

## EXECUTIVE SUMMARY

### TOMAS ZAGREB 2006 SURVEY

- Survey on attitudes and expenditures of tourists and visitors in Zagreb in 2006. Conducted for the fourth time (1998, 2003, 2005 and 2006) for the Zagreb Tourism Board.
- Survey covers almost all segments of visitors to Zagreb: tourists in hotels, hostels and private accommodation facilities, those visiting friends and relatives (VFR) and one-day visitors.

### Basic characteristics of tourism demand and accommodation facilities in Zagreb in 2006

- There were 1,018,549 tourists' overnights registered in Zagreb's commercial accommodation facilities in 2006 (65% of those realized in 1987). Number of tourists' overnights in Zagreb is growing at much higher rate than the overall number of tourists' overnights in Croatia (compound annual growth rate for the last six years is 9.4%).
- The leading foreign markets are: Germany, USA, Italy, Austria, Great Britain, France and Serbia and Montenegro. The highest growing markets in 2006 were Japan, Australia and USA.
- Almost 80% of all registered overnights are realized in hotels. There were 18.9% more overnights registered in hotels in 2006 in comparison to 2005.
- Hotels make about 55% of the overall Zagreb's accommodation capacity in number of beds. Zagreb has 37 hotels with almost 6 thousands beds in 3,386 rooms and 199 apartments. More than half of the hotel capacity is in five and four star hotels (57%).

## SURVEY RESULTS

### Socio- demographic profile

- By the country of origin, domestic tourists are the biggest market segment in private accommodation facilities (32%), in VFR segment (31%), among one-day visitors (34%) and in hotels (22%).
- In the VFR segment, tourists from Bosnia and Herzegovina, Slovenia, Austria, Italy and Serbia and Montenegro prevail among foreign tourists.
- In the day visitors market, visitors in transit and those coming from close, neighboring markets are dominant among foreign visitors.
- Zagreb visitors are mostly young or middle-aged. The visitor's age is ranging from the average of 23 in hostels to 40 in hotels.
- More than three quarters of hotel guests (76%) have college or university education.

### Motivation

- Primary motives for visiting Zagreb are business (32%), 'short city break' (30%), 'new experiences' (29%) and entertainment (27%).
- New experiences prevail among hostel guests, while those in private accommodation facilities or those on a day trip seek a short city break.
- Most visitors staying in VFR or for a day are repeat visitors as could be expected (70% and 54%, respectively, have been in Zagreb for six and more times), while, on the other hand, share of first-time visitors is high

in hostels (82%). Finally, hotels have about equal share of first-time visitors (33%) and very loyal ones (36%), reflecting again the preference of business segment for staying in hotels.

#### Sources of information

- The most important source of information was Internet. It was used by 67% hostel guests, 53% of tourists in private accommodation facilities, 43% hotel guests and 36% of day visitors.

#### Main travel characteristics

- The overwhelming majority of Zagreb visitors independently organize their visit to Zagreb, with hotels being an exception where about 29% of visitors used travel agent services.
- Most often Zagreb visitors came alone (39% hotel guests, 25% guests in private accommodation facilities, 51% VFR guests) followed by those coming with a partner (31% hotel guests and 41% guests in private accommodation facilities).
- Hotel and hostel guests most commonly arrive by air (46% and 32%, respectively). Car is mostly used by day visitors, VFRs and those staying in private accommodation facilities.

#### Main characteristics of stay in Zagreb

- Hotel guests stay, on average, 2 to 3 nights; hostel guests and VFRs slightly longer (4 and 5 nights, respectively), while those in private accommodation stay, on average, 10 nights. Day visitors, on average, stay in the city 7.4 hours.
- The city center attractions - the main Ban Jelačić square, down town, upper medieval town and the Cathedral are the most popular. Outside the city center the most popular are the recreational center Jarun, recreational park Maksimir and the Botanical garden close to the city center.
- Of the city museums and galleries the most visited are Mimara Museum, City of Zagreb Museum, Klovićevi Dvori Gallery and Arts and Crafts Museum. Museums are more frequently visited by those staying in private accommodation and hostels. However, almost every fourth hotel guest and every third VFR guest have shown no interest for visiting the museums.
- Visitors are frequently patronizing Zagreb's cafés, while from 61% to 87% of visitors, depending on a market segment they belong to, visit also Zagreb's restaurants.

#### Attitudes

- The majority of Zagreb's guests consider Zagreb suitable for a short break. Guests are also satisfied with picturesqueness of the town, tidiness, entertainment as well as with a range of cultural events.
- All Zagreb's visitors are highly satisfied with personal safety and hospitality of local residents and tourist information center staff.
- Guests are unsatisfied with the parking facilities, quality of the local/public transport, quality of tourist and traffic signage.
- Hotel guests are mostly unsatisfied with the quality of hotel accommodation as well as services in hotels. The exception is kindness of staff in accommodation establishment that was rated higher on average. All of the elements of accommodation establishments were rated significantly higher among 4 and 5 star hotels.

## Expenditures

- Average daily expenditure of hotel guests in Zagreb is estimated on 132 Euros per person, of which 53% or 70 Euros is spent on accommodation, followed by 23 Euros or 23% for food and drink in bars, cafés and restaurants and 14 Euros or 11% spent for shopping.
- Guests in private accommodation facilities spent on average 77 Euros per person per day, hostel guests spent on average 51 Euros, guests in VFR spent on average 62 Euros while day visitors spent on average 66 Euros per person.

## Tourism demand in Zagreb's hotels in 1998 - 2006 period

### TRENDS

- There is an increase of those motivated by the 'short city break', 'new experiences' and entertainment, on the expense of business travel that is decreasing.
- There is a growth of the first-time travelers as well as those coming to Zagreb with a partner.
- Increasingly, visitors arrive to Zagreb by plane.
- Use of travel agents in arranging visits to Zagreb is increasing.
- Visitors are increasingly satisfied with the elements of city infrastructure, while personal safety, Zagreb's picturesqueness and suitability for short break remain the best rated elements throughout the period.
- There was a slight decrease in the level of satisfaction with the quality of hotels and their services.
- As a consequence of the decrease in business travel, visitor's expenditure is also on decrease, although, on a positive side, share of non-accommodation expenditures is growing.
- There was a very little change in terms of visitors' socio-demographic characteristics and type and the range of the attractions visited.

### SURVEY METHODOLOGY

#### Research goals

- To obtain reliable and representative information on Zagreb's tourism demand.
- To ensure comparability with the previous TOMAS ZAGREB survey as well as to continuously monitor changes in Zagreb's tourism demand.

#### Area and time frame

- City of Zagreb
- May to October 2006.

#### Content of the survey

- Based on previous TOMAS ZAGREB surveys and the recommendations by European City Tourism.
- Socio-economic data, visitor's motivation, travel characteristics, characteristics of stay in Zagreb, attitudes towards different elements of tourism offer and expenditures while staying in Zagreb.

#### Survey instrument

- Questionnaire

<b>Method</b>	<ul style="list-style-type: none"><li>• Personal interviews</li><li>• Interview locations: 21 hotel and 19 locations within the city.</li></ul>
<b>Population</b>	<ul style="list-style-type: none"><li>• Tourists (visitors with at least one overnight) and one-day visitors.</li></ul>
<b>Sample size</b>	<ul style="list-style-type: none"><li>• 1446 respondents.</li></ul>
<b>Sample design</b>	<ul style="list-style-type: none"><li>• Hotel sample (n=495): stratified random sample regarding hotel category and country of tourist's origin. Sample allocation was proportional to hotel overnights regarding hotel category and country of tourist's origin.</li><li>• Sample for interviewing at locations (n=951): quota sample.</li></ul>
<b>Sample weighting</b>	<ul style="list-style-type: none"><li>• All survey results for hotel guests were corrected by 2006 data on tourist overnights (for the May - October period) by the country of origin.</li></ul>
<b>Data dissemination</b>	<ul style="list-style-type: none"><li>• Survey results are presented separately for five segment of tourism demand: tourists in hotels, hostels and private accommodation facilities, those visiting friends and relatives (VFR) and one-day visitors.</li><li>• Survey results for hotel guests are also presented by country of origin, hotel category and tourist's motivation. Survey results for VFR guests and one-day visitors are presented separately for domestic and foreign visitors.</li></ul>