



HRVATSKA GOSPODARSKA KOMORA

CROATIAN CHAMBER OF ECONOMY



# *Experiences and Challenges of Urban Tourism in Croatia – Sustaining Identities*

## *EUROMEETING 2012.*



CCE TOURISM DEPARTMENT



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



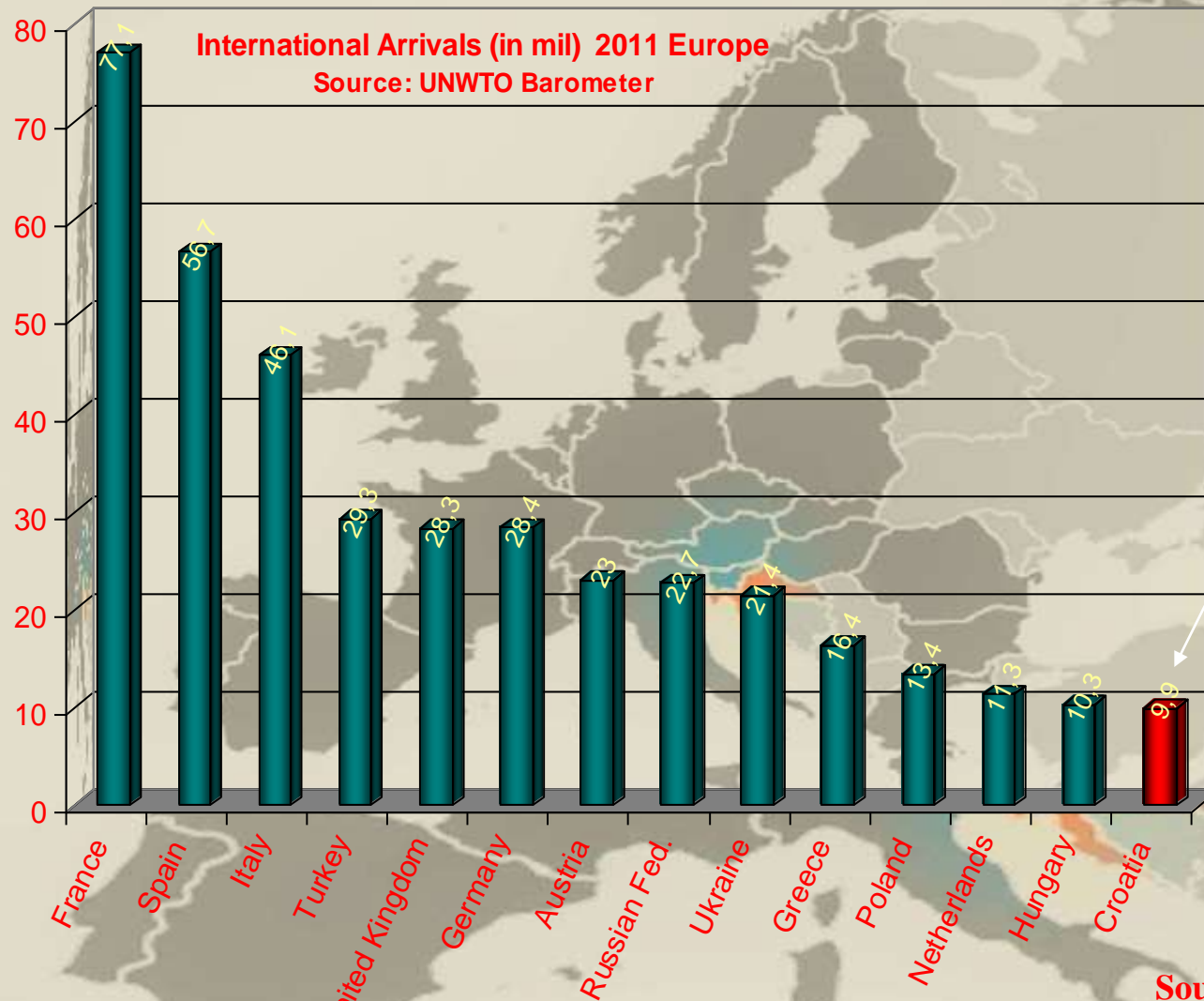
# CROATIAN TOURISM

Pola 1c.  
Vespasian

	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%

# CROATIAN TOURISM 2011

## International Tourist Arrivals



**CROATIA**

20th by  
population

14th by tourist  
arrivals

16th by tourism  
receipts

Source: UNWTO Highlights 2011



# 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:

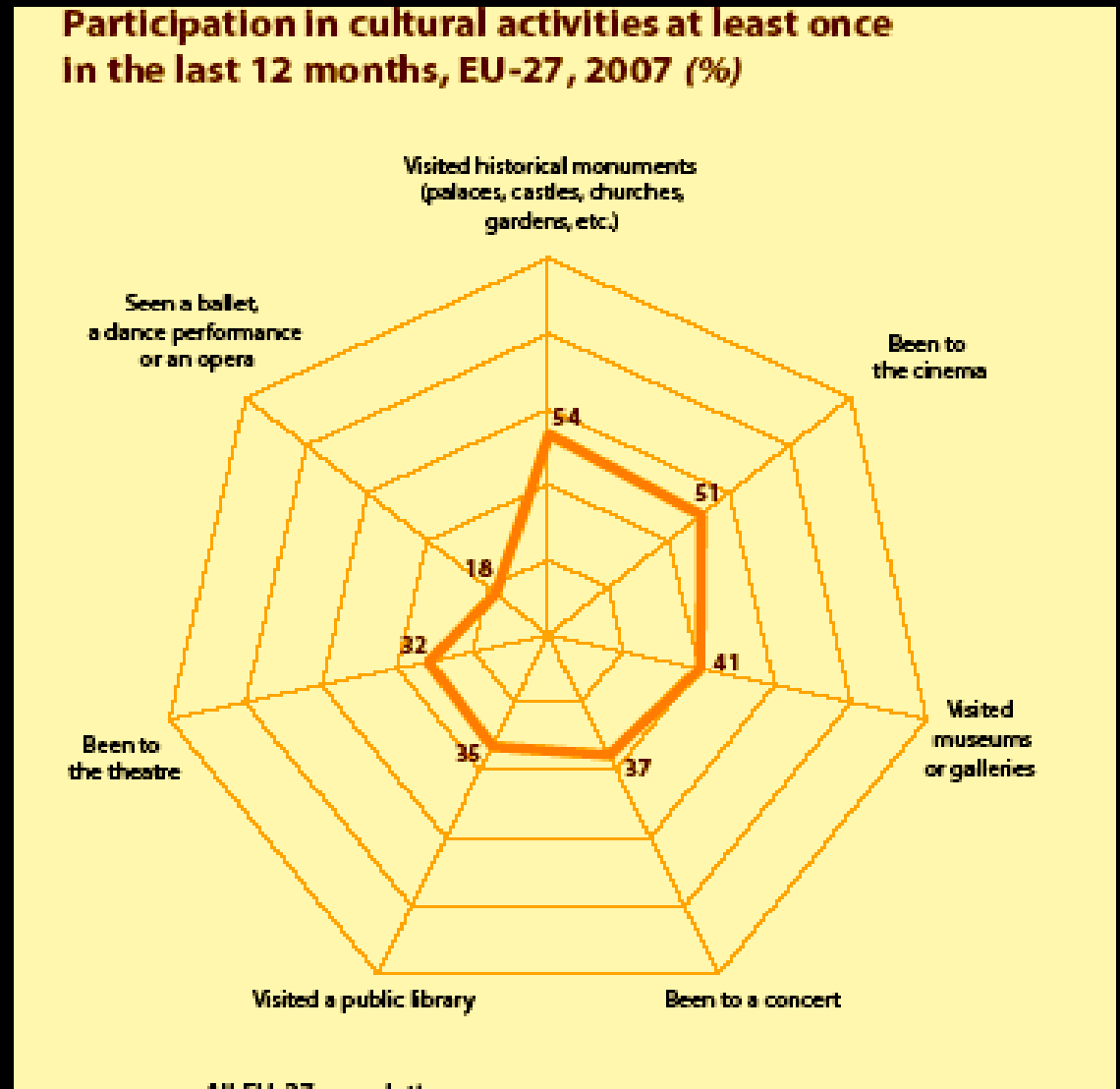
## *Meaningful city experience*



# 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.**



Source: European Commission - Special Eurobarometer 278.

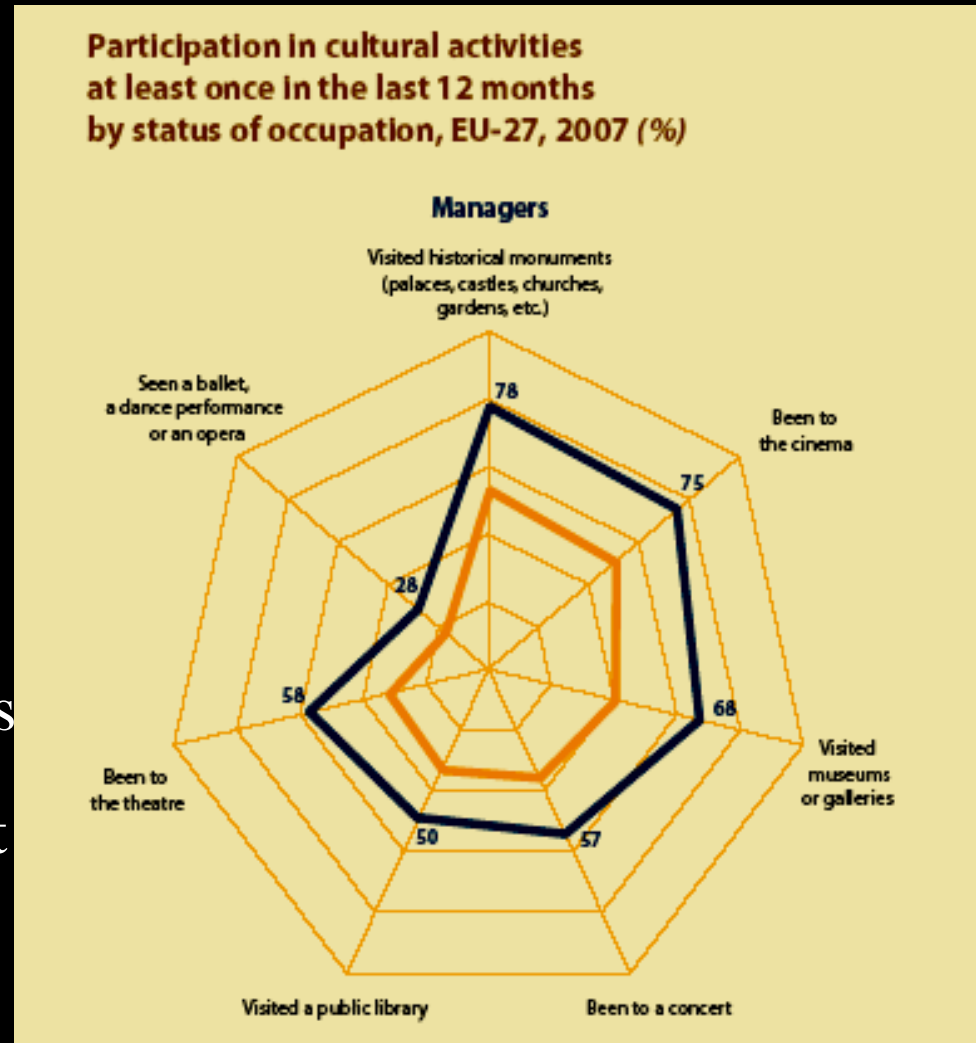


# Who is it for?

## 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
<b>EU27</b>	<b>78</b>	<b>71</b>	<b>54</b>	<b>51</b>	<b>41</b>	<b>37</b>	<b>35</b>	<b>32</b>	<b>18</b>
<b>Belgium</b>	79	65	54	54	42	40	37	33	17
<b>Bulgaria</b>	72	58	30	22	20	28	19	21	9
<b>Czech Rep.</b>	87	82	68	53	44	45	32	44	20
<b>Denmark</b>	89	83	76	69	65	58	68	40	27
<b>Germany</b>	78	81	65	53	48	42	28	37	19
<b>Estonia</b>	93	79	63	34	48	62	51	49	23
<b>Ireland</b>	64	75	51	66	38	49	47	33	13
<b>Greece</b>	71	59	33	46	25	21	15	30	12
<b>Spain</b>	79	59	50	56	38	34	29	25	12
<b>France</b>	64	71	54	63	43	35	33	23	19
<b>Italy</b>	74	63	49	54	34	31	29	26	20
<b>Cyprus</b>	67	56	35	38	25	29	13	25	10
<b>Latvia</b>	90	75	62	36	47	59	39	41	21
<b>Lithuania</b>	90	64	51	33	33	52	32	27	20
<b>Luxembourg</b>	76	72	64	62	54	53	21	40	27
<b>Hungary</b>	87	78	45	36	39	31	33	31	16
<b>Malta</b>	81	45	47	49	34	32	24	25	28
<b>Netherlands</b>	84	84	71	62	62	56	51	58	26
<b>Austria</b>	58	79	50	56	39	43	24	42	18
<b>Poland</b>	81	64	48	41	32	29	37	18	12
<b>Portugal</b>	67	50	35	39	24	23	24	19	9
<b>Romania</b>	75	58	40	22	27	28	22	20	8
<b>Slovenia</b>	86	72	60	47	39	49	53	36	16
<b>Slovakia</b>	92	80	64	50	40	37	42	37	16
<b>Finland</b>	89	79	63	52	51	51	72	48	23
<b>Sweden</b>	88	87	75	71	62	53	70	47	26
<b>UK</b>	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”



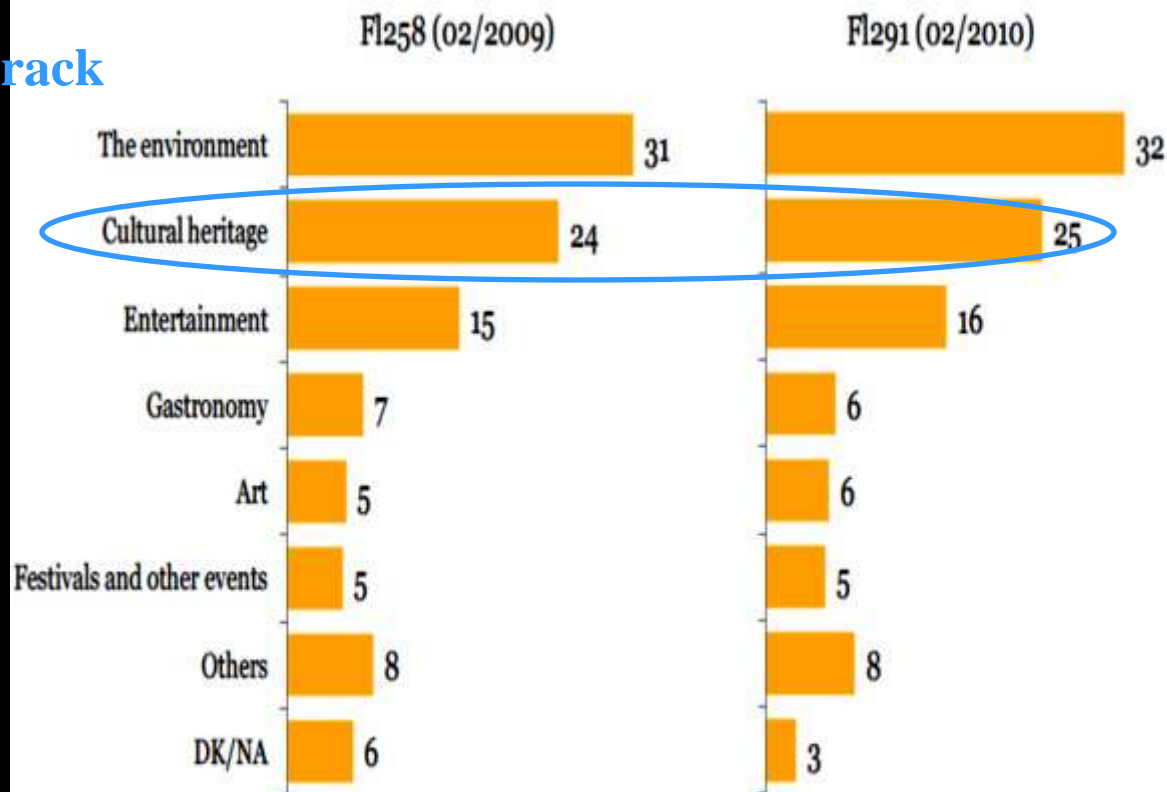


## Flash Eurobarometer

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

eatertainment

Value for  
money

Leaving the zone of  
hipermaterialism

designoholics

Symbolic  
spaces

coherent

Cultural  
concentrations

Emotional search

Authenticity

Individualism

Green consumerism

New healthy  
destinations

-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....**

**(L.M.)**



# 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





# 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

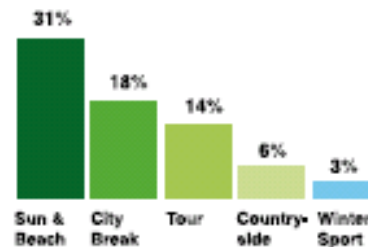
prepared by IPK International on behalf of ITB Berlin  
– THE WORLD'S LEADING TRAVEL TRADE SHOW®

### Main Type of Vacation

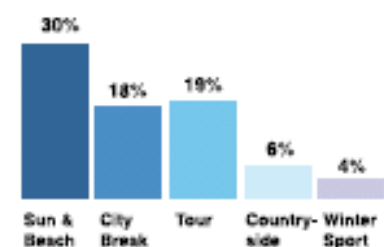
- Poor vs. Rich -



#### LOW INCOME



#### UPPER INCOME



Source: European Travel Monitor® 2010 — IPK International

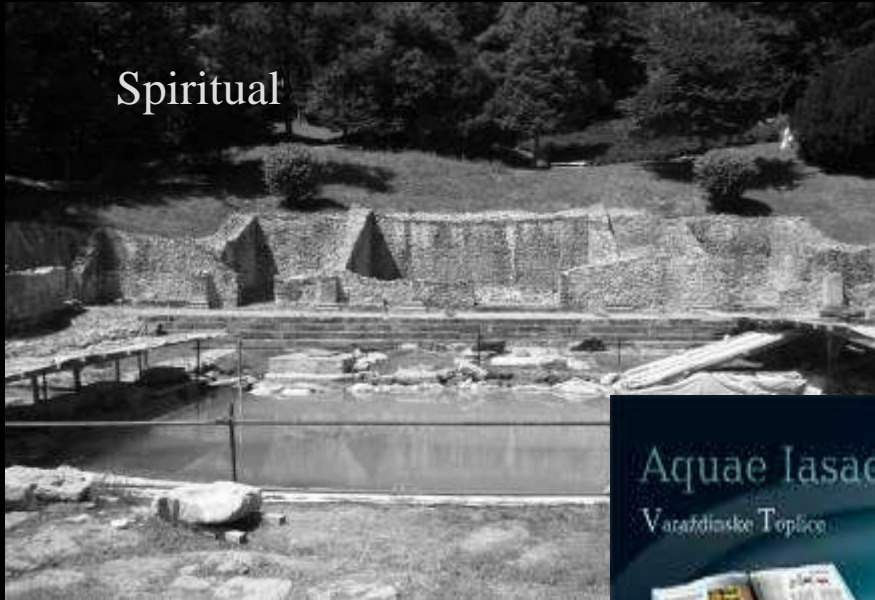
IPK INTERNATIONAL Tourism Research • Tourism Marketing • World Travel Monitor®

Is there Demand for Sustainable Tourism?



# Holistic approach : Know thyself

Spiritual



Events



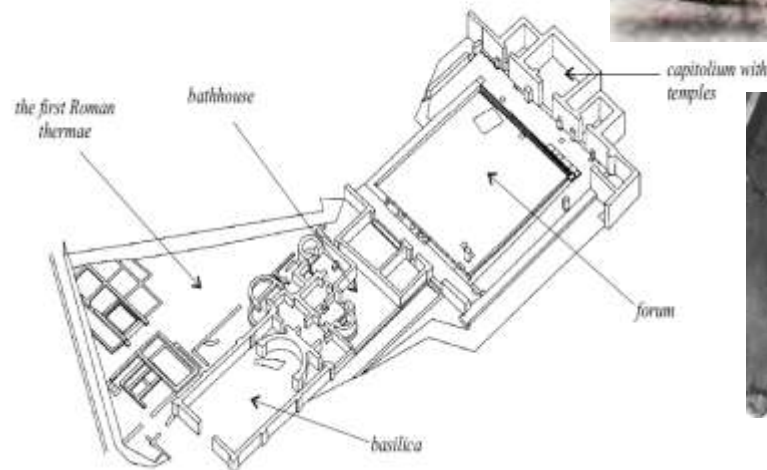
Art

Health

Sports -activities



Cover Page: The Two Millennia of Varazdinske Toplice (Varaždin's Spa)



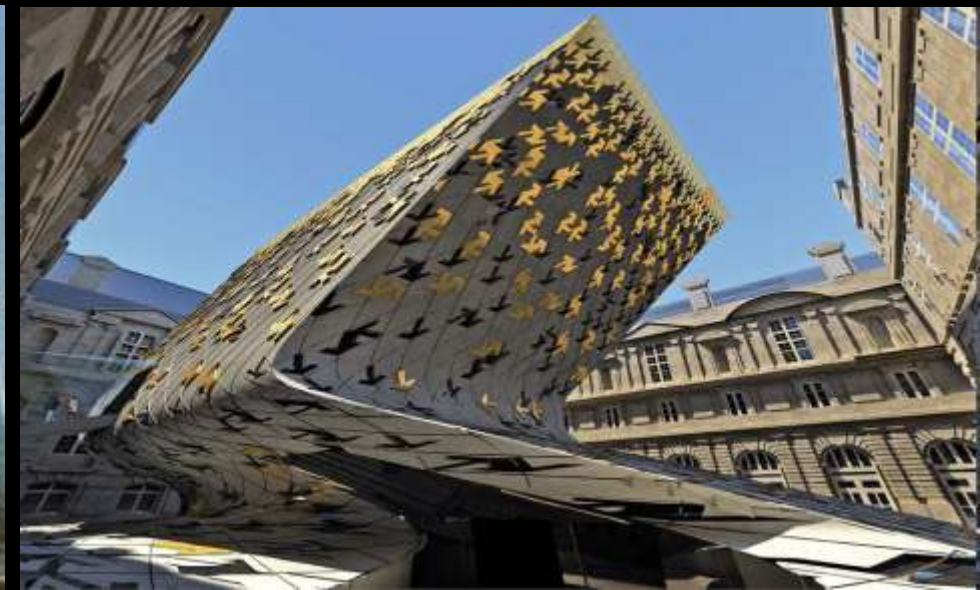


*“Destination building”*





# High investments?





# Challenges – model development



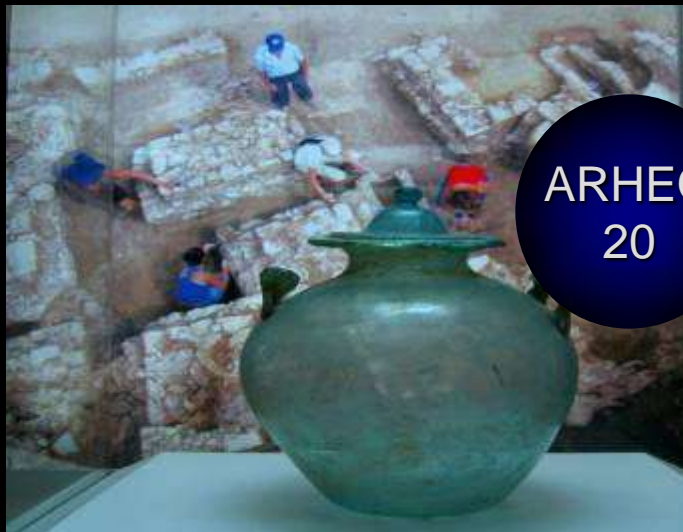
- Lesser developed and destroyed areas
- Touristically virgin areas
- Demography

BUT:  
HUMAN  
MEASURE



# CULTURAL TOURISM AFFILIATION

*promoting integrated approach to sustainability*





**CULTURAL CAPITALS  
HISTORIC THERMAL  
WALLED CITIES**

**networking**

**ICONIC**

**MEGA  
CITIES**

**THEMATIC  
DESTINATIONS**

**HISTORIC**

**INDUSTRIAL  
BAROQUE  
RENEISSANCE  
ROMANESQUE  
ROMAN  
ARCHAEOLOGY**

**MICRO  
CITIES**

**POLITICAL  
BUSINESS**

**CREATIVE CITIES**

**LEISURE**

**ART, EVENTS, FESTIVALS, TRADITION**



# Micro city destinations - In Stone Carved Life stories

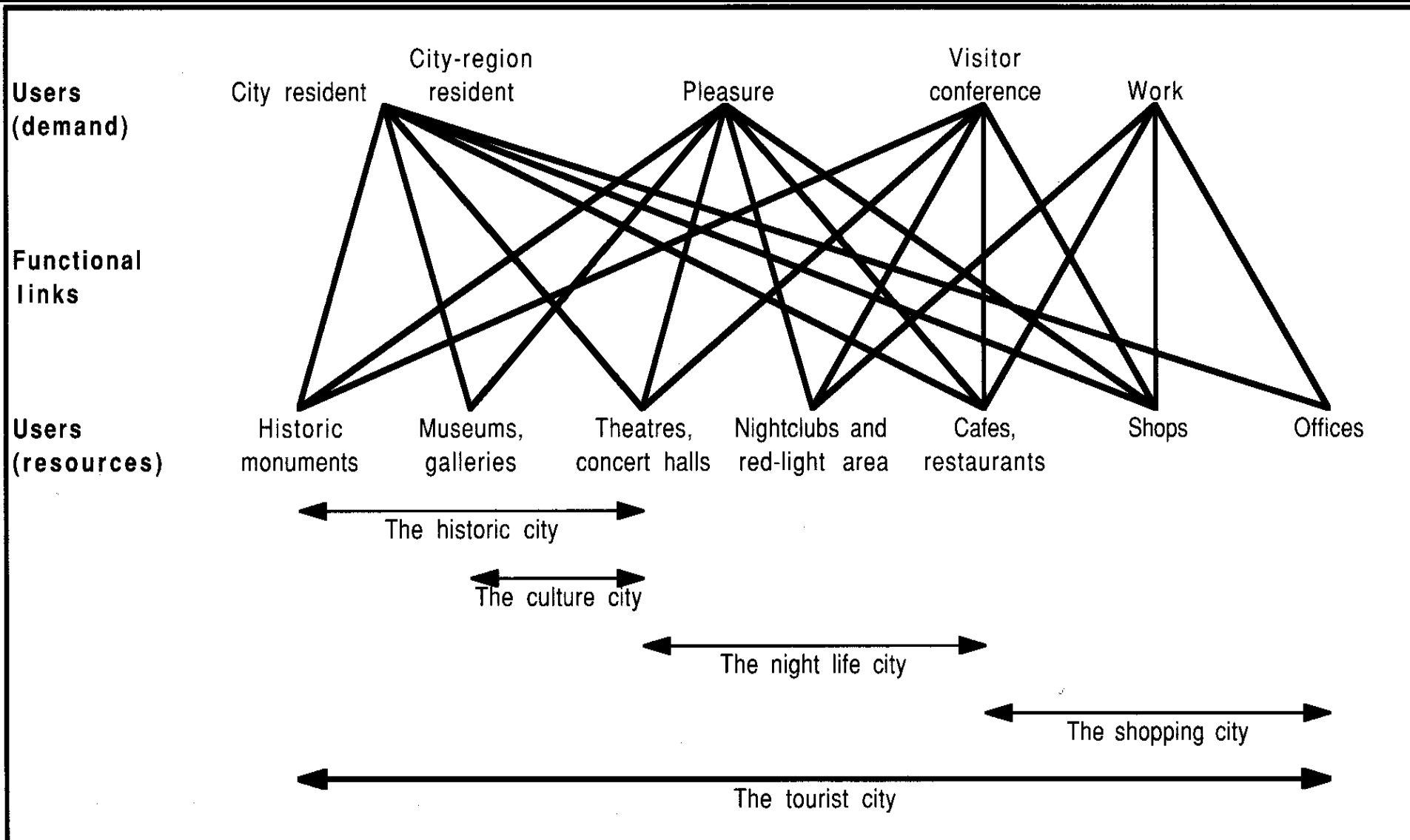


1700 years of the Emperors Palace in Split

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

Sustainability

Signalisation  
and information

Travel agents

Accessibility  
And Parking



CCE



Kitesurfing

playgrounds  
thematic gardens  
walkways

# Sustaining meanings: NIN



## (PRESERVING) ARESTHETICS 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

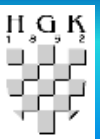
LOHAS

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 volonter..	swamps, rebuilding...	Pottery workshops...
GEN Y LOHAS Millenials	Stimulation Wisdom ....	Mindness Comtemlation ...	Participation express oneself	Language learning..









# Antique glass Museum Creativity through ages



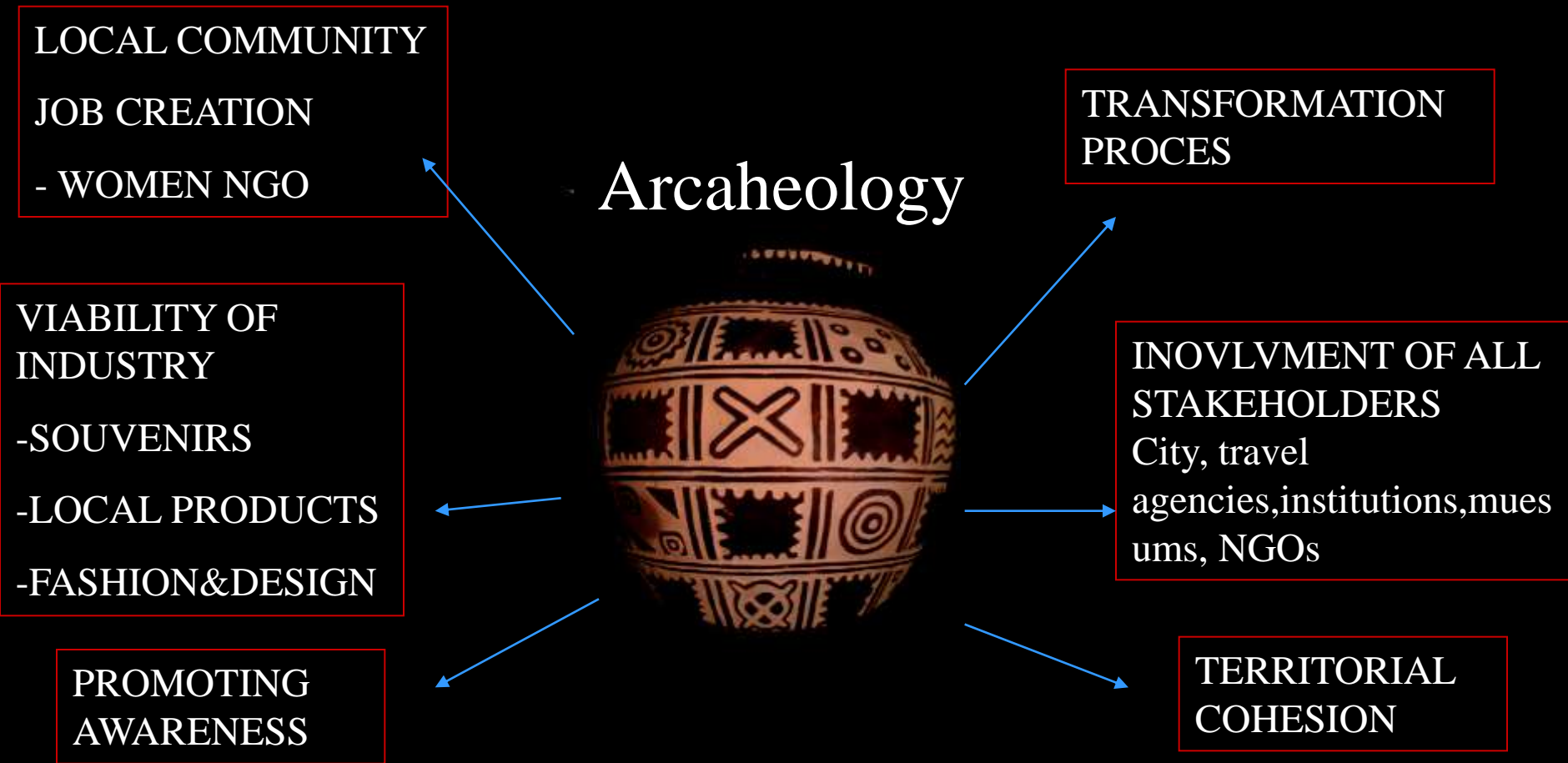
Sustaining meanings – Zadar

# Sustaining creative dynamism

## Zadar – Polisensual



# Sustaining meanings VINKOVCI



## Archaeology, Heritage, Tourism, Community



# Sustaining meanings : ROVINJ

## Batana Museum - CREATIVE AND UNIQUE

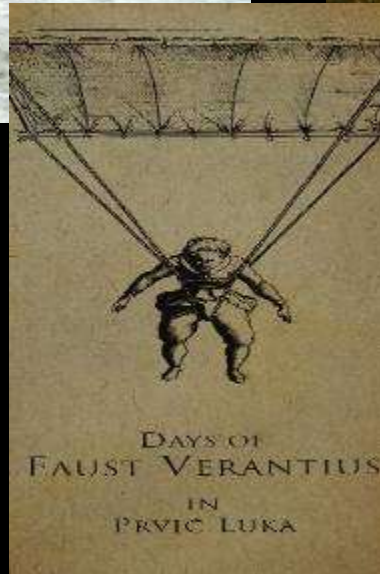




# CCE BEST PRACTICES : Creative resources

## 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



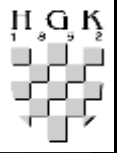
EXPERIENCE





# 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

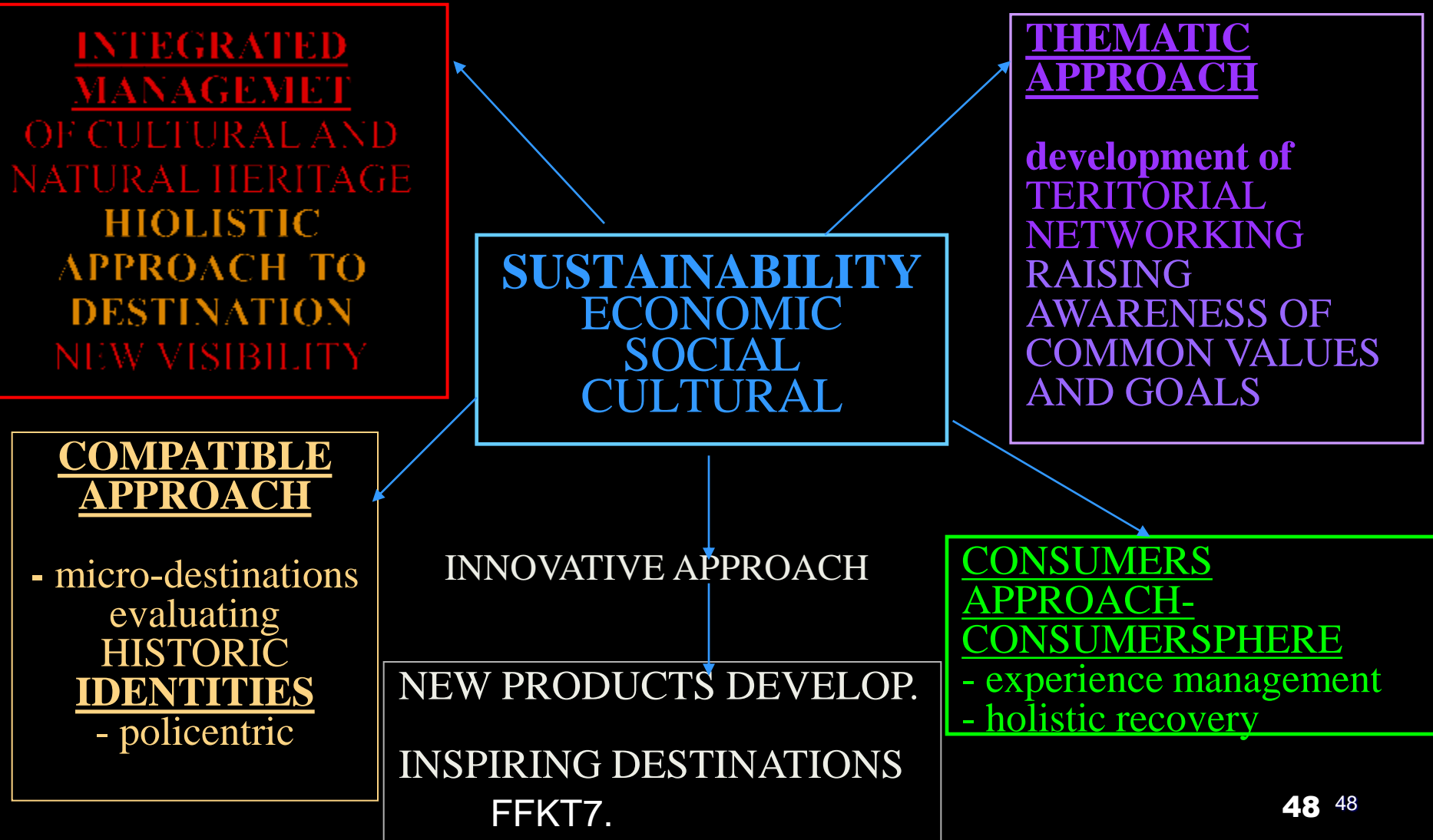
Micro Chic  
tourism

Religious  
tourism



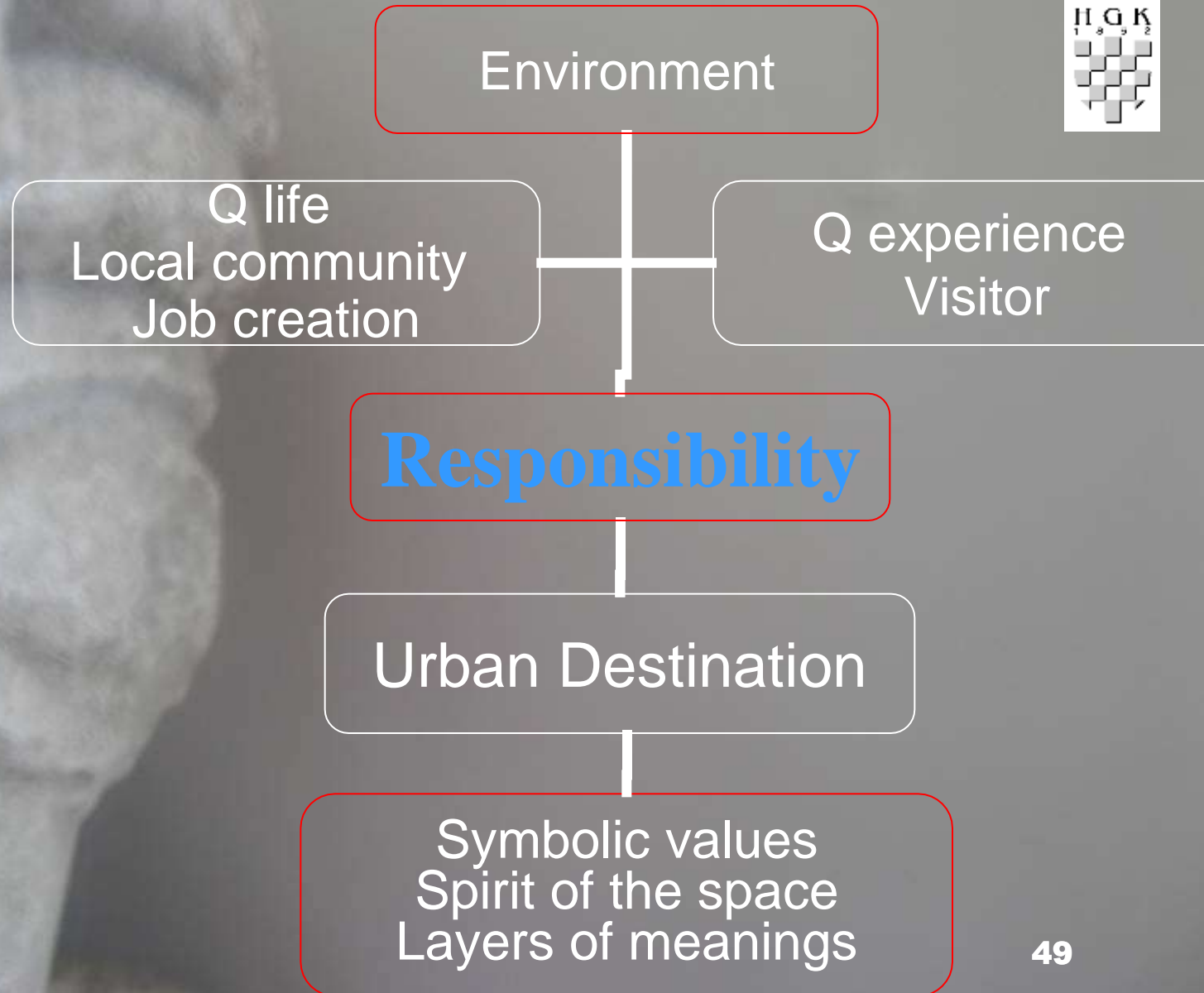
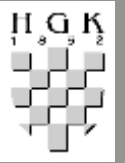
# Future models?

cities – microcosmos – symbolic destinations





# Sustainable Urban Tourism

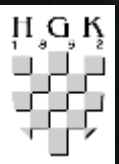


# The Future FRESH COMPETITIVE DISTINCTIVE EUROPEAN MICRO-DESTINATIONS



New quality standards for:

- urban cultural tourism product
- destination identity sustainability



# Tourism – A Quest for HAPINESS???



HAPINESS?

PARADISE  
LOST



# PARADISE REGAINED?

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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**





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