

EXECUTIVE SUMMARY

TOMAS SUMMER 2010 SURVEY	<ul style="list-style-type: none">▪ Survey on attitudes and expenditures of tourists in Croatia in Summer 2010▪ The only longitudinal survey on various characteristics of tourists in Croatia, conducted for the eight time by the Institute for Tourism since 1987
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TOMAS SUMMER 2010 - SURVEY METHODS

Research goals	<ul style="list-style-type: none">▪ Identification of tourists' profile as a basis for segmenting the tourist market▪ Identification of the main advantages and disadvantages of the Croatian tourism▪ Data on tourist expenditures▪ Continuous tracking of the tourism demand trends
Area frame	<ul style="list-style-type: none">▪ Seven coastal counties
Time frame	<ul style="list-style-type: none">▪ June to September 2010
Survey instrument	<ul style="list-style-type: none">▪ Questionnaire
Method	<ul style="list-style-type: none">▪ Personal interview
Sample size	<ul style="list-style-type: none">▪ 4973 respondents interviewed in 85 destinations
Population	<ul style="list-style-type: none">▪ 4 types of accommodation facilities: hotels, holiday dwellings, campsites, private accommodation facilities (houses/apartments/rooms)▪ 15 countries of origin: Croatia, Germany, Slovenia, Italy, Czech Republic, Austria, Poland, Slovakia, Netherlands, Hungary, Russia, France, Great Britain, Bosnia and Herzegovina, Serbia and a group of other countries
Sample design	<ul style="list-style-type: none">▪ Stratified random sampling▪ Strata:<ul style="list-style-type: none">• County• Type of accommodation facilities• Country of origin▪ Sample frame – tourist overnights in 2009▪ Representative sample on a county level, type of accommodation facility and country of origin

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| Sample - weighting | <ul style="list-style-type: none"> ▪ All survey results were corrected by 2010 data on tourist overnights by the county, type of accommodation facility and country of origin |
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TOURIST ACCOMMODATION AND TRAVEL DEMAND IN COASTAL COUNTIES (2007 - 2010)

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| Tourist accommodation | <ul style="list-style-type: none"> ▪ 802 thousands permanent beds, every other bed registered in private accommodation (49%), 27% in camps, and 12% in hotels |
| Travel demand | <ul style="list-style-type: none"> ▪ 9.4 million tourist arrivals and 54.2 million overnights in coastal counties; 96% of total overnights in Croatia ▪ 88% overnights in 2010 were recorded from June to September ▪ 36% of total overnights were recorded in private accommodation (houses/apartments/rooms), 25% in hotels, 25% in camp sites ▪ Leading foreign markets in 2010 were Germany, Slovenia, Italy, Austria and the Czech Republic |
| Changes in tourist accommodation and travel demand in relation to 2007 | <ul style="list-style-type: none"> ✓ 2% increase of total number of permanent beds; 6% increase in hotels; 3% increase in campsites ✓ Overnights realized in July and August increased from 64% in 2007 to 66% in 2010 ✓ Number of overnights in hotels is slightly lower (0.4%), while the increase is realized in private accommodation (10%) and campsites (6%) ✓ Overnights spent by domestic tourists during the observed period decreased by 15% while foreign overnights increased by 6% |

TOMAS SUMMER 2010 MAIN SURVEY RESULTS AND TRENDS

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| Socio-demographic profile | <ul style="list-style-type: none"> ▪ Dominant share of tourists between 30-49 years of age (56%), 25% of tourists are 50+, while 19% are younger than 30. Tourists are on average 41 years old ▪ About 60% have two-year college or university degree ▪ Nearly half (47%) of guests are coming from households with monthly income of 2,000 Euro or less, 36% from households with 2 to 3 thousand Euros, and 17% from households with incomes above the 3,000 Euros per month |
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**Motivation,
 loyalty and sources
 of information**

- Travel party – families (52%), followed by those coming with partner only (33%) and friends or acquaintances (16%)
- ✓ In summer 2010 tourists' profile has not changed significantly in comparison to summer 2007
- ✓ The share of family arrivals increased from 47% in 2007 to 52% in 2010
- Primary motive for coming to Croatia during summer is rest and relaxation at the seaside (74%) followed by pleasure and fun (44%). Three motives, new experiences, gastronomy and visiting natural attractions attract 25%, 22% and 21% of tourists, respectively
- Croatia has the greatest share of loyal foreign tourists – those who visited Croatia three or more times (73%); 40% has already been more than twice in destination where interviewed; for 14% summer vacation in 2010 has been the first visit to Croatia
- Tourists' previous visits (32%), media (29%), the recommendations of friends and relatives (28%) and Internet (27%) are the most important sources of information
- ✓ 'Rest and relaxation' at the seaside is still the main motive for visiting Croatian seaside destinations, increasing from 62% in 2007 to 75% in 2010. The slight increase of gastronomy is also noted while all other motives recorded a decrease in comparison to 2007

**Travel
 characteristics**

- ✓ The share of 'loyal' foreign tourists, those who visited Croatia three or more times is increased from 60% in 2007 to 73% in 2010
- Tourists are mostly coming by car (84%) followed by airplane (8%) and bus (5%)
- Travel agent services are used by 34% of tourists, mainly for accommodation booking
- ✓ Slight increase of car arrivals (from 81% in 2007 to 84% in 2010). Increase in use of low-cost airlines

**Stay in
 a destination**

- Tourists spent on average 9.5 overnights in destination. The most frequent stays are those from 4 to 7 overnights (47%)
- About 69% of guests are organizing their meals outside the accommodation facility; one fifth (19%) are using half-board option

Attitudes	<ul style="list-style-type: none"> ▪ Dominant summer activity is swimming/bathing followed by visits to café-bars, cake shops and restaurants, shopping, as well as going on nature walks (activities recorded by more than 70% of tourists) ✓ The trend of increasing the share of short visits on average (4 to 7 overnights) is continuous as well as the trend of decreasing the share of tourists who stay 11 or more nights in destination. The average stay in the coastal counties decreased from 11.7 overnights in 2004 to 9.8 overnights in 2007 and 9.5 overnights in 2010 ✓ Growing share of tourists who are organizing their meals outside the accommodation facility (from 59% in 2007 to 69% in 2010) ✓ Range and the intensity of many activities of tourists in Croatia is slightly decreasing compared to the 2007 survey ▪ Tourists staying in coastal destinations in summer 2010 were extremely satisfied with their overall stay. For most of the individual elements of tourism supply the guests have expressed a high or very high degree of satisfaction ▪ Guests are most satisfied with the beauty of the nature and scenery and the suitability for a family holiday, social elements like personal safety, friendliness of staff and local population, as well as quality of food within accommodation facility and restaurants outside the accommodation facility ▪ Guests are least satisfied with elements concerning the quality of tourism destination product (culture manifestations, beaches, shopping, local transport) ✓ On average, guests' satisfaction with tourism product increased significantly in comparison to 2007 survey. Elements of tourism destination product are still ranked last on the satisfaction scale
Competitiveness of Croatian summer tourism	<ul style="list-style-type: none"> ▪ Advantages - natural beauty, environmental preservation, picturesqueness and tidiness of town/resort, personal safety and friendliness ▪ Disadvantages - all aspects concerning destination tourism supply elements (pleasure and fun, sport and recreation, shopping possibilities)
Expenditures in destination	<ul style="list-style-type: none"> ▪ Average daily expenditure during the summer months is 58 Euros ▪ Out of 58 Euros, 43 Euros (74%) is spent on hospitality services (accommodation services 49%, food within accommodation services 9% and other food and beverages in restaurants and bars outside accommodation service 16%) while 15 Euros (26%) is spent for all other services

- ✓ Average daily expenditures in summer 2010 is about 5% higher than those realized in 2007. This increase is the result of increased expenditures for hospitality services by 13% while all other expenses decreased (shopping expenditures decreased by 17% while expenditures for all other services such as sports, recreation, culture and entertainment decreased by 11%)
- ✓ The share of expenditures for hospitality services increased from 68% in 2007 to 74% in 2010, while the share of expenditures for shopping decreased for 3 percent as well as the share of expenditures for other services.