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TOURIST ARRIVALS AND NIGHTS IN COMMERCIAL ACCOMMODATION, NOVEMBER 2024

November 2024 saw a two-digit increase in tourist arrivals and nights compared to November 2023

In the penultimate month of 2024, there were 444 thousand tourist arrivals and 989 thousand tourist nights realised in commercial accommodation establishments, which was an increase of **20.5%** in tourist arrivals and of **20.1%** in tourist nights compared to November 2023.

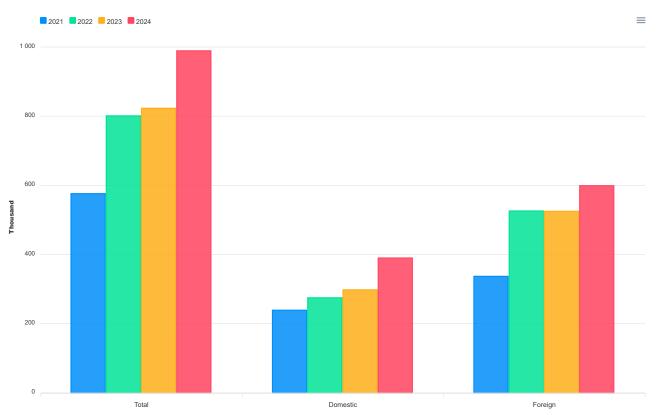
Domestic tourists realised 203 thousand arrivals and 390 thousand nights, which was 30.7% more arrivals and 30.8% more nights than in November 2023.

Foreign tourists realised 241 thousand arrivals and 599 thousand nights, which was 13.0% more arrivals and 14.1% more nights compared to November 2023.

Notice

Detailed monthly data are available on the website of the Croatian Bureau of Statistics, under "PC-Axis databases", where it is possible to browse and print data in various forms. Databases are updated at the monthly basis.

G-1 TOURIST NIGHTS IN NOVEMBER, 2021 – 2024



In November 2024, the most tourist nights were realised by Slovenian tourists

The same as in November 2023, the most foreign tourist nights in November 2024 were realised by tourists from Slovenia, as many as 91 thousand nights, which accounted for 15.3% of the total realised foreign tourist nights. Compared to November 2023, Slovenian tourists realised 23.9% more nights.

These were followed by nights realised by tourists from Austria (11.5%), Germany (11.1%), Italy (6.6%), Bosnia and Herzegovina (6.1%), the USA (5.2%), Serbia (3.9%) and the United Kingdom (3.6%). All tourists from the aforementioned countries realised an increase in the number of nights in November 2024, as compared to November 2023.

61.3% of tourist nights were realised in hotels

The highest number of tourist nights in November 2024 was recorded in hotels, as many as 606 thousand of them, which was 61.3% of the total realised nights. Compared to November 2023, there were 17.1% more tourist nights realised in this type of accommodation.

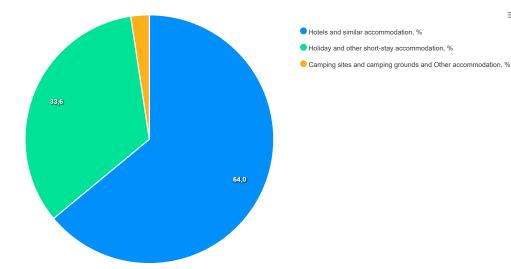
These were followed by tourist nights realised in rooms, apartments, studio-type suits and summer houses, specifically 270 thousand of them, which was 27.3% of the total realised nights. Compared to November 2023, there were 22.7% more tourist nights realised in these types of accommodation.

The City of Zagreb recorded the highest number of tourist nights in November 2024

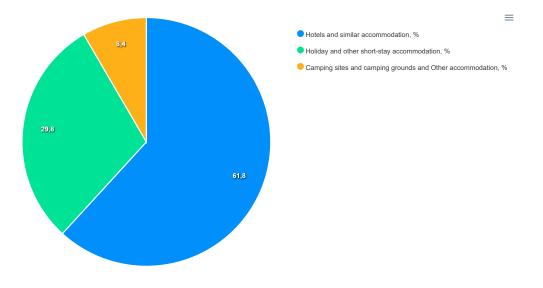
The highest number of tourist nights in November 2024 was realised in the City of Zagreb, as many as 187 thousand of them, which accounted for 18.9% of the total number of tourist nights realised in Croatia. Compared to November 2023, there were 11.0% more tourist nights realised in the City of Zagreb. The County of Istria followed with 167 thousand realised tourist nights and the County of Primorje-Gorski kotar with 163 thousand realised tourist nights. Both the County of Istria and the County of Primorje-Gorski kotar realised an increase in tourist nights in November 2024, as compared to November 2023

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G-2 STRUCTURE OF DOMESTIC TOURIST NIGHTS ACCORDING TO DIVISION 55 OF NKD 2007, NOVEMBER 2024



G-3 STRUCTURE OF FOREIGN TOURIST NIGHTS ACCORDING TO DIVISION 55 OF NKD 2007, NOVEMBER 2024



The most rooms and permanent beds were available in the group Hotels and similar accommodation

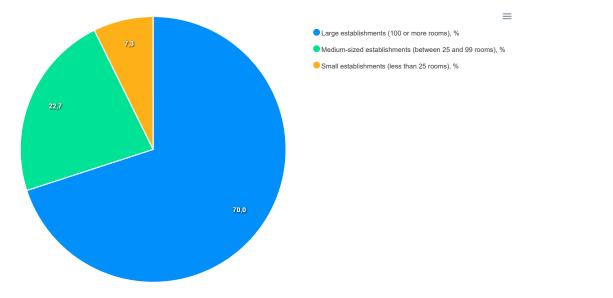
In November 2024, there were 98 thousand rooms, apartments and camping sites, with a total of 237 thousand permanent beds available to tourists.

Tourists had the largest number of rooms and apartments at their disposal in the group Hotels and similar accommodation, as many as 43 thousand of them (which was 43.6% of the total number of available rooms and apartments), with 86 thousand permanent beds (which was 36.2% of the total number of available permanent beds). In November 2024, the average (net) occupancy rate of bedrooms was 34.3% and of permanent beds it was 28.7%.

Tourists aged 35 to 44 years realised the most nights in November 2024

In November 2024, tourists aged 35 to 44 years realised the most tourist nights, as many as 191 thousand of them (which accounted for 19.3% of the total realised nights). These were followed by tourist nights realised by tourists aged 45 to 54 years, with 183 thousand nights (which accounted for 18.5% of the total realised nights).

G-4 STRUCTURE OF TOURIST NIGHTS IN THE GROUP HOTELS AND SIMILAR ACCOMMODATION, BY THE SIZE OF ESTABLISHMENTS, NOVEMBER 2024



In the first eleven months of 2024, there was an increase in both tourist arrivals and nights compared to the same period of 2023

In the first eleven months of 2024, there were 19.8 million tourist arrivals and 92.8 million tourist nights realised in commercial accommodation establishments, which was 3.8% more arrivals and 1.4% more nights compared to the same period of 2023.

Domestic tourists realised 2.7 million arrivals and 8.4 million nights in the first eleven months of 2024, which was an increase of 8.8% in tourist arrivals and 7.6% in tourist nights compared to the same period of 2023.

In the first eleven months of 2024, foreign tourists realised 17.1 million arrivals and 84.4 million nights, which was 3.1% more arrivals and 0.8% more nights compared to the same period of 2023.

Tourists from Germany realised the most foreign tourist nights, as many as 21.0 million of them (which accounted for 24.9% of the total realised foreign tourist nights). They were followed by tourists from Slovenia (9.3%), Austria (8.8%), Poland (8.0%), the Czech Republic (5.5%), the United Kingdom (4.4%), Italy and Hungary (4.3% each), Slovakia (3.6%) and the Netherlands (3.5%).

1 TOURIST ARRIVALS AND NIGHTS

		Arriv	vals		Nights				
	XI 2024	I – XI 2024	Indices <u>XI 2024</u> XI 2023	Indices <u>I – XI 2024</u> I – XI 2023	XI 2024	I – XI 2024	Indices <u>XI 2024</u> XI 2023	Indices <u>I – XI 2024</u> I – XI 2023	
Total	444 234	19 835 722	120,5	103,8	988 958	92 803 506	120,1	101,4	
Domestic tourists	203 016	2 695 349	130,7	108,8	389 604	8 401 825	130,8	107,6	
Foreign tourists	241 218	17 140 373	113,0	103,1	599 354	84 401 681	114,1	100,8	

2 TOURIST ARRIVALS AND NIGHTS, BY COUNTIES, NOVEMBER 2024

		Total	Domestic	Foreign	Indices <u>XI 2024</u> XI 2023				
					Total	Domestic	Foreign		
Republic of Croatia	Arrivals	444 234	203 016	241 218	120,5	130,7	113,0		
	Nights	988 958	389 604	599 354	120,1	130,8	114,1		
County of Zagreb	Arrivals	9 575	4 335	5 240	116,5	117,8	115,4		
	Nights	17 253	7 573	9 680	110,0	110,7	109,5		
County of Krapina-Zagorje	Arrivals	13 666	9 626	4 040	106,9	115,8	90,4		
	Nights	29 638	19 865	9 773	104,4	112,9	90,7		
County of Sisak-Moslavina	Arrivals	2 306	1 304	1 002	143,8	142,8	145,0		
	Nights	5 919	4 122	1 797	166,3	190,7	128,5		
County of Karlovac	Arrivals	8 236	3 803	4 433	108,7	131,0	94,9		
	Nights	12 935	6 240	6 695	96,9	122,7	81,0		
County of Varaždin	Arrivals	6 970	4 607	2 363	120,3	128,6	106,9		
	Nights	15 420	10 602	4 818	112,0	111,4	113,3		
County of Koprivnica-Križevci	Arrivals	1 307	917	390	106,8	116,7	89,0		
	Nights	2 751	1 771	980	117,6	135,2	95,1		
County of Bjelovar-Bilogora	Arrivals	2 321	1 772	549	80,8	80,3	82,4		
	Nights	6 284	4 946	1 338	90,1	95,0	75,6		
County of Primorje-Gorski kotar	Arrivals	63 752	32 458	31 294	134,2	163,2	113,3		
	Nights	162 600	67 976	94 624	130,3	164,1	113,5		
County of Lika-Senj	Arrivals	10 855	4 571	6 284	129,7	168,7	111,0		
	Nights	18 161	7 938	10 223	134,0	173,0	114,0		
County of Virovitica-Podravina	Arrivals	1 486	1 121	365	126,6	127,0	125,4		
	Nights	3 139	2 339	800	119,2	121,3	113,5		
County of Požega-Slavonia	Arrivals	2 098	1 737	361	100,1	99,7	102,3		
	Nights	5 126	4 484	642	111,5	114,1	96,3		
County of Slavonski Brod-Posavina	Arrivals	3 375	1 746	1 629	132,0	116,7	153,5		
	Nights	5 206	2 743	2 463	116,4	122,0	110,6		
County of Zadar	Arrivals	22 208	12 156	10 052	113,8	129,7	99,0		
	Nights	49 874	22 290	27 584	119,2	136,6	108,1		
County of Osijek-Baranja	Arrivals	13 875	10 725	3 150	116,0	118,7	107,4		
	Nights	24 756	18 509	6 247	112,7	118,8	97,8		
County of Šibenik-Knin	Arrivals	16 250	12 093	4 157	150,5	160,3	127,8		
	Nights	35 974	21 863	14 111	153,2	153,8	152,4		
County of Vukovar-Srijem	Arrivals	9 448	8 496	952	96,1	96,1	96,2		
	Nights	14 982	13 068	1 914	100,8	99,9	107,3		
County of Split-Dalmatia	Arrivals	50 365	20 920	29 445	121,3	141,2	110,3		
	Nights	116 005	38 526	77 479	110,7	131,5	102,6		
County of Istria	Arrivals	57 248	22 083	35 165	136,2	130,0	140,5		
	Nights	167 379	47 446	119 933	134,5	130,2	136,3		
County of Dubrovnik-Neretva	Arrivals	41 762	8 498	33 264	106,9	117,3	104,5		
	Nights	92 322	18 050	74 272	123,0	124,1	122,7		
County of Međimurje	Arrivals	8 190	6 048	2 142	122,3	138,1	92,6		
	Nights	15 902	10 865	5 037	114,5	132,6	88,4		
City of Zagreb	Arrivals	98 941	34 000	64 941	115,6	121,5	112,7		
	Nights	187 332	58 388	128 944	111,0	120,5	107,2		

3 TOURIST ARRIVALS AND NIGHTS, BY THE SIZE OF ESTABLISHMENTS FROM THE GROUP 55.1 HOTELS AND SIMILAR ACCOMMODATION, NOVEMBER 2024

	Number of	Number of permanent beds	Arrivals			Nights		
	rooms and apartments		Total	Domestic	Foreign	Total	Domestic	Foreign
Republic of Croatia	42 837	85 713	316 920	140 944	175 976	619 824	249 336	370 488
Small establishments (less than 25 rooms)	3 663	7 458	26 966	12 787	14 179	45 264	19 202	26 062
Medium-sized establishments (between 25 and 99 rooms)	9 750	18 859	81 764	39 650	42 114	140 458	64 383	76 075
Large establishments (100 or more rooms)	29 424	59 396	208 190	88 507	119 683	434 102	165 751	268 351
Large establishments (between 100 and 249 rooms)	16 089	32 807	128 604	55 512	73 092	255 934	101 822	154 112
Large establishments (250 or more rooms)	13 335	26 589	79 586	32 995	46 591	178 168	63 929	114 239

NOTES ON METHODOLOGY

The purpose of the statistical survey

The purpose of the statistical survey Tourist Arrivals and Nights is to monitor the tourist activity realised in commercial accommodation establishments and to provide internationally comparable data in accordance with European standards for tourism statistics. The results of this survey ensure the basic indicators necessary for the analysis of tourism in the Republic of Croatia. The basic indicators are the following: tourist arrivals and nights by country of residence, types of accommodation establishments, tourists by sex and age groups, mode of arrival as well as the number of rooms and permanent beds.

Legal basis

The survey is implemented on the basis of the Official Statistics Act (NN, Nos 25/20 and 155/23) and the Regulation (EU) No 692/2011 of the European Parliament and of the Council concerning European statistics on tourism.

Observation units

The observation units are all legal entities and natural persons that provide overnight accommodation services, as well as natural persons who provide hospitality services in households and on private family farms.

The Hospitality and Catering Industry Act (NN, Nos 85/15, 121/16, 99/18, 25/19, 98/19, 32/20, 42/20 and 126/21) defines the manner and conditions under which legal entities and natural persons can provide overnight accommodation in an accommodation establishment.

Sources and methods of data collection

The data source for the statistical survey on tourism activity (the number of tourist arrivals and nights) and accommodation establishments is the eVisitor system. The Croatian Bureau of Statistics takes over the data from the administrative source eVisitor system from the Croatian National Tourist Board on a monthly basis and further processes them statistically. Monthly data are downloaded on the seventh day of the month for the previous month.

All legal entities and natural persons that provide overnight accommodation services in an accommodation establishment, as well as natural persons who provide hospitality services in households and on private family farms, according to the Ordinance on the eVisitor system (NN, No 43/20), check in and check out tourists via the eVisitor system, as the central electronic system for checking in and checking out tourists in the Republic of Croatia.

Coverage and comparability

This statistical survey covers accommodation establishments that are categorised in the groups Hotels, Camping sites and Other accommodation establishments pursuant to the Hospitality and Catering Industry Act (NN, Nos 85/15, 121/16, 99/18, 25/19, 98/19, 32/20, 42/20 and 126/21). The Minister of Tourism prescribes the types of accommodation establishments within these groups in an ordinance.

According to the Ordinance on the Classification, Categorisation and Special Standards of Accommodation Establishments in the group Hotels (NN, Nos 56/16 and 120/19), the types of accommodation establishments are the following: hotels, heritage hotels, all-suite hotels, integral hotels, diffuse hotels, special-standard hotels, spa-type accommodation, tourist resorts, tourist apartments, boarding houses and guest houses.

According to the Ordinance on the Classification and Categorisation of Accommodation Establishments in the group Camping sites (NN, Nos 75/08, 54/16, 68/19 and 120/19), the types of accommodation establishments are the following: camping sites, glamping, small camps and quickstop camping.

According to the Ordinance on the Classification and Categorisation of Accommodation Establishments in the group Other accommodation establishments (NN, Nos 54/16 and 69/17), the types of accommodation establishments are the following: rooms, apartments, studio-type suites, holiday houses, overnight accommodations, vacation establishments for children, hostels, mountain lodges, hunting lodges, pupils' homes or students' homes or akademis and Robinson-type accommodation establishments.

According to the Ordinance on the Classification and Categorisation of Establishments Providing Hospitality and Catering Services in Households (NN, Nos 9/16, 54/16, 61/16, 69/17 and 120/19), accommodation establishments in households are the following: rooms, suites, studio-type

suites, holiday houses, camping sites, quickstop camping and Robinson-type accommodation (quickstop camping – Robinson-type accommodation).

According to the Ordinance on the Classification and Categorisation of Establishments Providing Hospitality and Catering Services on Private Family Farms (NN, Nos 54/16, 69/17 and 120/19), these are the following: rooms, suites, rural holiday houses, camping sites, quickstop camping and Robinson-type accommodation (quickstop camping – Robinson-type accommodation).

Pursuant to Article 29 of the Hospitality and Catering Industry Act (NN, Nos 85/15, 121/16, 99/18, 25/19, 98/19, 32/20, 42/20 and 126/21), this statistical survey also covers organised off-site camping sites. During sports, scout, cultural/artistic and similar events as well as during organised trips in canoes and similar vessels on sea, rivers and lakes, or by bikes etc., organised off-site camping is allowed on spaces provided for it.

This statistical survey also covers the following establishments providing accommodation services: spas, inns offering accommodation services and uncategorised establishments.

Pursuant to the Regulation (EU) No 692/2011 of the European Parliament and of the Council concerning European statistics on tourism, data on tourist arrivals and nights in the Republic of Croatia according to the NKD 2007, division 55, groups 55.1 Hotels and similar accommodation, 55.2 Holiday and other short-stay accommodation and 55.3 Camping sites and camping grounds are submitted to Eurostat on a monthly basis. Data submitted for the group 55.1 Hotels and similar accommodation also include information on occupancy rates of permanent beds and rooms (net). The mentioned data are published on the Eurostat's website http://ec.europa.eu/eurostat and are comparable to EU Member States data.

Pursuant to the Decision of the Government of the Republic of Croatia on the Introduction of Temporary Protection in the Republic of Croatia for Displaced Persons from Ukraine of 7 March 2022, the citizens of Ukraine are granted temporary protection in accordance with the Act on International and Temporary Protection (NN, Nos 70/15, 127/17 and 33/23). Persons from Ukraine who have not requested temporary protection in the Republic of Croatia use the service of accommodation in a short-stay accommodation establishment and pay for the accommodation service. Therefore, they are registered in the eVisitor system and are considered tourists.

The data do not include non-commercial tourist traffic (the stay of owners and their relatives and friends in apartments and holiday houses as well as of tourists in other establishments where accommodation service is not charged, e.g., when they are accommodated by citizens of a tourist town/municipality). Non-commercial tourist traffic is covered by a separate statistical survey.

Confidentiality

Aggregate data for which there are reasons for keeping their confidentiality in line with the Official Statistics Act (NN, Nos 25/20 and 155/23) and with the Regulation (EC) No 223/2009 of the European Parliament and of the Council concerning European statistics are treated as confidential and are not published.

Definitions

Tourism means the activity of visitors taking a trip to or staying in a main destination outside their usual environment for less than a year, for the purposes of leisure, business or other personal purposes other than to be employed by a resident entity in the place visited.

eVisitor is the central electronic system for checking in and checking out tourists that serves to link all tourist boards in the Republic of Croatia. It is available via internet with no need for any additional software installations.

The tourist registry in the eVisitor system is kept separately for each individual legal entity and natural person offering accommodation services as part of the hospitality and catering activity (boarding houses, hotels, hostels, etc.), or on a sea vessel as part of the nautical tourism (charter, cruising), as well as accommodation services in households and rural households.

Checking in and checking out the tourists who are entered into the eVisitor system is authorised on the basis of a secure access to the eVisitor authentication protocol which ensures the conditions for a safe and correct electronic check-in and check-out.

Establishing and running the eVisitor system is the responsibility of the Croatian National Tourist Board (CNTB).

CNTB is a national tourist organisation founded in order to create and promote the identity and reputation of Croatian tourism, to plan and implement a common strategy and concept of its promotion, to propose and perform promotional activities of mutual interest for all entities in tourism in the country and abroad, as well as to raise the overall quality of the entire tourist offer in the Republic of Croatia. The head office of the CNTB is situated in Zagreb. The duties of the President of the Croatian National Tourist Board are undertaken by the Minister of Tourism.

Tourist is any person who, outside his/her place of usual residence, spends at least one night in a hotel or some other tourist accommodation establishment for reasons of rest, recreation, health, study, sport, religion, family, business, public missions or meetings. Excluded are persons residing at a place for longer than 12 consecutive months, persons whose main reason for visiting is an activity that is financed from the place of visit, persons who travel to their work place or an education institution on a daily or weekly basis, persons coming into or going out of the country as migrants, frontier workers, diplomats, consular representatives and military force members on their regular duties, displaced persons, nomads and persons in transit.

Domestic tourist is any person permanently residing in the Republic of Croatia who spends at least one night in a hotel or some other tourist accommodation establishment outside his/her place of permanent residence.

Foreign tourist is any person permanently residing outside the Republic of Croatia who temporarily resides in the Republic of Croatia and who spends at least one night in a hotel or some other tourist accommodation establishment.

Tourist arrival is the number of persons (tourists) who were registered and stayed overnight in an accommodation establishment. Consequently, in case tourists change the accommodation establishment they stay in, they are re-registered, which results in data ambiguity. Statistics thus registers the number of tourist arrivals and not the number of tourists.

Tourist nights refer to every registered overnight stay of a person (tourist) in an accommodation establishment.

Residence is the place where a person settles with the intention of a permanent stay.

Age group of tourists is presented according to the years of age at the time of stay in a tourist accommodation establishment.

Accommodation capacities are presented as the number of rooms, apartments and camping sites, and the number of permanent beds. The application of the Regulation (EU) No 692/2011 of the European Parliament and of the Council concerning European statistics on tourism means that the capacity of an accommodation establishment presented is taken over from the month when it reached its maximum.

Permanent beds are those that are regularly available to guests.

Occupancy rate of permanent beds (net) in the reference period is obtained by dividing the total number of nights by the number of beds on offer and the number of days when the beds are actually available for use during the reference period. The data is expressed as a percentage.

Occupancy rate of bedrooms (net) in the reference period is obtained by dividing the total number of bedrooms used during the reference period by the number of bedrooms available for use during the reference period. The data is expressed as a percentage.

Occupancy rate of permanent beds (gross) in the reference period is obtained by dividing the total number of nights by the number of beds on offer and the number of days in the month. The data is expressed as a percentage.

According to Regulation (EU) No 692/2011 of the European Parliament and of the Council concerning European statistics on tourism, the criterion for determining the size of a tourist accommodation establishment from the group Hotels and similar accommodation is the number of rooms and apartments (accommodation units). Tourist accommodation establishments from the group 55.1 Hotels and similar accommodation are classified according to the number of rooms and apartments into:

– small establishments: less than 25 rooms

- medium-sized establishments: between 25 and 99 rooms

- large establishments: 100 or more rooms, sub-divided into two groups: between 100 and 249 rooms, and 250 or more rooms.

Division 55 of the NKD 2007 includes the provision of short-stay accommodation services to tourists. Particular units may only provide accommodation services, while others may combine the services of accommodation, catering and/or recreation equipment. Tourist accommodation establishments listed in this division are broken down into four groups.

Group 55.1 Hotels and similar accommodation includes the following types of accommodation establishments: hotels, heritage hotels, all-suite hotels, integral hotels, diffuse hotels, spa-type accommodation, special standard hotels, tourist resorts, tourist apartments, boarding houses and guest houses.

Group 55.2 Holiday and other short-stay accommodation includes rooms, apartments, studio-type suites, summer houses, rural summer houses, hostels, spas, overnight accommodation, vacation establishments for children, inns offering accommodation services, mountain lodges, hunting lodges, pupils' homes or students' homes and Robinson-type accommodation establishment.

Group 55.3 Camping sites and camping grounds include camping sites, glamping, small camps, quickstop camping, quickstop camping in households – Robinson-type accommodation, quickstop camping on private family farms – Robinson-type accommodation, and organised off-site camping sites.

Group 55.9 Other accommodation includes uncategorised establishments.

Territorial constitution

Data by counties, cities and municipalities are given by the territorial constitution according to the Act on County, City and Municipality Areas in the Republic of Croatia (NN, Nos 86/06, 125/06, 16/07, 95/08, 46/10, 145/10, 37/13, 44/13, 45/13 and 110/15).

Abbreviations

EU	European Union
Eurostat	Statistical Office of the European Union
NKD 2007	National Classification of Activities, 2007 version
NN	Narodne novine, official gazette of the Republic of Croatia
USA	United States of America

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