

EXECUTIVE SUMMARY

TOMAS-SUMMER 2007 SURVEY

- Survey on attitudes and expenditures of tourists in Croatia in summer 2007
- The only longitudinal research on various characteristics of tourists in Croatia, conducted for the seventh time by the Institute for Tourism since 1987

METHODOLOGY

Research goals

- 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

- Seven coastal counties (County of Istria, Primorje-Gorje, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia and Dubrovnik-Neretva)

Time frame

- June to September 2007

Survey instrument

- Questionnaire available in eleven languages

Method

- Personal interview

Sample size

- 4915 respondents interviewed in 86 destinations

Population

- 4 types of accommodation facilities: hotels, holiday dwellings, campsites, private accommodation facilities
- 14 countries of origin: Croatia, Germany, Italy, Slovenia, Czech Republic, Austria, Hungary, Netherlands, Poland, Slovakia, France, Great Britain, Russia, Bosnia and Herzegovina and a group of other countries (Sweden, Denmark, Switzerland, Belgium and Norway)

Sample design

- Stratified random sampling, strata:
 - County
 - Type of accommodation facilities
 - Country of origin
- Sample frame – tourist overnights in 2006
- Representative sample on a county level, type of accommodation facility and country of origin

Sample weighting

- All survey results were corrected by 2007 data on tourist overnights by the county, type of accommodation facility and country of origin

Presentation of results

- All survey results are presented by the county, type of accommodation facility and country of origin

MAIN RESEARCH RESULTS AND OBSERVED CHANGES COMPARED TO 2004 SURVEY RESULTS

Socio-demographic profile

- Tourists between 30-49 years of age dominate (56%); the average age of tourists is 41 years (median 39)
- About 60% have two-year college or university degree
- Almost half of tourists have monthly household income of 2000 Euros or less
- ✓ *In the summer 2007 tourists are on average one year older than in summer 2004*
- ✓ *Tourists are slightly more educated than in 2004 (27% of tourists with university degree in 2004 as opposed to 29% in 2007)*

Motivation

- Travel party – families (47%), followed by the tourists coming with partner only (38%) and friends or acquaintances (16%)
- Primary motive for coming to Croatia is rest and relaxation at the seaside followed by pleasure and fun; three motives - visiting natural attractions, new experiences and gastronomy - attract from one fifth to one fourth of tourists
- The most important sources of information are media (34%), the recommendations of friends and relatives (31%), Internet (30%) and tourists' previous visits (27%)
- Croatian tourists are loyal - 60% visited Croatia three or more times; 27% visited Croatia six and more times; for 19% summer vacation in 2007 has been first visit to Croatia
- ✓ *Slight increase of family arrivals and the decrease of the arrivals with a partner*
- ✓ *Rest and relaxation at the seaside are remaining the main motive for visiting Croatian seaside destinations, although with a slight decrease; the biggest increase, from tenth place in 2004 (6%) to eight place in 2007 (10%), is noted in arrivals motivated by visiting cultural attractions and manifestations*
- ✓ *The share of those who used media and Internet as source of information is increasing while information based on previous visits are becoming less important*
- ✓ *The share of 'new' foreign tourists, those who visited Croatia for the first time, is increasing (from 14% in 2004 to 19% in 2007)*

Travel characteristics

- Tourists are mostly coming by car (81%) followed by airplane (9%) and bus (8%)
- Travel agent services are used by 34% of tourists, mainly for accommodation booking; 10% of tourists have full package holiday
- ✓ *Increase of air transport in tourist arrivals (from 6% in 2004 to 9% in 2007)*
- ✓ *The use of travel agent services increased from 30% in 2004 to 34% in 2007*

Stay in a destination

- Tourists stay, on average, 10 nights in destination (mean 9.8, median 8); the most frequent stays are those from 4 to 7 overnights (43%)
- About 59% of guests are organizing their meals outside the accommodation facility; one fifth (19%) are using half-board option and 14% are having breakfast within accommodation facility
- Dominant summer activity is swimming/bathing (98%) followed by visits to café-bars, cake shops and restaurants, shopping, as well as going on self-organized excursions (more than 70%)
- ✓ *The average duration of stay in destination is decreasing, from 11.7 overnights in 2004 to 9.8 overnights in 2007*
- ✓ *Share of tourists who have breakfast within accommodation facility is increasing; share of those having half-board is decreasing*
- ✓ *Participation in various activities, both in terms of range and frequency, is slightly increasing compared to the 2004 survey results*

Attitudes

- Guests are very satisfied with the beauty of the nature and scenery and the suitability for a family holiday; there are 16 more elements the guests are satisfied with, among which are personal safety, friendliness of staff and the quality of services in the accommodation establishment, value for money of the entire stay as well as the entire stay by itself
- On seven elements, mostly pertaining to destination attractiveness, tourists expressed medium level of satisfaction
- Elements concerning availability and the quality of destination tourism product (culture, fun, and shopping, local transport, information and signage) are evaluated low
- ✓ *On average, guests' satisfaction with tourism product increased significantly in comparison to 2004 survey*

Competitiveness of Croatian tourism 'product'

- Advantages - climate, natural beauty, picturesqueness and tidiness of town/resort, personal safety, friendliness, environmental preservation, value for money, gastronomic offer
- 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

Expenditures

- The average trip expenditures per person is estimated at 651 Euro; out of that 102 Euro are travel expenditures, 28 Euro are paid for travel agent services and 521 Euro are expenditures during the stay in destination
- Average daily expenditure during the summer months is estimated at 55 Euro, of which 38 Euro (68%) is spent on hospitality services while 17 Euro (32%) is spent for shopping, sport, recreation and entertainment, culture, excursions and other services
- ✓ *Average daily expenditure in summer 2007 is about 13% higher than in 2004*
- ✓ *The share of expenditures for hospitality services increased 21%, expenditures for shopping decreased 6%, while expenditures for other services increased, on average, 8% in 2007*