

A profile of visitors to Croatian cultural attractions and events

Projects and activities of the Institute for Tourism, Zagreb



In Croatia, the planned approach to development of cultural tourism started with the *National cultural tourism development plan* that the Institute for Tourism has drafted in 2002. Following the strategic recommendation, in 2008 the Institute has conducted the first survey of attitudes and expenditure of visitors to cultural attractions and events, sponsored by the Ministry of Tourism and in cooperation with the Croatian National Tourism Board. This was a part of our TOMAS family of market research surveys focusing on specific market segments (sun and sea, cruise, yachting, transit, nature, capital city).

The survey was based partly on the TOMAS methodology and partly on the recommendation of ATLAS cultural visitor survey. Survey population included all non-resident visitors to the 37 attractions and events, evenly distributed between coastal and continental parts of the country, over peak summer and autumn shoulder season. The quota sample was used with 1750 respondents to cultural attractions and 750 to events with 50 to 70 respondents per attraction/event. In total, 2500 respondents participated in the study.

The results of the survey give us a comprehensive profile of visitors to the Croatian cultural attractions and events. The visitors are mostly middle aged (47%) or younger (30%), with slightly greater proportion of men (53%). They are well educated, with 62% having some kind of higher education. A majority (55%) is reporting a monthly household income between 1,000 and 3,000 Euro.

Reflecting orientation of the Croatian tourism towards foreign markets, foreign visitors prevail (62%) but the national structure of visitors to cultural attractions and events is not reflecting the national structure of tourists in general. Among foreign visitors to cultural attractions and events, visitors from Italy (15%), Germany (14%), France (9%) and UK (9%) prevail.

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%).

In terms of motivation, most visits to cultural attractions/events 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 socialize with the members of their travel party (17%).

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. Satisfaction with the visits 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%).

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 festivals and events, rich contemporary arts and culture and as a good destination for culture motivated trips.

Their expenditure varies depending on the length of stay and type of accommodation used. On an overnight trip, the average daily expenditure is 45 Euro of which 4 Euro (7%) is spent on culture directly. Day-visitors spend, on average, 28 euro per trip, of which 3.5 euro or 13% of their total daily expenditure directly on culture.

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