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Foreign Tour Operators and Travel Agents Knowledge of a Potential Tourism Destination: The Vojvodina Region of Serbia

Ivo Mulec
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Vojvodina is an autonomous region of Serbia, and has the potential to become a successful tourism destination. Twenty years of changes have elapsed since the disintegration of Yugoslavia, and destination planners in Vojvodina are now looking to accommodate visitors and generate service related jobs. The method for collecting data was through survey responses from those in the travel industry. The objective for conducting this research is to analyze the knowledge and awareness of the developing destination of Vojvodina. From here, it is possible to get a sense of the region's awareness, and role tour operators and travel agents act as opinion makers in promoting destinations to their clientele. Results suggest that Vojvodina is not known as a tourism destination among foreign travel experts; furthermore, this would suggest that their clientele base is not informed of this region of Serbia as a tourism destination. Although not known, this is better than having a negative image. With a non-image, tour operators and travel agents then have the ability to creatively market and promote an image that will generate further awareness of the Vojvodina region as an emerging tourism destination.

Key Words: destination awareness, destination image, destination knowledge, Vojvodina region

JEL Classification: R, Y, Z

Introduction

Tourism is a growing service sector industry around the world, and travel agents and tour operators offer a myriad of organized travel itineraries to meet consumer trends and demands. Tourism represents a nascent economic paradigm shift as countries see reductions in agriculture, mining, and heavy production (Holmes 2001). Moreover, the tourism industry is 'one that has been pivotal for the creation of new markets' (Holmes

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2001, 177). Many countries, regions, and cities offer a host of destinations that are quite reputable or well-known. Many well-visited destinations have successfully succeeded in developing an image that is recognized internationally. For instance, many venture to New Zealand to take advantage of the ubiquitous adventure tourism opportunities, while others stop in Paris to gaze upon the Eiffel Tower. Such promotions as adventure tourism or iconic features in the landscape have forged touristic identities of these places and have oriented destination images and international awareness (see, for example, Cartier and Lew 2005; Goulding and Domic 2009; Kneesel, Baloglu and Millar 2010; Morgan, Pritchard and Pride 2010; Upshaw 1995). However, some places around the world struggle to develop a tourism industry due to the lack of awareness. In some instances, newer destinations that are unable to attract sufficient numbers of tourists often struggle to compete with well established or notable (i. e. well-branded) destinations (Urry 2002). For certain places to become competitive tourism destinations, knowledge must be mediated by tourism experts, tour operators, or travel agents. When a reputable image has been forged an emerging destination must commence popular marketing strategies to promote awareness; tourism experts, operators, and agents must further promote the destination to potential tourists and visitors.

This paper focuses on the case of the Vojvodina region of Serbia. This study uses data from a web-based survey concerning image and awareness of Vojvodina as a tourism destination. Vojvodina is an autonomous region, located in the northern part of Serbia. Physiographically, Vojvodina is situated in the southern section of the Pannonian lowland. In terms of area, this region covers over 21,500 square kilometers and has approximately 2 million inhabitants. The region is also one of the most ethnically eclectic places in Europe, with more than 30 different ethnic groups of people living together, and with seven official languages spoken in the region's parliament. Culturally, Vojvodina has always been known as a granary, with agriculture being the most important source of income of the majority of its inhabitants. It must be noted that many changes have occurred since the 1990s. Apart from drastic political, social, and demographic changes, the region has experienced economic restructuring as well. Agriculture, although still an important sector of the region's economy, has seen drastic declines. As a result, many of the younger cohorts of the population are departing rural areas and seeking service oriented employment in towns and cities, resulting in a depopulation of rural areas.

In order to reduce rural to urban migrations, investments in developing rural tourism activities represent a chance for many of the younger population to find a job in their respective rural areas without being forced to leave.

Currently, tourism in the Vojvodina region of Serbia is composed primarily of day visitors travelling aboard international river cruise ships along the Danube River, and generally stopping at two ports in Serbia, Novi Sad and Belgrade. Novi Sad has a long tradition of hosting many domestic and international meetings, incentives, conventions, and exhibitions; this is often regarded as MICE tourism. Apart from Novi Sad in the Vojvodina region, smaller towns such as Sombor, Subotica, and Palić are commencing further tourism developments, which initially attracted cyclists. Additionally, Orthodox followers would host pilgrimages to visit Fruška Gora, considered a holy mountain. Little academic research has been done and published on the Vojvodina region of Serbia. Recent academic literature concerning tourism in this region has focused on, for example, undeveloped regions in rural areas (e. g. Todorović and Bjeljac 2009), hunting tourism (e. g. Ristić et al. 2010), and associations of resource exploitation (e. g. Košić et al. 2011). However, what is missing from this discourse is research that deals with image and destination awareness of the region.

The purpose of this research is to analyze destination awareness and knowledge of the Vojvodina region of Serbia among foreign tour operators and travel agents. This work shows that emerging destinations, minimally recognized, can be of interest to tour operators whose clientele seek nascent destinations. The framework of this paper begins by reviewing the literature focusing on destination image and awareness to position an appropriate framework that conceptually aligns this case-study. The methodology section puts into perspective how surveys were administered and important questions addressed to travel consultants. Thereafter, the results section provides the statistical analysis of the survey followed by exploratory findings and discussion. The final section offers concluding remarks and observes directions for future research.

Destination Image and Destination Awareness

Hennessey et al. (2010, 218–19) note, ‘given the ever-expanding number of tourism destinations and the increased supply of products and services, the competition for visitors is intense and bound to become

more so in the future.' With this context acknowledged, tourists are, now more-than-ever, able to choose from a growing number of places for traveling to. Tourism destinations are now often associated as brands, whilst tourists are the consumers (Keller, 2003). To become a successful and competitive tourism destination, all destinations must strategically promote specific location endowments that distinguish one place from another. In this regard, tourism experts, tour operators, and travel agents, in addition to independent travelers, acquire knowledge and awareness (Binns and Nel 2002; Kim and Perdue 2011). Therefore, destination knowledge comprises two core components: destination image and destination awareness (see Cai 2002; Keller 2003; Xiang, James and Yuan 2008).

Milman and Pizam (1995) suggest that a destination's image is promoted vis-à-vis what awareness tourists have of a place. Furthermore, to acknowledge Keller's (2003) conceptualizations, it is argued that for a specific tourism destination to be successful, tourists must have a well-known awareness of the destination and the place must possess a positive image (see also, Morgan, Pritchard and Pride 2010; Urry 2002). In many cases awareness is dependent upon a place's image, or the imagination of how people perceive places (Urry 2002; Wise 2011). In this regard, an image represents a vision (or an imagination) that may have been constructed during some point in the past (see for example, Barthel 1996; Cartier and Lew 2005; Govers, Go and Kumar 2007; Hernández-Lobato et al., 2006; Pan, 2011; Richards and Wilson, 2007). Places are also dependent upon positive perceptions, whilst negative visions often burden places, regions, or countries (see Winter 2008).

Moreover, destination image is often referred to as the visual or mental impression of a place (Milman and Pizam 1995). Impressions refer to attractions, uniqueness, the physical environment, accommodations, safety, public management, and user facilities (see also Reuland, Coudrey and Fagel 1985; Urry 2002), each intended to develop 'imagescapes' (see Wang 2005). Aligned with this regard, Hernández-Lobato et al. (2006) suggest that a 'tourism destination image is a mental schema developed by a tourist on the basis of impressions.' Subsequently, in Wise's (2011) study on Bosnia and Herzegovina and Croatia, for example, he addresses how past communications of places have forged imaginations, before alluding to the role of tourism as presented via newspaper and web-based content, (re)create images of places previously perceived negatively. Whilst much academic work addresses destination image and per-

ception, it is important to understand the effect image has on destination awareness.

The notion of destination awareness correlates with destination image, and can involve familiarity, but ultimately relies on a place's perceived image, attractiveness, and appeal (see Crompton 1992; Milman and Pizam 1995). As directly alluded to in Minman and Pizam's (1995) work, destination awareness represents a vital first step if an emerging tourism destination is to become successful. To reiterate: brand awareness, introduced above, refers to the knowledge people have of destinations (Konecnik and Gartner 2007). In order for the knowledge of a destination to be distributed, marketing campaigns must commence to strategically highlight place's strengths (Li, Lin and Chu 2008). Marketing awareness is also often carried out by tour-operators and travel agents to their respective markets (see Hennessey et al. 2010).

Although, and requisite of consideration, for tourists, travel agents, and tour operators to fully become aware of destinations generally absent from the tourist map, considerable media attention is needed to brand a place's image to an international audience (Milman and Pizam 1995; Pan 2011; Ritchie and Crouch 2003). In some instances, mega-events assist awareness endeavors (Ritchie and Crouch 2003), as can be considered the case with the 2008 Olympic Games hosted by China in Beijing (Gibson, Xueqing and Zhang 2008). Other strategies surrounding destination awareness promotions are carried out in well-established destinations; for example, Montana in the United States promotes/markets the natural beauty of their state in Seattle, Washington, which is already an internationally renowned destination. Such strategies surrounding destination awareness relate back to destination knowledge. Therefore, mental schema involved in producing touristic knowledge involve branding place images to generate a distinctive imagination (Ashcraft 2002; Keller 2003; Kneesel, Baloglu and Millar 2010; Wise 2011; Xiang, James and Yuan 2008).

According to Xiang, James and Yuan (2008, 82) 'destination awareness is not simply whether consumers have heard about a destination, but the likelihood the destination will appear in tourists' destinations choice set,' when identifying places to visit. However, among the problems that often arise, as Milman and Pizam (1995, 22) have suggested, is that 'awareness may not always lead to an interest in the product [being offered] or to purchasing behavior.' Furthermore, different brands, or products (i. e. destinations), vary in awareness in terms of both their depth and breadth

(see for example, Keller 1998; Hoeffler and Keller 2002). Hennessey et al. (2010) see awareness relative to intentions for travelling to a destination. Higher depth, or awareness of a certain destination, likely means that potential tourists may consider one certain destination over others when travel planning. The breadth of destination awareness represents the broad range of traveling purposes, in which, then, other destinations may be considered (see Keller 1998).

Survey Method

Surveys are appropriate when the researcher intends to acquire a large amount of responses from a specifically intended, but relatively scattered population, as is the case with this study. The survey concerning the image and destination awareness of Vojvodina was prepared specifically for foreign tour operators and travel agents. This also included others employees working in the tourism industry, including travel agents and tour operators in all the former Yugoslav Republics, except for Serbia. The survey was written in English focusing on three sections. The first series of questions was set to obtain general information from the respondents regarding gender, age group, place of work and business activities, period of time they have been working in the tourism sector, educational level, and finally their country/state/region of origin. Part two of the survey was dedicated to the respondents' travel experience and interests. These questions were focused on how many times each year they travel abroad, purpose of travel, when travelling for leisure what their prime motive of travel is, and when travelling to a new destination, while travelling for leisure, what they consider of top priority when selecting a destination.

The third section's set of questions were aimed at gaining insight into Vojvodina's image and awareness as a potential tourism destination. Preceding the questions included on the actual survey was a brief introduction of the Vojvodina region, presenting key information concerning the region's most important endowments and resources. This introduction briefly narrated the history, geography, and culture of Vojvodina. One part also mentioned that Vojvodina is an autonomous region of the Republic of Serbia, underlining some most important tourist attractions and facts that might attract tourism to the region. It was also noted that Vojvodina is an integrated part of Serbia, and is seldom represented as an independent tourism destination. Also, in the introduction to the survey respondents were assured that their responses to the survey would be confidential and only the general results would be published.

This survey was conducted between March and April, 2010, active online through the web site: www.e.SurveysPro.com. Using an online survey proved most beneficial due to requests sent around the world. In order to acquire accurate results regarding destination image and awareness, respondents were requested to respond only once from their e-mail address. E-mails with direct links to the survey were sent to 600 e-mail addresses. Of the 600 questionnaires sent out, 162 were returned, of which 161 were usable, accounting for a 27 percent response rate. The respondents came from thirty-eight different countries around the globe. The largest number of respondents, forty-three, came from Slovenia, followed by thirteen from Croatia and Norway, nine from Italy and Sweden, six from Iceland and Finland, five from Albania and the United Kingdom, four from the United States, three from Canada, Czech Republic, France, Greece, the Netherlands, Poland, and Portugal, two from Australia, Brazil, Denmark, India, Macedonia, Philippines, and South Korea, and one from Austria, Bosnia and Herzegovina, Bulgaria, Cyprus, Estonia, Ethiopia, Iran, Israel, Morocco, New Zealand, Romania, Taiwan, Turkey, and Uzbekistan.

Survey Results

As a result of the initial questions, out of the total 161 respondents comprising the data used in this research, sixty-one percent were female and thirty-nine percent male. The respondents were divided into four age cohorts, the most represented being fifty-one years and over, with twenty-nine percent, followed by twenty-seven percent from the next most represented cohort being between thirty-one to forty years old, twenty-five percent were from the forty-one to fifty years cohort, and nineteen percent represented the youngest cohort, aged twenty-one to thirty. The majority of the respondents, fifty-six percent, were tourist agency or tour operator managers, seventeen percent were hospitality sector managers, six percent worked in government offices or were public administration employers, four percent from transportation companies, and the remaining seventeen percent from selected other occupations. Regarding the length of time employed in the industry, the returned sample showed thirty-nine percent of respondents are tourism stakeholders who had been working in different sectors of the tourism industry for less than ten years, twenty-nine percent of them have been in the industry eleven to twenty years, sixteen percent from twenty-one to thirty years, and sixteen percent have worked in the industry for over thirty-one years. Based

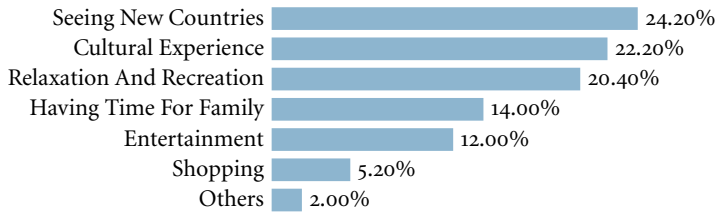


FIGURE 1 Prime motives for travelling abroad for leisure and holidays among English speaking respondents

on education – the majority, thirty-nine percent – of respondents had completed college or university levels of education, twenty-seven percent hold masters degrees, and nine percent received a PhD, while the remaining twenty-five percent completed secondary or professional level education. Based on these respondents' results, the majority of participants who completed the survey are female, and the majority of the total respondents' have been working in the tourism industry less than ten years. A promising indicator is the high educational level of the relatively mature population of respondents.

The second series of survey questions was directed towards respondents' travel experience. The objective for obtaining these data was aimed at getting an idea of their travel habits and their culture of travelling. It was found that the vast majority of them, forty-five percent, travel abroad more than five times a year, with twenty-nine percent of the respondents going abroad three to five times a year, twenty-six percent once to twice a year. Purposes for traveling abroad were sequenced into three primary motives, these being business trips, holidays, or general leisure trips (e. g. visiting friends and relatives). It was found from this sample that forty-three percent travel abroad during holidays, thirty-nine percent of them for business, and the remaining eighteen percent travel abroad to visit friends and relatives. The following question concerned prime motives for travelling abroad when travelling for leisure and holidays; the results are detailed in figure 1. The final question was concerned with participants' priorities when selecting destinations when travelling; these results are represented in the figure 2.

The final series of survey questions focused on image and awareness. Participants were first asked if they had already visited Serbia. Of the 161 respondents, sixty-one have previously travelled to Serbia and one-hundred respondents have never been to Serbia. The results were even lower for the same question, concerning previous visits to Vojvodina. Of

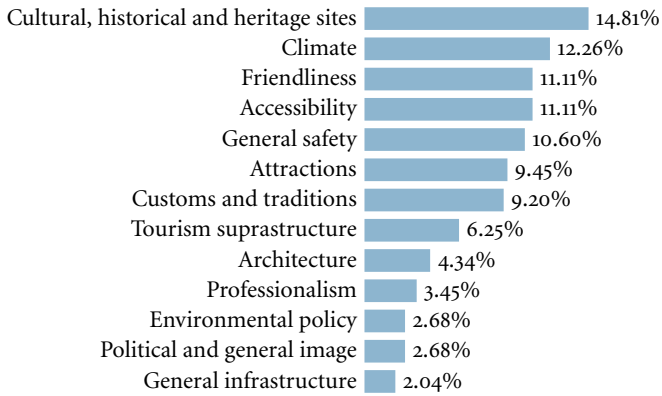


FIGURE 2 Priorities in the destination selection process among English speaking respondents

the sixty-one respondents who have visited Serbia, over half, thirty-eight, have been to the Vojvodina region.

Results from the survey found that, the majority, fifty-six percent, of the respondents considered Vojvodina as a part of Serbia, peaceful and stable, while five percent of them though it was not, and the remaining thirty-nine percent of respondents had no idea about this question. Similar results were given to the question of whether Vojvodina is a safe region for foreign tourists to visit. Regarding this query, sixty-one percent answered yes, only two percent said no, and thirty-seven percent did not know how to answer this question. Therefore the results of the next question regarding the image of Vojvodina as a potential tourism destination were subsequently similar. Thirty-four percent of respondents thought that the image of Vojvodina in their country was positive, ten percent thought it was negative, and 56 percent had no idea of how Vojvodina's image is perceived in their country. In terms of whether Vojvodina is an attractive and interesting destination, in addition to being good value for the money, fifty-three percent of the respondents answered positively, three percent reported negatively, and forty-four percent had no idea.

The following questions explored destination awareness concerning Vojvodina. Based upon these responses, only four percent reported that Vojvodina is known as being a tourism destination in their country, forty-two percent said that Vojvodina is little known, and fifty-four percent said this region was not known at all. In the following question, the objective was to gain insight into how respondents suggest that Vojvodina as a tourism destination could be promoted to attract foreign

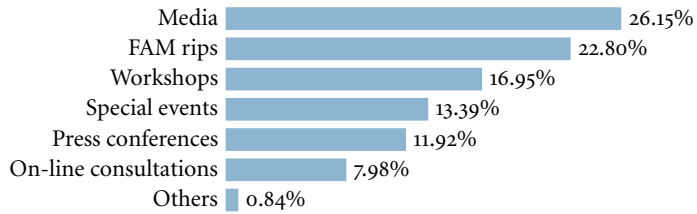


FIGURE 3 Suggested activities to promote Vojvodina as a tourism destination

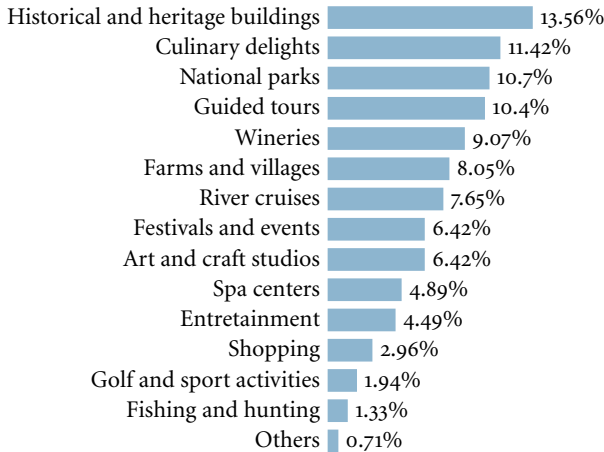


FIGURE 4 Tourism activities respondents would chose for Vojvodina

tourist from respondents' countries. These results are shown in figure 3.

Stimulating results were given to the question: would you like to come to visit Vojvodina for yourself? Seventy-six percent of respondents said yes, three percent mentioned no, and twenty-one percent had no idea. Encouraging results were reported for the question inquiring whether or not respondents would send their clients to Vojvodina. Based on these responses, forty-seven percent replied yes, seven percent listed no, and forty-six percent were undecided. The final question in this series was formulated according to the natural and created resources of Vojvodina and existing tourism products. The purpose of this lengthy list encouraged respondents to select among them; these results are presented in figure 4.

Exploratory Findings and Discussion

This paper analyzed the results of a web-based destination awareness and destination image survey for the potential and new tourism destination

of Vojvodina. Previous literature (e. g. Gibson, Xueqing and Zhang 2008; Kneesel, Baloglu and Millar 2010) indicated that destination images administered through survey responses provide much insight regarding people's general awareness of places, which corresponds to the case of Vojvodina. Through such inquiries, researchers can gain insight into how well destinations are known, and if known, how their image is conveyed to those residing outside the region (Gibson, Xueqing and Zhang 2008). In this exploratory study, it was important to seek responses regarding image and awareness to position how tour operators and travel agents perceive the region to draw some exploratory findings regarding their potential roles as opinion makers and marketers for presenting an emerging destination to travelers.

Some general findings from this study suggest that Vojvodina is not known as a tourism destination among foreign travel experts; furthermore, this would suggest their clientele base is not informed of this region of Serbia as a tourism destination. This likely stems from the results that show only one-quarter of the total respondents have personally visited Vojvodina, while the majority of others respondents have not. However, based on the relatively few respondents who have already visited the region, the majority of respondents who have not been to Vojvodina would like to visit, while only a few would prefer not to visit. Additionally, the remaining twenty-one percent were undecided. These initial questions offer much towards the interpretation of the region's awareness, and the role of those in the tourism industry as opinion makers who help shape opinions of tourists, as further explored below. Foremost, it could be presumed that their indecision was due to the lack of awareness of this destination, and not due to its negative image. While almost half of the respondents would send their clients to the destination, a few still noted they would not. Although most respondents answered whether or not they would send clients to Vojvodina, there was still a large number of respondents who did not answer this question. The high response rate of those who did not answer whether they would or would not send clients to Vojvodina suggests that there is a considerable lack of destination awareness among tour operators and travel agents.

As mentioned above, those in the tourism industry in many cases act as opinion makers. In light of such results from the survey, for a destination such as Vojvodina to become known, it is vital for knowledge of the destination that tour operators and travel agents become familiar with the region first. Milman and Pizam (1995) conclude that once tourists be-

come familiar with a place, then the overall image of the place increases, and they are able to further attract tourists. As is the case with Vojvodina, with which few are relatively familiar, tour operators and travel agents must first become aware and familiar with the region to persuade future tourists to visit the region. Then, tour operators and travel agents become the opinion makers, and take the lead towards influencing their clients to seek these relatively unexplored destinations by transmitting a positive image of the region to influence potential travelers. This fact can be explained as general, applicable to any developing destination around the world, not only regarding the case of Vojvodina. In addition, it is also relevant to suggest that non-image, or lack of a destination's awareness, as opposed to a negative image is potentially better for an emerging destination. This also plays along with tourism industry officials as opinion makers. Whilst negative images can be difficult to overcome, a destination without an image or an identity forging its existence, allows for creativity among those in the tourism industry to establish a destination's image. As Wise (2011) suggested, negative images can burden a place's reputation, non-image then gives a new destination an advantage towards building their tourism infrastructure and associated image from the ground up.

Supplemental findings from the data collected also suggest that the image of Vojvodina among foreign tourism experts is not negative. Vojvodina is only little known, or not known at all as suggested by the survey results. As noted above, one-third of the respondents believe that the image of Vojvodina is positive, while very few associate the region as displaying a negative image. However, the large majority of respondents could not report on their perception of Vojvodina's image. Based upon the analysis of responses to the survey, a lack of awareness regarding a destination is better in regard to the place's image than attempting to correct and overcome a negative image.

Based upon the literature addressed above, negative images can potentially burden a destination's image and tourism industry, especially when the place's image is associated with war and conflict. Specific to the case of Vojvodina, this destination's image may be linked to the wars in the Balkans during the 1990s, and even the situation of Kosovo. Specific to Novi Sad, intensive bombings destroyed much of the bridge infrastructure over the Danube River, isolating the region's primary city. As Vojvodina represents an autonomous region of Serbia, over half of the respondents were convinced that Vojvodina is peaceful and stable. Other

rather positive responses to corresponding survey questions showed that a significant number of survey respondents perceive the region as a safe area for foreign tourists to visit, and also reported that Vojvodina is an attractive destination and good value for money. An interpretation of these highly favorable results could relate to the fact that news does not last long; even bad news can be overshadowed by more recent events somewhere else. Sooner or later the 'curiosity factor' prevails. The ever increasing and insatiable desire to see the unseen, or an unknown destination, referred to as no-name destinations above, is a strong indicator that past memories of a potentially unsafe destination can change with time as places start to welcome tourists and attract visitors.

Vojvodina has all the necessary inherited and created resources, as do many successful and competitive destinations. The only limitations regarding the region's tourism potential results from Vojvodina's non-awareness, or lack of knowledge of a destination image. Survey participants were asked what activities that they might undertake while visiting Vojvodina. This question was included to get a sense of and to understand what priorities are deemed significant to tourists when selecting tourism activities. The respondents chose these activities according to their own interest and their own previous experiences of visiting other destinations. It is acknowledged that determined priorities would have likely been different if more respondents knew more about the various tourism attractions Vojvodina has to offer. Relevant to tourism destinations such as Vojvodina, where general knowledge and destination awareness is low, the role of tour operators and travel agents is essential in the promotion of the destination by creating well-informed tour packages, to guide tourists through a destination, and focus on the destination's 'must sees' and 'not to be missed' attractions.

Concluding Remarks and Positioning Further Research

As the results of the survey suggest, Vojvodina is not a well-known tourism destination among tourism experts around the world. The results of the survey are limited due to the fact that 36 percent of the respondents are from former Yugoslav republics. This is based upon the fact that the autonomous Vojvodina region of Serbia was once, until 1991, part of the country from which these respondents are reporting; therefore their knowledge of the region as a potential tourism destination is relatively high. Moreover, twenty-four percent of the respondents have already travelled to and visited Vojvodina. For those who have previously

travelled to Vojvodina, they may assume that the region has always been a tourism destination, while for the remaining respondents Vojvodina is a new name, or a potential tourism destination to be explored and developed. For them the role of local travel agents and tour operators is more important in their own destination awareness building process by promoting specific tourism products and packages than creating a positive image by promoting the destination in the mass media. We support the idea that local tourism managers should provide knowledge about the possibilities a potential tourism destination has to offer. It remains the responsibility of foreign tour operators and travel agents to include such destinations with relatively low awareness in their catalogues and brochures, as this will introduce the destination to their potential clients.

In this regard, tour operators and travel agents become the main promoters and generators of 'launching' or 're-launching' developing destinations among the already established, known and subsequently requested destinations. Tour operators and travel agents are only not the opinion makers. Journalists and the mass media also play a significant role in promoting awareness of a destination, but those in the tourism industry are the 'architects' or the designers of a destination's image and awareness, relevant to Hennessey et al. (2010) case. By adding an emerging destination such as Vojvodina to their catalogues, brochures, or websites, they begin to promote a destination to their clientele base.

This preliminary study was aimed at acquiring destination awareness of this autonomous region of Serbia. Future work will further explore the significance of the role of travel agents and tour operators in promoting awareness of an emerging and/or developing destination. The building process of a 'new name destination' is dependent upon those skilled in the travel industry promoting a destination's image to promote awareness to encourage potential tourists to visit the intended destination to sustain its emerging service sector. Future work seeks to determine if being an unknown or 'no name' tourism destination is better than having a negative image. Well travelled tourists are always seeking for new destinations, and tour operators are eager to find or (re)invent the emerging destinations to promote place awareness.

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