



HRVATSKA GOSPODARSKA KOMORA

CROATIAN CHAMBER OF ECONOMY



Experiences and Challenges of Urban Tourism in Croatia – Sustaining Identities

EUROMEETING 2012.

Area 56,594 km²

Population 4,5 mln

CCE TOURISM DEPARTMENT



- *Background*
- *Experiences*
- *Users*
- *Best Practices and Model development issues*
- *Challenges*

CROATIAN TOURISM

	2008	2009	2010	2011
Foreign Arrivals (in mn)	8.60	8.60	9.10	9.92
Foreign overnights (in mn)	48	49	51	54.75
Revenue €	7.45	6.36	6.2	6.6
Revenue per capita €	1679.2	1435.5	1410.19	1493.63
GDP tourism share €	15.7	14%	14%	14.40%
Of total exports €	37.60%	39.50%	35.20%	35.10%

Pola 1c.
Vespasian

CROATIAN TOURISM 2011

International Tourist Arrivals



CROATIA

20th by population

14th by tourist arrivals

16th by tourism receipts

Source: UNWTO Highlights 2011

A photograph of a stone walkway with a series of arches leading to a courtyard. The walkway is made of large, rough-hewn stone blocks. The arches are supported by thick stone pillars. The courtyard beyond the arches is paved with smaller stones and has some green plants. The lighting is bright, creating strong shadows on the stone.

CROATIAN TOURISM 2011

TOP MARKETS

- Germany 20%
- Slovenia 11 %
- Italy & Austria 8%
- Czech 7%
- Hungary 5%
- Netherlands 4%

Origin: Ancient Roman

Spalato , Brioni – leisure and activity

Pola – events, religious

Aquae Iasae, Balisse, Vivae... –
thermal inspiration

Narona – imperial tourism



Sustainability - CULTURE / HERITAGE:

Meaningful city experience



Who is it for? EU Cultural participation

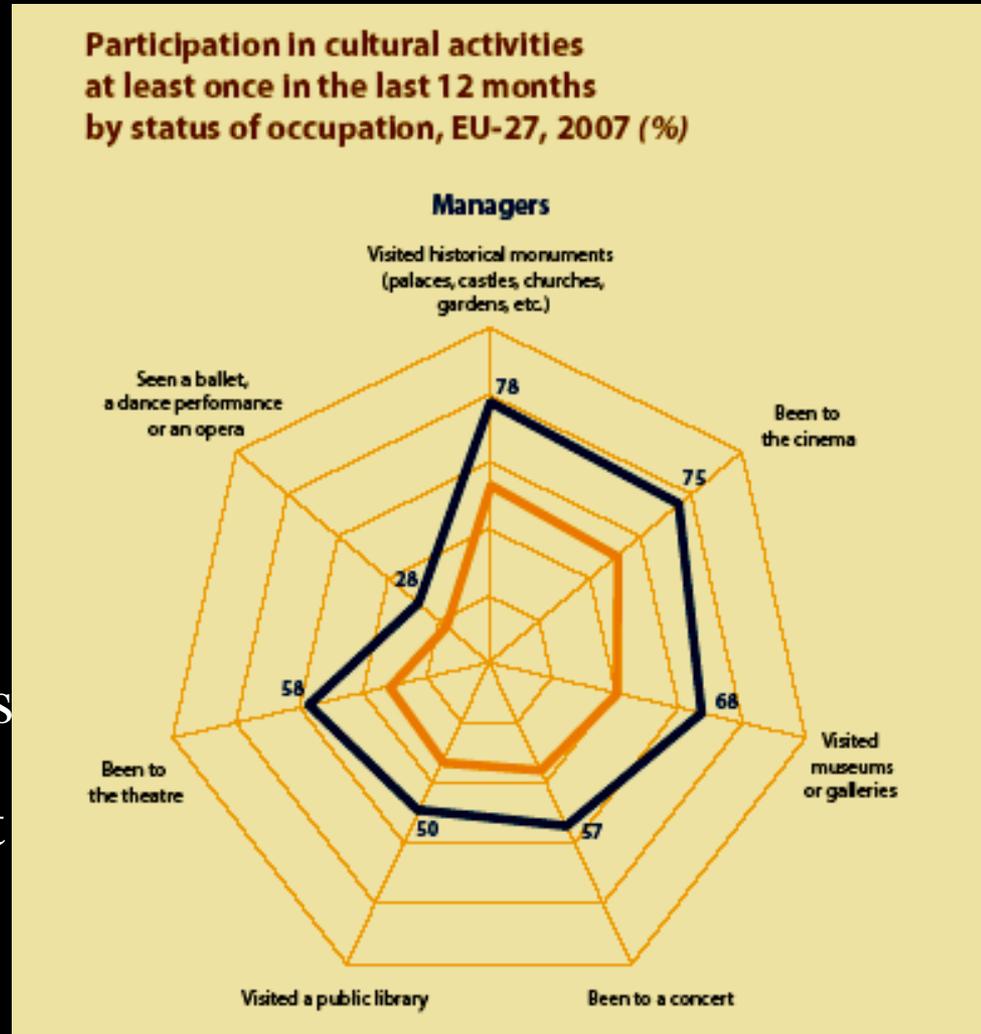
Activity in this category practised by more than 50% of the population (EU-27) that
VISITS HISTORICAL MONUMENTS.



Who is it for? EU Cultural participation

The findings in relation to social status or level of education confirm that use of cultural facilities tends to increase in line with financial and, particularly, socio-cultural resources.

People at **managerial level** have the **highest rates for visiting** museums or historical monuments and for attending theatre and ballet, while students are the most numerous for cinema-going, library use and attendance at concerts.



	% of respondents who in the last 12 months have at least once:								
	Watched culture on TV/radio	Read a book	Visited a historical monument	Been to the cinema	Visited museums or galleries	Been to a concert	Visited a public library	Been to the theatre	Been to the ballet or opera
EU27	78	71	54	51	41	37	35	32	18
Belgium	79	65	54	54	42	40	37	33	17
Bulgaria	72	58	30	22	20	28	19	21	9
Czech Rep.	87	82	68	53	44	45	32	44	20
Denmark	89	83	76	69	65	58	68	40	27
Germany	78	81	65	53	48	42	28	37	19
Estonia	93	79	63	34	48	62	51	49	23
Ireland	64	75	51	66	38	49	47	33	13
Greece	71	59	33	46	25	21	15	30	12
Spain	79	59	50	56	38	34	29	25	12
France	64	71	54	63	43	35	33	23	19
Italy	74	63	49	54	34	31	29	26	20
Cyprus	67	56	35	38	25	29	13	25	10
Latvia	90	75	62	36	47	59	39	41	21
Lithuania	90	64	51	33	33	52	32	27	20
Luxembourg	76	72	64	62	54	53	21	40	27
Hungary	87	78	45	36	39	31	33	31	16
Malta	81	45	47	49	34	32	24	25	28
Netherlands	84	84	71	62	62	56	51	58	26
Austria	58	79	50	56	39	43	24	42	18
Poland	81	64	48	41	32	29	37	18	12
Portugal	67	50	35	39	24	23	24	19	9
Romania	75	58	40	22	27	28	22	20	8
Slovenia	86	72	60	47	39	49	53	36	16
Slovakia	92	80	64	50	40	37	42	37	16
Finland	89	79	63	52	51	51	72	48	23
Sweden	88	87	75	71	62	53	70	47	26
UK	77	82	61	53	49	40	53	41	20

Source: European Commission - Special Eurobarometer 278.

Household cultural expenditure

Cultural spending comes under the heading of leisure and culture expenditure.

In this sense the activities related to attending cultural events (cinema, theatre, concerts, museums, galleries and others) participate with **13% in household expenditure.**



HERITAGE IN TOURISM – 4 meanings*

**Formal and
unformal
education**

**Local
identity**

**Tourism
attraction**

**Economic
regeneration**

**Global
perspectives**

**Local
perspectives**

Consumer

*Miller, Sue. “Heritage Management for Heritage Tourism”

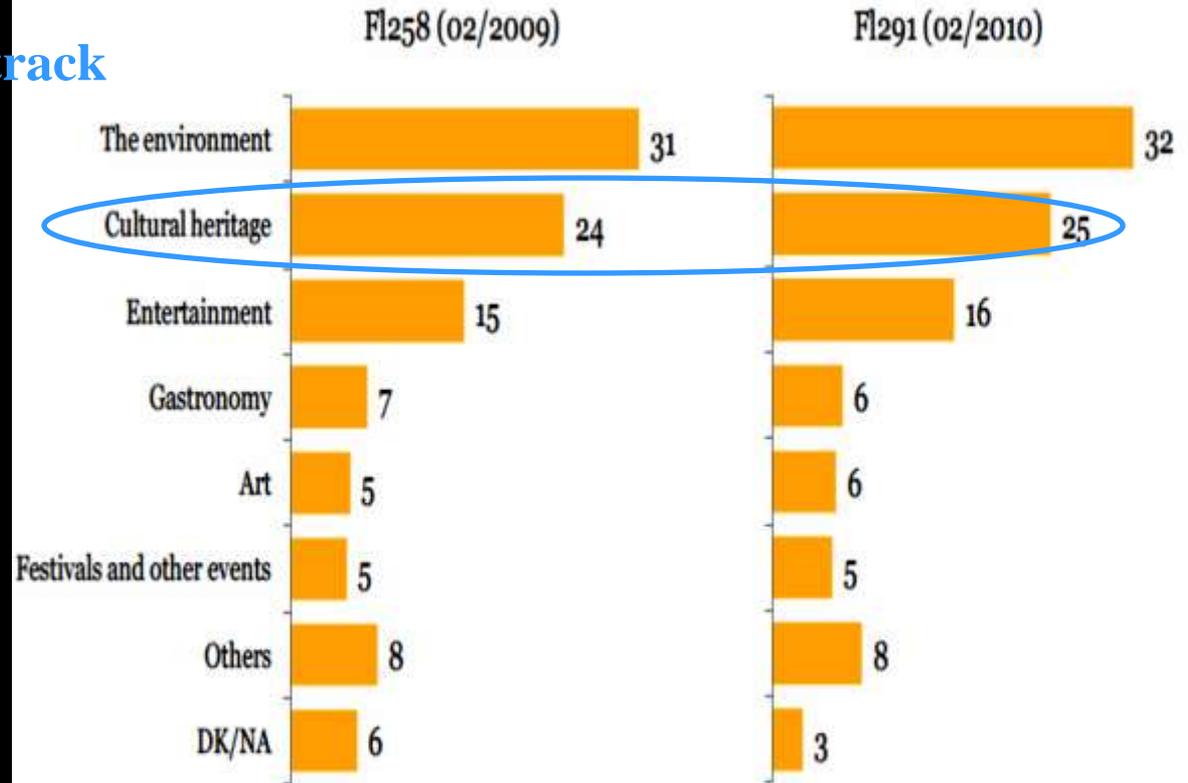


Flash Eurobarometer

European Commission

Attractions influencing the choice of destination

Major motivation for EU
50% EU - individuals
30% out of the beaten track



Q12(2010)/Q20(2009). From the following attractions, please choose the one that has the major influence on your choice of destination?

%, Base: all respondents, EU27

TRENDS

Destination CONSUMERSPHERE sensual shopping

Fragmented
stays

Symbolic
spaces

coherent
Cultural
concentrations

eatertainment

Emotional search

Value for
money

Authenticity

Individualism

Leaving the zone of
hipermaterialism

Green consumerism

New healthy
destinations

designoholics

-Myth of the location -

URBAN HERITAGE TANGIBLE & INTANGIBLE



Dynamic, still healthy city offers is rivalled by its density and depth , its capacity for making available layer upon layer of human history, not merely through its own records and monuments , but through distant areas that its great resources make it possible to draw upon... ,

SUSTAINABLE URBAN TOURISM

Cities - SYMBOLIC DESTINATIONS

Offering symbolic values, the spirit of rich spaces

City:

- the best organ of memory man has yet created**
- the best agent for discrimination and comparative evaluation...**

The rythm of life in cities - an alternation between materialization and etheralization:

- Living culture, ways**
- Memories, Values**
- Myth....**



CROATIAN CITIES 2011.

	2011.
Rovinj	2 917 562
Poreč	2 564 865
Dubrovnik	2 155 165
Zagreb	1 183 125
Šibenik	1 027 488
Zadar	1 044 350
Nin	847 959
Split	639 889
Vinkovci	38 887



CULTURAL CONCENTRATIONS: MUSEUMS

Zagreb 22%
 Continent 26%
 Coastal area 52%

Source:NBS

Concentrations

Source:NBS

COUNTIES:

Museums

Visits

Tourists

Bednights

Dubrovačko-neretvanska

19

974 471

1 046 826

4,7 mil

Zagreb & Zagreb county

44

847 541

765 312

1,2 mil

Istrian

9

122 048

2 895 636

19,0 mil

Zadar

12

109 507

1 022 464

6,4 mil

Splitsko-dalmatinska

18

186 168

1 777 700

10,2 mil

Primorsko-goranska

18

204 314

2 360 214

11,7 mil

Šibensko-kninska

3

29 234

650 059

3,9 mil

Ličko senjska

3

6 738

425 675

1,6 mil

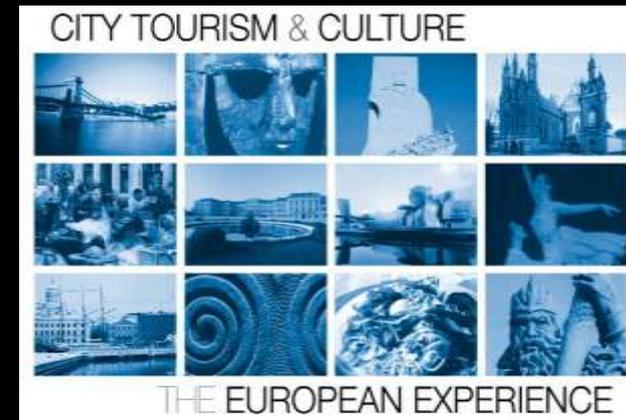
Peak of the season

URBAN TOURISM?



Market sources:

Smaller, richer countries in north-western Europe Market growth expected primarily from Asia



2005 results
131 cities

Activities

Sightseeing, Visiting museums, Soaking atmosphere

Trends:

Not only older people but the 20-30 year old tourists are an important group

Culture is the most important motivation for city trips

More trips to smaller and new EU regions

Traditional cultural tourism cities: loose market share to the relatively new destinations in Central and Eastern Europe



Risks

Increasing visitors numbers -
negative effects on historic inner
cities and World Heritage Sites

**Decreasing hospitality,
overcrowding, loss of
authenticity and possible
damage to the historic
environment.**

Cultural tourism in Europe is
traditional (primarily museums
and cultural heritage) rather
than innovative.

The traditional cultural tourism
cities will lose market share in
favour of new destinations with
**innovative products, such as
signature architecture, new
lifestyles and the creative
industries**

Opportunities

Product development:

- **Cultural diversity and ethnicity**,
culinary culture, festivals and
events, fashion, design and
signature architecture
- **Cultural themes** or cultural theme
years - a way of getting parties to
work together:
- For some visitors culture is the
prime motivator, for others the
(historic) decor in which the visit
takes place is of importance.
- **Linking creative industries** with
traditional cultural products
becomes important

CONSUMERSPHERE

today

Travelism Tomorrow

- Product
- Markets
- Consumer
- Supply Chain
- Distribution
- Brand
- Investment

**Sustainable
Mobility
+
Sustainable
Destinations
+
Sustainable
Lifestyles**

Source: greenearth.travel

ITB WORLD TRAVEL TRENDS REPORT 2011/2012

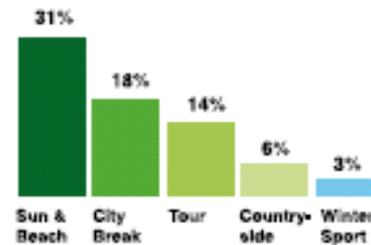
prepared by IPK International on behalf of ITB Berlin
- THE WORLD'S LEADING TRAVEL TRADE SHOW®

Main Type of Vacation

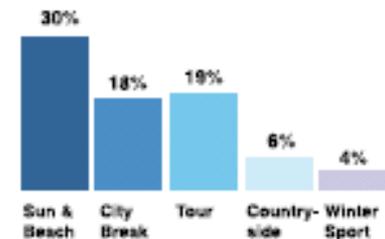
- Poor vs. Rich -



LOW INCOME



UPPER INCOME



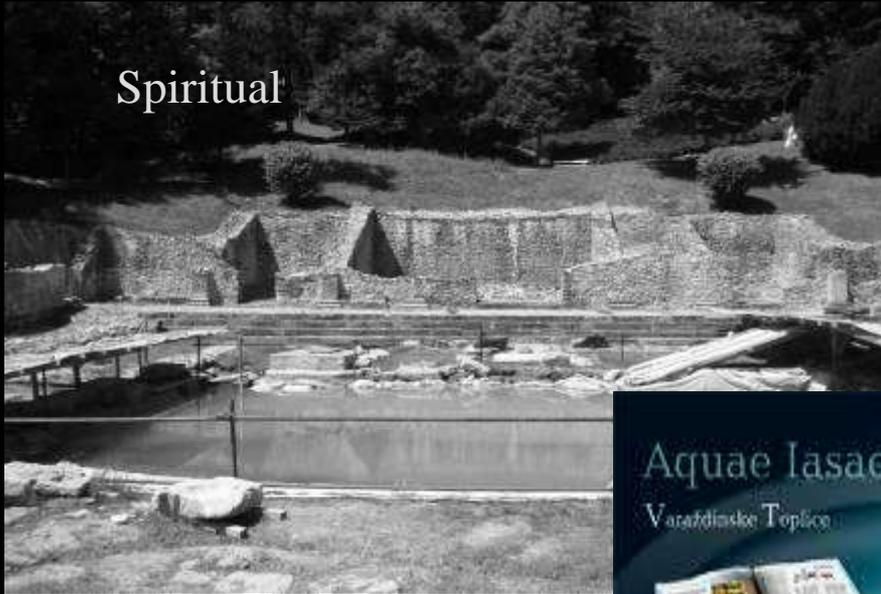
Source: European Travel Monitor® 2010 — IPK International

IPK INTERNATIONAL Tourism Research • Tourism Marketing • World Travel Monitor®

Is there Demand for Sustainable Tourism?

Holistic approach : Know thyself

Spiritual



Events



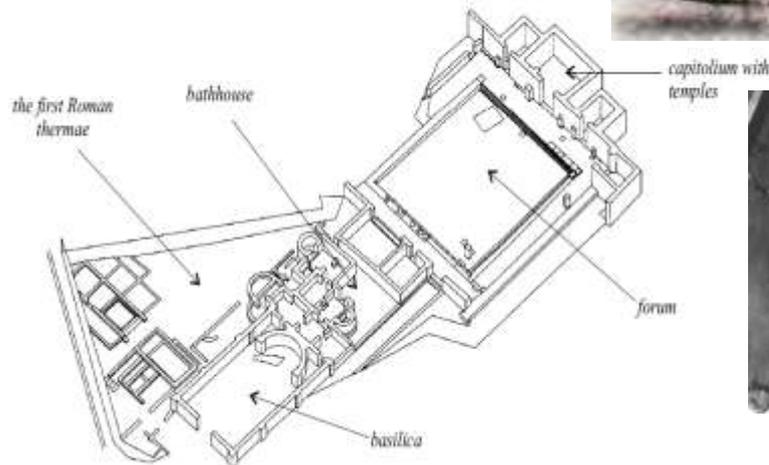
Art

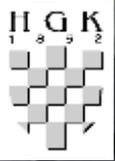
Health

Sports -activities



Cover Page: The Two Millennia of Varazdinске Toplice (Varazdin's Spa)

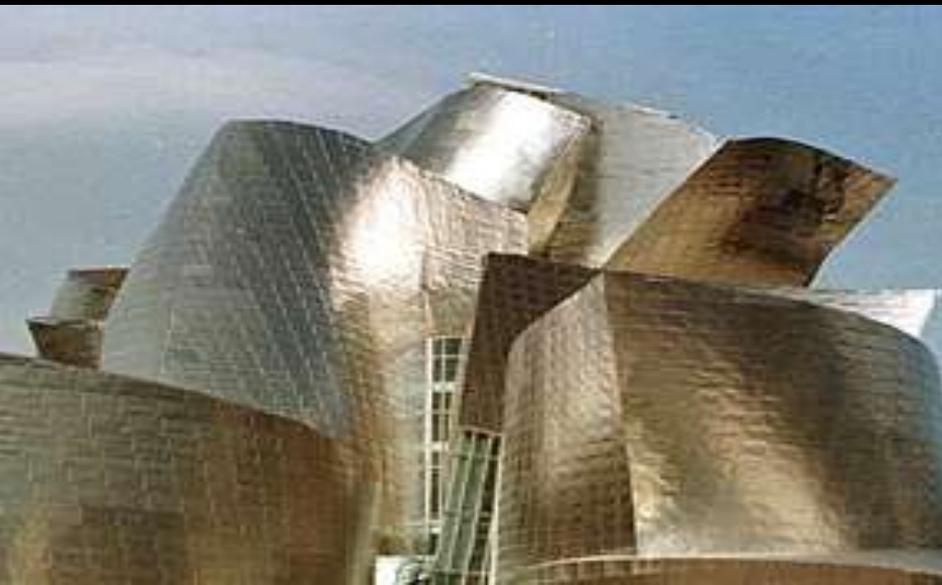
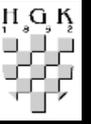




“Destination building”



High investments?



Challenges – model development



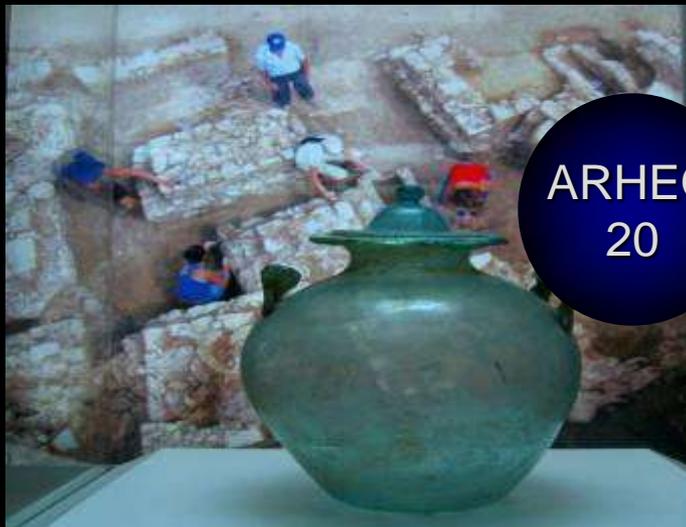
- Lesser developed and destroyed areas
- Touristically virgin areas
- Demography

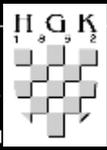
**BUT:
HUMAN
MEASURE**



CULTURAL TOURISM AFFILIATION

promoting integrated approach to sustainability





CULTURAL CAPITALS
HISTORIC THERMAL
WALLED CITIES

networking

HISTORIC

INDUSTRIAL
BAROQUE
RENEISSANCE
ROMANESQUE
ROMAN
ARCHAEOLOGY

ICONIC

MEGA
CITIES

THEMATIC
DESTINATIONS

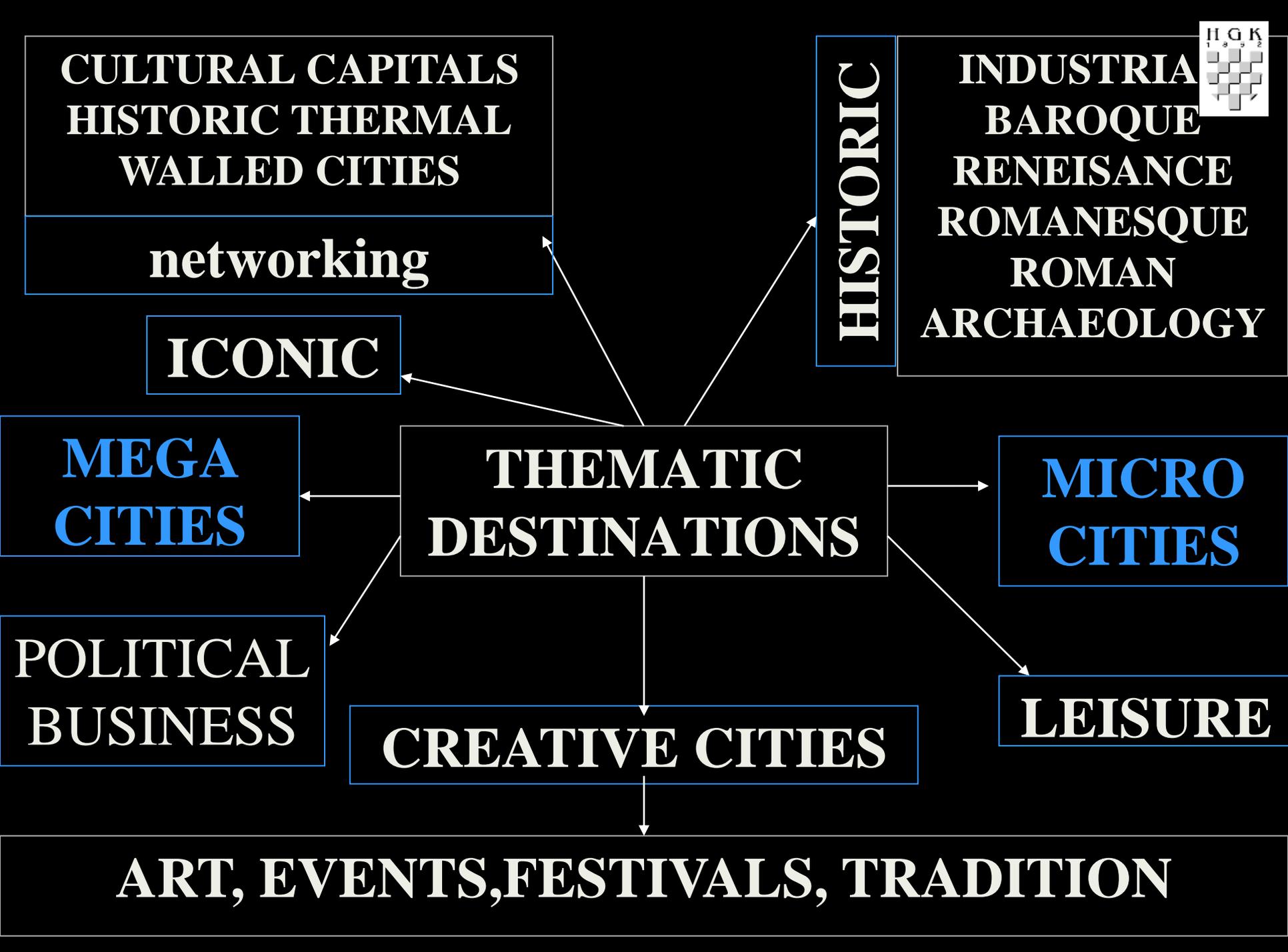
MICRO
CITIES

POLITICAL
BUSINESS

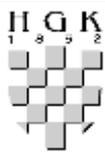
CREATIVE CITIES

LEISURE

ART, EVENTS, FESTIVALS, TRADITION



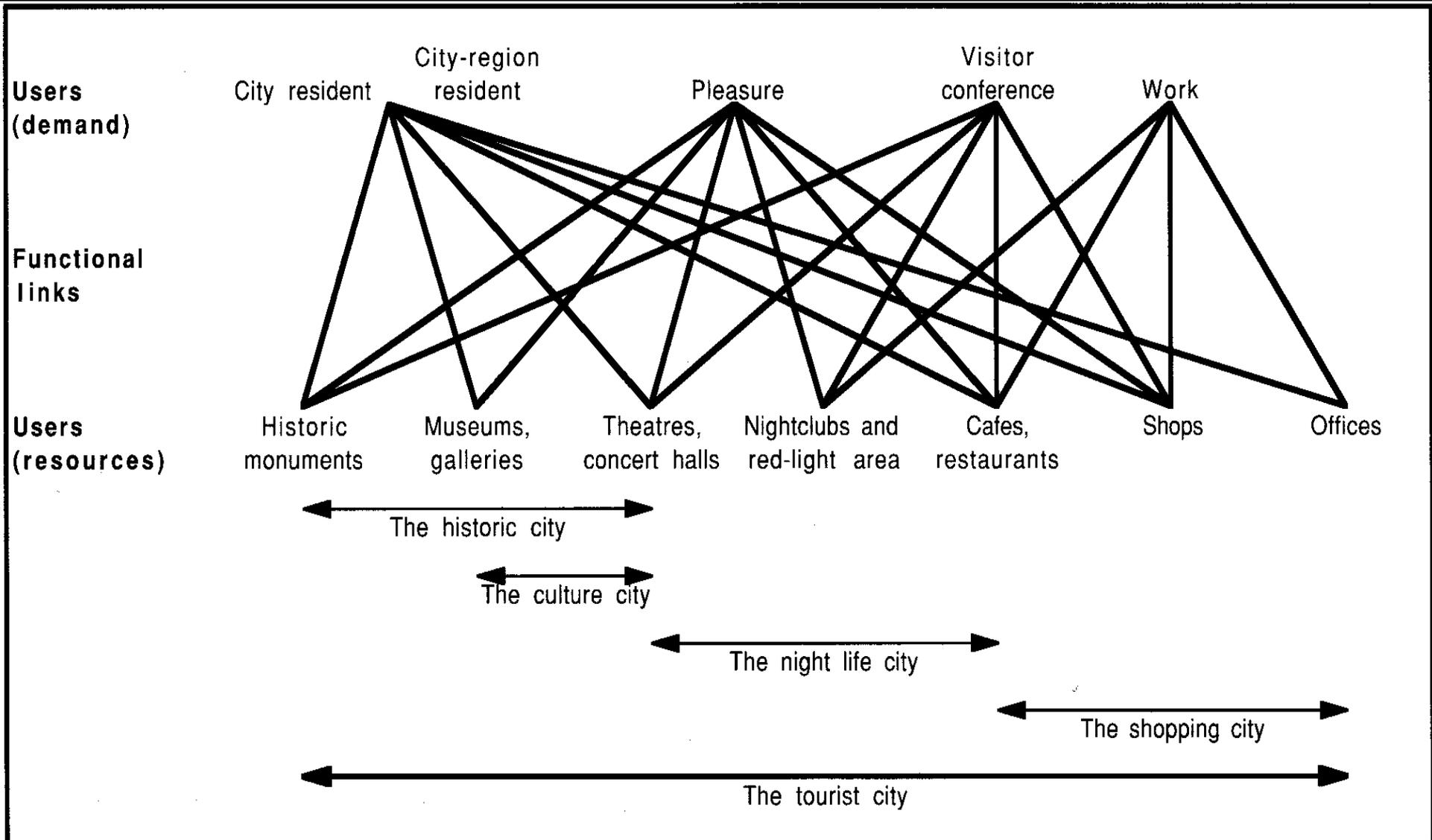
Micro city destinations - In Stone Carved Life stories

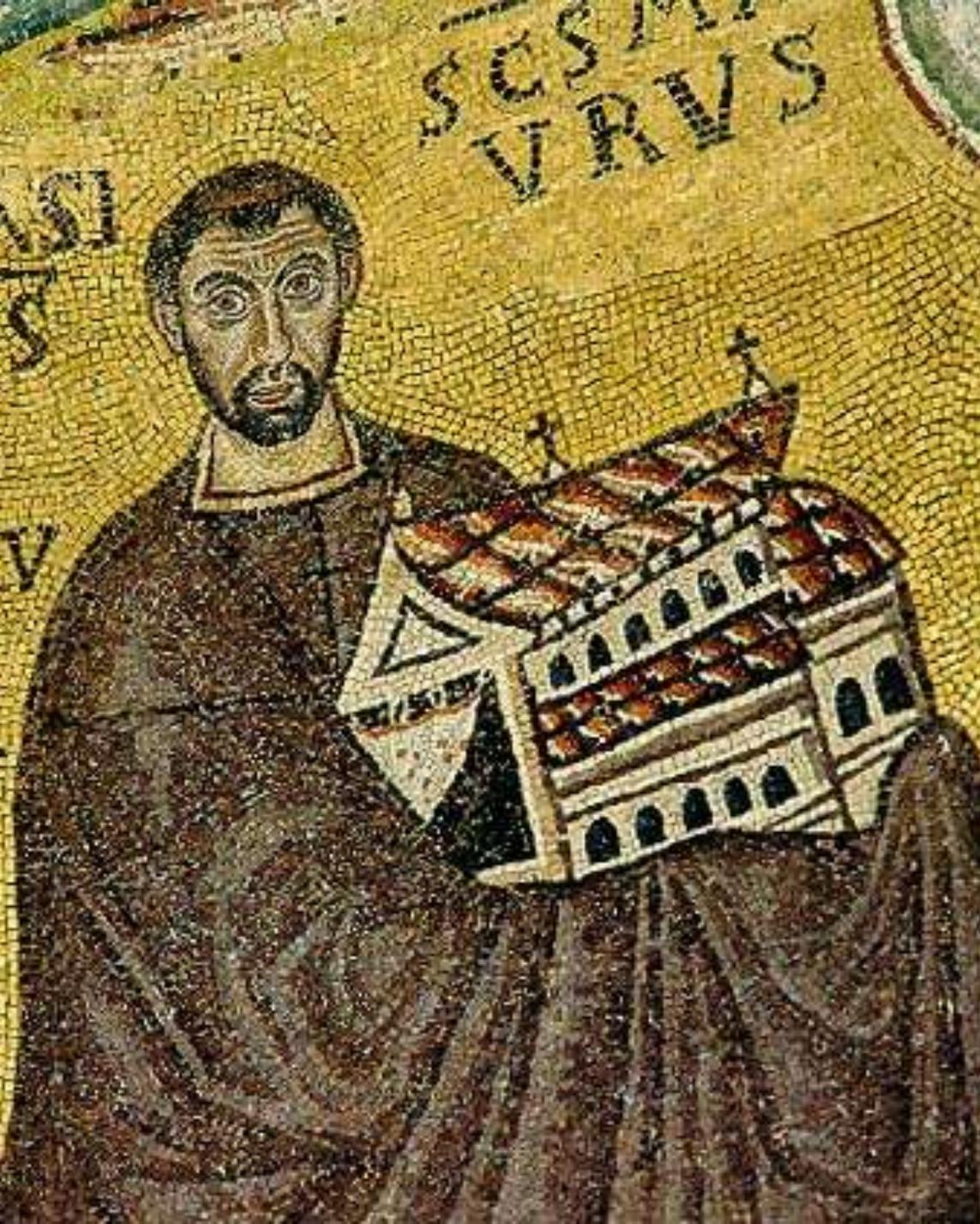


1700 years of the Emperors Palace in Split

Historic city **RETAINS** , by reason of its amplitude and its long past , a larger and more various **collection of cultural** specimens than can be found elsewhere....(I.Mumford)

Sustaining functions?





What do we have?

Model Development - Integrated approach



Culture, art, history

Eno-gastronomy
Culinary delight
Šokolijada

Accommodation

Structural content
Museums galleries,
events

Signalisation
and information

Sustainability

Travel agents



Accessibility
And Parking



Kitesurfing

playgrounds
thematic gardens
walkways

Sustaining meanings: NIN



(PRESERVING) AESTHETICS ZONE:



Events

Facilities and hospitality

organizations

people

Evaluation

Mapping

Interpretation

Presentation

Protection

memories

attitudes

values

Sustaining meanings – Creating Emotional attachment



PD: NIN FUTURE ???

INVENTING NEW COMFORT ZONE
NEW VISITORS ???- SUPERSEGEMNATION



OPAL

Femigration

Homo aestheticus

Fun seekers

Families

Homo medicus

LOHAS

Serenity seekers

Homo spiritus

CHANGING CONTEXT OF URBAN ENVIRONMENT

CONSUMERS	Demand	Niche	Activity	Creativity
OPAL (baby boomers/ Grey panthers Silver/golden generation)	Contemplation Medical Health Spiritual needs...	Rest & recreation, wellness ... Art, Culture religion	Walking, shopping,... Medical treatments	Learning songs – singing...
FAMILIES	Edu/emo- tainment ...	History Creative...	Balooning, bicycling...	Painting, Photo safary..
BUSINESS	Inspiration ... Creativity	Enc- gastronomy...	Tasting Riding...	Culinary workshops, olivepicking
GEN X (often DINK)	Challenges Energyzing...	Eco-cultural & cleaning volontery..	swamps, rebuilding...	Pottery workshops...
GEN Y LOHAS Millenials	Stimulation Wisdom	Mindness Comtemplation ...	Participation express oneself	Language learning..





Antique glass Museum Creativity through ages



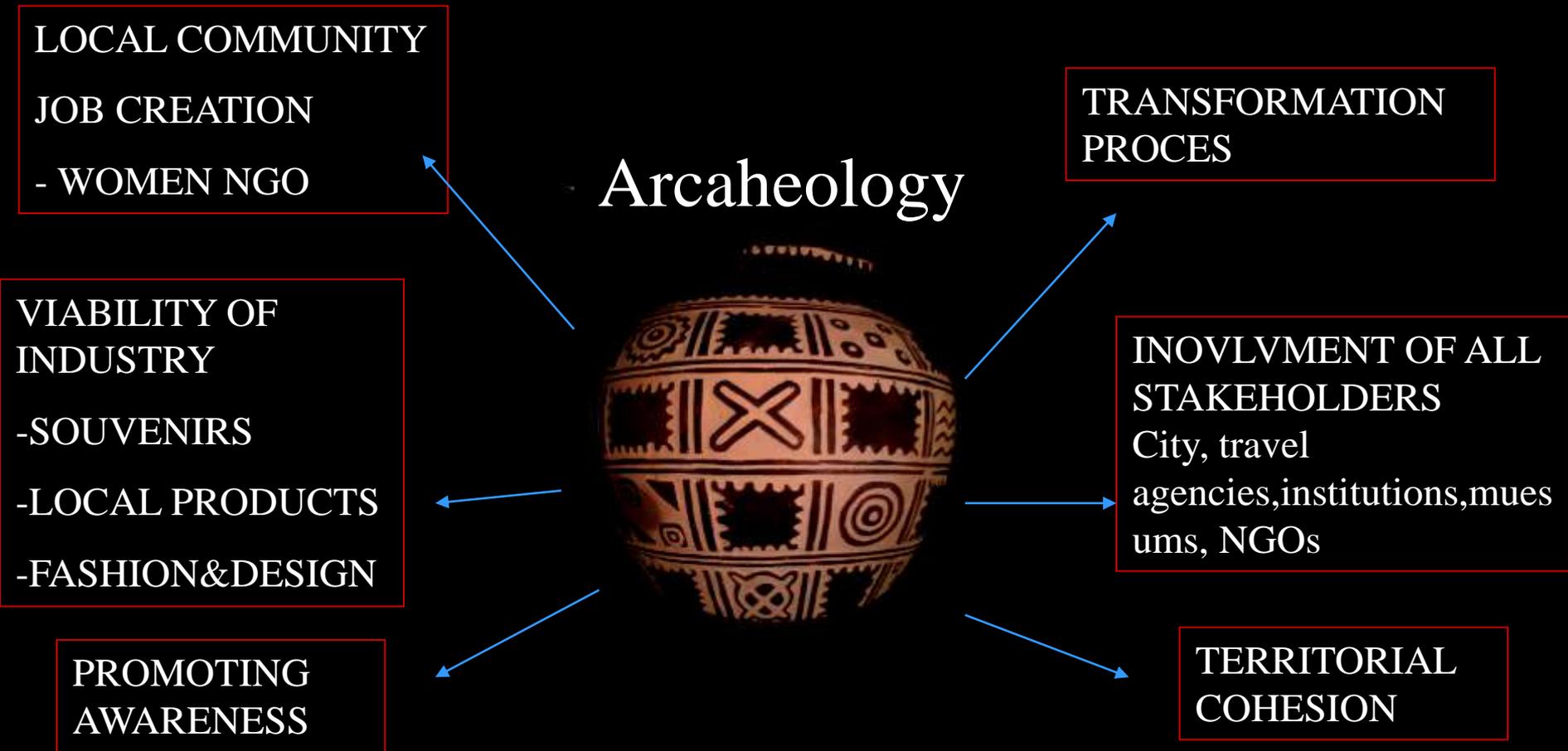
Sustaining meanings – Zadar

Sustaining creative dynamism

Zadar – Polisensual



Sustaining meanings VINKOVCI



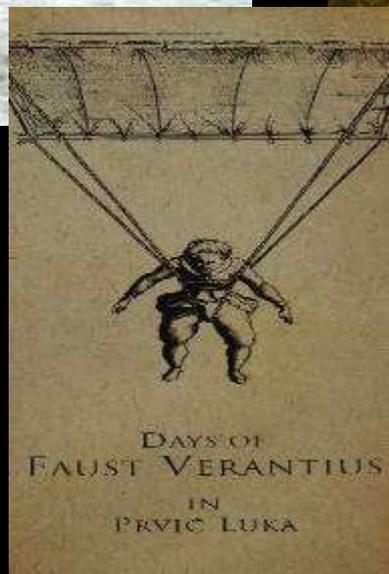
Archaeology, Heritage, Tourism, Community

Sustaining meanings : ROVINJ

Batana Museum - CREATIVE AND UNIQUE



CCE BEST PRACTICES : Creative resources Business club Assessment





Vibrant cities

- Quality
- Uniqueness
- Personality
- Diversity
- Professional support
- Authenticity
- Lifestyle
- Identity
- Space quality

SUSTAINABILITY

Challenges

UNCONNECTED

EXPERIMENTAL
MODELS

Partnership
coordination

Opening
Distribution channels
– travel industry

Visitor
management

Opportunities

Clusters and
routes

Resources
management

identity

Cultural
hubs

Creativity
hubs

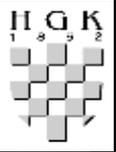


EXPERIENCE



Sustaining meanings

Managing experiences



CONTEMPLATION



REST & WELLNESS



(CULINARY) INSPIRATION

Combining Experience levels



CREATIVITY



PROVOKING REACTION



FUN AND EDUCATION



PARTICIPATION

MODEL DEVELOPMENT

CREATING Theme Oriented Niche Support



Eco tourism

MICE
tourism

Culinary
tourism

Event
tourism

Walking
tourism



Educational
tourism
FFKT7.

Archaeologi
cal tourism

Creative
tourism

Contemplative
tourism

Micro Chic
tourism

Religious
tourism

Future models?

cities – microcosmos – symbolic destinations

**INTEGRATED
MANAGEMENT**
OF CULTURAL AND
NATURAL HERITAGE
HIOLISTIC
**APPROACH TO
DESTINATION**
NEW VISIBILITY

**THEMATIC
APPROACH**

development of
TERITORIAL
NETWORKING
RAISING
AWARENESS OF
COMMON VALUES
AND GOALS

SUSTAINABILITY
ECONOMIC
SOCIAL
CULTURAL

**COMPATIBLE
APPROACH**

- micro-destinations
evaluating
**HISTORIC
IDENTITIES**
- policentric

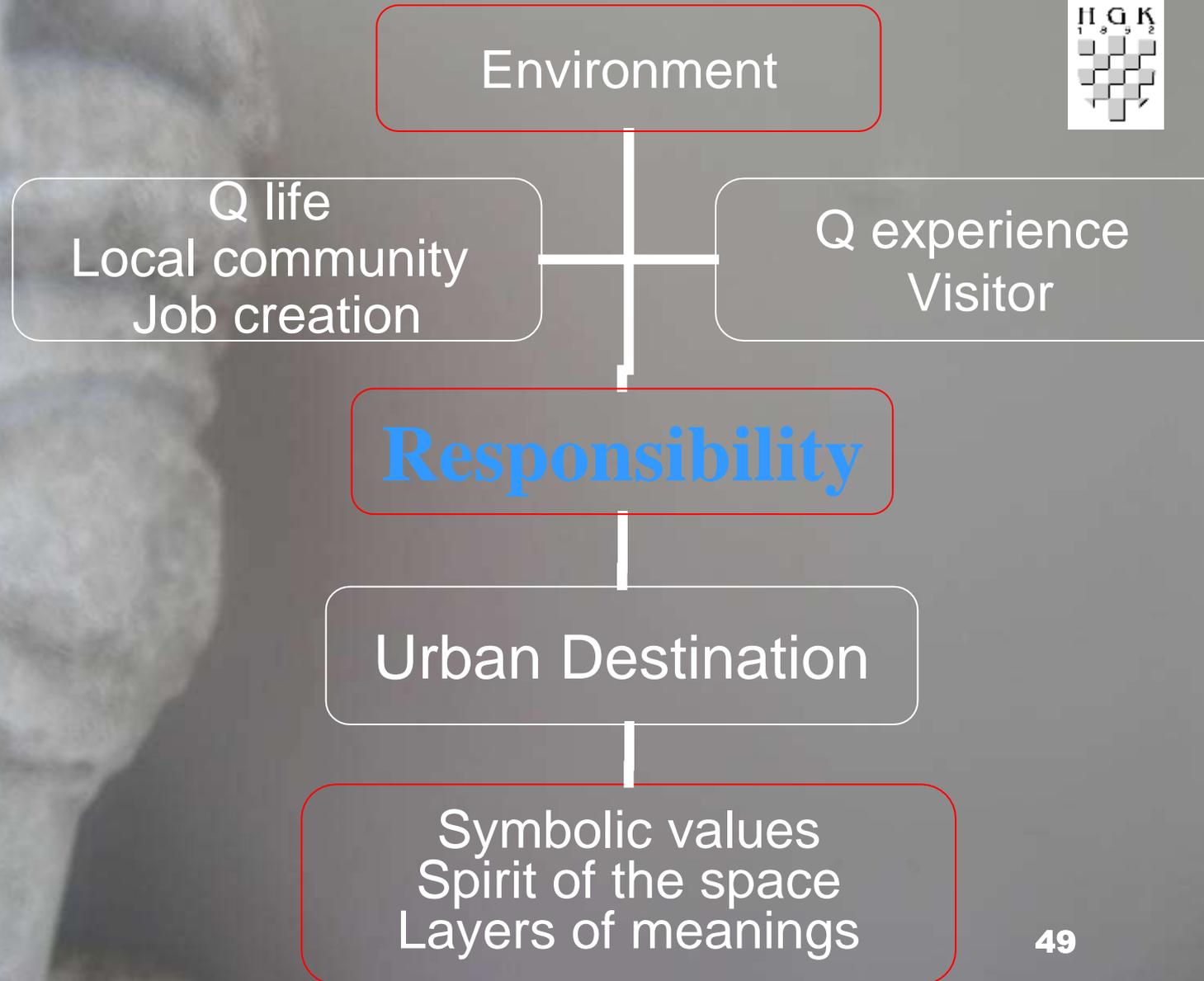
INNOVATIVE APPROACH

NEW PRODUCTS DEVELOP.
INSPIRING DESTINATIONS
FFKT7.

**CONSUMERS
APPROACH-
CONSUMERSPHERE**

- experience management
- holistic recovery

Sustainable Urban Tourism



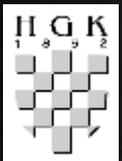
The Future

FRESH COMPETITIVE DISTINCTIVE EUROPEAN MICRO-DESTINATIONS



New quality standards for:

- urban cultural tourism product
- destination identity sustainability



Tourism – A Quest for HAPINESS???



HAPINESS?
PARADISE
LOST

PARADISE REGAINED?

Marcus Aurelius “O world I am in tune with every note of thy great harmony”



**Living cityscapes become mindscapes – soulscapes
Offering meanings as opposed to global placelessness**





HRVATSKA GOSPODARSKA KOMORA

CROATIAN CHAMBER OF ECONOMY



Vlasta Klarić, M. Sc.

Advisor

Tourism Department



+385 (0)1 456-1605



+385 (0)1 482-8499



vklaric@hgk.hr



Croatian Chamber of Economy
Rooseveltov trg 2, HR-10000 Zagreb
www.hgk.hr | hgk@hgk.hr

Croatian Chamber of Economy
TOURISM DEPARTMENT
Roosevelt Sq. 2, Zagreb
Tel. 385 1 4561 570
turizam@hgk.hr