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# **The Impact of the 2007 European Cultural Capital in Sibiu: A long term perspective**

Richards, Greg and Rotariu, Ilie

ATLAS (European Association for Tourism and Leisure Studies)

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**A Report to the City of Sibiu / Hermannstadt**

**Greg Richards  
Ilie Rotariu**

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**PO Box 3042  
6802 DA Arnhem  
The Netherlands  
Tel: +31-26-4452699  
Fax: +31-26-4452932  
Email: [admin@atlas-euro.org](mailto:admin@atlas-euro.org)**

Authors

Greg Richards  
Ilie Rotariu

Contact:

[www.tram-research.com/ecoc](http://www.tram-research.com/ecoc)  
Tel: +34-93-217-4826  
Email: [ecoc@tram-research.com](mailto:ecoc@tram-research.com)

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# **The Impact of the 2007 European Cultural Capital in Sibiu: A long term perspective**

## **A Report to the City of Sibiu / Hermannstadt**

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Administrative support for the research was provided by Leontine Onderwater of ATLAS, and various ATLAS members helped with the collection of comparative data in other European cities.

## **Background to the study**

This study of the impact of the European Cultural Capital in Sibiu in 2007 is part of an ongoing programme of research initiated by the European Association for Tourism and Leisure Education (ATLAS) in 1999. This programme of research aims to examine the implementation and effects of this increasingly popular event throughout Europe. To date, ATLAS members have been involved in assessments of the impacts of the ECOCs held in Helsinki (2000), Rotterdam (2001), Porto (2001) and Salamanca (2002).

This study of the ECOC in Sibiu is the first such study to have been completed in an Eastern European country, and therefore provides an interesting contrast to the previous research. This study also benefits from the long association of the Lucian Blaga University in Sibiu with the ATLAS network. The university has been collecting data on cultural consumption in the city for number years as part of the ATLAS Cultural Tourism Project. This will eventually enable us to monitor longer terms in cultural consumption in Sibiu and therefore to provide a longitudinal assessment of the event.

# **The Impact of the 2007 European Cultural Capital in Sibiu: A long term perspective**

## **A Report to the City of Sibiu / Hermannstadt**

The European Capital of Culture staged in Sibiu during 2007 was a unique event. It was the first European Capital of Culture (ECOC) to be staged in one of the post-2004 EU accession countries, and it represented a major challenge in being staged just as Romania was joining the EU.

The main aims of the event were

- Raising the international profile of Sibiu
- Long term cultural development
- Attracting international visitors
- Enhancing feelings of pride and self-confidence
- Growing and expanding the local audience for culture
- Improving social cohesion and creating an economic downstream
- Improving cultural and non cultural infrastructure
- Developing relationships with other European cities/regions and promoting European cultural cooperation
- Promoting creativity and innovation

In addition there were a number of specific aims in the area of communications and promotion:

- Raising the international profile of the city
- Changing the image of the city
- Increasing foreign and domestic tourism
- Broadening audiences for culture
- Improving the availability and dissemination of information about the programme is a major task, now under the process of construction.

The original evaluation report published in 2007 by ATLAS (Richards and Rotariu, 2007), indicated that the event programme had successfully met many of the short-term aims, attracting large numbers of visitors, increasing cultural participation and improving the image of the city in Romania and abroad. Measuring the other, often less tangible impacts of the event requires a longer-term monitoring strategy. ATLAS has therefore undertaken a continuous monitoring programme for the City of Sibiu over the past three years. This research includes a number of different elements:

- Regular surveys of residents and visitors
- Analysis of tourism flows and other statistics
- Interviews with stakeholders in the city
- Data from the regular surveys carried out by ATLAS in other parts of Europe.

This report provides a summary of some of the major findings of the research to date, mainly based on the resident and visitor surveys.

## Methodology

A framework for monitoring the impacts of the 2007 ECOC in Sibiu was established in January 2007, as part of the ATLAS Winter University, which formed part of the ECOC programme. Pilot surveys were carried out with residents and visitors in order to design the final research instrument. This was largely based on questionnaires already utilized for other ECOCs, including Rotterdam (2001), Salamanca (2002) and Luxemburg (2007).

The surveys were also designed to provide comparisons with earlier surveys conducted in Sibiu by the "Lucian Blaga" University in the framework of the ATLAS Cultural Tourism Research Project. These surveys provide a useful benchmark for the period before the ECOC, with data collection having started in 2001. The survey questionnaire can be found in Appendix 1.

In total, over 4100 surveys of residents and visitors have been completed over the period 2001-2009.

### *Sibiu Surveys 2001 – 2009*

	2001	2004	2005	2007	2008	2009
	Theatre Festival Jazz Festival	ASTRA		ECOC		
May				279	88	579
August/September				413	193	500
October				426	230	337
December						122
Total	346	236	357	1118	511	1538

The surveys were conducted in sites around the city, with sampling over different days and times to try and achieve a representative sample of visitors.

### *Visitor interview main locations 2009*

Location	Number of interviews	%
Piata Mare	528	35,8
Piata Huet	170	11,5
Turnul Sfatului	104	7,1
Cazarma 90	90	6,1
Parcul Subarini	88	6,0
Teatrul Gong	75	5,1
Parcul Tineretului	62	4,2
Mall	59	4,0
Curmatura Pension	44	3,0
Facultatea Stiinte Economice	28	1,9
Muzeul Bruckenthal	26	1,8
Muzeul Astra	26	1,8

Potter Fear Piata Mare	21	1,4
Terezian	18	1,2
Nicolae Balcescu	7	,5
Muzeul Satului	7	,5
Parc Hotel	7	,5
Teatrul Radu Stanca	5	,3
Piata Mica	5	,3
Club Liquid	3	,2

Foreign visitors were slightly more likely than other respondents to be encountered in the main square.

#### *Foreign visitor interviews 2009*

Location	Number	%
Piata Mare	105	41,2
Piata Huet	24	9,4
Teatrul Gong	21	8,2
Turnul Sfatului	18	7,1
Parcul Tineretului	11	4,3
Cazarma 90	10	3,9
Parcul Subaini	10	3,9
Mall	8	3,1
Nicolae Balcescu	6	2,4
Curmatura Pension	6	2,4
Muzeul Bruckenthal	5	2,0
Terezian	5	2,0
Facultatea Stiinte Economice	4	1,6
Potter Fear Piata Mare	3	1,2
Teatrul Radu Stanca	2	,8
Muzeul Astra	2	,8
Piata Mica	1	,4
Parc Hotel	1	,4

The most important findings of the research to date, largely based on the resident and visitor surveys, are presented below.



## Profile of visitors to Sibiu

The ECOC aimed to develop a 'new tourism concept' in 2007, with the following aims:

- promoting high-quality, ecologically sound, tourist experiences in Sibiu and the surrounding region.
- providing satisfaction. Tourists must enjoy their stay here; they must be so satisfied with their experience that they will be willing to tell others about the city. We intend to integrate our tourism industry into an all-embracing concept, and connect it to a regional services network which operates at high standards.
- intensifying our tourism marketing. In this regard, the activities will include:
  - the promotion of our historical city centre
  - easy access to the sights and monuments in the region
  - the promotion and reintegration of the tourism market of our mountain resort at Paltinis (situated in the close proximity to the city)
  - planning and organising local, regional, inter-regional, national and international events
  - developing a gastronomic and hotel industry of high quality, enhanced by an attractive calendar of cultural and artistic events
  - developing new forms of tourism: religious, scientific and cultural, which can make better use of the local and regional conditions.

The results of visitor research indicate that this new tourism concept was largely successful, both in terms of the visitor profile (as demonstrated in this section of the report) and in terms of high levels of satisfaction (see below).

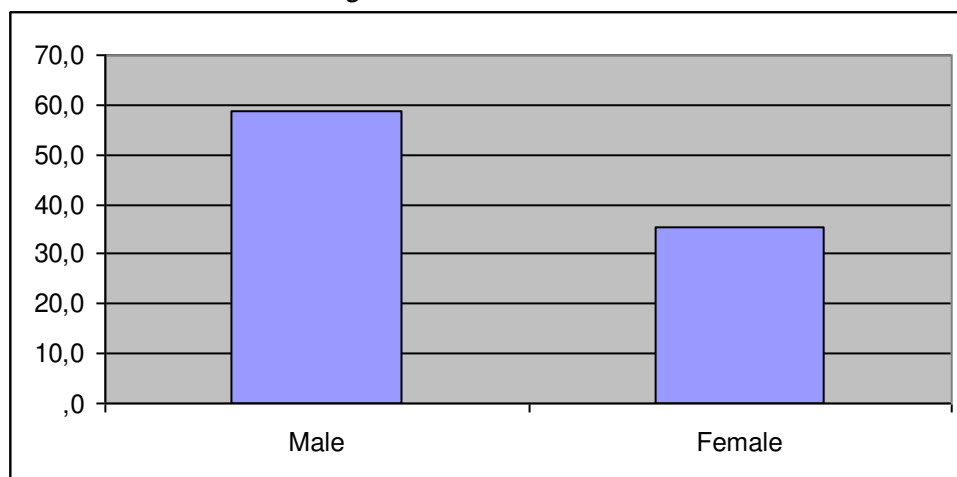
The early results of the Sibiu surveys indicated a predominance of women attending cultural events in the city, which coincides with the pattern found elsewhere in Europe. Over time, however, the proportion of men has increased.

### *Gender distribution of visitors 2009*

%	2001	2004	2005	2007	2008	2009
Male	41,6	39,1	46,7	49,3	60,5	51,6
Female	58,4	60,1	53,3	50,7	39,5	48,4

Foreign visitors were more likely than domestic tourists to be male, with almost 60% being men in 2009.

### *Gender distribution of foreign visitors 2009*



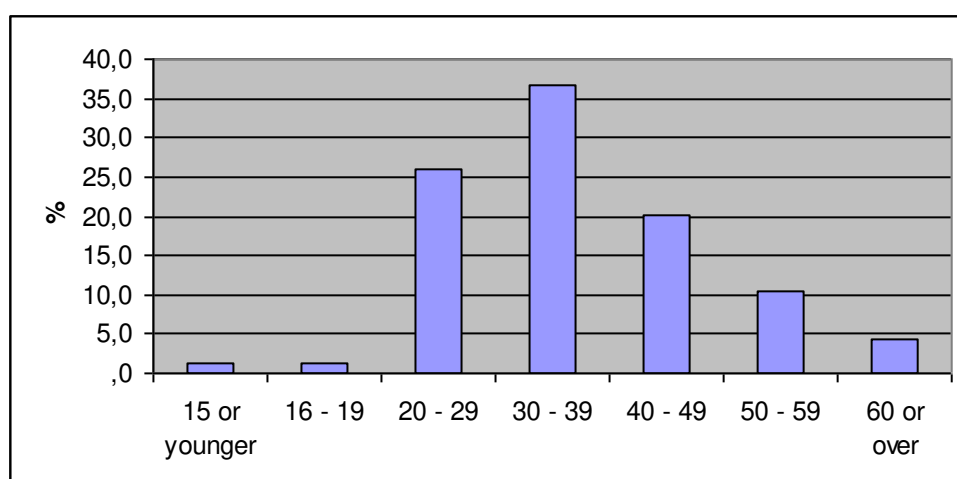
The age distribution of participants in cultural events in Sibiu also reflects general European patterns. The largest single age group is consistently 20-29, although visitors over the age of 40 have consistently gained ground over the years. This may be an indication that Sibiu has developed a more varied cultural offer which is able to cater for all age groups.

#### *Age distribution of visitors*

%	2001	2004	2005	2007	2008	2009
15 or younger	2,6		0	1	2	1
16 - 19	17,4	9,8	8	8	8	5
20 - 29	52,0	76,6	45	50	35	38
30 - 39	13,1	8,1	28	24	25	28
40 - 49	9,9	1,7	13	10	17	16
50 - 59	3,2	2,6	5	4	9	7
60 or over	1,7	1,3	1	3	4	5

In general, foreign visitors tended to be younger than domestic tourists, with 35% being in the 30-39 year age group.

#### *Age distribution of foreign visitors, 2009*



The education level of participants in cultural events is consistently high, with almost three quarters of respondents having some form of higher education qualification in 2009. This is far higher than the level of higher education participation in Romania as a whole, and indicates that cultural events are attracting highly educated people to the city.

#### *Highest education level (%)*

	2001	2004	2005	2007	2008	2009
Primary school	4,1	0,4	0	0	10	2
Secondary school	12,1	8,1	3	4	8	8
Vocational education	41,4	26,5	20	11	20	16
Bachelor degree	29,6	55,1	66	16	40	58
Master or Doctoral degree	12,7	9,8	10	68	22	15

The education level of foreign visitors was even higher than that of Romanian visitors.

*Education level of foreign visitors, 2009*

	%
Primary school	0,8
Secondary school	7,1
Vocational education	11,1
Bachelor degree	61,3
Master or Doctoral degree	19,8

This pattern is also reflected in the occupational profile of the respondents, most of whom have a managerial or professional occupation.

*Occupational profile (%)*

	2001	2004	2005	2007	2008	2009
Director or Manager	9,4	18,8	16	16	12	13
Professional (doctor, lawyer, teacher, etc)	36,7	36,3	25	33	26	25
Technical profession (technicians, nursing)	14,3	12,5	20	28	17	20
Clerical/ Administration	8,7	18,8	23	9	20	18
Service and sales personnel	24,1	6,3	12	11	16	20
Manual and crafts worker	6,6	7,5	4	3	9	6

Foreign visitors were even more likely to have managerial or professional backgrounds than Romanian visitors.

*Occupational profile of foreign visitors, 2009*

	%
Director or Manager	19,9
Professional (doctor, lawyer, teacher, etc)	27,7
Technical profession (technicians, nursing)	15,4
Clerical/ Administration	9,4
Service and sales personnel	12,0
Manual and crafts worker	4,5

Many of those attracted to cultural events in Sibiu also have an occupation related to culture. This may be an indication that the successful events policy of the city has been able to raise the profile of Sibiu as a cultural centre, which in turn will tend to attract those in the cultural and creative occupations. This is a phenomenon noted by Richard Florida, who argues that the 'creative class' is attracted by places which offer a creative atmosphere and give people the chance to meet other creatives.

The proportion of visitors with a cultural occupation has varied over the years. The high proportion of cultural occupations in 2001 and 2004 was probably due to the data being collected at specialist events, such as the ASTRA Film Festival. The ECOC seems to have broadened the cultural audience, with a higher proportion of visitors outside the cultural sector. Since the ECOC the visitor profile has again included a higher proportion of visits with a link to culture.

*Do you have a cultural occupation? (%)*

	2001	2004	2005	2007	2008	2009
Yes	42,0	58,5	25,9	23,9	41,7	33,5

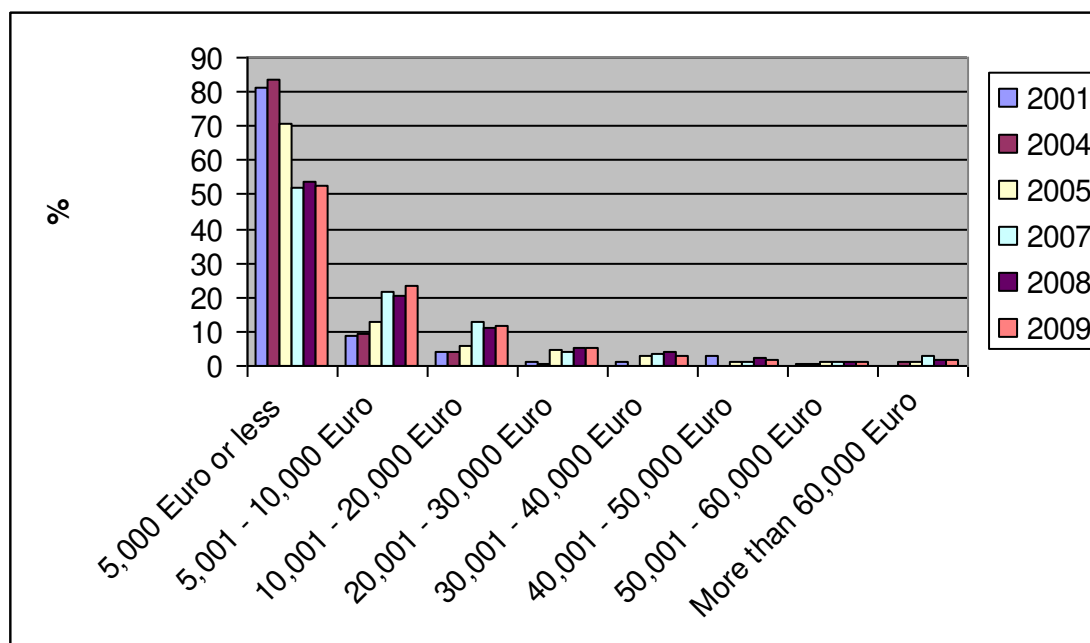
When we look at the cultural occupations by visitor origin, we can see that in 2007 the ECOC attracted a high proportion of cultural sector visitors from abroad, underlining the international cultural appeal of the event. By 2009, however, the level of cultural occupations among local residents and other Romanian visitors had increased significantly, perhaps indicating a shift towards a more developed cultural economy in the country.

*Cultural occupation by visitor origin*

	2007 %	2009 %
Sibiu	18	33
Elsewhere in Transylvania	24	34
Elsewhere in Romania	24	38
Abroad	38	31
Total	24	34

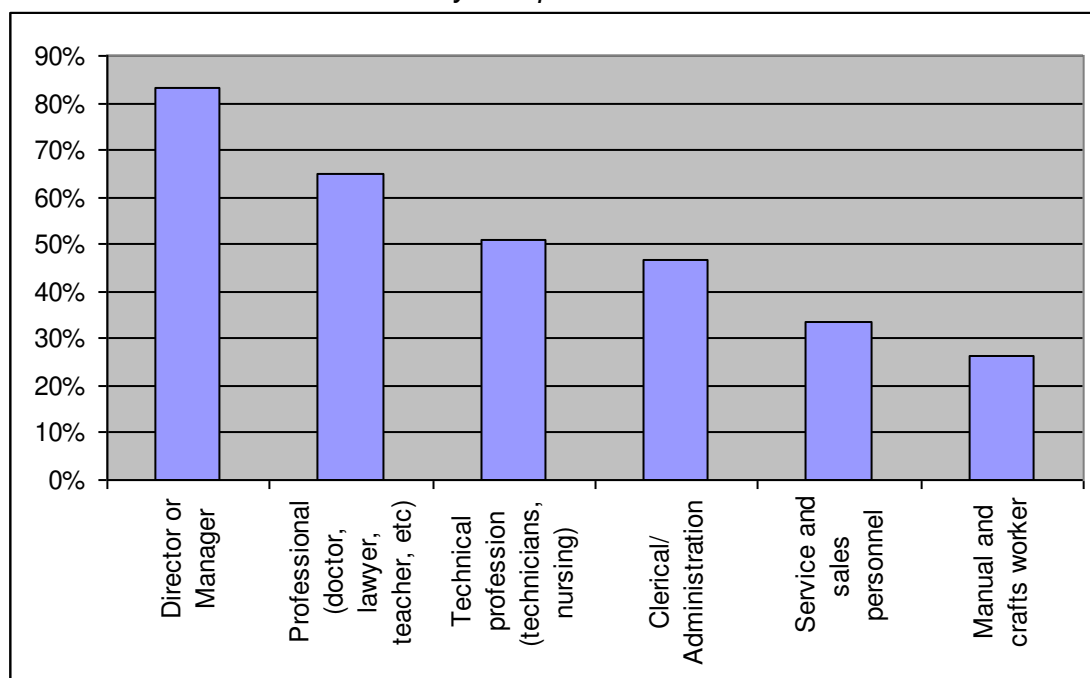
In line with the high education levels and occupation profiles of participants, their incomes also tend to be relatively high. It is also notable that since 2001 there has been a steady increase in the income levels of participants, reflecting the growth of the Romanian economy. This shift towards higher incomes was particularly marked in 2007, when the ECOC also attracted large numbers of foreign visitors.

### Average household income levels 2001-2009



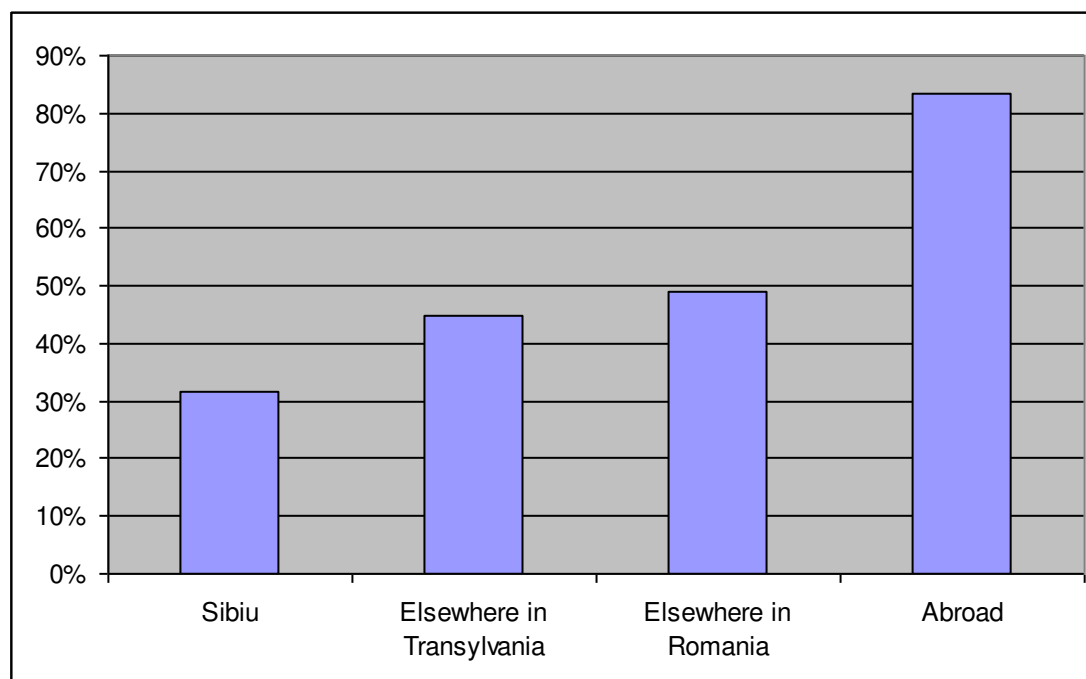
Occupational profile has a strong influence on household income. Over 80% of those in managerial positions had an income of over €5000, compared with less than 30% of manual and crafts workers.

### Visitors with incomes over €5000 by occupation



Incomes were strongly related to visitor origin. Just over 30% of Sibiu residents had an income of over €5000, compared with around half of those from other parts of Romania. Foreign tourists not surprisingly had significantly higher incomes than Romanian visitors. This underlines the potential economic impacts of tourism development, which can help attract wealthier consumers to the city.

### *Household incomes over €5000 by visitor origin*



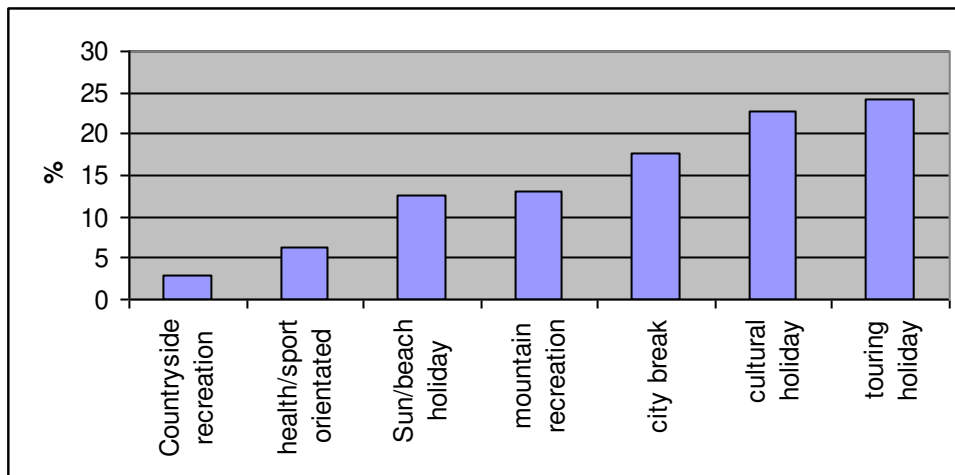
Perhaps not surprisingly, the type of holiday most frequently taken by respondents is sun and beach holidays. In 2009 the proportion of respondents who usually take cultural holidays was markedly lower than in previous surveys.

### *Usual holiday type (%)*

	2007	2008	2009
Health/sports	2.9	13.9	5.1
Rural holiday	6.8	6.1	7.1
Touring holiday	15	18.2	13.7
Cultural holiday	16.5	19	11.1
City trip	16.9	9.9	15.2
Mountain recreation	21.3	13.5	18.1
Countryside recreation		6.1	7.9
Sun/ beach holiday	23.5	21.6	28.8

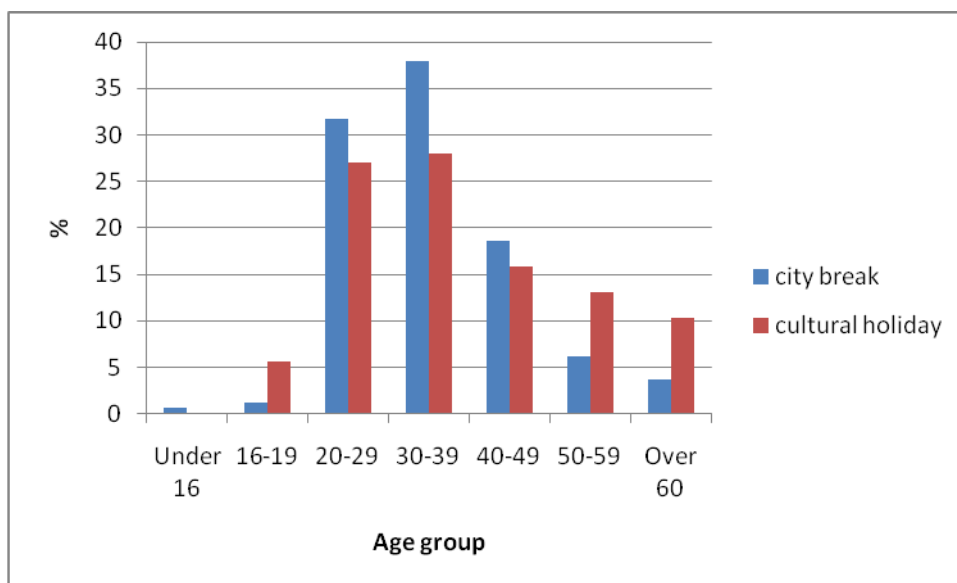
For foreign visitors, cultural holidays and touring holidays were particularly important.

### *Holiday type for foreign visitors, 2009*



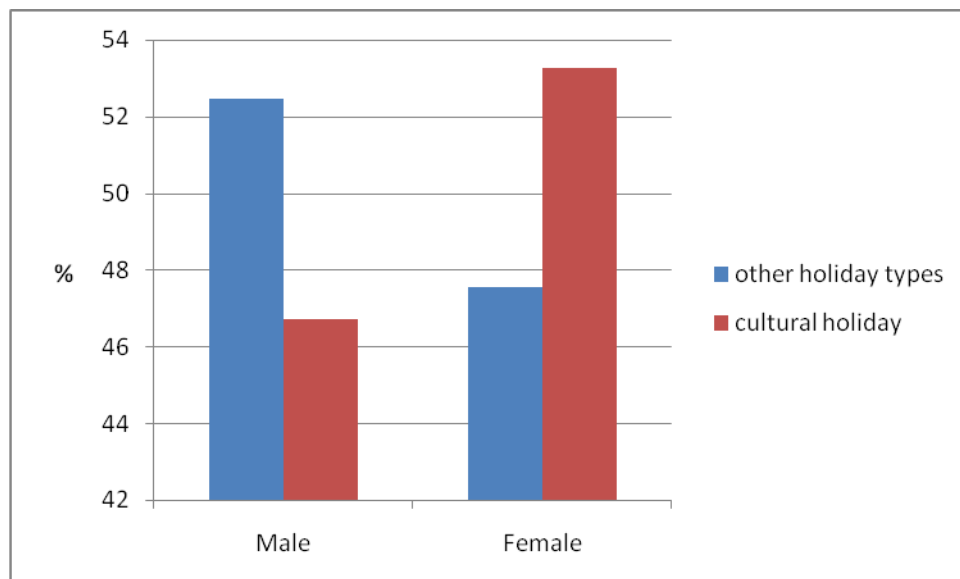
In general, those taking cultural holidays are older than those on city breaks. This fits the image of the classic cultural tourist, and indicates that a 'city break' is perhaps a more fashionable product for younger people (particularly young couples).

### *Age distribution of visitors by usual holiday type 2009 (%)*



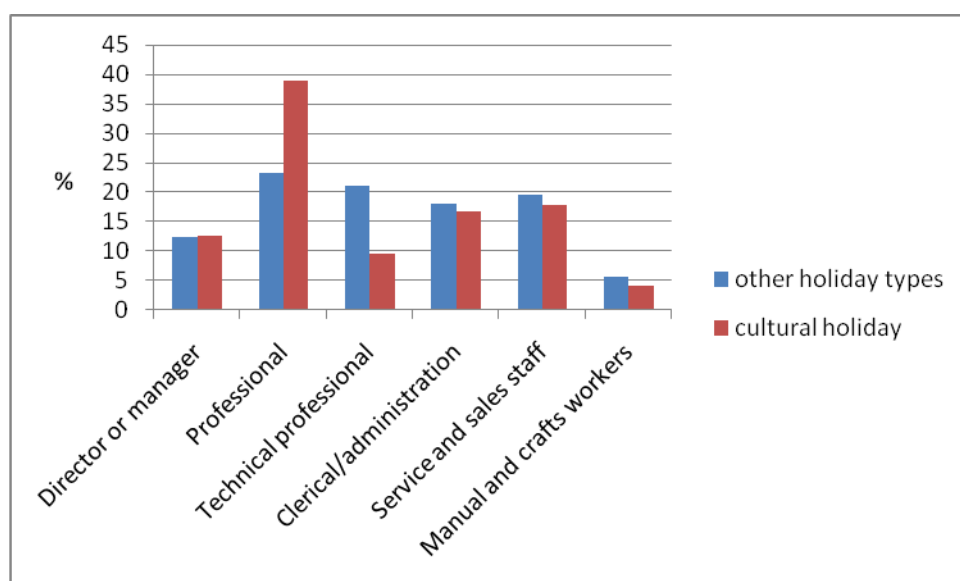
Those usually taking cultural holidays tended more often to be female than other visitors. Again, this reflects the patterns usually found in other research on cultural tourism.

### Gender by cultural holiday 2009



Those taking cultural holidays were also more likely to have professional occupations than other visitors.

### Occupational profile of visitors by cultural holiday 2009



In terms of area of residence, the largest single group of visitors is drawn from Sibiu itself, which accounted for almost half the respondents in 2009. Over the monitoring period, significant changes have taken place in the origin of visitors to cultural events. In general, the proportion of local participants has fallen while the number of visitors from elsewhere in Romania and abroad has increased. The growth in foreign visitors was most noticeable in the years up to 2007, when the ECOC recorded a record level of foreign visits, and has declined since then. This is at least partly in line with national trends, which have seen international tourism fall dramatically as a result of the economic crisis. However, the increasing importance of domestic cultural tourism is also a trend seen in other countries, for example as measured in the ATLAS surveys in Portugal.



### *Visitor origin 2001-2009*

	2001	2004	2005	2007	2008	2009
Sibiu	54,3	38,8	52,7	38	37	49
Elsewhere in Transylvania			10	12	23	23
Elsewhere in Romania	34,7	37,3	34,2	34	22	23
Abroad	11,0	22,9	13,2	16	18	5

Among the foreign tourists interviewed, the most important source countries were Germany, Italy and France, which together accounted for over half the foreign visitors recorded. It is clear that the bulk of the foreign visitors in Sibiu are drawn from the EU. In general, the most important source markets are all in Western Europe.

### *Top origin countries for visitors to Sibiu, 2009*

	<b>Number</b>	<b>% of total foreign visitors</b>
Germany	111	36,4
Italy	33	10,8
France	25	8,2
Spain	21	6,9
Iceland	14	4,6
United Kingdom	14	4,6
Austria	8	2,6
United States	7	2,3
Belgium	4	1,3
Bulgaria	4	1,3
Canada	4	1,3
Greece	4	1,3
Azerbaijan	3	1,0
China	3	1,0
Jordan	3	1,0
Netherlands	3	1,0
Poland	3	1,0
Sweden	3	1,0

This picture in general reflects the pattern of visits to the ECOC in 2007 as well, except that the Netherlands was a much more important source market for the ECOC event (which may be related to specific events surveyed during the ECOC itself).

### *Origin countries of foreign visitors during the ECOC in 2007*

<b>Origin country</b>	<b>%</b>
Germany	23
Netherlands	22
France	13
Italy	8
Spain	6
United Kingdom	4
Luxembourg	3
Austria	3
United States of America	2
Israel	2
Greece	2
Czech Republic	2
Belgium	2
Portugal	1
Poland	1
Norway	1
Jordan	1
Hungary	1
Croatia	1
Bulgaria	1

### **Previous visits to Sibiu**

The proportion of visitors who have previously visited the city shows that it has steadily become an established destination within Romania. In 2001 less than half the visitors had been to the city before (even though most of the visitors came from Romania), whereas by 2009 about 80% had been to the city before. This shows that Sibiu has succeeded in generating a higher level of repeat visitation over the years, which is also related to improvements in the quality of the tourism product (see below).

#### *Have you made a previous visit to Sibiu?*

	2001	2004	2005	2007	2008	2009
Yes	49,6	54,9	67,9	63,5	68,1	80,0
No	50,4	45,1	32,1	36,5	31,9	20,0

Much of the repeat visitation since 2007 has been related to the EC OC. The proportion of visitors who had been to the city in 2007 grew from 50% in 2008 to almost three quarters in 2009. It is highly probable that people who visited the city in 2007 were slightly less likely to come back the following year, but they have now decided to repeat their positive experience from the ECOC year, particularly as Romanians are now making more domestic trips as a result of the economic crisis.

#### *Did you visit Sibiu in 2007?*

%	2008	2009
yes	50	74
no	50	26

There is also a strong relationship between those who visited the city in 2007 and those who participated in at least one ECOC event in that year. Again, it seems that the active ECOC

participants have come back to Sibiu in relatively large numbers in 2009, adding considerably to the long-term impact of the event.

*Did you visit ECOC events in 2007?*

%	2008	2009
yes	19,8	61,9
no	80,2	38,1

The proportion of first time visitors varies considerably according to the reason for travel. In particular, cultural events and attractions generate a relatively high level of first time visitation, whereas shopping or visiting friends and relatives are much more likely to be motivations for repeat visitors.

*First time and repeat visitors by visit motivation 2009 (%)*

Motive	Repeat visitors	First time visitors
To come to this attraction/event	61	39
Cultural visit	75	25
Holiday	79	21
Day trip	90	10
Business	91	9
Visiting friends/family	94	6
Shopping	100	0

Interestingly, there is also a relatively high level of repeat visitation for foreign as well as domestic visitors. Although foreign visitors were less likely to have visited the city before than domestic tourists, the level of repeat visitation in 2009 was almost 70%, which is very high. Most of the foreign repeat visitors had been to the city in 2007, which underlines the importance of the ECOC in attracting visitors to the city. In contrast, during the ECOC year itself the proportion of foreigners making a repeat visit to Sibiu was just over a quarter, showing that the ECOC has boosted repeat visitation.

*Previous visits to Sibiu by visitor origin 2009*

Visitor origin		Previous visit?			Total
		Yes, many times	Yes, once or twice	No	
	Elsewhere in Transylvania	82,6%	7,4%	10,0%	100,0%
	Elsewhere in Romania	59,5%	23,8%	16,7%	100,0%
	Abroad	43,1%	25,5%	31,4%	100,0%
Total		67,5%	17,2%	15,3%	100,0%

## Visit Characteristics

The reasons given by visitors for coming to Sibiu have shifted over the years. Because the 2004 data were collected at the ASTRA Festival, there was a very high level of visitors who were only coming to Sibiu for that particular event. This was also the case for a lot of visitors to the ECOC in 2007. Since 2007 the proportion of cultural visitors has been maintained, but the effect of the economic downturn is probably reflected in the higher number of visitors travelling to stay with friends and relatives in 2009.

### *Purpose of visit 2004-2009*

	2004	2007	2008	2009
Shopping		1	2	3
Business	9	6	23	14
to come to this attraction/event		9	22	12
Day trip		9	4	10
visiting friends/family	6	16	11	27
Cultural visit	80	17	19	20
Holiday	5	19	16	14
Cultural Capital		33		

For foreign visitors in 2009, the most important motivation was cultural visit, followed by visiting friends and relatives. Foreign visitors are also more likely to be on a holiday trip than domestic visitors.

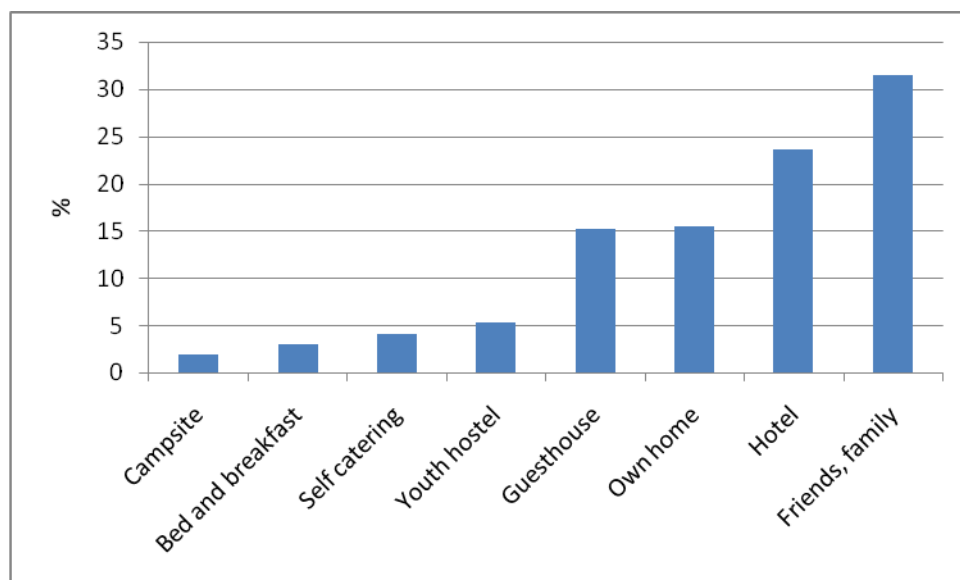
### *Visit motivation for foreign visitors, 2009*

	%
Shopping	1.5
Business	12.4
to come to this attraction/event	11.2
Day trip	3.7
visiting friends/family	22.1
Cultural visit	31.5
Holiday	19.1

## Accommodation

Almost a third of overnight visitors stayed with friends and relatives, and almost a quarter stayed in hotels. Not surprisingly, foreign visitors are most likely to stay in hotels.

*Accommodation use (all visitors, 2009)*



Over time, the proportion of visitors staying in hotels has remained fairly constant, although increased tourist numbers will mean that there were more hotel guests in 2009 than in 2005. The proportion of visitors staying with friends and relatives or in their own home increased substantially in 2009, perhaps as a result of economic pressures from the crisis. However, the diversification of commercial accommodation in recent years is also clear.

*Accommodation used*

	2001	2005	2007	2008	2009
Campsite	5	5	1	4	2
Youth hostel	2	2	5	14	7
Own home	7	6	8	10	14
Guest house		0	10	7	14
Self catering	14	4	11	10	6
Bed and breakfast	13	2	15	7	5
Hotel	24	28	23	23	21
Friends, family	35	53	26	15	31
		100	100	100	100

### *Hotel accommodation by visit motivation 2009*

Visit motivation	% hotel guests
business	43
cultural visit	35
event	31
holiday	27
day trip	16
shopping	5
visiting friends and relatives	3

There is little difference between visitors from the region and from the rest of Romania as far as length of stay is concerned, but foreign guests tend to stay a slightly shorter time.

### *Nights away from home*

Mean	2001	2004	2005	2007	2008	2009
Visitor origin						
Sibiu Region				6,1	12,1	10,5
Elsewhere in Romania			6,4	4,1	8,9	10,4
Abroad			10,0	6,7	9,9	7,9
Total	6,6	5,4	7,4	5,5	11,5	9,8

An important aspect of the economic impact of tourism is the proportion of visitors who actually stay in the city or local region. Tourists using accommodation locally spend money directly in the local economy, whereas visitors staying elsewhere have a much lower impact. In the case of Sibiu the proportion of visitors staying in the city itself is very high, and has increased since 2007. This again indicates that the economic impact of tourism has grown since the ECOC.

### *Location of accommodation used by visitors to Sibiu*

%	2007	2008	2009
Staying in Sibiu	69	76	72
Staying in Sibiu region	18	21	19
Staying in Transylvania	6	2	4
Staying elsewhere	5	1	3
Staying abroad	2	0	1
	100	100	100

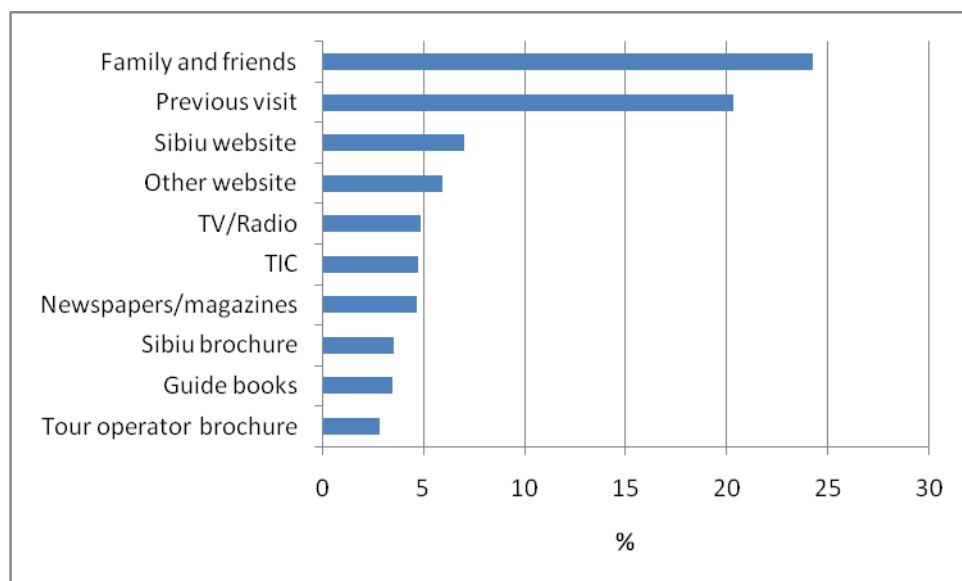
For those visitors actually staying in Sibiu, the average length of total journey including Sibiu is slightly more than 9 nights.

## Information sources

The main information sources for visitors in 2009 were family and friends and previous visits made to the city. This reflects the high proportion of repeat visitors in 2009, most of whom will have gathered information on Sibiu from earlier visits.

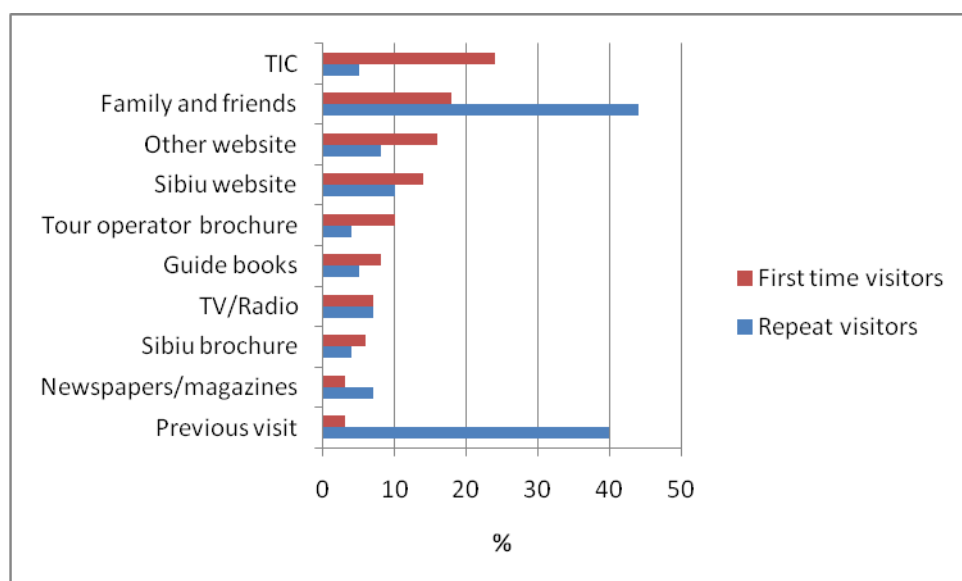
Apart from personal contacts and experience, the most important information sources were websites. The Sibiu website was the most frequently used source of Internet information consulted by the visitors.

### *Information sources consulted by visitors 2009*



Information sources varied considerably for first time and repeat visitors. First time visitors were far more likely to use the Tourist Information Centre, websites, brochures and other external information sources than repeat visitors, who rely extensively on their own experience and their family and friends.

### *Information sources used by first time and repeat visitors, 2009*



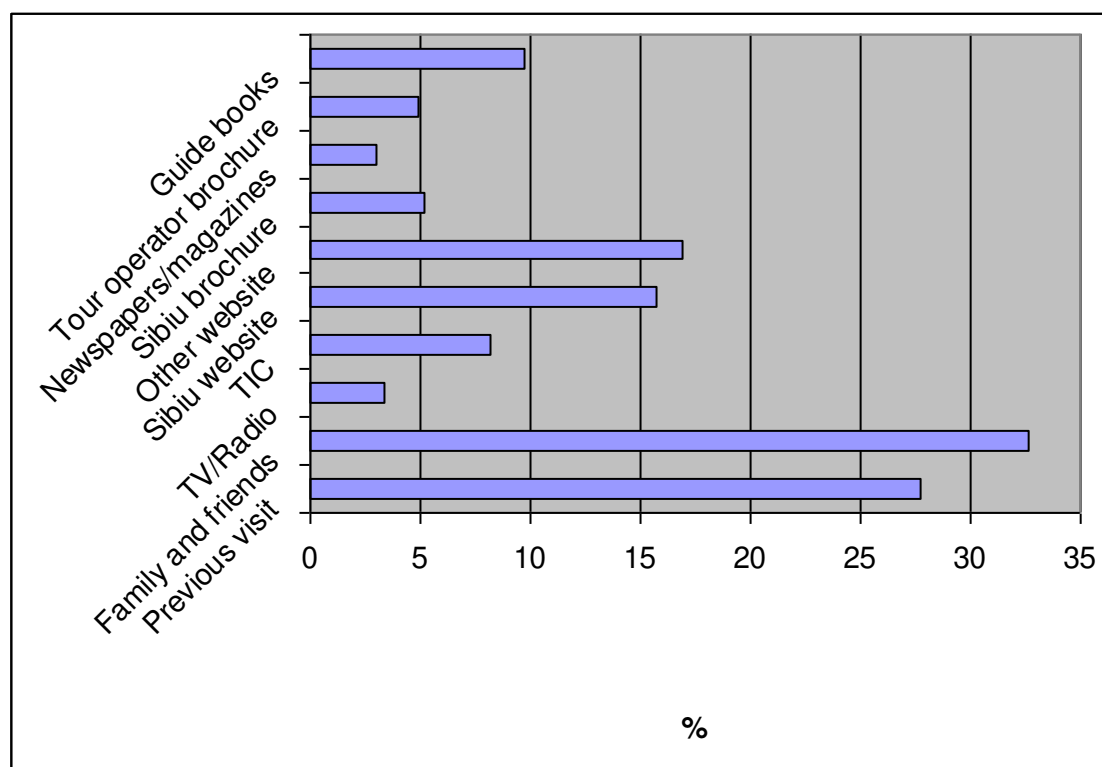
There has been a clear shift in the use of different information sources since the ECOC in 2007. During 2007 extensive use was made of the Sibiu 2007 website and the specific promotional material produced for the ECOC, such as the programme brochure. In subsequent years it is clear from the data that Sibiu does not have the media profile it achieved during the ECOC year, with falling numbers of people gathering information on the city via the media and from the Sibiu website. In contrast previous visits have become more important as an information source, underlining the important role of the ECOC in stimulating repeat visitation.

#### *Information sources used by visitors 2007-2009*

	2007	2008	2009
Previous visit	16,9	24	19
Family and friends	20,4	24	23
TV/Radio	12,5	4,6	4,3
TIC	15,5	5,5	3,8
Sibiu 2007 info point	5,6		
Sibiu website	30,3	23,2	7,7
Other website	21,3		
Sibiu brochure	4,8	5,9	2,7
Newspapers/magazines	9,1	2,6	3,7
Tour operator brochure	3,5	4,2	2,6
Guide books	2,4	4,2	3,6

For foreign visitors, previous visits have also become important as a source of information, again emphasizing the role of repeat visits. Websites and guide books are also more important for foreign tourists than Romanian visitors.

#### *Information sources for foreign tourists, 2009*

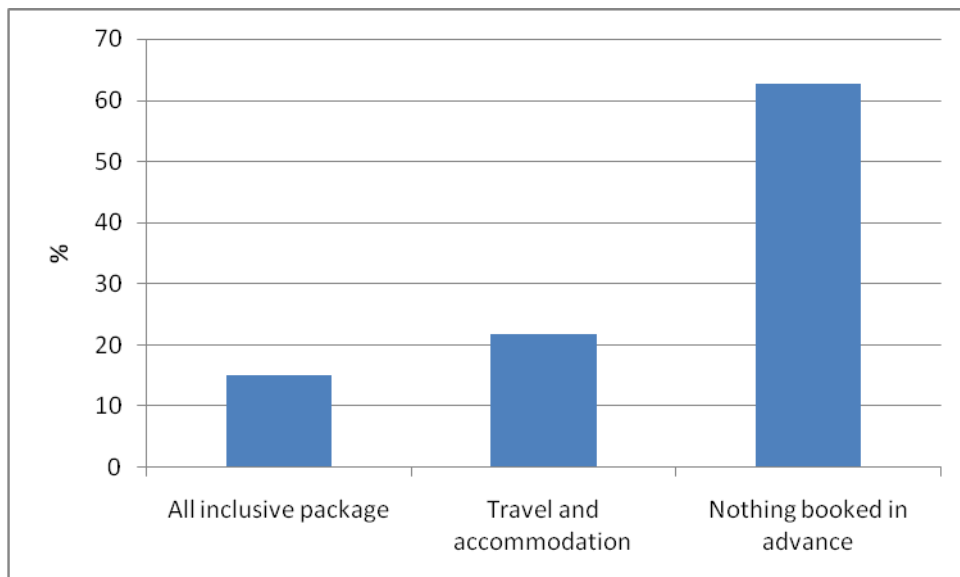




### *Booking channels*

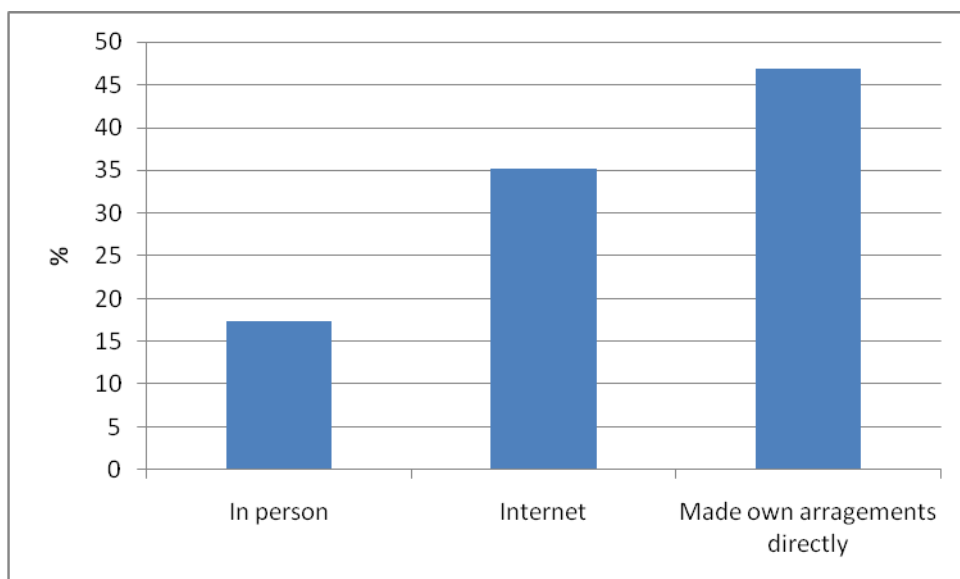
The vast majority of visitors did not make any advance booking for their trip. Only about 20% of visitors booked some form of travel or accommodation arrangements separately, and around 15% booked an all inclusive package.

### *Booking behavior 2009*



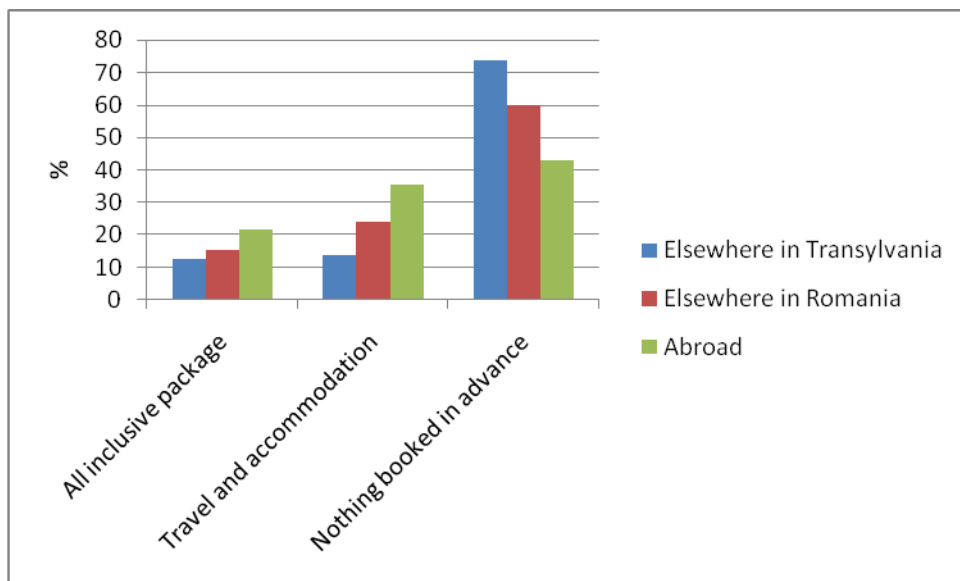
Of those who did book travel or accommodation in advance, the majority made their booking direct with the supplier. Just over a third booked via Internet and around 17% made a booking through a travel agent or tour operator.

### *Booking channels used 2009*



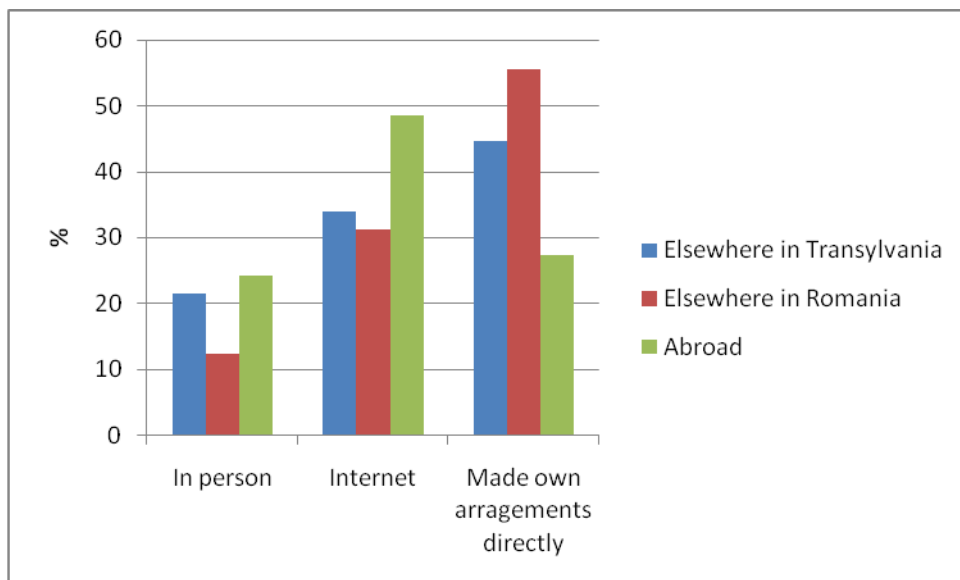
In general, foreign visitors were much more likely than domestic visitors to have made travel or accommodation bookings in advance. Over 70% of domestic tourists made no prior booking.

### *Booking behavior by visitor origin 2009*



In terms of the channels used by those making bookings, Internet was the most important channels for foreign visitors. For Romanian tourists Internet bookings were more important than personal visits to a travel agent, but most frequently they made booking direct with hotels or transport companies.

### *Booking channels used by visitor origin 2009*



A comparison with the booking channels used in 2007 underlines the growing importance of Internet as a booking channel, particularly for Romanian visitors. In 2007 less than 20% of Romanian visitors booked via Internet, compared with over 30% in 2009. Interestingly, Internet booking is more common among older visitors. Over half the visitors over the age of 50 who booked in advance did so over the Internet, compared with less than 30% of younger visitors.

## Visitor behavior

One of the key questions about a major cultural event such as the ECOC is the effect it has on the consumption of cultural attractions by visitors. People who came to the ECOC in 2007 primarily to participate in an event in the ECOC programme obviously have a positive impact on the economy and the cultural life of the city. But if they also get involved in the wider cultural life of the city and visit other attractions, this may help to spread the impact of the event and to persuade visitors to stay longer in the city.

The evidence from 2007 suggests that almost two thirds of respondents also made visits to other cultural sites in and around Sibiu.

Since 2007, it is clear that visitors to the city have been visiting an even wider range of attractions. In particular, visits to the Lower Town and the Fortifications have steadily increased, reflecting the investment in these areas.

### *Sites visited in and around Sibiu (% of visitors)*

	2007	2008	2009
Orthodox Cathedral	27	40	50
Bruckenthal Museum	27	71	61
Evangelic Church	25	60	46
The Lower Town	25	35	52
ASTRA Museum	20	58	58
The fortification	19	25	38
Thalia Hall	14		
National Theater Radu Stanca	13		
Fortified Churches around Sibiu	12	24	24
Street animation		50	42
None of these	36	4	7

*Multiple responses allowed*

A positive trend is the increasing number of different sites visited by tourists in and around the city. In the ECOC year itself the average number of sites visited was just under two per person, but this has increased to nearly four per person in 2009. This rise is probably due to the more focused nature of visitors in 2007, who were also visiting specific events in the ECOC programme. However, the general trend does indicate that there is now more interest in seeing more of the cultural sites.

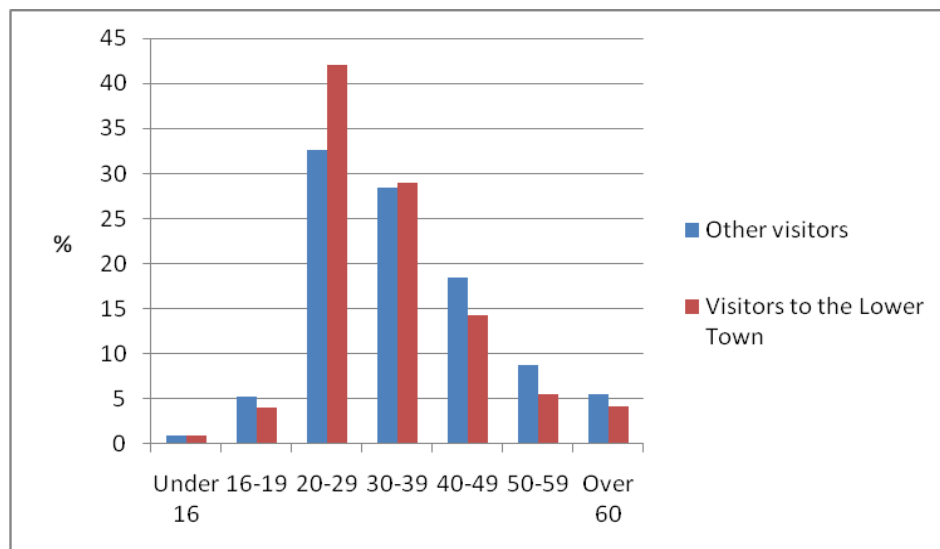
### *Average number of sites visited in and around Sibiu 2007-2009*

Origin	2007	2008	2009
Sibiu	1,8	3,9	4,2
Elsewhere in Transylvania	1,4	3,5	3,2
Elsewhere in Romania	2,2	3,7	3,3
Abroad	2,0	3,3	3,7
Total	1,9	3,6	3,7

The data indicate that residents of Sibiu are making more cultural visits, along with foreign tourists. The number of visits for Romanian tourists has declined slightly.

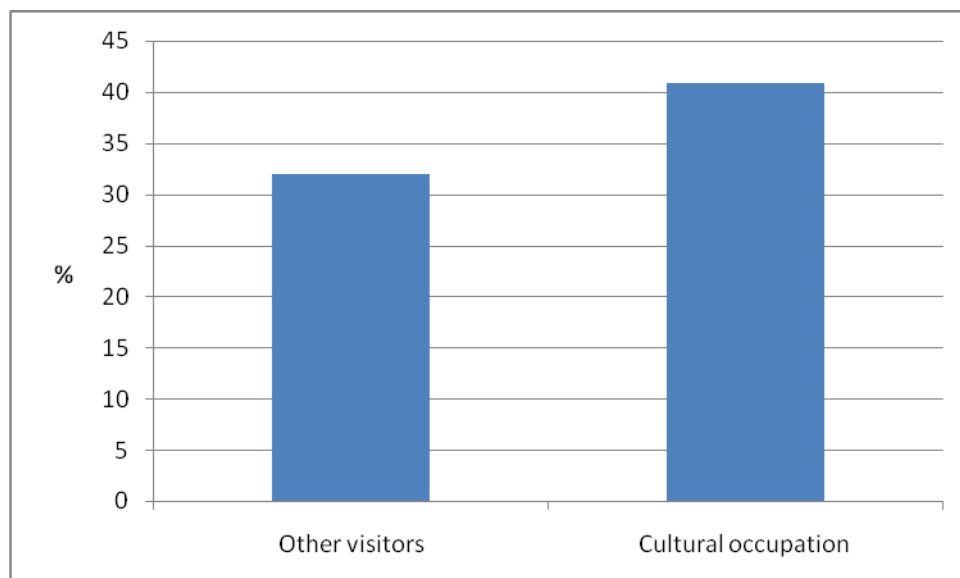
The sites visited depended to some extent on the profile of the visitors. For example, visitors to the lower town were more likely to be younger, more highly educated women.

#### *Visits to the Lower Town by age group 2009*



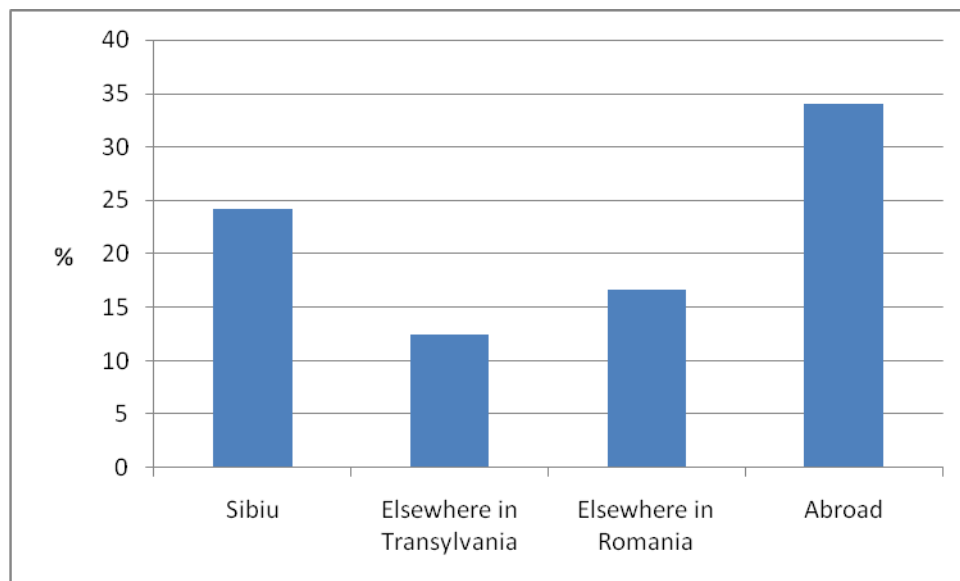
Visitors to the fortified churches around Sibiu were more likely to have a cultural occupation than those who did not visit.

#### *Visits to the fortified churches around Sibiu by cultural occupation 2009*



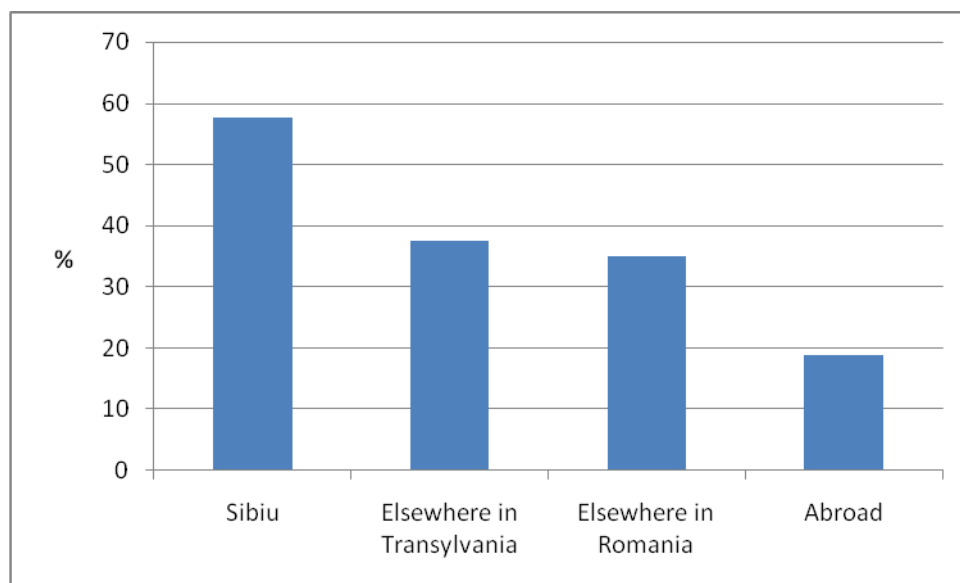
The fortified churches were also more likely to appeal to visitors from abroad than those from the Sibiu region, perhaps because these sites are unusual for foreigners compared with local visitors.

*Visits to the fortified churches around Sibiu by visitor origin, 2009*



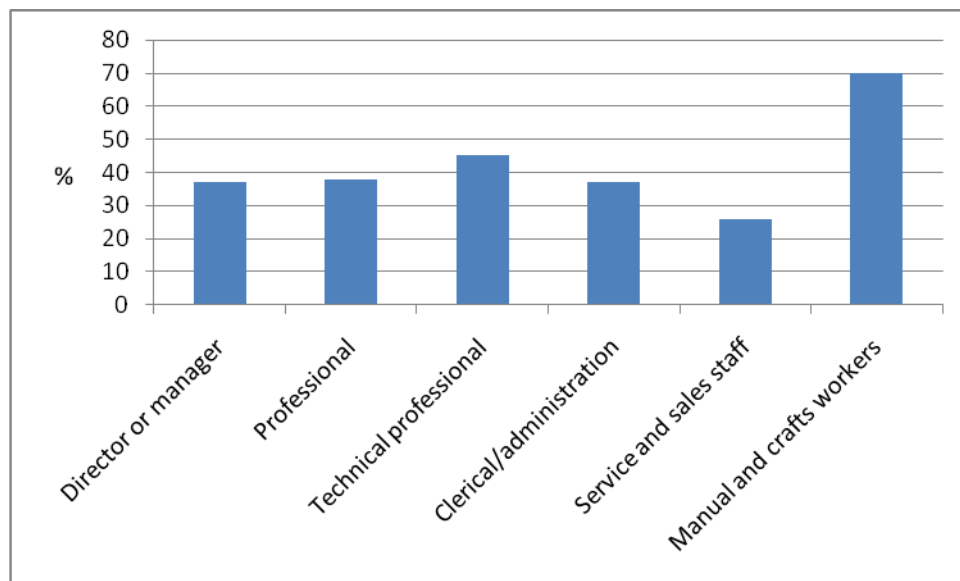
In contrast, street animation was more likely to appeal to local visitors.

*Visitors to street animation performances by origin, 2009*



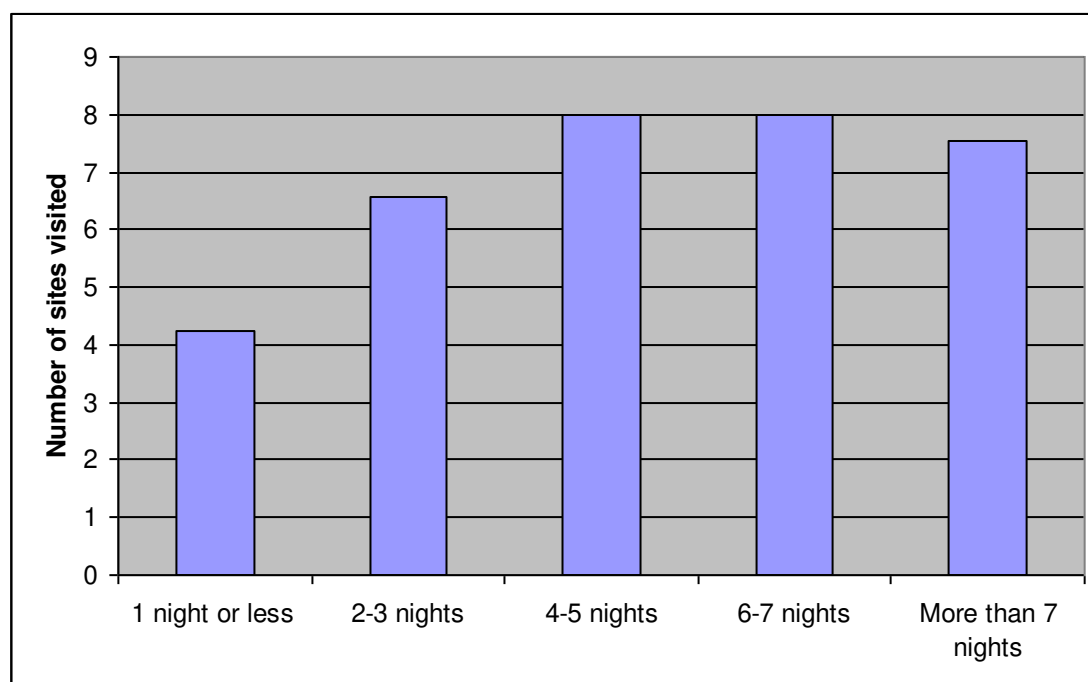
The type of attractions visited all have a close relationship with the background of visitors in terms of education and occupation. For example, craft workers and those in the technical professions were particularly likely to have visited the city fortifications.

### *Visits to the city fortifications by occupation, 2009*



The longer visitors stay in the city, the more likely they are to visit a wide range of different sites. Visitors who stayed at least four nights visited twice as many sites as those staying one night or less. Visitors staying four or more nights were particularly likely to visit sites outside Sibiu such as the fortified churches.

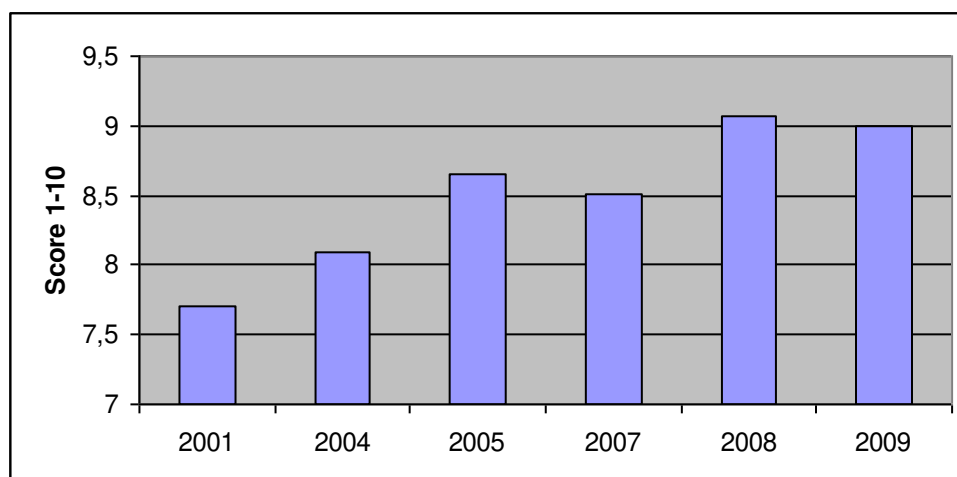
### *Number of sites visited by length of stay, 2009*



## Quality of visitor experience

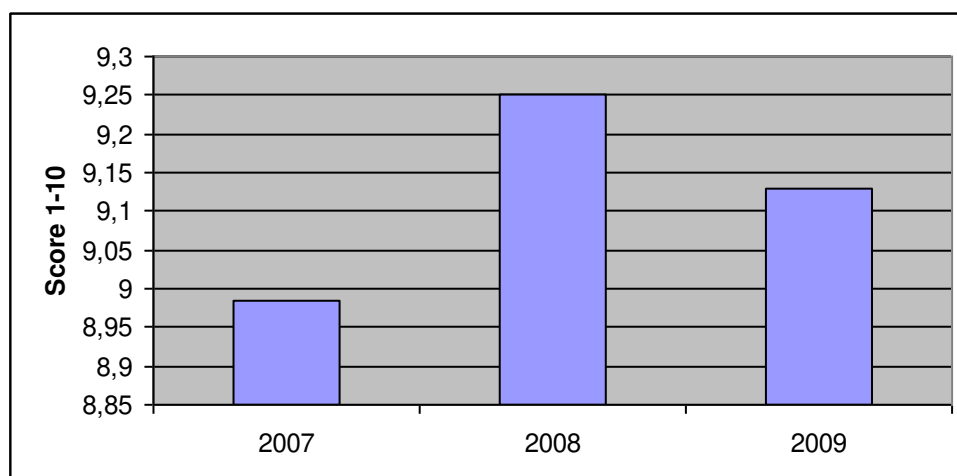
As Sibiu has developed its tourism and cultural product, so the visitor experience has improved as well. When asked to score the quality of their visit to Sibiu, the perceived quality has improved considerably since 2001. The ECOC in 2007 did not in itself produce an increase in the quality of experience, which may point to a more critical cultural audience being attracted by that event. However, it seems that one legacy of the event is a markedly increased visit quality.

*Quality of visit (scale 1-10)*



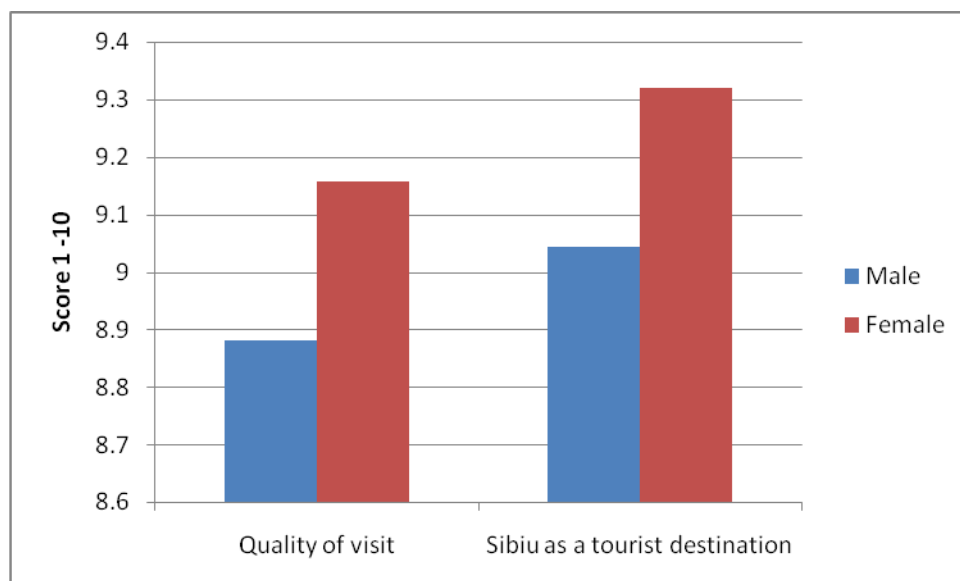
The improved quality scores in 2008 and 2009 are related to improvements in the tourism product and the provision of better destination facilities. Visitors therefore gave Sibiu a higher score as a tourist destination after 2007.

*City as a tourist destination (Scale 1-10)*



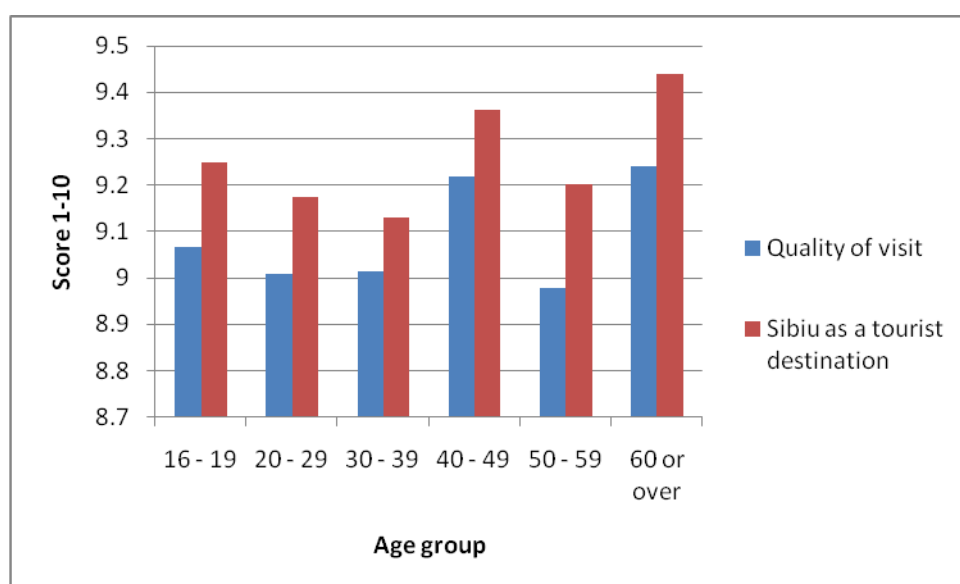
Women were more likely to give a higher rating for the quality of visit and for Sibiu as a tourist destination.

### Quality scores by gender 2009



Quality ratings tended to be highest for the older age groups. However there were also indications that those people with young families (between 30 and 40) also tended to give the lowest scores for Sibiu as a tourist destination.

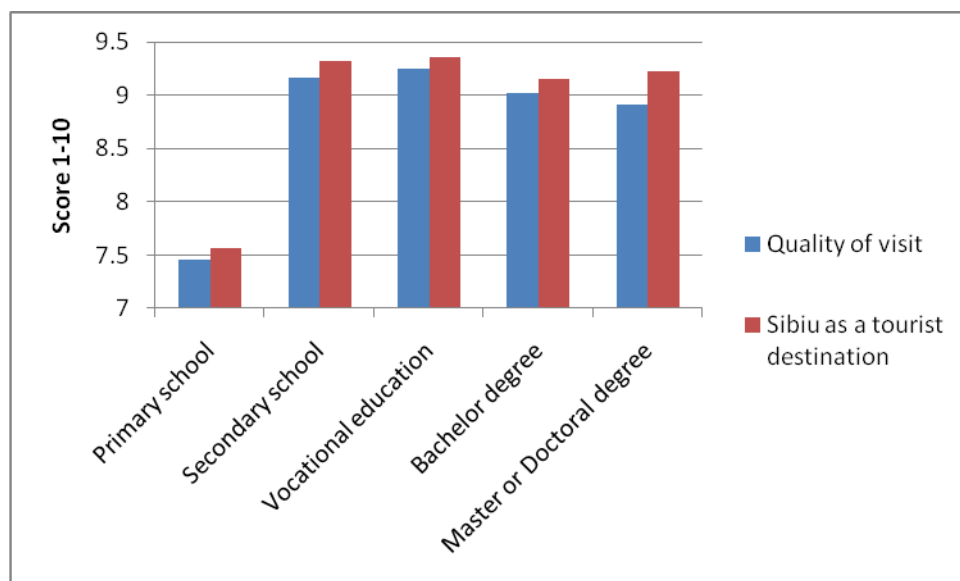
### Quality scores by age group 2009



Those with lower education levels tended to give the lowest quality scores. This may be because certain aspects of the cultural offer are not so easily accessible to those with a lower education level.

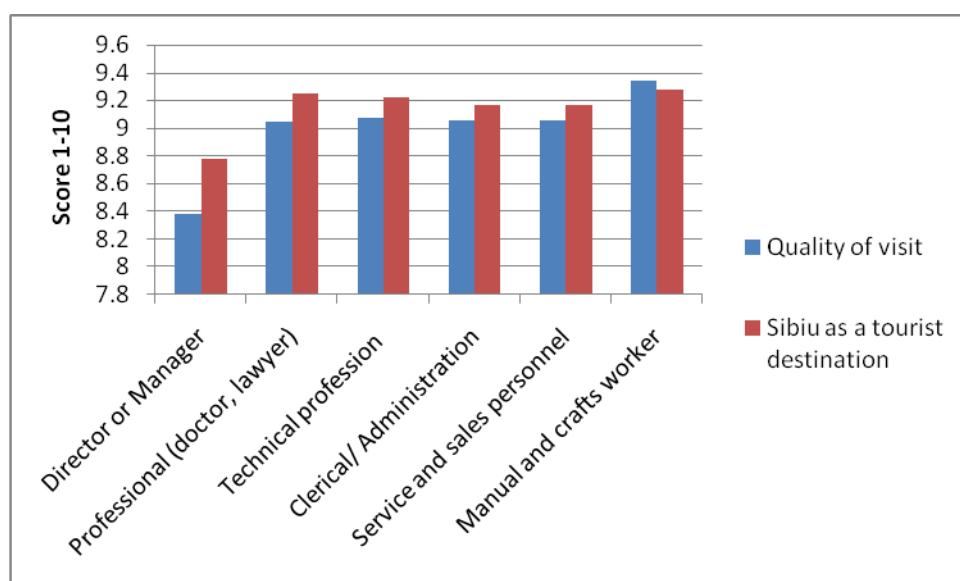


### Quality scores by highest education level 2009



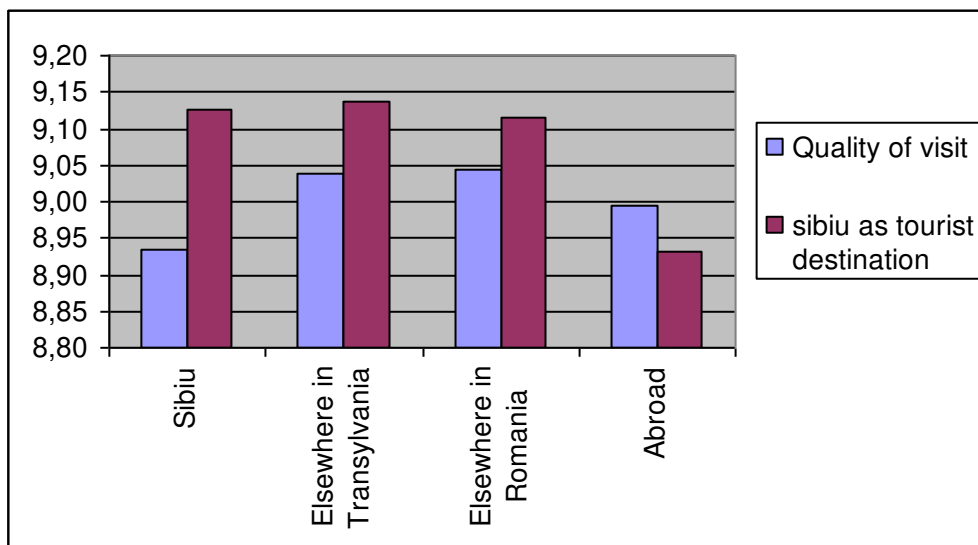
In terms of occupational profile, the quality ratings for Sibiu tended to be highest among professionals and manual and crafts workers.

### Quality scores by occupational group 2009



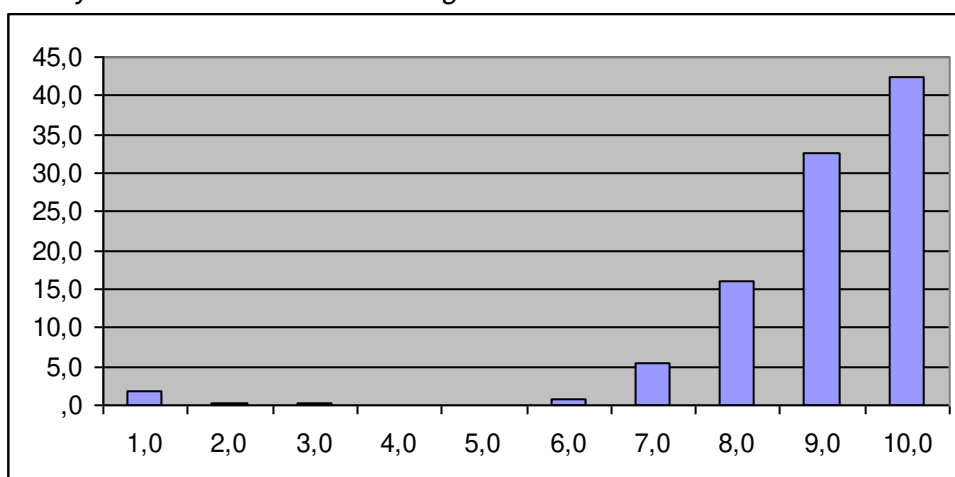
There was relatively little variation in quality scores by visitor origin. In general, residents of Sibiu tended to be more critical than visitors, and foreign visitors also tended to give lower scores than Romanian visitors. This is probably because the foreign visitors are more likely to compare Sibiu with other cities abroad, whereas for Romanian tourists the comparisons will be made with other Romanian cities. This underlines the relatively strong position of Sibiu in the domestic market, but shows that it still needs to develop against international standards.

### Quality scores by visitor origin 2009



Even though foreign visitors scored Sibiu lower on average than Romanian visitors, it is clear that they also tend to give relatively high scores, with over three quarters scoring a 9 or 10.

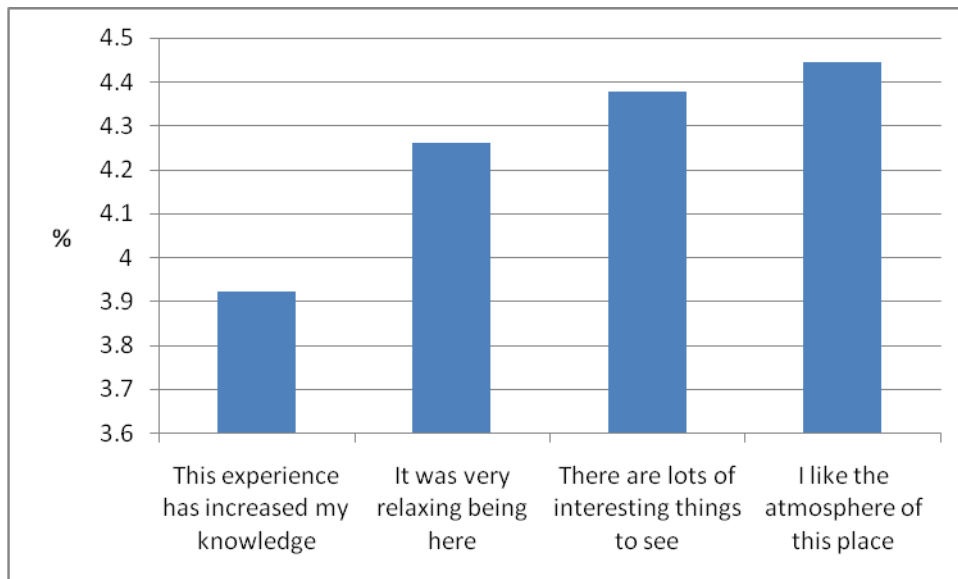
### Quality score distributions for foreign visitors



### Aspects of the visitor experience

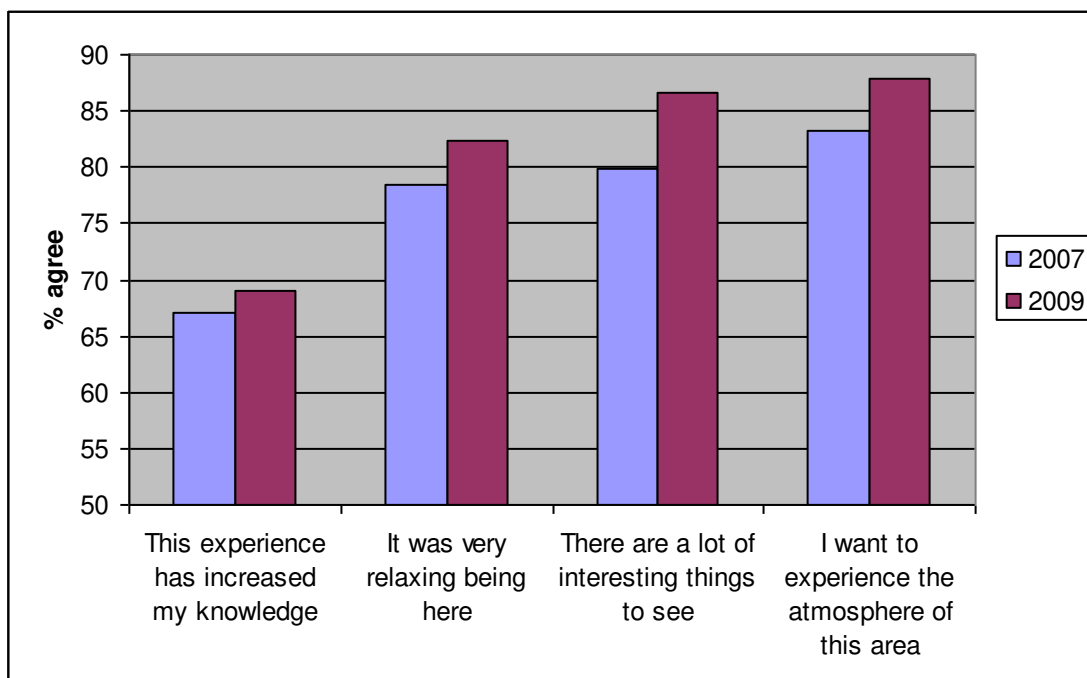
When asked about more specific aspects of their experience, visitors were most likely to emphasize the atmosphere of Sibiu. This matches the ATLAS surveys carried out in other areas, although cultural tourists in particular are more likely to emphasize learning outcomes than other visitors.

### Aspects of visitor experience in Sibiu 2009



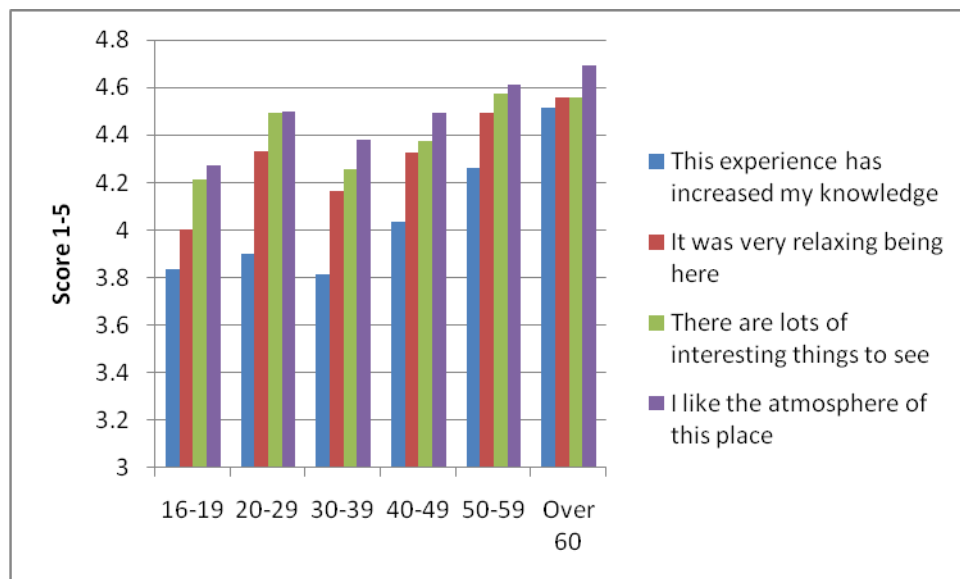
Just as with the quality scores, it seems that most aspects of the visitor experience have improved in recent years. In particular, visitors were more likely to agree that there were lots of interesting things to see in 2009 than in 2007.

### Aspects of visitor experience in 2007 and 2009



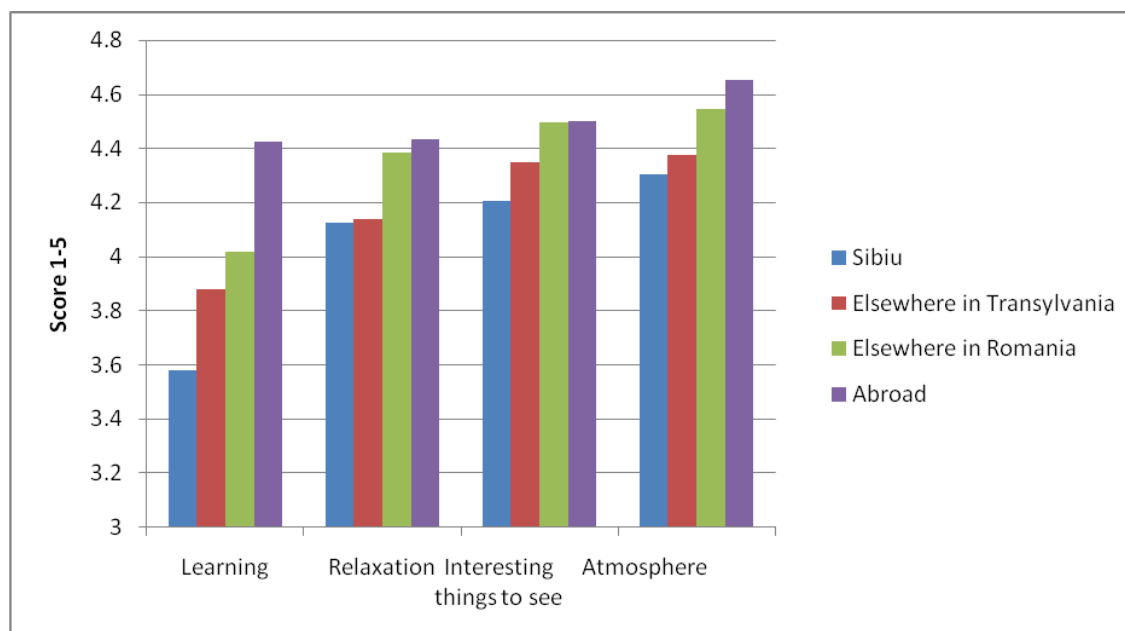
Older visitors were the most likely to agree that their visit had been positive in all aspects of the experience, whereas younger visitors tended to give a much higher score to the atmosphere than to the learning aspects of the experience.

### Aspects of visitor experience by age group, 2009



Foreign visitors tended to emphasize all the different aspects of the experience more strongly than domestic visitors or local residents. This suggests that Sibiu is able to offer an all-round experience for foreign tourists. There was a particularly big difference in term of learning aspects, probably because locals already feel they know Sibiu well. The learning aspect of the visit was also more important for first-time visitors than repeat visitors.

### Aspects of visitor experience by visitor origin, 2009

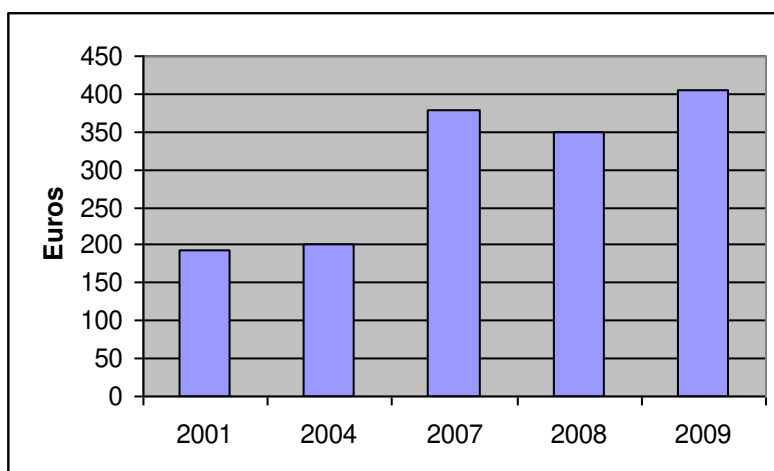


## Economic impact

An important aspect of the ECOC is the economic impact that it can have on the host city. The bulk of the economic impact of the ECOC usually comes from visitor spending, because visitors inject new money into the local economy. In 2007 we estimated that the total economic impact directly attributable to staying visitors to the ECOC was €19.35 million. It is difficult to compare this figure directly with other years, because the ECOC as a direct visit motivation is no longer there.

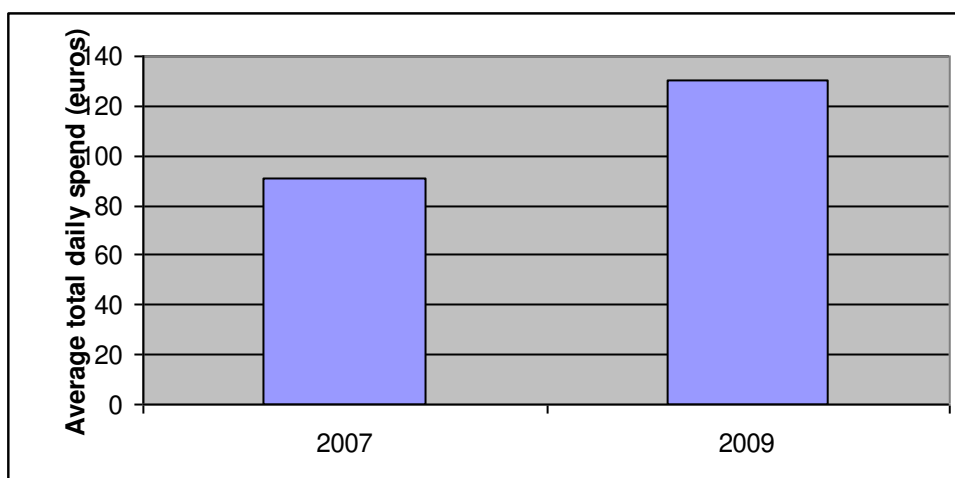
However, the figures on average visitor spending show that spend levels have increased since 2007. The average visitor to Sibiu now spends almost twice as much as the average visitor before 2007. Again, this underlines the structural change in the nature of the tourist market.

*Average total visitor spend 2001-2009*



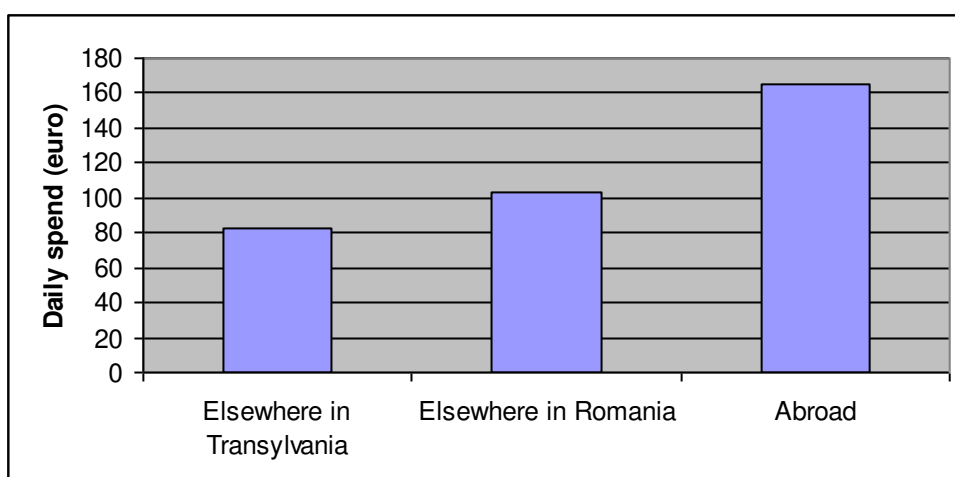
Total average visitor expenditure increased very little between 2007 and 2009. This is basically because the ECOC attracted a relatively high number of foreign tourists and other high spending guests. However, the average daily spend has increased significantly since 2007, largely as a result of a shift in spending patterns (see below).

*Average spend per day (Euros) 2007 and 2009*



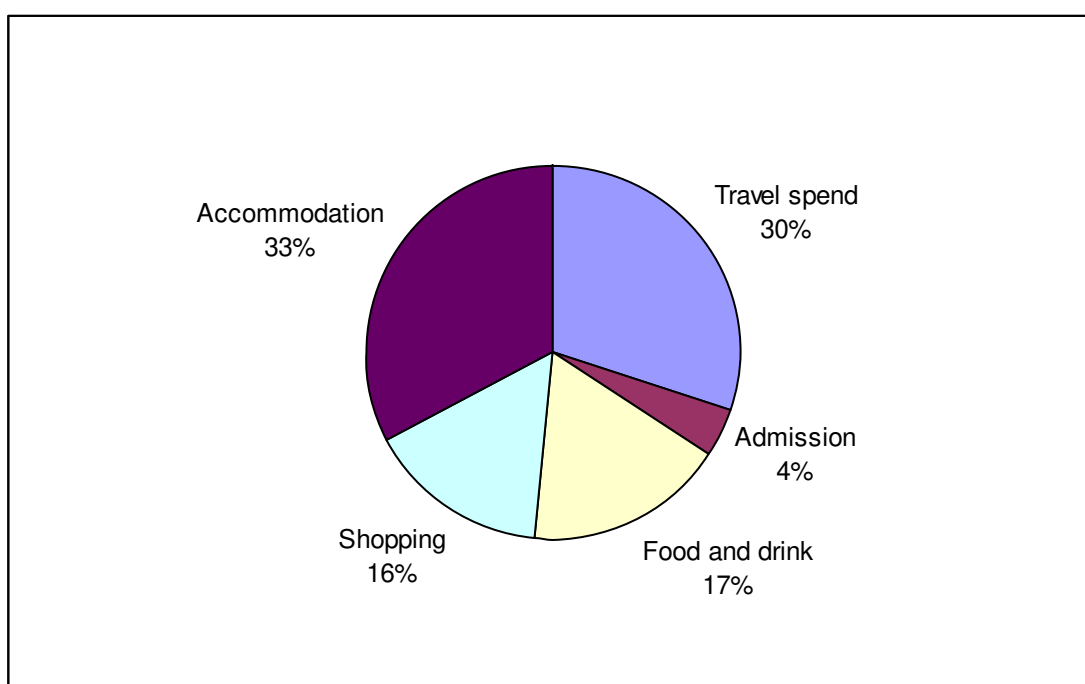
Not surprisingly the average daily spend of foreign tourists is significantly higher than that of Romanian visitors. However, the difference in daily spend between tourists from other parts of Romania and from abroad is perhaps lower than might be expected, probably because these visitors are more likely to be using commercial tourism accommodation.

*Average spend per day (Euros) by visitor origin 2009*

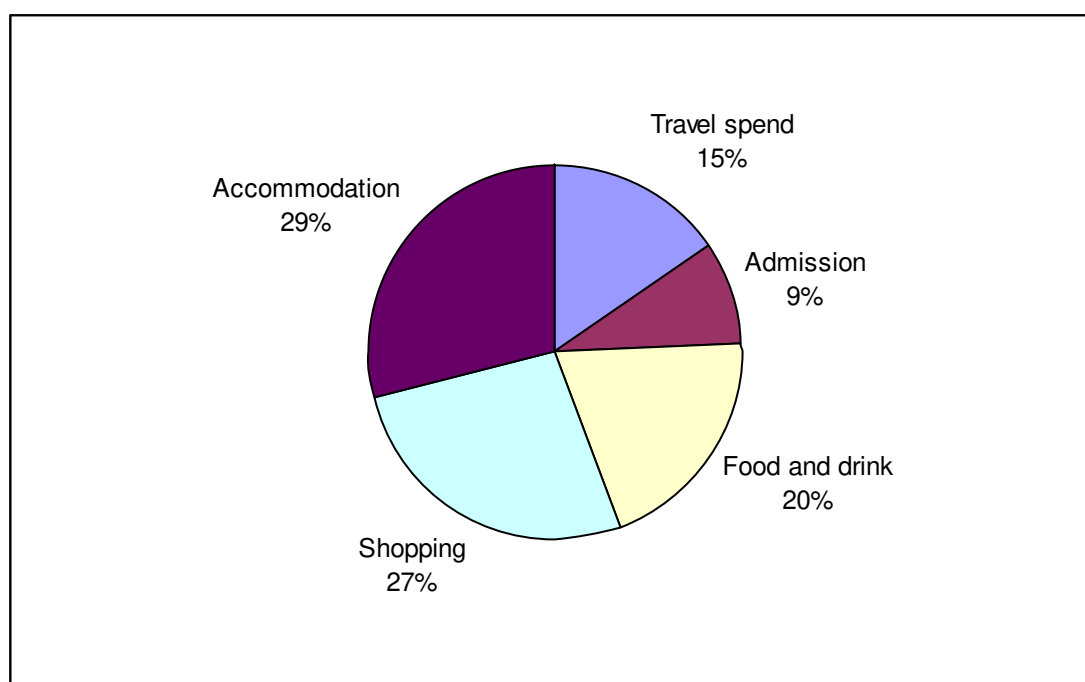


In 2009 relatively more was spent on shopping and admissions, and less on travel (reflecting the higher level of domestic tourism).

*Visitor spend by category 2007 (excludes Sibiu residents)*



*Visitor spend by category 2009 (excludes Sibiu residents)*



If we exclude travel expenditure, however, the spending by visitors in the city of Sibiu itself was significantly higher in 2009.

*Spend in Sibiu (excluding travel costs)*

	Total
2007	303,06
2009	406,58

Expenditure was particularly high for hotel guests, who tended to spend almost twice as much as other visitors.

*Spend by hotel guests in Euros*

	Travel spend	Admission	Food and drink	Shopping	Accommodation
2007	212,14	21,53	126,24	87,89	250,19
2009	157,69	62,44	145,27	277,18	269,39

Not surprisingly, the highest spend was made by visitors from abroad, who tend to have much higher travel and accommodation costs than Romanian visitors. However, the economic impact of foreign visitors on the local economy is not as great as the total expenditure suggests, because a large proportion of the total is spent on transportation to reach Sibiu. Even if travel costs are excluded, however, spending by foreign visitors in the city is still much greater than for domestic tourists.

### *Spend by visitor origin in Euros*

Visitor origin	Travel spend	Admission	Food and drink	Shopping	Accommodation
Elsewhere in Transylvania	36.79	26.22	65.37	95.74	150.26
Elsewhere in Romania	66.11	35.84	108.83	140.58	159.58
Abroad	300.50	152.49	186.13	281.59	314.16
Total	77.82	49.22	99.58	136.91	178.93

For the local economy, the most important data relates to those tourists actually staying in the Sibiu region, because these visitors spend money on accommodation in the region, and therefore have a greater economic impact. Visitors staying in Sibiu spent considerably more than visitors staying in the region around Sibiu, mainly because they spent far less on shopping. The accommodation spend in the Sibiu region was however higher than for visitors staying in other parts of Romania, a sign that the accommodation facilities in the region have been upgraded in recent years.

### *Spend by visitor origin in Euros for tourists staying in Sibiu city*

	Travel spend	Admission	Food and drink	Shopping	Accommodation	Total
Sibiu Region	41.33	3.00	20.33	50.00	160.00	132.33
Transylvania	30.22	40.00	60.24	130.67	132.00	226.09
Elsewhere in Romania	33.36	22.50	76.54	120.50	103.75	255.50

### **Total tourism expenditure trends**

Although the ECOC is no longer a specific motivation for tourists to visit Sibiu, we can still calculate the total tourism spend in the city for the period before, during and after the ECOC to see if spend levels have increased.

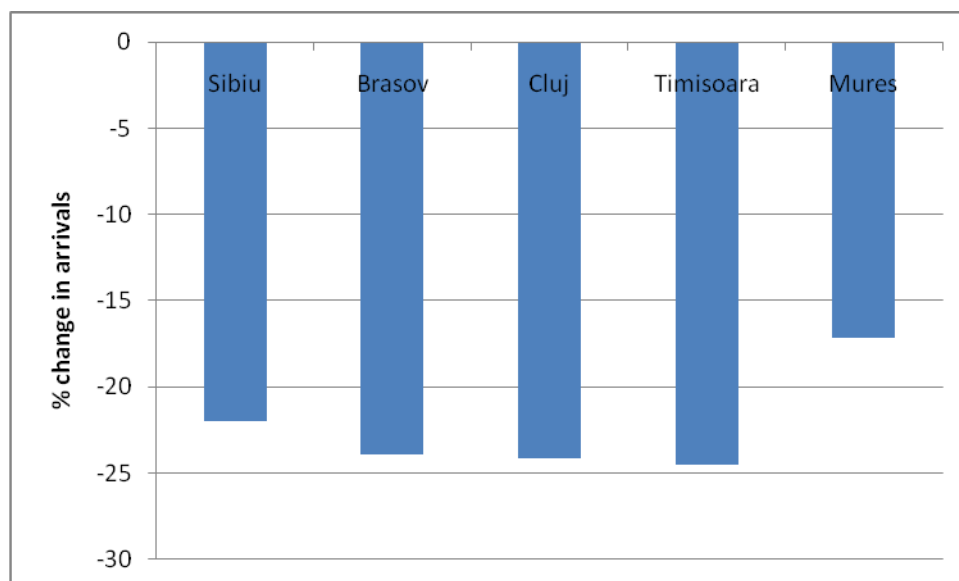
### *Tourist arrivals and bednights in Sibiu 2006-2009*

	<b>Arrivals</b>	<b>Bednights</b>
<b>2006</b>	150,000	235,000
<b>2007</b>	178,532	280,993
<b>2008</b>	147,000	204,005
<b>2009</b>	120,373	164,281

The data for 2008 and 2009 show a sharp decline in tourist arrivals and overnights, which is probably related in 2008 to post-ECOC decline and in 2009 to the economic crisis. It is clear that the decline in arrivals and expenditure follows national and regional trends. Compared to other cities in Transylvania, for example, the decline in arrivals in 2009 has been lower in Sibiu than in any other city except those of Mures County. Nationally, the first 11 months of 2009 saw a decline in tourist overnights of more than 16%, which indicates that Transylvania as a whole has been hit by the decline in tourism worse than the country as a whole. However, evidence from the interviews (see below) also indicates that many individual businesses in Sibiu have seen an increase in tourism, in spite of the general economic climate.



### *Change in arrivals in major towns in the region 2009*



The other important point to note about the trends in arrivals is that recent data indicate a significant shift away from officially registered accommodation into unregistered accommodation or staying with friends and relatives. In Sibiu County, for example, over 30% of accommodation capacity inventoried is not classified according to the standards of the Ministry of Tourism (see also Appendix 4). This may tend to exaggerate the extent of the decline in tourism arrivals and expenditure.

In estimating total expenditure we have used the official tourism statistics on the number of bednights spent in hotels and other registered forms of accommodation. This excludes people staying with friends and family, which in 2009 for example might have increased the total expenditure in Sibiu by around 20% (see Appendix 4).

### *Total spending by visitors staying in Sibiu according to official statistics, 2007-2009*

	overnights	spend per night	Total spend (million euro)
2007	280,993	91	25.6
2008	204,005	85	17.3
2009	164,281	130	21.4

On the basis of the tourists staying in registered accommodation in Sibiu city alone, total tourism spend was around €26 million in 2007, the ECOC year. Most of this impact was due to visitors coming for the ECOC, as these visitors tended to spend far more on average than other tourists, particularly as the event attracted many foreign tourists. It is not surprising, therefore, that the economic impact of tourism declined in 2008. But the higher average spends in 2009 has maintained the overall economic impact at a higher level than in 2008. It seems that the increased number of high spending tourists attracted by the cultural image and new attractions of the city has to some extent mitigated the effects of the decline in tourism as a result of the crisis.

If we add the impact of visitors staying with friends and relatives, then the indications are that total tourism spending has been maintained at around the same level as in 2007, in spite of the economic crisis. This is partly due to the increased spending by hotel guests, many of whom are now staying in higher quality hotels accommodation thanks to the development of the hotel

stock for the ECOC, and partly due to the growth in VFR travel. The surveys also indicate that many of the visitors coming to Sibiu in 2009 had visited previously in 2007. This seems to suggest that the ECOC had a direct impact on repeat visitation, with many of those returning now staying with friends and relatives instead of in commercial accommodation.

*Total visitor spending including VFR tourists*

	Total spend by tourists in official accommodation (million euro)	% VFR visitors	Total spend by VFR tourists (million euro)	Total spend by all tourists (million euro)
2007	25.6	26	8.5	34.1
2008	17.3	15	6.4	23.7
2009	21.4	31	13.7	35.1

### **Tourism Development Effects**

It is difficult to separate the impacts of the ECOC itself from the general growth in tourism supply in Sibiu, which would probably have shown some growth without the ECOC as well. However, looking at the pace of growth, it is clear that the period after 2007 has seen a substantial increase in the supply of hotels and other accommodation facilities.

In particular there was a sharp increase in the number of hotels and hotel beds in the city of Sibiu itself.

*Capacity in Sibiu county hotels, 2006-2009 according to official statistics*

	2006	2007	2009
units	22	27	43
rooms	1072	1227	1988

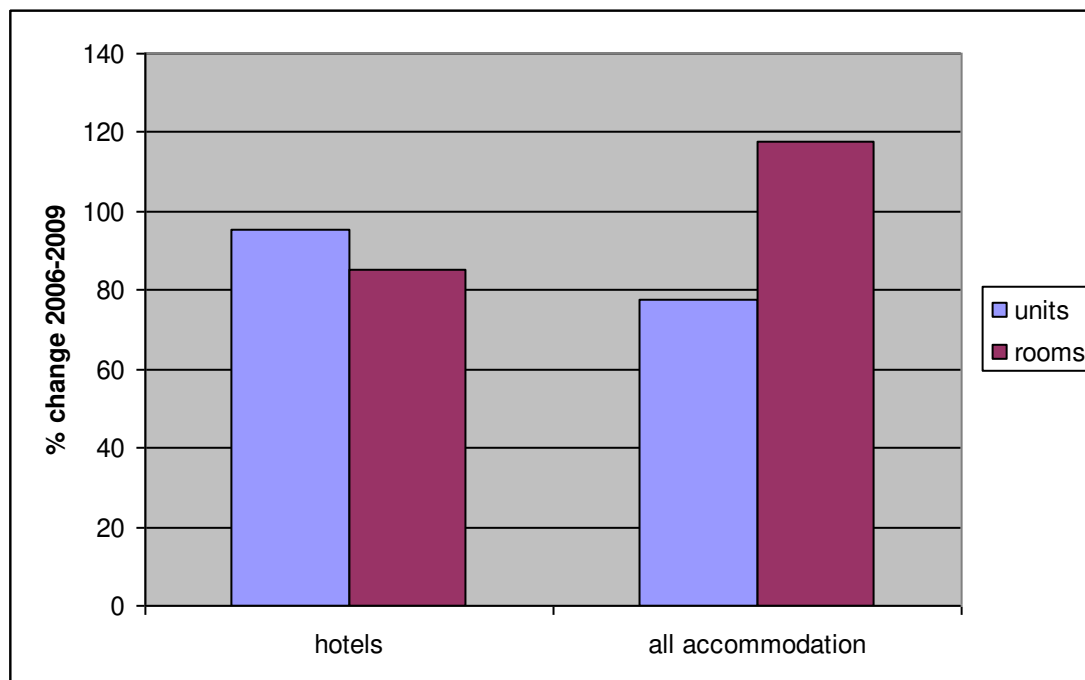
However, this growth has been reflected to some extent across the county of Sibiu and in other categories of accommodation as well.

*Capacity in Sibiu county all accommodation, 2006-2009 according to official statistics*

	2006	2007	2009
units	271	359	481
rooms	2316	3057	5039

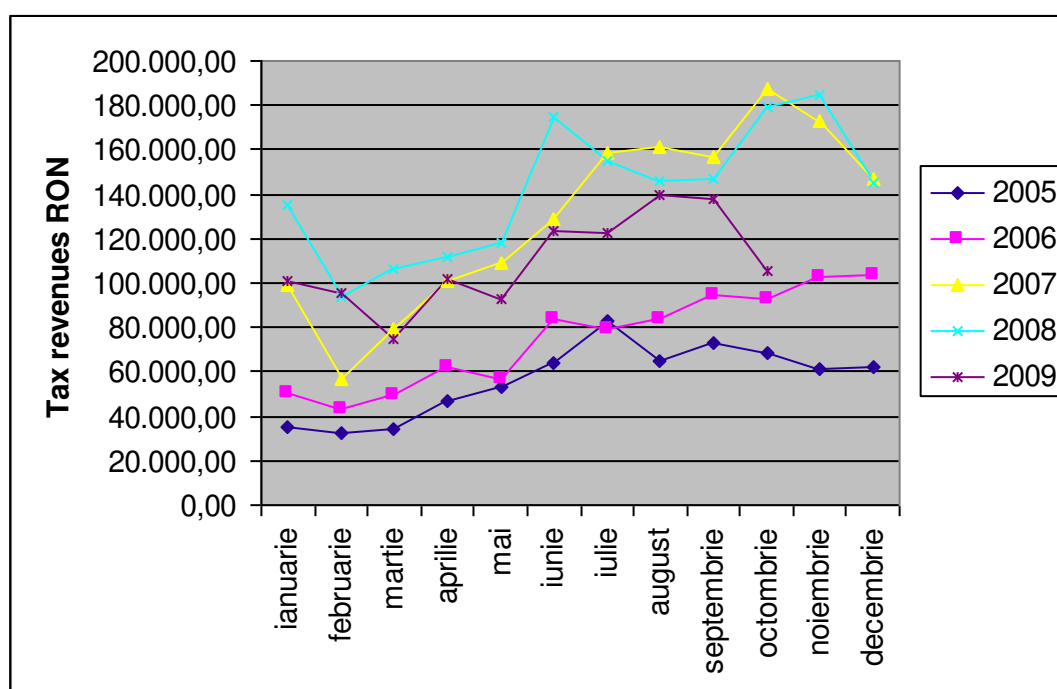
The overall result has been a doubling of total accommodation supply since 2006. See also Appendix 4 for no registered capacities

### % growth in accommodation supply 2006-2009



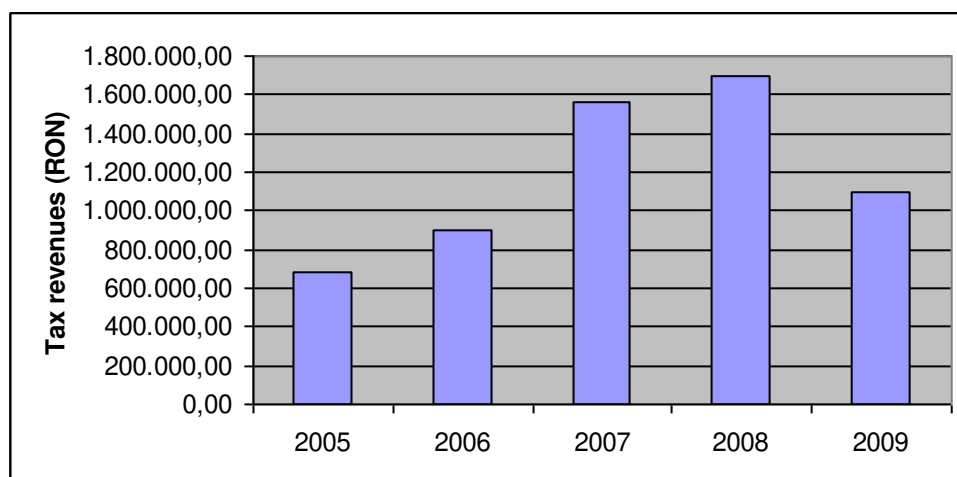
Trends in the economic impact of tourism are also evident from the data on tourism tax revenues. These show clearly that 2007 marked a giant leap forward in terms of the development of the tourism economy of the city and the contribution of tourism to civic finances. Tourism tax revenues grew by over 70% between 2006 and 2007, and have remained at these high levels in 2008 and 2009. In spite of the general downturn in tourism in Romania, tax revenues were still 70% higher in the first half of 2009 than they were in 2006. This shows that the ECOC was successful in stimulating a qualitative change in the development of the tourism industry in the city.

### Accommodation tax revenues, 2005-2009



Accommodation tax revenues fell in 2009, with a particularly sharp decline in the latter part of the year as the effects of the economic crisis became acute. Even so, the indications are that hotel turnover in 2009 was still significantly above 2006 levels.

#### *Total hotel tax revenues 2005-2009*



(data for 2009 only from January – October)

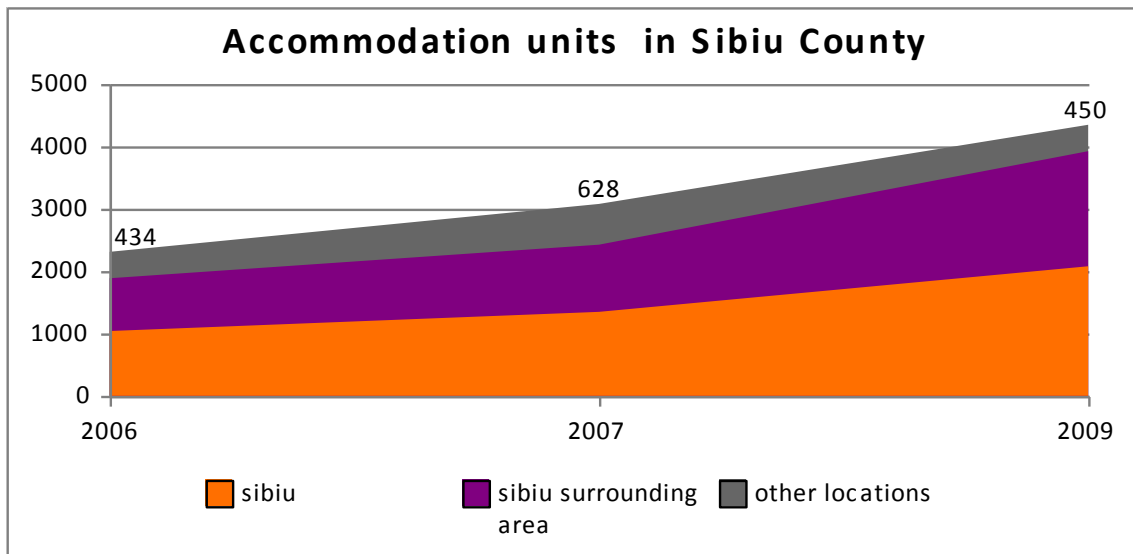
Some of the increase in hotel revenues is due to tourism growth, but there is also an important effect from the upgrading in the hotel stock. By 2009 Sibiu had an additional 6 four or five star hotels compared with 2006.

#### *Category of hotel accommodation in Sibiu*

	unclassified	1*	2*	3*	4*	5*	total
2006			6	6	1		13
2008			5	9	1		15
2009	3	1	7	12	6	1	30

Because many of the hotel projects related to the ECOC were not actually operational until 2007 or even in 2008, the biggest effects of hotel development were actually felt the year after the ECOC. Not only did tourism increase, but visitors also stayed in higher grade accommodation and therefore paid higher average room rates. This picture only began to reverse in 2009 with the effects of the crisis, but this decline is also in line with national trends.

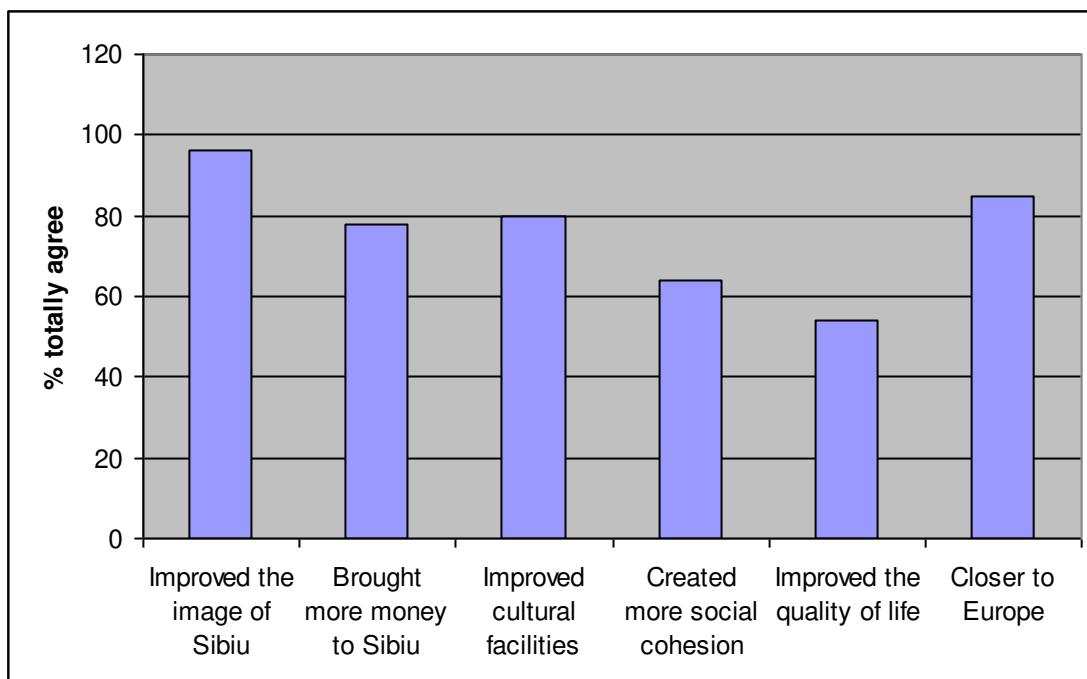
The growth of hotel accommodation in Sibiu itself also had a strong impact on the surrounding region. Growth in the regions close to Sibiu was just as strong as in the city itself.



## Perceived impacts of the ECOC

Our surveys demonstrate clearly that the vast majority of people feel that the ECOC has had a positive impact on Sibiu. The impacts most frequently mentioned by respondents are an improvement in the image of the city, bringing the city closer to Europe, the economic impact of the event and improvements to cultural facilities.

*Statements about the impact of the ECOC on Sibiu, 2009 (all respondents)*



The majority of respondents also agreed that the ECOC had created more social cohesion in Sibiu and improved the overall quality of life. This is a very good result, given the more intangible nature of these impacts.

It is also significant that the perceptions of impacts have remained strong even in the years after ECOC. In most other cities the memory of the ECOC quickly fades, and people are often far less able to see the benefits. But Sibiu exhibits relatively little decline in appreciation of the impacts, which suggests the dramatic nature of the changes in some areas.

*Statements about the impact on Sibiu 2007-2009*

% totally agree	2007	2008	2009
Improved the image of Sibiu	98	92	94
Brought more money to Sibiu	94	82	78
Improved cultural facilities	89	79	78
Created more social cohesion	67	62	65
Improved the quality of life	53	61	52
Brought Sibiu closer to the rest of Europe		85	86

When asked about the media attention generated by the ECOC, the vast majority of respondents agreed that the city had received more national and international coverage as a result of the event. It seems that people feel that there was more international attention for Sibiu in 2009, but this is not surprising given the tendency for the international media to turn their attention on the new Capitals of Culture as soon as the ECOC year is finished.

*More attention for Sibiu in the national media as a result of the European Capital of Culture?*

	2008	2009
Yes	83	76
No	3	7
Don't know	14	17

*More attention for Sibiu in the international media as a result of the European Capital of Culture?*

	2008	2009
Yes	76	61
No	8	8
Don't know	17	31

In terms of the overall evaluation of the ECOC, 84% of those surveyed in 2009 agreed that Sibiu had made good use of the ECOC, only slightly lower than the level in 2008.

*Overall, do you think Sibiu made good use of the opportunity of being European Capital of Culture in 2007?*

%	2008	2009
Yes	86	84
No	3	4
Don't know	11	12

The impressions of the impacts of the ECOC tended to be even more positive among residents. This is not surprising, since they are better able to see and feel the changes in the city. Almost all Sibiu residents totally agreed that the ECOC had improved the image of the city, had brought more money and have improved cultural facilities. Visitors from abroad were often less likely to agree, but usually because they did not know about the changes.

*Impacts of ECOC 2007 by origin*

% totally agree	Sibiu	Elsewhere in Transylvania	Elsewhere in Romania	Abroad
Improved the image of Sibiu	99,1%	95,4%	95,8%	88,7%
Brought more money to Sibiu	86,3%	72,3%	77,5%	75,5%
Improved cultural facilities	85,8%	79,0%	79,3%	79,2%
Created more social cohesion	69,2%	67,5%	57,3%	60,4%
Improved the quality of life	60,0%	56,4%	55,9%	44,2%
brought Sibiu closer to the rest of Europe	90,1%	83,4%	86,0%	77,4%
Do you think there is more attention for Sibiu in the national media as a result of the European Capital of Culture?	86,5%	80,7%	79,1%	61,5%
Do you think there is more attention for Sibiu in the international media as a result of the European Capital of Culture?	63,3%	55,1%	57,7%	54,7%
Overall, do you think Sibiu made good use of the opportunity of being European Capital of Culture in 2007?	91,9%	78,7%	82,8%	81,1%

For those people from outside Sibiu who visited the European Capital of Culture in 2007, their impressions tended to be more positive than people who did not visit in 2007. This indicates that the ECOC had a lasting effect in improving the image of the city and making visitors positive about Sibiu. In particular, those who visited the city in 2007 were much more likely to appreciate the social cohesion impacts of the event than other visitors.

*Improved image of Sibiu by visit to the ECOC programme*

		Did you visit any of the ECOC 2007 events?		Total
		Yes	No	
Improved the image of Sibiu	Totally	99,2%	93,7%	97,1%
	Partially		2,1%	,8%
	Not at all	0,8%	4,2%	2,1%
Total		100,0%	100,0%	100,0%

*Brought more money to Sibiu by previous visit in 2007*

		Visited Sibiu in 2007?		Total
		Yes	No	
Brought more money to Sibiu	Totally	77,1%	67,0%	74,7%
	Partially	2,8%	0,9%	2,4%
	Not at all	20,1%	32,1%	22,9%
Total		100,0%	100,0%	100,0%

There was a particularly significant difference between perceived social cohesion impacts of the ECOC and whether or not the respondents had visited in 2007.

*Created more social cohesion by previous visit in 2007*

		Visited Sibiu in 2007?		Total
		Yes	No	
Created more social cohesion	Totally	63,4%	48,1%	59,8%
	Partially	8,2%	5,6%	7,6%
	Not at all	28,4%	46,3%	32,6%
Total		100,0%	100,0%	100,0%

*Sibiu made good use of the opportunity of being European Capital of Culture by previous visit in 2007*

		Visited Sibiu in 2007?		Total
		Yes	No	
Overall, do you think Sibiu made good use of the opportunity of being European Capital of Culture in 2007?	Yes	86,8%	71,6%	83,2%
	No	2,0%	2,8%	2,2%
	Don't know	11,2%	25,7%	14,6%
Total		100,0%	100,0%	100,0%

Those who visited Sibiu in 2007 were also more likely than others to agree that Sibiu had improved. It therefore seems that improvements have taken place since 2007, not just during the ECOC year itself.



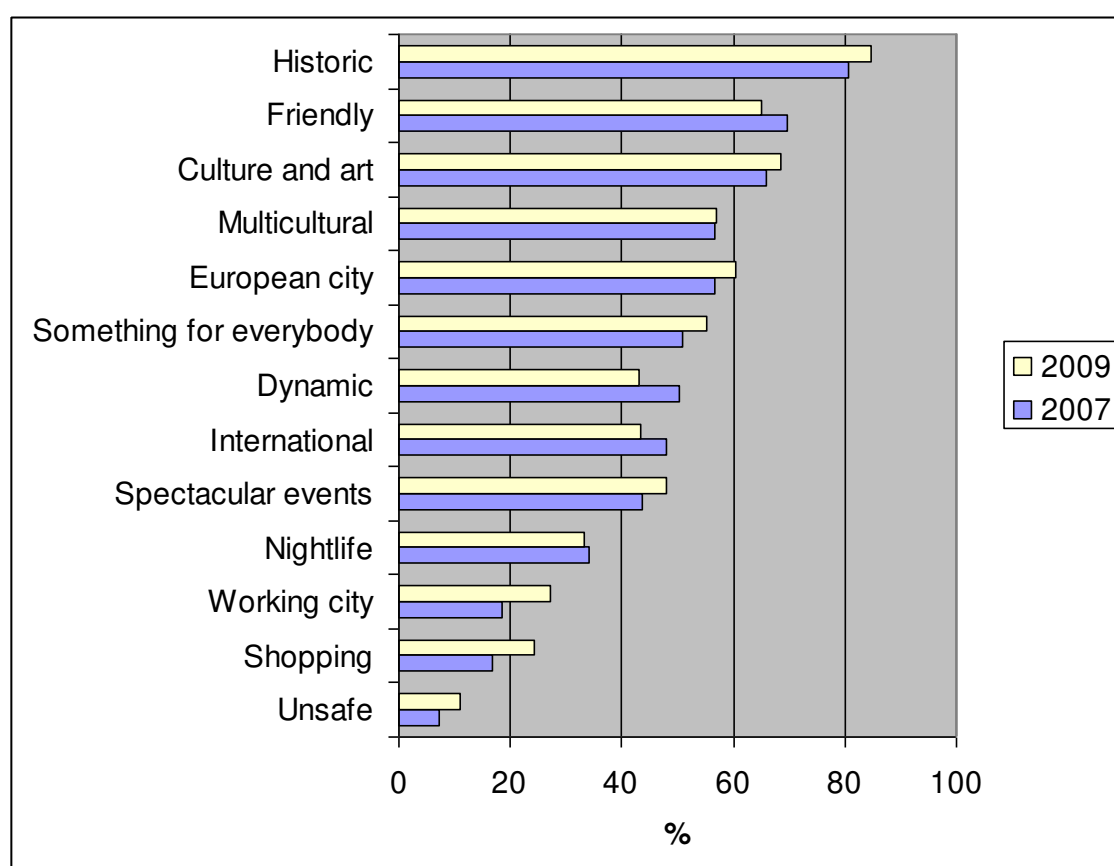
*Sibiu has improved as a tourism destination since 2007 by previous visit in 2007*

		Visited Sibiu in 2007?		Total
		Yes	No	
Do you think Sibiu has improved as a tourism destination since 2007?	Same	16,9%	9,2%	15,0%
	Better	33,4%	22,9%	30,9%
	worse	32,6%	25,7%	30,9%
	don't know	17,1%	42,2%	23,1%
Total		100,0%	100,0%	100,0%

## The image of Sibiu

The image of Sibiu has remained fairly positive since 2007. The strength of its image as a city with history and culture and art has increased slightly, as has its image as a European city.

*Image elements for Sibiu, 2007 and 2009, all respondents*



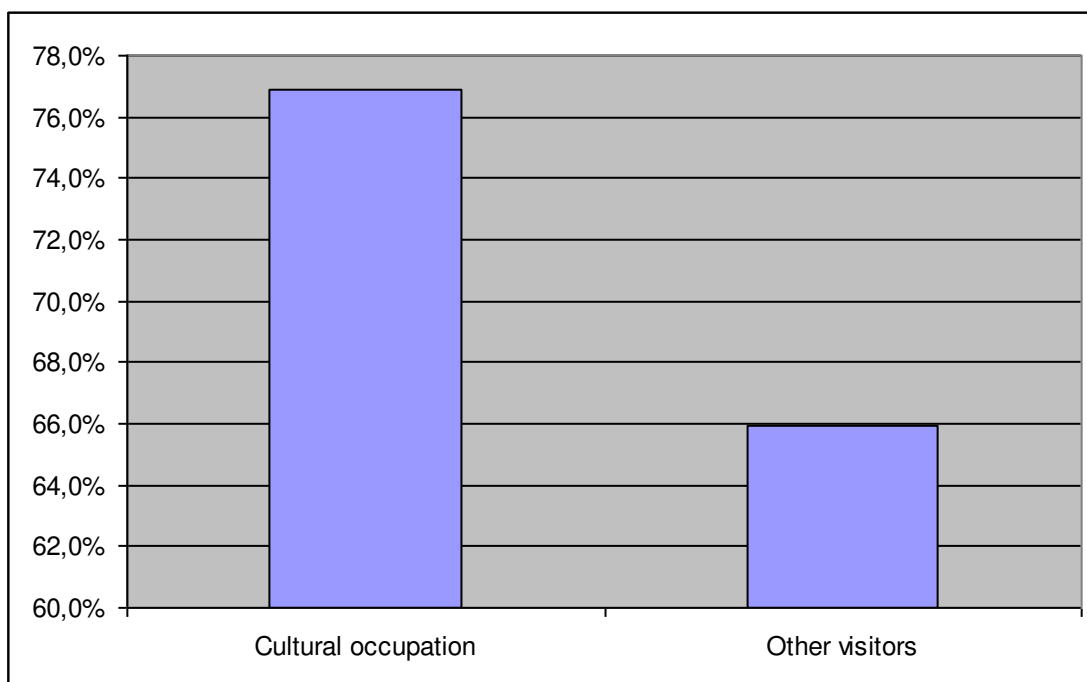
It is obvious that the image of Sibiu for a wide range of elements is not as strong for foreign visitors as Romanians, who are much more likely to have been to the city before. Foreign visitors are less likely to see Sibiu as international or European, but on the other hand they are just as likely as Romanian visitors to see the city as a friendly, historic city of culture and art, which shows the positive image impacts of the ECOOC and other recent developments.

*Image elements of Sibiu by visitor origin 2009*

	Sibiu	Elsewhere in Transylvania	Elsewhere in Romania	Abroad
International	43,9%	47,9%	41,5%	36,5%
Culture and art	69,1%	66,2%	68,4%	67,9%
Friendly	61,8%	63,1%	65,3%	66,0%
European city	63,1%	55,7%	60,1%	43,4%
Multicultural	56,8%	53,8%	57,1%	49,1%
Shopping	24,8%	25,6%	24,1%	9,4%
Working city	31,2%	21,5%	22,1%	13,2%
Unsafe	11,2%	11,9%	3,8%	13,2%
Nightlife	30,3%	37,8%	28,7%	26,4%
Dynamic	40,7%	41,7%	43,4%	39,6%
Historic	83,4%	81,5%	88,7%	88,7%
Something for everybody	52,9%	53,1%	56,8%	62,3%
Spectacular events	46,2%	45,6%	50,7%	47,2%

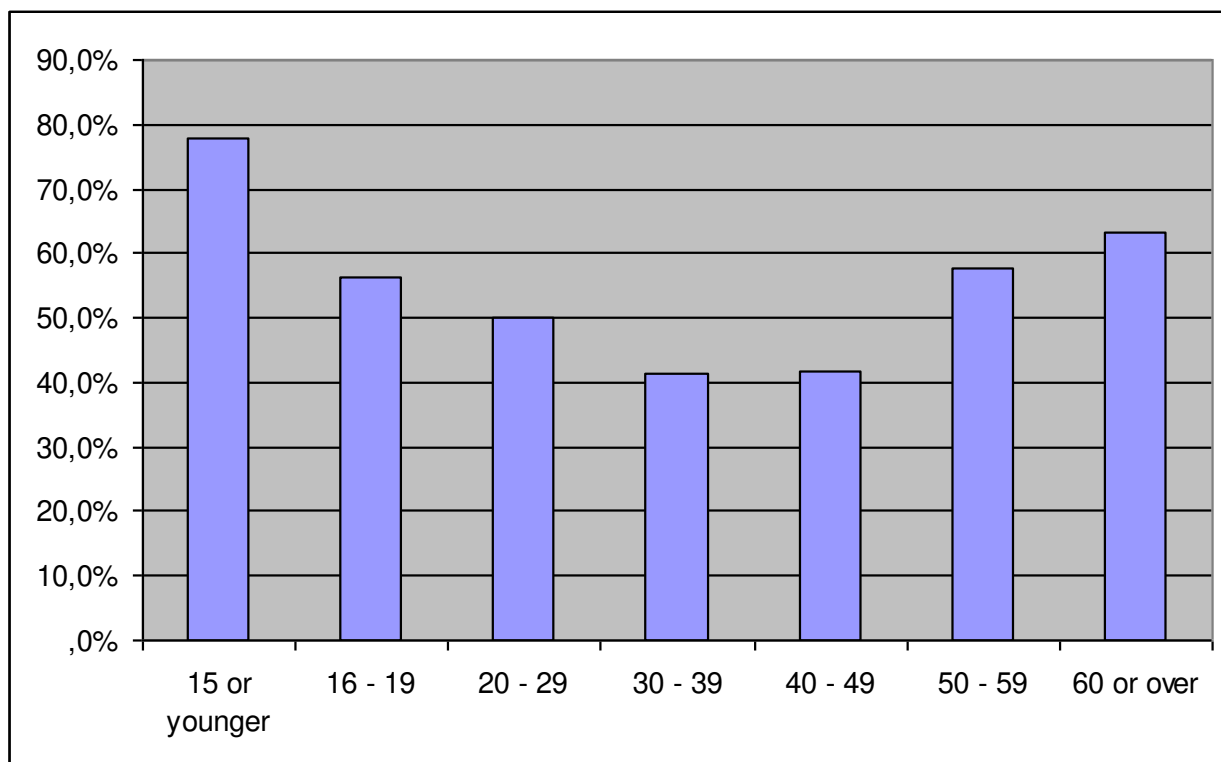
Visitors with a cultural occupation were more likely than other respondents to agree that Sibiu has a cultural image.

*Cultural image of Sibiu by occupation (% agree)*



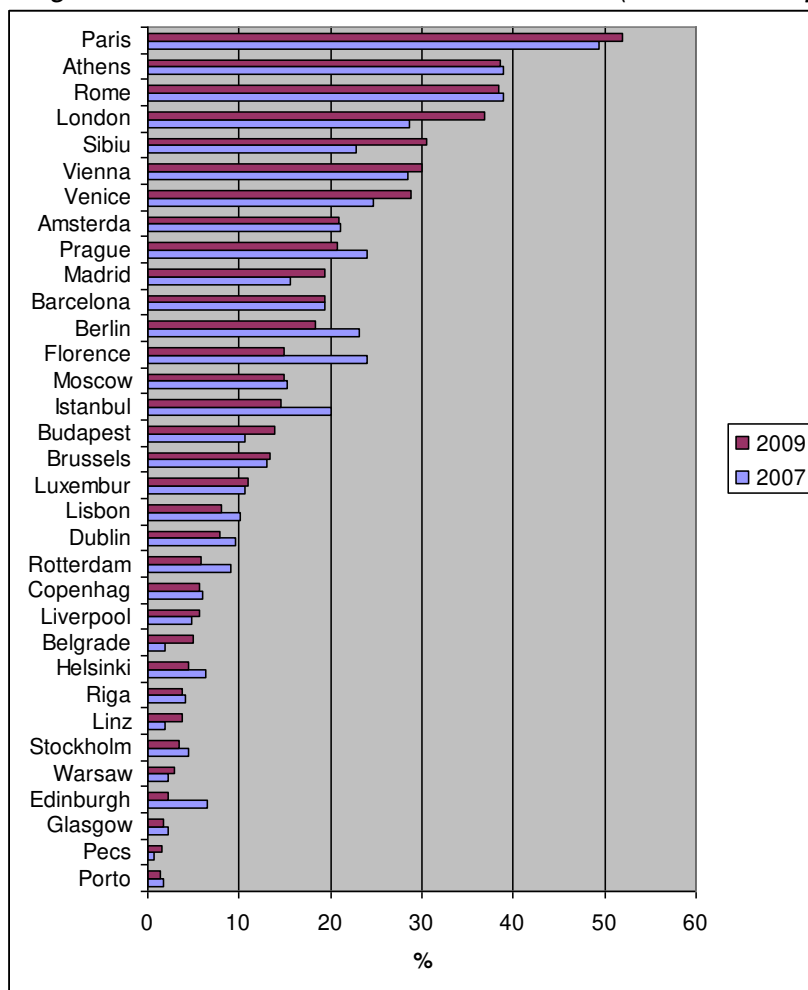
Interestingly, the image of Sibiu as a city with lots of events was strongest among those in the younger and older age groups. Those aged between 30 and 50 were much less likely to agree. This may indicate that Sibiu does not cater as well in terms of events for those with young families as it does for other groups.

*Image of Sibiu as a city with lots of events by age group (% agree)*



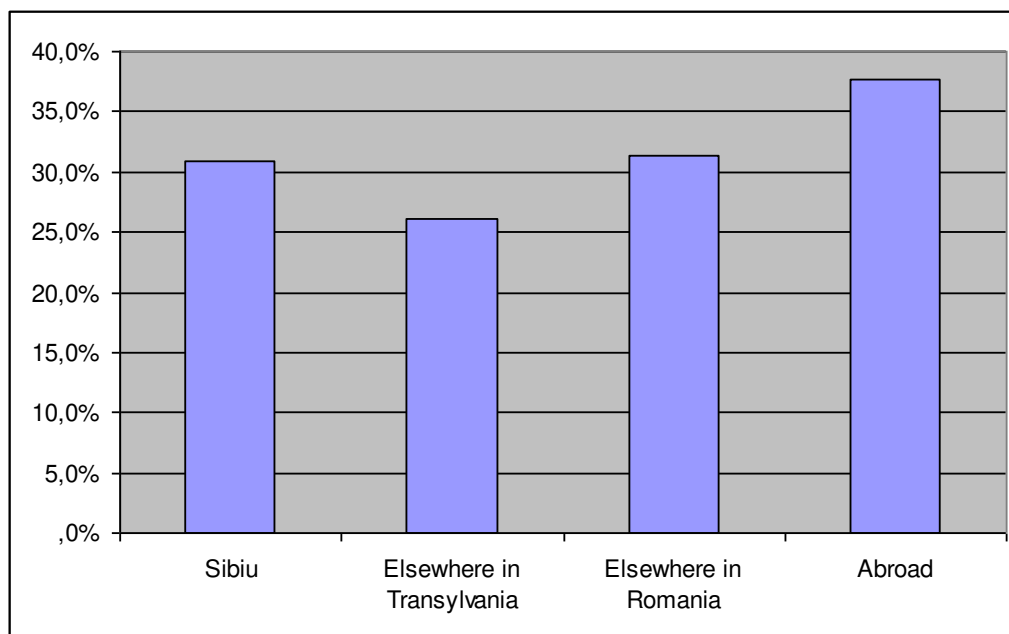
The image of Sibiu relative to other cultural destinations in Europe has also improved, reflecting the increased quality of the tourism offer. The relatively high scores for Sibiu as a cultural destination are of course caused mainly by Romanian respondents – Sibiu tends to score lower among foreign visitors relative to other European cities.

*Image of Sibiu as a cultural tourism destination (ATLAS Surveys 2007 and 2009)*



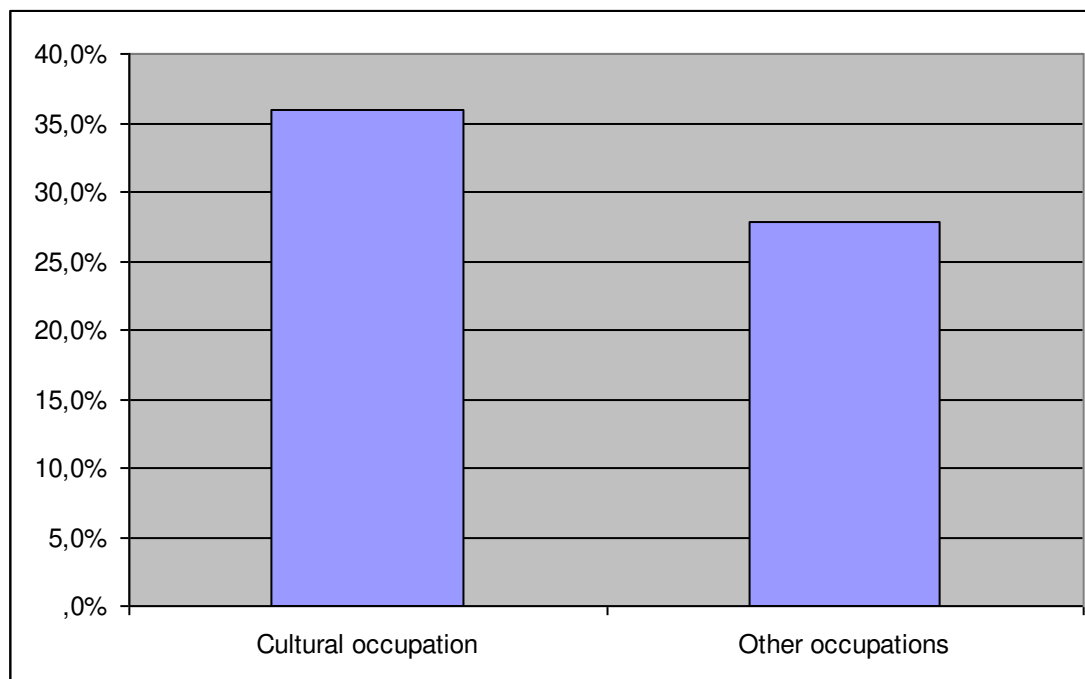
It is interesting to note that there is relatively little difference in the rating of Sibiu as a cultural destination according to visitor origin. One might expect residents of Sibiu to score their own city higher than visitors, but in fact visitors from abroad were most likely to see Sibiu as a top cultural destination relative to other European cities.

*Sibiu as one of the five top destinations by visitor origin 2009*



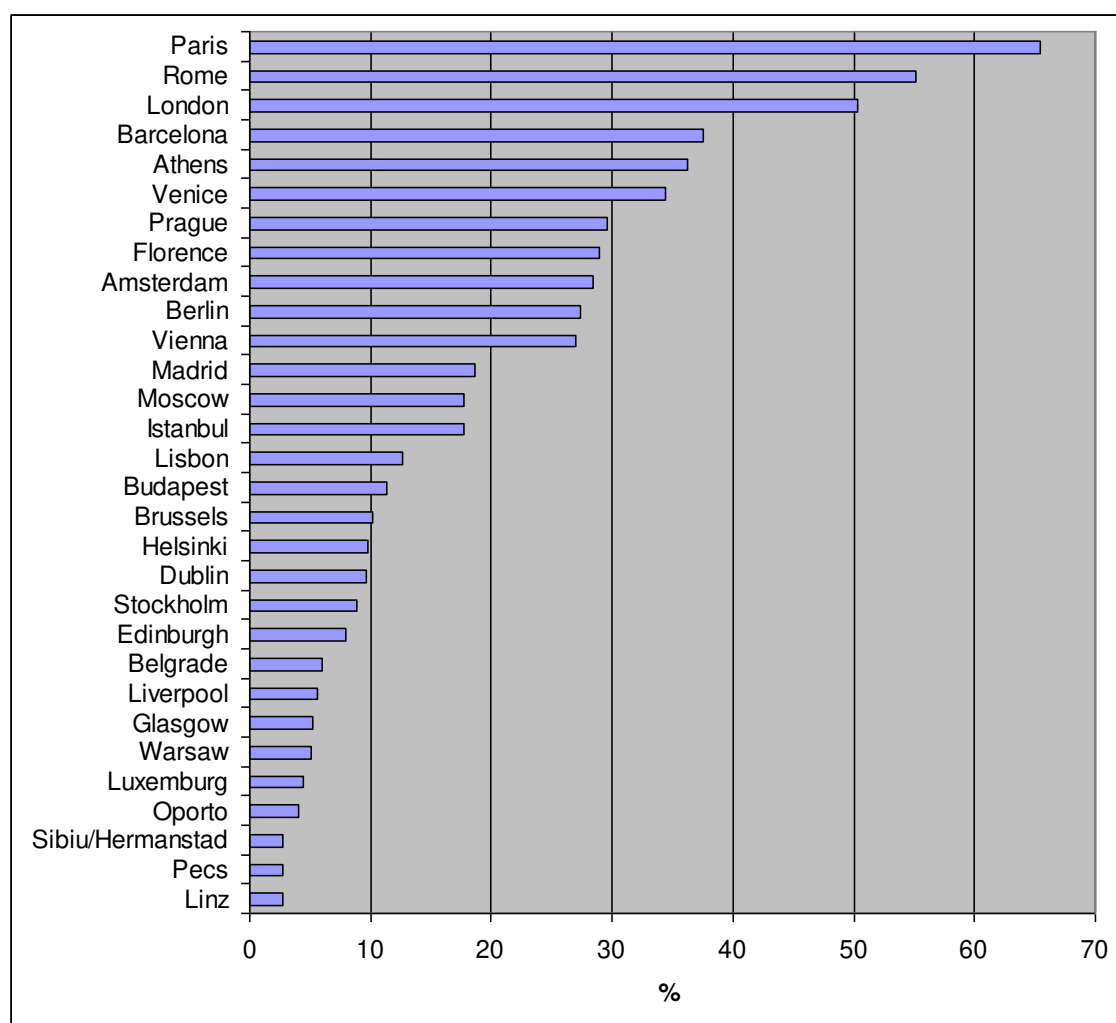
Respondents with a cultural occupation also tended to rate Sibiu higher as a cultural destination than other visitors.

*Sibiu as one of the five top destinations by cultural occupation 2009*



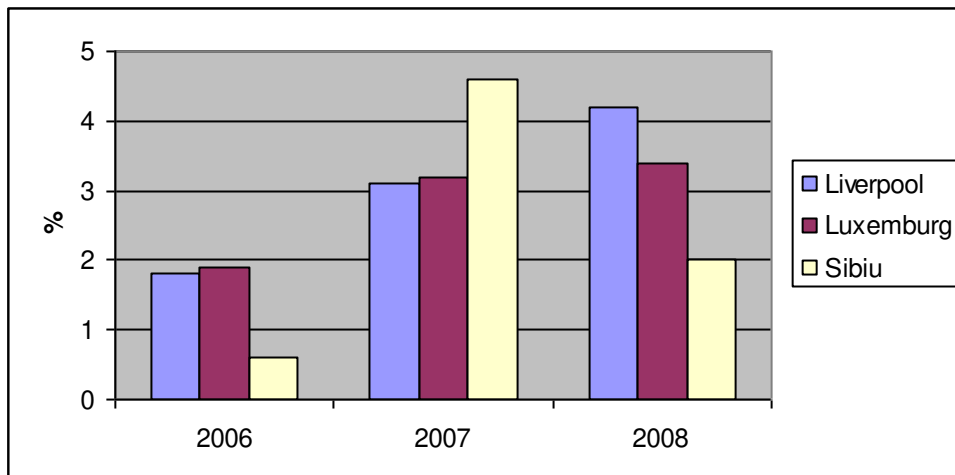
For the ATLAS surveys conducted in other parts of Europe, Sibiu of course scores much lower, as many people outside Romania will not even have heard of the city. In this light, the fact that Sibiu received as many votes as Linz (cultural capital in 2009) and Pecs (Cultural capital in 2010) in 2008 can be regarded as a good result. Initial results of the ATLAS surveys for 2009 also indicate that Sibiu has maintained its position above Pecs and Linz.

*City rankings as cultural destinations 2008 (ATLAS surveys in other European countries).*



Looking at the ATLAS surveys conducted in other parts of Europe over the past few years, it is also clear that Sibiu has had a positive impact from the ECOC outside Romania as well. Particularly in 2007 the external image of Sibiu rose very strongly, particularly as a result of the novelty value of a new European destination being exposed in the international media (this was a complaint voiced in Luxemburg in 2007, because there was a perception that Sibiu had obtained more media coverage with a smaller marketing budget than Luxemburg had generated). Although Sibiu has not scored as highly in subsequent ATLAS surveys, it still has a much higher score than before the ECOC.

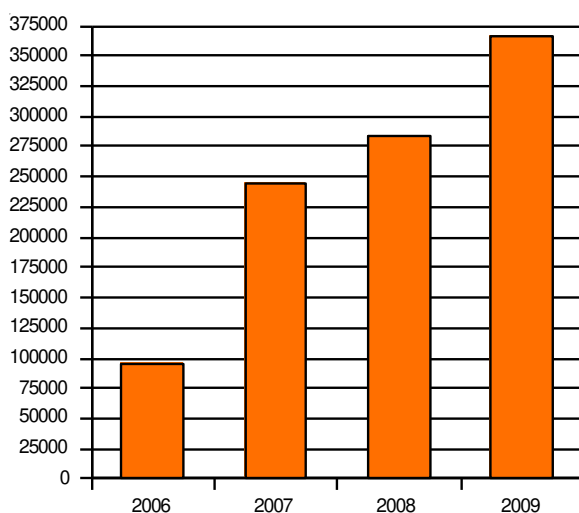
*Image of Liverpool, Luxemburg and Sibiu as cultural destinations in ATLAS surveys in Europe*



### Cultural impacts

The ECOC has given a substantial boost to the cultural sector in the city. Cultural visitation not only increased in 2007, but has continued to grow in the following years. Attendance at the major cultural attractions in the city has more than tripled since 2006.

*Attendance at the major attractions in Sibiu*



According to Corneliu Bucur, Director of the ASTRA museum, the ECOC led to a boom in visitor numbers, which led to the museum introducing an extended visiting programme, with visits between 10.00 and 3.00. Special lighting was installed to allow nighttime visitation. Growth in visitation to the Brukenthal Muzeum continued in both 2008 and 2009. This seems to indicate that the ECOC had the effect of increasing awareness of Sibiu museums in the domestic tourism market. By 2009 the total number of visits to the main museums in the city had reached almost 700,000.

### *Visits to museums in Sibiu, 2009*

<b>Museum</b>	<b>Visitor numbers 2009</b>
Muzeul National Brukenthal	366410
CNM ASTRA	297190
Icons on glass Museum , Sibiel	12730
<b>TOTAL</b>	<b>676330</b>

The internationalization of Sibiu museums has continued, with an exhibition of works from the collection of the Brukenthal Museum in Paris from September 2009 to January 2010 attracting 200,000 visitors. The exchange of works with Paris has undoubtedly strengthened the attractiveness of the museum offer in Sibiu.

Nationally, museum visits dropped by 20 per cent in 2009 compared to 2008 and cinema attendance has fallen by 17 per cent. Theatre attendance has dropped by 15 per cent compared to 2008. This contrasts with the picture in Sibiu, where cultural attendances continued to rise in 2009.

In contrast to the increase in visits to the major attractions, the post ECOC period has seen a significant slowdown in cultural events. The boost given to the cultural calendar of the city by the ECOC was clear, with over 1400 events being staged. However, this momentum was not maintained in 2008, which saw less than 300 events. There has been some recovery in 2009, but in the current climate of public sector funding challenges it is unlikely that the city can maintain the levels of eventfulness seen in 2007.

### *Cultural events in Sibiu, 2007-2009*

	<b>2007</b>	<b>2008</b>	<b>2009</b>
<b>Month</b>	<b>Number of events</b>		
January	56	22	37
February	56	38	53
March	100	54	70
April	92	38	63
May	166	53	67
June	145	53	53
July	158	11	66
August	368	9	45
September	165	4	15
October	81	4	26
November	33	4	20
December	27	7	22
<b>Total</b>	<b>1447</b>	<b>297</b>	<b>537</b>



## Business impacts

As the stakeholder interviews indicate (see below), the ECOC had significant impacts on the economy of the city, both in 2007 and beyond. Figures on the turnover of the local economy in 2006 and 2007 show that there was an increase of almost 10% in 2007.

### *Economic impact of the ECOC – 2006 compared with 2007*

Turnover of the local economy	€ 2006	€ 2007	% increase
Cultural production and services	9,398,786	10,109,335	7.6
Hotels & Pensions	5,078,987	5,612,280	10.5
Restaurants & Bars	16,162,843	17,439,708	7.9
Tourist companies	3,118,924	3,546,216	13.7
Transport companies	24,210,094	26,848,994	10.9
Rental income	3,654,337	3,946,684	8
Total	61,623,971	67,503,217	9.5

Source: Nistor (2008)

The ECOC in 2007 also coincided with an increase in passengers to the airport of 50%. This rate of increase was also sustained in 2008.

### *Passengers and flights to Sibiu airport*

Year	Passengers	Fights
2006	73,103	3,820
2007	112,077	5,014
2008	165,057	5,995

## Impacts on major stakeholders

In order to gauge the impact of the event on the stakeholders in and around Sibiu, depth interviews were held with representatives of a number of major stakeholder groups.

Of these interviews, 48 were held in the City of Sibiu, 10 in the region around Sibiu, and 15 in the rest of Romania. The main interview groups were: travel agents and tour operators, banking and insurance, media, hotels and restaurants, businesses and tourism organizations. The interviews covered the main aspects of the perceptions of stakeholders regarding the ECOC and its impacts:

1. Opinions about the programme of Sibiu capital cultural 2007, its impact on the city and how the event was valorized, including long-term impacts.
2. How the respondent feels affected by the development of Sibiu as a “tourist destination”, how this affected their professional activity, personal life, image of the city, etc.
3. Perception of weaknesses of Sibiu as a destination: what improvements could be made
4. Level of personal involvement in the development of Sibiu as a tourist destination and willingness to be involved in future.

The analysis of the interviews was conducted using the main items in the interview schedule, and the responses were coded according to the sector and location of respondents.

### *Interview respondent coding*

Location	
Sibiu	S
Sibiu Region	A
Elsewhere in Romania	R
Sector	
Travel agents and tour operator	TA
Banking and insurance	B
Media	M
Business and other	C

The analysis of the interviews largely supported the quantitative survey findings, indicating that almost all stakeholders were positive about the results of the ECOC both in the short and long term. A number of key issues emerged from the interviews which were emphasized by almost all the different stakeholder groups.

### *Image of Sibiu*

There was a widespread feeling that the ECOC had put Sibiu on the map not just nationally but internationally as well. Typical remarks were:

Another positive aspect resulting from Sibiu European Cultural Capital Sibiu in 2007 is to increase visibility both nationally and internationally through cultural events of the highest class. SB

Our city has been promoted and created a very good image about it. I believe that around Sibiu has benefited from the programme and became known and it was appreciated more ST

The status of European Capital of Culture of Sibiu brought a positive international image. STA

The image impacts were not just external, but internal as well:

Of course Sibiu leave a good image because its history and medieval air that persist like, through the beauty of places, the hosts, etc., which has aroused the curiosity of many Europeans, bringing them here in 2007. I think this programme has been exploited bringing many benefits to residents of the town. I am of Sibiu and attended many events held in 2007 in Sibiu and organizers were pleasantly surprised by the seriousness and extraordinary ideas. AB

These kinds of remarks reflect the pride created by the improved image of the city (see below) as well as the increased involvement which many people felt as a result of 2007.

### *More tourism*

One of the most immediate impacts of the increased visibility of Sibiu was a greater flow of domestic and international tourists. As one interviewee commented there was

A significantly increased number of tourists from the country and abroad; SB

The tourism industry in Sibiu experienced:

A significantly increased number of tourists from the country and abroad. SB

This impact was felt not just in the city, but also in the surrounding region:

2007, was the best opportunity to show also the values and history. In Sibiu and around Sibiu also to find many things that draw in any way by tourists so that is still preserved a bit of tradition and the beautiful surroundings AB

I think this opportunity has been recovered fully, of brought many tourists, people of culture, both in the city of Sibiu, but also in its surroundings. Yes, the programme effects were fully felt, opening new horizons of rural tourism in the villages around Sibiu. AB

The impacts of tourism growth were felt not just during the ECOC, but also in 2008 and 2009:

The fact that tourists came to Sibiu in the following years (2008 and 2009) is due largely to the image that led home those who were visitors in 2007. SC

One of the reasons that Sibiu has attracted more foreign tourists is because the city has now been placed on the European and International tourism map, largely thanks to the impact of the

ECOC. The fact that Sibiu was nominated by Forbes Magazine as one of the top global destinations did not escape the interview respondents:

the former European cultural capital in 2007 is on the list of most attractive holiday destinations. STA

### *Economic impacts*

The growth of tourism stimulated the local economy, and the impacts were clear for all stakeholders.

this event registered benefits in many units: hotel, restaurants and stores, as sales have seen significant increases. SC

First, the fact that Sibiu was the cultural capital of Europe in 2007 meant the creation of my job, and I think that says it all. STA

In addition, the city economically benefited from attracting funds from the EU, external funding from other institutions, but also funding from the government for the development of Sibiu in the service sector: STA

The economic effects were felt directly in terms of increased turnover for local businesses, especially those related to tourism, but there was also evidence of considerable induced impacts from this expenditure, for example for the banks and other services in the city:

In my capacity as branch manager of a bank (our) Financial Institution has (seen) increased turnover and profit (for) companies working in the Horeca sector. SB

This reality, Sibiu tourist destination, has benefited professionally because many people in the sphere of national and international affairs have made deposits in November, having confidence that they will return soon to open a business in Sibiu. SB

The economic impacts were felt not just in terms of increased turnover for local businesses, but also through the increased investment in the city by public and private bodies.

Sibiu has benefited from domestic and international funds, which led to improve all living conditions, including the improvement of tourist offers and to provide a varied programme as cultural and artistic has attracted many tourists SB

### *Cultural and social impacts*

Many interviewees emphasized that the impacts of the ECOC were wider than just economic:

Sibiu European Cultural Capital had a strong impact in 2007 in all respects but especially socially, culturally and economic. SB

Sibiu-European Cultural Capital in 2007 was designed so as to provide opportunities for issues of inclusion and social cohesion, education, heritage tourism and urban regeneration at all levels. The programme puts culture at the heart of city life and looking into her inspiration for driving community forward. AB

In particular, the opportunities offered by the extensive cultural programme were appreciated by a large number of stakeholders:

The ECOC in 2007 as well as 2008 both gave the opportunity for me and other one thousand inhabitants of the town to watch shows and events culture that otherwise would not have been present in Sibiu (ex. Vienna Philharmonic). SB

I'm pleased with the cultural activities taking place in Sibiu. For example, Talia Hall, where concerts are held every Thursday. The summer is full of festivals, plays. SB

Cinema and theatre was the height in that period. The city grew as a cultural value, SB

is a cultural city where there were very many artistic events that have developed the cultural forming links with other cities and other important figures of world culture. SC

The fact that the ECOC highlighted the cultural diversity of the city was also seen as a positive factor:

It was a year when Sibiu presented Europe its cultural diversity, linguistic and religious and how this diversity still live on the German fortress foundation in the eleventh century. SB

### *Renovation*

One of the crucial elements in improving the image of the city was the renovation of the old town. This was a measure which was appreciated by a large number of stakeholders, not just for the tourism and economic impacts, but also because of the general improvement of the quality of life.

Very visible in the eyes of the people was the renovation historical centre which otherwise would not have happened very quickly. Both the historical centre and the renovation of an impressive number of monuments and cultural organization of the various events had a favorable effect on the town. ST

In 2005 and 2006, extensive renovation activities took place in Sibiu. They have changed the facades of buildings in Piata Mare, Piata Mica, street city, City Theater was renovated and they held the Youth Park redevelopment and Astra Park. SC

After renovations are completed, Sibiu has restored life ... or so it seems to me. ST

Because of this programme, authorities had to make a series of works including: rehabilitation of the historic center, renovation of major buildings in terms of travel, repair of city streets etc... ST

These investments had a significant impact not just on the city centre itself, but also in other parts of the region:

large investments in conservation, renovation and highlighting the historical centre, has attracted a number of investments that have led to the development of tourism, both in Sibiu and its surroundings. SB

### *Pride in the city*

The increased visibility of the city and the restoration of some of its most prestigious landmarks also clearly had an impact on the pride that the citizens of Sibiu felt in their city.

I developed a special sensitivity for everything you call "my city". The fact that Sibiu was named European Cultural Capital together with Luxembourg is a proud moment. Also, the image to make a potential cue ball in Romania. SB

We have to be proud that we are locals and try to make known Sibiu in Romania and abroad SB

Considering the fact that I was born in Sibiu city and is my soul I was proud that I was given a big chance of being recognized internationally. For me, Sibiu is a city with strong potential and we are proud, SB

Being from Sibiu was suddenly something to take pride in, especially as the city was recognized not just as national, but also European level. The fact that people from other parts of the world felt that Sibiu was worth visiting had an important role in stimulating local pride:

I read in a magazine, do not know exactly where, that Sibiu is one of Europe's top cities that deserve to be visited, for this we should be proud of our Sibiu SB

We saw in Cluj people wearing caps and shirts with the inscription "Sibiu - European Cultural Capital" and then I enjoyed it. SC

The appreciation from outside also increased the appreciation of locals for what their city had achieved:

as inhabitants of this town I am very impressed by how well developed in Sibiu. SB

I gained a sense of pride, a kind of: here as you can, you can do something good, something of quality, here we are appreciated SB

### *Transformation*

The renewed pride of the citizens of Sibiu was also a reflection of the fact that something significant had taken place that had transformed the city.

Sibiu has changed a lot lately, mostly due to the great event held in 2007 SB

I think BCR Sibiu experienced only benefit from the nominations because 2007 was an impetus that Sibiu was able to capitalize on the most, both culturally and in terms of growth but the visibility of Sibiu, the cultural location, tourism and not least economic SB

long term this programme has been transforming our city into a tourist magnet STA

The transformation of the city has had a number of broader impacts, culturally and socially as well as economically.

Sibiu, in these conditions provides more possibilities for young people who decide to stay in this city and not just young people. SC

a change of pace of life has become more intense, more concentrated, the streets become more crowded SC

In very basic terms, there was a feeling that Sibiu had become both more 'European' and cosmopolitan:

I noticed this year that the city is visited by tourists (Spanish, Italian), appears to be cosmopolitan city.

My personal life has changed in the sense that in my spare time walking on downtown Sibiu noticed different people from different corners of the world, SB

Not just the people coming to the city have changed, but stakeholders also feel that the city itself has gained a greater capacity to undertake major initiatives as well.

This programme helped the evolution of the organization of events and highlighted the organizational capabilities of companies in this area SC

### *Role of the Local Authority*

Many stakeholders emphasized the important role that the civic administration had played in the development and the success of the ECOC.

Locally, in my view local authorities were very much involved, have managed to attract funds and manage them as effectively all in the interests of the community and the city that was very visible in the eyes of the people was the renovation of the historical centre. SB

The 2007 event was very well managed by local authorities in Sibiu; AB

Much of the success of the event was attributed to the leadership given by the Local Authority, and particularly the Mayor:

I can say that I was involved in decisions that influenced Sibiu by the fact that I expressed my point of view in terms of choosing the mayor of the city. ST

I'm proud that Sibiu and we are a good and think about those who lead this city SB

Sibiu received significant funding from the Government, Minister of Culture and by funds from Germany, following the steps mayor Klaus Johannis. Many events took place in Sibiu ST

### *Sibiu and Romania*

A number of respondents emphasized that the ECOC was not just an advantage for Sibiu, but for the whole country. Because the ECOC took place at the time that Romania became a

member of the EU, it had the effect of putting Romania in the spotlight and helping to change the image of the country as a whole.

Also, the image of Sibiu can be a potential catalyst in Romania. Nobody talks about Sibiu without mentioning the country to which it belongs. SB

What has followed in this project was to improve national and especially international image of Sibiu, attracting visitors, improve social links. ST

Sibiu - European Capital of Culture 2007 is the most important cultural project in Romania. STA

I think Sibiu ECC 2007 event was a positive point for both city and for the whole country. I noticed that those who come to our office want to know first about Sibiu as ECOC and then find other information on Romania STA

I am sure that through this programme the European cultural, Romania has become more known. AB

The national impact of the ECOC was appreciated not just by respondents in Sibiu itself, but also those in other parts of the country, including Bucharest:

From my point of view, this programme was a great chance offered Sibiu and Romania default to show a new image, other than those known so far outside the borders. In the same time not be omitted many economic and cultural benefits, and here I refer to funds raised in the development of infrastructure, recovery objectives and increasing the sense of cultural belonging. RB

It was the best thing possible both for Sibiu and for Romania, as Sibiu has benefited not only from this programme but especially what concerns our tourism. RB

I am sure that through this programme the European cultural, Romania has become more known. AB

The improved image of Sibiu and Romania was contrasted by some respondents with the 'old' image of the country in other parts of Europe:

We must improve the image of the country as much time we can. I left with a bitter taste when I was last year at the Romanian Cultural Institute in Vienna, where I saw the pictures made by the Romans about the Romanians, who were only pictures with Gypsies and misery, so they promoted a very bad image about our country. SB

### *Remaining challenges*

Although the vast majority of stakeholders were positive about the impacts of the ECOC, they were also keenly aware that there remains much to be done to address the weaknesses of the city. One of the key points was the work that still needs to be done on the infrastructure of the city:

The main weakness that I think at this point is the poor infrastructure of Sibiu SB

Weaknesses in Sibiu as a tourist destination are especially the infrastructure system that needs improvement SC

A review of the more detailed comments indicates that the major infrastructure weaknesses relate specifically to roads and parking facilities.



I think one weakness of both the city of Sibiu and as a tourism destination are narrow streets making difficult traffic. Another problem would be lack of parking. SB

Other interviewees mentioned the need to improve the tourism and leisure product as well:

I think that Sibiu needs more means of entertainment such as an amusement park, several swimming pools, upgraded rear different sports, etc... think that Sibiu needs more means of entertainment such as an amusement park, several swimming pools, upgraded rear different sports, etc... SB

The changes produced by the ECOC were not always experienced as positive. A number of people mentioned the increase in prices, while others feared for the loss of the tranquil atmosphere of the city.

Prices were increased to terraces, bars, are prices for tourists, not locals. SB

I do not want to be promoted Sibiu as commercial city, but to keep the medieval spirit. It was not too much excitement among the population. To maintain a quiet spirit. SB

A potential area of improvement indicated by many respondents was the attitude of some citizens, who were felt not to be 'civilised' or polite enough to welcome visitors:

A weakness I would see that has not enough civilized people. SB

To contribute to improving the image of Sibiu, people should give more evidence of civilization. Unfortunately this is one of the most important things. ST

To be more civilized! Namely to be more civilized! ST

Other aspects of the city were also felt to detract from the otherwise positive image of the ECOC:

In the centre you can find a trash at every step ST

The problem with vagrants and beggars has to be solved, SB

Other, longer term problems were indicated by some respondents:

I think Sibiu has accumulated some debt in 2007 and this will mean higher taxes and fees for city residents. Prices are now related to nutrition, housing, rents are now compared with those not in the country, but those from abroad, in developed countries. STA

There were also some question marks about the balance of new developments in the city. Although stakeholders were generally pleased with the renovations made in the city centre, some felt that this contrasted with the relatively lack of improvements in other parts of the city.

#### *Overall assessment of the interviews*

In general, the picture that emerges from the depth interviews is that all stakeholder groups were very happy with the ECOC and its outcomes. The economic impacts and the growth in tourism were remarked upon by those in the tourism sector as well as other stakeholders.

It is also clear that the event had a significant impact on the image of the city. Residents of Sibiu were aware that Sibiu had become more widely known, and this made them feel more proud of

being from Sibiu. They felt that the city had made significant achievements in 2007, and attributed a significant part of this success to the leadership shown by the Municipality and the Mayor.

These feelings were echoed by respondents from outside Sibiu as well. Stakeholders in the Sibiu region in general felt that the region as a whole had benefitted from the ECOC, which reflects the evidence from the statistics on hotel supply and occupancy as well. Respondents in other parts of Romania were also positive about the effects of the ECOC, as they generally saw that the success of Sibiu had reflected on Romania as a whole.

## Sustainability

An important question regarding any ECOC is the extent to which the outcomes are sustainable over the longer term. Before the event the Sibiu 2007 association outlined the following long term benefits which were expected from the event:

- making the city a better place to live in, a more interesting place to visit, work and invest in
- extended infrastructure and renewed cultural facilities will improve the city's life
- better skilled artists and promoters will add momentum to the city's cultural life
- a positive change in the image of Sibiu/Hermannstadt and Romania

The results of our research indicate that all of these goals have been achieved to a greater or lesser extent.

The visitor interviews show conclusively that the image of the city has improved over time, and that this improvement has been sustained after 2007. The effect of the marketing activity in 2007 has been extended by continued media coverage for the city, for example by the listing in the Fortune ranking of top 10 places to visit.

The stakeholder interviews also reveal that many businesses benefited from the ECOC not only in 2007, but also in 2008 and (early) 2009. Many tourism businesses had increased custom in the post-ECOC period, although it is difficult to judge whether the economic crisis has now reduced many of these gains, or if an ECOC effect still remains three years on.

The broader impacts of the ECOC can also be seen in the enthusiasm of stakeholders outside Sibiu, many of whom are keen to emulate its success. Other cities in Romania are now following the Sibiu model, for example in considering becoming candidates for the ECOC in future.

## **To what extent did the ECOC meet its aims?**

The ultimate measure of success for any project is the extent to which it has been able to meet the aims set for it. If we look back to the original aims for Sibiu 2007, we can see that the most important aspirations were:

- Raising the profile and changing the image of the city
- Attracting more tourists
- Enhancing local pride
- Growing the local audience for culture

Reflecting on the results of the research with regard to these aims, it certainly seems that the city was able to meet all of these aims. The image of Sibiu improved, not only domestically but internationally, as a result of the ECOC. The visitor surveys indicated that those visiting Sibiu placed the city very high on their personal list of cultural cities to visit. Surveys conducted in other parts of Europe also indicated that Sibiu improved its ranking among the top European destinations in 2007 and afterwards. This impression was also strengthened by the listing of Sibiu by Forbes Magazine as one of the top places to visit.

There is no doubt that the ECOC attracted more tourists to the city in 2007. The number of visitors and overnights increased significantly in 2007, and levels of tourism activity generally remained high in 2008 and early 2009. The impact of the economic crisis has tended to obscure the positive effects of the ECOC from mid-2009 onwards, but there are still indications that general levels of tourism activity and expenditure remain above pre-ECOC levels. The ECOC was particularly effective as a means of attracting foreign visitors, as overnights by foreign tourists increased substantially, and spend by foreign tourists contributed to the significant economic impact of the event. The years after 2007 also saw a significant increase in repeat visitation from those visitors who had been to the city during 2007, which shows that there was a long-term impact on tourism. The development of new hotels in the city also indicates that there has been a structural change in the tourism industry in Sibiu as a result of the ECOC, with greater capacity, higher quality facilities and therefore greater turnover for the HORECA sector.

The surveys of local residents and depth interviews with stakeholders confirm that there has been a significant boost to local pride and sense of identity as a result of the ECOC. Local people were proud that the city had been elected Cultural Capital, but also that the event had been so successful. The large number of tourists coming to the city was also significant, as this had boosted the cosmopolitan nature of the city and the feeling that the city had something to show the rest of the world.

The events in 2007 clearly strengthened cultural consumption in the city. The sheer weight of events was sufficient to ensure a high level of participation on the part of the local population, but there is also evidence to suggest that this has continued since 2007. This is in spite of the fact that the number of cultural events declined significantly in 2007, which suggests that interest in culture in general was awakened by the ECOC. One of the major challenges for the city will now be to live up to the expectations it has created among residents and visitors in the area of cultural production and consumption.

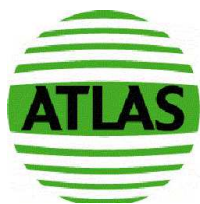
An overall conclusion, based on close observation of the city and nearly 10 years of survey research is that the ECOC in 2007 was the first time that Sibiu had developed a clear (cultural) tourism product. To meet the challenges of developing this new product, the Municipality needs to create a Destination Marketing Organization that can develop cultural tourism, business travel and events in order to effectively utilize the vastly increased accommodation supply and cultural and leisure facilities of the city and the surrounding region.

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# Appendices

## Appendix 1: Survey questionnaire 2007



### Sibiu Cultural Capital 2007 Visitor Survey

#### 1. Where do you live?

- ☐ Sibiu (go to question 9)
- ☐ Elsewhere in Transylvania
- ☐ Elsewhere in Romania
- ☐ Abroad (country)\_\_\_\_\_

#### 2. What is the main reason for your visit to Sibiu?

- ☐ to come to this attraction/event
- ☐ shopping
- ☐ business
- ☐ visiting friends/family
- ☐ day trip
- ☐ holiday
- ☐ cultural visit

#### 3. Have you visited Sibiu before?

- ☐ yes, many times
- ☐ yes, once or twice
- ☐ No, never (go to question 4)

If **yes**, did you visit Sibiu in 2007 (Cultural Capital Year)?

- ☐ yes
- ☐ no

Did you visit any of the Cultural Capital 2007 events?

- ☐ yes
- ☐ no

Do you think Sibiu has improved since your last visit?

- ☐ yes
- ☐ no

#### 4. Where are you staying at the moment?

- ☐ own home (→go to Q. \*\*)
- ☐ hotel
- ☐ camp site
- ☐ self catering accommodation
- ☐ guest house
- ☐ youth hostel
- ☐ with family or friends
- ☐ bed and breakfast

#### 5. Which region are you staying in?

- ☐ Sibiu
- ☐ Sibiu region
- ☐ elsewhere in Transylvania
- ☐ elsewhere in Romania
- ☐ abroad

#### 6. How many nights will you stay in this accommodation?

---

**7. How did you arrange your trip?**

- ☐ All-inclusive package  
☐ Travel and accommodation booked separately  
☐ Nothing booked in advance

**If you made a travel or accommodation booking, did you**

- ☐ Book in person at travel agency  
☐ Book via Internet  
☐ Book directly (by phone, fax or email)

**Office use only**

Interviewer: \_\_\_\_\_ Date \_\_\_\_\_

Location: \_\_\_\_\_

**8. Which information sources did you use to plan your trip?**

- |  |  |
|--|--|
| <input type="checkbox"/> previous visit  | <input type="checkbox"/> Sibiu brochure          |
| <input type="checkbox"/> family, friends | <input type="checkbox"/> newspaper/magazine      |
| <input type="checkbox"/> TV/radio        | <input type="checkbox"/> tour operator brochures |
| <input type="checkbox"/> tourist office  | <input type="checkbox"/> guide book              |
| <input type="checkbox"/> Sibiu website   |  |
| <input type="checkbox"/> Other website   |  |

**9. To what extent do you agree or disagree with the following statements?**

**(Please circle a number from 1 to 5)**

*This experience has increased my knowledge*

Disagree 1   2   3   4   5 Agree

*It was very relaxing being here*

Disagree 1   2   3   4   5 Agree

*There are lots of interesting things to see*

Disagree 1   2   3   4   5 Agree

*I like the atmosphere of this place*

Disagree 1   2   3   4   5 Agree

**10. Have you visited any of the following attractions in your leisure time in the past 12 months (except during holidays)?:**

- |                                     |                                       |  |
|-------------------------------------|---------------------------------------|--|
| <input type="checkbox"/> Museum     | <input type="checkbox"/> Opera        | <input type="checkbox"/> Film              |
| <input type="checkbox"/> Theme park | <input type="checkbox"/> Sports match | <input type="checkbox"/> Pop concert       |
| <input type="checkbox"/> Theatre    | <input type="checkbox"/> Musical      | <input type="checkbox"/> Cultural festival |

**11. Have you visited any other attractions in Sibiu today, or are you planning to do so?**

- |  |   |
|--|---|
| <input type="checkbox"/> Thalia Hall                     | <input type="checkbox"/> National Theatre Radu Stanca |
| <input type="checkbox"/> Bruckenthal Museum              | <input type="checkbox"/> ASTRA Museum                 |
| <input type="checkbox"/> Evangelic Church                | <input type="checkbox"/> Orthodox Cathedral           |
| <input type="checkbox"/> The Lower town                  | <input type="checkbox"/> The Fortifications           |
| <input type="checkbox"/> Fortified churches around Sibiu |   |
| <input type="checkbox"/> NONE of these                   |   |

**12. Could you give the quality of your visit to this attraction/event a score out of 10?** -----

**13. Can you give Sibiu as a tourist destination a mark out of 10?** -----

**14. How would you describe the type of holiday that you usually take ? (please indicate ONE type)**

- |  |  |
|--|--|
| <input type="checkbox"/> sun/beach holiday | <input type="checkbox"/> countryside recreation  |
| <input type="checkbox"/> touring holiday   | <input type="checkbox"/> mountain recreation     |
| <input type="checkbox"/> city break        | <input type="checkbox"/> health/sport orientated |
| <input type="checkbox"/> cultural holiday  |  |

**15. Please tick from the following list the FIVE cities which you think are most suitable for a cultural holiday**

- |                                     |                                    |   |
|-------------------------------------|------------------------------------|---|
| <input type="checkbox"/> Amsterdam  | <input type="checkbox"/> Glasgow   | <input type="checkbox"/> Paris                |
| <input type="checkbox"/> Athens     | <input type="checkbox"/> Helsinki  | <input type="checkbox"/> Pécs                 |
| <input type="checkbox"/> Barcelona  | <input type="checkbox"/> Istanbul  | <input type="checkbox"/> Prague               |
| <input type="checkbox"/> Belgrade   | <input type="checkbox"/> Linz      | <input type="checkbox"/> Riga                 |
| <input type="checkbox"/> Berlin     | <input type="checkbox"/> Lisbon    | <input type="checkbox"/> Rome                 |
| <input type="checkbox"/> Brussels   | <input type="checkbox"/> Liverpool | <input type="checkbox"/> Rotterdam            |
| <input type="checkbox"/> Budapest   | <input type="checkbox"/> London    | <input type="checkbox"/> Sibiu/<br>Hermanstad |
| <input type="checkbox"/> Copenhagen | <input type="checkbox"/> Luxemburg | <input type="checkbox"/> Stockholm            |
| <input type="checkbox"/> Dublin     | <input type="checkbox"/> Madrid    | <input type="checkbox"/> Venice               |
| <input type="checkbox"/> Edinburgh  | <input type="checkbox"/> Moscow    | <input type="checkbox"/> Vienna               |
| <input type="checkbox"/> Florence   | <input type="checkbox"/> Oporto    | <input type="checkbox"/> Warsaw               |

**16. Can you indicate how far you associate the following terms with Sibiu?**

- |                         |                                  |                                 |                                     |
|-------------------------|----------------------------------|---------------------------------|-------------------------------------|
| international           | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| culture and art         | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| friendly                | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| European city           | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| multi-cultural          | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| shopping                | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| working city            | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| unsafe                  | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| nightlife               | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| dynamic                 | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| historic city           | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |
| something for everybody | <input type="checkbox"/> totally | <input type="checkbox"/> partly | <input type="checkbox"/> not at all |



spectacular events ☐ totally ☐ partly ☐ not at all

**17. Do you think that the European Capital of Culture:**

Improved the image of Sibiu? ☐ yes ☐ no ☐ don't know  
Brought more money to Sibiu? ☐ yes ☐ no ☐ don't know  
Improved cultural facilities? ☐ yes ☐ no ☐ don't know  
Created more social cohesion? ☐ yes ☐ no ☐ don't know  
Improved the quality of life? ☐ yes ☐ no ☐ don't know  
Brought Sibiu closer to the rest of Europe?  
☐ yes ☐ no ☐ don't know

**18. Do you think there is more attention for Sibiu in the national media as a result of the European Capital of Culture?**

☐ yes ☐ no ☐ don't know

**19. Do you think there is more attention for Sibiu in the international media as a result of the European Capital of Culture?**

☐ yes ☐ no ☐ don't know

**20. Overall, do you think Sibiu made good use of the opportunity of being European Capital of Culture in 2007?**

☐ yes ☐ no ☐ don't know

**Your Background**

**21. How many people are there in your party, including yourself?**

adults \_\_\_\_\_ children \_\_\_\_\_

**22. Are you** ☐ male ☐ female

**23. Please indicate your age group?**

☐ 15 or younger ☐ 20-29 ☐ 40-49 ☐ 60 or over  
☐ 16-19 ☐ 30-39 ☐ 50-59

**24. What is your highest level of educational qualification?**

☐ primary school ☐ secondary school  
☐ further education ☐ Higher education (first degree)  
☐ postgraduate

**25. Which of the following categories best describes your current position?**

☐ employee ☐ houseman/wife or carer  
☐ self employed ☐ retired  
☐ student ☐ unemployed

**Please indicate your current (or former) occupational group**

- ☐ Director or manager
- ☐ Professional (doctor, lawyer, teacher, etc)
- ☐ Technical professions (technicians, nursing)
- ☐ Clerical/administration
- ☐ Service and sales personnel
- ☐ Manual or crafts worker

**26. Is your occupation or study connected with culture?**

- ☐ yes ☐ no

**27. Can you indicate how much you have spent (or will spend) during your visit to Sibiu/this attraction?**

€

travel -----

admission -----

food and drink -----

shopping/other -----

accommodation -----

Total

-----

--

**28. Which category best describes your annual household gross income?**

- |   |  |
|---|--|
| <input type="checkbox"/> 5,000 Euro or less | <input type="checkbox"/> 30,001-40,000 Euro    |
| <input type="checkbox"/> 5,001-10,000 Euro  | <input type="checkbox"/> 40,001-50,000 Euro    |
| <input type="checkbox"/> 10,001-20,000 Euro | <input type="checkbox"/> 50,001-60,000 Euro    |
| <input type="checkbox"/> 20,001-30,000 Euro | <input type="checkbox"/> More than 60,000 Euro |

**Remarks:**

## Appendix 2: Tourism capacity in 2009 Sibiu County

Types units	Classified		Inventory (total tourist)				% of unclassified		Sample of Statistics		% of estimation ("unknown")			
	Number of units	Capacity	Number of units	% Of total units	Capacity	% Of total capacity	% of unclassified units	% of unclassified capacity	Number of units	Capacity	% of uncoun ted units col. 6 v 12	% of uncoun ted capacity col. 8 v 13		
1	2	4	6	7	8	9	10	11	12	13	14	15	16	17
Apartments for rent	1	2	18	3,5%	117	0,9%	94.44	98.29					in touristic boarding houses	
Challets	11	464	36	7,0%	1,173	9,1%	69.44	39.45	11	396	69.44	66.34	Touristic Chalets	
Rooms for rent	14	152	17	3,3%	176	1,4%	17.65	13.64					in touristic boarding houses	
Camping	2	120	2	0,4%	120	0,9%	-	-	1	120	50.00	-	Camping	
Hostel	8	389	18	3,5%	984	7,6%	55.56	60.47	3	147	83.33	85.06	Hostels	
Hotel	32	3,107	39	7,5%	3,584	27,8%	17.95	13.31	28	2,473	28.21	31.10	Hotels	
Motel	7	257	8	1,5%	281	2,2%	12.50	8.54	7	197	12.50	29.89	Motels	
Touristic Pensions	69	1,218	124	23,9%	2,144	16,6%	44.35	43.19	32	580	74.19	72.95	Touristic boarding houses (pensions)	
Rural Tourist Pension	125	1,865	159	30,7%	2,332	18,1%	21.38	20.03	74	1,135	53.46	51.33	Agro-tourist boarding houses (pension)	
Tourist town Pensions	61	1,173	66	12,7%	1,278	9,9%	7.58	8.22					in touristic boarding houses	
Villas	5	236	31	6,0%	704	5,5%	83.87	66.48	6	263	80.65	62.64	Touristic Villas	
pupils camps									7	590		100.00	School and pre-school camps	
maisonette									3	112		100.00	Touristic houselet-type units (casute)	
<b>TOTAL</b>	<b>335</b>	<b>8,983</b>	<b>518</b>	<b>100%</b>	<b>12,893</b>	<b>100%</b>	<b>35.33</b>	<b>30.33</b>	<b>172</b>	<b>6013</b>	<b>66.80</b>	<b>53.36</b>		

Hotel statistics present considerable problems of analysis, because of different categorizations and a lack of coverage of certain types of accommodation. The Master plan for tourism in Sibiu County presented in November 2009 by Marketscope shows that Sibiu County has a total of 518 accommodation units, of which most are rural tourist pensions (159), followed by general category of pensions (124) and the urban tourist pensions (66).

<b>Sibiu County: synthesis parameters of accommodation capacity</b>								
<b>BY TYPE OF UNIT, CLASSIFICATION OR AS ASSUMED BY THE UNITS</b>								
Types units	Classified <sup>[1]</sup>				Inventory (total tourist)			
	Number of units	% Of total units	Capacity (capacity)	% Of total capacity	Number of units	% Of total units	Capacity (capacity)	% Of total capacity
Apartments for rent	1	0.3%	2	0.02%	18	3.5%	117	0.9%
	11	3.3%	464	5.2%	36	7.0%	1,173	9.1%
Rooms for rent	14	4.2%	152	1.7%	17	3.3%	176	1.4%
Camping	2	0.6%	120	1.3%	2	0.4%	120	0.9%
Hostel	8	2.4%	389	4.3%	18	3.5%	984	7.6%
Hotel	32	9.5%	3,107	34.6%	39	7.5%	3,584	27.8%
Motel	7	2.1%	257	2.9%	8	1.5%	281	2.2%
Pensions	69	20.6%	1,218	13.6%	124	23.9%	2,144	16.6%
Rural Tourist Pension	125	37.3%	1,865	20.8%	159	30.7%	2,332	18.1%
ourist town Pensions	61	18.2%	1,173	13.0%	66	12.7%	1,278	9.9%
Villas	5	1.5%	236	2.6%	31	6.0%	704	5.5%
<b>TOTAL</b>	<b>335</b>	<b>100%</b>	<b>8,983</b>	<b>100%</b>	<b>518</b>	<b>100%</b>	<b>12,893</b>	<b>100%</b>
<b>BY LEVEL OF CONFORT, CLASSIFICATION OR AS ASSUMED BY THE UNITS</b>								
Levels of comfort	Classified				Inventory (total tourist)			
	Number of units	% Of total units	Capacity (capacity)	% Of total capacity	Number of units	% Of total units	Capacity (capacity)	% Of total capacity
Without category					65	12.5%	1,745	13.5%
1 flower / star	16	4.8%	593	6.6%	21	4.0%	673	5.2%
2 flowers / stars	171	50.7%	3,459	38.5%	213	40.9%	4,081	31.7%
3 flowers / stars	121	35.9%	3,088	34.4%	179	34.3%	4,334	33.6%
4 flowers / stars	25	7.4%	1,481	16.5%	38	7.3%	1,674	13.0%
5 flowers / stars	4	1.2%	362	4.0%	5	1.0%	386	3.0%
<b>TOTAL</b>	<b>337</b>	<b>100</b>	<b>8,983</b>	<b>100</b>	<b>521</b>	<b>100</b>	<b>12,893</b>	<b>100</b>

In respect of accommodation available, rural tourist pensions account for less than one fifth of the total (18%) and hotels account for approximately 28%. But pensions have almost half the total volume of accommodation available in the county (44.6%).

<sup>1</sup> <sup>[1]</sup> [www.turism.gov.ro](http://www.turism.gov.ro) For this category of information was used list of tourist with accommodation published by the Ministry of Tourism in October 2009 (the "Other" of the website [www.turism.gov.ro](http://www.turism.gov.ro) - <http://www.turism.gov.ro/ro/download/34>), enhanced with data from research office (ignoring duplicates, updating accommodation capacities, the removal units have been confirmed that no longer works). This is why where there is some difference between the total of accommodation units and used in comparison with other counties in southern Transylvania (Figure 4) and the data included in Annex 2 of the Master plan (used in analysis).

### Accommodation

	Sibiu County	Sibiu County
Types units	Number of units	Capacity (places)
Hotels	28	2473
Hostels	3	147
Motels	7	197
Touristic Villas	6	263
Touristic Chalets	11	396
Touristic boarding houses (pensions)	32	580
Agro-tourist boarding houses (pension)	74	1135
Camping	1	120
School and pre-school camps	7	590
Touristic houselet-type units (casute)	3	112
Total	172	6013

<b>Sibiu City: Summary of parameters accommodation capacity</b>						
BY TYPE OF UNIT, OR AS ASSUMED BY THE UNITS						
Types units	Classified			Inventory (total tourist)		
	Number of units	Capacity (capacity)	% Of total capacity	Number of units	Capacity (capacity)	% Of total capacity
Apartments for rent	1	2	0.1%	18	117	2.5%
Rooms for rent	10	108	2.9%	12	125	2.7%
Hostel	4	134	3.5%	9	229	5.0%
Hotel	20	2,021	53.4%	24	2,363	51.5%
Motel	1	58	1.5%	1	58	1.3%
Pensions	20	418	11.0%	30	626	13.7%
Rural Tourist Pensions	2	35	0.9%	2	35	0.8%
Tourist town Pensions	50	1,009	26.7%	51	1,017	22.2%
Villas	0	0	0%	1	14	0.3%
TOTAL	108	3,785	100%	148	4,584	100%
BY LEVEL OF CONFORT, CLASSIFICATION OR AS ASSUMED BY THE UNITS						
Levels of comfort	Classified			Inventory (total tourist)		
	Number of units	Capacity (capacity)	% Of total capacity	Number of units	Capacity (capacity)	% Of total capacity
Without category				11	159	3.5%
1 flower / star	6	199	5.3%	7	209	4.6%
2 flowers / stars	38	1,035	27.3%	42	1,124	24.5%
3 flowers / stars	53	1,425	37.7%	73	1,932	42.1%
4 flowers / stars	9	864	22.8%	13	898	19.6%
5 flowers / stars	2	262	6.9%	2	262	5.7%
TOTAL	108	3,785	100%	148	4,584	100%

Hostels and camp sites are not counted either by the Directia Judeteana de Statistica Sibiu's monthly report or the Institutul National de Statistica. The data as presented in Annex 2 of the Master plan also show that some of the listed units are excluded from the statistics, as

accommodation units of less than 5 bedspaces were not taken into account by official statistics and from January 2009 all units with less than 10 places were excluded.

Comparing the data from available sources the differences are significant

	2005	2006	2006	2007	2007	2009	2009	2009	2009
	statistics	statistics	licensed	statistics	licensed	statistics	AJTS	licensed	inventory
<b>total county</b>									
units	111	120	273	137	359	172	481	335	518
rooms			2315		3057		5039	3335	5417
places			7399		6352	6013	12083	8983	12893
average places/room			3.20		2.08		2.40	2.69	24.89
average places/unit			27.10		17.69		25.12	26.81	24.89
<b>sibiu town</b>									
units			62		82		162	108	148
rooms			1029		1321		2284		2284
places			3756		2453		4633	3785	4584
average places/room			3.65		1.86		2.03		2.01
average places/unit			60.58		29.91		28.60	35.05	30.97
<b>around sibiu</b>									
units			170		221		189	no data	189
rooms			852		1305		1289		2284
places			2199		2487		3919		4663
average places/room			2.58		1.91		3.04		
<b>sibiu and sourroundings</b>									
units			232		303		351	no data	
rooms			1881		2626		3573		4568
places			5955		4940		8552		9247
<b>other locations</b>									
units			41		56		130	no data	
rooms			434		431		1466		849
places			1444		1412		3531		3646
<b>% of sibiu in county</b>									
units			44.45		43.21			0.00	440.93
places			50.76		38.62			42.14	35.55

Comments:

The surroundings of Sibiu have reacted sooner as the town and the growth was in 2007 but the town in 2008

We have included as Sibiu surroundings the villages and towns in 30 km far from the town.

First notice is that these areas have a large number of units, of small capacity (most of them pensions) that practically double the capacity of the town. Field researches have shown that the prices in this area are much lower than in Sibiu and their clients have choose them as a reason of price but also as offer, living in a village purvey another type of holyday that can the added to town visit.

According to the Tourism Ministry data we have had in 2006 in the county 2315 rooms with 7399 places (3,2 places / unit) and in 2007 3056 rooms with 9130 places (2,99 places / unit) and 4354 units with 11882 places (2,96 places / unit) that is unacceptable and a real research must be organized to clear this situation.

The town had 1029 units with 3756 places (3, 65 places / unit) in 2006, 1322 units with 4493 places (3,4 places / unit) in 2007 and 2062 units with 6106 places (2,96 places / unit) in 2009. That means an increase in 2007 comparing with 2006 of 32% as units and 23,4 as places that is for 2009 comparing with 2006 100% as units and 69% as places. In spite of brand hotels in Sibiu the small units have grew faster and has satisfy the market for tourist category that is also shown by the decrease of percentage of tourist staying at relatives comparing with 2002 – 2005 when the offer was mainly of hotels with high prices.

Field research has shown that there is no politics of small owners for future or market studies. Almost of them just took advantage of the situation and some of them have developed their own site. Almost of them just put their contact on Mayor House site. Trying on Google or Yahoo for accommodation form Sibiu, that is the faster and trustfully connection. Many just relayed on month to month promotion. Many of these establishments need a professional check and the owners need a special training.

The most surprising findings are about the influence that the town has in the surrounding areas. These areas has in 2006 852 units with 2199 places, in 2007 have arrived at 1106 units with 2828 places and in 2009 at 1948 units with 4363 places that means an increase of 116% and 98,4%. Together, the town and what we call surrounding areas have 3904 units with 19469 places that are 89,5% or 88,1 of the county. Sibiu is only 47,4% that is 51,4%.

Sibiu has by contrary 53,3% of overnights and the agro pensions 11,6% that allow us to say that the town has generated flows in the neighborhood more that in the town and we have to take into consideration this area when planning

These means that the town has generated more places round Sibiu

Building an offer for Sibiu must take into account the surroundings as quantity but as completing the offer too.

### Appendix 3: Tourist flows in 2009 Sibiu County and town

The tourist arrivals and overnights for the whole county in 2009 as per official statistics are:

Arrivals	2009											
	ian.	feb.	mar.	apr.	mai	iun.	iul.	aug.	sep.	oct.	nov.	dec.***
Total county	13200	12891	15472	15237	24198	24217	25002	29652	21621	23408	20945	14366
From which												
Hotels	9796	9521	11711	10523	17251	16079	15441	19061	14816	18067	15965	9302
Motels	810	729	722	625	1382	1709	1918	1819	986	1097	872	768
Touristic Villas	269	427	560	882	1047	1062	952	1239	1278	1091	1322	298
Touristic Chalets	446	269	396	266	454	690	1168	1424	1053	528	610	509
Touristic boarding houses (pensions)	698	619	1150	1153	1562	1604	1535	1571	1227	1062	919	1391
Agro-tourist boarding houses (pension)	991	1085	739	1496	1778	2001	2835	3222	1963	1392	1083	1787

\*) Urban pensions were redefined as touristic pensions

\*\*) Rural pensions were redefined as agro touristic

\*\*\* estimated

Overnights	2009											
	ian.	feb.	mar.	apr.	mai	iun.	iul.	aug.	sep.	oct.	nov.	dec.**
Total county	19825	18516	22841	24272	37141	38159	45164	47598	36924	32165	29420	23950
From which												
Hotels	13756	12547	15560	14930	22817	21214	21559	24886	22878	22808	20088	12987
Motels	946	893	932	1076	1832	1886	2390	2117	1208	1383	1146	985
Touristic Villas	487	750	1689	1731	3515	3400	3897	3076	2930	2512	2766	1571
Touristic Chalets	623	381	565	363	670	1792	3339	3007	1456	816	875	1288
Touristic boarding houses (pensions)	1296	1172	1909	2075	3770	3055	2939	2575	2827	1675	1809	2000
Agro-tourist boarding houses (pension)	2527	2110	1906	3656	3582	4455	5718	6289	4732	2780	2552	4129

number

\*) Pensuniile urbane s-au redefinit ca pensiuni turistice

\*\*) Pensuniile rurale s-au redefinit ca pensiuni agroturistice

\*\*\* estimated

These figures indicate a total of 375975 overnights in Sibiu County in 2009. We can also add to these figures the approximate number of visitors staying with friends and relatives, who are not recorded in the accommodation statistics. In 2009 about 31% of visitors indicated that they had stayed with friends and relatives. This would indicate a total tourist volume of around 492500 overnights in 2009.



Official tourist flows for Sibiu

	SIBIU TOWN											
	2007						2008					
month	arrival			overnights			arrival			overnights		
	total	Romanian	foreigners	total	Romanian	foreigners	total	Romanian	foreigners	total	Romanian	foreigners
1	8422	5979	2443	15055	10687	4368	8299	6321	1978	11772	8559	3213
2	9853	7509	2344	15937	11308	4629	9961	7681	2280	13978	10356	3622
3	12087	9209	2878	20105	14393	5712	10431	7975	2456	13936	10396	3540
4	12682	7849	4833	21171	12912	8259	11172	7516	3656	15302	9457	5845
5	15693	8643	7050	27350	13753	13597	16806	10801	6005	24727	15582	9145
6	16808	9026	7782	27255	13826	13429	12541	8180	4361	18179	11474	6705
7	20143	10745	9398	30530	15683	14847	12840	8168	4672	19227	12192	7035
8	20293	9294	10999	29848	13001	16847	14689	8734	5955	20064	12212	7852
9	17622	9188	8434	27508	13492	14016	16150	8930	7220	21617	11866	9751
10	17832	11342	6490	26867	16414	10453	14560	10282	4278	19124	13403	5721
11	14936	10739	4197	22582	15660	6922	12103	9637	2466	16367	13258	3109
12	12161	9575	2586	16785	12694	4091	7448	5510	1938	9712	7320	2392
year	178532	109098	69434	280993	163823	117170	147000	99735	47265	204005	136075	67930

	2009						2007	2008	2009	2007	2008	2009
month	arrival			overnights			medium overnight					
	total	Romanian	foreigners	total	Romanian	foreigners	total			foreigners		
1	6571	4804	1767	8729	6488	2241	1.79	1.42	1.33	1.79	1.62	1.27
2	5891	3808	2083	7768	5195	2573	1.62	1.40	1.32	1.97	1.59	1.24
3	8844	6133	2711	11754	8300	3454	1.66	1.34	1.33	1.98	1.44	1.27
4	7747	4863	2884	10591	6657	3934	1.67	1.37	1.37	1.71	1.60	1.36
5	13399	8500	4899	18660	12082	6578	1.74	1.47	1.39	1.93	1.52	1.34
6	13302	8216	5086	17479	10964	6515	1.62	1.45	1.31	1.73	1.54	1.28

7	11923	7246	4677	16701	10805	5896	1.52	1.50	1.40	1.58	1.51	1.26
8	13806	7541	6265	18122	9967	8155	1.47	1.37	1.31	1.53	1.32	1.30
9	10886	5979	4907	16514	10025	6489	1.56	1.34	1.52	1.66	1.35	1.32
10	10941	7366	3575	14273	9754	4519	1.51	1.31	1.30	1.61	1.34	1.26
11	8923	7072	1851	12046	9720	2326	1.51	1.35	1.35	1.65	1.26	1.26
12	8140	6716	1424	11644	9688	1956	1.38	1.30	1.43	1.58	1.23	1.37
year	120373	78244	42129	164281	109645	54636	1.57	1.39		1.69	1.44	

	2009						2007	2008	2009	2007	2008	2009
month	arrival			overnights			medium overnight					
	total	Romanian	foreigners	total	Romanian	foreigners	total			foreigners		
1	6571	4804	1767	8729	6488	2241	1.79	1.42	1.33	1.79	1.62	1.27
2	5891	3808	2083	7768	5195	2573	1.62	1.40	1.32	1.97	1.59	1.24
3	8844	6133	2711	11754	8300	3454	1.66	1.34	1.33	1.98	1.44	1.27
4	7747	4863	2884	10591	6657	3934	1.67	1.37	1.37	1.71	1.60	1.36
5	13399	8500	4899	18660	12082	6578	1.74	1.47	1.39	1.93	1.52	1.34
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8	13806	7541	6265	18122	9967	8155	1.47	1.37	1.31	1.53	1.32	1.30
9	10886	5979	4907	16514	10025	6489	1.56	1.34	1.52	1.66	1.35	1.32
10	10941	7366	3575	14273	9754	4519	1.51	1.31	1.30	1.61	1.34	1.26
11	8923	7072	1851	12046	9720	2326	1.51	1.35	1.35	1.65	1.26	1.26
12	8140	6716	1424	11644	9688	1956	1.38	1.30	1.43	1.58	1.23	1.37
year	120373	78244	42129	164281	109645	54636	1.57	1.39	1.36	1.69	1.44	1.30

NOTE: medium overnight is that calculated with the figures as registrated at reception desk of licensed units. The length of journey in our questionnaires means the total time of a journey not only in Sibiu. We have to notice that the length of the whole journey as stated by field research is 6-10 days. Statistical figures show an overnight of only 1.3 -1.5 nights. That might show that Sibiu is only a stop for the journey but in the same time might indicate a certain grey activity for particular areas.

These are the official figures of Sibiu Direction for Statistics. They are calculated using a sample of the licensed touristic units. For any estimations or decision based on them it must be taken into consideration the composition of this sample. Because of ECC the sample for Sibiu is larger than those for other counties as stated by officials from Sibiu Direction for Statistics. The land coverage of the sample is also of high importance for detailed conclusions. It is very expensive to use detailed data from this source as the search and sort programs are specific and cannot be converted and the only way is to be analyzed into the Direction by its staff. For foreigners as arrivals and overnights there is a detailed statistics on origin by countries. Data might be sort by months, by location, by type of accommodation etc. But the composition of the sample must be taken into consideration. Such an analyze might be a base for any marketing plan or for deciding where to focus the promotion campaigns. It might cost some time and money to have a dynamic evolution for a couple of years to see the trends. The same for Romanian. **But for both situations these data show no qualitative info as: motivation, source of information, tourist consumption etc. Field researches are compulsory, or better a mix.**

An important change of the tourist season has occurred since 1990: the change of seasonality for hotels of high category. Until 1990 all hotels were full starting April until October because of mass tourism and groups arrived by couches. Off season (the only foreigners were the Soviet groups that were on their way to their relatives on Hungary, Czechoslovakia or GDR) started November up to March. Now the brands have off season in summer and they are in high season in spring and autumn because of events organized in Sibiu mainly by Romanian or global companies located in Romania. Further investigation are required to analyze into this direction

#### Special NOTE:

There are no available data about the turnover of tourism industry in the town. No statistics are available. Direct observation has shown up that the restaurants are well developed in the town and in the neighborhoods. They are not serving the people but also contribute to the animation of the areas they are located. During January 2007 the students of ATLAS Winter University have pointed out that 84% of people getting in or out of the main Square were looking down that is bed for tourists as general ambiance. The large numbers of terraces downtown have changed the situation mainly during spring - autumn time. More, direct observations have noted that locals are more and more eating in town that means changing the habits. This summer restaurants owners have declared an increase of meals.

As per souvenirs selling etc. there is no info so no advice can be professional offered.

The only field researches were carried out by in 2007 by ATLAS and the Romanian Ministry of Culture, and this follow up survey. An estimation of the tourism economy according to TSA or based on direct observation seems to become compulsory.

A special research and plan must be drowning up for a synergic development of events (conferences, business, coaching etc.) tourism and cultural events. The town should enlarge the offer including 2-4 hours trips in neighborhoods (Cristian – Sibiel / Cisnadioara – Sadu I) connected to local events and put them into the events' program either for having dinner or lunch during the event. Special program might be done for before or after events trips. Brands should be involved deeply.

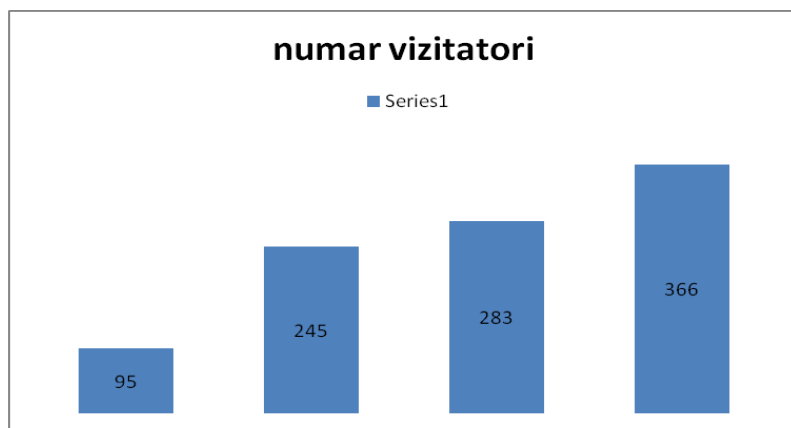
It seems that tourism in Sibiu should start working for leisure. For the time being there is no inventory of leisure activities carried on in Sibiu as well as for activities connected to tourism a: restaurants, bars, repairing damaged things, do it yourself activities, sport, etc. etc. Researches are in progress with master student of the faculty for Economic Studies of ULBS

## Appendix 4: events and visits statistics

Visitors in museums tsd

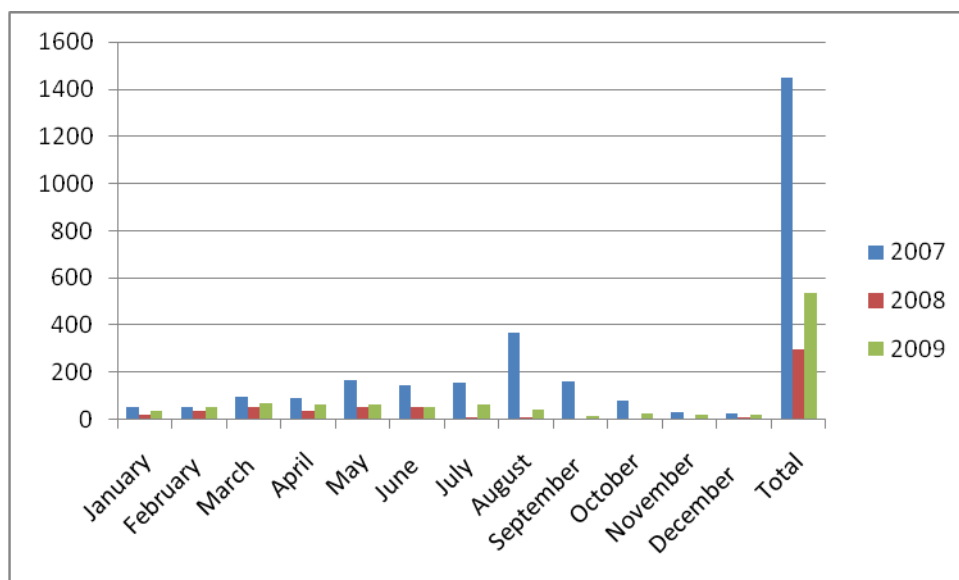
Brukenthal Muzeu

2006	95
2007	245
2008	283
2009	366



Name of the muzeu	Nr. vizitatori 2009
Museum National Brukenthal	366410
CNM ASTRA	297190
Museum de icon on glass, Sibiel	12730
TOTAL	676330

Events no	2007	2008	2009
January	56	22	37
February	56	38	53
March	100	54	70
April	92	38	63
May	166	53	67
June	145	53	53
July	158	11	66
August	368	9	45
September	165	4	15
October	81	4	26
November	33	4	20
December	27	7	22
Total	1447	297	537



#### Comments:

1. Starting 2007 the mayor House has approached the tourism industry as a partner. He has got into details: during 2007 the Sibiu 2007 ECC has to provide logistics for events and a special department was organized. Once its activity closed an office for tourism was organized just into the Mayor House and several people were charged to carry on the promotion activities for Sibiu image and to boost tourism arrivals. Till now their main activity was for international tourism even if domestic arrivals are 65% according to official statistic figures. A further step was made when decided to draw up a marketing plan for tourism activities in Sibiu. The tourism clerks have had many contacts with local touristic suppliers. But the tourism office is not paying the role of a DMO and in spite of several local tourism associations and similar<sup>2</sup> there is no frame for working together and an extensive exchange of information. Brief there is no organized cooperation, no common goals to achieve and few exchange of information except participation to exhibitions. Plans for this matter are in progress and must be carried on. Local actors must be involved into decision process in order to cluster the synergies.
2. as a result of the work of this department we have given up to analyze the typology of events according to criteria used for ECOC 2007 or others. A proposal for future might group them into 4 categories: A type: that ones that bring national and international image benefits and during their deployment the number of tourism has increased; such events generate a large press reaction during and after event (that means more tourists and image as that is animation for). Type B: bring national and international image benefits and lead to the growth of cultural vitality of the town as well as to its cultural animation (that is more images). Type C: assure the cultural vitality of the town and its cultural animation as well (that is animation) and Type D: assure the cultural vitality of the town and might be the nursery for future projects, projects that should grow to the other types as soon as experience was achieved. Another proposal might be to group them as: 1. image 2. tourists 3. animation and leisure for local people – bring no money 4. nursery 5. to give away list, after looking to their involved budget. Also a particular attention for the events distribution all long the year according to the need for image, tourists and local peace under the olives
3. this Report has not analyzed the public funding for events and their budget. Such analyze should include the results of ECOC survey

<sup>2</sup> See <http://www.infotravelromania.ro/asociatii.html>