

EXECUTIVE SUMMARY

TOMAS TRANZIT 2005	<ul style="list-style-type: none"> Survey on attitudes and expenditures of tourists in motor road vehicles on their journey to coastal destinations in Croatia in 2005. Conducted for the first time. Ordered by the Ministry of the Sea, Tourism, Transport and Development of the Republic of Croatia.
Transit tourism	<ul style="list-style-type: none"> The set of phenomena and relations that arises from the passenger's needs while travelling across the area that is neither an origin nor a destination of a journey.
SURVEY METHODOLOGY	
Research goal	<ul style="list-style-type: none"> To define characteristics of demand and expenditures of tourists using Croatian road network while travelling in motor road vehicles to the coastal destinations.
Time and area frame	<ul style="list-style-type: none"> Seven coastal counties (County of Istria, Primorje-Gorje, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia and Dubrovnik-Neretva). July to September 2005.
Methods of data collection	<ul style="list-style-type: none"> Mostly personal interviews with tourists upon their arrival by motor road vehicles to the Croatian coastal destinations; partly self-completion. Telephone interview with bus transport suppliers (coach companies and travel agencies).
Scope of research	<ul style="list-style-type: none"> Based on the relevant literature review, primary research conducted in Croatia in 1989 and standard TOMAS methodology.
Survey instrument	<ul style="list-style-type: none"> Questionnaire, in Croatian and nine foreign languages. Map of Croatia where all motorways and the selection of the most important state, county and local roads were marked, as well as the most frequent border crossings and car-ferry lines. The respondents were marking the roads they used while travelling to their coastal destination in Croatia.
Population	<ul style="list-style-type: none"> Tourists with at least one overnight in commercial accommodation facilities in one of the seven Croatian coastal counties in July, August and September 2005 who arrived by personal road motor vehicle (car, caravan, motor home or motorcycle) or by bus.
Sample size	<ul style="list-style-type: none"> 2987 interviews in 61 destinations. 15 firms in Croatia and abroad who provide service of bus transport, out of which two travel agencies and thirteen coach companies.
Sample design	<ul style="list-style-type: none"> Stratified random sampling. Strata: county, type of accommodation facilities and country of origin. Sample frame – tourist arrivals in 2004. Representative sample on a county level, type of accommodation facility and country of origin.
Post stratification	<ul style="list-style-type: none"> All survey results for the respondents in personal motor road vehicles were corrected by 2005 data on registered tourists' arrivals in seven coastal counties in period July - September 2005, corrected for the proportion of arrivals by motor road vehicles (by the county, type of accommodation facility and country of origin).
Presentation of results	<ul style="list-style-type: none"> Survey results are presented separately for tourists who arrived by personal motor road vehicles (based on 2757 respondents) and those that arrived by bus (based on 230 respondents). Survey results for tourists who arrived by personal motor road vehicles are analysed by county and by the country of tourist's origin.

RESULTS	
TOURISTS IN PERSONAL MOTOR ROAD VEHICLES (CAR, CARAVAN, MOTOR HOME, MOTORCYCLE)	
Type of motor road vehicle, length and duration of trip to Croatian coastal destinations	<ul style="list-style-type: none"> • The majority of tourists arrived by car (91%), followed by motor home (5%) and motorcycle (4%). • The average length of journey towards coastal destinations in Croatia was about 237 km; domestic and foreign tourists travelled 301 and 231 km on average, respectively. • The average journey in Croatia, including all stops, waiting time at border-crossings, ferry and pay toll, as well as time spent on ferry was 4.5 hours; 5.1 hours for domestic and 4.5 hours for foreign tourists on average. • Journey in Croatia was about 31% of total number of kilometers and about 33% of total travel time for foreign tourists.
Selection of road in Croatia	<ul style="list-style-type: none"> • Croatian motorways were used by 83% of tourists travelling to the coastal destinations. Tourists travelled on average 155 km on motorways and 82 km on state, county and local roads.
Stops along the roads in Croatia while travelling to the coastal destinations	<ul style="list-style-type: none"> • Approximately two-thirds of tourists (69%) stopped in Croatia at least once on their journey to the coastal destinations. • The average number of stops was 1.3 (0.7 stops on motorways and 0.6 stops along other roads). Those who stopped at least once, stopped 1.9 times on average. • Those who did not stop in Croatia on their trip to coastal destinations (31%) realised, on average, 105.5 kilometers on Croatian road network. The primary reason for not stopping was the lack of need. The secondary reason was the lack of the interesting attractions that would motivate passengers to stop. • Out of all stops along the roads in Croatia, 54% were along motorways and 46% along other roads. • The primary reason for stopping was toilet (30%) and fuel (27%) following by the "rest from driving" (15%). Visiting tourism attractions along the roads was main reason for less than 5% of total number of stops. • Total duration of all stops in Croatia for tourists travelling to the coastal destinations was 67 minutes on average. The average time per stop was 35 minutes. Stops on state, county and local roads were on average longer than those on Croatian motorways (41 and 31 minutes, respectively). • The main reasons tourists were not planning to visit any tourism attraction in Croatia en route to their coastal destination was desire to arrive at destination as soon as possible (70%) and the fact that everything of interest had already been seen (19%), (as the consequence of high proportion of those (72%) who already visited Croatia for three or more times). • Recommendations by friends and relatives, Internet, brochures and personal experience were sources of information about en route tourism attractions in Croatia used by tourists while still at home. The main sources of information about en route tourism attractions while travelling in Croatia were local residents, billboards and other posters along the roads, while less used were brown tourism signage, brochures obtained at border-crossings, roadside facilities or tourism information centers.

Waiting time on Croatian border-crossings, pay toll and ferry	<ul style="list-style-type: none"> Foreign tourists were waiting on Croatian border-crossings about half an hour on average. The majority of tourists (87%) evaluated that time as acceptable regarding the period of high tourism season. Those who found waiting time on border-crossings unacceptable were waiting, on average, 1.2 hours. The average waiting time for paying the road-toll on Croatian motorways, for those using them, was less than 15 minutes and 90% of tourists evaluated it as acceptable regarding the high tourism season. Those who found waiting time unacceptable were waiting about 45 minutes on average. The average time waiting for ferry was 36 minutes and 88,5% of tourists found it acceptable. Those who found it unacceptable were waiting one and half hour on average. Among tourists using ferry in Croatia to reach coastal destination, 43% considered ferry harbours not well supplied with goods and services that relieve the waiting time.
Satisfaction with offer along the roads in Croatia	<ul style="list-style-type: none"> Tourists were not very satisfied with any of fifteen elements of roadside offer along motorways in Croatia. The elements tourists were the most satisfied with were: friendliness of roadside facility service staff along motorways, sufficiency of petrol stations, quality of restaurants/cafés and quality and appearance of petrol stations. Elements of roadside offer along motorways in Croatia tourists were not satisfied with include traffic and tourism signage, possibility of obtaining information about attractions and other tourism products, sufficiency of restaurants/cafés, shops, rest area and appearance and the equipment of those facilities. The worst evaluated elements of roadside offer along motorways in Croatia include sufficiency and cleanliness of the roadside toilet facilities. Almost all of the elements of roadside offer along the state, county and local roads were evaluated as worse in comparison to those along Croatian motorways.
Competitiveness of roadside offer along Croatian motorways	<ul style="list-style-type: none"> As an advantage of Croatian roadside offer along motorways tourists recognized the friendliness of roadside facility service staff. It was evaluated as significantly better in Croatia in comparison to Greece, Hungary and Slovenia. Other elements of roadside offer along motorways in Croatia, from the sufficiency of roadside service facilities, their quality, possibility of obtaining information about attractions and other tourism products, to the traffic and tourism signage along motorways, were evaluated as worse in Croatia in comparison to France, Germany, Austria and Italy, and as better in Croatia in comparison to Spain, Greece, Hungary and Slovenia. France and Germany are pointed out as the countries with significantly better equipment and the quality of roadside facilities along their motorways as well as better traffic signs on motorways.
Attitudes towards travel	<ul style="list-style-type: none"> Improved transport accessibility of a destination, as a result of the construction of new motorways in Croatia lately, had major influence to destination choice for 13% of tourists. That influence was more expressed among tourists travelling to destinations in Dalmatia (from 19% to 24% of tourists in County of Dubrovnik-Neretva and County of Split-Dalmatia, respectively). The majority of tourists prefer motorways whenever possible because they want to arrive at destination as soon as possible (64%). Tourists also prefer motorway because of higher level of safety (55%) and because of higher level of service quality of roadside facilities (41%).
Expenditures in Croatia during the journey to coastal destinations	<ul style="list-style-type: none"> Average expenditure per person while travelling to the Croatian coastal destinations was 20 Euro (trip within Croatia, only). The majority of that amount was spent on fuel (8 Euro or 40% on average), road-toll (4.5 Euro or 22% on average) and ferry (2 Euro or 11% on average). Further 15% or 3 Euro per person was spent on food and drinks in roadside facilities; 9% or somewhat less than 2 Euro per person was spent on shopping (in roadside stores or souvenir shops) while the rest (about 0.5 Euro per person) was spent on other things, including overnight.

BUS TOURISTS ON THEIR JOURNEY TO THE CROATIAN COASTAL DESTINATIONS	
Length and duration of trip to Croatian coastal destinations	<ul style="list-style-type: none"> The average length of journey towards coastal destinations in Croatia for those travelling by bus was about 393 km; foreign tourists travelled 409 km on average. The average travel time in Croatia, including all stops, waiting time at border-crossings, ferry and pay toll, as well as time spent on ferry was 7 hours; 7.3 hours for foreign tourists on average. Journey in Croatia was about 31% of total number of kilometers and about 36% of total travel time for foreign bus tourists.
Type of roads used in Croatia	<ul style="list-style-type: none"> Majority of tourists in buses travelled on Croatian motorways (90%) at least part of their trip in Croatia. Out of total number of kilometers in Croatia, about 72% on average was on motorways.
Stops along the roads in Croatia while travelling to the coastal destinations	<ul style="list-style-type: none"> About 81% of tourists in busses stopped in Croatia at least once on their journey to the coastal destinations. The average number of stops was 1.6 (1.2 stops on motorways and 0.4 stops along other roads). Those who stopped at least once, stopped 1.9 times on average. Total duration of stops in Croatia for tourists travelling to the coastal destinations by bus was one hour on average. The average time per stop was 30 minutes. The time during stops bus passengers used mostly for toilet (88%) and rest from driving (57%). About 39% of tourists had drinks while 34% had food in roadside facilities. Shopping was the activity participated by 27% of tourists. Only 11% of tourists visited a tourism attraction on their trip to coastal destinations in Croatia. Tourism attractions included Palace of Dioclecian in Split (56%), national park Plitvice lakes (41%), cathedral of St. Jacobs in Šibenik, city of Zagreb (15%) and others. Recommendation by travel agency was the primary information source about attractions visited.
Satisfaction with offer along the roads	<ul style="list-style-type: none"> Tourists were not very satisfied with any of fifteen elements of roadside offer along motorways, as well as along state, county and local roads in Croatia. The elements tourists were the most satisfied with were sufficiency and the quality of restaurants/café's along state, county and local roads. The worst evaluated element of roadside offer along motorways, as well as along other roads in Croatia was the cleanliness of the roadside toilet facilities.
Expenditures of bus tourists in Croatia during the journey to coastal destinations	<ul style="list-style-type: none"> About 72% of tourists travelling to Croatian coastal destinations by bus realised at least some expenditures along the journey in Croatia. Average expenditure per person while travelling to the Croatian coastal destinations by bus was 11 Euro (trip within Croatia, only). Out of 11 Euro, 3 and 2.3 Euro on average (29 and 21%) were spent on food and drinks in roadside facilities, respectively. Shopping expenditures (in roadside stores or souvenir shops) were 3 Euro (28%) on average, while 2.4 Euro on average (22%) was spent on something else (entrance fees etc.).