

Strategic Roadmap for ETNOsphere: Rebrand, Market Positioning, and Digital Transformation

Executive Summary: The Pivot from Service Provider to Destination Brand

The tourism landscape of Zagreb is currently undergoing a structural metamorphosis, transitioning from a transient stopover on the route to the Adriatic into a mature, standalone European city-break destination. As indicated by the 2025 performance metrics, which saw Croatia record 21.8 million arrivals and a resilient 5.6 million overnight stays in the continental region¹, the capital has established a year-round demand baseline that supports sophisticated cultural products. For **ETNOsphere**, this macroeconomic stability presents a critical window for strategic evolution. However, the current operational reality—characterized by brand fragmentation between the corporate "ETNOsphere" identity and the consumer-facing "Hearts of Zagreb" label—serves as a bottleneck to capturing the full value of this market expansion.

This report provides a decision-grade analysis of the path forward. The core thesis of this strategy is that ETNOsphere must cease operating merely as a provider of folklore services and instead establish itself as a "Destination Brand"—a singular, definitive evening entertainment product that functions as a synonym for Zagreb culture, much as the *Folklore Garden* defines the category in Prague or the *Moulin Rouge* defines it in Paris. The analysis reveals that the Zagreb market currently suffers from a "middle-tier vacuum": while high art (LADO Ensemble) and casual dining (traditional restaurants) are well-represented, there is a distinct lack of a high-capacity, all-inclusive, professionally staged evening spectacle that caters to the B2B incentive market and the experiential B2C traveler simultaneously.

Commercial viability analysis suggests that the current pricing models in Zagreb (~€40–€50) are undervalued compared to regional competitors in Central Europe, where similar products command €65–€90 when packaged with unlimited beverages and logistical support. By restructuring the product architecture to align with these international norms, implementing a "Master Brand" strategy that unifies the fragmented identity, and deploying a conversion-led digital ecosystem, ETNOsphere can capture a projected Total Addressable Market (TAM) of 150,000–200,000 annual covers. This report details the data-driven roadmap for this transformation, covering market dynamics, competitive positioning, pricing architectures, distribution channel optimization, and the information architecture required for a high-performance web presence.

1. Market Demand and Commercial Viability Analysis

To determine the commercial viability of a revitalized ETNOsphere, one must first dissect the intersection of macroeconomic tourism trends in Zagreb and the microeconomic behavioral shifts of the post-2025 "cultural traveler." The data suggests a market that is not only growing in volume but also maturing in sophistication, yet remains underserved in the specific category of "evening entertainment."

1.1 Macro-Tourism Dynamics: The Rise of Continental Croatia

The historical narrative of Croatian tourism has been dominated by the "sun and sea" model, but 2024–2025 data indicates a significant decoupling of continental performance from coastal seasonality. While the Adriatic coast continues to absorb the lion's share of the 110.1 million total overnight stays¹, the continental region, anchored by Zagreb, has demonstrated a resilience that underpins the viability of a year-round cultural business. The record shows a 2% year-on-year increase in continental overnight stays, reaching 5.6 million.² This figure is critical; it represents a stable "base load" of potential customers that exists independent of the summer heatwaves that drive coastal traffic.

Seasonality remains a factor, but its curve is flattening in favorable ways for a folklore product. The data highlights a "record-breaking December" with over one million overnight stays nationwide, heavily concentrated in Zagreb due to the "Advent in Zagreb" festival.³ This creates a unique dual-peak season for ETNOsphere: the traditional summer peak (July/August) driven by transit tourists and long-haul travelers⁵, and a winter peak (December) driven by regional European visitors seeking festive cultural experiences. A business model reliant solely on summer traffic would be vulnerable, but Zagreb's emergence as a winter destination mitigates this risk, allowing ETNOsphere to retain core staff and venue contracts year-round.

Furthermore, the "City Break" typology dominant in Zagreb—characterized by shorter stays of 1.8 to 2.5 nights—creates a "hyper-compressed" itinerary for the visitor. In such a constrained timeframe, tourists rarely have the luxury of "discovering" hidden gems; they rely on pre-validated, high-impact experiences. A traveler with only two nights in the city has exactly two "dinner slots" available. Competing for one of these slots requires a value proposition that transcends mere sustenance; it must promise a "definitive" cultural encounter. The market demand, therefore, is not just for food, but for *time efficiency*—the ability to consume cuisine, history, music, and social interaction in a single, curated three-hour window.

1.2 Micro-Market Demand: The "Evening Gap" in Zagreb

Analysis of traveler forums and nightlife guides reveals a consistent friction point in the Zagreb visitor experience: the "Quiet Night" phenomenon. Tourists frequently describe

Zagreb's nightlife as bifurcated between high-energy techno clubs/bars on Tkalčićeva Street (catering to the 18–30 demographic) and quiet, passive dining experiences.⁶ There is a pronounced lack of "Middle Ground" entertainment suitable for the 35–65 demographic, families, and corporate groups who desire energy and engagement but are not interested in clubbing.

Reviews of existing products confirm that when this gap is filled, satisfaction is high. Travelers explicitly praise the "energy," "fun," and "warmth" of hands-on workshops and folklore shows, noting that these experiences serve as the emotional highlight of their trip.⁸ The "Hearts of Zagreb" workshop reviews on TripAdvisor demonstrate a high willingness to pay for interaction—tourists are paying €47–€65 not just to watch, but to do (e.g., making Licitar hearts, dancing).⁹ This signals a shift in demand from the "Passive Observer" model (watching a stage from a distance) to the "Active Participant" model. Commercially, this is significant because "active" products command higher price points and generate stronger word-of-mouth referrals.

However, the current market supply is polarized. On one end exists the **LADO Ensemble**, the national professional body, which offers "high art" performances of impeccable quality but operates on a sporadic concert hall schedule that is inaccessible to the spontaneous tourist.¹¹ On the other end are traditional restaurants like **Okrugljak** or **Vinodol**, which offer excellent food and perhaps a tambourine band in the corner, but lack the structured narrative, costumes, and educational components of a true "show".¹² ETNOsphere's opportunity lies in the "Commercial Professional" space between these two poles: offering the production value and costumes of LADO with the accessibility and gastronomy of a restaurant.

1.3 Commercial Viability Assessment

To assess the financial feasibility of a rebranded folklore product, we must look to regional benchmarks in Prague and Budapest, cities with similar Austro-Hungarian architectural heritage and tourism flows.

In Prague, the **Folklore Garden** operates a daily industrial-scale operation, charging between €54 and €65 per head.¹⁴ Their model includes hotel transfers, a 4-course meal, and—crucially—**unlimited drinks**. This pricing architecture suggests that the Central European market standard for this product category is significantly higher than the current Zagreb average. In Budapest, river cruises offering folklore and operetta command prices upwards of €90.¹⁵

Contrast this with the current state of **Hearts of Zagreb / ETNOsphere**, where pricing appears to hover around €30–€40 for the show/dinner combination, or €60 for a combined workshop.¹⁶ This price discrepancy indicates that the Zagreb product is currently undervalued. The commercial viability of raising prices to the €65+ range is supported by the "Value-Added" nature of the product. If ETNOsphere can replicate the "all-inclusive" model

(food + show + drinks + potentially transport), it can unlock significantly higher margins.

With 5.6 million overnights, capturing even a conservative 0.5% market share (28,000 guests) at a revitalized price point of €65 yields a revenue baseline of €1.82 million. Given the relatively low cost of local ingredients (poultry, pork, wine) and the fixed cost of performers, the contribution margin on incremental guests is high. The primary commercial risk is not a lack of demand, but a lack of *volume* driven by poor visibility. The market is there; the distribution channel is the bottleneck.

2. Competitive Landscape and Positioning Gaps

The competitive landscape for ETNOsphere is complex, characterized by direct competitors who are often fragmented or low-quality, indirect competitors who dominate the dining scene, and regional competitors who set the standard for what international B2B buyers expect.

2.1 Direct Competitor Audit: The "Hearts of Zagreb" Identity Crisis

The most immediate competitive threat to ETNOsphere comes, paradoxically, from within. The research reveals a confusing dual-brand strategy involving **ETNOsphere** and **Hearts of Zagreb**. Both entities list their primary venue as **Hrvatska kuća (Preradovićeva 31)**¹⁷, and both offer overlapping services involving folklore and dining.

Hearts of Zagreb appears to be the consumer-facing (B2C) brand utilized on Online Travel Agencies (OTAs) like Viator and Expedia. It positions itself as an "Ambassador of Croatian Culture" with 8 years of experience.¹⁷ However, its brand health is volatile. While some reviews praise the "super fun hands-on cultural experience," others are damning, with one Viator review explicitly citing a "Very bad experience".⁸ This inconsistency is toxic for a premium rebranding effort. If ETNOsphere is the parent company, it is currently absorbing the reputational drag of the Hearts of Zagreb brand.

ETNOsphere, conversely, presents as a corporate, B2B-facing entity, emphasizing "Incentive programs" and "Savoury gastronomic experiences".¹⁸ The website language is somewhat archaic ("grandmothers' cookbooks"), and the positioning feels more like a service provider (a troupe for hire) than a destination venue.

The Positioning Gap: There is no single, unified "Master Brand" that screams *premium quality* and *reliability*. The current setup feels like a small, family-run operation—charming, perhaps, but lacking the scalability and trust required by major international tour operators. The market needs a brand that projects the confidence and operational scale of a professional theater, not a hobbyist workshop.

2.2 Indirect Competitor Audit: The "Restaurant Traditionalists"

These venues compete for the "dinner slot" on the tourist itinerary. They offer the *software* (food and music) but lack the *hardware* (the stage, the lighting, the narrative).

Competitor	Positioning	Strengths	Weaknesses
Okrugljak	The "Grande Dame" of Zagreb dining. ¹²	Deep heritage, elite reputation among locals, high-end clientele, scenic location under Mount Medvednica.	Price prohibitive (€€€€). Located in the suburbs (Mlinovi), requiring a taxi. Music is ambient, not a focal "show."
Restoran Vinodol	City center staple. ¹³	High volume capacity, consistent food quality, Sunday music sessions.	It is a restaurant first; the noise level is high, and there are no folklore costumes or storytelling elements.
Konoba Didov San	"Grandpa's Dream" – Authentic Dalmatian Hinterland. ¹⁹	Highly specific, niche cuisine (frogs, eel, "uštipci"). Very cozy, intimate atmosphere in Upper Town.	Venue capacity is small, making it unsuitable for large groups. Cuisine is regional (Dalmatian), not representative of Pan-Croatian folklore.
Kaptolska Klet	Family-friendly tourist hub. ²⁰	Prime location opposite the Cathedral. Large terrace. Long history of hosting groups.	Often perceived as a "tourist trap" with generic food. Lacks the "boutique" cultural feel.

Analysis: None of these competitors offer a structured *program*. A guest at Okrugljak eats dinner while a band plays. A guest at ETNOsphere should *attend a show* where dinner is served. This distinction is the core positioning gap. ETNOsphere must sell "The Night Out," not

just "The Meal."

2.3 The "Gold Standard" Benchmark: LADO Ensemble

LADO represents the pinnacle of Croatian folklore.¹¹ They are the "Broadway" to ETNOsphere's "Dinner Theater." Their costumes are museum-grade, and their performances are technically flawless. However, they perform infrequently and in concert halls like Lisinski.²¹

Strategic Opportunity: ETNOsphere should not try to *be* LADO (which requires state subsidy levels of funding), but should position itself as the *accessible alternative*. The marketing narrative should be: "Can't catch the LADO annual concert? Experience the same spirit, intimacy, and artistry tonight at ETNOsphere."

2.4 International Benchmarks: The Model to Replicate

Zagreb is currently losing efficiency compared to its Central European peers. The **Folklore Garden in Prague** sets the operational standard.¹⁴ It is a machine:

1. **Logistics:** Bus transfers pick up guests from hotels.
2. **Product:** A "mansion" venue dedicated solely to the show.
3. **Offer:** 4 courses + Unlimited Drinks.
4. **B2B Friction:** Zero. Agencies book it blindly because it is consistent.

Budapest utilizes its river geography to bundle folklore with sightseeing.¹⁵ While Zagreb lacks a navigable Danube through the city center, it has the historic Upper Town. ETNOsphere's use of **Hrvatska kuća** (a museum space) is a potential USP (Unique Selling Proposition) that beats a generic restaurant, provided the venue can handle the volume.

3. Pricing and Packaging Norms

Price positioning is currently the single biggest lever for commercial improvement. The research indicates that ETNOsphere is likely leaving significant revenue on the table by underpricing its offering relative to the "experience economy" norms.

3.1 Current Market Pricing Architecture

The current pricing landscape in Zagreb is fragmented:

- **Hearts of Zagreb:** Offers a low entry point. Shows are ~€30, and Show + Dinner is estimated at ~€40. The combined Workshop + Show is ~€60.¹⁶
- **Standard Dining:** A three-course meal for two in a mid-range Zagreb restaurant costs between €35 and €60 (approx €20–€30 per person) excluding alcohol.²²
- **Fine Dining:** Tasting menus at places like Noel or Dubravkin Put start at €70+ per person,

without wine pairings.

3.2 The "All-Inclusive" Psychological Trigger

The benchmark analysis of Prague's Folklore Garden reveals a critical insight: **The power of "Unlimited."** The Prague price point of €54–€65 is accepted because it includes "unlimited beer, wine, and soft drinks".¹⁴

- **Psychology:** Tourists fear "tourist trap" drink prices. They worry that a €40 dinner will turn into an €80 bill after three glasses of wine. By offering an all-inclusive package, the operator removes this anxiety.
- **Margin Reality:** The cost of goods sold (COGS) for local beer and house wine in Croatia is relatively low. The perceived value of "unlimited" far exceeds the actual consumption of the average guest (who typically consumes 2-3 drinks).

3.3 Recommended Pricing Strategy

ETNOsphere should abandon the "low cost" position and move to a tiered "Value-Added" structure. This allows for segmentation between budget travelers and high-value tourists.

Table 1: Proposed B2C Pricing Structure

Package Tier	Inclusions	Proposed Price (pp)	Target Persona
Standard (The "Sampler")	1h Folklore Show + Welcome Rakija + Traditional Snack (e.g., Paprenjak or Strukli).	€35	Budget travelers, Students, "Early Dinner" eaters.
Premium (The "Gastro Feast")	3-Course Traditional Dinner + Show + 3 Drinks (Wine/Beer/Juice).	€65	The core product. Aligns with Expedia pricing (\$65) but adds drink limits to control margins.
VIP (The "Grandpa's Table")	Best Seating (Front Row) + 4-Course Feast + Unlimited Drinks + Photo with Dancers + Souvenir Heart.	€85	"Splurge" tourists, Celebrations, Corporate guests. Anchoring price to make Premium look reasonable.

Family Pass	2 Adults + 2 Kids (Special Kids Menu).	€180	Families seeking a "safe" night out. Discounts children to drive volume.
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3.4 B2B and Incentive Packaging

For the DMC market (Meetings, Incentives, Conferences), pricing must be opaque (Net Rates) and flexible.

- **Commission Structure:** Agencies like Intours and Ban Tours typically require a **20–25% commission** off the rack rate, or a net rate that allows them to mark up.
- **Incentive Modules:**
 - "**The Welcome to Croatia**": A 30-45 minute high-impact set designed for welcome receptions at hotels. Price: Flat fee €1,500 - €2,000 + Rider.
 - "**The Gala Buyout**": Exclusive use of the Hrvatska kuća venue. Price: Venue Hire + Per Head Catering Cost.
- **Customization:** DMCs value the ability to "brand" the event. ETNOsphere should offer white-label menus and branded Licitar hearts (e.g., with the corporate client's logo) as an upsell.

4. Best Distribution Channels for B2B and B2C

To achieve sustainable volume, ETNOsphere requires a balanced distribution mix. Relying solely on one channel creates vulnerability. The strategy must leverage the "Gatekeepers" of Zagreb tourism while simultaneously building a direct-to-consumer digital funnel.

4.1 B2B Channel Strategy: The DMC Ecosystem

Zagreb is the primary hub for MICE in Croatia. Agencies such as **Intours DMC**, **Ban Tours**, and **DT Croatia** control the itineraries of thousands of high-spending corporate delegates annually.²³ These buyers are sophisticated; they do not want "tourist traps." They want "authentic," "exclusive," and "reliable" experiences.

Strategy for Penetrating the DMC Market:

1. **Productization for RFPs:** DMCs work on Requests for Proposals. They need high-resolution images, exact capacity charts, and sample menus *immediately*. The new ETNOsphere website must have a password-protected "Partner Portal" containing these assets to reduce friction.
2. **The "Site Inspection" Offensive:** DMCs will never book a venue they haven't tasted. ETNOsphere must launch a quarterly "Industry Night"—a complimentary showcase event

where product managers from the top 10 DMCs are invited to experience the full VIP package.

3. **Flexibility as a USP:** Unlike fixed theaters, ETNOsphere should market its "Mobile Troupe" capability. If a DMC has a group of 500 at the Westin Hotel, ETNOsphere comes to them. This "plug-and-play" entertainment solution is highly valued for large congresses.

4.2 B2C Channel Strategy: The OTA Landscape

For the independent traveler (FIT), the booking window is short—often 24 to 48 hours before the event. Mobile visibility is paramount.

- **Viator / TripAdvisor:** This is the most critical channel. The current mixed reviews for "Hearts of Zagreb" are a liability.
 - *Action:* If rebranding, launch a new TripAdvisor listing for "ETNOsphere Folklore Dinner" to reset the rating. If retaining the old listing, a "Management Response" campaign is needed to address old grievances and signal a "New Concept."
 - *Optimization:* Titles must be descriptive. Instead of just "Folklore Show," use "Zagreb Traditional Dinner & Folklore Show with Wine Tasting."
- **GetYourGuide (GYG):** GYG is rapidly gaining market share in Europe. A dedicated "Instant Confirmation" listing is essential.
- **Airbnb Experiences:** This platform favors "intimate" and "host-led" activities. The "Hearts of Zagreb" workshop product is perfectly suited here. It should be kept separate from the "Dinner Show" listing to maintain the "local host" vibe that Airbnb users crave.²⁵

4.3 Strategic Partnerships: The Concierge Network

High-end hotels (Esplanade, Sheraton, Westin) have concierges who act as trusted advisors.

- **The Problem:** Concierges often recommend restaurants (Vinodol, Okrugljak) because they are "safe" bets.
- **The Fix:** ETNOsphere needs to prove it is "safe" (consistent quality). A "Concierge Referral Program" should be implemented, providing concierges with a simple QR code booking flyer that tracks commissions. Additionally, offering a "Concierge Night" (similar to the DMC night) is crucial to winning their trust.

5. Website Implications: Information Architecture and Conversion

The current digital presence¹⁸ is brochure-ware—descriptive, static, and lacking in urgency. The new website must pivot from "informational" to "transactional." It acts as the 24/7 salesperson for the brand.

5.1 Messaging Hierarchy and Brand Voice

The brand voice needs to shift from "Preservationist" (focused on saving history) to "Experiential" (focused on the guest's emotion).

- **Old Voice:** "We are dedicated to preserving heritage... from humble beginnings..."¹⁷ (Passive, inward-looking).
- **New Voice:** "Taste the History. Hear the Passion. Experience the Night Zagreb Comes Alive." (Active, guest-centric).

Core Value Proposition (Above the Fold):

"Zagreb's Premier Folklore & Gastronomy Experience. Live Music, Authentic Cuisine, Unforgettable Memories. **Book Your Table Tonight.**"

5.2 Information Architecture (IA)

The site structure must segment users immediately by intent (B2C vs. B2B) to prevent friction.

1. **Homepage:**
 - **Hero Section:** High-quality video background (not static images). Show, don't tell. Dancers twirling, wine being poured, guests laughing.
 - **Booking Widget:** Sticky bar at the bottom or top: -> ->.
 - **Social Proof:** "Rated #1 Cultural Experience on TripAdvisor" (or similar credible badge).
2. **The Experience (B2C Funnel):**
 - Detailed breakdown of the evening timeline.
 - **Menu Showcase:** High-resolution food photography is non-negotiable. The Peka, the Strukli, and the wine must look appetizing.
 - **Meet the Artists:** Brief profiles of the dancers/musicians to humanize the troupe and establish professional credibility.
3. **Groups & Corporate (B2B Funnel):**
 - A dedicated landing page for DMCs and Event Planners.
 - Focus on "Capacity," "Customization," and "Logistics."
 - Call to Action: "Request Proposal" (Lead Gen Form) rather than "Book Now."
4. **Venues:**
 - Showcase **Hrvatska kuća** with a 360-degree virtual tour. Highlight the historical ambiance (19th-century peasant house) as a USP.
5. **Workshops (The "Hearts" Product):**
 - Keep this as a sub-section for the daytime crowd (Licitar heart making).

5.3 The Conversion System

The website is not just a brochure; it is a machine for taking money.

- **Booking Engine Integration:** The site must integrate with a real-time reservation system

(e.g., Rezdy, Bokun, or a custom API). "Send an email to book" is a conversion killer in 2026.

- **Trust Signals:** Prominent display of "Free Cancellation up to 24h" policies. This matches the standard set by competitors like Folklore Garden Prague and reduces booking anxiety.
- **Mobile Optimization:** 70% of in-destination bookings happen on mobile. The checkout flow must be seamless on a smartphone—Apple Pay / Google Pay integration is highly recommended to reduce friction.
- **SEO Strategy:**
 - *Primary Keywords:* "Folklore dinner Zagreb," "Traditional Croatian food Zagreb," "Best things to do in Zagreb at night."
 - *Content Strategy:* A blog section addressing top-of-funnel queries like "What is a Licitar Heart?"²⁶ or "History of the Cravat" helps capture organic traffic and establishes authority.

6. Strategic Implementation Roadmap

Phase 1: Brand Consolidation & Definition (Months 1-2)

- **Decision:** Rebrand the evening show as "The ETNOsphere Gala" (or similar premium name). Retain "Hearts of Zagreb" strictly for the daytime workshop product to ring-fence the mixed reviews and distinct audience.
- **Asset Creation:** Commission professional photography and video. The current visual assets are likely insufficient for a premium repositioning.

Phase 2: Product & Pricing Restructure (Months 2-3)

- **Menu Engineering:** Finalize the 3-course and 4-course menus. Ensure "Peka" and "Strukli" are prominent.
- **Pricing:** Implement the €35 / €65 / €85 tier structure.
- **Partnerships:** Sign agreements with transfer providers (if offering VIP transfer) and secure alcohol suppliers for the "unlimited" package.

Phase 3: Digital Launch (Month 4)

- **Website Go-Live:** Launch the new conversion-focused site.
- **OTA Overhaul:** Update all third-party listings with new copy, images, and pricing.
- **SEO Campaign:** Begin publishing content to index for key terms before the summer season.

Phase 4: B2B Sales Blitz (Months 5-6)

- **DMC Roadshow:** Host the "Industry Night" for Zagreb's top agencies.

- **Concierge Outreach:** Distribute the new QR-code booking materials to top hotels.

By executing this roadmap, ETNOsphere will transition from a fragmented service provider into the definitive cultural attraction of Zagreb, capturing the value of the city's tourism renaissance and securing its commercial future.

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