

institut za turizam 

STAVOVI I POTROŠNJA
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U HRVATSKOJ

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KULTURNI TURIZAM

Zagreb, srpanj 2009.

EXECUTIVE SUMMARY

TOMAS 2008 Cultural tourism

- First systematic survey of attitudes and expenditures of visitors to Croatian cultural attractions and events.
- Conducted in 2008, for the Ministry of the Tourism of the Republic of Croatia in cooperation with the Cultural Tourism Advisory Committee of the Croatian National Tourism Board.

SURVEY METHODOLOGY

Survey aims

- To collect information on demand and expenditure of visitors to the Croatian cultural attractions and events in order to facilitate decision making in relation to cultural tourism product development and promotion.
- Develop and pilot-test the survey methodology for implementing continuous research of cultural tourism demand in Croatia.

Area and time frame

- 37 cultural attractions (16 heritage sites, 9 museums/galleries and 12 cultural events) evenly distributed between coastal and continental counties.
- July - October 2008.

Survey scope

- Based on the review of relevant international and domestic literature and on the TOMAS survey methodology.
- The survey instrument included: socio-demographic profile of cultural tourist, motivation for visiting cultural attraction or event, satisfaction with the visit, propensity to visit other cultural attractions and events, trip characteristics and expenditure.

Survey instrument

- Questionnaire, available in 11 languages.

Data collection

- Personal interview at the end of the visit (at the exit points).

Population

- All non-resident visitors to the 37 cultural attractions and events included in the survey, from July to October 2008.

Sample

- Quota sample of 2,450 respondents; 1,699 respondents to cultural attractions and 751 to events; 50 to 70 respondents per attraction/event.

Presentation of results

- All results are analysed and presented overall, by the attraction type (heritage sites, museums/galleries and cultural events) and location (coastal and continental counties).

MAIN RESULTS

Socio-demographic profile

- Middle aged (47%) and younger visitors (30%) prevail, with slightly greater proportion of men (53%). Visitors to museums and galleries are slightly older than average, while the younger visitors are found among those visiting events.
- Cultural tourists are well educated with tertiary education (38%) or post-secondary diploma (24%). A majority (55%) is reporting monthly household income between 1,000 and 3,000 euro. Those visiting museums and galleries are reporting higher, while those visiting events lower income than average.
- Cultural tourists are mostly foreign visitors (62%) from a wide variety of countries, mostly from Italy (15%), Germany (14%), France (9%) and UK (9%). Among domestic tourists regional visitors prevail (44%).
- Cultural tourists are mostly staying in the town where cultural attraction/event is located (43%) or are excursionists from their place of permanent residence (26%).
- Among foreign cultural tourists there is a greater proportion of those in the first visit to Croatia (30%) in comparison to the summer tourists along the coast (19%).

Attitudes to the cultural attraction/event visited

- Most visits to a particular cultural attraction/event are driven by a desire to learn about culture, history and heritage (26%), coupled with the image/reputation of the attraction (18%), curiosity (18%) and desire to socialise with the members of their travel party (17%). The socialising dimension of motivation is more prominent among event visitors, while the learning component is the most important for those visiting museums and galleries.
- Cultural tourists tend to gather information about cultural attraction/event a year in advance (46%) or when arriving in a destination (26%). Recommendation by friends, relatives or local people is most frequently relied upon source of information. Of the formal information channels, Internet (21%), printed promotional material (18%), radio/TV (16%), travel guide books (14%) and newspapers/magazines (14%) are most commonly used.
- Majority of cultural tourists (59%) are first-time visitors to cultural attraction/event while 22% are in the second visit. Repeat visitors are more frequently found among those visiting events (52%).
- For a vast majority of cultural tourists their visit is either exceeding (48%) or meeting (47%) expectations. They are especially satisfied with the quality of exhibits/event program that offers a good opportunity to learn, professional staff and the cleanliness of the facilities. Only few aspects attract lower visitor approval - road signage and availability of information before departure as well as once upon arrival in a destination.

Attitudes about Croatian cultural tourism product

- Satisfaction with the visits to the attraction/event spills over to other cultural attractions and events as, following the visit, most visitors reported increased level of interest for visiting similar attractions and events while in Croatia (51%) or the level of their interest remained the same (45%).

- Most visitors have already visited or plan to visit profane (65%) and sacral (64%) heritage sites, museums/galleries (59%) and cultural events (42%). About one thirds are also visiting performing art events and cultural routes. A majority (60%) expressed interest for participating in creative workshops/seminars of which the most popular are those on gastronomy (24%) and archaeological excavations (21%) as well as participation in harvesting (23%).
- Most visitors identify Croatia with the rich cultural and historic heritage (84%), welcoming and friendly atmosphere (82%), relaxed lifestyle (75%), unique customs and gastronomy (72% each), wealth of museums and galleries (71%) and lively atmosphere (70%). About 50 to 60% associate Croatia with festival and events, rich contemporary arts and culture and as a good destination for culture motivated trips.

Trip characteristics

- One third of visitors can be considered purposeful, culture motivated visitors that either travel specifically to visit a cultural attraction/event or are on a culture motivated holiday. The events draw the largest proportion (46%) of culture motivated visitors, followed by heritage sites (34%) and museums/galleries (30%). Likewise, cultural attractions and events in the continental part of the country report much higher proportion of culture motivated visitors (49%) in comparison to those along the Adriatic (27%).
- About 70% are overnight visitors spending, on average, 8 nights on the trip. They mostly hire private accommodation (32%), stay with friends/relatives (25%) and use hotel (22%).
- A vast majority (85%) is organising the trip individually. Those who use travel agency, do so mostly for accommodation (76%) and transport (74%).
- They travel in a company of their spouse/partner (33%), family members (32%) or with friends (23%), mostly relying on car (68%).

Expenditure

- Cultural tourists on the overnight trip spend, on average, 45 euro per person per day.
- Those cultural tourists in paid, commercial type of accommodation spent, on average, 57 euro per day, of which 4 euro or 7% of their total daily expenditure is spent directly on culture. Those staying in their own holiday houses/apartments as well as those visiting friends and relatives spend, on average, 20 euro per day, of which 2.5 euro or 13% of their total daily expenditure on culture.
- Day-visitors spend, on average, 28 euro per trip, of which 3.5 euro or 13% of their total daily expenditure directly on culture.
- Visitors to museums and galleries spend the most - 57 euro per day on overnight trips and 35 euro on day-trips.
- Overnight visitors to cultural attractions and events in the continental counties that stay in paid accommodation are spending more than those along the coast - 65 euro on average compared to 55 euro in coastal counties. In contrast, those on a day visit to the cultural attractions and events in the continental counties are spending twice less per day than their counterparts along the coast - 23 euro in comparison to 47 euro for those along the coast.