Zagreb Visitor Survey 2017/18

Infographic Report

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Background

Zagreb Tourist Board commissioned STR – Tourism Consumer Insights to undertake the Zagreb Visitor Survey 2017/18.

The survey established the profile of visitors, background to visits, type of accommodation used, duration of visit, visitor activities, expenditure levels and rating of visit.

The overall aim of the research was to obtain reliable and representative data on the Zagreb tourist market and to monitor changes in tourist profile and needs.

Methodology

The visitor survey was conducted between May 2017 and April 2018 with a representative sample of 2,007 visitors taking part (of which 1,123 were hotel guests). Visitors were defined as staying overnight or on a day visit to Zagreb.

The interviews were conducted face-to-face by local, professionally trained interviewers, using CAPI technology (Computer Assisted Personal Interviewing) with respondents selected at random, on a 'next to pass' basis. This ensured a fair representation of visitor markets.

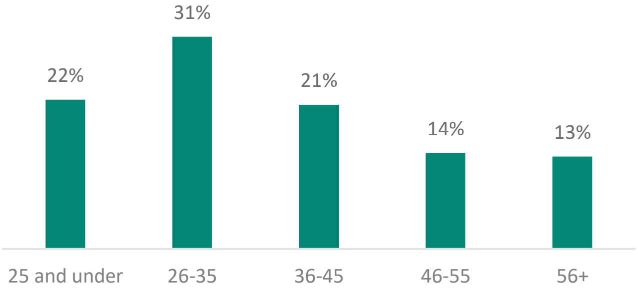
Interview locations included hotels (3-5 star), hostels, pedestrianised areas and other popular visitor spots such as Ban Jelačić Square, the National Theatre, Zagreb Cathedral, Maksimir Park/Zoo, as well as the Zagreb bus and railway stations.

Profile of Visitors

The overall profile points to a largely adult, well-educated visitor with good income levels.

Key country markets include Germany, the UK, the US and France.

Gender



Age

35 Just over half of visitors were aged 35 or under.

5 key countries accounted for 40% of all visitors.

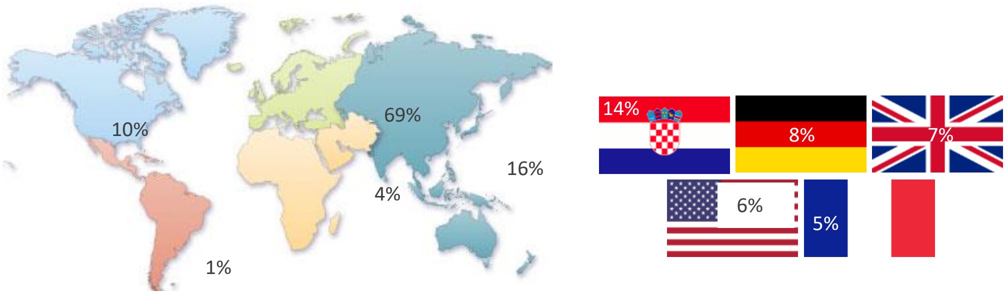
The majority of visitors were university educated.

Average income per month for visitors was €2,385.

Variety of visitor groups:

- Partner/spouse (32%)
- Alone (31%)
- Friends (26%)

Just 6% of visitors were travelling with children under 16.



Origin

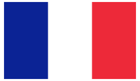
Background to Visit

The results highlight a core of loyal visitors to Croatia and Zagreb who increasingly travel to Zagreb by plane.

Zagreb is often considered next to Split and Dubrovnik.

Online booking and online sources of information feature heavily in visitors planning and booking processes.

- Excluding Croats, 44% of visitors had been to Croatia before and 31% had been to Zagreb.
- Almost 4 in 10 visitors had considered another destination. Split and Dubrovnik were commonly considered. Zagreb chosen for the choice of things to see and do, and because it is an arrival point for broader Croatian trips.
- Plane (44%) was the most common method of arrival, though there were some noticeable variations e.g. high proportion of Germans arriving by car.
- The majority of visitors booked accommodation via online travel agents (39%) or providers websites (37%).
- TripAdvisor was the most common source of information for visitors both before and during their visit to Zagreb.

	Visited Croatia	Visited Zagreb
Total (ex. Croats)	44%	31%
	67%	46%
	33%	19%
	23%	17%
	39%	22%

Type of Accommodation

Hotels were clearly the most common form of accommodation with nearly two-thirds of all visitors choosing to stay in a hotel.

There are some clear variations in accommodation type when viewed by country market and visitor age.

88% of visitors had an overnight visit in Zagreb with the vast majority of non-Croat visitors staying overnight (95%).

Hotels accounted for nearly two-thirds of all stays, ranging from 48% of Croat to 77% of US visitors.

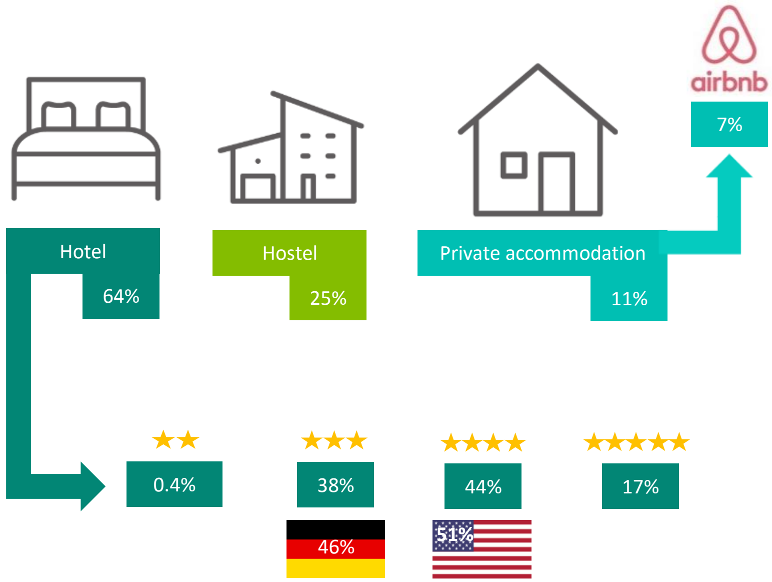
Hotel guests were most likely to stay in ★★★ or ★★★★ hotels (82%).

- US visitors group most likely to choose ★★★★ hotels.
- German visitors most likely to stay in ★★★ hotels.

Visitors aged 25 or under were very likely to stay in hostels (67%).

Private accommodation was most commonly used by Croat visitors.

Overall, 7% of visitors used an Airbnb when visiting Zagreb.



Visit Activities

Visit activities tended to focus on certain areas of the city, such as Ban Jelačić Sq, Upper and Lower Town, and in types of establishment e.g. café/coffee shops.

In general there were much lower levels of engagement with museums and events, with the exception of Advent in Zagreb which was very positively regarded.

In general, non-Croat visitors were more engaged in activities.


Ban Jelačić Sq. (88%) was the most visited location in Zagreb.


71% of visitors spent time in cafes/coffee shops.

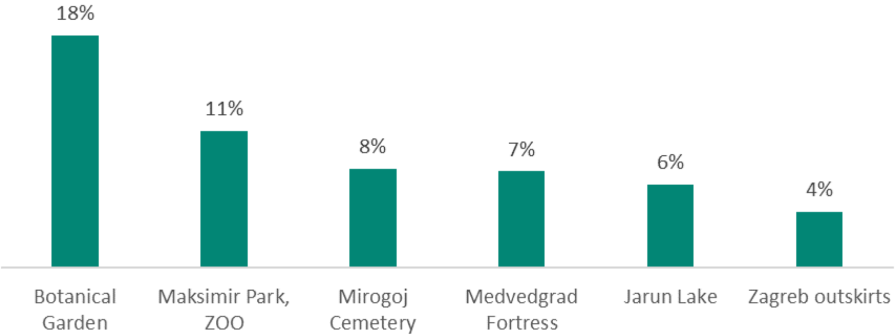
21% visited The Museum of Broken Relationships.


16% visited the Tourist Information Centre.

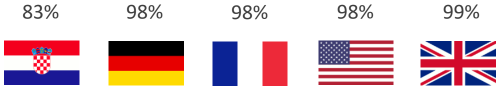

Over nine-tenths (93%) of visitors in December had attended Advent in Zagreb, with average no. of visits 2.2.


Nearly three-quarters of visitors (73%) felt Advent would encourage them to re-visit Zagreb

Ban Jelačić Sq.	Lower Town	Upper Town	Cathedral	Dolac Market
				
88%	83%	80%	71%	63%



Engaged with locations



Rating of Visit

Visitors provided high ratings for many aspects of their visit to Zagreb, in particular on their *accommodation*, *social elements* and *value for money*.

Some visitors, and in particular those aged 25 and under, were less satisfied with aspects of the *tourism offer* and the *city infrastructure* which highlights areas for potential development.

Accommodation

- In general, visitors were most satisfied with their **accommodation**.
  Friendliness of accommodation staff rated highest of 24 aspects

Social Elements | Value for Money

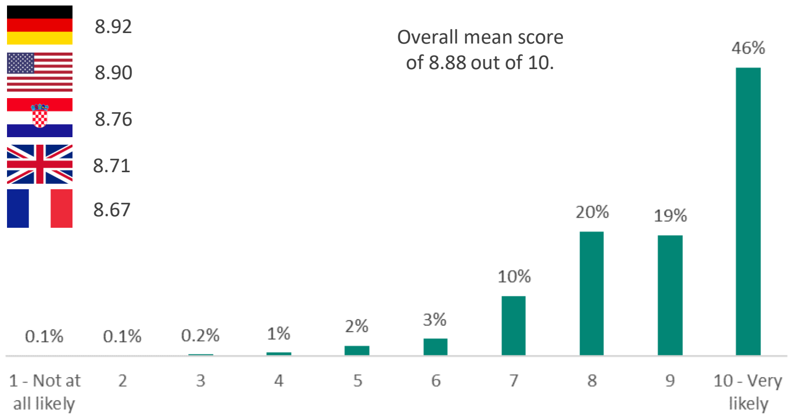
- Also, **social elements** and **value for money** were rated highly.
  Personal safety and *value for money of accommodation* rated highly

Tourism Offer | City Infrastructure

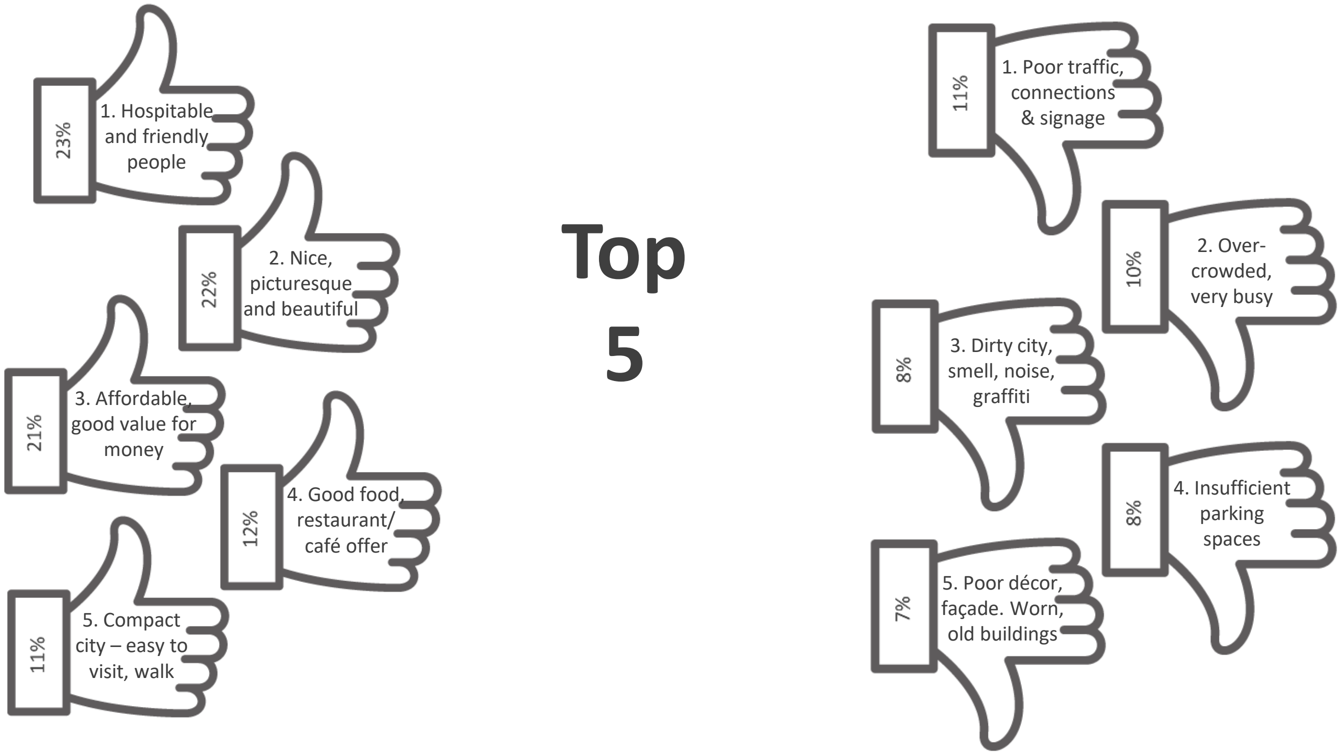
- Although the *beauty of the city* was highly rated, the **tourism offer** in general, and *city infrastructure* received lower ratings.
  Street performances, shopping offer (**tourism offer**)
  Parking availability, Free WiFi in public areas (**city infrastructure**)

- Visitors aged 25 or under had noticeably lower ratings for **city infrastructure** and the **tourism offer** compared to older visitors.

Likelihood of recommending Zagreb to others



Rating of Visit – Advantages & Disadvantages of Zagreb



Q: In your opinion, what are the main advantages of Zagreb as a tourist destination compared to other central European cities like Prague, Ljubljana, Vienna, Budapest

Visitor Segments

Cultural Enthusiasts (29%)	Seeking it All (17%)	Family & Events (16%)	Multi-Traveller (19%)
Importance Rating: 1	**Importance Rating: 2**	**Importance Rating: 3**	**Importance Rating: 4**
Seeking an authentic cultural experience from exploring and learning about local culture and sites, and mingling with locals whilst relaxing and unwinding.	Eager to see as much as possible with many aspects of their visit regarded as very important, especially relaxing, enjoying local cuisine, learning about a different culture.	Coming to Zagreb in order to visit friends and family and to attend specific events, perhaps combining the two.	Eager to experience different cultures, visit museums, attractions and cultural events. Want to relax and unwind.
This segment is identifiable (e.g. key countries) and has a clear preference for guidebooks and TripAdvisor as sources of information.	This segment seek to engage with Zagreb on many levels and they stay longer than other segments. They also engage with various marketing channels.	This segment knows Zagreb and has friends and family in the city.	Multi-traveller are hard to pin down, they come from many different countries and are visiting Zagreb as part of a wider holiday.
In addition, Zagreb has a range of cultural offerings to appeal them.		They are regular visitors but their stays are less 'touristy' and they spend less than average. The nature of their visits means they are less likely to recommend the city to others.	Although they engage with the city they are not as enthusiastic as other segments, however they do spend more than average when visiting Zagreb.

Thank You!

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