rejected and alternate $H1_A$,$H2_A$,$H3_A$,$H4_A$,$H6_A$,$H7_A$,$H8_A$,$H9_A$ hypothesis were accepted as true.

Since all of the nine hypothesis included comparing 5 or more groups at the same time, a post-hoc Tukey tests were executed, in order to observe the mutual relationships between groups. Cluster analysis was excluded as a method of analysis because the integral table with data regarding all attributes was not available to the author. These tables were separated early on in the analysis process. The findings can be grouped into three sections: 1. Core motive for travel, 2. Major Serbian destinations, 3. Regions/countries of origin.

Core motive for travel analysis of findings

Figure 3. Market share by core motive for travel



- The 7 core motives for travel can be clustered into three separate groups by age, with statistically significant differences between groups: 1 Younger (Sport, Fun& Entertainment), 2 Middle aged (Pleasure, Business, Culture, Nature), 3 Older (Health). This was the only criteria that clustered the whole market with 7 core motives for travel into 3 clear cut groups, which are both mutually exclusive and collectively exhaustive.

Table 12. Segmentation of core motives for travel by age

AgeGroup

Tukey HSD[a,b]

		Subset for alpha = 0.01		
Motive	N	1	2	3
Sport	46	26.3043		
Fun&Entertainment	310	29.3742		
Pleasure	558		36.9382	
Business	134		37.4440	
Culture	46		38.2826	
Nature	252		39.3810	
Health	155			46.9677
Sig.		.558	.791	1.000

- Sport& Adventure and Health form a cluster with the length of stay which is statistically significantly higher than that of any other group.

Table 13. Segmentation of core motives for travel by length of stay

LengthGroup

Tukey HSD[a,b]

		Subset for alpha = 0.01		
Motive	N	1	2	3
Culture	45	1.6667		
Fun&Entertainment	311	1.7717	1.7717	
Business	135	1.7926	1.7926	
Nature	253	2.1621	2.1621	
Pleasure	557		2.1688	
Sport&Adventure	45			2.7333
Health	155			2.8581
Sig.		.012	.089	.978

Region/country of origin analysis of findings

Figure 4. Market share by region of origin

Table 14. Clustering regions of origin of tourists by Daily Expenditures

ExpendGroup

Tukey HSD[a,b]

OriginRegion	N	Subset for alpha = 0.01		
		1	2	3
Domestic	1160	4.5164		
Ex-Yugoslavia	100		5.9900	
Expatriates/emigrants	77		6.1818	
Central Eastern Europe	74		6.5405	6.5405
W. Europe and rest of the world	92			7.3478
Sig.		1.000	.239	.022

- Domestic tourists have statistically significant lower daily spending from all other groups of tourists regardless of the region of origin.
- Expatriates/Emigrants have longer length of stay with statistical significance, from all other tourists in Serbia, regardless of their region of origin.

Table 15. Clustering regions of origin of tourists by length of stay

LengthOfStay

Tukey HSD[a,b]

OriginRegion	N	Subset for alpha = 0.01	
		1	2
Domestic	1160	2.0672	
Central Eastern Europe	73	2.1233	
Ex-Yugoslavia	97	2.1237	
W. Europe and the rest of the world	93	2.2688	
Expatriates/Emigrants	78		2.8974
Sig.		.668	1.000

Major Serbian tourist destinations analysis of findings

- Tourists visiting Belgrade have statistically significant higher daily spending from tourists on all other major tourist destinations in Serbia.

Table 16. Market shares of major tourism destination

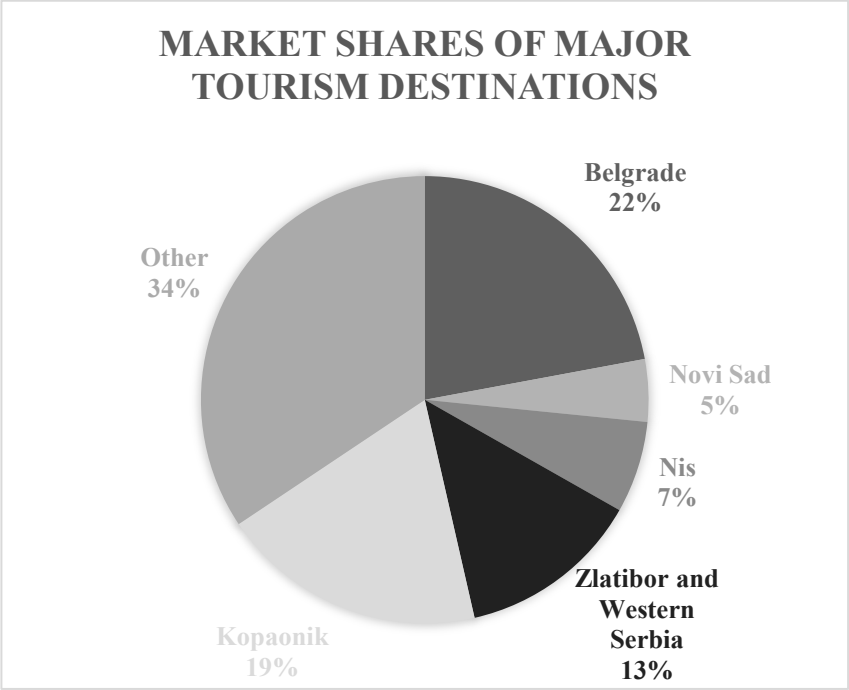


Table 17. Clustering tourism destinations by daily expenditures

ExpendGroup

Tukey HSD[a,b]

Destination	N	Subset for alpha = 0.01	
		1	2
Novi Sad	74	4.5405	
Niš	113	4.6903	
Zlatibor and W Serbia	227	5.1013	
Kopaonik	208	5.1635	
Belgrade	214		6.1308
Sig.		.090	1.000

CONCLUSIONS AND RECOMMENDATIONS

The Serbian tourism market is very rich in small niches on both supply and demand side of the market. This study attempted to demonstrate the important differences these groups of tourists do exhibit in terms of key behavioral traits. Tourism policy should address the identified groups of tourists with specially designed marketing and communication strategies, appropriate to the tourist's needs and attitudes.

As a continuation of the Serbia Guest Survey 2011, another survey should be conducted during winter season. The questionnaire should also include the secondary motivation for trip in order to better understand motivation for trip. The data from EUROBAROMETER show that culture is a strong secondary motivator for visits, especially for city tourism. (World Tourism Organization and European Travel Commision, 2005)

Apart from only city tourists, all groups of tourists are most likely to be influenced by multiple motivations. Every tourists and potential tourist is influenced by multiple motivators in the process of buying and consuming the service, and is always balancing these multiple motivations. (Swarbrooke & Horner, 2007)

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