

EXECUTIVE SUMMARY

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| TOMAS-SUMMER 2004 SURVEY | <ul style="list-style-type: none"> • Survey on attitudes and expenditures of tourists in Croatia in summer 2004. • The only longitudinal research on various characteristics of tourists in Croatia, conducted for the sixth time by the Institute for Tourism since 1987. |
| TOMAS-SUMMER 2004 - SURVEY METHODOLOGY | |
| Research goals: | <ul style="list-style-type: none"> • Basis for segmenting the tourist market • Identification of the main advantages and disadvantages of the Croatian tourism product • Data on tourist expenditures • Continuous tracking of the tourism demand trends |
| Area frame: | <ul style="list-style-type: none"> • Seven coastal counties (County of Istria, Primorje-Gorski Kotar, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia and Dubrovnik-Neretva) |
| Time frame: | <ul style="list-style-type: none"> • June to September 2004 |
| Survey instrument: | <ul style="list-style-type: none"> • Questionnaire |
| Method: | <ul style="list-style-type: none"> • Personal interviews and self-completion |
| Sample size: | <ul style="list-style-type: none"> • 4476 respondents interviewed in 88 destinations |
| Population: | <ul style="list-style-type: none"> • 4 types of accommodation facilities: hotels, holiday dwellings, campsites, private accommodation facilities • 13 countries of origin: Croatia, Germany, Italy, Slovenia, Czech Republic, Austria, Hungary, Netherlands, Poland, France, Slovakia, Great Britain and Bosnia and Herzegovina |
| Sample design: | <ul style="list-style-type: none"> • Stratified random sampling • Strata: <ul style="list-style-type: none"> • County • Type of accommodation facility • Country of origin • Sample frame – tourist overnights in 2003 • Representative sample on a county level, type of accommodation facility and country of origin |
| Sample - weighting: | <ul style="list-style-type: none"> • All survey results were corrected by 2004 data on tourist overnights by the county, type of accommodation facility and country of origin |

**MAIN RESEARCH RESULTS AND
OBSERVED CHANGES IN COMPARISON TO 2001 SURVEY RESULTS**

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| <p>Socio-demographic profile:</p> | <ul style="list-style-type: none"> • Dominant share of tourists between 30-49 years of age (52%), tourists, on average 40 years old (median 38). • About 60% have two-year college or university degree. • Travel party – families (43%), followed by the tourists coming with a partner only (38%). ✓ <i>Tourists are on average more educated.</i> ✓ <i>Slight decrease of family arrivals and the increase of the arrivals with a partner.</i> |
| <p>Motivation:</p> | <ul style="list-style-type: none"> • Primary motive for coming to Croatia is rest and relaxation at the seaside followed by pleasure and fun, new experiences and visiting natural attractions. • Tourists' previous visits are the most important source of information followed by the recommendations of friends and relatives; various media rank third in importance and Internet fourth (23%). • Croatia has the greatest share of loyal tourists – those that visited Croatia three or more times (69%); 40% visited Croatia six and more times. ✓ <i>Rest and relaxation at the seaside are remaining the main motive for coming, but pleasure and fun and new experiences are gaining in importance, while visiting natural attractions is slightly decreasing.</i> ✓ <i>Besides previous visits and recommendations by friends and relatives, the share of those who used media and Internet as source of information is increasing; simultaneous use of different sources of information is noticeable.</i> ✓ <i>Slight growth of the guests who visited Croatia three or more times is noticeable; tourists' loyalty to destination and accommodation facility is increasing.</i> |
| <p>Travel characteristics:</p> | <ul style="list-style-type: none"> • Tourists are mostly coming by car (82%). • Tourists are primarily coming to spend their main annual holiday (76%); majority (64%) organized holiday by themselves. ✓ <i>Slightly less tourists are coming by bus.</i> ✓ <i>Slight growth of tourists on their second or third vacation during the year and those on short breaks.</i> |
| <p>Stay in a destination:</p> | <ul style="list-style-type: none"> • About 61% of guests are organizing their meals outside the accommodation facility; among them the majority use the combination of restaurants and self-prepared meals; one fourth are using half-board option. • Dominant summer activity is swimming/bathing (98%) followed by visits to café-bars, cake shops and restaurants, shopping, as well as enjoying nature walks and self-organized excursions (more than 70%). ✓ <i>Growing share of tourists who organize their meals outside the accommodation facility.</i> ✓ <i>Range and the intensity of activities of tourists in Croatia is increasing compared to the 2001 survey.</i> |

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| Attitudes: | <ul style="list-style-type: none"> • Guests are mostly satisfied with the beauty of the nature and scenery, with the suitability for a family holiday, personal safety, as well as with friendliness of staff in the accommodation establishment. • Guests are not satisfied with a number of tourism supply elements – 11 out of 26 did not satisfy guests at all. • Elements concerning availability and the quality of destination tourism product (culture, fun, sport and shopping, local transport, information and signage as well as destination accessibility) and value for money are evaluated low. ✓ <i>On average, guests' satisfaction with tourism product is on increase compared to 2001 survey.</i> ✓ <i>For the first time, number of elements that guests are satisfied with outstrip the number of elements that are not to their satisfaction, although the elements of destination tourism product leading to dissatisfaction remain the same as in the 2001 survey.</i> |
| Competitiveness of Croatian tourism 'product' - general: In comparison to: Spain, France and Italy: | <ul style="list-style-type: none"> • Advantages - climate, natural beauty, picturesqueness and tidiness of town/resort, personal safety, friendliness, environmental preservation, value for money. • Disadvantages - all aspects concerning destination tourism supply elements (pleasure and fun, sport and recreation, shopping possibilities), information and presentation of cultural heritage, image of Croatia. <ul style="list-style-type: none"> • Advantages - personal safety, friendliness, climate, natural beauty, environmental preservation, tidiness of town/resort, value for money. • Disadvantages - accessibility, information and presentation of cultural heritage, pleasure and fun, sport and recreation, shopping possibilities, variety of gastronomic offers. |
| Greece: | <ul style="list-style-type: none"> • Advantages - personal safety, accessibility, value for money, friendliness, climate, natural beauty, environmental preservation, tidiness of town/resort. • Disadvantages - image of Croatia, architecture and picturesqueness of town/resort, information and presentation of cultural heritage, pleasure, fun and shopping possibilities, variety of gastronomic offers. |
| Turkey: | <ul style="list-style-type: none"> • Advantages - almost all aspects of tourism supply elements. • Disadvantages - shopping possibilities. |
| Slovenia: | <ul style="list-style-type: none"> • Advantages - almost all aspects of tourism supply elements. • Disadvantages - image of Croatia, sport and recreation possibilities. |
| Expenditures: | <ul style="list-style-type: none"> • There are, on average, 11 overnights realized on holidays in Croatia; average travel party size is 3 person; average trip expenditures per person is estimated at 623 Euro. • Average daily expenditure during the summer months is estimated at 49 Euro, of which 78% is spent on basic services. ✓ <i>Average daily expenditure in summer 2004 is about 42% higher than those realized in 2001.</i> ✓ <i>The share of other services in average daily expenditure increased from 13% in 2001 to 22% in 2004.</i> |

OBSERVED TRENDS IN 1987 - 2004 PERIOD

- ✓ *Dominant share of middle age tourists continues.*
- ✓ *Slightly more educated tourist population.*
- ✓ *Tourists are predominately coming accompanied by their families but their share is slightly decreasing.*
- ✓ *Share of tourists motivated by pleasure and fun and new experiences is increasing.*
- ✓ *Guests are using more and wider range of information sources.*
- ✓ *Continuous growth of loyal tourists.*
- ✓ *Share of tourists coming to Croatia by car remains dominant.*
- ✓ *Decrease of tourists spending their main annual vacation; increase of those on short holiday breaks.*
- ✓ *Duration of summer holiday is decreasing.*
- ✓ *Stable predominant share of individually organized holidays.*
- ✓ *Increasing trends of guests combining restaurant dining and self-preparation of meals.*
- ✓ *Guests are increasingly active while spending their summer holidays in Croatia.*
- ✓ *Guests report higher satisfaction with the majority of tourism supply elements; the elements of destination tourism product leading to guests' dissatisfaction remain the same throughout the period.*
- ✓ *Increasing tourists' expenditures with noticeable trend of higher share of non-accommodation expenses.*