

## SUMMARY

<b>TOMAS 2006 National and nature parks</b>	<ul style="list-style-type: none"> <li>• First systematic survey of attitudes and expenditures of Croatian national and nature park visitors.</li> <li>• Conducted in 2006, for the Ministry of the Sea, Tourism, Transport and Development of the Republic of Croatia.</li> </ul>
<b>SURVEY METHODOLOGY</b>	
<b>Survey aims</b>	<ul style="list-style-type: none"> <li>• To collect information on demand and expenditure of visitors to the Croatian national and nature parks in order to provide a baseline information for tourism management and product development in national and nature parks, promotion of protected natural areas and improvement of management practices in these areas.</li> <li>• Ensure comparability of results between the parks.</li> <li>• Develop and pilot-test the survey methodology for implementing continuous research into tourism in national and nature parks of Croatia.</li> </ul>
<b>Area and time frame</b>	<ul style="list-style-type: none"> <li>• Six national parks (Plitvice Lakes, Krka, North Velebit, Paklenica, Brijuni and Kornati) and two nature parks (Kopački Rit and Biokovo).</li> <li>• June – October 2006.</li> </ul>
<b>Survey scope</b>	<ul style="list-style-type: none"> <li>• Based on the review of relevant international and domestic literature and on the TOMAS survey of tourism demand.</li> <li>• The survey instrument included: trip and visit characteristics, satisfaction with the visit, expenditure in the park, socio-economic data and nature-related life-style characteristics.</li> </ul>
<b>Survey instrument</b>	<ul style="list-style-type: none"> <li>• Questionnaire, available in 10 languages.</li> </ul>
<b>Data collection</b>	<ul style="list-style-type: none"> <li>• Personal interview at the end of the visit (at the exit points).</li> </ul>
<b>Population</b>	<ul style="list-style-type: none"> <li>• All visitors to the six national parks and two nature parks included in the survey, from June to October 2006.</li> </ul>
<b>Sample</b>	<ul style="list-style-type: none"> <li>• Stratified random sample (stratified by park).</li> <li>• 2,258 respondents.</li> <li>• Survey results were corrected by 2006 data on number of visitors.</li> </ul>
<b>Presentation of results</b>	<ul style="list-style-type: none"> <li>• All results are analysed and presented by park and by the most important tourist generating markets.</li> </ul>

## MAIN RESULTS

<b>Socio-demographic profile</b>	<ul style="list-style-type: none"> <li>• Among visitors, international tourists prevail (82%), especially in Plitvice Lakes NP (90%) and Paklenica NP (88%).</li> <li>• International tourists are heterogeneous in terms of their country of origin, although somewhat larger proportion of visitors is from Germany (12%), Italy (10%), France, Czech Republic and Poland (about 7% each) followed by Hungary, Slovenia and Great Britain (about 6% each).</li> <li>• Domestic visitors mostly come from the area close to the park visited, while parks with the largest proportion of domestic visitors are North Velebit NP (70%) and Kopački Rit Nature Park (73%).</li> <li>• Most visitors are middle aged (41 years on average), well educated and financially well off.</li> </ul>
<b>Visitor nature-based life-style profile</b>	<ul style="list-style-type: none"> <li>• Only a small proportion of visitors (8 to 9%) belong to the club or society dedicated to the nature/ecology or subscribe to relevant journals/magazines.</li> <li>• For majority of visitors (58%) this was their first visit to the protected natural area in the last 12 months although, at the same time, one-fifth has visited natural/nature parks twice over the same period.</li> <li>• Higher propensity to visit protected natural area have domestic visitors and visitors from Slovenia. Highest proportion of regular national/nature park visitors is observed among visitors to the Paklenica (39%) and North Velebit (38%) national parks.</li> </ul>
<b>Frequency of visit, motives and information source</b>	<ul style="list-style-type: none"> <li>• The first-time visitors to Croatia are more often found among the national/nature park visitors (37% of visitors are first time in Croatia).</li> <li>• Most park visitors are in the park for the first time (73%), while the highest proportion of repeat visitors is found in Kopački Rit Nature Park (39%) and North Velebit National Park (35%).</li> <li>• Main motive for visiting the park is to enjoy the natural beauty of the area (50%) and a desire to simply visit the park (48%), although rest and relaxation is also common (29%).</li> <li>• Of the official communication channels, most commonly used for obtaining information about parks are Internet (33%) and printed material - brochures, poster, and ads (16%). Of informal sources of information, recommendation by friends and relatives (38%) and previous stay (22%) prevail.</li> </ul>
<b>Arriving and visiting the park - main characteristics</b>	<ul style="list-style-type: none"> <li>• Most visitors arrive to the park while in transit (38%) followed by the targeted visit to the park from a place where they are spending holiday (36%). About 13% of visitors made a targeted visit from their permanent place of residence, while about the same proportion is visiting park on an organised round tour.</li> <li>• Most visitors arrive to the park by their own vehicles - car or campervan (70%), accompanied by a partner/spouse (42%), family members (30%) or friends (24%).</li> </ul>

	<ul style="list-style-type: none"> <li>• On average, most stay in the park for half a day (46%) or less (27%). About 10% stay in the park for several days, four days on average. Overnight stays are more frequent in North Velebit (21%), Kornati (15%) and Plitvice Lakes (15%) national parks.</li> </ul>
<b>Activities and expenditure while in the park</b>	<ul style="list-style-type: none"> <li>• Photographing nature (84%), food/beverages consumption in restaurants (38%), visit to the info-center (31%) and shopping in stores (31%) are the most frequent activities.</li> <li>• Each visitor (excluding those staying overnight) spends, on average, 20 euro, of which more than half (54%) for ticket. The least amount spent is on the additional visitor programme - less than 1 euro on average.</li> <li>• The highest expenditure is realised in parks with the highest entry fees and well developed products and services. Thus, the Krka National Park recorded the highest expenditure per visit of 26 euro, followed by the Brijuni National Park with 24 euro and Plitvice Lakes National Park with 17 euro per visit.</li> </ul>
<b>Visitor satisfaction</b>	<ul style="list-style-type: none"> <li>• An overwhelming majority is very satisfied with the overall visit (92%), with the overall attractiveness of the park (89%) and the 'value for money' (83%).</li> <li>• Visitors were most impressed by the untouched, wild nature, beauty of the waters, and variety and richness of flora and fauna.</li> <li>• Visitors are particularly satisfied with the way parks are kept clean and tidy, with the professionalism and friendliness of their staff, directional signage and interpretation within the park and quality of food and beverage services.</li> <li>• Visitors are only slightly less satisfied with the additional products and services offered, souvenirs available, sufficiency of information prior to the visit, washroom facilities (cleanliness, availability) and parking.</li> <li>• Crowdedness in the park is experienced by 62% of visitors, of which 12% states that it affects them adversely. About the same proportion (61%) experiences congestion/crowdedness at the entrance/exit points, of which 9% are annoyed by it.</li> </ul>
<b>Intention to visit Croatian national/nature parks</b>	<ul style="list-style-type: none"> <li>• Visitors are more inclined to visit, in the next two years, national parks rather than the nature parks. The highest proportion intent to visit, over the next two years, Plitvice Lakes NP (22%) and Krka NP (25%), followed by the island national parks - Kornati (17%), Mljet (16%) and Brijuni (15%).</li> </ul>