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DEMOGRAPHIC ANALYSIS OF FOREIGN VISITORS TO THE EXIT FESTIVAL, NOVI SAD

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Abstract: In this paper we studied the habits and behaviour of visitors of EXIT tourist event in Novi Sad. The research was conducted on a sample of 189 randomly selected respondents from abroad. The aim was to determine whether there is a difference in the motives of foreign tourists coming to EXIT, a selection of vehicles, as well as the use of various means of tourist propaganda and the structure of expenditure of funds at foreign visitors. EXIT festival, Novi Sad has been selected for the survey because of growing brand of the festival in the total tourist offer of Serbia, specific groups of visitors, the number of foreign tourists, the links with the locality of maintaining.

Key words: EXIT, socio-demographic researches, survey, music festival, promotion

Introduction

Numerous studies of the tourist market in the world indicate the great importance of socio-demographic factors in the segment of tourist market research. Under this type of study, a significant number of studies have been carried out founding that the age structure of visitors affects the experienced notion of the visited tourist location (Ćurčić & Bjeljac, 2007).

Tourism marketing is one of the basic segments which are divided into the existing and potential tourist market, but very little or no attention has been paid in the analysis of changes of taste, needs, desires, and thoughts of consumers when choosing particular destinations. Jefferson and Lickorish (1988) suggest the following most important elements that are used for tourism marketing research:

- Socio-demographic characteristics such as: sex, age, marital status, family size, nationality and social status;

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- Socio-economic variables that indicate competence (educational structure) and incomes;
- The travel motives and
- Pattern of travel or behaviour (social and psychological) of certain group of tourists.

“In the first half of the 19th century (1831), by the decision of Prince Miloš Obrenović, the first Serbian folk orchestra was established, “knjazevsko serbska banda” led by Joseph Schlesinger” (Tadić, Slavković, Stojić, & Marinković, 2010). It was modified and modernized through various influences, but it retained its basic values that it had for centuries. From the moment when the music events began to be followed by many observers, fans of a certain musical direction and by getting the tradition of maintaining, the music was starting to be interesting for tourism (Bjeljac, 2006; Bjeljic, 2010; Bjeljic & Ćurčić, 2010). “The vast expansion of music festivals, their mass production and consumption, goes beyond the mission of art and culture and becomes a significant factor and reflects the changing of global and local social trends. Music festivals show a high degree of public performance, complex of communication networks, the scene of high-tech field, politics, bureaucracy and market”. (Lukić-Krstanović, 2008).

Pop music festivals, as a form of music in Serbia, began to develop in the mid-sixties of the 20th century and throughout decades many directions were identified presented within the festivals of rock music, pop music, jazz and blues. During the seventies and eighties of the 20th century, rock music festivals were held in Novi Sad and Belgrade- BOOM festivals, music festival „Belgrade Spring“, and during the nineties the International Fair of Music - MESAM, Belgrade. In Subotica, the youth music festival YU was being held up to the nineties. In Serbia, 49 traditional pop music festivals are held annually (31.01% of the total number of musical events) (Bjeljac, 2010). Pop music festivals are held in 32 settlements. Their average duration is three days. Pop and rock² festivals, jazz and blues music³ festivals stand out.

Organised by EXIT Non Governmental Organisation, EXIT has been held at Petrovaradin since 2000. “More than 34 large concerts were held there, where

² eg. EXIT, Novi Sad, “Gitarijada”, Zajecar, “Trenchtown” and “Summer 3P” festivals on Palić, the Acoustic Music Festival at Sivac, “Rock Village” festival at Banatski Sokolac, “Peace Fest” at Dimitrovgrad, “Nisomnia” festival in Niš, etc.

³ There are 14 jazz and blues festivals that are held in Serbia-Belgrade, Novi Sad, Niš, Kragujevac, Kanjiža, Valjevo, Kosovska Mitrovica, Užice, Pančevo, Kikinda, Indija, Sremska Mitrovica, Bačka Palanka and Šabac.

almost all famous bands of the country played, 12 shows, over 120 film screenings (some of them were premiered in Novi Sad), 20 panels, 40 large parties, 11 performances” (www. exitfest.org). Since 2001 the festival has been held in July and lasted for nine days. Since 2002 the festival has lasted four days. The number of visitors is 30 000 to 40 000 (daily), and they come from Serbia and abroad (Great Britain, Ireland, Netherlands, Australia, Japan, Jamaica, Germany, Finland, Hungary, Croatia, Bosnia and Herzegovina, Slovenia and others). The festival was attended by local and international artists (from the U.S.A., Great Britain, Denmark, Germany, Ireland, Croatia and other countries) of modern musical genres. It is held in the first half of July. EXIT represents a musical event that achieves most obviously the effects that influence the creation of positive attitudes of visitors and participants from abroad to Serbia (Bjeljac, 2010; Bjeljac & Ćurčić, 2010). Educational programs and forums are organised for young people, aimed at further integration of Serbia in the European Union. One such project is the “State of EXIT”, as well as the presentation of the non-governmental organizations from Southeastern Europe at the fair “Place to move”. According to the categorization of events in Serbia, EXIT is in the first category of tourist events (Bjeljac, 2010) with 114 points; out of 2426 studied events in Serbia, it is the second place. “The fact that the EXIT music festival has become known as a popular festival among youth all over the world contributes to creating a positive image of Serbia and attracting more and more visitors each year, providing opportunities for new, inter-cultural connections” (Zakić, Ivkov-Džigurski, & Ćurčić, 2009). Also, “transitional movements after 2000 have enabled many virtual images to become reality: the guest foreign bands, music stars have put Belgrade and Novi Sad on the booking lists, which is the first step in the strategic positioning of the country on the music market. For three years EXIT Noise Summer Fest wrote a galloping history of rebellion and fun” (Lukić-Krstanović, 2002).

Subject, Aim and the Research Methods

Subject of research. The members of younger generation were the starting idea for a sample to be included by a survey research, because of the kind of music that is listened at the festival, in order to confirm the assumption that the members of the younger generation, students and college educated ones listen rock and other contemporary music styles (15 to 40 years of age).

Aim of research. Analysis of the questionnaires was processed with the aim of determining whether there is a difference in motives of travel, the choice of means of transport, as well as the use of various means of tourist propaganda and the amount of money (how much money is spent and for what). To understand

how the festival can shape and be shaped by the place and space, the research and study were carried out on the local musical practices and cultural behaviour. Music plays an important role in facilitating the definition of concepts of community and collective identity based on physical demarcation of urban and rural places. These findings could help the creators of tourist propaganda to focus their actions in the right way and by the best means to the needs of young population as the market segment that plays a crucial role in the selection of tourist destination. Also, they may provide the insight into the impact of the EXIT festival on tourist agencies in the region.

Methods of research. The poll was used for data gathering. The survey was conducted in July 2009. It lasted four days, at three sites (Petrovaradin fortress during the festival, camping area near the Novi Sad University and the center of Novi Sad), on a sample of 189 respondents. Results were obtained on the basis of randomly selected sample by the written survey questionnaire completed by interviewers after the given verbal responses from the respondents. In this paper we made a comparison with similar studies at EXIT festival (Zakić et al, 2009) and other music festivals in the world ("V" festival, Chelmsford, Great Britain and Wangaratta Jazz Festival, Australia), (East England Tourism 2006;⁴ Curtis, 2010)

Structure of Visitors of EXIT

For the lower age limit of respondents, we took the age group from 15 to 18 years. There is no upper age limit (age group over 50 years). Analysing age structure of visitors, there has been a conclusion that most of the respondents were in the age group of 20 to 30 years, 158, that is, 83.07% (Figure 1), 11 visitors (5.82%) belonged to the age group of 15 to 19 years, 16 visitors (8.46%) were aged 31 to 40 years, and there were 2 visitors respectively in the age group of 41-50 and over 50 years (1.06%). "At "V" festival in Great Britain, 70% of respondents belonged to age group of 19 to 34 years, and gender ratio was almost equal" (EET, 2006).

Analysis of the age structure of visitors shows that these are the members of the younger age groups, mostly students and high school students (in the survey, 156 respondents said they had a university degree or they studied (82.54%)), and 29 or 15.34% were high school students or high school graduates. Four

⁴ On demand of Chelmsford Borough Council, East England Tourist Organisation (EET) carried out a research on the estimation of profiles and values of visitors, as well as the economic impact of the festival on the municipal budget.

respondents (2.12%) declared to have primary school. According to the sex structure of the surveyed visitors of EXIT festival, 116 (61.38%) were men and 73 women (38.62%).

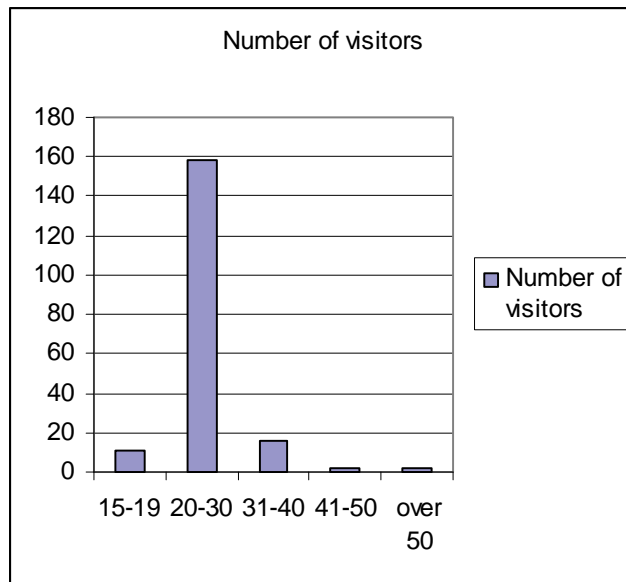


Figure 1. Age structure of visitors of EXIT

Motives and Organization of the Arrival of Visitors to EXIT and Accommodation Facilities

In the study of motives and ways for the visitors to get to EXIT, the answers to several questions were analysed. As an immediate introduction, the question for foreign tourists was: *Whether they have ever been to Serbia before?* Slightly more than two-thirds of respondents (130 or 68, 78%) said they came for the first time in Serbia, and 59 (33.22%) that were formerly in Serbia. In this regard, there was the question: *How many times have you been to Serbia?* (Table 1).

The questions associated with the previous ones were: *Have you been to EXIT before?* and *How many times have you been at the festival?* (Table 2). There were 153 respondents (80.95%) who had not been at the festival before (2009), while 36 visitors (19.05%) answered that they had come previously.

Table 1. Number of stays of EXIT visitors in Serbia

Age and sex	Number of respondents	First time	1-2 times	3-5 times	>6 times
15-19 yrs.	11	9	2	0	0
m	7	6	1	0	0
f	4	3	1	0	0
20-30	159	112	31	15	0
m	98	71	15	11	0
f	61	41	16	4	0
31-40	16	9	4	3	0
m	10	6	2	2	0
f	6	3	2	1	0
41-50	2	0	0	0	2
m	1	0	0	0	1
f	1	0	0	0	1
Over 50 yrs.	2	0	0	0	2
m	1	0	0	0	1
f	1	0	0	0	1
Total	189	130	37	18	4

Source of data: results of the questionnaire

Analyzing the Table 2, we can conclude that the motive of surveyed visitors of EXIT festival to come to Serbia was the EXIT music festival itself, (61.02% of the visitors who have already been in Serbia). Visitors who were at the EXIT for the first time in 2009 make the largest number, 153, or 80.95%. To determine the means of transport by which they came, we set up the question: *How did you organize your visit?* Most visitors (135, or 71.42%) responded: independently, by direct booking of transport and accommodation. In this group, the largest number of visitors is from the age group of 20 to 30 years, and apart from them, the visitors of the age group of 31 to 40 years made a reservation directly over the internet (this refers to the direct booking of accommodation over the website EXIT (www.exitfest.org/tourist info). There were 27 surveyed visitors who came to the EXIT music festival without reservation (14.28%). There were 16 visitors (8.46%) who came to the EXIT festival by using their own transport and reserving accommodation at travel agencies.⁵ There were six respondents (3.17%) who came to the EXIT by providing accommodation independently and transportation through travel agencies, while five respondents (2.67%) booked a complete package of services over travel agencies. Such a small percentage of

⁵ it is meant on travel agencies wherefrom a visitor comes from

organized visits is an indicator of poor cooperation between the organizers of the festival and travel agencies in Novi Sad.

Table 2. Number of stays of EXIT visitors

Age and sex	Number of respondents	First time	1-2 times	3-5 times	>6 times
15-19	11	10	1	0	0
m	7	6	1	0	0
f	4	4	0	0	0
20-30	159	133	18	7	0
m	98	82	11	5	0
f	61	51	7	2	0
31-40	16	10	1	4	1
m	10	6	1	2	1
f	6	4	0	2	0
41-50	2	0	2	0	0
m	1	0	1	0	0
f	1	0	1	0	0
>50	2	0	2	0	0
m	1	0	1	0	0
f	1	0	1	0	0
Total	189	153	24	11	1

Source of data: results of the questionnaire

Analysis of the question: *Which means of transport did you use?* indicates that the largest number of foreign visitors arrived by air (116 or 61.37%), train (32 or 16.93%), bus (25 or 13.22%) and car (16 or 8.46%). The largest number of visitors from the age group of 20 to 30 years used plane as means of transportation, and older age categories used car. When it comes to length of stay of visitors to the EXIT festival, foreign visitors who participated in the survey spent an average of six days. The largest number of respondents stayed for five days (67 or 35.45%), that is, four days (36 or 19.05%). Viewed by age structure, the age group of 20 to 30 years dominated at visitors who stayed for five days. One part of the surveyed visitors planned to stay longer than eight days and apart from Novi Sad they planned to visit Fruska Gora, Belgrade, while one part would go on to Montenegro for summer vacation (41, ie. 21.69%). Viewed by age structure, the age group of 20 to 30 years is also predominant here, but there are also all other older age groups (from 31 to 40 years, from 41 to 50 years and 50 years and over)⁶.

⁶ married couple with two children

Analysis of accommodation facilities used by the surveyed visitors from abroad, shows that the largest number of visitors accommodated in the camp (97 or 51.32%), hostels (58 visitors, ie. 30.69%), private accommodation (rented apartments and rooms), (17 or 8.99%), hotels in Novi Sad (8 or 4.23%) and other types of accommodation (5.07%) which coincides with how they organized their arrival, that is, younger categories (from 20 to 30 years) organised accommodation in the EXIT camp and the Novi Sad hostels, while older age groups and the youngest ones in hotels and private accommodation.

Table 3. Structure of visitors according to accommodation

Age group	15-19	20-30	31-40	41-50	>50	Total
<i>Kind of accommodation</i>						
Camp	0	97	0	0	0	97
Male	0	62	0	0	0	62
Female	0	35	0	0	0	35
Hostel	0	49	9	0	0	58
Male	0	28	5	0	0	33
Female	0	21	4	0	0	25
Private accommodation	6	3	7	0	0	16
Male	5	2	5	0	0	12
Female	1	1	2	0	0	4
Hotels	4	0	0	2	2	8
Male	2	0	0	1	1	4
Female	2	0	0	1	1	4
Other kinds of accommodation	1	7	0	0	0	8
Male	0	5	0	0	0	5
Female	1	2	0	0	0	3

Source of data: questionnaire

Consumption, Information and Impressions

Visitors of the EXIT festival that we surveyed were asked the following: *How much money have you planned to spend during your stay?* (Table 4) and *What have you planned to spend money on during your stay?* Most of the respondents planned to spend their money on food and drink, 85 respondents or 44.97%. That they will spend the money only on accommodation 37 (19.57%) interviewed visitors answered. There were 23 (12.17%) respondents who declared that they would spend most money on buying souvenirs and other items that will remind them of stay in Novi Sad. There were 44 respondents (23.28%) who will spend their money on food, beverages, accommodation, souvenirs, etc. (clothing, jewelry, cosmetics, etc.). The average consumption of money is (with

the costs of transport) about 400 euros. Three respondents said they planned to spend over 1 000 euros.

Table 4. How much money are you going to spend during the EXIT (in euros)?

Age group	Up to 100	101-300	301-500	>500
15-19	1	6	2	2
Male	0	5	1	1
Female	1	1	1	1
20-30	39	81	20	18
Male	31	47	9	11
Female	8	34	11	7
31-40	0	9	7	0
Male	0	5	5	0
Female	0	4	2	0
41-50	0	0	0	2
Male	0	0	0	1
Female	0	0	0	1
Over 50 years	0	0	2	0
Male	0	0	1	0
Female	0	0	1	0
Total	40	96	31	22
	21,17%	50,79%	16,40%	11,64%

Source of data: questionnaire

Comparing to similar festivals, such as Wangaratta jazz festival in Australia (where the festival has a significant impact on the local economy of Wangaratta), in 2006, 50% of the visitors of festival spent more than 500 dollars (excluding money spent for tickets) on accommodation, food, fuel, shopping, souvenirs and local products, so this festival has a significant impact on the local economy. “A sum of 100 dollars was spent by 10% of visitors, 21% of visitors spent from 101 to 300 dollars, from 301 to 500 dollars - 19% of visitors, and only 1% of visitors spent a sum of more than 1 500 dollars” (Curtis, 2010). At the “V” music festival (Chelmsford, UK) “daily expenses, excluding the cost of tickets, range from 26.26 dollars per day for visitors who reside in the camp, 37.52 dollars for visitors who are retained for only one day to 60.86 dollars for those who stay at a distance from the Festival” (Chelmsford Borough Council, 2006).⁷ While in Australia, at the Jazz Festival and Festival EXIT, an average consumption is about 400 euros, at “V” festival in the UK visitors spend an

⁷ In 2006, the ratio between the US dollar and euro was 1 dollar=0.79 uros, while in 2009, 1 dollar=0.78 euros.

average of about 300 euros. Food, drinks and souvenirs are the most represented as products that are purchased during stay at all three festivals.

One of the questions from the questionnaire was: *How were you informed about the EXIT?*⁸ The aim of this question was to examine which form of promotional activity of the organizers has influenced most on potential visitors to decide to come to the EXIT festival. The largest number of respondents, 117 (61.90%) answered that they had been informed about the event by the previous visitors (participants, relatives, friends, etc.) and by direct contact with the organizers, over the internet (110 or 58.20%). Through reports in the mass media (newspapers, television) 10 visitors (5.29%) were informed, and 4.23% of visitors were informed through travel agencies. Other sources were used by 2.12% of the respondents. When asked *To what extent the information about the Exit were accessible to you?* 135 respondents said „easily accessible“ (71.43%), 11 respondents said „hardly accessible“ (5.82%), while the others said „accessible“ (43 of them, or 22.75%), which indicates the internet as the place of information and insufficient impact of tourist agencies from Serbia. In the question *What are your impressions and would you come again?* all respondents said they were delighted and would probably come again.

Conclusion

The processed data based on responses of 189 respondents showed that majority of foreign visitors comes from Great Britain, Slovenia, Germany, the Netherlands, using a plane and train as a mode of transportation. The largest number of respondents is in the age group of 20 to 30 years, indicating that the tourism industry of Novi Sad during the EXIT should be more engaged in preparation of adequate programmes, the clients and not to let all to the EXIT team. Bearing in mind the interest of younger population for coming to the EXIT, the Internet as a multimedia means of tourist propaganda is the most effective tool in the animation of this age group, as a tourist clientele.

Research has shown that visitors organised coming independently, reserving accommodation through the website of EXIT, while a small number of tourists organised their stay through a travel agency. Such a small percentage of organized visits from abroad points to insufficient cooperation between the organizers of the event and travel agencies in the region, due to aspiration of the EXIT team to hold the tourist activities under its control, which is inconsistent with the regulation of Serbia in the tourist hotel services. Given that the largest

⁸ Several answers could be given to this question

number of visitors during the festival stay in the camp, hostels and private accommodation, except the EXIT team, greater control of accommodation facilities and other conditions of accommodation of visitors should be left to the Tourist Organization of Novi Sad, particularly due to the charging tax control. Example of the “V” festival in the UK, for which a special business study was created, shows that such study should be done not only for the EXIT festival, but for other tourist events in Serbia which attract many visitors from abroad.

The survey results that show the length of stay indicate that there are foreign visitors who stay longer than the duration of the festival (one fifth of respondents stays longer than seven days), which indicates the interest of foreign visitors of young age group to stay in Novi Sad and Serbia even past the festival. This interest should be used by appropriate programmes in order that their stay would not be the elemental one.

The analysis has shown that foreign visitors at the EXIT spend around 400 euros on average, but the consumption beyond basic needs is relatively small because it is a younger population about, mainly unemployed one (students). “Unpredictable” tourist expenditure largely depends on the quality of supply. If we take into account the fact that during the festival prices of taxi services, food, beverages and other goods become unjustifiably more expensive for 50% in the shops and restaurants located near the camp and at the foot of the fortress even beyond the market and municipal inspection, the increase in the financial consumption of foreign visitors can hardly be expected in Novi Sad.

The motives of the respondents’ visit are initiated by tourist reasons, and fun and companionship are defined within tourist motivated visits, and besides music, young visitors from abroad need to be offered programmes that are adequate to age and cultural heritage of Novi Sad and its surroundings.

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