

# T1.1.1 MARKET RESEARCH AND DATA COLLECTION

---

Template for the T1.1.1 Market research and data  
collection

P5 ARGONAUTA: Evaluation of Tourism Destination of  
*Murter Island*

Draft version

09.01.2020

---



## ARGONAUTA

## Table of contents

### **1. BRIEF INTRODUCTION**

### **2. METHODOLOGY OF RESEARCH**

#### *SAMPLE SIZE*

### **3. OVERVIEW OF TOURIST ATTRACTIONS AND TOURISM SECTOR OF THE DESTINATION**

#### *3.1 IDENTIFICATION OF TOURIST ATTRACTIONS OF THE DESTINATION*

#### *3.2 CURRENT SITUATION OF TOURISM SECTOR IN THE DESTINATION*

### **4. EVALUATION OF TOURIST DESTINATION FROM THE POINT OF VIEW OF TOURISTS AND BUSINESSES OPERATING IN TOURISM SECTOR**

#### *4.1. EVALUATION OF TOURISM DESTINATION FROM TOURIST POINT OF VIEW*

#### *4.2. EVALUATION OF TOURISM DESTINATION FROM PRIVATE ACTORS POINT OF VIEW THAT OPERATE IN TOURISM SECTOR*

### **5. CONCLUSIONS**

## 1. BRIEF INTRODUCTION

*(A summary of deliverable 1.1.1 about the project the aim of research, partners involved etc. Is the same for all Partners and will be prepared by University of Vlora.)*

This research was conducted in the framework of project **“TANGRAM Transnational pArks aNd Gardens Resources in Adriatic and ionian tourist Marketplace”**, under acronym TANGRAM funded by ERDF, under INTERREG V-B Adriatic-Ionian ADRION Programme 2014-2020.

Partners from countries- Italy, Slovenia, Croatia, Greece, Serbia, Bosnia Herzegovina, and Albania- will provide data on their tourist destinations thanks to market research which will be used to evaluate the tourist destinations, their weaknesses in relation to the access to the parks through a SWOT analyses. Taking into consideration the weaknesses identified, the partners will examine the tourism strategies and branding of the regional competitors, along with relevant good practices at local, regional, national, and international level, in order to benchmark the project partners and then formulate the joint strategy and action plan and build the ADRION network

The purpose of deliverable 1.1 “Market research and Data analysis” part of Activity T 1.1- “Market Research Competition Analysis” was the evaluation of the tourist destination of Murter Island from the point of view of tourists and tourist businesses in order to identify the natural, cultural, historical and archaeological tourist potentials that this destination offers.

To have a current view of this tourist destination, the work started with the collection of secondary data.

The analysis has the following structure:

- description of the methodology applied
- assessment of natural, cultural, historical resources tourist attractions
- evaluation of current situation of tourism sector as tourist destination
- travel motivations of tourists
- means of transport used

- information provided from strategic documents and research papers in the field

An analysis of the data provided through online questionnaires addressed to domestic and foreign tourists as well as businesses operating in the sector has provided information for assessing the tourist destination and identifying its weaknesses. A SWOT analysis provides a review of needs and challenges for the management of a tourist destination.

## 2. METHODOLOGY OF RESEARCH

*(Methodology of research will be prepared by University of Vlora. In general, is the same for all partners with some specifics of each partner.)*

The applied methodology is function of the goals of the project. First, the research is based on the review of the literature and the analysis of secondary data related to the current situation of the tourist destination and the impact of the tourism sector on local economic development. The questionnaires were used as the primary source of information, identified as one of the most common methods for collecting data in empirical research. There are several advantages using the questionnaire as a primary source to collect data, such as:

- The uniformity of questions which helps the data analysis.
- Using specific questions to obtain specific information.
- Access to a large number of participants in a short period of time.
- The ease of data processing and analysis through processing programme.
- Avoiding the researcher's influence while completing the questionnaire.

Drafting the questionnaire, a special attention was paid to the main focus of the research related to the analysis of the tourism sector in the perspective of the tourists and companies operating in this industry. One of the basic principles during the construction of the questionnaires related to tourists and business that operate in tourism sector was the inclusion of the variables that are directly related with the tourism sector. The construction of the questionnaires is based on a wide literature review on tourism issues. In addition, the content of the questionnaires has been consulted according to the opinion of experts in the field of the research. During the testing phase of the questionnaires, interviews were conducted with experts in the field of tourism, which are used to improve the understanding of questions. Some questions were modified in terms of the terminology used and the specifics of the survey. Referring to the main purpose of the study, the research is relied on the perspective of the main actors of this industry: tourists and tourist companies.

**Two questionnaires** were design to collect data regarding to, evaluation of tourist destination:

1. The first one addressed citizen/ tourists that have visited this tourist destination, and another one addressed business/private actors that operate in tourism industry. The first section of the questionnaire addressed to foreign and domestic tourists enable the collection of general information about the population of the study such as: the city/state where the tourists come from, age-group of tourists, gender and their level of education. In addition, this questionnaire includes questions to gather information about: means of transport used by tourists to arrive in the destination, type of accommodation, nights of staying in the destination, the most frequented seasons, the reasons and source of information the tourists use to visit the destination, their level of satisfaction regarding to what is offered in this destination, factors that affect tourists choice of the destination, factors that they considering when decide to choose a destination.
2. The second questionnaire aims to collect data about the current situation of tourism sector, from private actors/businesses point of view. The first section of the questionnaire addressed tourist companies allows to gather general information about the population of the study such: the years of the company operating within tourism industry, the location where the company performs, the type of activity, the number of employees, rate of occupancy in some cases, and main group of clients. Furthermore, the questionnaire includes questions that seek to gather information on the perception of companies about the reasons why tourists should visit the tourist destination. An important set of questions included in the questionnaire is related to the opportunities and advantages of doing business in tourism industry as well as the perception of the companies about the infrastructure and facilities in the tourist destination, the quality of services, and the existing difficulties of doing business, and the expectations from public institutions to develop the tourism sector.

## **SAMPLE SIZE.**

As we are studying the current situation of tourism industry in a specific destination from the point of view of tourists and the companies operating in this industry, we can say about the latter the population size is limited. The target population for tourists are foreign and domestic tourists who have visited Murter island, the same the target population of the tourist companies mainly offering accommodation services, maritime infrastructure and coastal facilities, and recreational activities.

There are several methods used to calculate the sample size depending on the type of data or study design.

One of the most common way to determine the sample size is based on the required accuracy. The accuracy has to do with the level of the confidence. The smaller the  $\alpha$ , the higher the margin of error. To determine the required sample size, it is used the formula which depends on the confidence level, the margin of error, and the value Z corresponding to the required level of confidence. Implementing the sample size formula, first, we need to determine the boundary error and the evaluation of specific weight p. If it is difficult to evaluate an accurate assessment for the specific weight p, it is recommended to use the value equal to 0.5 or 50%. This value provides no greater mistake than it allowed. If we use the level of confidence of 95% and the margin of error 5%, the sample size will be calculated by the following formula:

**p)** the percentage of the population that belongs to a certain category (1-p), % the population that does not belongs to the category of study

(1)  $n = p\% \times (1-p) \% \times (Z/e\%)^2$  Z (normal distribution value), constant value that corresponds to the confidence interval; {95%, Z (95%) = 1.96}

e) The margin of error percentage While the adjusted sample size of finite population is calculated:

(2)  $n_1 = n / [1 + (n/N)]$

**n1** regulated selection size

**n** the initial sample size found from formula (1) N total population

Regarding to the population size of foreign and domestic tourist during a year, it is larger than 100.000 tourists. Using link <https://surveysystem.com/sscalc.htm> or formulas above for sample size calculator, it will be 384. Considering the minimum acceptable response rate based on online survey that is 33%, the sample size for tourists that visit this destination should be 120 tourist and this value is statistically representative. The questionnaire addressed tourists was designed through Google Forms and the link was distributed by phone, email, and social media. The number of the questionnaires answered and completed regularly by the tourist was 157.

Referring to the number of active companies, the sample size:  $50\% \times 50\% \times (1.96/5\%)^2 = 384.16$

While the adjusted sample size is:  $n_1 = n / [1 + (n/N)] = 384.16 / [1 + (384.16/168)] = 116$   
To enable more representative and reliable results, we have tried to distribute the questionnaire to almost all accommodation companies, the best restaurants in the city which have a good image and popularity in the area, and the travel agency. Questionnaires were sent to 25 companies. Of these, 14 returned were answered and regularly completed the questionnaire. The questionnaire was designed through Google Forms and the link was distributed by email. The response rate calculated as the total responded companies to the total number of companies contacted, is 0.56% compared to the adjusted size of the selection. This value is statistically acceptable to continue the analysis, and it figures that the sample size is representative of the population. The questionnaires were completed during the period April-May 2020.



### 3. OVERVIEW OF TOURIST ATTRACTIONS AND TOURISM SECTOR OF THE DESTINATION

#### 3.1 IDENTIFICATION OF TOURIST ATTRACTIONS OF THE DESTINATION: KORNATI ISLANDS & MURTER

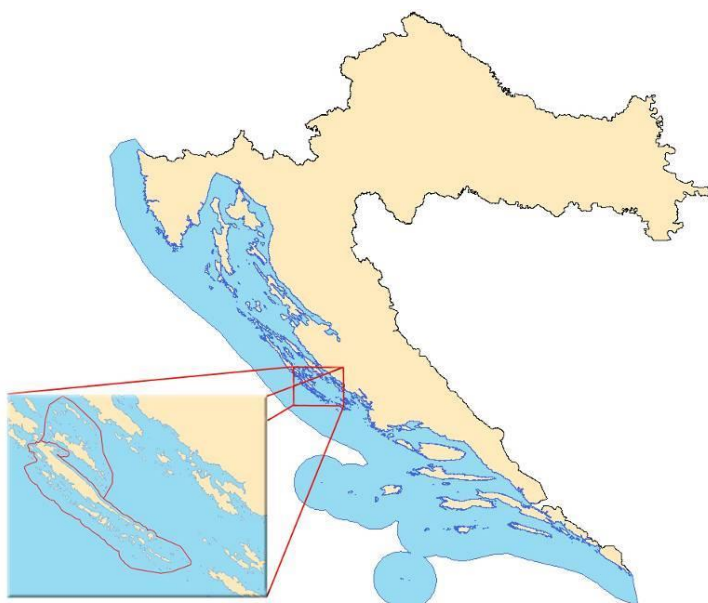
*(A brief summary of the natural, cultural, historical resources of tourist offer)*

##### **3.1.1 Murter and the Kornati Islands**

The main attraction of the municipality of Murter is the archipelago of Kornati which falls within its territory. The island of Murter is part of the archipelago.

The Kornati archipelago is situated in the Croatian part of the Adriatic Sea, in the Central Dalmatia region, to the west of Šibenik in Šibenik-Knin County.

**Fig 3.1 Kornati Archipelago placement in Croatia**



The Kornati archipelago comprises a total of 152 islands located between Zadar and Sibenik, 89 of them form the National Park. Kornati Islands National Park was established in 1982.

It is one of the most attractive stretches of sea on the Dalmatian coast for boaters, divers and for all those who love unspoiled nature. Characteristic of the archipelago are the rocks overlooking the open sea called "crowns", below the surface of the water the rocks sink for over 100 m.

On the Kornati islands there is no permanent population and there are no tourist facilities such as hotels: however, there are private houses - the so-called "fishermen's houses" - used mostly during the summer season which are equipped with a tank to collect drinking rainwater, generator autonomous or gas for refrigerators and electricity, or solar systems (recent evolution). There are no shops on the Kornati, but there are some excellent restaurants to eat fish.

***Fig. 3.2 Kornati Islands***



The tourist facilities are concentrated on the island of Murter which in fact hosts camping sites, hotels, and private houses but also restaurants, travel agencies and other tourist services.

The island is connected to the mainland by a bridge in a place Tisno and is easily accessible by car or bus. Today, it has 5,100 inhabitants.

Their main occupation is tourism; besides tourism the people of the island is engaged in fishing, agriculture and even shipbuilding. Places on the island are Betina, Tisno, Jezera and Murter which is also the biggest and the oldest settlement on the island.

#### **4.1.2 What to do in the Kornati islands:**

##### **Diving and snorkeling**

Autonomous divers with regular qualification or license can dive in the waters of the Kornati independently. No permits are required for snorkelling, only mask and snorkel!

Scuba diving outside of organized and approved groups is prohibited. There are 9 areas in the National Park where you can dive and they are Kornat (Opat - Tanka Prisliga), Samograd, Okljuc, Mala Panitula, Vela Panitula, Rasip, Kasela, Mana, Borovnik. It is not possible to remove anything (except garbage!) And it is forbidden to disturb marine organisms in any way.

##### **Animal watching**

The emerged part of the Kornati Park is as interesting as its underwater part. Although the islands seem deserted, they are actually rich in both plant and animal life and in addition to rodents, amphibians and reptiles there is also a predator: the marten!

There are more than 800 species of plants, many interesting birds (peregrine falcons, eagle owls, sparrow hawks ...) that should not be disturbed.

## Hiking on the Kornati islands

On the islands there are panoramic points and natural viewpoints that are not difficult to reach thanks to the paths traced by shepherds to look after the flocks that were raised on the islands.

## Events

During the peak tourism season the Tourist Board of Murter-Kornati Municipality, the Kornati National Park Public Institution and local associations organise several events, the most important are:

- **Gospa o'Tarca**

Pilgrims make the tradition voyage by boat from the shores of the island of Murter to the small church of Our Lady of Tarac (Gospe o'Tarca) in an inlet on the Kornati Islands that was once a sanctuary for herdsmen and farmers. Every year, on the first Sunday in the month of July, locals and numerous tourists participate in this attractive maritime and sacral happening.

- **Pilgrimage to the church of the Holy Cross**

(Svetog Križa, island of Žut). Staged every year on the 14th of September on the Feast of the Cross – a pilgrimage and mass are organised with a festival in one of the inhabited inlets on the island of Žut.

- **Days of the Lateen Sail**

Is the largest culture tourism event in September in Murter and includes a series of educational and entertainment programmes organised by the Lateen Sail Society – it features a culture and arts programme, a rowing regatta (for minors, women and men), the Lateen Sail Regatta and the Little Lateen Sail and workshops for children. The aim of the Lateen Sail Regatta is to revive memories of the way of life at sea and the use of the specific local boats. Upholding the tradition of preserving old boats characteristic of the Croatian Adriatic began, in fact, on the island of Murter.

- **Kornati National Park Anniversary**

Every year on the 13th of August, the Kornati National Park Public Institution organises a celebration of the anniversary of Kornati National Park in Murter. Along with the entertainment programme, visitors have an opportunity to sample the traditional cuisine of the Sustainable Tourism Development Strategy for the Broader Kornati National Park Area.

### 3.2 CURRENT SITUATION OF TOURISM SECTOR IN THE DESTINATION

*(Statistics about incoming of foreign tourist, domestic tourists, motives of travel, model of transport used, tourists according region etc)*

Data on the accommodation capacities in the Kornati Islands are recorded as whole of the Municipality of Murter-Kornati and of the settlement of Betina, rather than for the separate. In the territory of the Municipality of Murter-Kornati and the settlement of Betina accommodation capacities include hotels, privately-owned accommodation providers, camps, and resorts.

The total number of beds in all accommodation capacities is **3,302**.

In the records on the number of overnight stays at the Tourist Board of Murter-Kornati Municipality and the settlement of Betina the following numbers were registered:

**Table 4.2.1: The number of overnight stays in Murter, the Kornati Islands and Betina (Source: Tourist Board of Murter-Kornati Municipality, Betina Tourist Board)**

YEAR	2011	2012	2013	2014	TOTAL
<b>Murter-Kornati</b>	239,171	246,800	239,092	232,189	<b>957,252</b>
<b>Betina</b>	107,449	123,060	177,547	175,185	<b>583,241</b>

The table below evidences that Murter and Kornati in 2017 where the less visited island/archipelagos of Croatia, registering the lowest number of arrivals (less than 116,000), but also with a better performance in terms of overnights compared to Korčula and Cres.

**Table 4.2.2: Tourist traffic realized on the Croatian islands**

	ISLANDS ARRIVALS (in 000)			OVERNIGHTS (in 000)		
	2016	2017	INDEX 2017/ 2016	2016	2017	INDEX 2017/ 2016
Krk	754.6	797.9	105.7	4,391.9	4,695.6	106.9
Pag	371.4	402.4	108.3	2,485.8	2,714.5	109.2
Lošinj	272.8	286.3	104.9	1,877.6	1,961.5	104.5
Rab	259.0	274.2	105.9	1,935.1	2,015.2	104.1
Hvar	280.4	312.6	111.5	1,469.1	1,517.9	103.3
Brač.	243.1	248.5	102.2	1,699.5	1,697.3	99.9
Cres	117.3	122.6	104.5	840.1	883.3	105.1
Murter	107.6	115.8	107.6	823.2	891.4	108.3
Korčula	124.1	153.3	123.5	698.8	883.8	126.5

## 4. EVALUATION OF TOURIST DESTINATION FROM THE POINT OF VIEW OF TOURISTS AND BUSINESSES OPERATING IN TOURISM SECTOR

### 4.1 EVALUATION OF TOURISM DESTINATION FROM TOURIST POINT OF VIEW

*(Include findings provided from data collected through tourist questionnaires, presented in tables or figures, and interpretation of findings)*

Referring to the evaluation of the tourist destination of Murter Island, the object of study were local and foreign tourists who visited this destination. The ratio of foreign tourists and domestic tourists interviewed is approximately 47% to 53%. This refers to the period April-May 2020 of data collection through online questionnaires, coincides with the Covid19 situation that closed the borders and business activities in most part of the world.

#### **4.1.1. Sample description**

The sample of tourists is made up of 156 people: 83 are domestic tourists, 73 are foreigners, of them 41 are Slovenians. The 32 foreign tourists, not Slovenian, come from a lot of European countries, among them there is a little prevalence of Austrians and Poles.

In the last column the share of the different countries on the total sample is reported.

**Tab. 4.1 Country origin of the tourist interviewed**

Countries	HR*	SLO**	Other***	Total	%
A			7	7	4%
BiH			1	1	1%
CH			1	1	1%
D			5	5	3%
F			2	2	1%
HR	83			83	53%
I			1	1	1%



N			1	1	1%
PL			7	7	4%
RSB			1	1	1%
SE			2	2	1%
SK			2	2	1%
SLO		41		41	26%
UK			2	2	1%
Total	83	41	32	156	100%
	53%	26%	21%	100%	

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

#### **4.1.2 Demographic features**

The female component of the sample is prevailing: 58%, biased in this direction are the samples of domestic and other tourists.

**Tab. 4.2 Gender share of the sample**

	<b>Dom*</b>	<b>SLO**</b>	<b>Other***</b>	<b>Total</b>
Female	61%	49%	59%	<b>58%</b>
Male	39%	51%	41%	<b>42%</b>
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

The most represented group by age are young adult between 36 and 45 y.o. (37%), followed by tourists between 46-55 y.o. (29%).

The Croatian sample includes high number of youngsters: 16-35 y.o. are the 27%.

**Tab 4.3 Age structure of the sample**

	<b>Dom*</b>	<b>SLO**</b>	<b>Other***</b>	<b>Total</b>
16-25 yo	13%	2%	9%	<b>9%</b>
26-35 yo	14%	17%	18%	<b>16%</b>
36-45 yo	40%	34%	34%	<b>37%</b>
46-55 yo	25%	39%	28%	<b>29%</b>
56-65 yo	5%	7%	9%	<b>6%</b>
over 65 yo	1%	0%	0%	<b>0%</b>
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

The education level of people included in the sample is high: bachelors and masters represent the 60% of the total.

**Tab 4.4 Education level of sample participants by origin Country**

	<b>Dom*</b>	<b>SLO**</b>	<b>Other***</b>	<b>Total</b>
Bachelor	43%	54%	31%	<b>44%</b>
High school	40%	37%	31%	<b>37%</b>
Master	14%	7%	31%	<b>16%</b>
Secondary school	0%	0%	3%	<b>1%</b>
No Answer	2%	2%	3%	<b>3%</b>
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

The group of males has an education level higher than the females, but the difference between the genders is not truly relevant.

**Tab 4.5 Education level of sample participants by gender**

	<b>Female</b>	<b>Male</b>	<b>Total</b>
Bachelor	41%	50%	<b>45%</b>

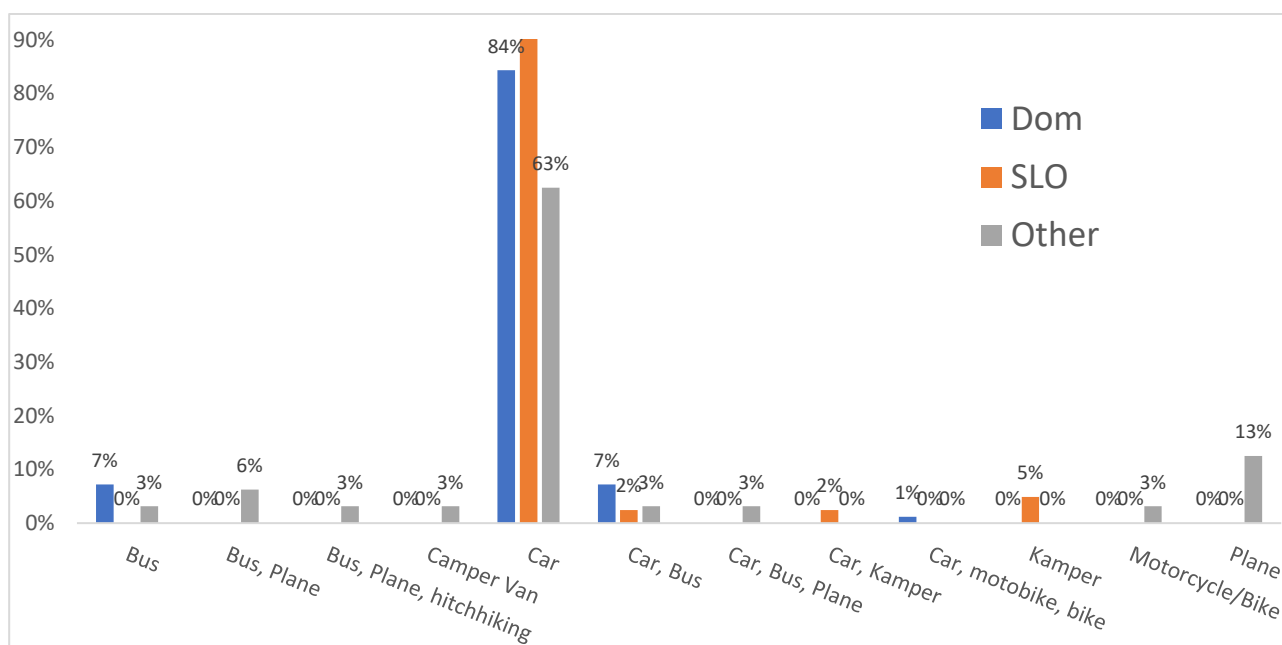
High school	42%	33%	<b>38%</b>
Master	16%	17%	<b>16%</b>
Secondary school	1%	0%	<b>1%</b>
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

#### **4.1.3. Travel behaviour - Means of transport**

The preferred mean of transport is clearly the car (81%): 90% of Croatians and 84% of Slovenians use it for arriving to Murter. Also, among the «other» foreigners, car is pretty popular (63%) but for moving they combine different means where the plane has a significant role (13%).

The bus is important for domestic tourists (7%) but it is often combined with other means of transport mainly by foreign tourists.

**Fig 4.1 Means of transport used to get to Murter**



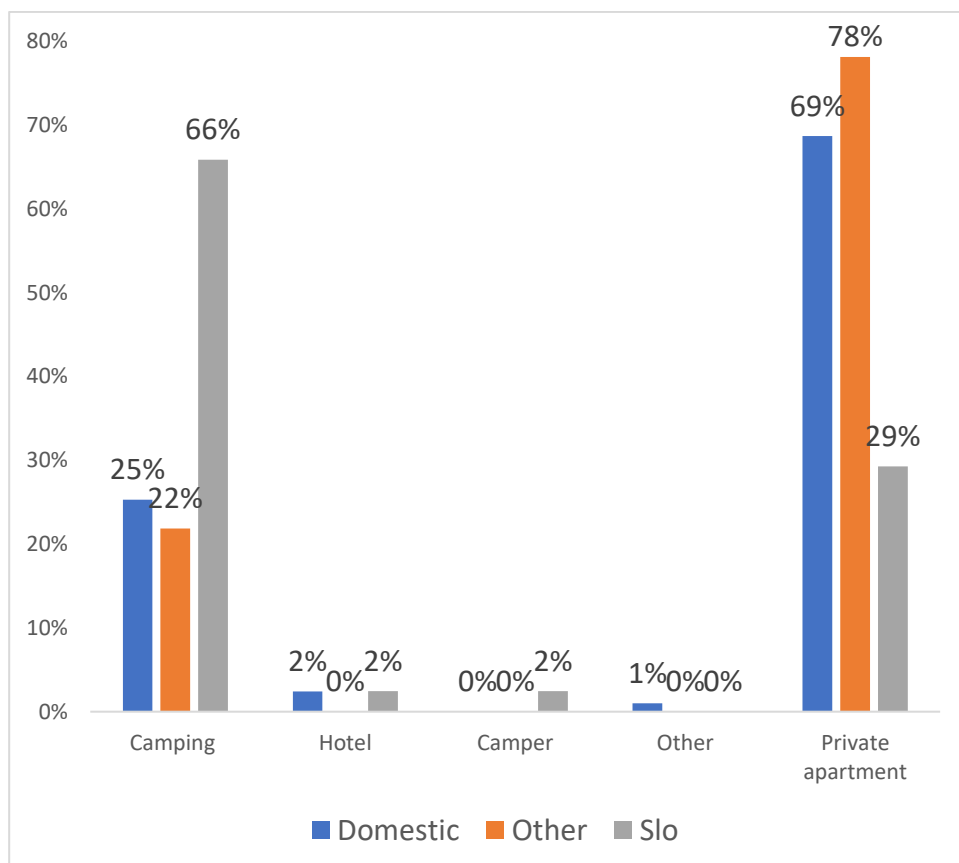
#### **4.1.4 Travel behaviour – Accommodation**

The private rooms are the preferred accommodation (60%) selected by domestic tourists (78%) and other foreigners (69%).

The camping is in the second position (35%). It is attended mainly by Slovenian tourists.

Negligible is the weight of the other kinds of accommodation

**Fig 4.2 Accommodation in Murter**



#### **4.1.5 Travel behaviour – Length of Stay and holiday organization**

Murter is definitely not a resort for short stays: only 3% of respondents stay up to 3 nights.

A little higher is the percentage of those who spend about a week on the island (13%)

**Tab 4.6 Length of stay by origin Country**

	<b>Domestic</b>	<b>Other</b>	<b>Slo</b>	<b>Total</b>
1-3 nights	4%	6%	0%	<b>3%</b>
4-7 nights	19%	13%	2%	<b>13%</b>
More than 7 nights	77%	81%	98%	<b>83%</b>
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

Almost all Slovenians stay in Murter longer than 7 nights, but also other groups also prefer the long stay. Its global share is 83%.

The holidays are organized autonomously by the tourists, only an exiguous 6% of «other» foreign tourists ask for the support of a travel agency.

**Tab 4.7 Holiday organization by Country**

	<b>Domestic</b>	<b>Other</b>	<b>Slo</b>	<b>Total</b>
Self-organized	99%	94%	100%	98%
Through an agency	1%	6%	0%	2%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

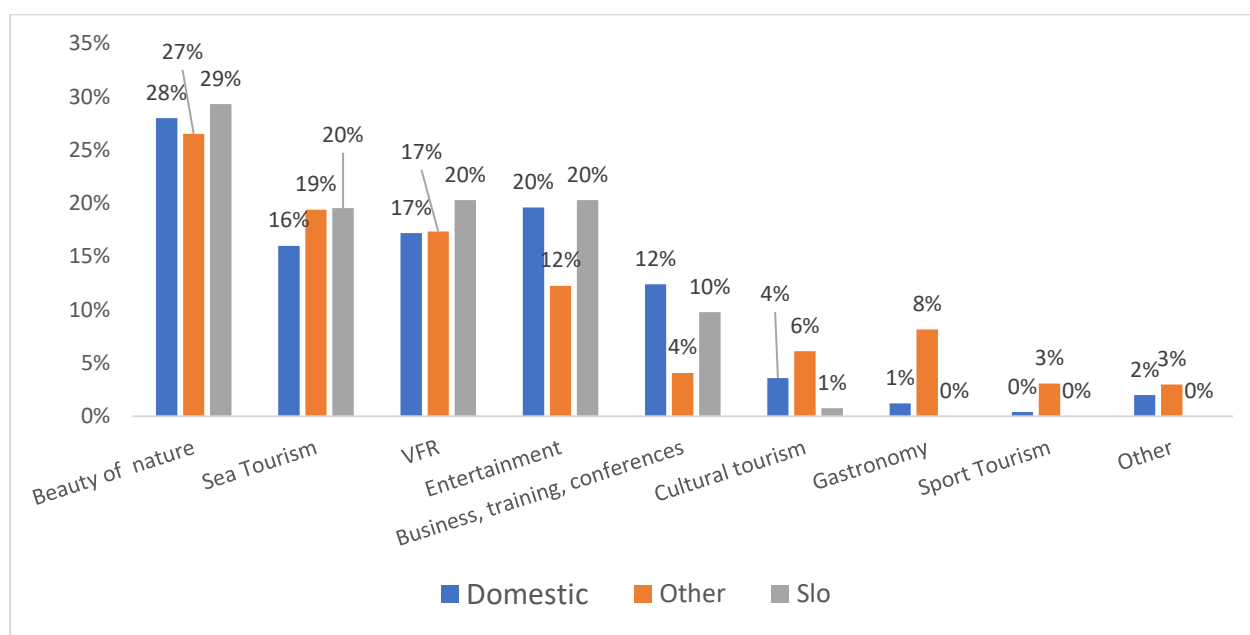
#### **4.1.6 Tourism Motivation**

The graph below clearly shows the tourism motivations according their priority order. It's possible identify four groups of motivations:

- **Beauty of the nature** is at the top, alone and this reason is shared by the 28% of respondents.
- **Sea holiday, VFR and Fun** are in the second position with similar percentages, around 18%.
- The third group includes Business Trips only

The last one is residual: it joins together Culture, Gastronomy, Sport and Other. The only percentage significant is the gastronomy and identify a specific interest of «other» foreign tourists.

**Fig 4.3 Motivations for taking holiday in Murter**



The first three motivations have remarkably similar percentages, not affected by the discriminant variable (origin Country).

This is extremely interesting because it means that Beauty of nature, Sea tourism and VFR are the key drivers of Murter destination choice, shared by all guests of the island.

The age of the respondents is not a discriminating parameter. In other words, there does not seem to be a significant relationship between the age and the reasons for vacation.

**Tab 4.8 Holiday motivations by age**

	<b>16-25</b>	<b>26-35</b>	<b>36-45</b>	<b>46-55</b>	<b>56-65</b>	
	<b>y.o.</b>	<b>y.o.</b>	<b>y.o.</b>	<b>y.o.</b>	<b>y.o.</b>	<b>Total</b>
Beauty of nature	28%	29%	27%	29%	29%	<b>28%</b>
Sea tourism	17%	13%	18%	19%	19%	<b>18%</b>
VFR	15%	13%	18%	21%	19%	<b>18%</b>
Business, training, conferences	11%	15%	8%	10%	10%	<b>10%</b>
Fun	20%	19%	19%	18%	13%	<b>18%</b>
Cultural tourism	6%	7%	3%	1%	3%	<b>3%</b>
Sport Tourism	0%	0%	2%	1%	0%	<b>1%</b>
Gastronomy	4%	4%	2%	1%	6%	<b>2%</b>
Recommendations of friends or relatives	0%	0%	2%	1%	0%	<b>1%</b>
Shopping	0%	0%	1%	0%	0%	<b>0%</b>
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

The columns of percentages do not change substantially from one age group to another. It means that the Murter's tourists, regardless of age and nationality, are a very homogeneous population from the point of view of holiday reasons.

#### **4.1.7 Information channels**

Murter Island is a kind of club. The main information channel is «personal experience» (60%), which means that most of the tourists interviewed are regular visitors to this destination.

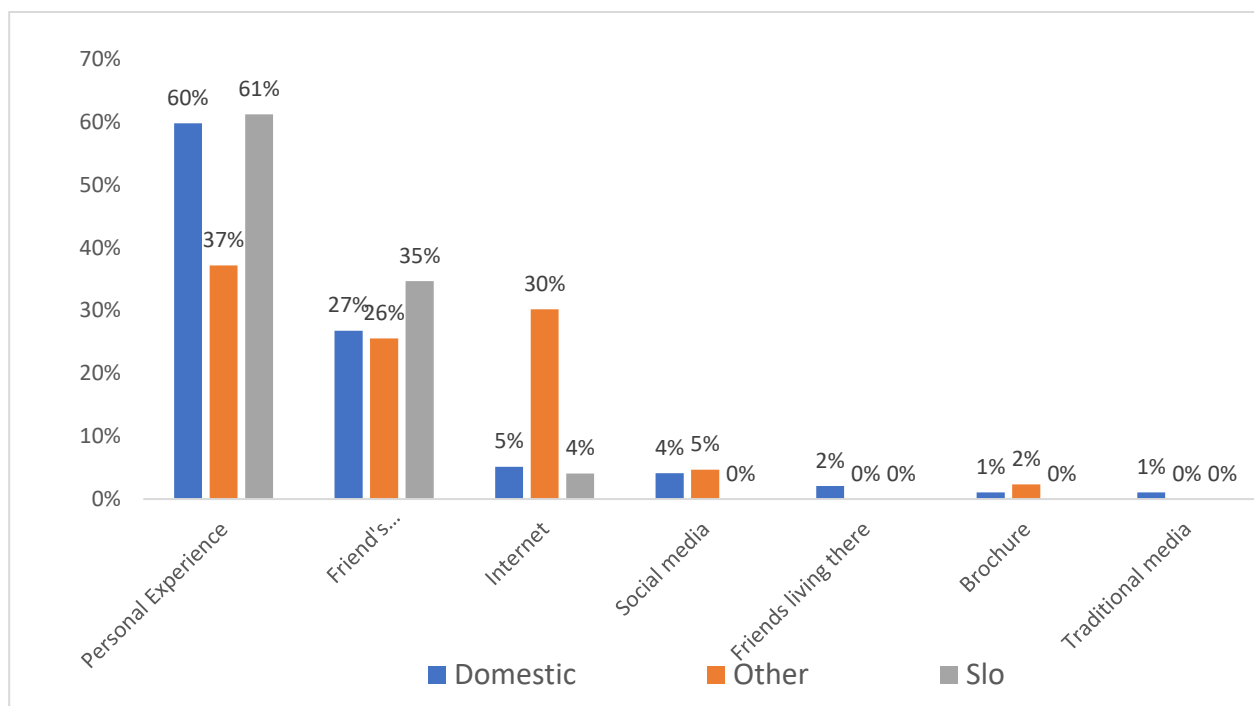
If they are not regulars of Murter they are on the island on the recommendation of friends who have already spent their holidays there. (29%).

A partial exception to the model described are the "other" foreigners in which a more traditional approach to seeking information for the holiday is recognizable:

- personal experience and friends are important but less than for Croatians and Slovenians,

- internet has a key weight, at least equal to the two previous information channels (30%)
- finally, social media also plays some marginal role.

**Fig 4.4 Information channels of Murter holidaymakers**



On this last regard, it is worth asking whether the latter are not overrated, and above all the famous influencers: their weight is very far from the double figure.

#### **4.1.8 Season preferred, and not preferred, for holiday**

The preferred holiday season is, as expected, summer, but there is a big difference in the percentage of those who prefer it between domestic tourists (93%) and foreigners (76%), (Slovenes and other nationalities).

A significant share of the latter (16%) say they prefer the autumn season, while 22% of Slovenes would orient themselves towards spring.



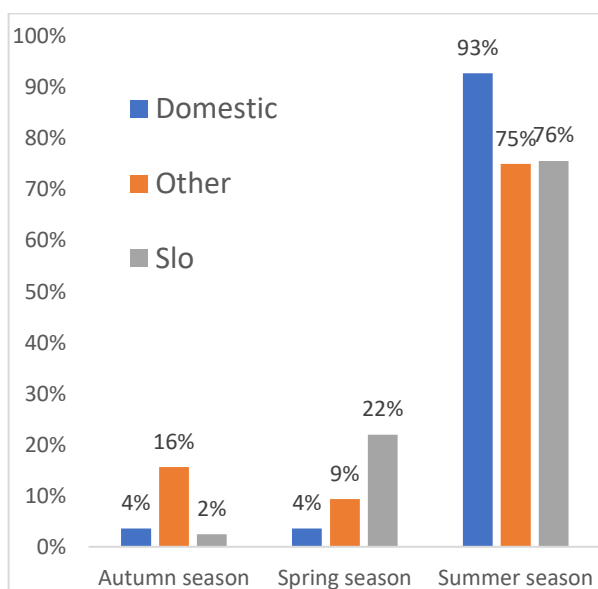
The reason why summer is preferred for almost 50% of Croatians is to be found in work commitments, in the lack of income or days of vacation, followed, but very far apart, by the lack of services on the island.

It is interesting to observe how the Slovenian component of foreign tourism has a fluctuating behaviour: at times it is similar to domestic tourism in other cases to the foreign one.

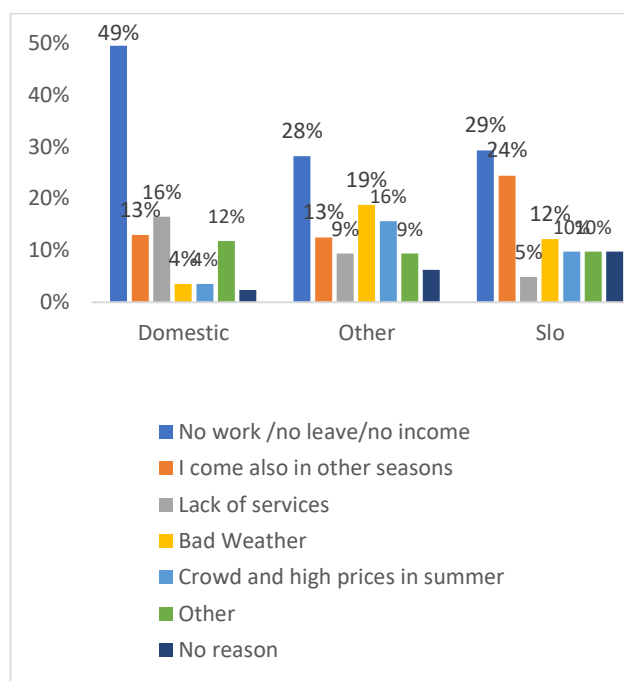
In this case we are in the second situation. In fact, the work commitments in the two groups are important (28%) but not as prevalent as for the Croatians, the lack of services in Murter and bad weather are key problems.

It is important to note that over 20% of Slovenians prefer off-season tourism.

**Fig. 4.5 Which season do you most often choose for tourist trips?**



**Fig. 4.6 What is the reason for not visiting the destination in other seasons?**

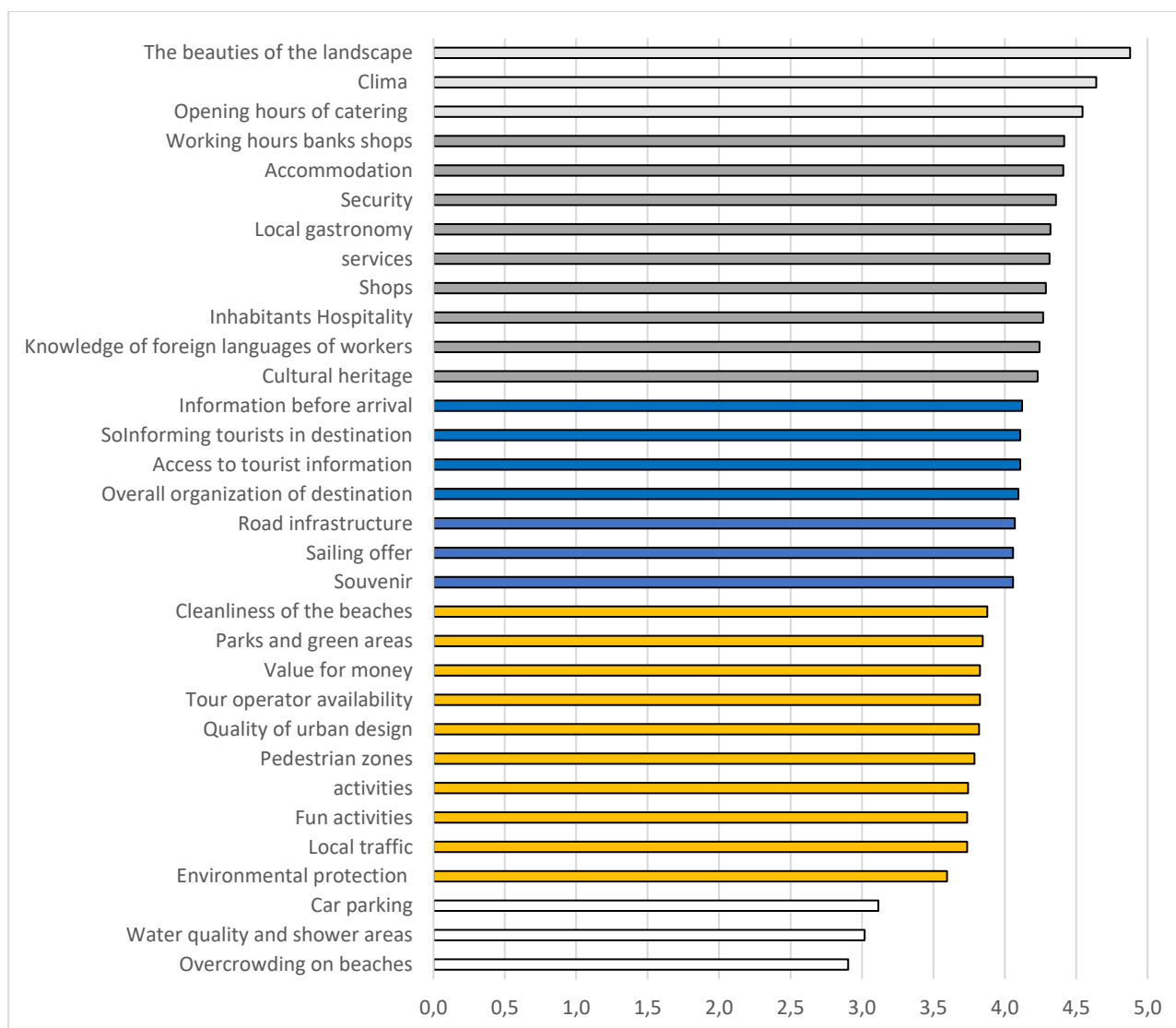


#### **4.1.9 Importance of several factors that influenced Murter as holiday destination**

The graph highlights 6 groups of elements with different weights in the choice of Murter as holiday destination.

The first group plays a key role in the decision and is made up of: natural beauty, climate and opening hours of banks and shops i.e. the comfort with retail:

**Tab 4.9. Importance of several factors as influencers of holiday destination selection**



The second group includes the basic of tourist stay: accommodation, gastronomy, inhabitants' hospitality, cultural heritage, and familiarity with foreign language of tourist workers.

In the middle there are the info services.

In the lowest position all items identifying the topics of urban quality.

Above we have shown the graph with the average values of the satisfaction of Murter tourists for a wide range of services offered.

**Tab 4.10 Importance of several factors as influencers of holiday destination selection by origin country**

Domestic	Other	SLO
Overcrowding on beaches	Water quality and shower areas	Overcrowding on beaches
Car parking	Overcrowding on beaches	Car parking
Water quality and shower areas	Car parking	Environmental protection
Environmental protection	Environmental protection	Local traffic
Fun activities	Value for money	Tour operator availability
activities	Tour operator availability	Quality of urban design
Pedestrian zones	Parks and green areas	Pedestrian zones
Local traffic	Local traffic	Water quality and shower areas
Quality of urban design	activities	Value for money
Cleanliness of the beaches	Access to tourist information	Parks and green areas
Value for money	Quality of urban design	activities
Parks and green areas	Cleanliness of the beaches	Fun activities
Tour operator availability	Information before arrival	Cleanliness of the beaches
Souvenir	Informing tourists in destination	Road infrastructure
Road infrastructure	Knowledge of foreign languages of workers	Sailing offer
Overall organization of destination	Fun activities	Local gastronomy
Information before arrival	Pedestrian zones	Souvenir
Sailing offer	Sailing offer	Overall organization of destination

Inhabitants Hospitality	Souvenir	Informing tourists in destination
Informing tourists in destination	Cultural heritage	Cultural heritage
Access to tourist information	Overall organization of destination	Access to tourist information
Shops	Road infrastructure	Knowledge of foreign languages of workers
services	Shops	Shops
Cultural heritage	Inhabitants Hospitality	services
Knowledge of foreign languages of workers	Accommodation	Information before arrival
Security	services	Security
Local gastronomy	Security	Working hours banks shops
Accommodation	Working hours banks shops	Climate
Working hours banks shops	Local gastronomy	Accommodation
Opening hours of catering	Opening hours of catering	Inhabitants Hospitality
Climate	Climate	Opening hours of catering
The beauties of the landscape	The beauties of the landscape	The beauties of the landscape

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

In the previous table we have reported the same items in increasing order of satisfaction: from the poorest to the highest.

As can be seen, Murter's visitors, regardless of nationality, are a very homogeneous group.

We underline: the island is loved for its beauty but the environmental quality in its various aspects does not seem up to par. The criticism in this regard is unanimous and heavy as indicated by the scores assigned to these topics.

#### **4.1.10 What about the future? Would you like to visit this destination again?**

Only 5 people say they will not return to Murter next year and 4 say they do not know.

These are small numbers equally distributed among Croatians, Slovenians, and tourists of other nationalities.

**Tab 4.11 Would you like to visit Murter island again?**

	Domestic	Other	SLO	Total
I don't know	1%	6%	2%	3%
No	2%	6%	2%	3%
Yes	96%	88%	95%	94%
Total	100%	100%	100%	100%

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

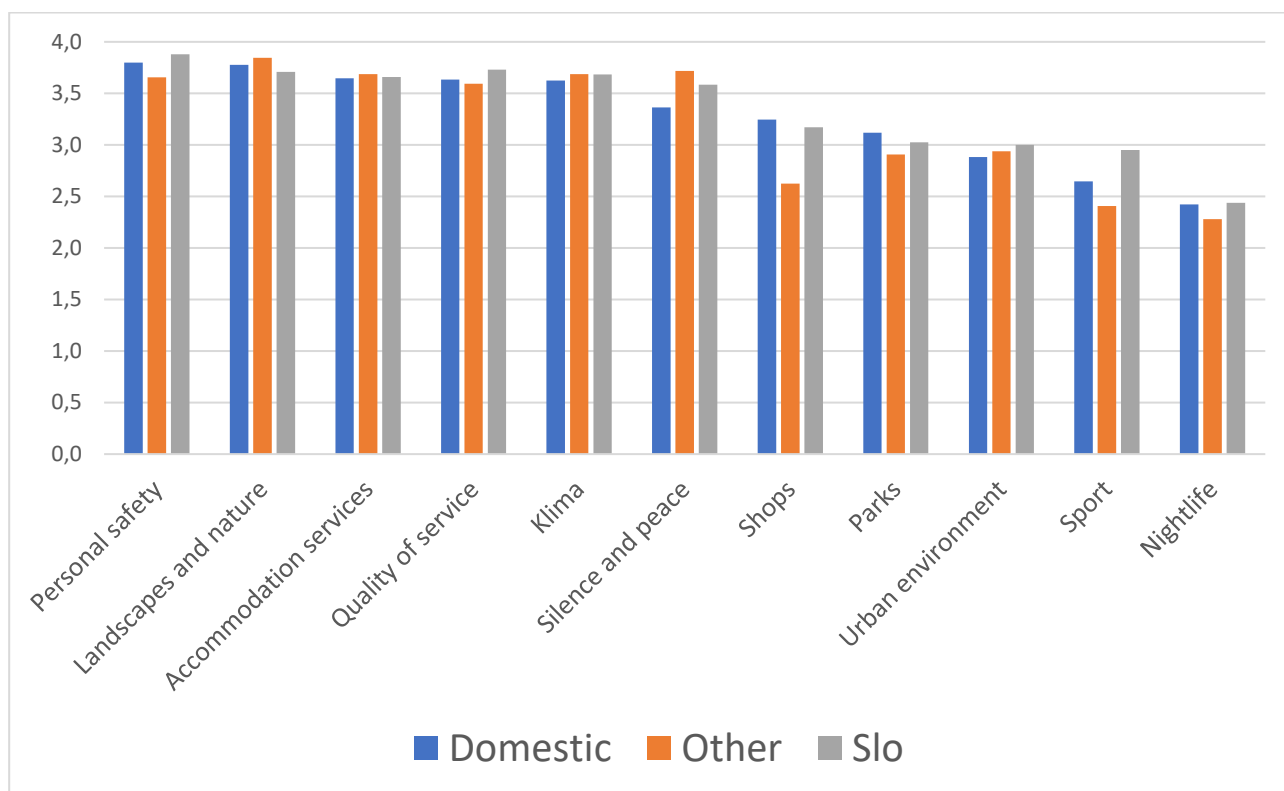
#### **4.1.11 The key variables for deciding a holiday destination**

The variables, that play a key role when the tourist of Murter decide the holiday destination, are:

- Personal safety
- Landscaper & nature
- Accommodation
- Quality of services
- Climate
- Silence and peace

In this group of items, the origin country isn't a discriminant variable, while it plays a more relevant function in the second group of variables, more connected to the individual lifestyle.

**Fig. 4.7 The importance of the following elements when deciding on a holiday destination**



#### **4.1.12 Would you recommend this tourist destination to your friends and relatives?**

Only 4 people will not recommend spending a holiday in Murter and 6 are unsure about doing so.

Small numbers equally distributed among Croatians, Slovenians, and tourists of other nationalities.

#### 4.12 Would you recommend spending holidays in Murter?

	Domestic	Other	Slo	Total
I don't know	4%	6%	2%	4%
Not	1%	3%	5%	3%
Yes	95%	91%	93%	94%
Total	100%	100%	100%	100%

\* Dom = Domestic tourist; \*\* SLO = Slovenian Tourist; \*\*\* Other = Other foreign tourists

##### **4.1.13. For what reasons you do not want to visit this tourist destination again**

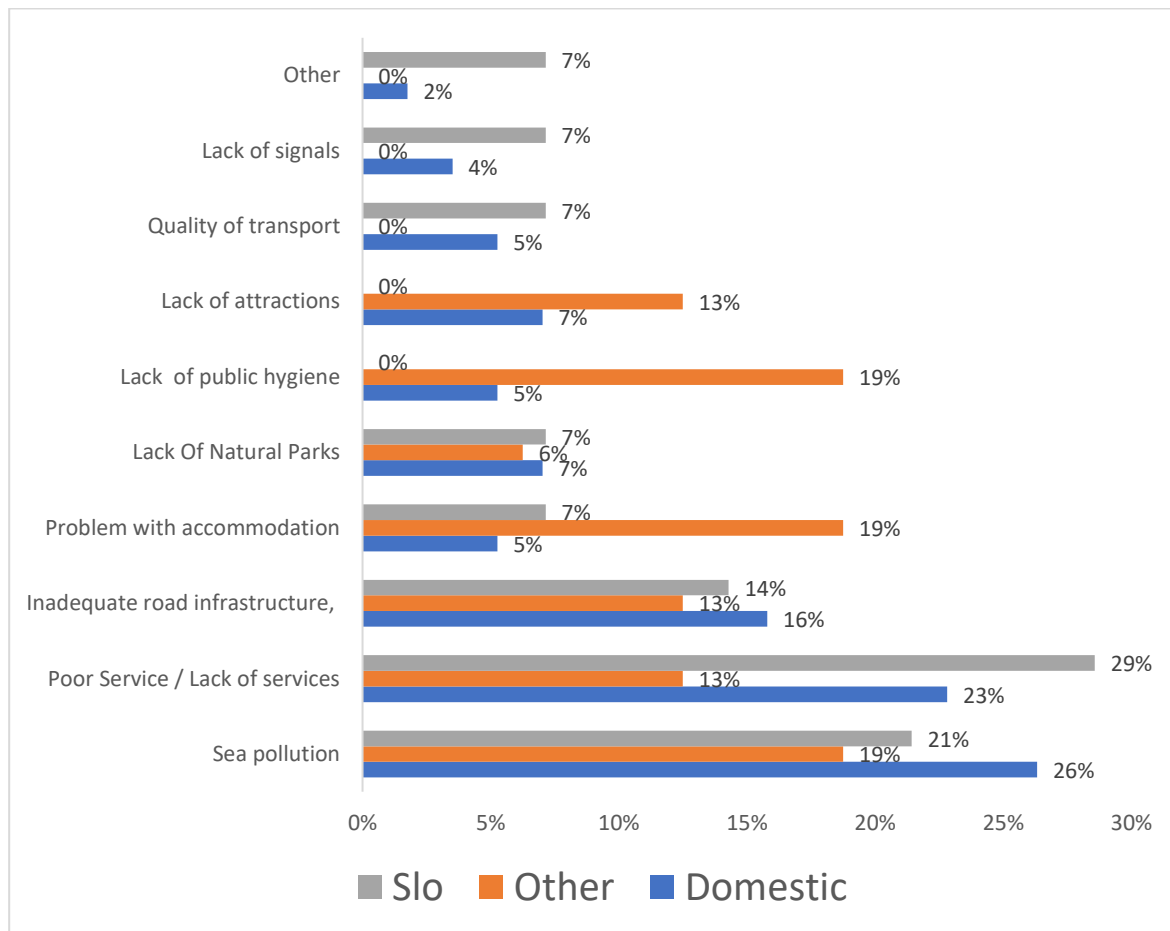
Tourists on holiday in Murter are particularly attracted to the beauties of nature.

Consequently, they are sensitive to what can threaten them. A strong dissatisfaction with environmental protection and pollution had already emerged previously (see page 14), reinforced by the lack of public hygiene reported above all by "other" foreign tourists.

The theme re-emerges also in this case as the main motivation (25% of the interviewees) that can push the island's guests to other destinations.

A second issue to which the inhabitants should pay attention concerns the lack of road infrastructures. Considering that more than 80% reach the island by car, this criticality should be treated very carefully.

**Fig. 4.8 Motivations for not visiting Murter as holiday destination.**





## 4.2 EVALUATION OF TOURISM DESTINATION FROM PRIVATE ACTORS POINT OF VIEW THAT OPERATE IN TOURISM SECTOR

*(Include findings provided from data collected through business questionnaires, presented in tables or figures, and interpretation of findings)*

### **4.2.1. Sample description**

14 private companies were interviewed in Murter island. They operate in the sectors described in the table below.

**Tab. 4.13 companies interviewed by sector and group assigned**

Sector	Number of Companies	Group
Agrotourism	2	1
Accommodation + mixed activities	4	1
Restaurant	1	2
Shops	6	2
Real estate	1	1
<b>Total</b>	<b>14</b>	

For a better understanding of the information provided by the survey we split the respondents in two groups:

- 1 companies dealing with accommodation (it includes also real estate company): Accommodation (group 1)
- 2 other companies mainly single business: Other (group 2)

The companies were set up for the most part between the 1998 and 1985. Only 5 out of 14 were set up in the last 10 years. All companies are based in Murter island.

**Tab 4.14 Year of company foundation**

	Accommodation	Other	Total
1985		2	2
1989	1		1
1990	1		1
1995		1	1
1996	1		1
1997		2	2
1998		1	1
2010	1		1
2012		1	1
2015	1		1
2017	2		2
<b>Total</b>	<b>7</b>	<b>7</b>	<b>14</b>

The legal form of companies looks like the typical one of an economy in transition: from initial forms, such as sole proprietorships (7 companies), to more advanced legal forms, such as joint stock companies (7). In any case the companies interviewed have a little size the number of employees: less than 9 for 12 of them. In one case the company has between 10 - 20 employees and the biggest over 50 employees.

**Tab 4.15 Legal form of companies interviewed**

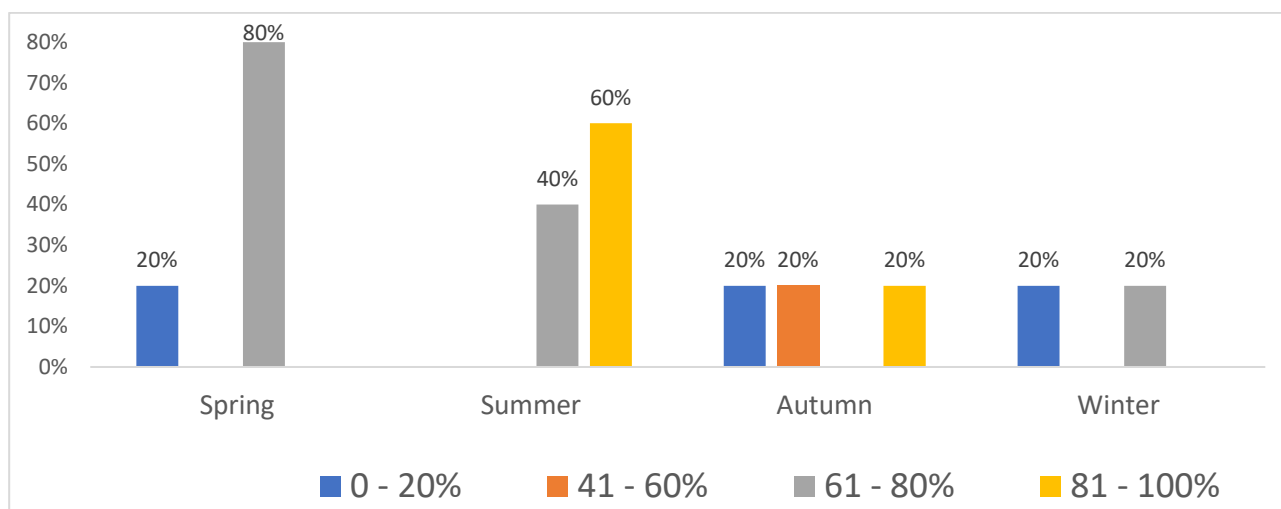
	<b>Craft</b>	<b>Limited company</b>	<b>Private company</b>	<b>Total</b>
Accommodation, & Other Activities	2	2		4
Agrotourism	1		1	2
Caffe bar		1		1
Coffee shop	1			1
Electronic service	1			1
Food shop	1			1
Jewellery store		2		2
Real Estate Agency		1		1
Restaurant	1			1
<b>Total</b>	<b>7</b>	<b>6</b>	<b>1</b>	<b>14</b>

Summer is the season in which 13 companies interviewed, out of 14, work the most. There is only one company who declares spring as season with top activity: it is the supplier of electronic devices.

In summer, the hospitality companies achieve the highest occupancy rates. In this season the 60% of accommodation activities has an occupancy rate of over 81% and the 40% overcome the 61%.

This last level of occupancy rate is achieved in spring by only 80% of the accommodation units. This percentage drops dramatically in autumn and winter.

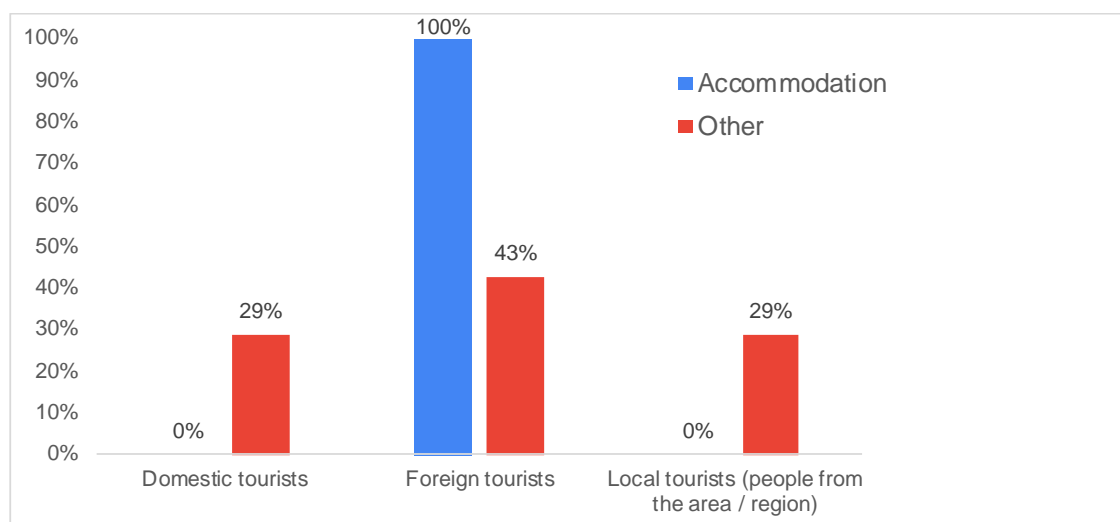
**Fig 4.9 Percentage of accommodation companies with the indicated occupancy rates per season**



#### **4.2.2. Market & marketing**

Foreign tourists are the most important (maybe exclusive?) clients of the accommodation sector of Murtar.

**Fig 4.10 Customers of tourist businesses of Murtar by origin country**



The «other» activities have a wider market composed by domestic tourists (29%), foreigners (43%) and locals (29%), but also in this case the foreigners are the prevailing group.

**Tab. 4.16 Number of companies with their own website**

	Accommodation	Other	Total
No	2	5	7
Yes	5	2	7
Total	7	7	14

Only 7 companies out 14 have their own internet site. All sites, except only one, have contents in Croatian and English and two also in other languages.

**Tab. 4.17 promotional actions of interviewed companies**

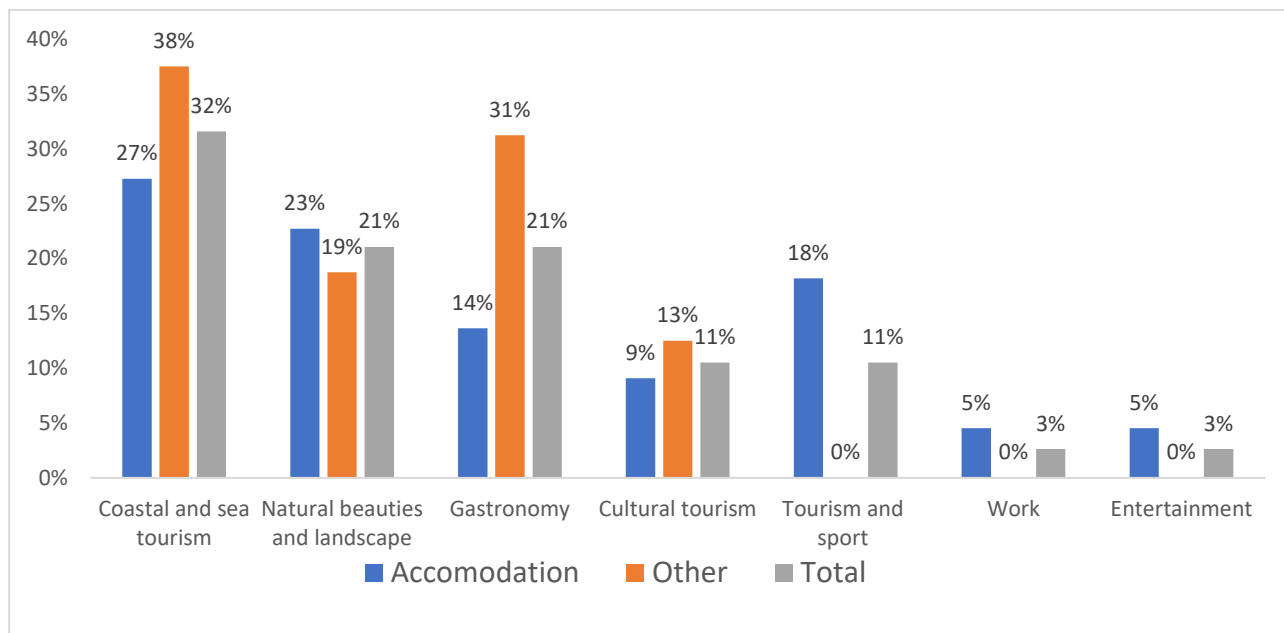
	Accommodation	Other	Total
Nothing	2	3	5
Social networks	2	1	3
Traditional media	2	1	3
Billboard		1	1
Flyer		1	1
Other	1		1
Total	7	7	14

5 companies do not implement any promotional actions, the other 9 use a wide range of tools from flyers to social media.

#### **4.2.3. Why to have holiday in Murter**

The hoteliers and the managers of other tourist services have more or less the same point of view on the reasons that push tourists to spend their holidays in Murter.

**Fig 4.11 Motivations pushing the tourists to have holidays in Murter according the point of view of the tourist entrepreneurs**



In their view, coastal and maritime tourism, natural beauty, and gastronomy play a major role in attracting visitors.

Housing managers also emphasize sport (18%) but it is all about the details.

#### **4.2.4. Attractions to visit in Murter**

**Tab. 4.18 Attractions to visit in Murtar according the suggestions of tourist entrepreneurs**

Attractions	Number of quotations
National park Kornati	10
National park Krka	5
Muzej brodogradnje Betina	4
Sibenik	4
Split	3
Park prirode Vransko Jezero	3

Domace znamenitosti	2
Kolentum	1
Podvrške beach	1
Slanica beach	1

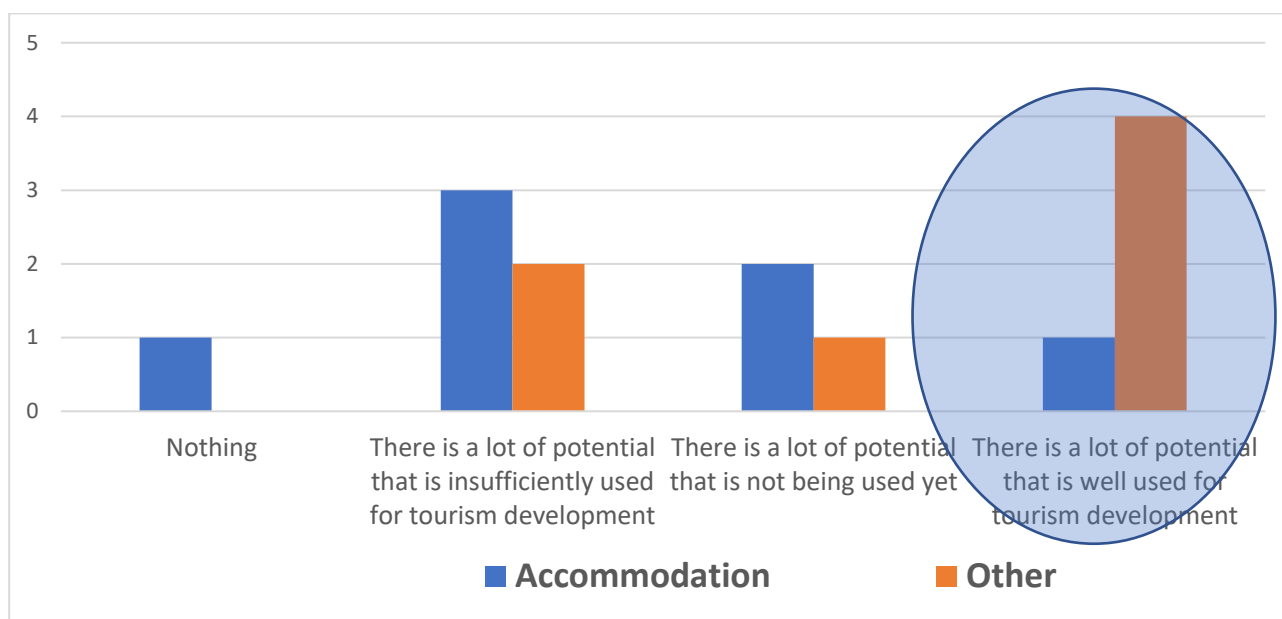
Frankly speaking it is difficult to comment on the attractions of a location, taking as a reference only the information provided by a questionnaire, but what seems to be totally missing in the list above are indications relating to events.

This would be consistent with the observation made by tourists about the lack of entertainment.

#### **4.2.5 Doing tourism business in Murter**

The entrepreneurs most in favour of using Murter's attractive potential are those in the non-hospitality sector. The first data to pay attention to is the presence of a **significant share (5 out of 14) of entrepreneurs satisfied with how the tourist potential of the destination is used.**

**Fig 4.12 Potential of Murter to develop tourist sector.**

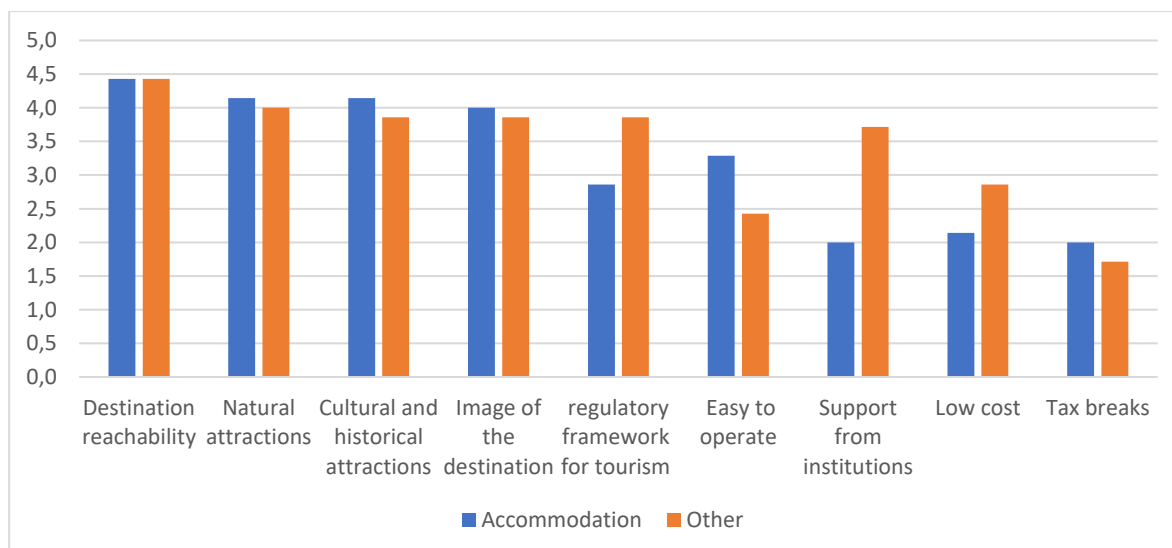


Other more critical entrepreneurs, 5 out of 14, argue that the potential could be better used. While a minority share says that the potential is not used at all.

The points of view of hoteliers and the managers of other tourist services are similar for the resources provided by the nature and the ground while the opinions are pretty different about the «political» factors.



**Fig 4.13 Advantage doing business supported by the resources of the graph**

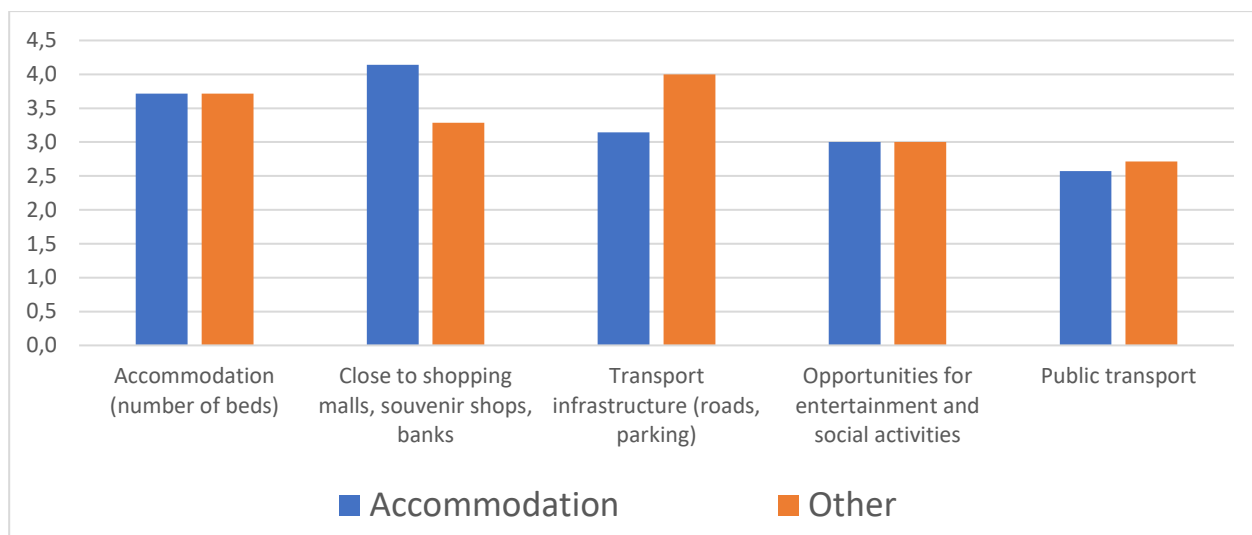


Taking into consideration that 3 is the breakpoint between a positive and negative opinion all the public interventions are considered unanimously as additional problems for tourist companies. Frankly speaking it is **surprising** that the biggest advantage of Murter are not the natural beauties but its reachability.

Taking into consideration that 3 means a rather poor evaluation of the infrastructures and facilities.

Unanimous is the consideration that the stock of public facilities for tourism is rather poor, specifically the public transports and the opportunities for entertainments.

**Fig 4.14 Quality of the tourist infrastructures and facilities.**



It is also worth noting the difference of opinion between hoteliers and other managers as regards transport infrastructures that are poor for the former and good for the latter.

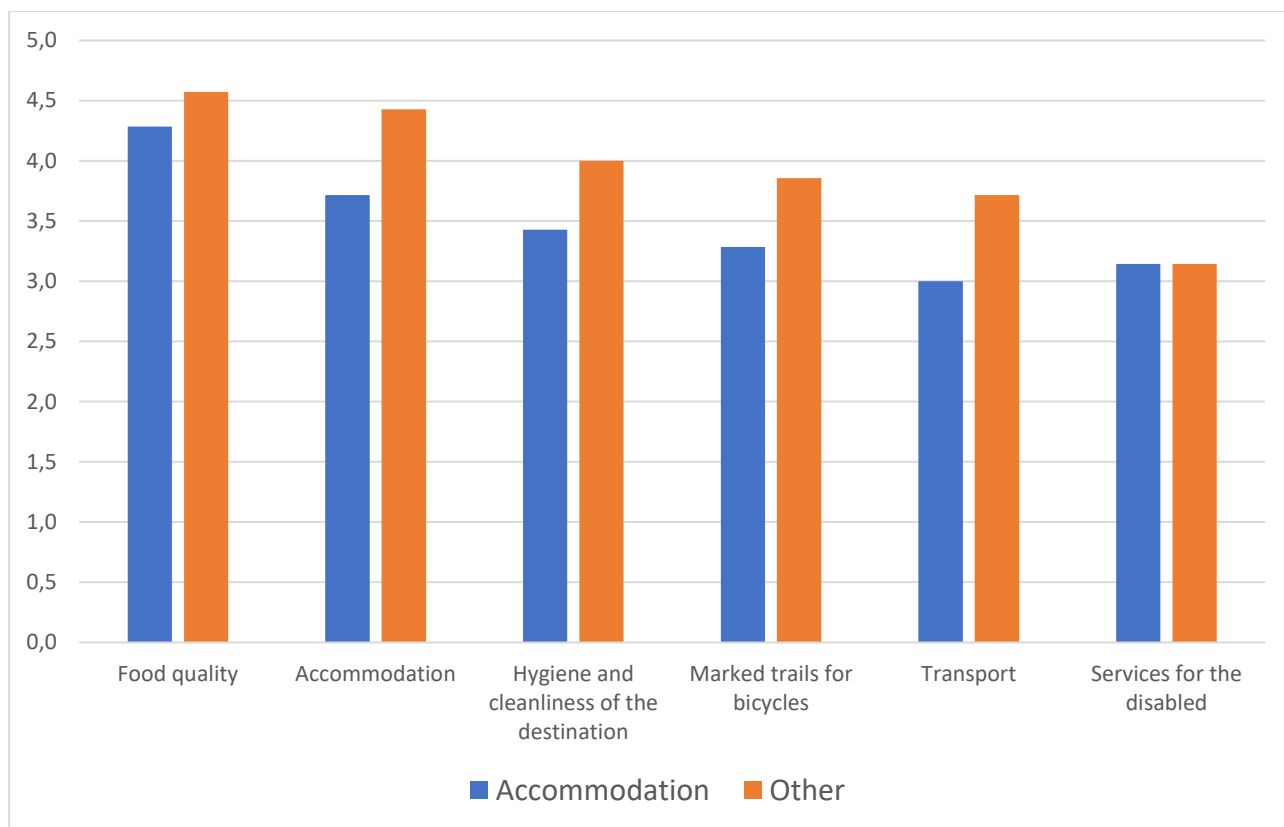
Finally, it should be noted that while tourists complain of a shortage of accommodation and problems relating to their quality, there do not seem to be any problems in this regard for both categories of entrepreneurs

The opinion of the two groups of tourist managers on this further group of services is pretty different. The entrepreneurs of «other» companies are systematically more positive than of the hoteliers.

The quality of food is considered the real strength point of Murter. Also, the hygiene so criticized by tourists is rather good.

It is appropriate to highlight the extremely poor evaluation for disabled services, in this case the two groups are unanimous.

**Fig 4.15 Quality of some additional tourist services**



There are two elements that are unanimous between the two groups of managers interviewed: the courtesy of the residents towards tourists which receives an excellent 4 as a score and a not too satisfactory judgment about the quality of the small shops (3.5).

In the other cases the opinions are pretty far. There are two themes in which this divergence is greatest: the care for the safety of tourists, which is more than good for the "other" entrepreneurs and almost "rather poor" for the hoteliers.

Considering that tourists have a good perception regarding their safety in Murter, in this case the first ones are the closest to the feeling of their guests.

The greatest divergence of opinion between the two groups of interviewees occurs for the item "care of the environment" for hoteliers it is close to 3 while for the "others" it is quite good.

The common opinion for collaboration between local public institutions and private companies is rather poor. This opinion is a little more positive in the case of communication, but all the other spaces for collaboration are unsatisfactory.

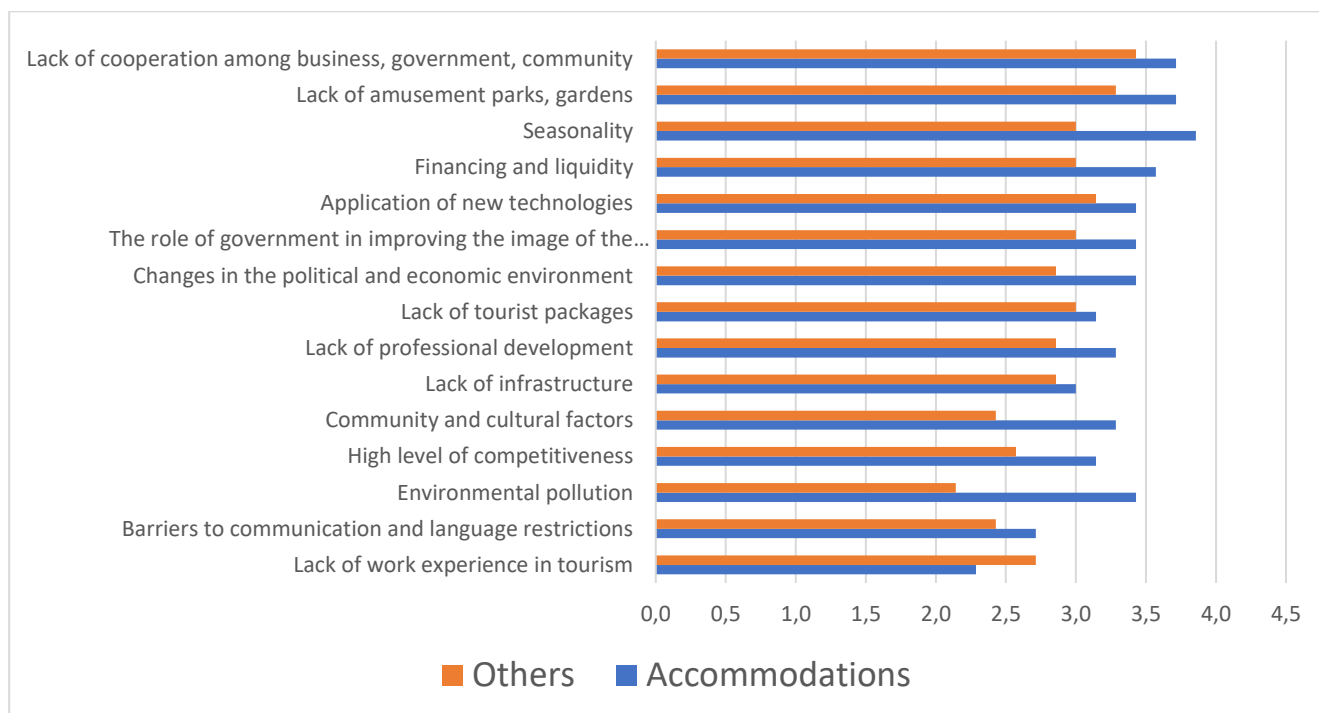
Finally, the care for tourist attractions is also considered rather poor.

#### **4.2.6 The factors hindering or limiting the performance of the Murtar tourist companies**

According to the common opinion of the interviewees, the factors that most negatively affect the potential of Murter's tourism companies are:

- ❖ the lack of collaboration between companies, government, and the population
- ❖ the lack of amusement parks and gardens.

**Fig 4.15 Factors hindering or limiting the performance of the tourist companies of Murtar**



For all other factors, the sensitivity of the two groups is deeply different starting from seasonality, a big problem for hoteliers, not so serious for others.

Same situation for environmental pollution which is perceived as a significant threat by hotel managers but is not a problem for "others"

#### **4.2.7 Expectations about the government**

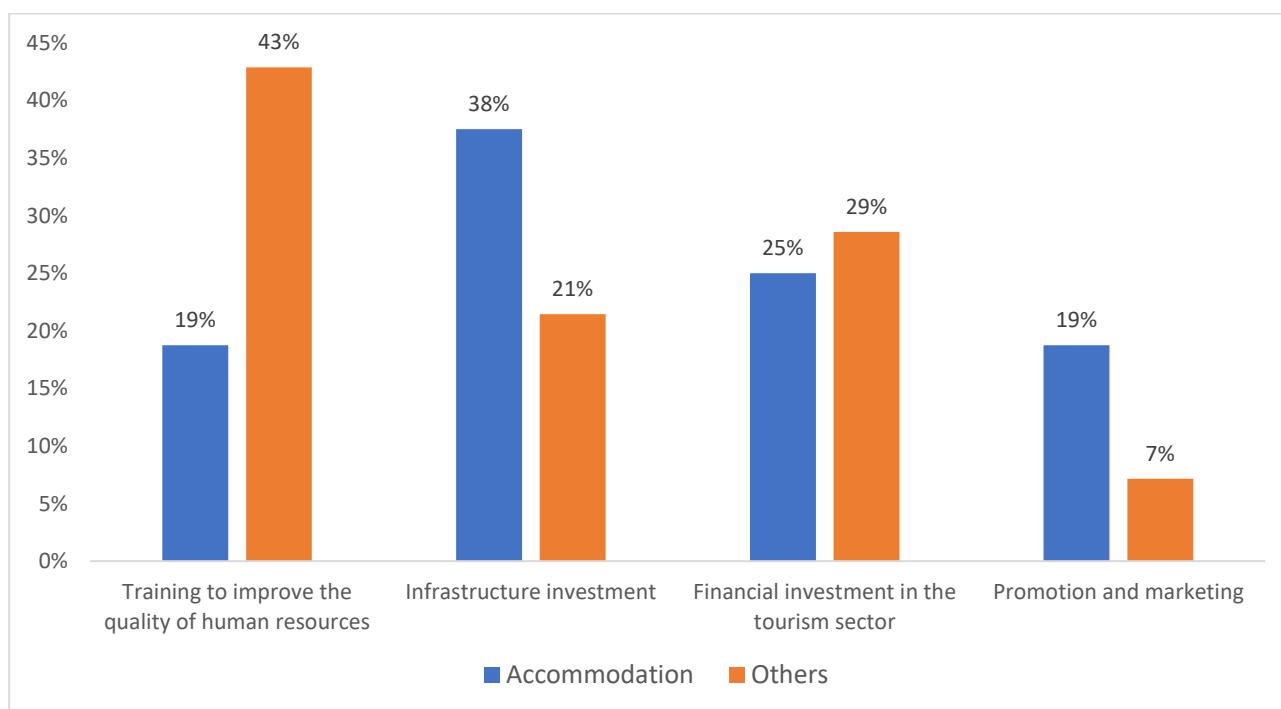
The graph below clearly highlights the priorities that the government, according to the interviewees, should assign to interventions in the tourism sector.

Financial support agrees with both groups.

The other three possible forms of support instead collect different opinions from hoteliers and "non-hoteliers". For example, the difference in opinion regarding training is very large.

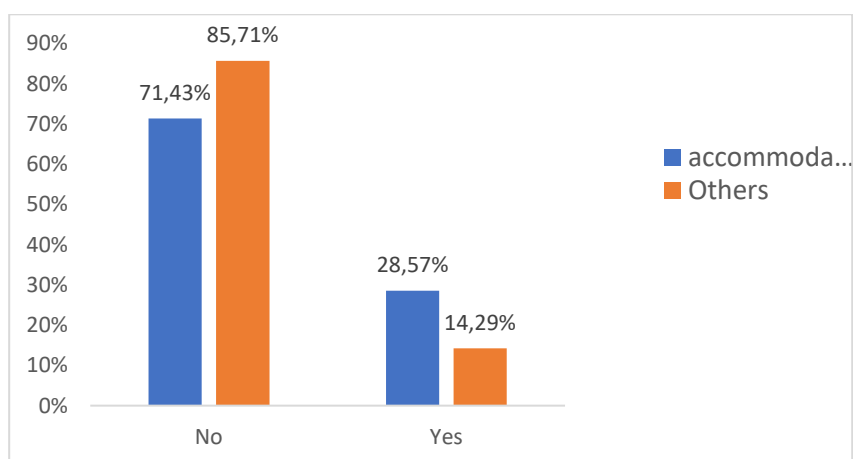
The Murter business community shows significant discrepancies both with the opinions of tourists but also internally.

#### **4.16 What the government must consider encouraging tourist development of a destination**



The high percentage of those who say they do not know the National Strategy for the Development of Sustainable Tourism suggests that the interviewees do not consider knowledge of this document vital for their business.

#### 4.17 Knowledge of National Strategy for Sustainable Tourism Development



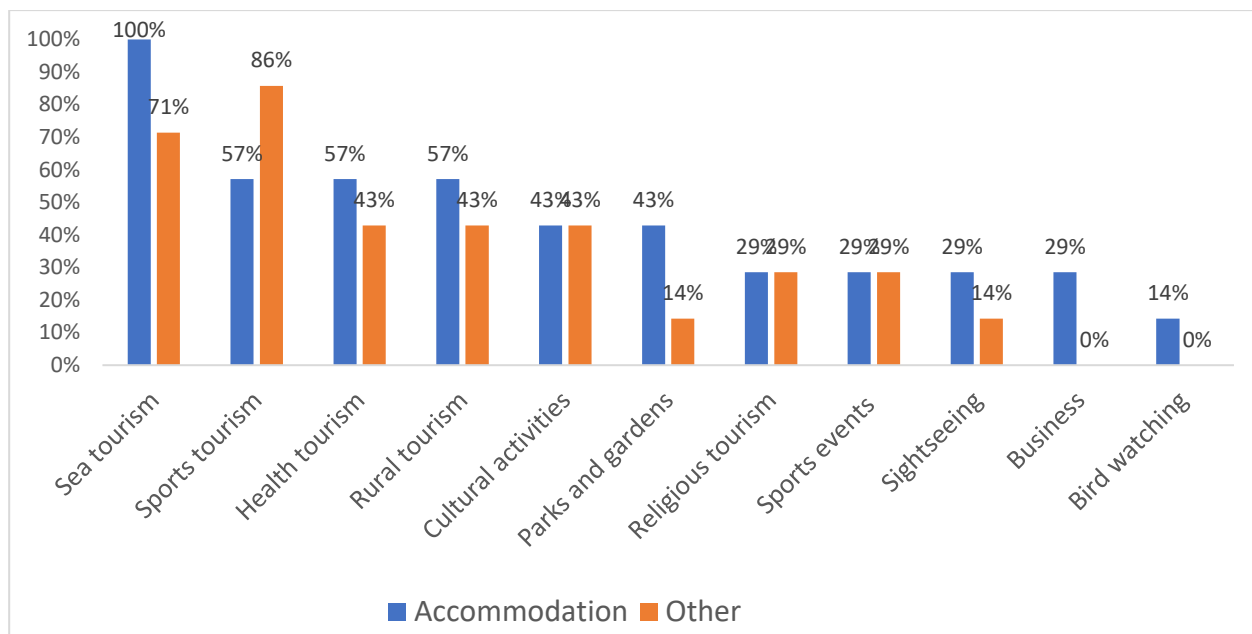
#### 4.2.8 What tourist products in the future of Murtar

The points of view of hoteliers and the 'other' managers about the future of the tourism in Murtar are pretty different:

1. The first ones consider the "**sea tourism**" the main driver of the tourism in the island also in the future, the other products will be complementary and, we can imagine, useful for reducing the seasonality.
2. The second group identify the **sport tourism** as the new driver of tourist activity with "sea tourism" in second position. A kind of Copernican revolution for the future of Murtar. It would be interesting understand from where this point of view come from.

No relevant differences, however, between the points of view of two groups about the other tourist products.

#### 4.18 What tourist products in the future of Murtar



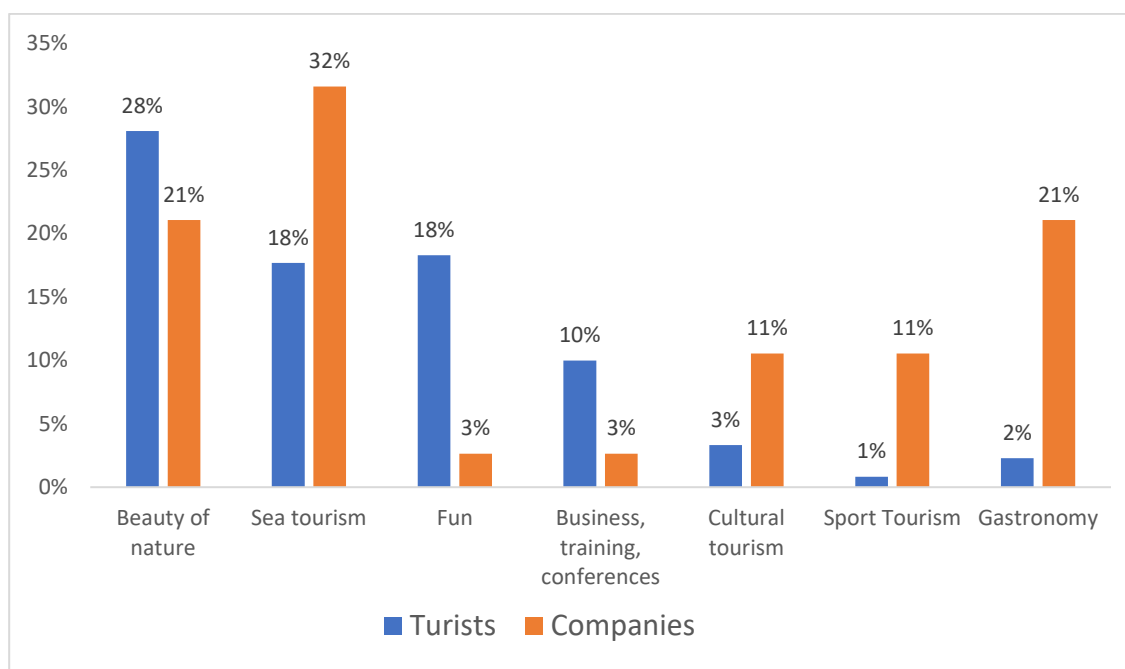
## 5. CONCLUSIONS

If we compare what entrepreneurs think tourists' motivations are with what tourists really think, some problems arise.

The graph below compares the answers given by tourists about the reasons (see pgf 4.1.6) that led them to choose Murter as a holiday destination and what entrepreneurs think are the motivations of tourists.

A series of serious mismatches immediately emerge:

**Fig 4.12 Motivations pushing the tourists to have holidays in Murter and what entrepreneurs think are the motivations of tourists**



- ❖ Tourists choose Murter first of all for the beauty of nature while entrepreneurs think the guests prefer the island for marine tourism, which instead is in second place. This means, for example, that modifying the environment with disfiguring structures could have dramatic effects on demand flows.



- ❖ Gastronomy is not as seductive as entrepreneurs think (21%), while only 2% of tourists think it is.
- ❖ Murter's tourists, even if they seek calm, are still interested in entertainment (18%), an aspect in which, however, operators are very disinterested (3%)

A series of serious *mismatches* immediately emerge:

- ❖ Tourists choose Murter first of all for the beauty of nature while entrepreneurs think the guests prefer the island for marine tourism, which instead is in second place. This means, for example, that modifying the environment with disfiguring structures could have dramatic effects on demand flows.
- ❖ Gastronomy is not as seductive as entrepreneurs think (21%), while only 2% of tourists think it is.
- ❖ Murter's tourists, even if they seek calm, are still interested in entertainment (18%), an aspect in which, however, operators are very disinterested (3%)