

EXECUTIVE SUMMARY

TOMAS Cruising 2006	<ul style="list-style-type: none"> • Survey on attitudes and expenditures of cruise ship visitors in Croatia in 2006. • Conducted for the first time and supported by the Ministry of the Sea, Tourism, Transport and Development of the Republic of Croatia, Croatian National Tourism Board, Tourism Boards of County of Dubrovnik-Neretva, Split-Dalmatia and Zadar, Tourism Boards of Town of Dubrovnik, Korčula and Zadar and Port of Zadar.
RESEARCH METHODOLOGY	
Research goal	<ul style="list-style-type: none"> • To define characteristics of demand and expenditures of cruise ship visitors in Croatia. • To establish and test the research methodology.
Time and area frame	<ul style="list-style-type: none"> • Town of Dubrovnik, Korčula, Split and Zadar. • June to September 2006.
Methods of data collection and survey instrument	<ul style="list-style-type: none"> • Personal interviews with cruise ship visitors before their departure. • Questionnaire in five languages (English, German, Italian, French and Spanish).
Scope of research	<ul style="list-style-type: none"> • Based on the literature review of foreign research/experiences and standard TOMAS methodology. • Socio-demographic profile of cruise ship visitors, their activities in destinations, satisfaction with elements of tourism supply and expenditures in destinations.
Population	<ul style="list-style-type: none"> • Cruise ship visitors (passengers and crew members) on international cruise ships visiting Dubrovnik, Korčula, Split and Zadar from June to September 2006.
Sample	<ul style="list-style-type: none"> • 1340 cruise ship passengers and 319 crew members. • Stratified random sample; strata defined by town, cruise ship size in number of passengers and cruise ship visitor (passenger/crew member). • Sample frame – cruise ship visiting plans for four towns.
Post stratification	<ul style="list-style-type: none"> • All survey results were corrected by 2006 data on number of passengers in period June - September 2006, by town and cruise ship size. • Representativeness of the sample on a town level, type of visitor (passenger/crew member) and ship size.
Presentation of results	<ul style="list-style-type: none"> • The survey results are presented by town, ship size, type of visitor and country of passenger's origin. • In addition, survey results for Dubrovnik are presented separately, following the same structure.

RESULTS	
Socio-demographic profile of cruise ship visitors	<ul style="list-style-type: none"> • The most represented among cruise ship visitors are Italians (27%), both among passengers and crew, followed by visitors from USA (20%), Spain (17%), Great Britain (7%), France (7%), Germany (3%) and other European and overseas countries. Crew members are more often coming from other European and other overseas countries. • The average cruise ship visitor is 42 years old, passenger is 44, and crew member 31 years old, on average, respectively. • Among cruise ship visitors 64% are visiting Croatia for the first time (73% among passengers and 9% among crew).
Activities during the stay in destinations	<ul style="list-style-type: none"> • Cruise ship visitors stay off board in destination 5 hours, on average (passengers 5.3 and crew 4 hours on average). • Cruise ship visitors have drinks in restaurants and cafés (80%), go shopping (78%) and independent city sightseeing (72%). • From 30 do 50% of cruise ship visitors consume food in restaurants (48%), take organized excursions or organized sightseeing (39%) or visit museums or exhibitions (31%). • Every tenth cruise ship visitor is returning to the ship while in destination, because of rest, refreshment or food and drink on board.
Satisfaction with elements of tourism supply in destinations	<ul style="list-style-type: none"> • Cruise ship visitors were very satisfied with the following elements of tourism supply: overall impressions, organized tours of the surrounding area as well as city-tours, gastronomy, souvenirs, tour-guides professionalism - foreign language competency, shopping opportunities and personal safety. • They were also mostly satisfied with friendliness of locals and tourism and hospitality staff, tidiness of town and surroundings and the quality of signage. • Cruise ship visitors were not satisfied with accessibility - availability of brochures, and, especially, with traffic in the town.
Competitiveness of Croatian cruising destinations	<ul style="list-style-type: none"> • Only about 11% of cruise ship visitors pointed out that they were more satisfied in some other cruise destination. • Cruise ship visitors in Dubrovnik pointed out following competitive cruise destinations: Istanbul, Venice and several Greek destinations (Rhodes, Mykonos, Corfu, Athens as well a Greece overall).
Cruise ship visitors expenditures in destinations	<ul style="list-style-type: none"> • Cruise ship visitors expenditures in destination amounted to 39 € per person on average, passengers spent 41 €, and crew members 29 € per person, on average. • About 5% of visitors did not spend anything while visiting destination and 4% of visitors spent more than 100 € per person on average. • Among cruise ship passengers, those from Great Britain spent the most (51 € on average), followed by Americans (49 € on average) and French (46 € on average). • Cruise ship visitors spent on average 34 €, 37 €, 71 € and 82 € per person in Korčula, Dubrovnik, Split and Zadar, respectively. • The majority of cruise ship visitors bought souvenirs (62%), followed by those who bought postcards (33%), clothing (20%), original Croatian drinks (16%), arts (16%) and original Croatian food (12%).