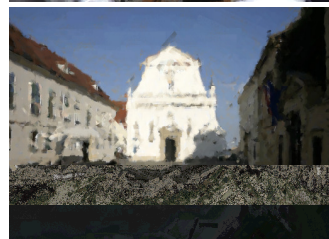
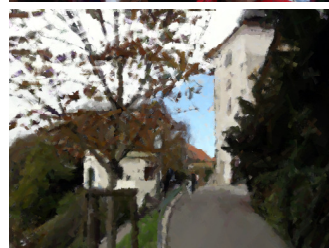
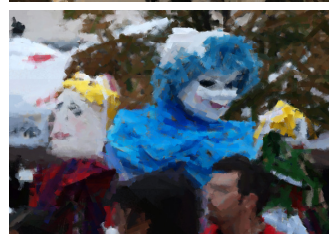
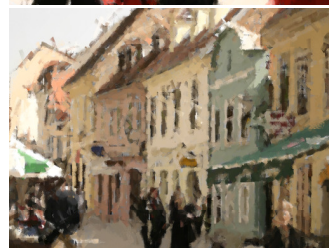


Turistička zajednica
grada Zagreba **Zagreb**
CROATIA



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PROCJENA TURISTIČKE POTROŠNJE U GRADU ZAGREBU U 2009. GODINI

Zagreb, studeni 2010.

Summary

Aim of study	<p>The Zagreb Tourist Board initiated in 2010 a study on the ASSESSMENT OF TOURISM CONSUMPTION IN ZAGREB IN 2009. The aim of the study is to determine the level of tourism activity in the city of Zagreb and to, further, broaden the information base needed for strategic decision making by the Zagreb Tourism Board and by tourism related businesses in the city.</p>
Methodological framework	<p>Total tourism consumption or expenditure realized in Zagreb is the result of number of visitors (tourists and one day visitors) and their average consumption.</p> <p>According to UNWTO definitions, tourism consumption in Zagreb is regional/destination tourism consumption made up of inbound (international and national) and domestic tourism expenditure.</p> <p>Inbound tourism expenditure is that which is realized by visitors who are not residents of the city of Zagreb. International inbound tourism expenditure is that which is realized in Zagreb by visitors who are residents of a foreign country. National inbound tourism expenditure is that which is realized in Zagreb by (domestic) visitors who are residents of other Croatian counties.</p> <p>Due to issues related to the perception of the usual environment, this study considers that there are no domestic expenditures.</p> <p>The principal limitation in assessing tourism consumption on regional/destination level is the issue of determining the precise number of visitors in a region, as there are no administrative instruments which enable the precise registration of visitor flows on a regional level.</p> <p>The assessment of tourism consumption in the city of Zagreb is based on the demand side and on the 'top-down' approach making it compatible with the assessment of tourism consumption on the macro level for Croatia as a whole.</p>
Data sources	<p>The inventory and assessment of available secondary data sources showed that additional analyses of the following relevant secondary sources can yield valuable information for the assessment of the size and structure of tourism demand, as well as for the assessment of level and structure of average tourism consumption of tourists and one day visitors:</p> <ul style="list-style-type: none"> • Survey on Attitudes and Expenditures of Tourists and Visitors in Zagreb – TOMAS Zagreb 2008 (Institute for Tourism) • Tourism Activity of Domestic Population in 2008 and 2009 (Institute for Tourism)

- Consumption of Foreign Visitors to Croatia in 2008 and 2009 (Croatian National Bank)
- Monthly data on domestic and foreign tourist arrivals and overnights in commercial accommodation (Croatian Bureau of Statistics)
- Quarterly data on hotels and restaurants turnover (Croatian Bureau of Statistics)
- Yearly data on travel agencies (Croatian Bureau of Statistics)

Additional primary research was conducted:

- Survey on Expenditures of Hotel Guests in Zagreb in 2010
- In-depth interviews with key stakeholders in the city's tourism sector with the goal of gaining a quality thorough understanding of the tourism demand and consumption characteristics in the period from 2008 to 2010.

Hotel and restaurant sector indicators in 2009

Key characteristics of the hotel and restaurant sector supply and demand in Zagreb:

- 577 thousand tourist arrivals in commercial accommodation, 10.4% less than in 2008
- 992 thousand overnights, 11.6% less than in 2008
- Foreign demand generates 73% of tourist arrivals and 74% of overnights
- Hotels are the leading accommodation type: 6,581 permanent beds, 503 thousand tourist arrivals, 845 thousand overnights
- 2.15 billion Kuna turnover (13.4% of total hospitality turnover in Croatia), 1.3% less than in 2008
- Hotels register 764 Kuna turnover per overnight which is 0.3% higher than in 2008
- More than half of hospitality turnover is realized by restaurants and bars (60%), followed by hotels registering 645 million Kuna turnover (30%)

Tourism demand and consumption from 2008 to 2010 (results of primary research)

Primary research: Survey on Expenditures of Hotel Guests in Zagreb in 2010 (comparison of May and June 2010 data with same period data in 2008)

- 20% lower average daily expenditure by hotel guests
- Increase of average daily expenditure by guests in lower category of accommodation (23% in two star hotels and 2% in three star hotels)
- Decrease of average daily expenditure by guests in higher category of accommodation (31% in hotels with four stars and 15% in hotels with five stars).

Primary research: In-depth interviews (selected conclusions)

- A decrease of tourism demand in 2009 and 2010 has not resulted in significant changes in demand structure as related to main demand segments
- The hotel sector has initiated price adjustment activities in the last quarter of 2009 and especially in 2010 as a response to decreasing demand
- Tourism agencies are focused on maintaining price/margin levels
- Zagreb is still not recognized as a city-break destination
- Lack of coordination between stakeholders in creating integral tourism products
- Inadequate supply and presentation of the city's cultural, entertainment, sports and recreational offer
- A significant quantitative and qualitative growth of private (household) accommodation
- Local demand generates a negligible share of total hotel overnights and revenues.

International inbound tourism expenditure in 2009
International inbound demand:

- 1.86 million arrivals, including one day visitors
- 0.83 million arrivals of one day visitors
- 1.02 million arrivals of international tourists, of whom 55.4% to non-commercial accommodation and 44.6 % to commercial accommodation
- 3.3 million overnights of international tourists, of which 75.5% in non-commercial accommodation and 24.5% in commercial accommodation.

International inbound tourism expenditure:

- 1.5 billion Kuna, of which 85% are expenditures by tourists and 15% are expenditures by one day visitors
- 431 million Kuna expenditure on accommodation (28% of total international inbound tourism expenditure), 294 million Kuna (19%) on food and beverage services, 339 million Kuna (22%) on shopping, 470 million Kuna (31%) on entertainment, culture, sports and other products and services
- 677 million Kuna are expenditures by hotel guests (44% of total tourism expenditures).

National (domestic) inbound tourism expenditure in 2009
National (domestic) inbound demand:

- 1.8 million arrivals, including one day visitors
 - 1.1 million arrivals of one day visitors
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- 679 thousand arrivals of domestic tourists, of whom 25% to commercial and 75% to non-commercial accommodation
- 1.9 million overnights of domestic tourists, of which 16% in commercial and 84% in non-commercial accommodation.

National (domestic) inbound tourism expenditure:

- 737 million Kuna, of which 69% are expenditures by tourists and 31% are expenditures by one day visitors
- 125 million Kuna expenditure on accommodation (17% of total domestic inbound tourism expenditure), 233 million Kuna (32%) on food and beverage services, 277 million Kuna (38%) on shopping, 102 million Kuna (14%) on entertainment, culture, sports and other products and services
- 285 million Kuna are expenditures by tourist staying in Zagreb with family and friends (39% of national inbound tourism expenditure).

Tourism consumption in Zagreb in 2009

Tourism consumption in Zagreb amounted in 2009 to 2.3 billion Kuna or 309 million Euro (4.1% of total tourism expenditures in Croatia in 2009), of which:

- 80% was realized by tourists and 20% by one day visitors
- 38% of total expenditure was realized by hotel guests, 31% by tourists visiting friends and relatives and 6% by tourists staying in their own houses or apartments
- 68% of total tourism expenditure was realized by international guests and 32% by domestic guests (51% of trips were realized by international guests and 49% were realized by domestic guests).

Structure of tourism consumption by types of products and services:

- 616 million Kuna (27% of total expenditure) for shopping
- 571 million (25%) for entertainment, culture, sports and other products and services
- 556 million Kuna (24.5%) on accommodation
- 527 million Kuna (23%) on food and beverage.

Average consumption per overnight:

- 201 Kuna by tourists staying in their own house or apartment
- 223 Kuna by tourists staying with friends or relatives
- 1,030 Kuna by tourists staying in hotels
- 233 Kuna by one day visitors.

Tourism consumption when augmented by expenditures realized by Zagreb residents on outbound trips within city limits amounts to 2.54 billion Kuna.

Recommendations

Recommendations for improved monitoring of tourism expenditure in Zagreb

- Continuous monitoring of tourism consumption levels
- Alignment of basic and controlling research with time periods for which tourism consumption is being assessed
- Assessment of data collection methods suitable in the research of private accommodation supply and demand
- Fostering systematic monitoring of different market segments, including school, sports, culture excursions and trips by children and teenagers, transit tourism trips through/on city fringes, etc.
- Encouraging the alignment of existing (and new) tourism consumption research with the needs posed by regional/destination level analyses.

Recommendations for establishing a system for monitoring the impacts of tourism on the city's economy

In addition to continuous monitoring of tourism consumption levels, it is recommendable to evaluate the possibility of determining direct and indirect impacts of tourism on the city's economy within the methods provided by the Tourism Satellite Account of Zagreb.

Recommendations for increasing tourism consumption

In addition to tourism marketing measures as an exceptionally important factor in increasing tourism consumption, following activities geared toward optimizing the experiential value spiral of a tourism visit to Zagreb can be recommended:

- Instituting the function of a destination management organization (especially in relation to information services for guests and service providers, as well as a networking service in developing specific products such as MICE, culture and city break tourism)
 - Adjusting the city's various tourism products to the specific needs of the highly segmented tourism market
 - Educating service providers and increasing their understanding of guest expectations, as well as of the importance of tourism in general.
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