

## EXECUTIVE SUMMARY

### TOMAS Zagreb 2008 SURVEY

- Survey on attitudes and expenditures of tourists and visitors in Zagreb in 2008. Conducted for the fifth time (1998, 2003, 2005, 2006 and 2008) for the Zagreb Tourism Board.

### SURVEY RESULTS: HOTEL AND HOSTEL GUESTS

#### Socio-demographic profile

- By the country of origin, domestic market is the biggest market segment in Zagreb hotels (23%). Their share is decreasing with the increase of hotel category (10% of domestic tourists in 5\* hotels). Among foreign tourists the biggest markets are USA (7%) and Germany (7%). The dominant market in Zagreb hostels are tourists from Great Britain (14%).
- Tourists are mostly young or middle-aged. The average tourist's age ranged from 28 for tourists in hostels to 43 for tourists in hotels.
- The majority of hotel guests (87%) have college or university education.
- Two thirds of hotel guests (66%) have monthly household income higher than 2000 euros, while one quarter of hotel guests are coming from households with the income of more than 3500 euros per month.

#### Motivation

- Primary motives for visiting Zagreb are business (41%), 'new experiences' (24%), 'short city break' (21%), visiting Zagreb's cultural sights (17%) and entertainment (14%).
- 'New experiences' prevail among hostel guests (55%), followed by entertainment (36%), visiting Zagreb's cultural sights (35%) and 'short city break' (34%).
- Majority of hotel (55%) as well as hostel guests (79%) are first-time visitors.

#### Sources of information

- The most important source of information is Internet. It was used by 64% of hostel and 41% of hotel guests. Internet is followed by travel guidebooks used by 44% of hostel and 28% of hotel guests.

#### Main travel characteristics

- Zagreb was the main travel destination for the majority of hotel guests (67%); for 53% Zagreb was one and only one destination while 14% visited some other destinations as well.
- The overwhelming majority of Zagreb hotel and hostel guests independently organize their visit to Zagreb. About 17% of hotel guests used travel agent services. The use of travel agent services increases with the increase of hotel category (25% of guests staying in 5\* hotels used the travel agent services).
- Most often Zagreb hotel guests come alone (36%) followed by those coming with a partner (30%). Hostel guests, on the contrary, mostly come with friends or acquaintances (45%).
- Hotel guests most commonly arrive by air (51%) or car (31%), while hostel guests arrive by train (33%) or plain (27%).

### Main characteristics of stay in Zagreb

- Both, hotel and hostel guests stay, on average, 3 nights. The majority of hotel guests (61%) stay in Zagreb for one or two nights.
- 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. Almost every sixth hotel guest and every fourth hostel guest have shown no interest for visiting the museums.
- Zagreb hotel guests are most frequently visiting sport events and various events at Zagreb Fair. Guests staying in hostels are visiting concerts and cinemas.
- Visitors are frequently patronizing Zagreb's cafés, while 67% of hostel and 71% of hotel guests also visit Zagreb's restaurants.
- Zagreb Card is used by 3% of hotel and 7% of hostel guests. About 7% of hotel guests and 3% of hostel guests used the organized sightseeing tour. Tourist information centers are visited by every fourth and almost every second guest in hotel and hostel, respectively.
- Regarding the mode of transport used while staying in Zagreb, hostel guests rely mostly on public transport (76%). Hotel guests, besides public transport (39%), also used taxi (34%) and own car (24%).

### Attitudes

- The majority of Zagreb's hotel guests consider Zagreb suitable for a short break. Guests are also satisfied with picturesqueness of the town, tidiness, entertainment, a range of cultural sights as well as with a gastronomic offer.
- Zagreb's guests 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, as well as with quality of tourist and traffic signage.
- Hotel guests are mostly satisfied with the quality of hotel accommodation as well as with services in hotels and friendliness of hotel staff. All elements of hotel accommodation are rated significantly higher in 4\* and 5\* hotels. Guests staying in hostels are mostly unsatisfied with their accommodation.

### Expenditures

- Average daily expenditure of hotel guests in Zagreb is estimated on 144 Euros per person, of which 61% or 88 Euros is spent on accommodation, followed by 21 Euros or 15% for food and drink in bars, cafés and restaurants and 17 Euros or 12% spent for shopping.
- Hostel guests spent on average 51 Euros per person.

## **SURVEY RESULTS: ONE-DAY VISITORS**

### Socio-demographic profile

- Domestic visitors prevail among one-day visitors in Zagreb (59%). Among foreign visitors most frequent are those from neighboring or closer markets - Germany, Bosnia and Herzegovina, Slovenia, Austria and Italy.

- One-day visitors are mostly younger population - 57% is younger than 35 years of age. The average age of one-day visitors is 36 years.
  - High school education has been achieved by 39% of visitors, followed by 35% with university degree and 24% with college education. Foreign visitors have average education level higher than domestic ones.
  - Almost three quarters of one-day visitors have monthly household income of 2,000 Euros or less.
- Motivation
- Primary motives for visiting Zagreb are 'short city break' (30%), visiting friends and relatives (25%), shopping (23%), entertainment (21%) and 'new experiences' (18%).
  - Among one-day visitors there are 45% of first-time visitors, while 32% has already visited Zagreb for six or more times.
- Sources of information
- The most important source of information was Internet used by 31% of visitors, followed by previous visits (19%). The use of Internet (48%) and travel guidebooks (30%) is more frequent among foreign visitors.
- Main travel characteristics
- Zagreb was the main travel destination for the majority of one-day visitors (67%); for 57% Zagreb was one and only one destination while 6% visited some other destinations as well.
  - The overwhelming majority of Zagreb one-day visitors independently organize their visit to Zagreb (90%).
  - One-day visitors most commonly arrive to Zagreb by car (49%), bus (24%) or train (16%).
  - Almost equally frequent are visits accompanied by friends (29%), partner/spouse (25%) or without company (26%). Only 19% of visitors came with family.
- Main characteristics of stay in Zagreb
- One-day visitors spend in Zagreb six to nine hours (51%). The average stay is nine hours.
  - The city center attractions - the main Ban Jelačić square, down town, upper medieval town and the Cathedral are the most popular to one-day visitors too. Outside the city center the most popular are the recreational center Jarun, recreational park Maksimir and the Botanical garden close to the city center.
  - One-day visitors usually do not plan to visit Zagreb museums. The main reason for such behavior is 'no free time' for every second visitor, but there is also high proportion of those not interested in museums (every fourth visitor). The Klovićevi Dvori Gallery is visited by 7%, while other museums and galleries by less than 5% of visitors.
  - One-day visitors visit events at Zagreb Fair as well as sport and cultural events and cinemas.
  - Zagreb's cafes are visited by 73% of one-day visitors, 41% go to restaurants, 29% to fast food restaurants, 27% visit shopping centers, 24% pastry shops and 16% boutiques or city-centre stores.
  - One-day visitors do not use Zagreb Card at all, while 7% of them visit tourist information centers and only 2% attend organized city sightseeing.

- The main modes of transport while staying in Zagreb are public transport and own car used by 38% and 35% of visitors, respectively.
- Attitudes**
- One-day visitors are unsatisfied with the parking facilities, while somewhat higher level of satisfaction has been expressed for quality of public/local transport, quality of attraction signs, quality of information/ availability of brochures in local tourist offices and for placement and clarity of road signage in Zagreb.
  - One-day visitors are satisfied with shopping possibilities, suitability for a short break and gastronomic offer.
  - One-day visitors feel safe in Zagreb. They are also highly satisfied with the hospitality of local residents and friendliness of tourist information centre staff. Somewhat lower satisfaction is expressed for friendliness of public officials.
- Expenditures**
- One-day visitors spent on average 61 Euros per person, with 59% or 36 Euros spent on shopping and 29% or 18 Euros on food and drink in bars, cafés and restaurants.

## **TOMAS ZAGREB 2008 - SURVEY METHODOLOGY**

- Research goals**
- To obtain reliable and relevant information on Zagreb's tourism demand.
  - To ensure comparability with the previous TOMAS Zagreb surveys as well as to continuously monitor changes in Zagreb's tourism demand.
- Area and time frame**
- City of Zagreb
  - May to December 2008
- 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
- Method**
- Personal interviews
  - Interview locations: 17 hotels, 2 hostels and 18 locations within the city.
- Population**
- Tourists (visitors with at least one overnight in Zagreb's hotels or hostels) and one-day visitors.
- Sample size**
- 1574 respondents.
- Sample design**
- Hotel sample (n=680): stratified random sample regarding hotel category and country of tourist's origin. Sample allocation was pro-

portional to hotel overnights regarding hotel category and country of tourist's origin.

- Sample at locations (n=894): quota sample.

#### Sample weighting

- All survey results for hotel guests were corrected by 2008 data on tourist overnights (for the May - December) by the country of origin and hotel category.

#### Data dissemination

- Survey results are presented separately for three segments of tourism demand: tourists in hotels and hostels, and one-day visitors.
- Survey results for hotel guests are also presented by country of origin, hotel category, tourist's motivation and season. Survey results for one-day visitors are presented separately for domestic and foreign visitors.