### 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.

**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.