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# **Ten Years of Cultural Development in Sibiu: The European Cultural Capital and Beyond**

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The Association for Tourism and Leisure Education (ATLAS),  
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**Ten Years of Cultural Development in Sibiu:  
The European Cultural Capital and Beyond**

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

**Greg Richards  
Ilie Rotariu**

**May 2011**

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# Ten Years of Cultural Development in Sibiu: The European Cultural Capital and Beyond

A Report to the City of Sibiu / Hermannstadt

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## **Background to the study**

This study presents the results of a ten year monitoring programme on cultural and tourism development in the city of Sibiu. The programme was initiated by Ilie Rotariu and his colleagues from the Lucian Blaga University in 2001. Over the ten year research period the programme expanded to cover a wide range of data sources, including resident and visitor surveys, stakeholder interviews and secondary statistical data.

The research started at a fairly low level with studies of single events in the cultural agenda of Sibiu. The programme was significantly expanded in 2007 thanks to the staging of the European Capital of Culture in the city. Support from the ECOC allowed the scale of the research to be increased. Since 2007 the Lucian Blaga University has continued to collect data using its own resources.

This study is unique as it is probably the first long-term study of the cultural and tourism development of a city in a former Socialist country in Central and Eastern Europe. The data in the current report build on and extend the analysis provided in the earlier report “The Impact of the 2007 European Cultural Capital in Sibiu: A long term perspective”, published in 2010.

# Ten Years of Cultural Development in Sibiu: The European Cultural Capital and Beyond

## A Report to the City of Sibiu / Hermannstadt

Cities build culture, and culture builds cities. This basic understanding has been vital in the revitalization of an increasing number of cities across Europe in recent years.

The Romanian city of Sibiu (or Hermannstadt in German) is a medium sized city in the Transylvania region. In common with cities elsewhere in Central and Eastern Europe it has undergone considerable transformation since the restoration of democracy. Industrial restructuring caused unemployment growth and infrastructure was in need of renovation. In tackling these problems the city adopted a somewhat radical strategy compared to its regional neighbours, by making cultural development a spearhead in the transformation of the city.

Sibiu has a long history of staging cultural events, and was a major centre for the counterculture during the Ceausescu era. But the event that really re-launched Sibiu as a major cultural hub in Romania was the European Capital of Culture staged in 2007. This was the first European Capital of Culture (ECOC) to be held in one of the post-2004 EU accession countries, and it represented a major challenge in being organised just as Romania was joining the EU. This bold move reflected the new-found confidence of the city with the establishment of a new political coalition under Mayor Klaus Johannis, the first German Mayor of a Romanian city since World War Two.

This urban 'regime' (Oanca, 2010) aimed to stimulate economic development through public-private partnership and by raising the international profile of the city to attract inward investment. The German links of the Mayor's party ensured that capital began to flow into the city, and the cultural links with Luxemburg won the city the ECOC title for 2007.

The main aims of the ECOC in 2007 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 in the post-ECOC period. 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.

In this report we look back over ten years of data collection and analysis to assess the effectiveness of Sibiu's cultural and tourism development strategy.

## Methodology

The backbone of the research programme is provided by surveys of residents and visitors to Sibiu, conducted at regular intervals over the 10 years between 2001 and 2010. The initial surveys were conducted by the “Lucian Blaga” University in the framework of the ATLAS Cultural Tourism Research Project ([www.tram-research.com/atlas](http://www.tram-research.com/atlas)).

In the first phase of the research programme, attention was paid to established events in the cultural calendar of the city, such as the Theatre Festival, the Jazz Festival and the ASTRA documentary film festival. When Sibiu was awarded the European Capital of Culture title in 2004, a new data collection strategy was designed with a specific emphasis on the impact of this singular cultural event. 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).

In total, almost 5000 surveys of residents and visitors have been completed over the period 2001-2010.

### *Sibiu Surveys 2001 – 2010*

	2001	2004	2005	2007	2008	2009	2010
Events surveyed	Theatre Festival/ Jazz Festival	ASTRA		ECOC			
May				279	88	579	399
August/September				413	193	500	173
October				426	230	337	
December						122	217
Total	346	236	357	1118	511	1538	789

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. The main survey locations included the main square, the main street and Balcescu street, as well as a range of cultural attractions and facilities in the city. Foreign visitors were slightly more likely than other respondents to be encountered in the main square.

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

In most cultural programmes, the most important segment of the audience is local residents. Not only are they numerically more important, but events such as the the ECOC are specifically designed to cater for the needs of citizens. In the case of Sibiu, however, tourism has also been particularly important, since Romania was being opened up the EU and because the ECOC in 2007 represented a unique opportunity to develop an image for Sibiu internationally.

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, in terms of the visitor profile (as demonstrated in this section of the report), high levels of visitor satisfaction and a new events policy (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 and in 2009 and 2010 the proportions of men and woman were more or less equal. This to some extent reflects the shift in the types of events surveyed from fairly specialist to more general cultural events.

### *Gender distribution of visitors 2001-2010*

%	2001	2004	2005	2007	2008	2009	2010
Male	41,6	39,1	46,7	49,3	60,5	51,6	49,3
Female	58,4	60,1	53,3	50,7	39,5	48,4	50,7

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

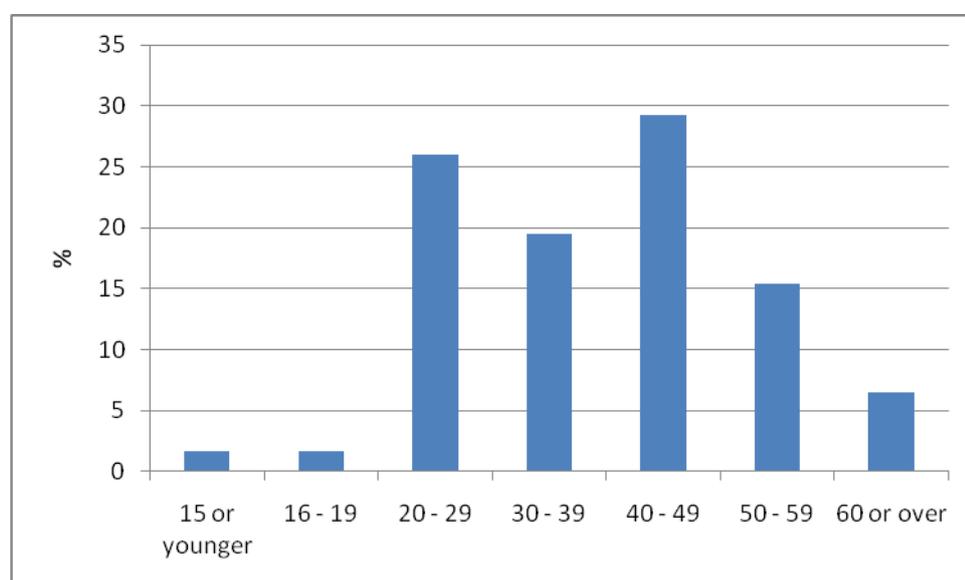
The age distribution of participants in cultural events in Sibiu also reflects general European patterns. The largest single age group is consistently 20-29, although visitors over the age of 40 have also gained ground over the years. This may be an indication that Sibiu has developed a more varied cultural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

### Age distribution of visitors 2001-2010

%	2001	2004	2005	2007	2008	2009	2010
15 or younger	2,6	0	0	1	2	1	2
16 - 19	17,4	9,8	8	8	8	5	5
20 - 29	52,0	76,6	45	50	35	38	39
30 - 39	13,1	8,1	28	24	25	28	24
40 - 49	9,9	1,7	13	10	17	16	19
50 - 59	3,2	2,6	5	4	9	7	8
60 or over	1,7	1,3	1	3	4	5	7

Foreign visitors tended to cluster in the 20-29 and 40-49 age groups in 2010, with these two categories accounting for over half of the foreign tourists.

### Age distribution of foreign visitors, 2010



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 2010. 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. This level is also higher than the average for Europe as a whole, as revealed by the ATLAS surveys of cultural tourists in different European countries (70%).

### Highest education level (%)

	2001	2004	2005	2007	2008	2009	2010
Primary school	4	0	0	0	10	2	2
Secondary school	12	8	3	4	8	8	7
Vocational education	41	27	20	11	20	16	17
Bachelor degree	30	55	66	16	40	58	53
Master or Doctoral degree	13	10	10	68	22	15	21

The education level of foreign visitors tended to be higher than that of Romanian visitors. In 2010, almost 85% of foreign visitors had some form of higher education qualification.

*Education level of foreign visitors, 2010*

	%
Primary school	2,4
Secondary school	5,7
Vocational education	7,3
Bachelor degree	64,2
Master or Doctoral degree	20,3

Over time the occupational profile of visitors also tends to be high, with a peak of 77% having a managerial or professional occupation during the ECOC in 2007.

*Occupational profile (%)*

	2001	2004	2005	2007	2008	2009	2010
Director or Manager	9,4	18,8	16	16	12	13	14
Professional (doctor, lawyer, teacher, etc)	36,7	36,3	25	33	26	25	23
Technical profession (technicians, nursing)	14,3	12,5	20	28	17	20	20
Clerical/ Administration	8,7	18,8	23	9	20	18	15
Service and sales personnel	24,1	6,3	12	11	16	20	23
Manual and crafts worker	6,6	7,5	4	3	9	6	5

Foreign visitors were even more likely to have managerial or professional backgrounds than Romanian visitors, with almost 60% belonging to these categories in 2010. This matches the high levels of educational attainment.

*Occupational profile of foreign visitors, 2010*

	%
Director or Manager	23
Professional (doctor, lawyer, teacher, etc)	35
Technical profession (technicians, nursing)	21
Clerical/ Administration	7
Service and sales personnel	10
Manual and crafts worker	4

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. Comparison with ATLAS data indicates that Sibiu tends to attract more visitors with a cultural occupation than the average European city (around 30%).

The proportion of visitors with a cultural occupation has varied over the years. In general, cultural visitors were much more likely to have a cultural occupation in the years before and after the ECOC than in the ECOC year itself. The ECOC may therefore have broadened the cultural audience, with a higher proportion of visitors from outside the cultural sector. The proportion of the audience with an occupational link with culture has generally been lower in the post-ECOC period than it was in 2001 and 2004, when the cultural events surveyed were much more specialised.

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

	2001	2004	2005	2007	2008	2009	2010
Yes	42,0	58,5	25,9	23,9	41,7	33,5	32.8

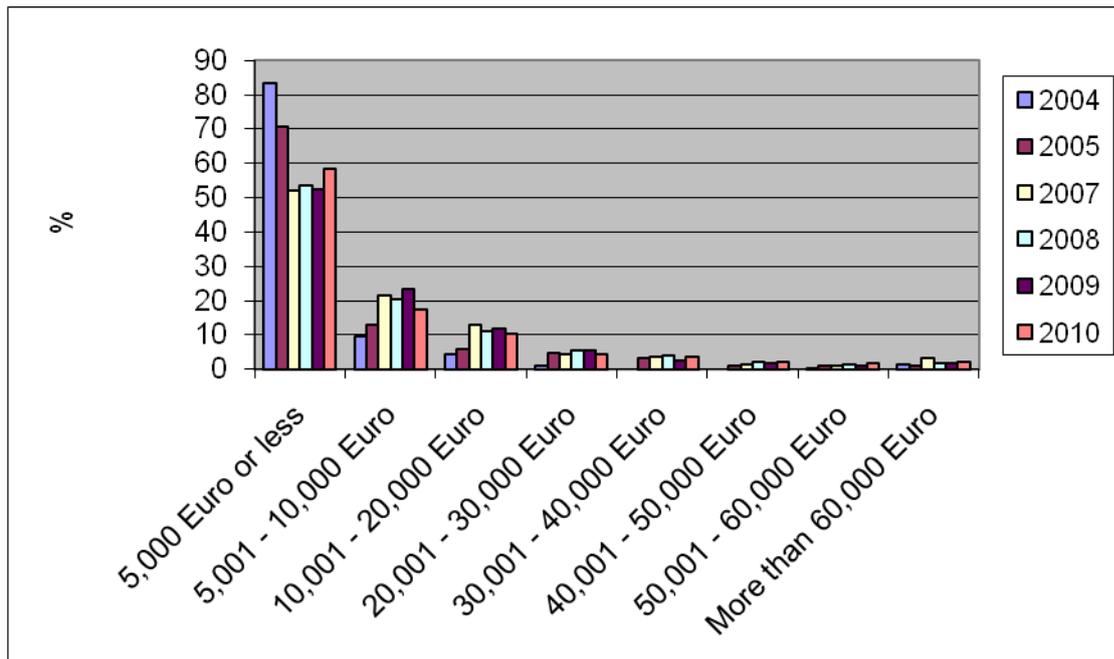
When we look at the cultural occupations by visitor origin, we can see that in 2007 the ECOC attracted a high proportion of cultural sector visitors from abroad, underlining the international cultural appeal of the event. By 2009, however, the level of cultural occupations among local residents and other 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 %	2010 %
Sibiu	18	33	35
Elsewhere in Transylvania	24	34	29
Elsewhere in Romania	24	38	33
Abroad	38	31	29
Total	24	34	33

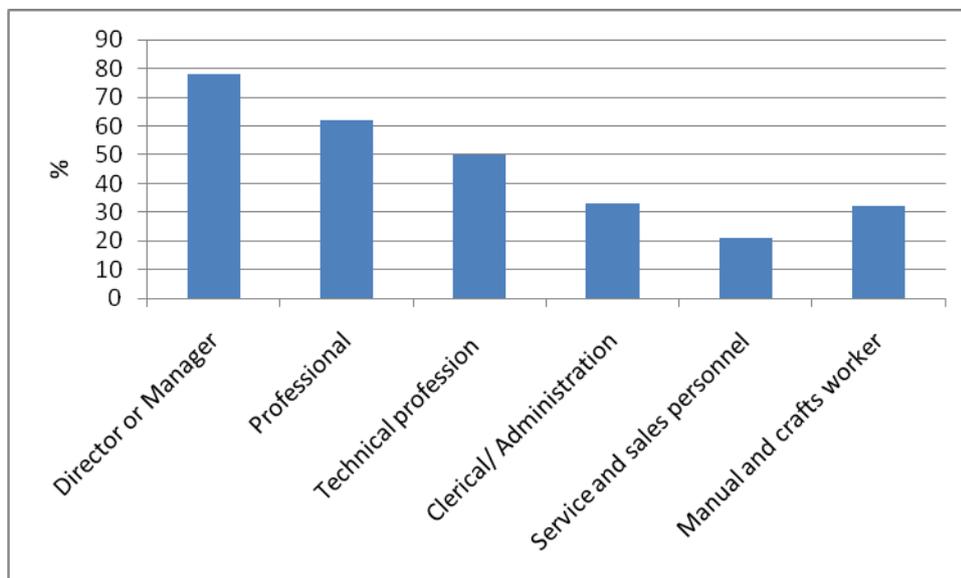
In line with the high education levels and occupation profiles of participants, their incomes also tend to be relatively high for Romania. Average household income in Romania was just over 6000 euros in 2010, compared with an average of around 7500 euros for all respondents in 2010. It is also notable 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. In 2010 there were signs of a slight decrease in average income levels, which probably reflects the impact of the global economic crisis.

### Average household income levels 2001-2010



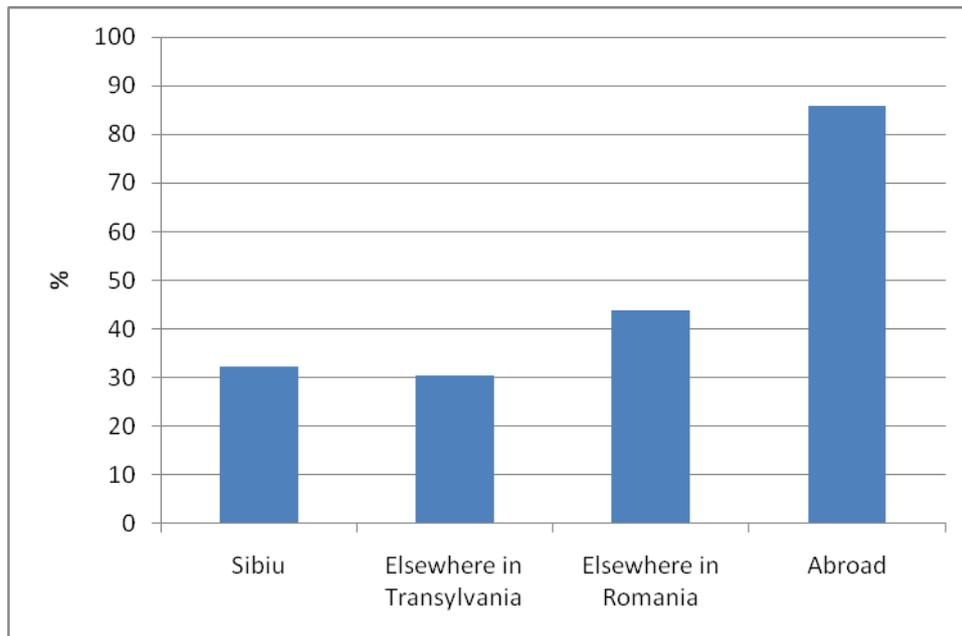
Occupational profile has a strong influence on household income. Almost 80% of those in managerial positions had an income of over €5000, compared with just over 20% of service personnel.

### Visitors with incomes over €5000 by occupation 2010



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 2010*



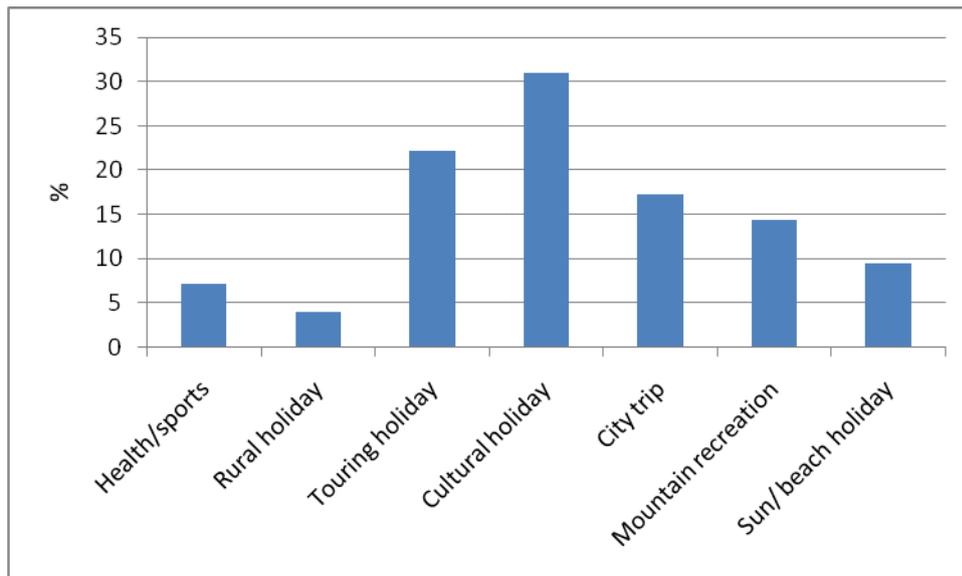
Perhaps not surprisingly, the type of holiday most frequently taken by respondents is sun and beach holidays. Mountain recreation is also popular, reflecting the location of Sibiu. More surprising is the fact that visitors indicating that they normally take cultural holidays has declined since 2007. This may reflect the fact that Sibiu has become a destination with wider tourist appeal for a general, rather than a specialist market.

*Usual holiday type (%)*

	2007	2008	2009	2010
Health/sports	2.9	13.9	5.1	4.8
Rural holiday	6.8	6.1	7.1	9.8
Touring holiday	15	18.2	13.7	14.4
Cultural holiday	16.5	19	11.1	12.7
City trip	16.9	9.9	15.2	17.0
Mountain recreation	21.3	13.5	18.1	20.5
Sun/ beach holiday	23.5	21.6	28.8	22.4

For foreign visitors, cultural holidays and touring holidays were particularly important. Over 30% of foreign visitors indicated that they were on a cultural holiday in 2010 compared with 23% in 2009, seeming to confirm the indications from earlier research that Sibiu is increasingly important as a cultural tourism destination for foreign visitors.

### *Holiday type for foreign visitors, 2010*

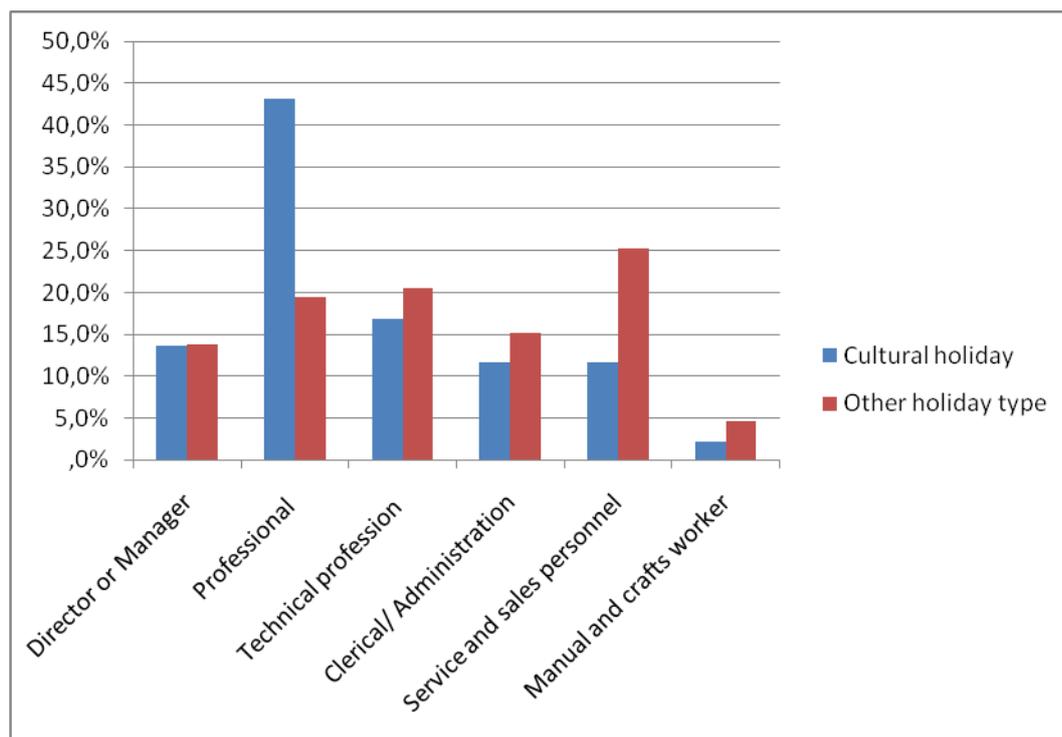


In general, those taking cultural holidays are older than those on city breaks. This fits the image of the classic cultural tourist, and indicates that a 'city break' is perhaps a more fashionable product for younger people (particularly young couples). Those usually taking cultural holidays tended more often to be female than other visitors. Again, this reflects the patterns usually found in other research on cultural tourism.

The origin of visitors interviewed in Sibiu has fluctuated over the past 10 years. The ECOC in 2007 produced a record influx of tourists, both nationally and from abroad. Since the ECOC Sibiu has generally been able to maintain the relatively high proportion of foreign visitors in the tourist profile (although with a marked dip in 2009).

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

### Occupational profile of visitors by cultural holiday 2010



In terms of area of residence, the largest single group of visitors is drawn from Sibiu itself, which accounted for 40% respondents in 2010. This was a substantial drop compared with 2009, which mirrors the recovery in foreign tourism to the city. Over the monitoring period, significant changes have taken place in the origin of visitors to cultural events. Since 2007 in particular there has been an increase in the number of visitors coming from outside Sibiu, which has evidently helped to boost the economic impact of events as well as raising the profile of Sibiu in other parts of Romania and abroad.

### Visitor origin 2001-2010

	2001	2004	2005	2007	2008	2009	2010
Sibiu	54	38	53	38	37	49	40
Elsewhere in Transylvania			10	12	23	23	16
Elsewhere in Romania	34	37	34	34	22	23	27
Abroad	11	23	13	16	18	5	17

Among the foreign tourists interviewed, the most important source countries were Germany, Italy and France, which together accounted for two thirds of foreign visitors recorded in 2010. Germany in particular has grown in importance as a source market for visitors, reflecting the cultural ties with Sibiu. Comparison between the visitor profile obtained from the surveys and from official statistics based on accommodation arrivals indicates that our data largely reflect the distribution of foreign visitors in the city.

*Top origin countries for visitors to Sibiu, 2010*

	<b>% of total foreign visitors</b>	<b>According to official statistics</b>
Germany	40.2	31.7
Italy	8.9	7.6
France	8.9	6.0
Spain	5.3	7.2
United Kingdom	3,6	2.8
Austria	2,4	7.8
Greece	2,4	
United States	1,8	3.3
Belgium	1,2	1.6
Bulgaria	1,2	
Canada	1,2	
Israel		4.1
Hungary		3.1
Poland		2.6
Holland		1.9

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 in 2009 and 2010 over three quarters 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 may also be 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	2010
Yes	49,6	54,9	67,9	63,5	68,1	80,0	76,0
No	50,4	45,1	32,1	36,5	31,9	20,0	24,0

Much of the repeat visitation since 2007 has been related to the ECOC. The proportion of visitors who had been to the city in 2007 grew from 50% in 2008 to over 70% in 2009 and 2010. There is clearly a high degree of overlap between repeat visitation to the city and having visited the ECOC in 2007.

*Did you visit Sibiu in 2007?*

%	2008	2009	2010
yes	50	74	72
no	50	26	28

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 and 2010, adding considerably to the long-term impact of the event.

*Did you visit ECOC events in 2007?*

%	2008	2009	2010
yes	19,8	61,9	55,2
no	80,2	38,1	44,8

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.

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%, and in 2010 it was 49%.

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 2010*

Visitor origin	Previous visit?			Total
	Yes, many times	Yes, once or twice	No	
Elsewhere in Transylvania	69%	21%	10%	100,0%
Elsewhere in Romania	55%	30%	15%	100,0%
Abroad	29%	20%	51%	100,0%
Total	51%	25%	24%	100,0%

### **Visit Characteristics**

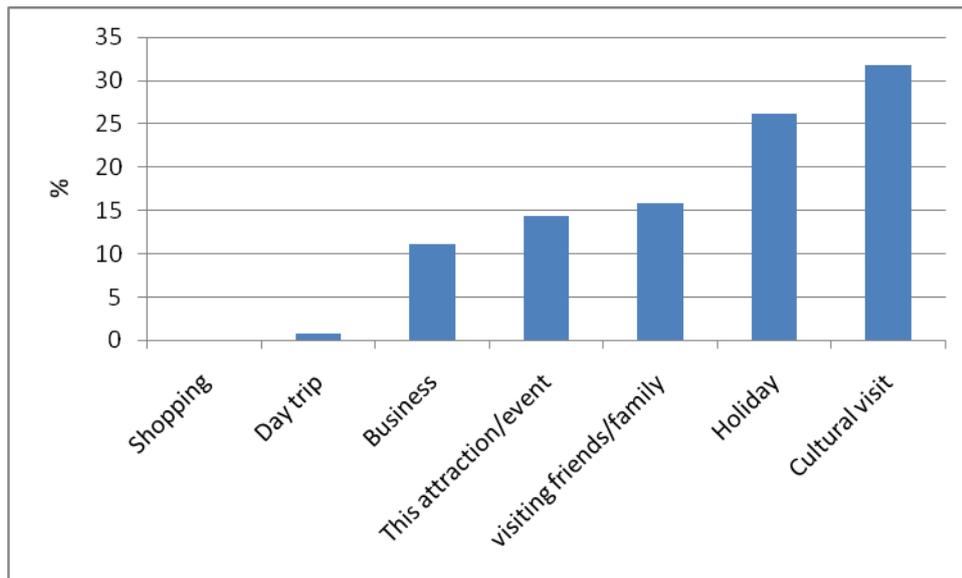
The reasons given by visitors for coming to Sibiu have shifted over the years. Because the 2004 data were collected at the ASTRA Festival, there was a very high level of visitors who were only coming to Sibiu for that particular event. This was also the case for a lot of visitors to the ECOG in 2007. 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 and 2010.

### *Purpose of visit 2004-2010 %*

	2004	2007	2008	2009	2010
Shopping		1	2	3	3
Business	9	6	23	14	11
to come to this attraction/event		9	22	12	13
Day trip		9	4	10	9
visiting friends/family	6	16	11	27	28
Cultural visit	80	17	19	20	18
Holiday	5	19	16	14	16
Cultural Capital		33			

Foreign visitors continue to be most likely to visit Sibiu for cultural reasons, The level of cultural motivation was virtually unchanged in 2010 compared with 2009 at over 31%. The proportion of foreign visitors coming to Sibiu for a holiday increased in 2010, while family visitors and day trips declined.

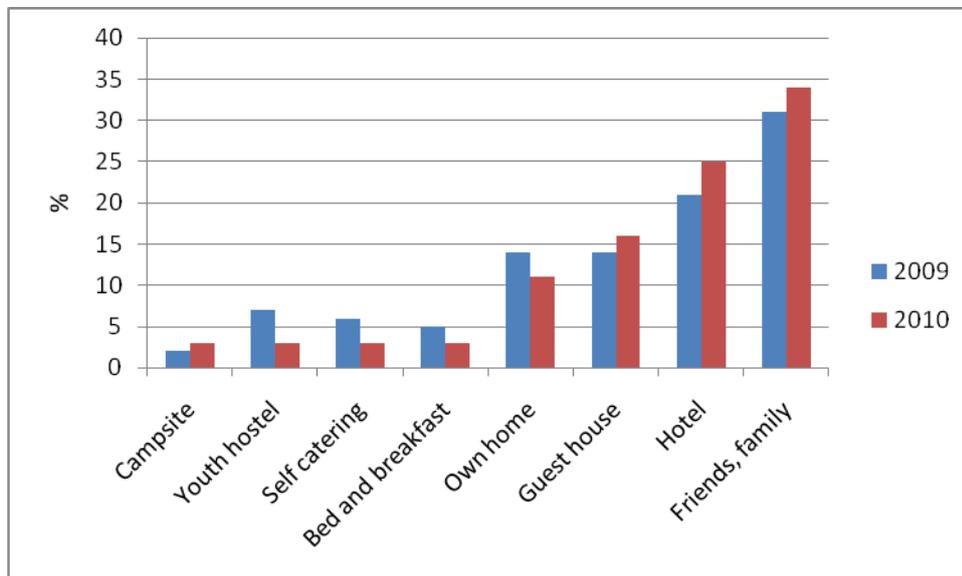
*Visit motivation for foreign visitors, 2010*



**Accommodation**

Over a third of overnight visitors stayed with friends and relatives in 2010, a slight increase on 2009, and a quarter stayed in hotels. The fall in the number of youth hostel guests was probably due to one of the city’s two hostels closing in 2010.

*Accommodation use (all visitors, 2009 and 2010)*



Over time, the proportion of visitors staying in hotels has remained fairly constant, although increased tourist numbers will mean that there are now many more hotel guests in absolute terms than in 2001. Sibiu displays a very interesting pattern with respect to hotel demand, with the ECOC having stimulated growth in hotel supply, which subsequently seems to have driving a growth in demand. This has also been noted at other recent ECOC events (Palmer, Richards and Dodd, 2011).

The proportion of visitors staying with friends and relatives or in their own home has increased in recent years, 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	2010
Campsite	5	5	1	4	2	3
Youth hostel	2	2	5	14	7	3
Own home	7	6	8	10	14	11
Guest house		0	10	7	14	16
Self catering	14	4	11	10	6	3
Bed and breakfast	13	2	15	7	5	3
Hotel	24	28	23	23	21	25
Friends, family	35	53	26	15	31	34
	100	100	100	100	100	100

For those staying in hotels, the most important visit motives were cultural visits and business trips in 2010.

#### *Visit motivation for hotel guests 2010*

Visit motivation	%
business	28
cultural visit	29
holiday	25
event	15
day trip	2
visiting friends and relatives	2
shopping	1

Average length of stay fell in 2010 compared with 2009, but the length of stay is still higher on average than that recorded in 2007.

#### *Nights away from home*

Mean nights	2001	2004	2005	2007	2008	2009	2010
Visitor origin							
Sibiu Region				6,1	12,1	10,5	8,3
Elsewhere in Romania			6,4	4,1	8,9	10,4	7,7
Abroad			10,0	6,7	9,9	7,9	6,6
Total	6,6	5,4	7,4	5,5	11,5	9,8	7,4

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	2010
Staying in Sibiu	69	76	72	74
Staying in Sibiu region	18	21	19	16
Staying in Transylvania	6	2	4	3
Staying elsewhere	5	1	3	5
Staying abroad	2	0	1	2
	100	100	100	100

For those visitors actually staying in Sibiu, the average length of total journey including Sibiu is slightly more than 9 nights. For hotel guests, the length of stay is much lower, at 5 nights.

#### **Information sources**

The main information sources for visitors in 2010 were family and friends and previous visits made to the city. This reflects the high proportion of repeat visitors, most of whom will have gathered information on Sibiu from earlier visits.

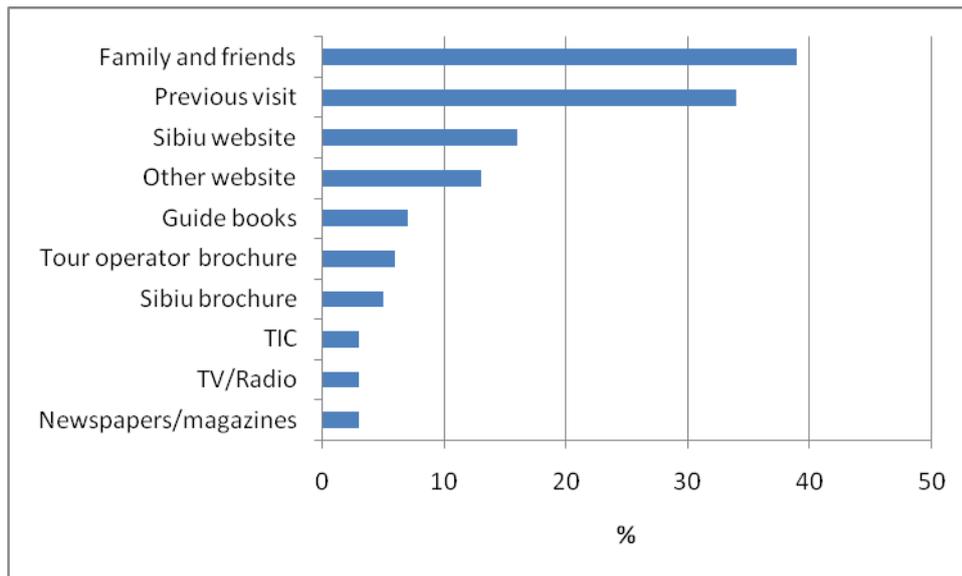
There has been a clear shift in the use of different information sources among visitors (including residents of Sibiu) since the ECOC in 2007. During 2007 extensive use was made of the Sibiu 2007 website and the specific promotional material produced for the ECOC, such as the programme brochure. In subsequent 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. Perhaps more of concern is the fact that the number of visitors obtaining information from the Tourist Information Centre in the city has consistently declined since 2007.

#### *Information sources used by all visitors 2007-2010*

	2007	2008	2009	2010
Previous visit	16,9	24	19	21,2
Family and friends	20,4	24	23	24,5
TV/Radio	12,5	4,6	4,3	2,3
TIC	15,5	5,5	3,8	2,5
Sibiu 2007 info point	5,6			
Sibiu website	30,3	23,2	7,7	10,3
Other website	21,3			8,2
Sibiu brochure	4,8	5,9	2,7	3,3
Newspapers/magazines	9,1	2,6	3,7	2,0
Tour operator brochure	3,5	4,2	2,6	3,5
Guide books	2,4	4,2	3,6	4,1

For tourists coming from outside Sibiu, after 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 and the level of use grew significantly in 2010 to 16%.

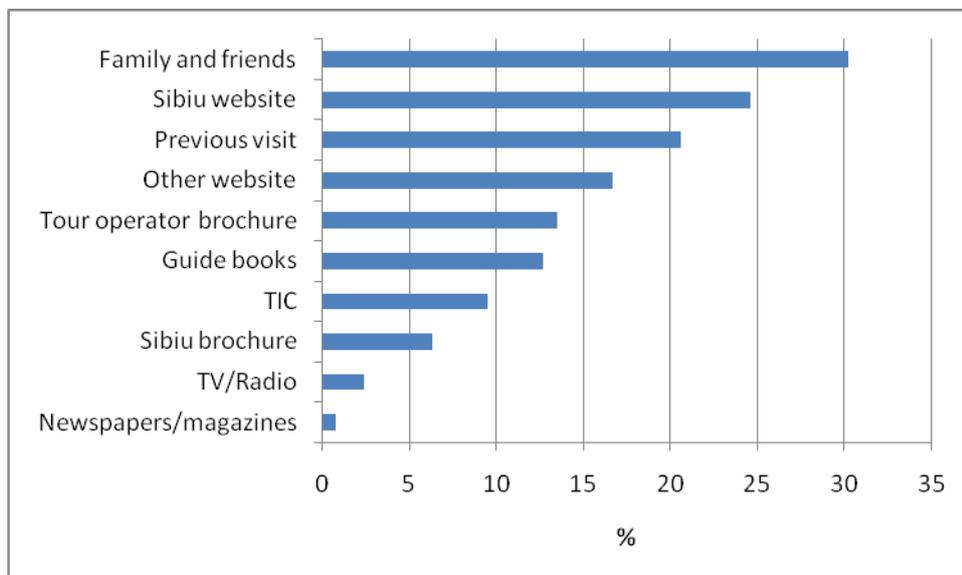
### Information sources consulted by visitors from outside Sibiu 2010



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.

For foreign visitors, family and friends and 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. Use of the Sibiu website also increased significantly to 25% in 2010, up from 16% in 2009.

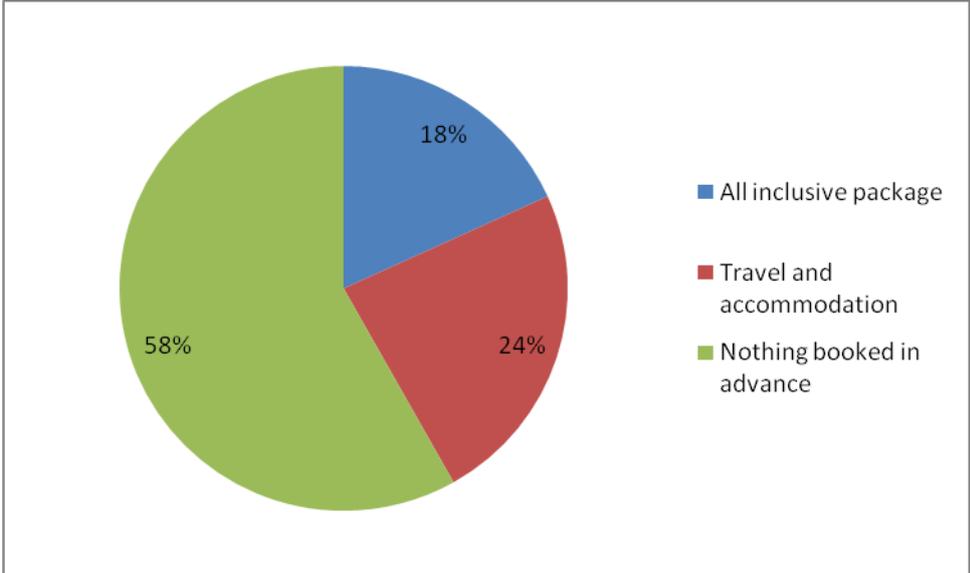
### Information sources for foreign tourists, 2010



### Booking channels

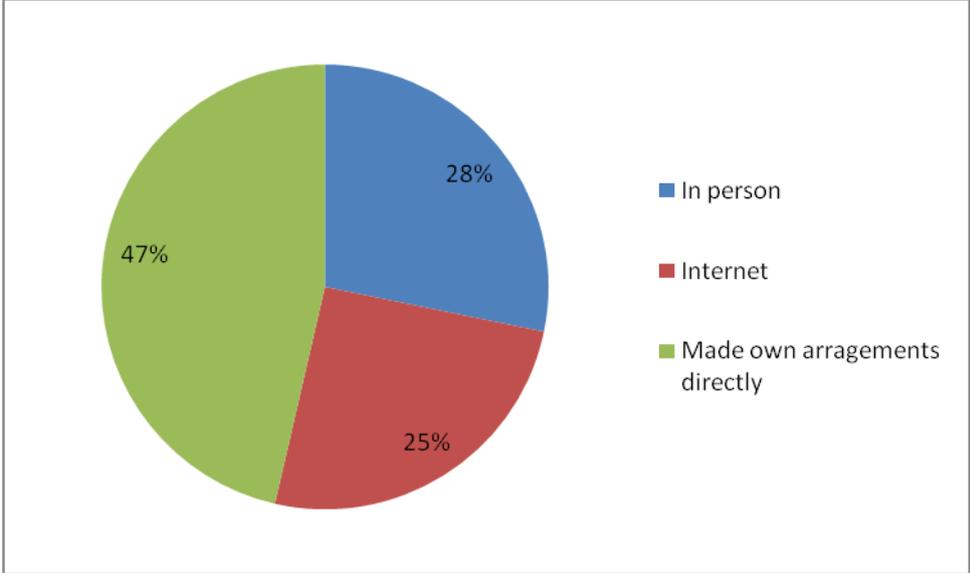
The vast majority of visitors did not make any advance booking for their trip. Only about 24% of visitors booked some form of travel or accommodation arrangements separately, and around 20% booked an all inclusive package. However, the proportion of visitors making advance bookings grew slightly in 2010 compared to 2009.

*Booking behavior 2010*



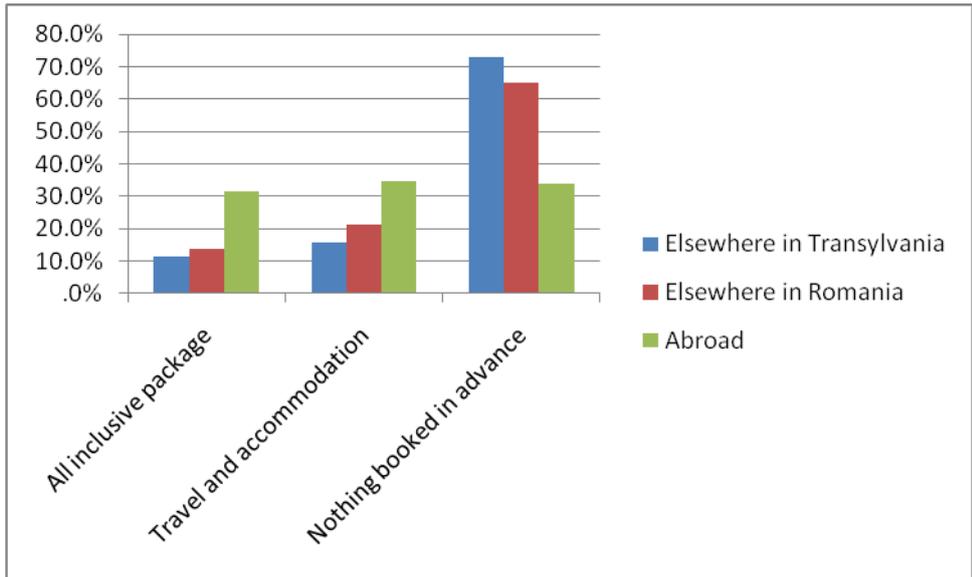
Of those who did book travel or accommodation in advance, the majority made their booking direct with the supplier. Just over a quarter booked via Internet and around 30% made a booking in person through a travel agent or tour operator. There has also been a slight growth in the proportion of visitors making travel arrangements through intermediaries in 2010 compared with 2009.

*Booking channels used 2010*



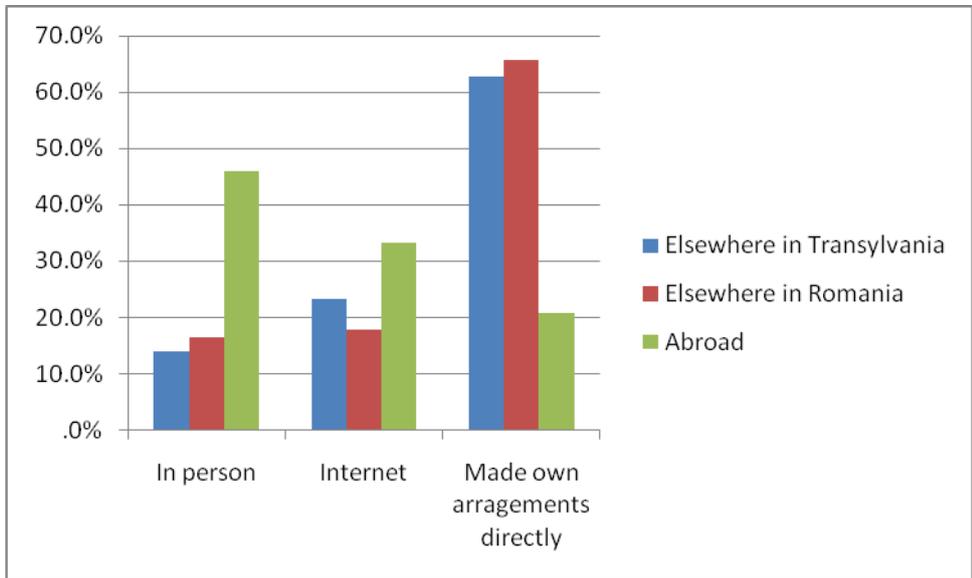
In general, foreign visitors were much more likely than domestic visitors to have made travel or accommodation bookings in advance. Over 70% of domestic tourists made no prior booking.

*Booking behavior by visitor origin 2010*



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 2010*



## 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 Bruckenthal Museum, the Lower Town and the Fortifications have increased, reflecting the investment in these areas.

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

	2007	2008	2009	2010
Bruckenthal Museum	27	71	61	57
Evangelic Church	25	60	46	39
The Lower Town	25	35	52	47
ASTRA Museum	20	58	58	54
The fortification	19	25	38	33
Fortified Churches around Sibiu	12	24	24	19
Street animation		50	42	43
None of these	36	4	7	4

*Multiple responses allowed*

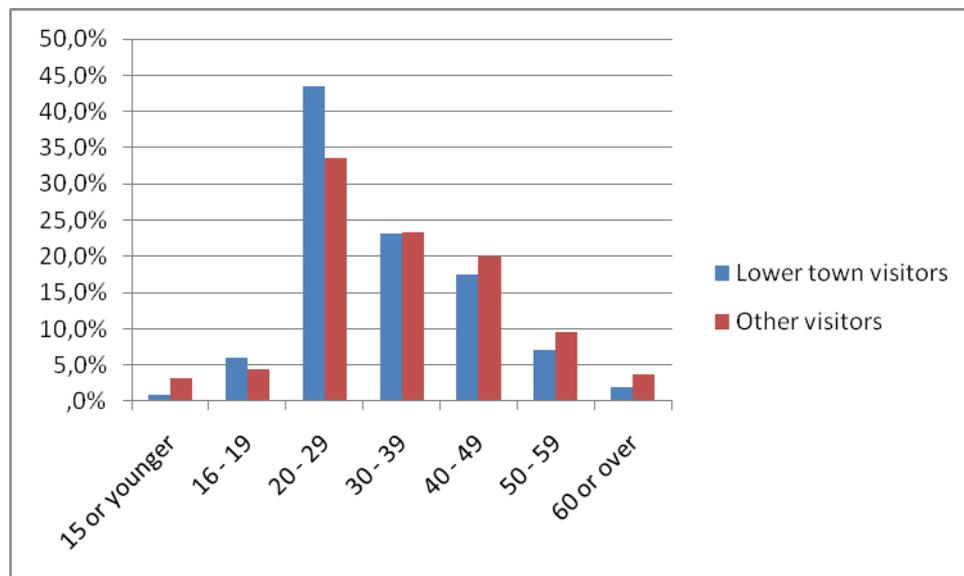
A positive trend is the increasing number of different sites visited by tourists in and around the city. In the ECOC year itself the average number of sites visited was just under two per person, but this increased to over these sites in the post ECOC period. This rise is probably due to the more focused 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 2007-2010*

Origin	2007	2008	2009	2010
Sibiu	1,8	3,9	4,2	3,7
Elsewhere in Transylvania	1,4	3,5	3,2	3,4
Elsewhere in Romania	2,2	3,7	3,3	3,2
Abroad	2,0	3,3	3,7	3,2
Total	1,9	3,6	3,7	3,4

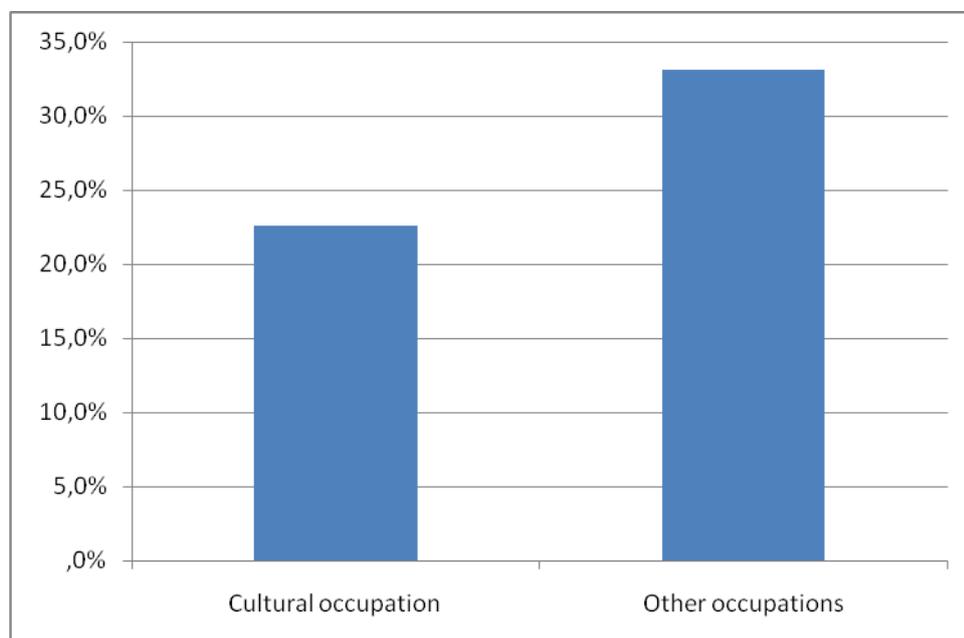
The sites visited depended to some extent on the profile of the visitors. For example, visitors to the lower town were more likely to be younger, more highly educated women.

*Visits to the Lower Town by age group 2010*



Visitors with a cultural occupation were far more likely than others to make cultural visits during their stay in Sibiu. Less than a quarter of those with a cultural occupation did not visit any cultural sites in Sibiu, compared with over a third of other visitors in 2010.

*Did not visit any cultural sites in Sibiu by occupation 2010*



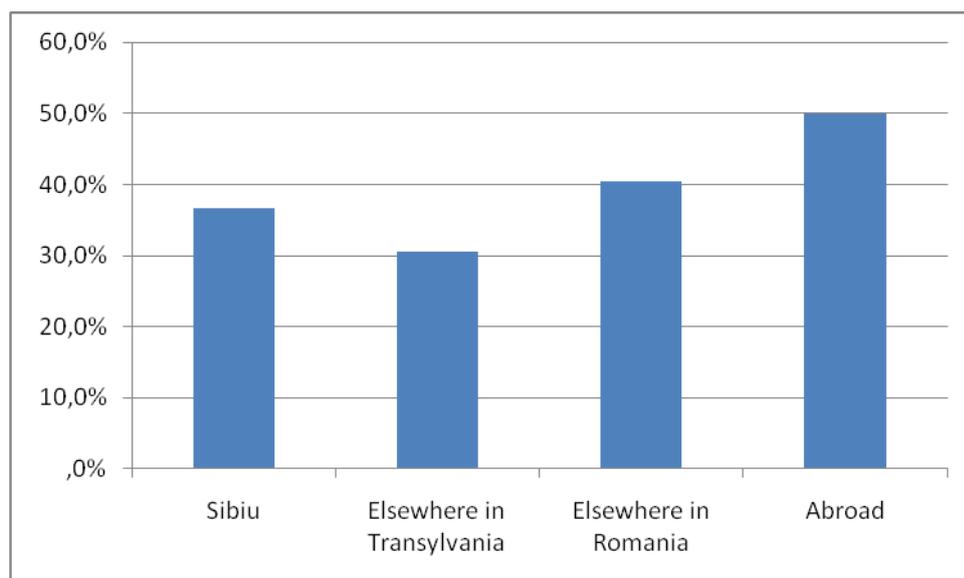
The ASTRA Museum was particularly likely to appeal to those with a cultural occupation in 2010.

*Visits to the ASTRA Museum by occupation, 2010*



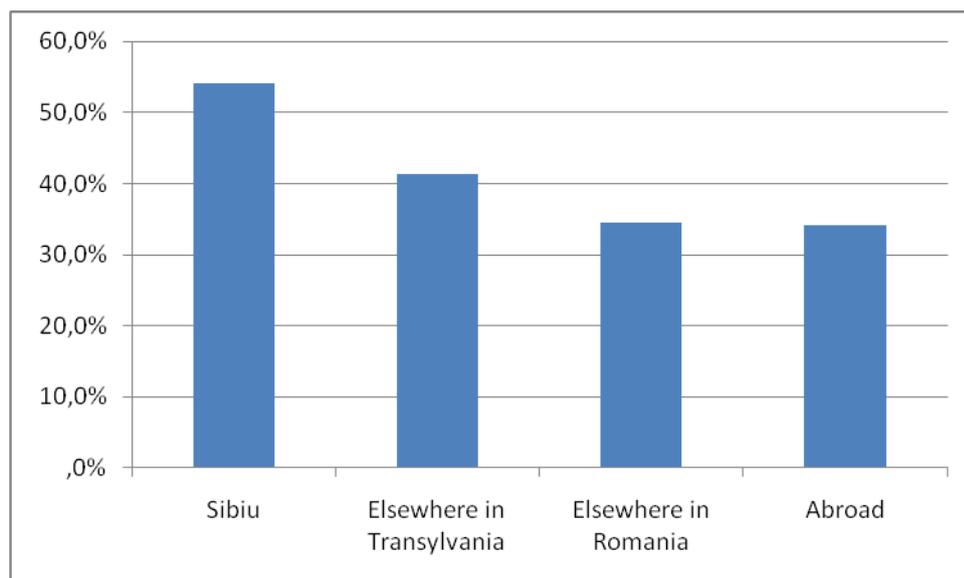
Visitors to the Evangelic church were particularly likely to come from elsewhere in Romania or abroad in 2010.

*Visitors to the Evangelic Church by origin 2010*



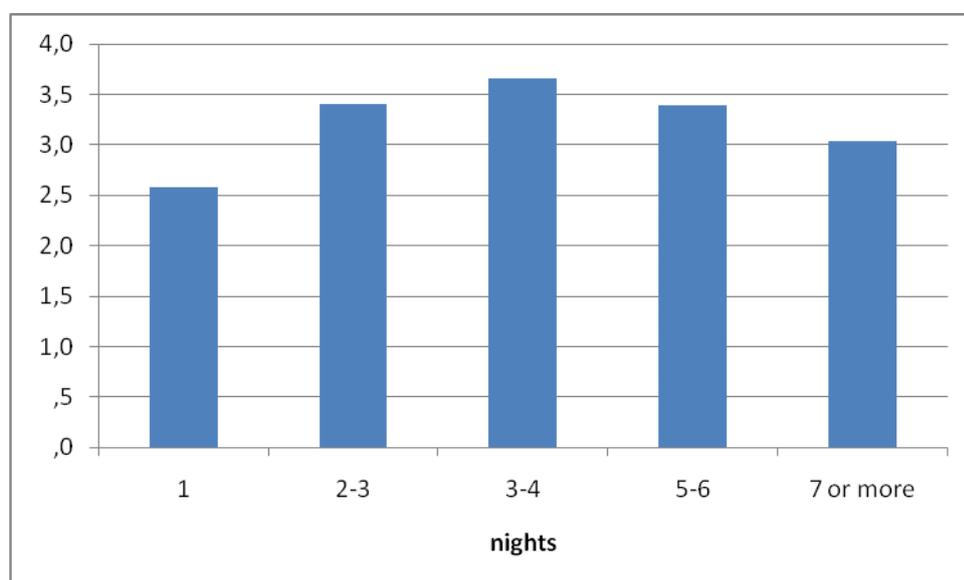
The Bruckenthal Museum, the fortifications and the Othodox Cathdral appealed equally to all visitor groups. In contrast, street animation was more likely to appeal to local visitors.

*Visitors to street animation performances by origin, 2010*



In general, the longer visitors stay in the city, the more likely they are to visit a wide range of different sites. The maximum number of sites visited in 2010 is accounted for by those staying three or four nights in Sibiu, which indicates a strong link between short breaks and cultural visitation.

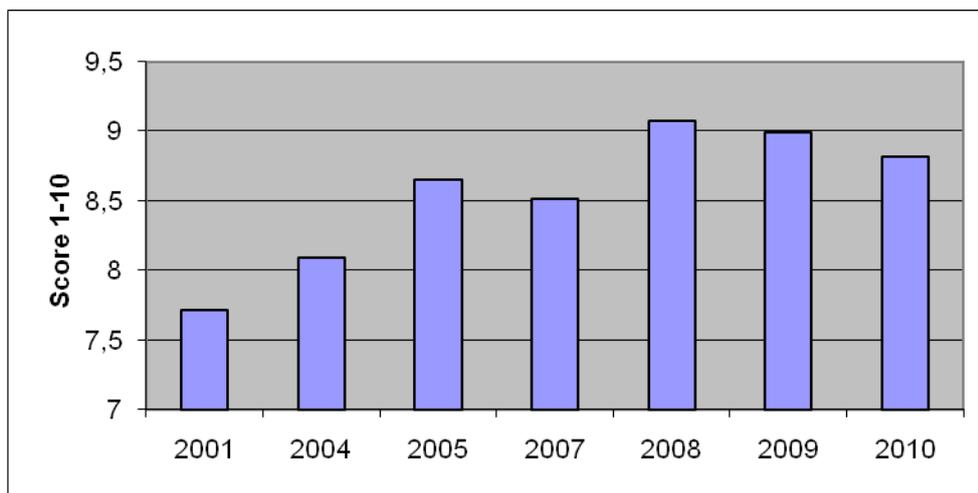
*Number of sites visited by length of stay, 2010*



## Quality of visitor experience

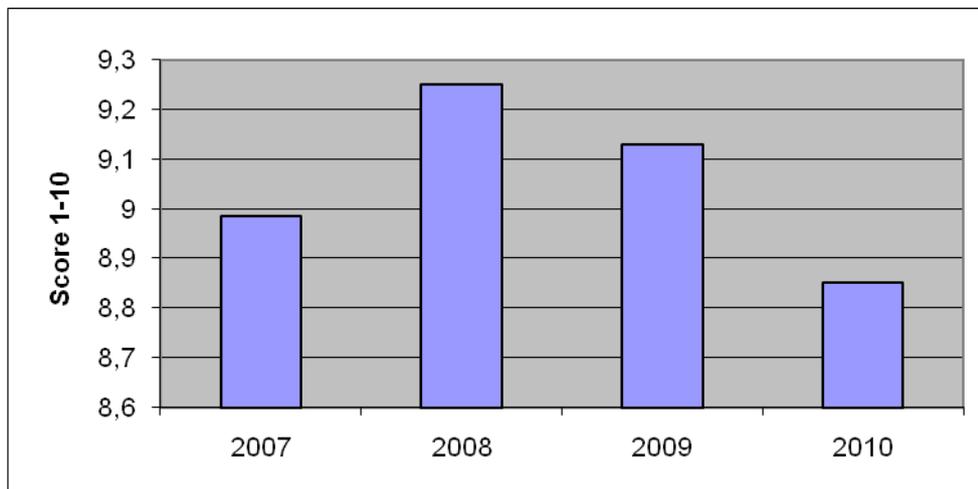
The investments that Sibiu has made in culture and tourism certainly seems to have paid off, because visitors now rate the quality of their visit to the city much more highly than in 2001. The ECOC in 2007 did not in itself produce an increase in the quality of experience, which may point to a more critical cultural audience being attracted by that event. One potentially worrying sign is also that quality scores have genety declined since a peak in 2008.

*Quality of visit (scale 1-10)*



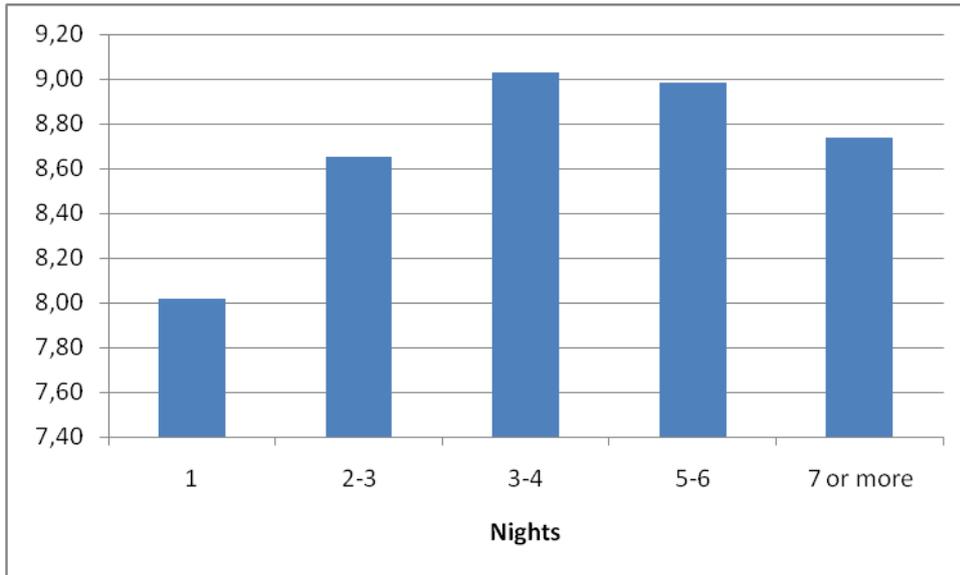
The decline since 2008 is also reflected in the rating of Sibiu as a tourist destination, which has now declined below the levels recorded in 2007.

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



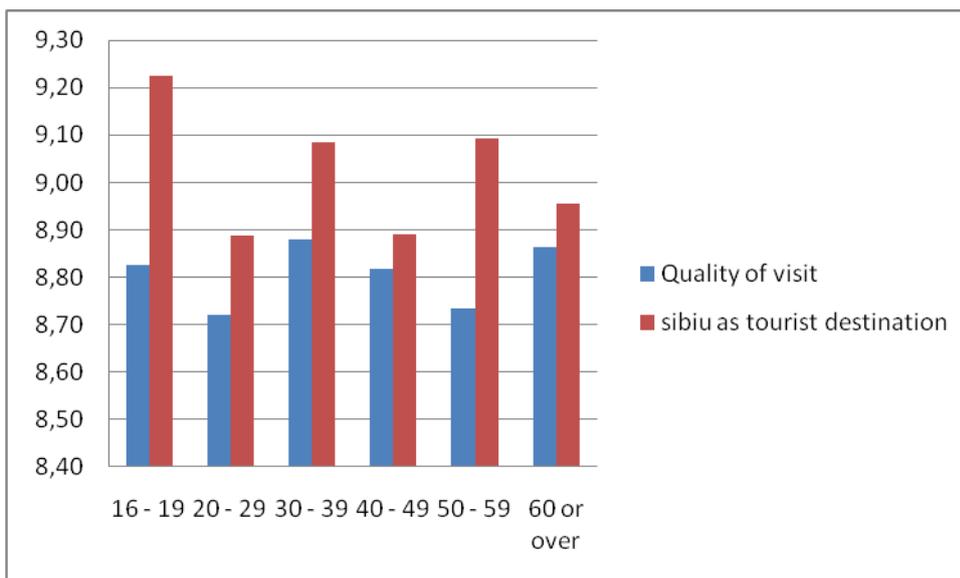
One of the interesting aspects of the quality ratings was that visitors staying one night or less tended to score Sibiu lower than those staying for two nights or more. This suggests that the first impression of visitors is relatively poor, but improves as they explore the city further.

### Quality ratings by length of stay, 2010



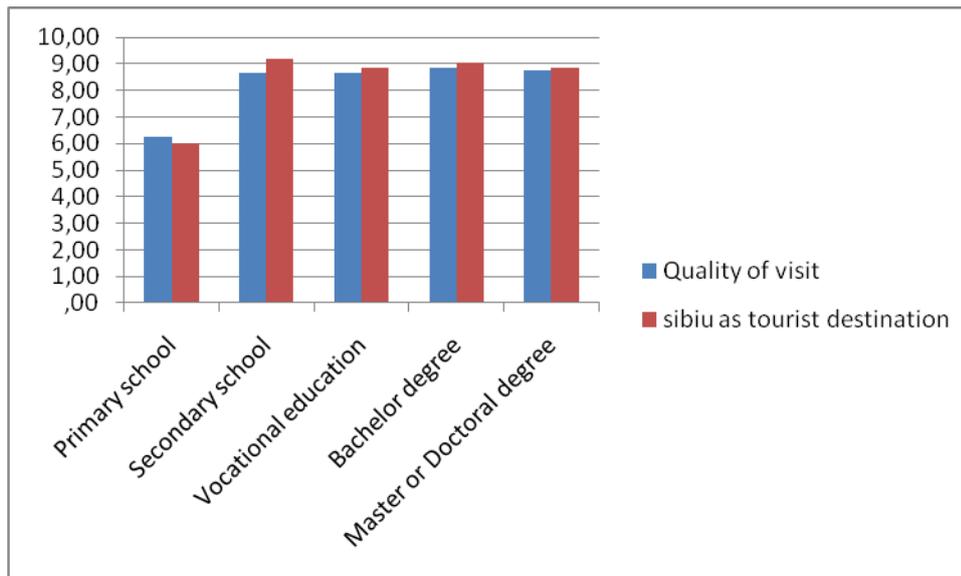
Quality ratings tended to be highest for the 30-39 and 60 plus age groups in 2010. In contrast those aged 20-29 tended to be the most negative.

### Quality scores by age group 2010



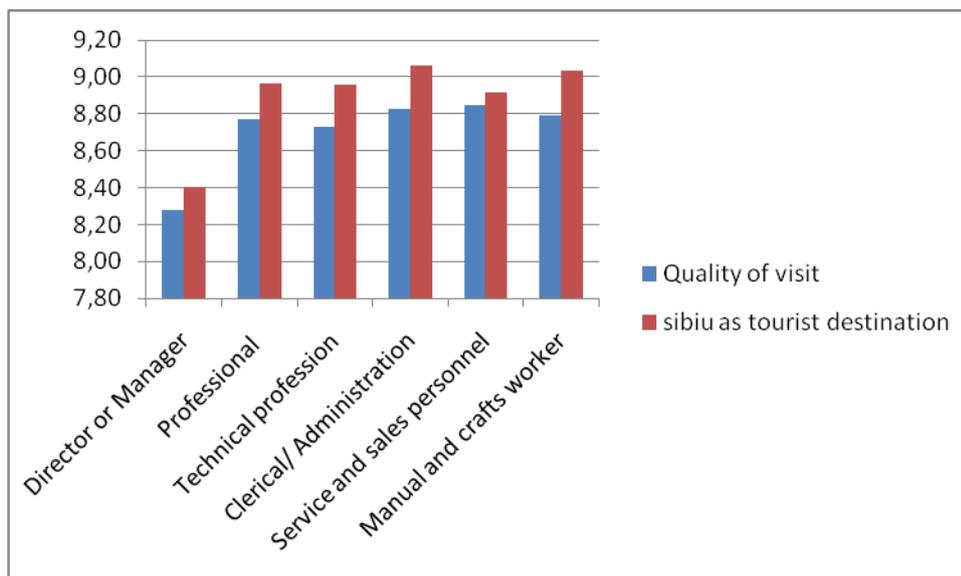
Those with lower education levels tended to give the lowest quality scores. This may be because certain aspects of the cultural offer are not so easily accessible to those with a lower education level.

### Quality scores by highest education level 2010



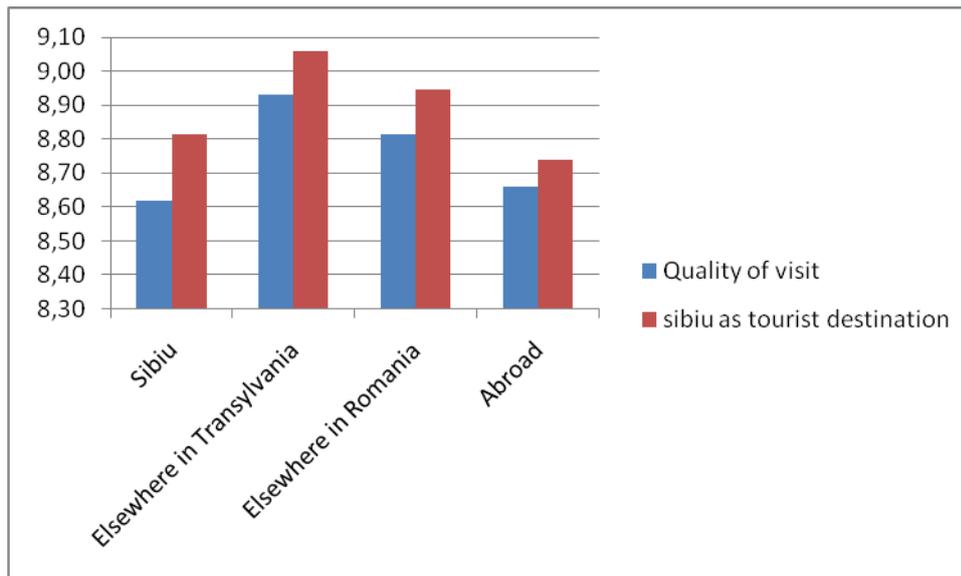
In terms of occupational profile, the quality ratings for Sibiu tended to be highest among professionals, administrative staff and manual and crafts workers in 2010.

### Quality scores by occupational group 2010



As in 2009, there was relatively little variation in quality scores by visitor origin in 2010. 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.

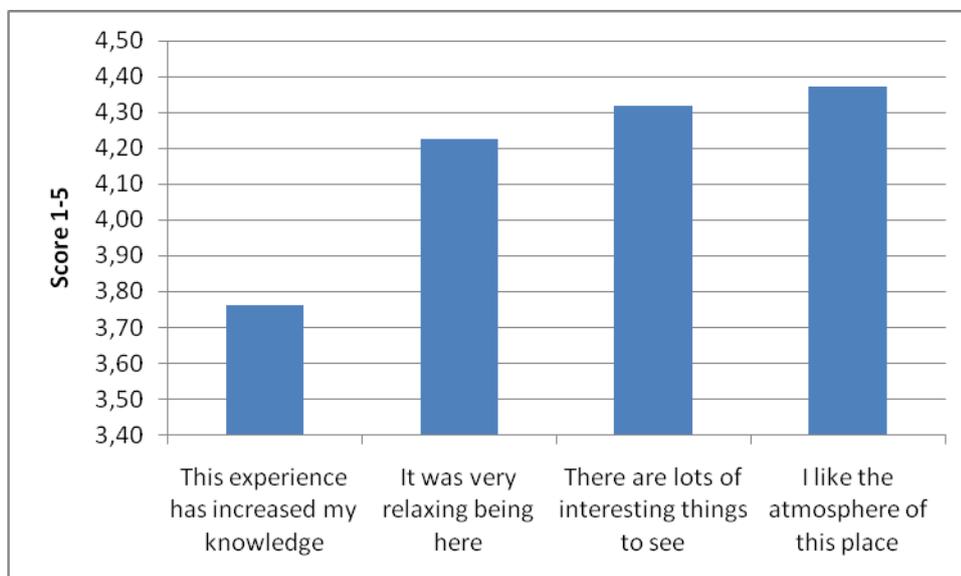
### Quality scores by visitor origin 2010



### Aspects of the visitor experience

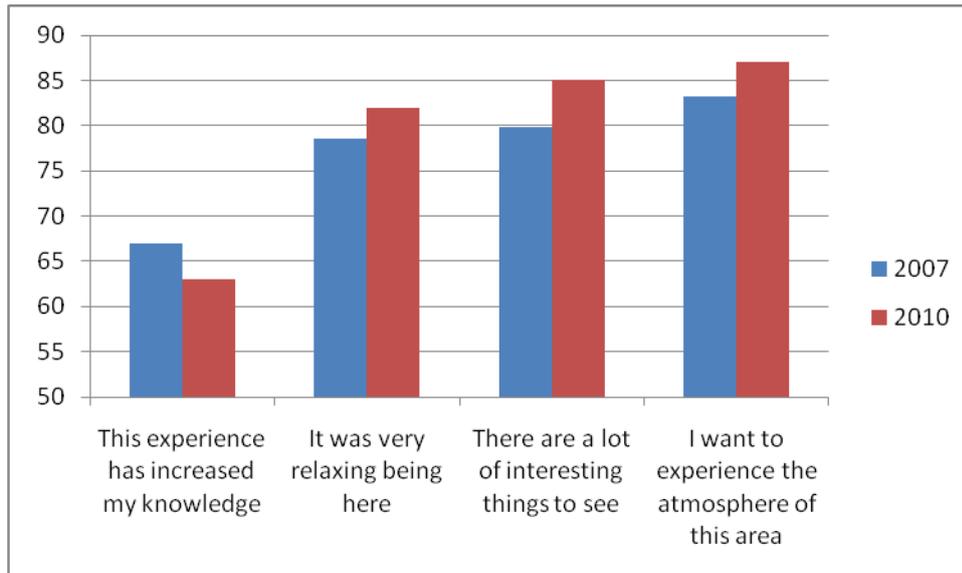
The aspects of the visit to Sibiu most appreciated by visitors remained virtually unchanged between 2009 and 2010. Visitors were most likely to appreciate the atmosphere, and least likely to indicate that they had learned something new from their visit.

#### Aspects of visitor experience in Sibiu 2010



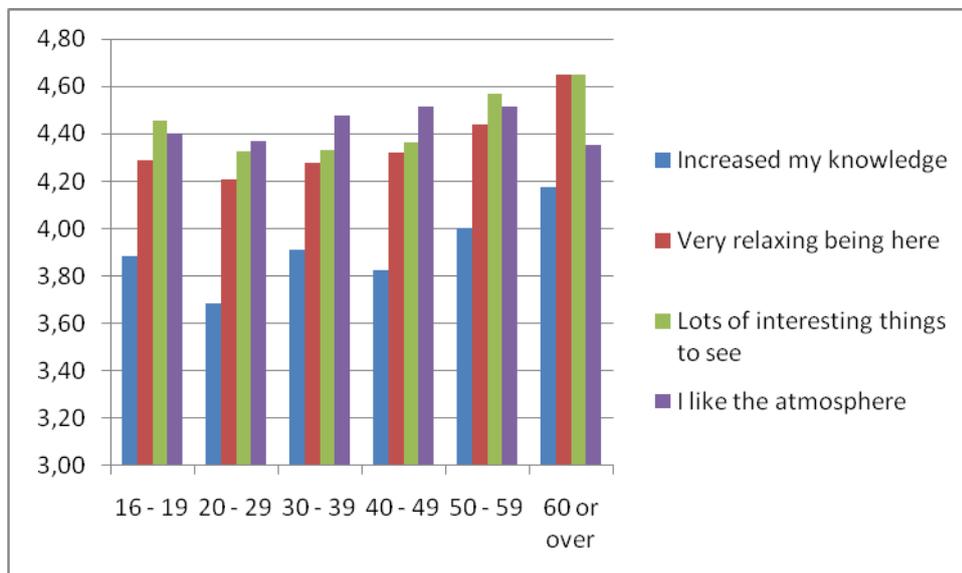
Most aspects of the visitor experience have improved in recent years. In particular, visitors were more likely to agree that there were lots of interesting things to see in 2010 than in 2007. This indicates that the city has succeeded in improving the visitor experience over the years.

### Aspects of visitor experience in 2007 and 2010



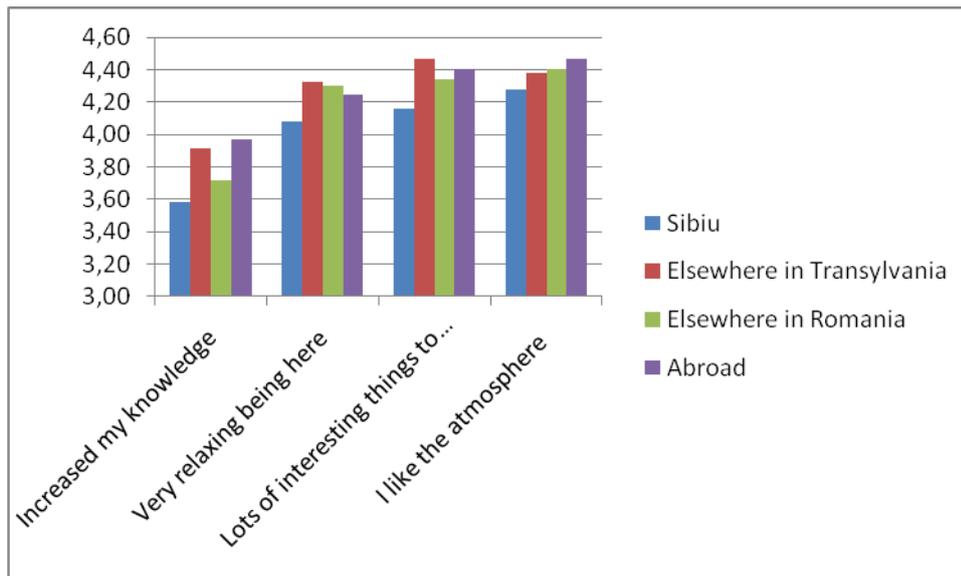
Older visitors were the most likely to agree that their visit had been positive in all aspects of the experience, whereas younger visitors tended to give a much higher score to the atmosphere than to the learning aspects of the experience.

### Aspects of visitor experience by age group, 2010



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.

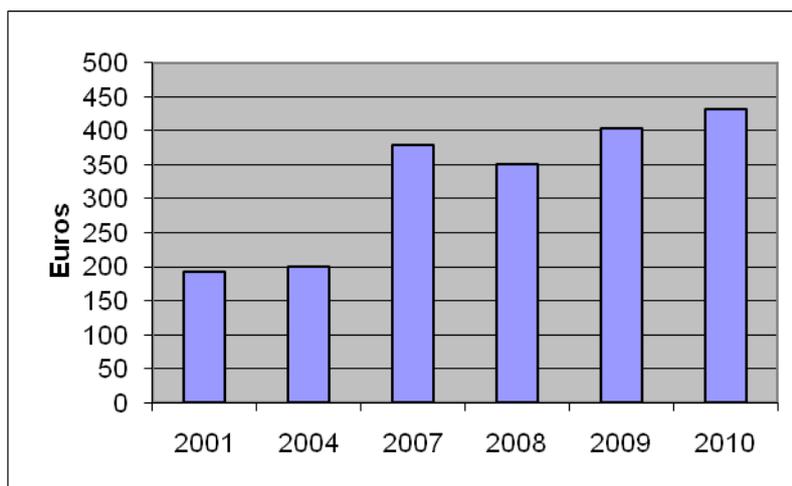
### Aspects of visitor experience by visitor origin, 2010



### Economic impact

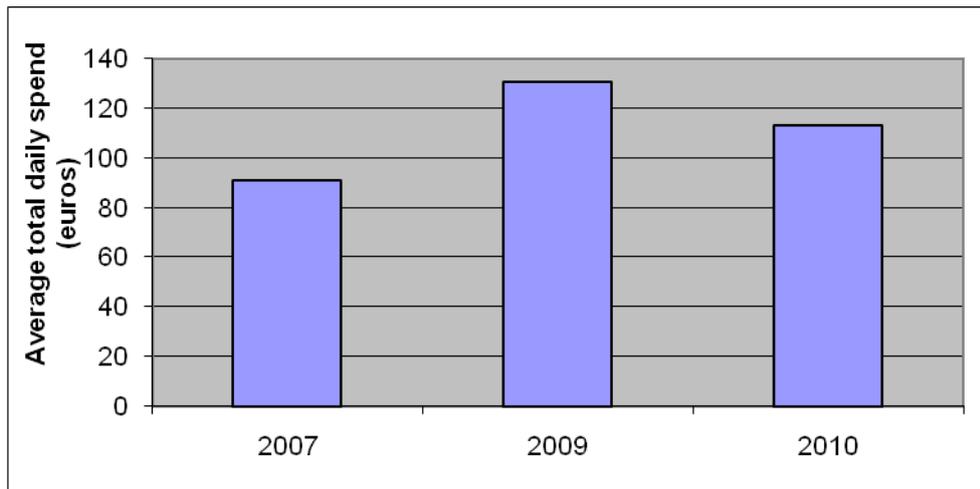
One of the most important motivations for staging cultural events such as the ECOC is the economic impact that these can generate for the host city. Figures on average visitor spending show that spend levels increased particularly sharply during the ECOC in 2007, largely because of the influx of high spending foreign visitors. However, even in the years after the ECOC average expenditure has continued to rise. This underlines the structural change in the nature of the tourist market, with more high spending cultural tourists attracted to the city. But is also reflects the impact of hotel investment, which has increased accommodation spend substantially.

#### Average total visitor spend 2001-2010



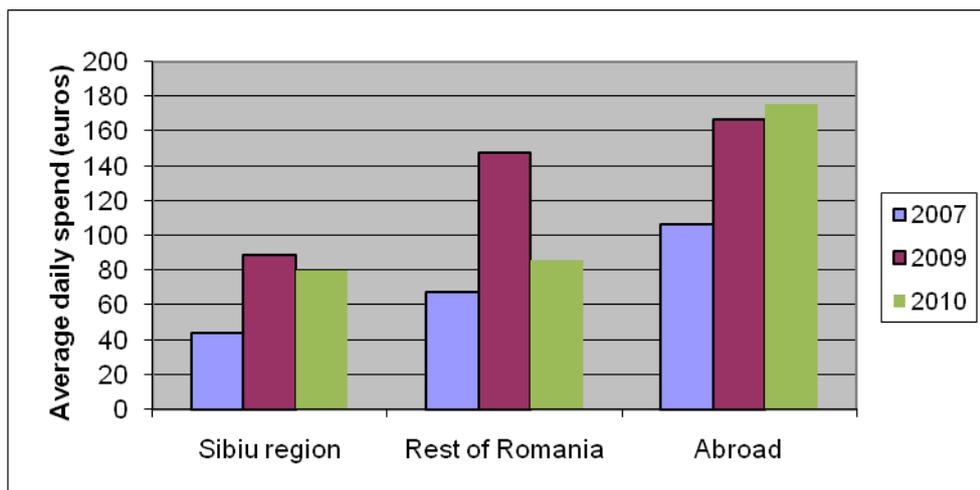
Total average visitor expenditure increased after the ECOC, and the average spend is now 25% higher than in 2007. This is in spite of the fact that the ECOC attracted a relatively high number of foreign tourists and other high spending guests. Our data indicate a shift in spending patterns, including more spend on shopping (see below). In 2010 the average spend per day fell slightly compared with 2009, partly as a result of the longer length of stay of high-spending hotel visitors.

*Average spend per day (Euros) 2007, 2009 and 2010*



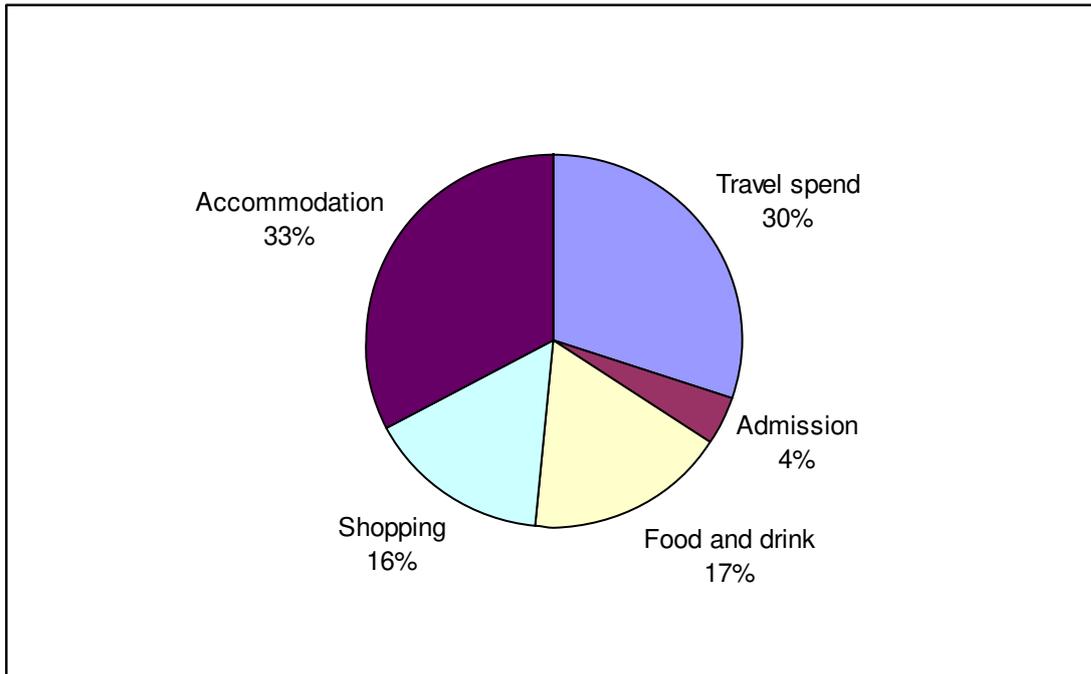
Not surprisingly the average daily spend of foreign tourists is significantly higher than that of Romanian visitors. Romanian tourists also exhibited a strong decline in spend per day in 2010, probably reflecting the effect of the crisis.

*Average spend per day (Euros) by visitor origin 2007-2010*

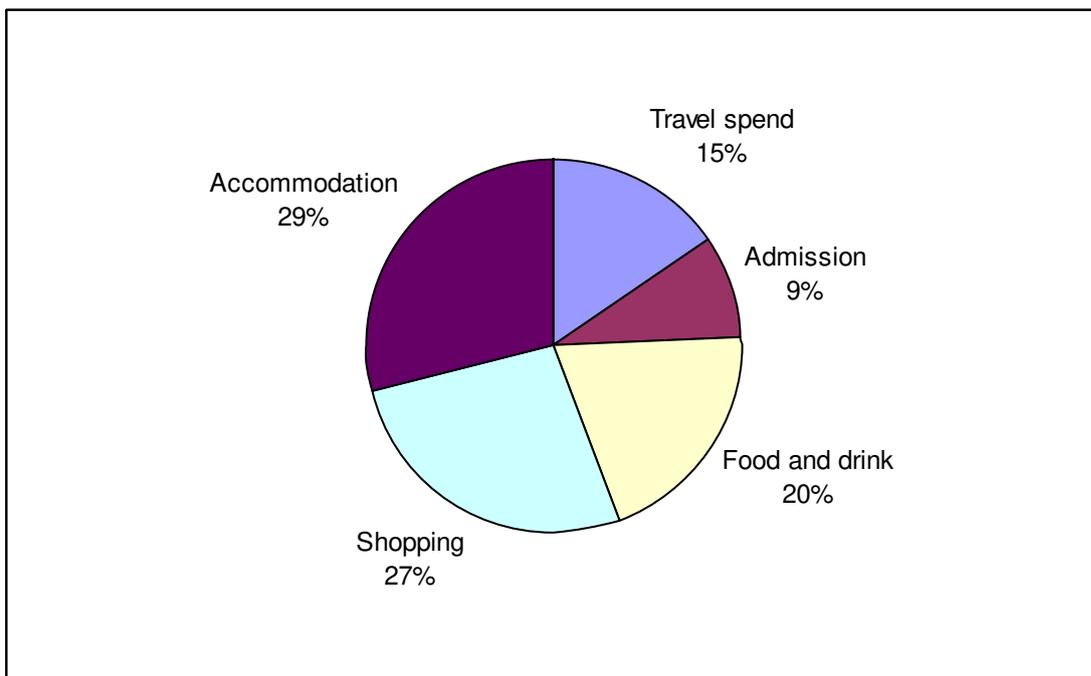


In 2009 relatively more was spent on shopping and admissions, and less on travel (reflecting the higher level of domestic tourism).

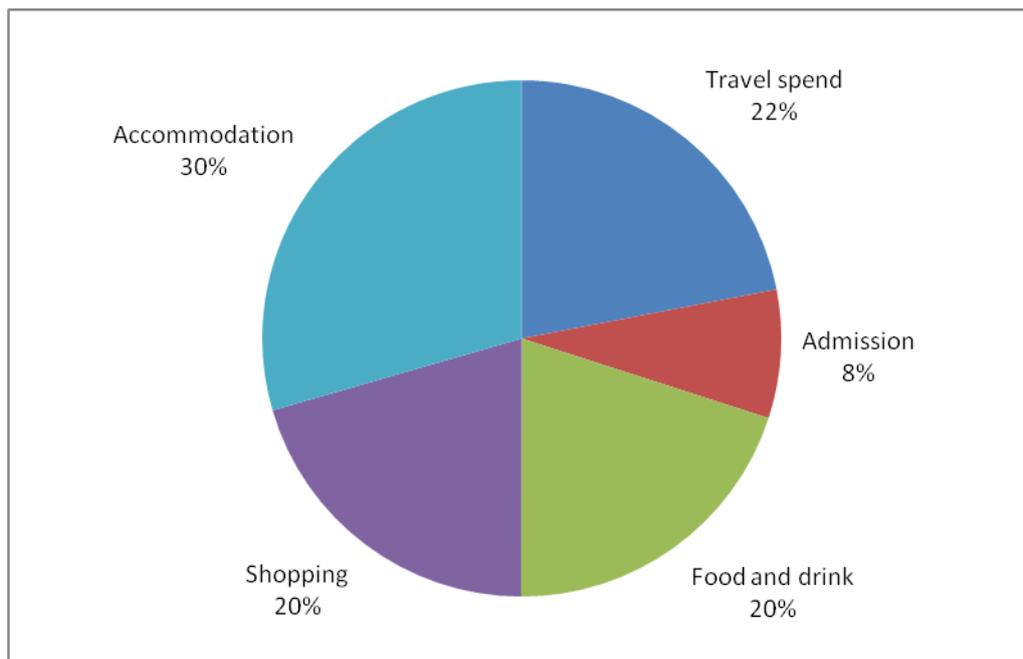
Visitor spend by category 2007 (excludes Sibiu residents)



Visitor spend by category 2009 (excludes Sibiu residents)



*Visitor spend by category 2010 (excludes Sibiu residents)*



In 2010 shopping expenditure fell and travel spend grew as a proportion of the total. However, shopping expenditure still accounted for a higher proportion (and a much high absolute amount) than in 2007.

Expenditure was particularly high for hotel guests, who tended to spend almost twice as much as other visitors. The only area in which hotel guest spending fell in 2010 was on shopping.

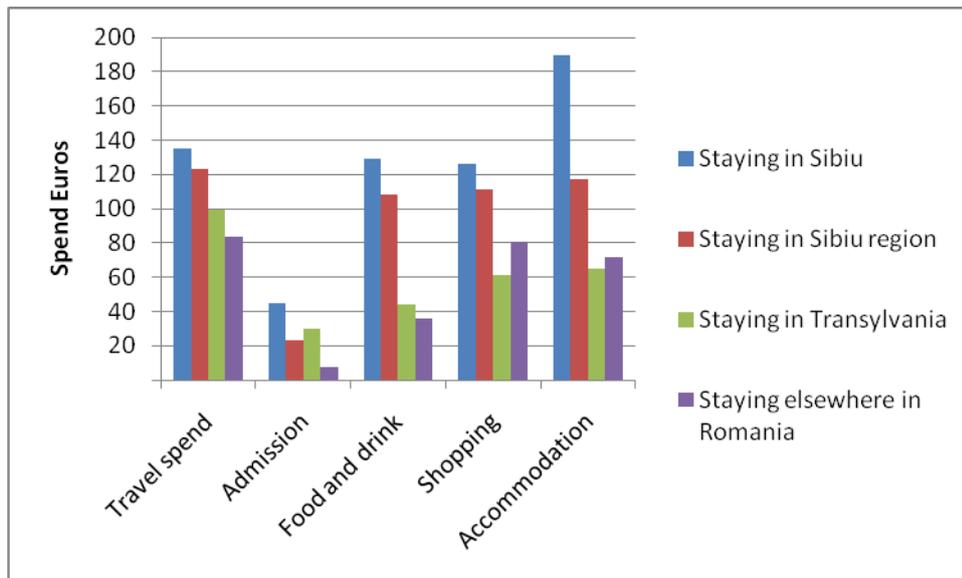
*Spend by hotel guests in Euros*

	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
2010	249,45	82,67	187,50	167,91	309,99

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.

For the local economy, the most important data relate 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 more on accommodation and 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 per visitor by location of accommodation 2010*



**Total tourism expenditure trends**

Looking at the longer term trends in tourism arrivals and bednights, it is clear that the ECOC produced significant growth in 2007, which is by far the peak year for tourism demand in the last decade. Since 2007 there has been a decline in both arrivals and bednights, largely due to the impact of the economic crisis. Even so, levels of demand are still higher than 10 years ago, and figures for 2010 showed a slight improvement over 2009. The arrivals and overnights for foreign visitors were notably higher in 2010 after a significant fall in 2009. In the city of Sibiu itself, the number of foreign bednights reached the highest level since 2007.

*Tourist arrivals and bednights in Sibiu county 2006-2010*

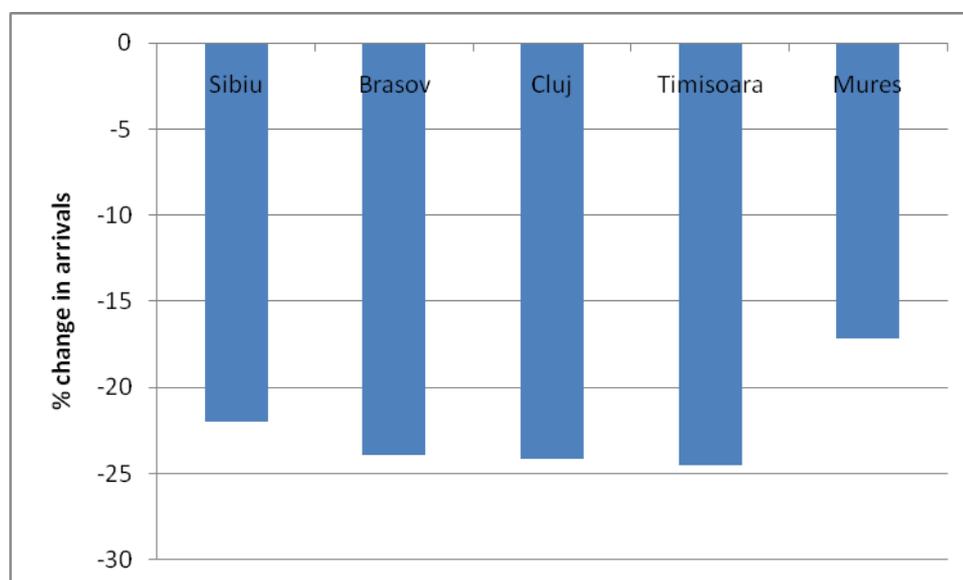
	Arrivals		Bednights	
	total	foreigners	total	foreigners
<b>2001</b>	165,613	53,421	309,796	88,213
<b>2004</b>	214,942	74,586	368,305	124,287
<b>2006</b>	252,694	68,732	434,455	121,550
<b>2007</b>	327,925	92,052	530,100	157,629
<b>2008</b>	287,103	72,177	459,342	109,996
<b>2009</b>	220,491	55,808	381,672	77,849
<b>2010</b>	228,031	64,293	339,576	106,979

### Tourist arrivals and bednights in Sibiu 2006-2010

	<b>Arrivals total</b>	<b>foreigners</b>	<b>Bed nights total</b>	<b>foreigners</b>
<b>2006</b>	150,000	No data	235,000	No data
<b>2007</b>	178,532	69,434	280,993	117,170
<b>2008</b>	147,000	47,265	204,005	67,930
<b>2009</b>	120,373	42,129	164,281	54,636
<b>2010</b>	143,839	50,990	233,560	88,189

The data for 2008 and 2009 indicated 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. 2010 shows a recovery for Sibiu and a descending trend for the whole county. 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. In 2010 the town of Sibiu is an exception for Romania, as it seems to have regained its 'normal' tourist arrival levels in spite of the general economic decline and the fall in tourism nationally. 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 2010, 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, 2007-2010*

	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
2010	233,560	113	26.39

On the basis of the tourists staying in registered accommodation in Sibiu city alone, total tourism spend was over €26 million in 2010, even higher than 2007, the ECOC year. As with most other ECOC, Sibiu saw a decline in tourism levels and therefore total expenditure in the immediate post-event period. But recovery has been relatively rapid in spite of the impact of the economic crisis after the ECOC, thanks to the high spending tourists attracted by the cultural image and new attractions of the city.

If we add the impact of visitors staying with friends and relatives, then the indications are that total tourism spending has now reached almost €50 million, exceeding the levels estimated in 2007 by almost 40%. It seems that in addition to the boost given to high-spending tourism by hotel construction, as a result of the economic crisis many Romanian visitors have also made use of accommodation provided by friends and relatives. Although this reduces the accommodation spend, it still gives a significant boost to the local economy.

*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
2010	26.4	34	22.2	47.6

## 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. Since 2001 the number of hotels has more than doubled and total registered accommodation units have grown by 40%. This shows that although most growth has taken place at the higher end of the market, all forms of accommodation have benefited from this growth.

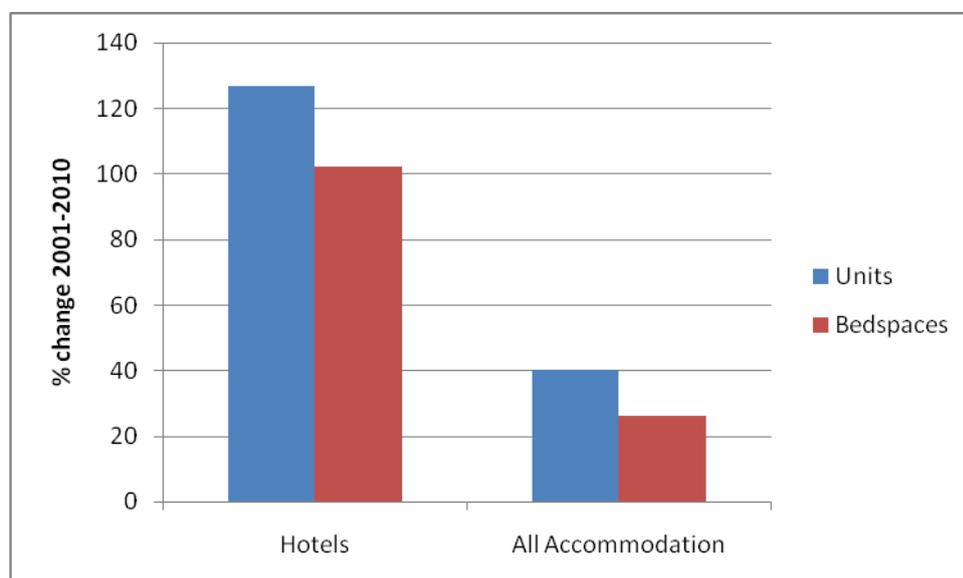
### *Capacity in Sibiu county hotels, 2001-2010 according to official statistics*

	2001	2004	2006	2007	2008	2009	2010
units	15	18	22	24	24	30	34
Places	1655	1813	1965	2440	2296	2608	3348

### *Capacity in Sibiu county all accommodation, 2001-2010 according to official statistics*

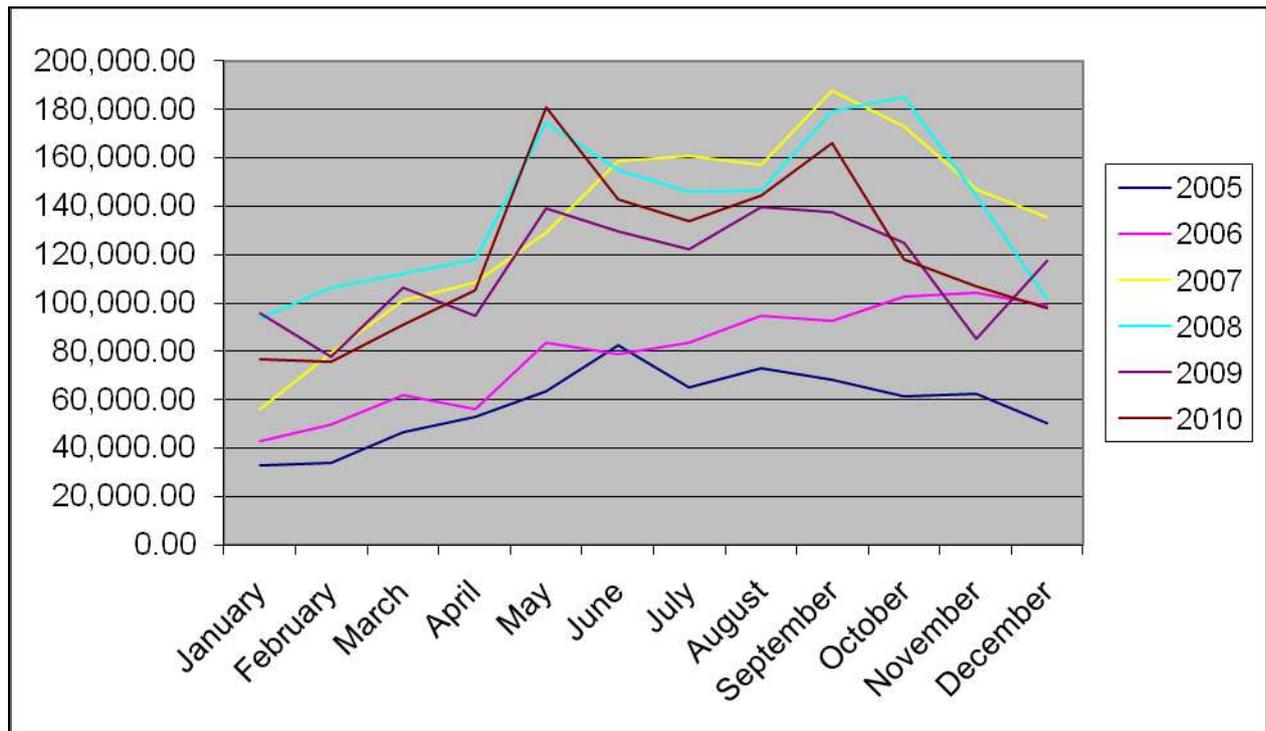
	2001	2004	2006	2007	2009	2010
units	119	114	129	137	172	167
places	5183	4589	4333	5123	5265	6538

### *% growth in accommodation supply 2006-2010*



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 remained at these high levels after the ECOC.

*Accommodation tax revenues, 2005-2010 in ROL*



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. 2010 shows a renewed growth, highlighting the resilience of the Sibiu tourism sector.

*Total hotel tax revenues 2005-2010*



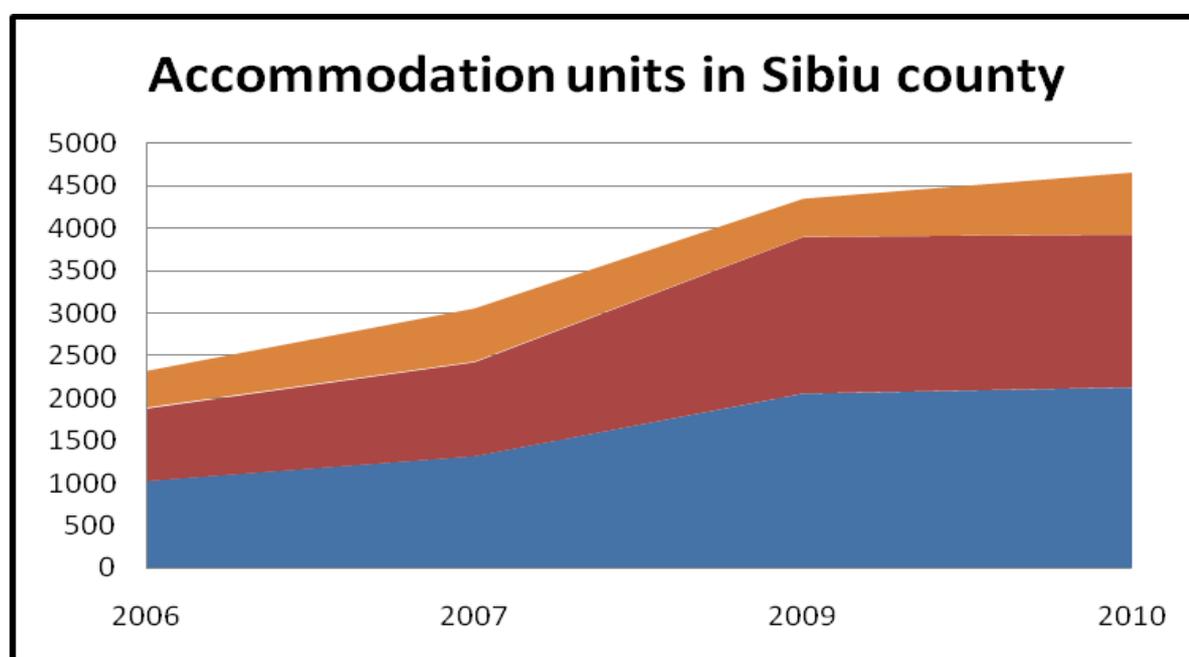
Some of the increase in hotel revenues is due to tourism growth, but there is also an important effect from the upgrading in the hotel stock. By 2010 Sibiu had an additional 6 four or five star hotels compared with 2006.

### 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
2010		2	10	12	6	1	31

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.

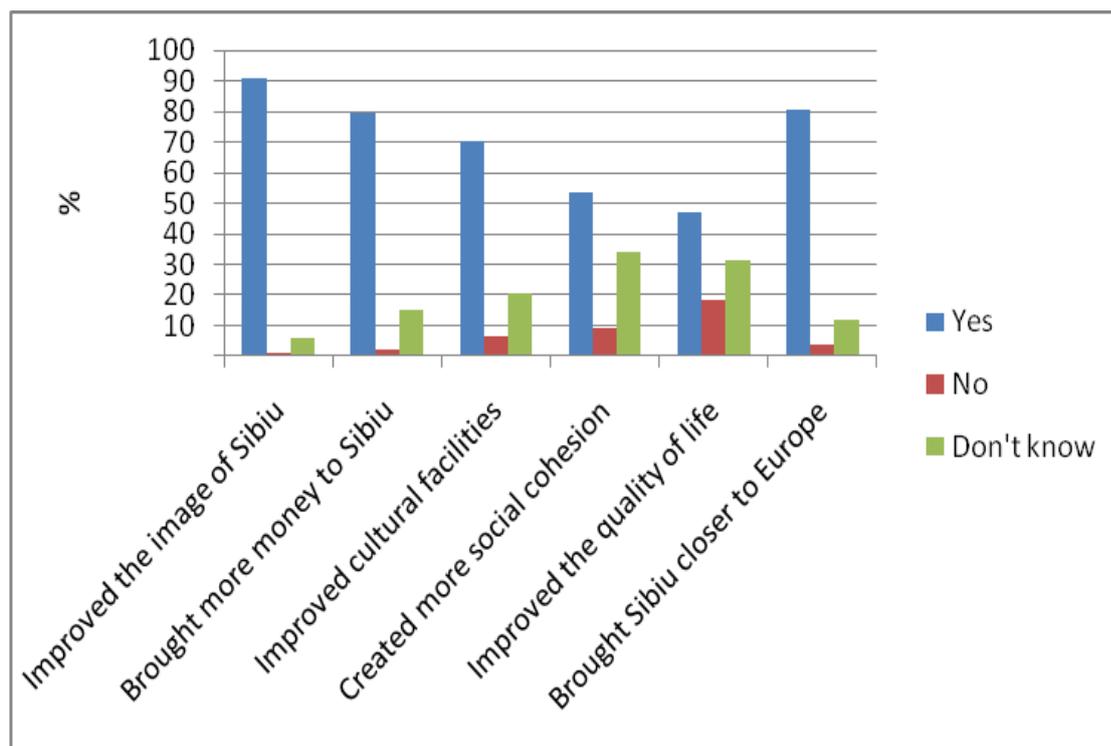
The growth of hotel accommodation in Sibiu itself also had a strong impact on the surrounding region. Growth in the regions close to Sibiu was just as strong as in the city itself.



### 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, 2010 (all respondents)*



Fewer people tended to agree that the ECOC had created more social cohesion in Sibiu or improved the overall quality of life. The proportion of people agreeing with these statements also fell more rapidly after the ECOC than the level of agreement with statements on 'harder' factors such as economic impact. Although the level of agreement with the statement that the image of Sibiu had improved changed very little after the ECOC, agreement with the social cohesion and quality of life statements fell markedly after the ECOC.

It seems that the quantitative impacts of the ECOC in terms of image and economy have had a more durable impact over the longer term. The less tangible social factors (which are also more difficult to measure) show a greater decline after the ECOC. It may be that the event itself had an important effect in terms of bringing people together physically, but that these contacts and the feeling of well being they generated, have worn off over the years. It should be noted, however, that much of the decline in agreement with the statements on social cohesion and quality of life is accounted for by 'don't know' responses.

*Statements about the impact on Sibiu 2007-2010 (% agree)*

% totally agree	2007	2008	2009	2010
Improved the image of Sibiu	98	92	94	93
Brought more money to Sibiu	94	82	78	82
Improved cultural facilities	89	79	78	72
Created more social cohesion	67	62	65	55
Improved the quality of life	53	61	52	48
Brought Sibiu closer to the rest of Europe		85	86	84

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.

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

%	2008	2009	2010
Yes	83	76	68
No	3	7	11
Don't know	14	17	21

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

%	2008	2009	2010
Yes	76	61	56
No	8	8	13
Don't know	17	31	31

In terms of the overall evaluation of the ECOC, almost 80% of those surveyed in 2010 agreed that Sibiu had made good use of the ECOC, a slight decline compared with the immediate post-ECOC period.

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

%	2008	2009	2010
Yes	86	84	79
No	3	4	3
Don't know	11	12	17

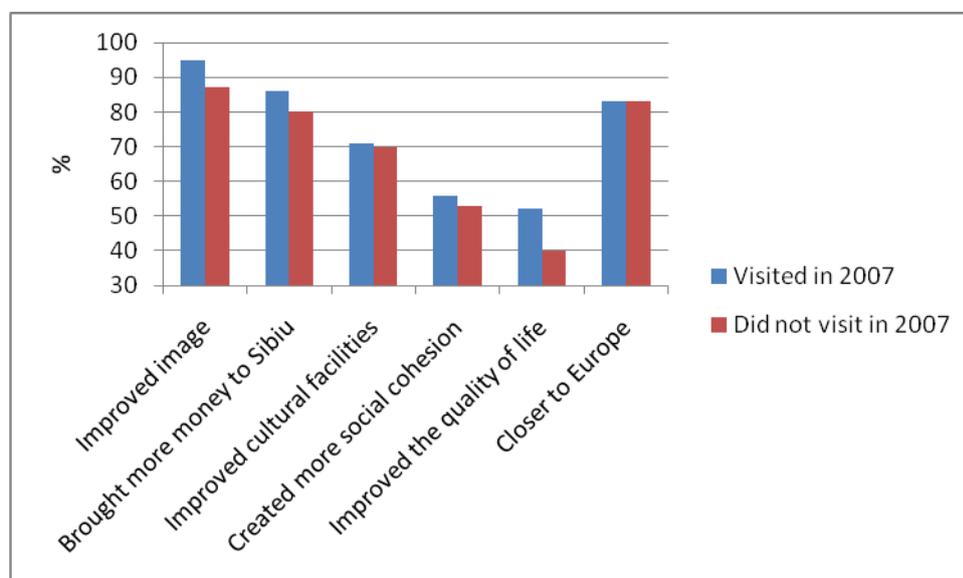
The impressions of the impacts of the ECOC tended to be even more positive among residents. This is not surprising, since they are better able to see and feel the changes in the city. Almost all Sibiu residents totally agreed that the ECOC had improved the image of the city, had brought more money and have improved cultural facilities. Interestingly, foreign visitors were much more likely than Romanian respondents to agree that Sibiu had gained more attention in international media. This indicates that the impact of the ECOC in attracting international media attention, and thereby forming or improving the image of Sibiu abroad, has been significant.

*Impacts of ECOC by origin 2010*

% totally agree	Sibiu	Elsewhere in Transylvania	Elsewhere in Romania	Abroad
Improved the image of Sibiu	97	94	90	86
Brought more money to Sibiu	85	85	83	72
Improved cultural facilities	78	69	70	65
Created more social cohesion	58	53	57	49
Improved the quality of life	51	53	46	43
brought Sibiu closer to the rest of Europe	85	78	83	86
Do you think there is more attention for Sibiu in the national media as a result of the European Capital of Culture?	71	72	69	57
Do you think there is more attention for Sibiu in the international media as a result of the European Capital of Culture?	54	49	52	68
Overall, do you think Sibiu made good use of the opportunity of being European Capital of Culture in 2007?	86	82	78	66

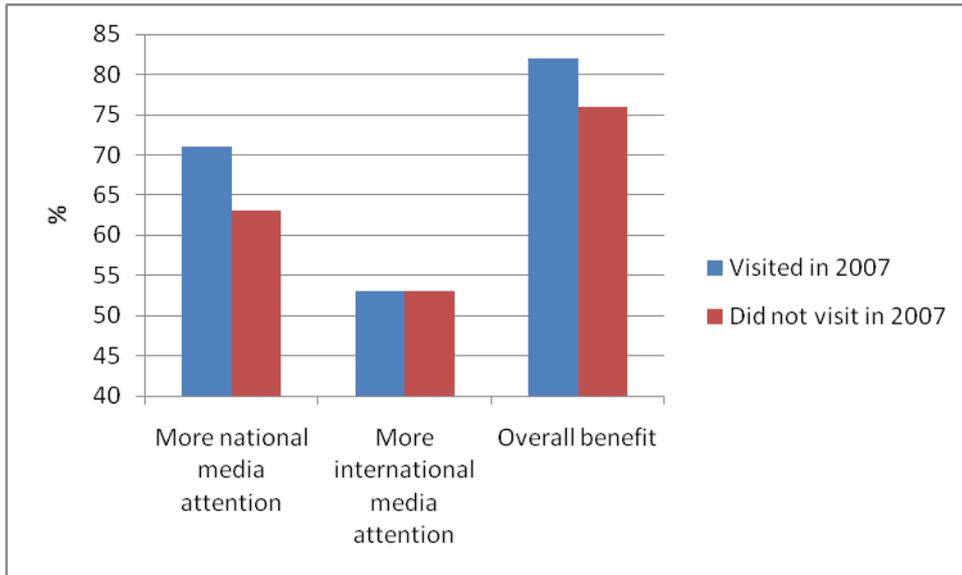
For those people from outside Sibiu who visited the European Capital of Culture in 2007, their impressions tended to be more positive than people who did not visit in 2007. This indicates that the ECOC had a lasting effect in improving the image of the city and making visitors positive about Sibiu. However, the differences between visitors and non-visitors have declined in the period since the ECOC. This may indicate that visitors to the ECOC have revised their opinion of the impacts somewhat, but it may also indicate a more generalized impression of the benefits of the ECOC among the population as a whole.

*Impacts of the ECOC for visitors and non-visitors in 2007*



Those who visited in 2007 were also more likely to state that Sibiu had attracted more media attention nationally and that the city had benefitted from the ECOC.

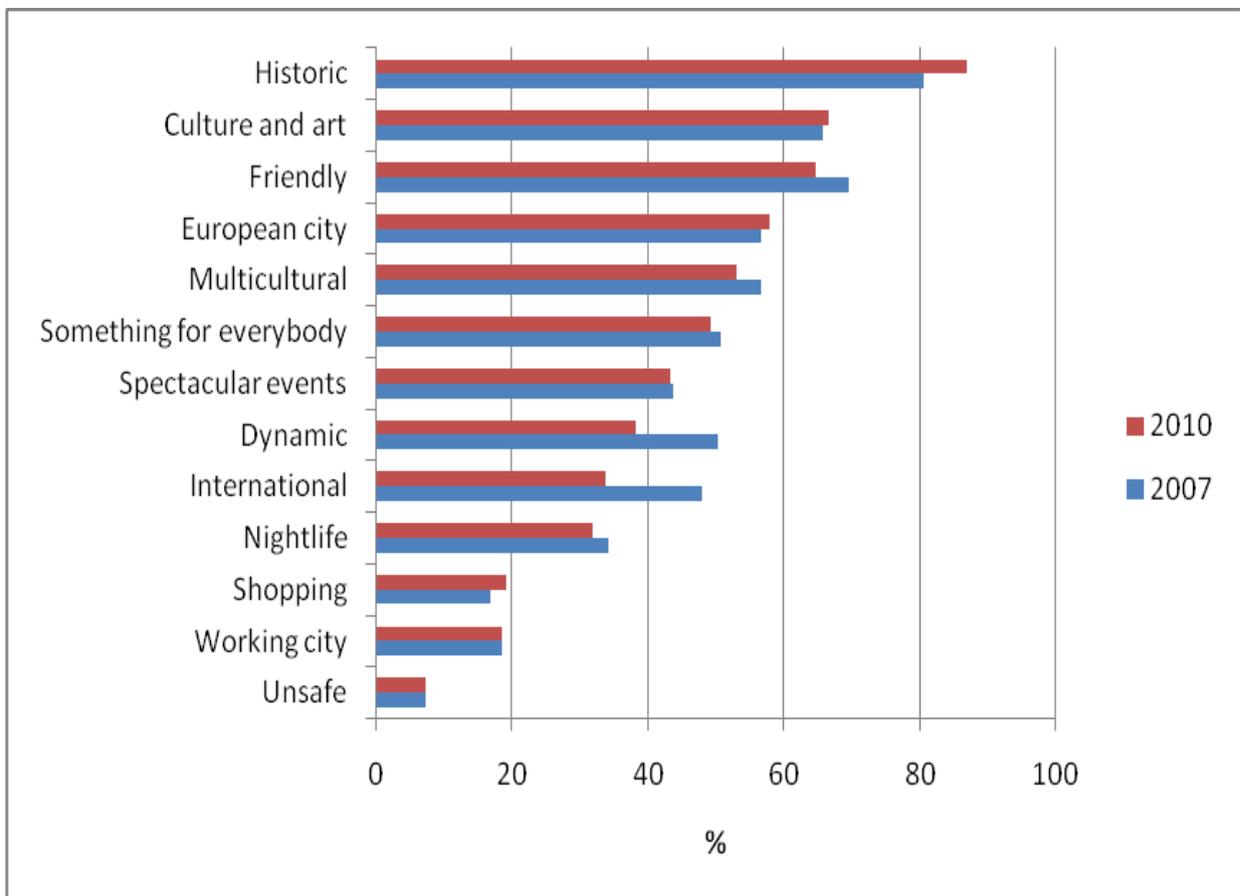
*Media attention and overall ECOC benefit for visitors and non-visitors in 2007*



**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. Other elements, such as dynamic, international and friendly have declined compared with the ECOC itself. This indicates the importance of events such as the ECOC in animating the city.

*Image elements for Sibiu, 2007 and 2010, all respondents*



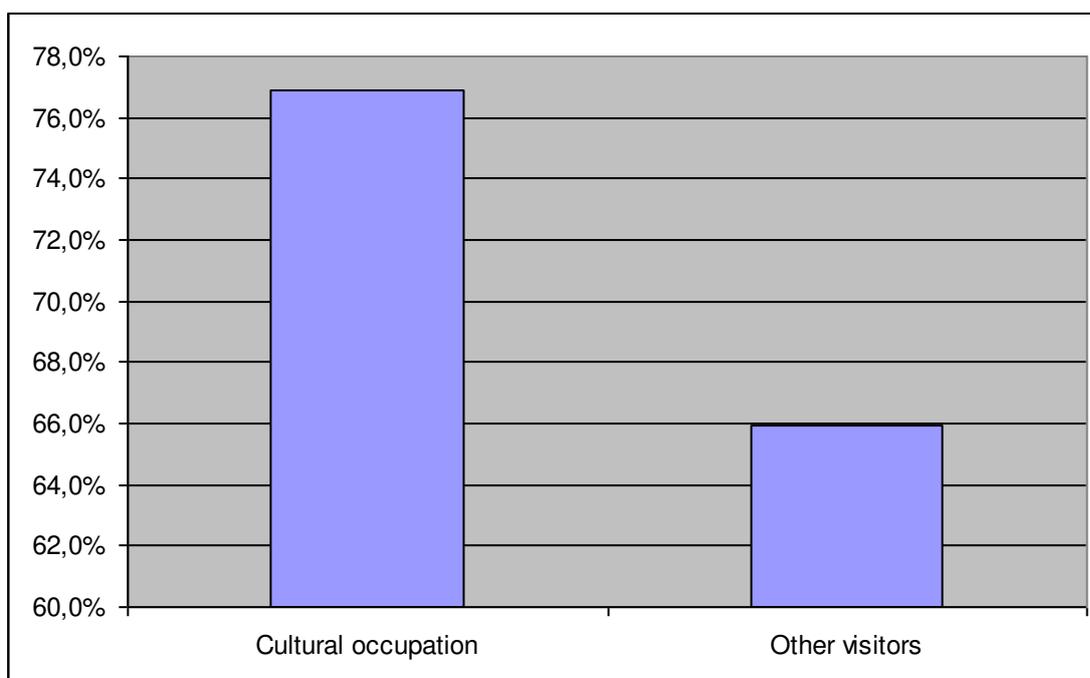
It is obvious that the image of Sibiu for a wide range of elements is not as strong for foreign visitors as Romanians, who are much more likely to have been to the city before. Foreign visitors are less likely to see Sibiu as international or European, but on the other hand they are just as likely as 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 2010*

% agree	Sibiu	Elsewhere in Transylvania	Elsewhere in Romania	Abroad
International	34	37	36	25
Culture and art	66	70	63	71
Friendly	58	60	70	77
European city	59	60	60	49
Multicultural	53	56	57	48
Shopping	18	25	20	14
Working city	21	19	13	19
Unsafe	7	5	7	7
Nightlife	31	33	31	36
Dynamic	34	47	39	36
Historic	86	84	89	87
Something for everybody	44	52	55	48
Spectacular events	38	48	51	42

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

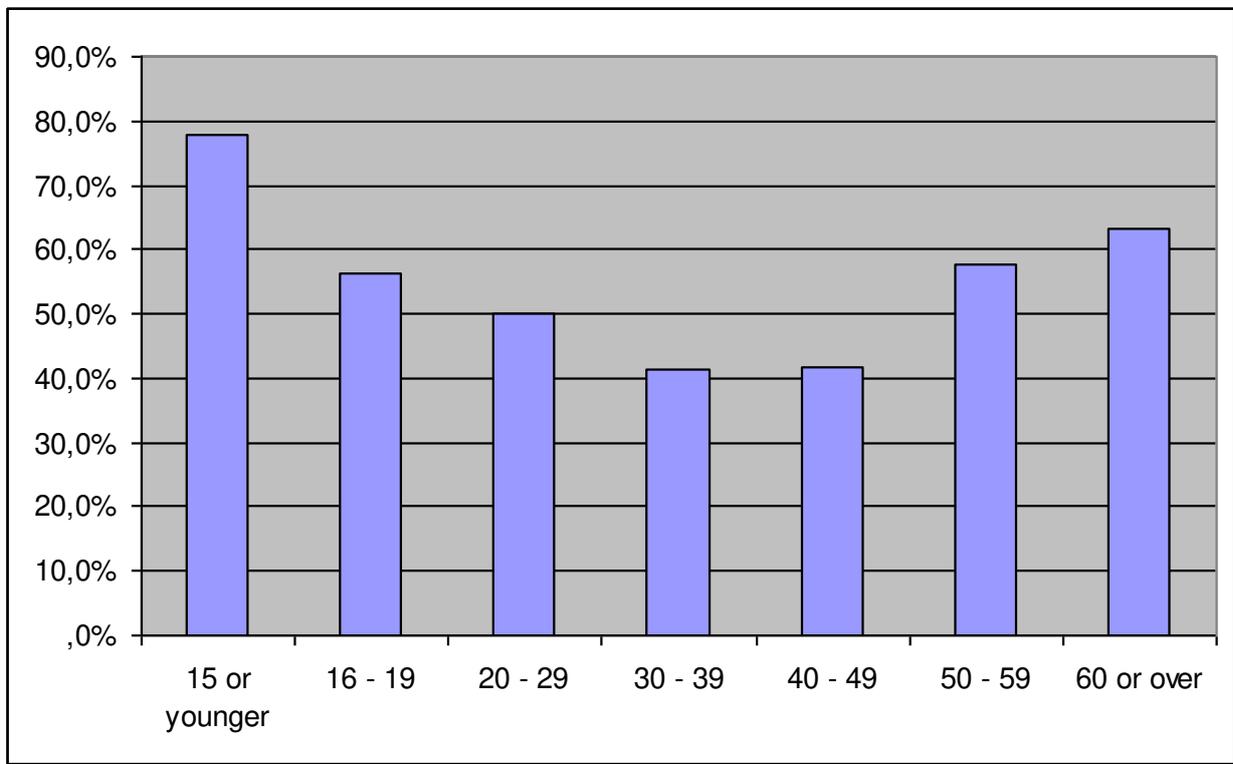
*Cultural image of Sibiu by occupation (% agree)*



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.

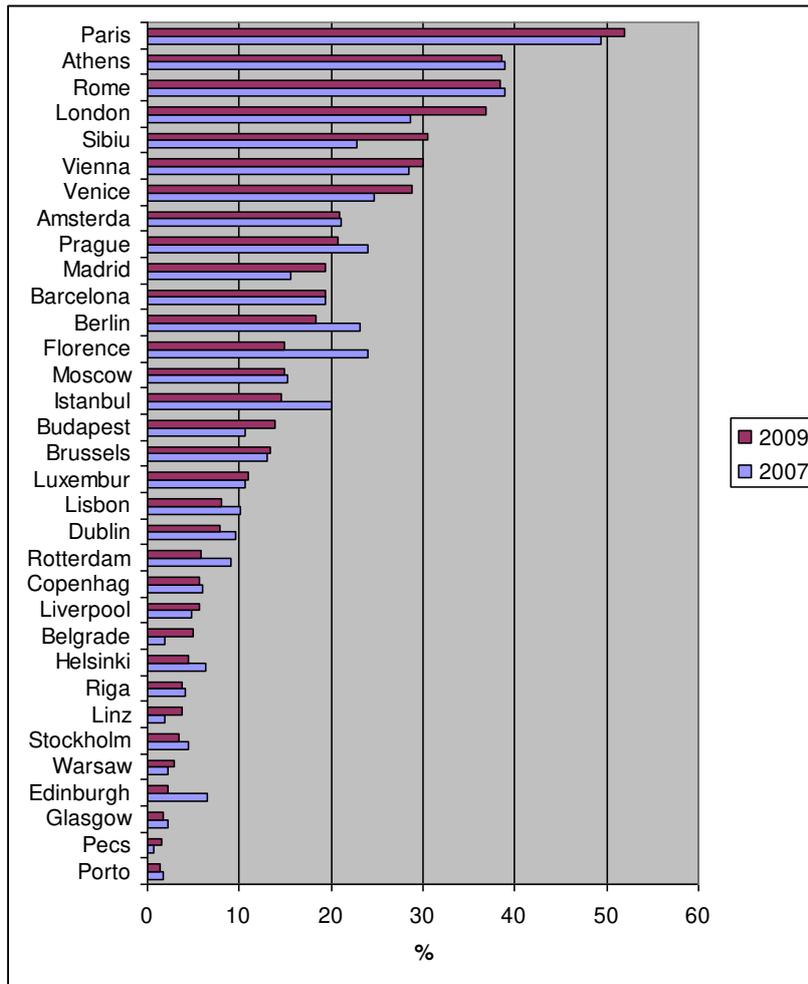
This may indicate that Sibiu does not cater as well in terms of events for those with young families as it does for other groups.

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



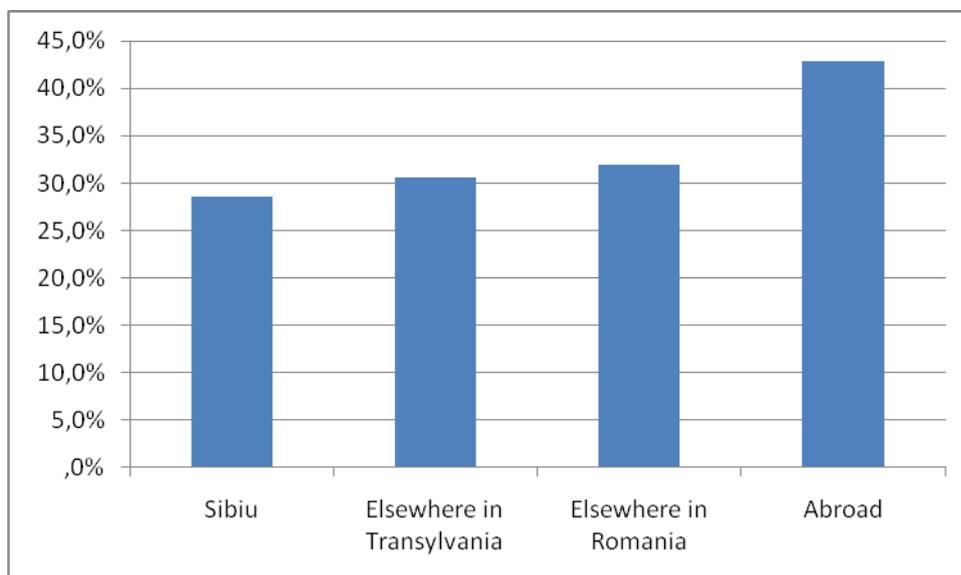
The image of Sibiu relative to other cultural destinations in Europe has also improved, reflecting the increased quality of the tourism offer. The relatively high scores for Sibiu as a cultural destination are of course caused mainly by Romanian respondents – Sibiu tends to score lower among foreign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

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



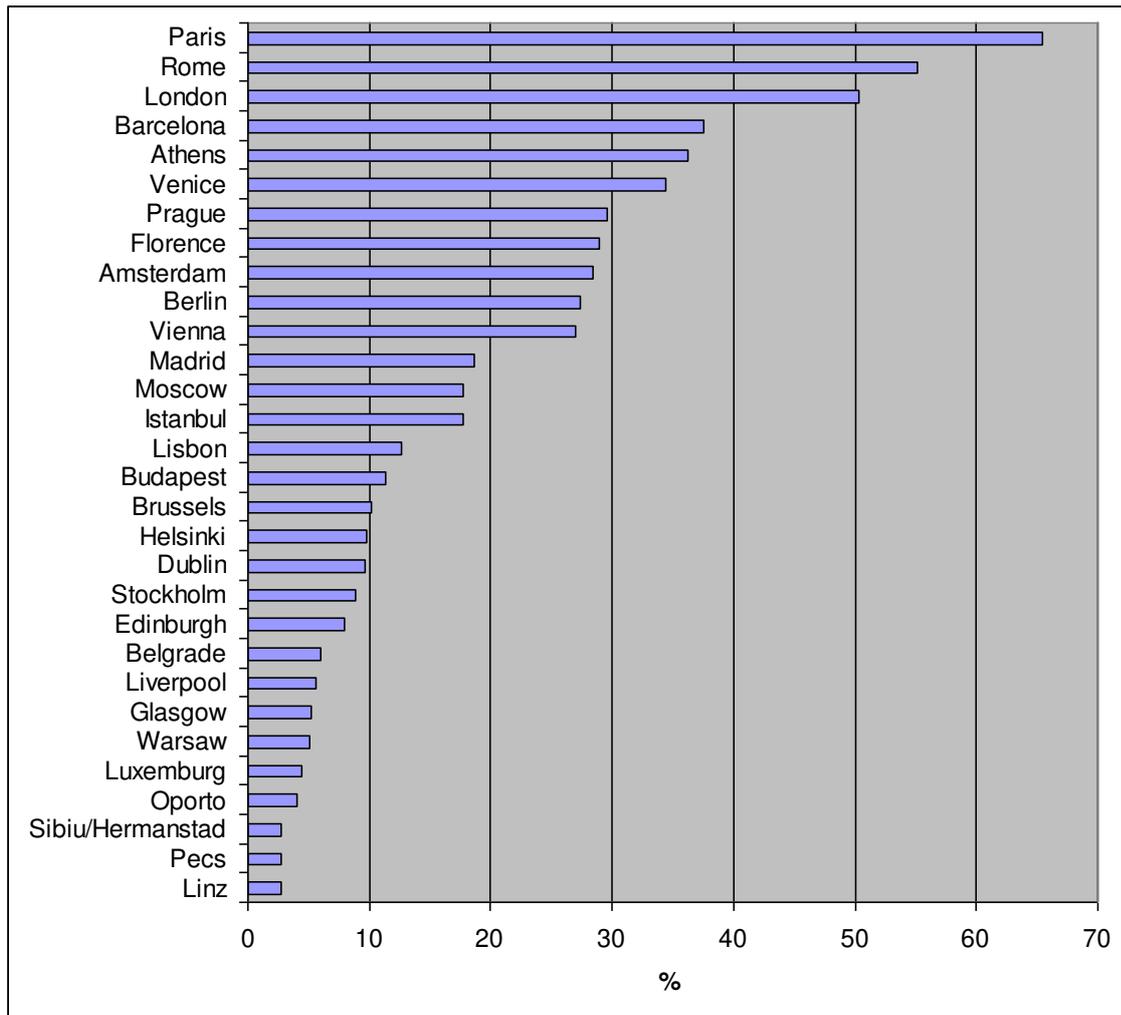
Visitors from abroad were most likely to see Sibiu as a top cultural destination relative to other European cities, and the proportion of visitors listing Sibiu among the top 5 increased slightly in 2010. The proportion of local residents ranking Sibiu in the top 5 was lower, but still recorded a slight increase in 2010 compared with 2009.

*Sibiu as one of the five top destinations by visitor origin 2010*



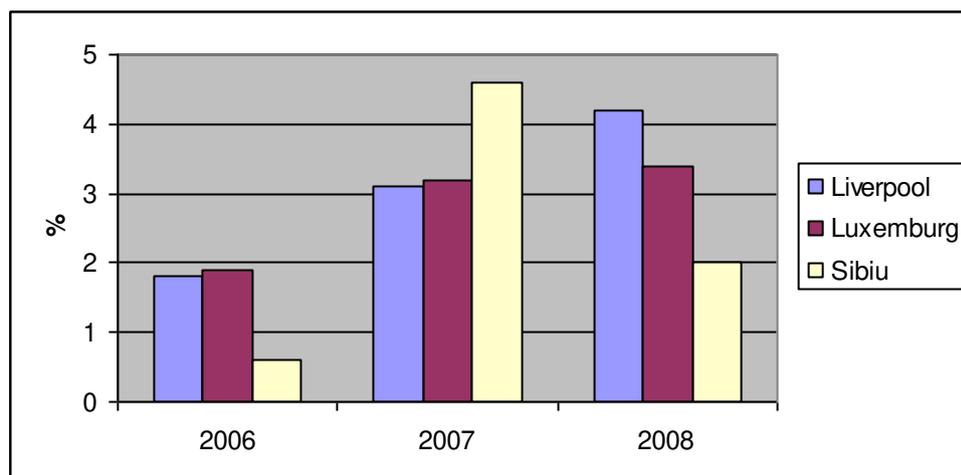
For the ATLAS surveys conducted in other parts of Europe, Sibiu of course scores much lower, as many people outside Romania will not even have heard of the city. In this light, the fact that Sibiu received as many votes as Linz (cultural capital in 2009) and Pecs (Cultural capital in 2010) in 2008 can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

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 03.00. 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 over 670,000, but there was a slight decline in 2010, mainly due to falling attendances at the ASTRA Museum.

#### *Visits to the main museums in Sibiu, 2009 and 2010*

Museum	Visitor numbers 2009	Visitor numbers 2010
Muzeul National Brukenthal	366410	372731
CNM ASTRA	297190	230504
Icons on glass Muzeum , Sibiel	12730	No data
Total	676330	604235

Over the longer term, the official statistics on cultural performances and visits in Sibiu County as a whole show that the supply of cultural events has grown significantly since 2001. The total number of cultural events grew by almost a third to 2009 and the number of spectators by 11%. Visits to museums grew by 200% over the same period.

*Visits to cultural attractions in Sibiu county according to official statistics*

Total county	2001	2002	2005	2006	2007	2008	2009
show and concerts total no	699	541	671	774	715 <sup>1</sup>	1208	924
drama shows	323	215	192	216	218	598	285
puppets shows	200	164	238	260	131	277	315
folk shows	97	95	152	216	268	252	248
philharmonic concerts	79	67	89	82	98	81	76
spectators <sup>2</sup>	397571	157248	331652	597291	117333	788223	441285
drama shows	320700	68000	101320	486559	43030	688729	342550
puppets shows	11567	20966	32979	6395	16374	61309	62000
folk shows	57337	60253	180000	30000	38900	20000	19600
philharmonic concerts	7967	8029	17353	16777	19029	18185	17135
museums	284513	240083	334991	329357	708854	625698	879486

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 was some recovery in 2009, but as predicted in the previous report (Richards and Rotariu, 2010) the number of events has continued to fall as a result of the economic crisis and cuts in funding and sponsorship.

<sup>1</sup> These statistics were reported by professionals. For the ECOC many amateurs and other actors were involved and counted like university, ATLAS etc. . No data for the other years

<sup>2</sup> Based on ticket sales

*Cultural events in Sibiu, 2007-2010 according to listings on the Municipality website*

Month	2007 Number of events	2008 Number of events	2009 Number of events	2010 Number of events
January	56	22	37	5
February	56	38	53	9
March	100	54	70	20
April	92	38	63	16
May	166	53	67	30
June	145	53	53	28
July	158	11	66	30
August	368	9	45	19
September	165	4	15	10
October	81	4	26	19
November	33	4	20	31
December	27	7	22	22
Total	1447	297	537	239

**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 up to 2009. In 2010 the rate of growth slowed as a number of airlines cut flights in response to the crisis.

*Passengers and flights to Sibiu airport*

Year	Passengers	Fights
2006	73,103	3,820
2007	112,077	5,014
2008	165,057	5,995
2009	221,361	6,419
2010	225,720	5,975

## Impacts on major stakeholders

In order to gauge the impact of the event on the stakeholders in and around Sibiu, depth interviews were held in 2009 and 2010 with representatives of a number of major stakeholder groups.

A total of 170 interviews were completed with stakeholders, the vast majority in Sibiu and the surrounding region. However, a number of interviews were also held in the rest of Romania. The main interview groups were: cultural operators, 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.
5. The impact of events in the city and the direction of events policy.

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	
Cultural operator	CO
Travel agents, tour operators, hotels	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 has a good image because of its history and medieval atmosphere that persist 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 from Sibiu and attended many events held in 2007 in Sibiu and I was 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

The fact that the economic impacts had extended beyond 2007 and had helped to mitigate the effects of the subsequent economic crisis were evident from the fact that even in 2010 the economic effects of the ECOC were still seen as very important:

The fact that in 2007 became the cultural capital Sibiu received numerous amounts of money to revamp the city and what events led to the economy. Also the large number of tourists who hosted Sibiu from 2007 to today has helped to increase both the city budget, and the hotels. SC

### *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

Social impact and cultural impact is very much tied together. Social impact creates a more open mentality, closer to cities in western Europe. Maybe time to create a greater social diversity of people, and foreigners can and can help us move beyond the differences between nationalities: Romanian / Hungarian, Romanian / Gypsies, Romans / Saxons. SC

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 appreciate 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

Sibiu should specialize as a historical, cultural city, and be in competition with other cities in Europe. The events and cultural activities have resulted in significant gains in the community, improved cultural infrastructure and general development of partnerships with other cities / regions in Europe and promoting European cultural cooperation.

### *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.

### *Cultural events*

Almost all the interviewees were positive about the impact of events in the city and were keen to see the policy of organizing events extended in the future. The impact of the ECOC in 2007 was taken as a reference point for future development, particularly as many noted the relative decrease in event activity since 2007.

Currently the events that are staged tend to be concentrated in the summer months, which reduces their effectiveness as a generator of economic benefits due to seasonality. There was also criticism of the marketing activities for events, which many respondents felt could be much better organized. The majority of respondents felt that the Municipality should take charge of the events policy and marketing activities. Some also mentioned that there should be some kind of quality control to maintain the standard of the cultural programme.

Events were also seen as an appropriate vehicle for achieving other policy aims, such as cultural development and social cohesion, even by economic operators:

The events cultural activities have resulted in significant gains in the community, improved cultural infrastructure and general development of partnerships with other cities / regions in Europe and promoting European cultural cooperation. STA

Cultural events in particular were seen as a way of maintaining the distinctive nature of the city in a globalizing world:

The city has been recognized by the title of European Capital of Culture and this has created an upsurge in thematic events that fit into its history and tradition but still enough to "exotic" for Europe. STA

Some interviewees also mentioned the success of SIBIU BAROC UPDATE, a project developed with European funds in cooperation with the City of Sibiu. Such programmes have helped to maintain the organizational expertise in events that was developed in 2007:

Another benefit would be experience which we acquired after organizing a programme in the ECOC. Cultural operators will choose Sibiu as a future partner in their project development. Through this programme, Sibiu cultural operators will experience a program of international stature, will gain a broader experience in terms of cultural management. Thus in the coming years Sibiu will use this experience to create high-class cultural events and high visibility on the European and international level. CO

In general, the stakeholders felt that the positioning of Sibiu as a City of Events could be a very positive move for the future. Not only has the ECOC had a significant effect on the economy and image of the city, but it has also helped Sibiu to develop in cultural and social terms. A well-designed events programme could help the city to maintain the benefits gained in 2007 and to increase its cultural distinctiveness.

### *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 ECOOC 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 ECOOC, 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 ECOOC, as they generally saw that the success of Sibiu had reflected on Romania as a whole.

In terms of the events policy of the city, respondents were positive about the development of cultural events, but felt that more coordination and marketing were necessary to achieve maximum benefits. There was a feeling that the events programme in the summer is currently too crowded, and that benefits could be obtained by spreading events and creative more activity in summer. One of the direct benefits of the ECOOC in the longer term has been the development of the necessary capacity to organize events, which makes Sibiu more attractive as a location for cultural event activity.

## 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 up to 2010. 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 and by continued impact of foreign press reports on visitors.

The stakeholder interviews also reveal that many businesses benefited from the ECOC not only in 2007, but also in the period to 2010. 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 four 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.

## **Conclusions: the long term impact of culture-led regeneration in Sibiu**

The actions of the City of Sibiu over the past decade form an interesting case study of culture-led regeneration, drawing heavily on a 'mega-event' as a source of cultural, social and economic dynamism.

For the ECOC itself, it is clear that the event transformed the cultural and economic landscape of the city. The relatively small-scale, specialized cultural events staged between 2001 and 2006, such as the ASTRA film festival and the Jazz Festival, tended to attract a relatively select audience. The ECOC had the effect of broadening the local, regional, national and international audiences attracted to cultural events in Sibiu. This was mainly due to the brand value of the ECOC, the opening towards Europe represented by the event, and the extensive cultural programme that was constructed.

The broadening of the cultural audience and attraction of relatively upmarket cultural tourists had an important economic impact on the city. There was considerable investment in hotel accommodation in Sibiu, most significantly from foreign hotel chains. This provided an upgrading of the tourism product and higher accommodation and tax revenues. In addition the quality and turnover of retail operations in Sibiu increased.

Perhaps most importantly, Sibiu was put on the map. The improved image of the city was most noticeable in 2007, but there is little sign of the image effect dying away altogether. The city continues to have a stronger image in the rest of Europe than before the ECOC. This has helped the development of tourism, particularly high-spending cultural tourists from abroad. 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 afterwards. The impact of the economic crisis has tended to obscure the positive effects of the ECOC from mid-2009 onwards, but in 2010 visitor spending increased above ECOC levels for the first time.

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 interviews also indicate that there is considerable support for continuing a policy of culture-led regeneration, and for initiatives in developing new cultural events.

Even though the city has not been able to maintain the production of cultural events at the same level as during the ECOC, there is evidence that the basic cultural infrastructure and orgware of the city is stronger than before the ECOC. Sibiu has evidently learned a lot from the ECOC experience and is able to use this experience to support a more cosmopolitan and international cultural offer.

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. Interview respondents were generally of the opinion that this direction needs to be continued, with a more focused marketing effort coordinated by the municipality.

Looking toward the future, it seems that there is a great deal of support among local stakeholders for a development of an integrated events policy with strengthens the relationship between the city and her events. In undertaking this policy, thought needs to be given as to how

Sibiu can become a truly 'Eventful City' (Richards and Palmer, 2010) and make use of the cultural assets at her disposal to support events, and to use events to support the aims of the city. This requires a clear overall vision of what the city wishes to achieve with its event programme, and how best to organize the programme in order to involve a wide range of stakeholders and produce more benefits.

Perhaps most importantly the experience of Sibiu underlines the fact that cultural events are far more than simply dates in a cultural calendar, They are important meeting spaces for the inhabitants and visitors in the city, which can allow cultural contacts and creativity to flourish. The creative atmosphere supported by events is clearly something that was experienced by all concerned in 2007, and it is important to conserve this as a catalyst for the future development of the city as well. In this way Sibiu can not only establish itself as an important hub of European culture, but can also underline its own distinctive contribution to the past, present and future of Europe.

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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?**

- previous visit
- family, friends
- TV/radio
- tourist office
- Sibiu website
- Other website
- Sibiu brochure
- newspaper/magazine
- tour operator brochures
- guide book

**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)?:**

- Museum
- Theme park
- Theatre
- Opera
- Sports match
- Musical
- Film
- Pop concert
- Cultural festival

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

- Thalia Hall                       National Theatre Radu Stanca  
 Bruckenthal Museum  ASTRA Museum  
 Evangelic Church       Orthodox Cathedral  
 The Lower town       The Fortifications  
 Fortified churches around Sibiu  
 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)**

- sun/beach holiday       countryside recreation  
 touring holiday       mountain recreation  
 city break               health/sport orientated  
 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 Sibiu County

Comparing the data from available sources the differences between them are significant.

	2005	2006	2006	2007	2007	2009	2009	2009	2009	2010	2010
	statistics	statistics	licensed	statistics	licensed	statistics	AJTS	licensed	inventory	statistics	estimated
<b>total county</b>											
units	111	120	273	137	359	172	481	335	518	167	496
rooms			2315		3057		5039	3335	5417		<b>4663</b>
places			7399		6352	6013	12083	8983	12893	6538	<b>9761</b>
average places/room			3.20		2.08		2.40	2.69	2.38		<b>2.09</b>
average places/unit			27.10		17.69		25.12	26.81	24.89		<b>19.68</b>
<b>sibiu town</b>											
units			62		82		162	108	148	48	147
rooms			1029		1321		2284		2284		2134
places			3756		2453		4633	3785	4584	3144	4090
average places/room			3.65		1.86		2.03		2.01		1.92
average places/unit			60.58		29.91		28.60	35.05	30.97		27.82
<b>around sibiu</b>											
units			170		221		189	no data	189		274
rooms			852		1305		1289		2284		1797
places			2199		2487		3919		4663		3905
average places/room			2.58		1.91		3.04		2.04		2.17
<b>sibiu and sourroundings</b>											
units			232		303		351	no data			421
rooms			1881		2626		3573		4568		3931
places			5955		4940		8552		9247		7995
<b>other locations</b>											
units			41		56		130	no data			75
rooms			434		431		1466		849		732
places			1444		1412		3531		3646		1766
<b>% of sibiu in county</b>											
units			44.45		43.21			0.00	28.57		29.64
Places			50.76		38.62			42.14	35.55		41.90

Hotel statistics present considerable problems of analysis, because of different categorizations and a lack of coverage of certain types of accommodation. This might be the strongest challenge for the near future for the management of the destination: to provide clear and truthful statistics from several sources to enable comparison and control. Since 2007 several attempts were made to determine the accommodation capacity of the town and the county. The data sources were: official statistics, Romanian Ministry for Tourism, The County Tourism Association (AJTS), official data of County Council and Sibiu Mayor House. The centralized results are presented above.

The table above was calculated according different data sources in order to have a picture of the evolution of the accommodation capacity in the county, in Sibiu and Sibiu neighborhood.

The official statistics are shown above. All figures show the major trends:

- Increase of capacity
- Increase of high level of comfort units
- A faster increase of investments in neighbourhood of Sibiu comparing to the town
- An trend of enlargement and development and improve of comfort of existing capacities
- A relatively slow increase in 2010

Comments:

The surroundings of Sibiu reacted sooner to the ECOC than the city, and the growth here was seen in 2007 while the city grew in 2008. We have included in the Sibiu region the villages and towns within 30 km of the city.

### The growth of accommodation capacity in Sibiu county and town according to Directia de Statistica Sibiu

Sibiu county	2007	2008	2009	2010	2007	2008	2009	2010
	Units				places			
<b>Total</b>	137	152	172	167	5123	5265	6013	6538
<b>Hotels</b>	22	22	28	34	2305	2161	2473	3348
<b>Hotels for youth</b>	2	2	2	1	135	135	135	100
<b>Hostels</b>	1	1	1	:	12	12	12	:
<b>Motels</b>	9	9	7	7	258	265	197	197
<b>Villas</b>	6	6	6	5	266	266	263	233
<b>Challets</b>	7	7	8	7	228	228	366	340
<b>Hunting challes</b>	3	3	3	2	30	30	30	18
<b>Bungallows</b>	1	:	:	1	8	:	:	28

<b>Campings</b>	1	1	1	:	120	120	120	:
<b>Massissonettes</b>	3	3	3	1	82	82	112	60
<b>Pupils camps</b>	7	7	7	7	560	570	590	590
<b>Touristic pensions</b>	24	28	32	29	485	589	580	581
<b>Agroturistic pensions</b>	<b>51</b>	<b>63</b>	74	73	<b>634</b>	<b>807</b>	1135	1043

**Sibiu town**

	2005	2006	2007	2008	2009	2010	2006	2006	2007	2008	2009	2010
	<b>Units</b>						<b>places</b>					
<b>Total</b>	33	33	39	40	48	48	2091	1932	2345	2218	2430	3144
<b>Hotels</b>	12	13	14	13	16	20	1394	1392	1651	1451	1600	2369
<b>Hotels for youth</b>	1	1	2	2	2	1	35	35	135	135	135	100
<b>Hostels</b>												
<b>Motels</b>	2	2	2	2	1	1						
<b>Villas</b>	2	1	1	1	1	1	49	37	37	37	45	45
<b>Challets</b>												
<b>Hunting challes</b>												
<b>Bungallows</b>	<b>1</b>	<b>1</b>	1	:	:	:	22	8	8	:	:	:
<b>Campings</b>	1	:					174	-				
<b>Massissonettes</b>												
<b>Pupils camps</b>	2	2	1	1	1	1	100	110	60	60	60	60
<b>Touristic pensions</b>	12	12	17	20	26	24	241	256	362	441	512	512
<b>Agroturistic pensions</b>	-	1	<b>1</b>	<b>1</b>	1	:	-	18	<b>18</b>	<b>20</b>	20	:

According to the Tourism Ministry data in 2006 there were 2315 rooms in the county with 7399 places (3,2 places / room) and in 2007 3056 rooms with 9130 places (2,99 places / room) and 4354 units with 11882 places (2,96 places / room). These figures are unreliable and a real research must be organized to clear this situation. For 2010 we cannot use these data as large numbers of units are missing because of expired licenses. We can detect a constant trend towards increasing comfort levels from the decreasing number of places per room.

The town had 1029 room with 3756 places (3, 65 places / room) in 2006, 1322 units with 4493 places (3.4 places / room) in 2007 and 2062 units with 6106 places (2.96 places / room) in 2009 and in 2010 (recalculated by us) 2143 rooms with 4090 places (1.93 places /room) that shows that the increase in comfort was much stronger in the town, maybe as a consequence of the new brand hotels. That means an increase in 2007 compared with 2006 of 32% for rooms and 23,4% for places, and for 2009 compared with 2006 100% growth in rooms and 69% in places, and for 2010 compared with 2006 of 108 % in rooms – but places are not comparable. The number of units has risen by 45.5% from 2006 to 2010. In spite of brand hotels arriving in Sibiu the smaller units have grew faster and are satisfying a market need, which also shown by the decreased percentage of tourists staying with relatives compared with 2002 – 2005 when the offer was mainly of hotels with high prices.

### Appendix 3: Tourist flows in 2010 Sibiu County and town

The tourist overnights for the whole county in 2010 as per official statistics are<sup>3</sup>:

Type of accommodation unit	Total	5*	4*	3*	2*	1*	unclassified
<b>TOTAL county</b>	399576	29065	118166	169422	54943	6011	21969
R	292597	22723	72516	119434	50672	5559	21693
S	106979	6342	45650	49988	4271	452	276
<b>HOTELS</b>							
T	300689	24331	103669	147308	24085	1296	0
R	202477	18315	60704	100519	21822	1117	0
S	98212	6016	42965	46789	2263	179	0
<b>HOSTELS</b>							
T	5604	0	0	0	516	0	5088
R	5528	0	0	0	440	0	5088
S	76	0	0	0	76	0	0
<b>MOTELS</b>							
T	10517	0	0	0	10493	24	0
R	9214	0	0	0	9190	24	0
S	1303	0	0	0	1303	0	0
<b>Villas</b>							
T	24399	0	0	10816	12664	919	0
R	22429	0	0	8880	12664	885	0
S	1970	0	0	1936	0	34	0
<b>CHALETs</b>							
T	9282	0	0	3306	289	2830	2857
R	8209	0	0	2743	289	2596	2581
S	1073	0	0	563	0	234	276
<b>URBAN TOURISTIC PENSIONS</b>							
T	10868	0	1056	5655	3538	619	0
R	9899	0	990	5033	3262	614	0
S	969	0	66	622	276	5	0
<b>RURAL AND AGROTOURISTIC PENSIONS</b>							
T	23617	4734	13441	2337	2782	323	0
R	20273	4408	10822	2259	2461	323	0
S	3344	326	2619	78	321	0	0
<b>BUNGALOWS</b>							
T	576	0	0	0	576	0	0
R	544	0	0	0	544	0	0
S	32	0	0	0	32	0	0
<b>PUPILS CAMPS</b>							
TOTAL	14024	0	0	0	0	0	14024

<sup>3</sup> Data for 2010 not available when printing

T	14024	0	0	0	0	0	14024
R	0						
<b>SIBIU TOWN</b>							
T	261743	24331	94541	121605	19846	1420	0
R	170305	18315	53764	78825	18124	1277	0
S	91438	6016	40777	42780	1722	143	0
<b>HOTELS</b>							
T	239680	24331	93969	106147	14432	801	0
R	151243	18315	53258	65891	13116	663	0
S	88437	6016	40711	40256	1316	138	0
<b>HOSTELS</b>							
T	516	0	0	0	516	0	0
R	440	0	0	0	440	0	0
S	76	0	0	0	76	0	0
<b>MOTELS</b>							
T	2046	0	0	0	2046	0	0
R	1896	0	0	0	1896	0	0
S	150	0	0	0	150	0	0
<b>Villas</b>							
T	10008	0	0	10008	0	0	0
R	8106	0	0	8106	0	0	0
S	1902	0	0	1902	0	0	0
<b>URBAN TOURISTIC PENSIONS</b>							
T	9493	0	572	5450	2852	619	0
R	8620	0	506	4828	2672	614	0
S	873	0	66	622	180	5	0

Note: for tourist pensions the clasification onf flowers was asimilated with the one on stars

Type of accommodation unit	average overnights						
	Total	5*	4*	3*	2*	1*	unclassified
<b>TOTAL county</b>	1.8	1.8	1.6	1.7	1.8	2.0	3.2
R	1.8	1.7	1.6	1.7	1.8	2.1	3.2
S	1.7	1.9	1.6	1.9	1.5	1.5	1.3
<b>HOTELS</b>							
T	1.6	1.7	1.5	1.7	1.4	1.6	
R	1.6	1.6	1.5	1.7	1.3	1.7	
S	1.7	1.8	1.6	1.9	1.5	1.5	
<b>HOSTELS</b>							
T	3.3				2.0		3.5
R	3.3				2.0		3.5
S	2.2				2.2		
<b>MOTELS</b>							

T	1.4				1.4	2.0	
R	1.4				1.4	2.0	
S	1.4				1.4		
Villas							
T	2.7			1.4		1.6	
R	2.8			1.4		1.6	
S	1.7			1.8		1.2	
CHALETS							
T	2.0			1.9	2.1	2.3	1.9
R	2.1			1.9	2.0	2.4	1.9
S	1.6			1.8		1.6	1.3
URBAN TOURISTIC PENSIONS							
T	2.1		1.8	2.2	2.0	2.4	
R	2.1		1.8	2.2	1.9	2.4	
S	2.2		1.7	2.3	2.1	1.0	
RURAL AND AGROTOURISTIC PENSIONS							
T	2.5	2.3	3.0	2.0	1.8	2.4	
R	2.5	2.3	3.0	2.0	1.9	2.4	
S	2.6	2.7	3.0	1.8	1.5		
BUNGALOWS							
T	1.3				1.3		
R	1.4				1.4		
S	1.0				1.0		
PUPILS CAMPS							
TOTAL	3.6						3.6
T	3.6						3.6
R							
<b>SIBIU TOWN</b>							
T	1.6	1.7	1.5	1.7	1.3	2.2	
R	1.5	1.6	1.4	1.6	1.3	2.2	
S	1.7	1.8	1.6	1.9	1.6	1.7	
HOTELS							
T	1.6	1.7	1.5	1.7	1.2	2.0	
R	1.5	1.6	1.4	1.7	1.2	2.1	
S	1.7	1.8	1.6	1.9	1.7	1.8	
HOSTELS							
T	2.0				2.0		
R	2.0				2.0		
S	2.2				2.2		
MOTELS							
T	1.1				1.1		
R	1.1				1.1		
S	1.0				1.0		
Villas							
T	1.4			1.4			

R	1.3			1.3			
S	1.8			1.8			
URBAN TOURISTIC PENSIONS							
T	2.1		1.7	2.2	1.9	2.4	
R	2.1		1.7	2.2	1.9	2.4	
S	2.1		1.7	2.3	1.8	1.0	

\* ) Urban pensions were redefined as touristic pensions

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

\*\*\* 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. In 2010 34% of visitors stayed with friends and relatives with an average length of stay of almost 10 nights. On this basis we might estimate a minimum of 503800 overnights for the whole county.

Official tourist flows for Sibiu

	2007				2008				2009			
	arivals		overnights		arivals		overnights		arivals		overnights	
	total tourists	from which foreigners										
month	no	no										
1	8422	2443	15055	4368	8299	1978	11772	3213	6571	1767	8729	2241
2	9853	2344	15937	4629	9961	2280	13978	3622	5891	2083	7768	2573
3	12087	2878	20105	5712	10431	2456	13936	3540	8844	2711	11754	3454
4	12682	4833	21171	8259	11172	3656	15302	5845	7747	2884	10591	3934
5	15693	7050	27350	13597	16806	6005	24727	9145	13399	4899	18660	6578
6	16808	7782	27255	13429	12541	4361	18179	6705	13302	5086	17479	6515
7	20143	9398	30530	14847	12840	4672	19227	7035	11923	4677	16701	5896
8	20293	10999	29848	16847	14689	5955	20064	7852	13806	6265	18122	8155
9	17622	8434	27508	14016	16150	7220	21617	9751	10886	4907	16514	6489
10	17882	6490	26867	10453	14560	4278	19124	5721	10941	3575	14273	4519
11	14936	4197	22582	6922	12103	2466	16367	3109	8923	1851	12046	2326
12	12161	2586	16785	4091	7448	1938	9712	2392	8140	1424	11644	1956
<b>total</b>	<b>178582</b>	<b>69434</b>	<b>280993</b>	<b>117170</b>	<b>147000</b>	<b>47265</b>	<b>204005</b>	<b>67930</b>	<b>120373</b>	<b>42129</b>	<b>164281</b>	<b>54636</b>

	2010					2007	2008	2009	2010	2007	2008	2009	2010
	arivals		overnights			medium overnight							
	total tourists	from which foreigners	total tourists	from which foreigners		total tourists				foreigners			
month	no	no	no	no	month								
1	8582	1453	12836	2504	1	1.79	1.42	1.33	1.50	1.79	1.62	1.27	1.72
2	9609	1869	13168	3106	2	1.62	1.40	1.32	1.37	1.97	1.59	1.24	1.66
3	8634	2381	13226	4286	3	1.66	1.34	1.33	1.53	1.98	1.44	1.27	1.80
4	12172	3679	18743	6033	4	1.67	1.37	1.37	1.54	1.71	1.60	1.36	1.64
5	14897	6096	24791	10551	5	1.74	1.47	1.39	1.66	1.93	1.52	1.34	1.73
6	11828	5159	20586	9660	6	1.62	1.45	1.31	1.74	1.73	1.54	1.28	1.87
7	13636	6636	22371	10799	7	1.52	1.50	1.40	1.64	1.58	1.51	1.26	1.63
8	14121	6945	23661	11755	8	1.47	1.37	1.31	1.68	1.53	1.32	1.30	1.69
9	17258	8493	28810	14805	9	1.56	1.34	1.52	1.67	1.66	1.35	1.32	1.74
10	14100	4366	23308	7830	10	1.50	1.31	1.30	1.65	1.61	1.34	1.26	1.79
11	10240	2356	16693	4155	11	1.51	1.35	1.35	1.63	1.65	1.26	1.26	1.76
12	8762	1557	15367	2705	12	1.38	1.30	1.43	1.75	1.58	1.23	1.37	1.74
<b>total</b>	<b>143839</b>	<b>50990</b>	<b>233560</b>	<b>88189</b>	<b>total</b>	<b>1.57</b>	<b>1.39</b>	<b>1.36</b>	<b>1.62</b>	<b>1.69</b>	<b>1.44</b>	<b>1.30</b>	<b>1.73</b>

## Note

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 the ECOC 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 great 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 sorted by months, by location, by type of accommodation etc. But the composition of the sample must be taken into consideration. Such an analysis might be a basis 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 applies to Romanian markets. But these data show no qualitative information, such as: motivation, source of information, tourist consumption etc. Field research is therefore necessary, and a mix of quantitative and qualitative research might be particularly valuable.

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 coach. Off season (the only foreigners were the Soviet groups that were on their way to their relatives on Hungary, Czechoslovakia or GDR) started November 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 investigations are required to analyze this situation

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 only 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 at the ground, which is bad for tourists as a 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 in sales.

As regards souvenirs and retailing there is no information, so no advice can be reliably offered. The only field researches were carried out by in 2007 by ATLAS and the Romanian Ministry of Culture, and the current survey. An estimation of the tourism economy according to TSA or based on direct observation would be advisable.

A special research and plan must be drawn up for an integrated development of events (conferences, business, coaching etc.), tourism and cultural events. The town should enlarge the offer to include 2-4 hours trips in neighborhoods (Cristian – Sibiel / Cisnadioara – Sadu I), connected to local events and integrate these into the event programme either for having dinner or lunch during the event. Special programmes might be developed for before or after event trips. Branding should be an integral part of this strategy.

It seems that tourism in Sibiu should also start working for leisure. Currently there is no inventory of leisure activities in Sibiu or for activities connected to tourism such as restaurants, bars, do it yourself activities, sport, etc. etc. Research is in progress with Master students of the faculty for Economic Studies of the ULBS.

## Appendix 4: events and visits statistics

*Cultural events in Sibiu, 2007-2010 according to Mayor House's site*

Month	2007 Number of events	2008 Number of events	2009 Number of events	2010 Number of events
January	56	22	37	5
February	56	38	53	9
March	100	54	70	20
April	92	38	63	16
May	166	53	67	30
June	145	53	53	28
July	158	11	66	30
August	368	9	45	19
September	165	4	15	10
October	81	4	26	19
November	33	4	20	31
December	27	7	22	22
<b>Total</b>	<b>1447</b>	<b>297</b>	<b>537</b>	<b>239</b>

*Visits to museums in Sibiu, 2009 -2010*

<b>Museum</b>	<b>Visitor numbers 2009</b>	<b>Visitor 2010</b>
Muzeul National Brukenthal	366410	372731
CNM ASTRA	297190	230504
<b>TOTAL SIBIU</b>	<b>663600</b>	<b>603235</b>
Icons on glass Muzeum , Sibiel	12730	?
<b>TOTAL</b>	<b>676330</b>	<b>604235</b>

Data collected direct from the museums

Shows and visitor of museums according to statistics – total county 2001 -2009

	2001	2004	2006	2007	2008	2009
Total shows	699	663	774	715	1208	924
theatres	323	175	216	218	598	285
Puppet theatre	200	232	260	131	277	315
Entertainment shows	97	146	216	268	252	248
Philharmonic show	79	80	82	98	81	76
Total visitors	397571	212098	597291	117333	788223	441285
theatres	320700	77984	486559	43030	688729	342550
Puppet theatre	11567	22960	63955	16374	61309	62000
Entertainment shows	57337	100000	30000	38900	20000	19600
Philharmonic show	7967	11154	16777	19029	18185	17135
Museums visitors	284513	257256	329357	708854	625698	879486

Sibiu, Direction for Statistics

### Infrastructure

	2001	2004	2006	2007	2008	2009
Sibiu						
Street km	290	290	317	318	318	318
Modernised km	173	243	265	266	280	282
Water supply km			890.4?	328.9	335.1	335.1
canalisation			257.2	318.6	325.3	325.3
Gas supply			335.9	321	337.5	339.6

### Comments:

1. Starting in 2007 the municipality approached the tourism industry as a partner. During 2007 the Sibiu 2007 ECOC provided logistical support for events and a special department was organized. Once its activity ceased an office for tourism was organized in the Municipality and several people were charged to carry on the promotion activities for Sibiu and to boost tourism arrivals. Until now their main activity was aimed at international tourism, even though domestic arrivals are 65% of the market, according to official statistics. 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 playing the role of a DMO and in spite of the existence of several local tourism associations<sup>4</sup> there is no framework for working together or for the exchange of information. In essence there is no organized cooperation, no common goals to achieve and few exchange of information except for participation in exhibitions. Plans for this matter are in progress and must be carried on. Local actors must be involved into decision making process in order to maximise the synergies.
2. As a result of the work of this department we have stopped analysing the typology of events according to criteria used for the ECOC in 2007. A proposal for the future might group events into 4 categories: A type: that ones that bring national and international image benefits and boost tourism; such events generate a large press reaction during and after event (that means more tourists and stronger image). 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 budgets. Such analyses should include the results of the ECOC survey.

<sup>4</sup> See <http://www.infotravelromania.ro/asociatii.html>