



CROATIA TOURISM INTELLIGENCE FOR HOSPITALITY LEADERS

Croatia Tourism Brief

2026 Peak-Season Readout

Croatia's tourism data, reconciled and explained. Demand, source markets, regions, connectivity and price pressure, read on identical source windows against the full 2025 baseline.

OVERNIGHTS, JAN-JUL 2026

59.1M

+0.7% vs Jan-Jul 2025 | HTZ provisional

2025 BASELINE OVERNIGHTS

110.1M

HTZ | full year | all accommodation

HEADLINE UNIVERSE GAP

+16.1%

HTZ total vs DZS commercial | reconciled inside

PRIMARY PUBLICATION WINDOWS

HTZ / eVisitor	All registered guest nights: commercial + non-commercial + nautical	Data through 2026-07-01 Retrieved 2026-08-23 Status success
DZS tourism (BS_TU13/14)	Commercial accommodation only; audited official series	Data through 2026-06-01 Retrieved 2026-08-23 to 2026-08-24 Status success

Other cutoffs: DZS CPI 2026-07-01; ECB FX 2026-08-21; Eurostat air 2026-02-01; DZS borders 2026-06-01; DZS ports 2026-06-01.

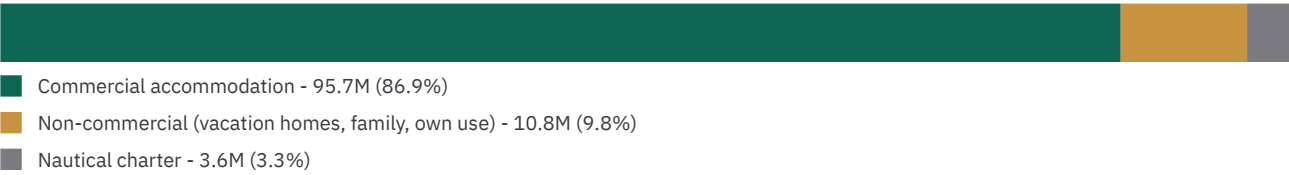
All 2026 figures are provisional partial-window readings. Each comparison uses an identical source window.

Croatia publishes two different truths. Both are right.

Ask "how many overnights did Croatia record in 2025?" and the state gives two answers: 110,132,564 (HTZ, the tourist board's eVisitor system) or 94,820,989 (DZS, the statistics bureau) - +16.1% apart. Neither is wrong. HTZ counts every registered guest night - including stays in non-commercial vacation homes and nautical charter. DZS measures commercial accommodation only, on an audited methodology. Strip the universes to the common commercial core and the two series land within +1.0% of each other.

RECONCILIATION BOX · OVERNIGHTS, FULL YEAR 2025		Jan-Dec 2025
MEASURE	HTZ / EVISITOR	DZS
Headline total, as published The two numbers that circulate in the press	110.1M	94.8M
Commercial accommodation only Same universe - the honest comparison	95.7M	94.8M
Non-commercial stays Vacation homes, staying with family, own-use	10.8M	not measured
Nautical charter	3.6M	not measured
Arrivals (headline)	21.8M	20.7M
Gap on the common commercial universe (HTZ commercial vs DZS)		+1.0%

What sits inside the HTZ headline



Decomposition of the 110.1M HTZ 2025 overnights by accommodation universe. DZS's 94.8M corresponds to the commercial segment only. Sources: HTZ eVisitor YTD December 2025; DZS BS_TU13 full-year 2025.

2026 so far: the same season, told twice

The two systems also run at different speeds: HTZ currently reaches 2026-07-01, DZS 2026-06-01. The latest month both cover is June, so the honest 2026 comparison window is January-June. On that common window HTZ's commercial series grew +0.3% and DZS grew +0.5% - the same story of a flat first half, told by both institutions, with levels +1.5% apart.

RECONCILIATION BOX · OVERNIGHTS, 2026 SEASON TO DATE		Jan-Jun 2026 · common window · provisional	
MEASURE	HTZ / EVISITOR	DZS	
All accommodation HTZ universe incl. non-commercial + nautical	29.5M	not measured	
Commercial accommodation YoY: HTZ +0.3% · DZS +0.5%	26.4M	26.0M	
Arrivals, commercial	7.3M	7.3M	
Gap on the common commercial universe (HTZ commercial vs DZS)		+1.5%	

Which number for which decision

DECISION	USE	WHY
In-season steering, pickup pacing, market-mix moves	HTZ	Fast eVisitor registrations; one month ahead of DZS; includes the whole guest universe.
Board packs, bank covenants, investor reporting	DZS	Audited official statistics on a stable commercial-accommodation definition; comparable with Eurostat.
Year-on-year growth claims in public material	Either - never both	Both series agree on direction; absolute levels differ by universe. Mixing sources across years fabricates growth.
Competitive-supply and capacity analysis	DZS	Capacity (beds, rooms) is a DZS series; pairing DZS demand with DZS supply keeps the universes aligned.
Non-commercial pressure on destinations (second homes)	HTZ only	DZS does not measure non-commercial overnights; HTZ is the only official window into that segment.

ŠTO OVO ZNAČI ZA VAS · WHAT THIS MEANS

- Quote one source per document and name it. The headline-universe gap is +16.1%; an unnamed mix of the two reads as an error to any diligent reader.
- When a competitor, bank or journalist cites a number that looks +16% away from yours, check the universe before checking the maths - it is almost always HTZ-vs-DZS, not a mistake.
- Both systems agree the first half of 2026 was flat (HTZ +0.3%, DZS +0.5%). Do not let a single-source growth claim change your rate strategy.

Sources, universes, cutoffs

Every figure is computed at render time from a versioned materialised view. Each chart and caption names a source; match it to this register for institution, universe, publication window, immutable retrieval evidence and ingestion status. Source publication does not imply endorsement of Adria Signal.

INSTITUTION / SERIES	UNIVERSE / TREATMENT	EVIDENCE
HTZ / eVisitor Hrvatska turistička zajednica	All registered guest nights: commercial + non-commercial + nautical Release: Monthly XLSX. Reuse: Public business-intelligence releases, attributed.	Data through 2026-07-01 Retrieved 2026-08-23 Status success
DZS tourism (BS_TU13/14) Državni zavod za statistiku	Commercial accommodation only; audited official series Release: Monthly, about two-month lag. Reuse: Open dissemination with attribution.	Data through 2026-06-01 Retrieved 2026-08-23 to 2026-08-24 Status success
DZS CPI (ME_PS09) Državni zavod za statistiku	Consumer prices by ECOICOP category; national universe Release: Monthly. Reuse: Open dissemination with attribution.	Data through 2026-07-01 Retrieved 2026-08-23 Status success
DZS border crossings Državni zavod za statistiku / MUP	Non-Schengen frontiers only since 2023 Release: Monthly. Reuse: Open dissemination with attribution.	Data through 2026-06-01 Retrieved 2026-08-23 Status success
DZS sea ports (WPX01, BS_T1) Državni zavod za statistiku	Port passenger traffic + cruise voyages; national universe Release: Monthly / quarterly. Reuse: Open dissemination with attribution.	Data through 2026-06-01 Retrieved 2026-08-23 Status success
Eurostat air (avia_paoc) Eurostat	Passengers through Croatian civil airports; national universe Release: Monthly, multi-month lag. Reuse: Eurostat open reuse policy.	Data through 2026-02-01 Retrieved 2026-05-24 Status success
ECB reference rates European Central Bank	Daily EUR reference rates; 14 currencies Release: Daily. Reuse: ECB open data, attributed.	Data through 2026-08-21 Retrieved 2026-08-23 Status success
Open-Meteo historical Open-Meteo	Daily weather; 11 Croatian coastal cities Release: Daily; seasonal context only. Reuse: Open licence (CC-BY).	Data through 2026-04-01 Retrieved 2026-05-24 Status success

Pojmovi / glossary: turistička noćenja, državni smještaj i međugodišnje usporedbe.

What this brief does not contain: hotel ADR, RevPAR, achieved rates, booking-platform data, review sentiment, or any per-property benchmark.

Those require consented or licensed data and are excluded rather than approximated.

From evidence to a licence decision

This sample shows the same reconciliation method, typography, source treatment and limitations used in the paid Brief. The complete edition applies that discipline to the questions below.

- 01 Is the 2026 season growing, and on which official series?
- 02 Which source markets are gaining or slipping on identical year-to-date windows?
- 03 How far is tourism-price inflation running ahead of demand?
- 04 Which access and market-mix signals should change the 2027 plan?

LICENCE OPTIONS

Prices are stated for evaluation. Licence scope and deliverables are confirmed in the written offer.

Brief - €349 + VAT	Individual internal-use licence for the full 2026 Peak-Season Readout.
Decision Edition - €499 + VAT	Includes the Brief individual internal-use licence, a 45-minute executive briefing, a one-page decision summary, and methodology support.
Institutional - €990 + VAT	Team/institutional licence, a 60-90-minute briefing, and one regional or segment appendix.

Request a written offer or a 20-minute review

Write to ivan@mojradnik.com.hr with your organisation, role and intended number of internal users. No response time is promised in advance.



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