

SPORTS TOURISM OFFER IN CROATIA

*Mato Bartoluci*¹, *Sanela Škorić*² & *Zrinka Starešinić*³

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Summary

Both tourism and sport are massive socio-economic phenomena of modern society. In 2014, UNWTO registered over 1 billion international tourist arrivals in the world – a number that is still on the rise. At the same time, there are, according to some assessments, over 600 million active participants in sport. A significant share of sports activities is conducted through tourism. Therefore, sport and tourism are interrelated phenomena that generate numerous functions and significant economic effects.

The basic aim of this paper is to analyse the development of sports tourism in Croatia. For that purpose, both primary and secondary data are used. Desk research of Internet sites of town tourist boards was conducted to analyse the sports tourism offer. In addition, a questionnaire was developed for experts in the area of (sports) tourism development. The basic hypothesis of this paper is that sports tourism in Croatia should be developed as an integral tourist product.

The study has shown that the five most frequently mentioned sports activities are cycling, walking, tennis, fishing and horseback riding. However, the Internet site analysis showed a somewhat different situation, and found cycling, fishing, hunting, mountaineering and tennis to be the most frequently mentioned sporting activities. The vast majority of interviewed destinations, i.e. 84% of them, incorporated sport into the tourism offer when promoting their destination, but only as a supplement to their main attraction. If we add to this the fact that the motive of sport ranked fourth on the scale of motives for visiting a par-

¹ Mato Bartoluci, Ph. D., Full Professor with Tenure, University of Zagreb, Faculty of Economics and Business, Croatia, E-mail: mato.bartoluci@efzg.hr

² Sanela Škorić, Ph. D., Assistant Professor, University of Zagreb, Faculty of Kinesiology, Croatia, E-mail: sanela.skoric@kif.hr

³ Zrinka Starešinić, Spec. M. Sc. Econ., Josip Juraj Strossmayer University of Osijek, Faculty of Economics, Croatia, E-mail: zrstareshinic@gmail.com

ticular destination and was chosen by 38% of interviewed destinations, it seems clear that the sport offer is found to be an integral part of the tourism offer in general.

Key words: *tourism, sports tourism, integral tourism product.*

1. INTRODUCTION

Since 1950s, when the official statistical records on tourism were kept for the first time, until 2014 “despite occasional shocks, tourism has shown virtually uninterrupted growth” (UNWTO, 2015:2). The number of international tourist arrivals increased from 25 million in 1950 to 1.133 million in 2014, and it is expected that it will reach 1.8 billion by 2030. What is the significance of sport and sports tourism in this? We cannot answer this question easily, since no official records monitoring data on sports tourism exist. Nevertheless, a number of authors have pointed to the importance of this type of tourism, and stated that people have been traveling for sport-related reasons since ancient time. Apart from travel to follow sports events, travel to participate in a certain sporting activity (intentionally or as a secondary activity) becomes even more important. In some of those activities tourists can participate only seasonally (like skiing⁴ in winter), in particular environments (like rafting), or without any limitations if necessary infrastructure exists (like tennis). In other words, development of tourism in certain areas depends on these activities, whereas in other areas it usually represents an additional offer and is not a primary motive for travelling to a particular destination.

Croatia’s economy depends to a large extent on tourism, developed mostly in the coastal part of Croatia and based on the “sun and sea” type of product. Consequently, Croatian tourism faces the problem of seasonality, with majority of tourism flows generated in the coastal areas and during summer months. A strategic goal of almost every tourism plan and strategy for years has been solving this problem. Development of a more diversified offer is seen as a solution. Various analyses have shown that the development of sports tourism can be a part of this solution, since it can prolong the summer season. The starting premise of this paper is that sports tourism is an integral part of the tourism offer, and that it is used as a secondary attraction. This paper deals mostly with the supply and the aims of determining which type of sports activities is developed in different parts of Croatia, with some reference to demand. In addition, based on research corroborating the importance of sport in promotion of tourism and increasing importance of internet for tourists when searching for information about a destination, the aim was to research into whether sport is used as a promotional tool by tourism destinations, i.e. tourist boards as organisations in charge of tourism promotion.

⁴ Although there are skiing areas that offer this type of activity during summer months as well, it is mostly associated with the winter season.

2. THE TERM SPORTS TOURISM AND ITS DEVELOPMENT IN CROATIA

When defining the term sports tourism, a situation that could be described as “the number of definitions equals the number of authors” is present. Various authors researching into the field of sports or physical recreation-related tourism, approach the problem in their own way and therefore define it differently (for example, see Standeven & De Knop, 1999; Turco, Riley & Swart, 2002; Studzieniecki, 2003; Gibson, 2003; Weed & Bull, 2004). This paper follows what can be referred to as the motivational approach to defining sports tourism. Namely, sports tourism is a type of special interest tourism and the basis for differentiating among various types of special interest tourism is “the motivation for travel as well as the activities during the stay of the tourists in a certain tourism destination” (Bartoluci, 1985:290). “The emphasis of such market segmentation is on defining primary tourist motives that drive people to visit particularly attractive places, socialise with tourists of a similar life style and satisfy their specific tourist needs” (Kesar, 2007:290). In that sense Bartoluci states that “*tourism in which sport is the main motive for travelling and for staying in a certain destination is termed as SPORTS TOURISM*” (Bartoluci, 2004:20). According to the same author, sports tourism comprises several different types, namely: competitive sport tourism, and winter and summer physical recreation-related tourism.

Competitive sports tourism encompasses “all journeys that are initiated by the motive of participating in certain sporting events, from national to international competitions” (Bartoluci, 2004:20). The main motive for travel is a certain sporting event, regardless of whether the tourists are its active (athletes) or passive participants (spectators). However, in physical recreation-related tourism the main motive for travel is the (active) participation of tourists in certain physical recreation-related activities. The winter physical recreation-related tourism usually refers to mountain winter resorts, but also spas, coastal destinations, etc., and summer physical recreation-related tourism to coastal destinations, mountains, rivers, lakes, etc. Tourists can participate in various physical recreation-related activities during these seasons. For example, during winter tourists usually practise activities like skiing, cross-country skiing, skating, team sports on snow and ice, etc., and during summer walking, running, mountaineering, water sports, team sports, tennis, horseback riding, etc. (Bartoluci, 2004:22).

Although a distinction is made between various types of sports tourism, it is necessary to emphasise that this paper deals only with the development of physical recreation-related tourism and not competitive sports tourism.

When developing (sports) tourism in a certain area, one has to be familiar with its resources. “Overall tourism offer has to be based on autochthonous characteristics and capacities of resources (space) in order to achieve better economic and non-economic effects.” (Čavlek et al., 2011:129) In other words, the spatial element and natural resources play an irreplaceable role in deciding which sports to develop, since “general sporting activities, which are integrated into leisure time tourism activities, depend greatly on the geographical and seasonal conditions at a destination” (Keller, 2001:12). Nevertheless, one should differentiate between sports that “tend to be centrally located

and those that take place in peripheral regions” (Hinch and Higham, 2004:80). Sports tourism in central locations mostly refers to, on the one hand, facilities used for sports competitions and situated in urban areas, and on the other to sports centres, while sports tourism in peripheral locations is generally based upon the presence of natural resources, which may be modified or complemented by constructed facilities. It encompasses activities of the so called active sports tourists.

In their research on the local productive system of sports tourism, by using a parallel with the industrial sector for which empirical studies were performed to estimate the geographical concentration of companies and organisations, Hautbois et al. (2003) provided a typology of spaces in which outdoor activities are over-concentrated. They found that some of the activities depend on natural characteristics, whereas others are scarce and do not appear to depend on any natural specificity. For example, sailing cars require large beaches and compact sand and this activity is practised in the western part of France. Activities specific for mountain areas are climbing, parachuting, hang-gliding, and canoeing/kayaking. Potholing, i.e. speleology requires limestone massifs, whereas sailing develops only in coastal areas. On the other hand, hiking does not need any natural specificity (except a natural environment), and horse-riding develops in spaces in which a network of paths is to be found.

There have been some attempts to develop certain sports programmes in the Croatian tourism offer in 1955 (Badija) and 1957 (Poreč), but its larger implementation in tourism started about a decade later. For the development of physical recreation in Croatian tourism, special significance is awarded to the Department of Physical Recreation at the *Physical Education Polytechnics* in Zagreb founded in 1959 (nowadays the Faculty of Kinesiology). Among the first experts to note the need for integrating physical recreation contents in the tourist offer in order to achieve high quality and eventful tourist stays, was the founder of the Department, Mirko Relac (see Relac and associates, 1968; Relac and associates, 1969; Relac, 1972; Relac, 1979; Relac et al., 1984; Relac, Bartoluci, 1987). The first project was realised in 1966 in Baška on the island of Krk and in Crikvenica. This is the time when the first facilities for physical recreation activities in tourism were built. These were a miniature golf course, one table for table tennis, darts and swing bowls. Numerous projects followed such as those of the construction of two experimental physical recreation centres in tourism (Pula, Makarska), followed by the opening of nine more centres for physical recreation activities along the Croatian coastline (Pula, Rovinj, Umag, Omiš, Bol on the island of Brač, Lopar and Rab). Monitoring of the work of these centres continued, and research generated positive results in the “interest of the guests towards programmes of active rest” (Relac, Bartoluci, 1987:V). One year later, research studies in Šibenik and Poreč were conducted, and from 1970 until 1990, the Department for Physical Recreation created more than 50 developmental tourism studies along the Croatian coastline. The physical recreation offer was introduced in numerous treatment centres because they started to direct their activities towards prevention, and not only rehabilitation.

During that period and onwards many authors and researchers contributed to the theory of development of sport and physical recreation in tourism with regard to

changes in the tourist demand market. In 1972, in the Croatian town of Poreč an international symposium “Economic values of physical recreation in tourism” was held. A number of domestic and foreign experts participated. From the very title of the conference one can see that the main area of interest were the economic effects of physical recreation in tourism, which partially determined the course of later research studies on the topic of sport and physical recreation in Croatian tourism. Since then, numerous books (Relac, Bartoluci, 1987; Bartoluci, Čavlek, (eds.), 1998; Bartoluci and associates, 2004; Bartoluci, Čavlek, and associates, 2007), papers and research studies have been published.

This paper attempts to build on that body of literature from the point of view of supply by researching into the existing sports offer, its use and significance for tourism development and promotion.

3. CROATIAN TOURISM

The Republic of Croatia occupies a geographic area of 56,538 km² of land surface and 31,479 km² of sea surface and has a population of 4.28 million (Ministry of Tourism, 2015:5) or 76 inhabitants per km². It can be regionally divided into three tourist macro regions (Bilen & Bučar, 2004, quoted in Bilen & Bučar, 2007:320-324) characterised by different natural resources:

1. The Adriatic tourism region (Mediterranean) is the area of islands, coastline and sub-Mediterranean hinterland. It covers 31.6% of the total Croatian area and is inhabited by slightly more than 30% of the total Croatian population. Its natural resources offer favourable conditions for water activities such as swimming, water skiing, windsurfing, diving, sailing, etc. However, there are also favourable conditions for walking, cycling, horseback riding, beach volleyball, tennis, golf, and in the hinterland mountain hiking, paragliding, free climbing, rafting and biking.
2. The mountain tourism region covers about 14% of the total Croatian area but is inhabited by a mere 3% of the Croatian population. It provides good opportunities for the development of transit tourism. The main natural and tourist resources of this region are moderately high mountains, rivers, natural and artificial lakes, karst fields, caves, rich flora and fauna. It provides opportunities for fishing, hunting, health tourism, winter sports, hiking, walking, swimming in the rivers or lakes, rafting, canoeing, and speleology.
3. The Pannonian tourism region is the largest area that covers more than 50% of the Croatian area and is inhabited by more than 66% of the Croatian population. It is mostly flat with scarce mountain ranges, many rivers and brooks, smaller lakes, thermal spas and significant areas covered in oak forests. The existing tourist and natural resources provide favourable conditions for sports and recreation in particular fishing, canoeing and rafting, as well as football, volleyball, handball, rugby, golf, hiking, horseback riding or simply running.

Table 1: Basic data on tourism development since 1991⁵

	1991	1995	2000	2005	2010*	2014
Number of beds	632,050	249,905	282,921	909,210	909,951	977,414
Number of tourist arrivals (in 000)	2,297	2,610	7,137	9,995	10,604	13,128
Number of tourist overnights (in 000)	10,471	13,151	39,183	51,421	56,416	66,484

**Due to the implementation of the new legislation in monitoring of tourists, since 2010 nautical ports are no longer included in the category Types of accommodation establishments. Therefore, the data from 2010 onwards are not comparable to those from previous years*

Source: Republic of Croatia-Central Bureau of Statistics (2015; 2003)

As can be seen from Table 1, Croatia has experienced a constant growth in the number of tourist arrivals as well as tourist overnight stays throughout the observed period of 23 years. In 2014, Croatia generated more than 13 million arrivals and more than 66 million overnight stays. The majority of this tourist traffic is realized in the Adriatic tourist region, i.e. during summer months. Almost 50% of all tourist arrivals, as well as around 60% of all overnight stays were generated in just two summer months, July and August. This indicates the presence of the often-stressed “problem” of seasonality, a topic researched by numerous authors (see Čavlek et al., 2010, Kožić, 2013). The problem of seasonality is usually caused by natural (climate conditions) and institutional factors (distribution of holidays throughout the year, habits of going on holiday in a certain time period, school vacations, etc.) (quoted in Kožić, 2013:473). Even the Government of the Republic of Croatia finds this to be one of the main problems and emphasises that “Croatia is a typical example of a mature tourist destination dominated by one tourist product (“sun and sea”) and high seasonality typical for countries situated by warm seas such as the Mediterranean and the Adriatic” (2013:19). Indeed, the level of seasonality calculated for European countries in the Mediterranean was the highest for Croatia (0.59) followed by Montenegro (0.55), Greece (0.49), Italy (0.33), etc. (Kožić, 2013:476). The reasons are found in insufficiently developed other types of tourism (apart from “sun and sea”). However, “despite numerous initiatives and priorities to decrease the seasonality and develop different products, the share of sun and sea in the total Croatian tourist product has been above 85% for years” (Government of the Republic of Croatia, 2013:8). The development of various types of special interest tourism (sports tourism as well) is seen as a possible solution to this problem. Research has shown that sports tourism contributes to overall attractiveness, quality and competitiveness of tourism, and generates additional value in tourism, manifested through direct and indirect economic effects. Direct economic effects are “realised in tourism or sports businesses on the basis of selling the sports physical recreation-related services”, whereas indirect effects are “manifested through several factors, namely:

⁵ The year 1991 has been taken as the first year since this is the year in which Croatia gained its independence.

- motivation for selecting a particular tourism destination,
- prolonging the tourist season,
- overcoming the seasonal character of tourism,
- increasing extra spending,
- improvement of the diversity and of the quality of a tourism offer, etc.“ (Bartoluci, 2007:331).

Research conducted by Škorić (2008:82) has shown that coastal destinations can benefit from sports tourism, since it “can have an impact on extending the tourist season. As a confirmation, the motive of sports and physical recreation-related facilities was more present in April than in August. Therefore, it can be argued that *this motive of travel is more important for shoulder than for the main tourist season.*”

Table 2: Sport and recreation activities in which the tourists most frequently participated in 2014

Rank	Activity	Share
1	Swimming	98.9
4	Walking	78.3
10	Underwater diving	37.0
11	Health, recreational and wellness programmes	36.1
13	Water sports	33.9
14	Biking	33.2
18	Fishing	21.4
19	Tennis	21.1
22	Adventure sports	14.3
23	Mountaineering	12.6
24	Golf	8.0
25	Horseback riding	6.8

Source: Institute for Tourism, 2015

Due to the importance of summer season and coastal destinations for Croatian tourism, it is not surprising that the only longitudinal research on the various characteristics of tourists, entitled “Attitudes and expenditures of tourists in Croatia – TOMAS”, deals only with coastal destinations and is conducted during summer months. In the summer of 2014, this study was conducted for the ninth time. According to TOMAS Summer 2014 Survey (Institute for Tourism, 2015), the primary motive for visiting Croatia was passive rest and relaxation (75.1%), followed by fun (43.0%), new experiences (29.9%), enjoying food and drinks, gastronomy (26.3%), natural attractions (20.2%), etc. “Although the sequence of the motives for travelling to coastal destinations remained almost unchanged, there are changes regarding importance of the motives.” (Institute for Tourism, 2015:38) Since 1994 there has been an increase in the importance of sec-

ondary motives such as fun (from 18% in 1994 to 43% in 2014), new experiences (from 11% in 1994 to 30% in 2014), and gastronomy (from 19% in 2004 to 26% in 2014). The motive of sport and recreation ranked sixth with a 6.8% share. However, some other motives were also connected with sport, such as the motive of underwater diving (3.2%), wellness (1.4%) and maybe even health (4.1%). The most important source of information was a previous visit (35%), the Internet (30%) and recommendations of friends and relatives (20%). Tourists arrived mostly by car (79%), followed by airplane (11%). Sport and recreation activities which the tourists most frequently participated in during their visit can be seen in Table 2.

It was noticed that the tourists increased their participation in: underwater diving, health-recreational and wellness programmes, as well as biking and walking, while other sports activities sustained a decrease in participation as opposed to 2010 (Institute for Tourism, 2015:47).

4. METHODOLOGY AND RESULTS

The basic aim of this paper is to research into the current sports tourism offer, i.e. what it lacks and how important this type of offer is for the development of tourism in Croatia. For that purpose the following has been done:

- a desk research of the Internet sites of town tourist boards (the objective was to analyse how many towns use sports (or recreation), and which, when presenting their tourism offer);
- an online questionnaire was developed and representatives of town tourist boards in Croatia were asked to complete it.

Tourist boards and their representative offices were chosen primarily because of their importance for tourism development. According to the *Act on tourist boards and the promotion of Croatian tourism* (NN, 152/08), they manage the development of tourism in an area they are established for. The common goals of tourist boards are to:

1. Promote and initiate development and improvement of the existing tourism product, initiate the development of new tourism products for the area for which they have been established through destination management at the level for which they have been established.
2. Promote the tourism product of the area for which they have been established.
3. Raise the awareness of the importance and economic, social and other impacts of tourism, as well as the need and importance to preserve and improve all elements of a tourist product of an area, and in particular environmental protection and the protection of natural and cultural heritage in accordance with sustainable development.

The system of tourist boards in Croatia exists at three levels (see Čavlek et al., 2011:101): national (Croatian National Tourist Board), regional (21 counties and some

regions, e.g. Istria) and local (428 municipalities and 128 towns) (Ministry of Public Administration, 2016). Of special interest for this paper are local tourist boards, since they are “closest to the guests and tourist offer providers at the level of destination (from both private and public sector).” (Čavlek et al., 2011:103) In addition, among many tasks awarded to them by law are the following (NN, 152/08):

- regularly, and at least every four months, collect and update information about the tourist offer, accommodation and hotel and catering facilities (cultural, sporting and other events), working hours of medical clinics, banks, post offices, shops and similar, and other information necessary for the stay and travel of tourists;
- perform information tasks concerning the tourism offer;
- promote and organise cultural, entertaining, artistic, sporting and other events contributing to a richer tourism offer.

Therefore, it is clear that tourist boards represent “the starting point in the complex process of managing the tourism system” (Dulčić, 2001:139), and their employees should be most familiar with tourist offer of their destination and are therefore regarded as experts.

Due to issues of the overlapping administrative boundaries of municipalities and towns, for the purpose of this study, tourist boards in Croatian towns were chosen as the research population. The devised questionnaire consisted of 17 questions (4 open ended and 13 closed). Twelve questions related to sports tourism offer and the additional 5 were general questions (age, gender, occupational position, destination they are in charge of, and period of employment in the tourist board). The population consisted of 128 towns and their tourist boards. However, 124 tourist boards were contacted, since 4 towns could not be reached and were therefore excluded from the research. The response rate was 30% (37 answers were received), 18 from towns in the continental part of Croatia, and 19 from the coastal part of Croatia. The final sample was comprised of towns from almost all counties of Croatia (no answer was received from only one county, which is in the continental part of Croatia). In addition, “over the past ten years, the Internet has achieved huge market penetration, with more than a billion users worldwide. Travel and tourism are key areas for the application of the Internet in all major markets. The major growth markets for international travel will consist predominantly of Internet users. The Internet is the primary medium for accessing travel information for planning in all major markets. This requires a complete transformation in the way in which tourism destinations and suppliers do their business” (WTO, 2007:125). Therefore, “the Internet seems to be an indispensable tool of tourism promotion”, and although “new information technologies (IT) are reluctantly adopted by small and medium tourism enterprises, especially from hospitality sector, [the] public sector as a stakeholder increasingly appreciates the benefits of IT in tourism sector” (Pawlicz, 2009:67-69). The importance of the Internet was emphasised by the Government of the Republic of Croatia (2013:22) which finds the passive relationship towards “electronic marketing and web social services” one of the limitations for further development of Croatian tourism. It therefore emphasised the need to “turn to online communication” (Ministry of Tourism, 2015a).

In this process, “due to a growing acknowledgment of the importance of sport as a motive for tourism and a vehicle for tourism promotion” (Bull, 2006:259), sport offer seems to be gaining importance for tourism promotion and development. In his *Opinion Paper* (2004:291) De Knop notes that “the authorities (e.g. communities, provinces and the country itself) are also organising sport promotional campaigns during the holiday periods or are using sport to promote tourism to the country (e.g. bicycle paths, sport promotion at the beach during summer times, “With Bloso in the breakers”, i.e. a water sport promotional campaign for people on holiday at the sea shore, guided walking tours in the Ardennes, etc.).” “Tourism needs sport for the development and marketing of products. And sport would have a hard time without tourism, for it is tourism that helps to develop entirely new types of sport, and a great many tourists remain devoted to existing sports disciplines.” (Keller, 2001: 16)

As mentioned previously, due to geographical diversity of Croatia and consequently different natural characteristics, prerequisites for conducting various sports can vary significantly. Therefore, an analysis was done by distinguishing between the continental and the coastal part of Croatia. Croatia consists of 21 counties (20 counties plus the capital of Croatia). For the purpose of this research, the coastal part of Croatia represents towns in the counties that include the coastline (7 counties, and the total of 60 towns), and the rest (13 counties plus the capital of Croatia, and the total of 68 towns) represent the continental part of Croatia.

Table 3: The most frequently mentioned sports activities on tourist boards' Internet sites

Sports activity	N	Coastal	Continental
Cycling	58	33	25
Fishing	46	19	27
Walking	32	20	12
Hunting	32	12	20
Mountaineering	31	16	15
Horseback riding	27	13	14
Underwater diving	24	22	2
Tennis	23	12	11
Exercising in halls for various sports such as football, volleyball, handball, etc.	19	5	14
Kayaking and canoeing	17	14	3
Sailing	16	16	0
Football	12	6	6
Paintball	9	4	5
Training for fitness	9	5	4
Motor sports	8	3	5
Climbing	8	6	2
Swimming	8	2	6

Let us first look at the analysis of the Internet sites of tourist boards. We found that 28 of them, i.e. 22%⁶ do not use sport when presenting their destination via the Internet. However, it has to be said that 10 of them do not have their own Internet pages⁷, 6 have only a Facebook connection, and the remainder of 12 have their own publicly available sites. A list of about 50 activities was created, and the most important (i.e. the most frequently mentioned) sports activities can be seen in Table 3.

As expected, some sports activities are more present in the continental rather than in the coastal destinations (fishing, hunting, exercising in halls for various sports and swimming), and vice versa (walking, underwater diving, kayaking and canoeing, sailing, climbing).

In the second part of the research, an online questionnaire was created and 124⁸ tourist boards were contacted. The response rate was 30% (37 answers were received), 18 from towns in the continental part of Croatia, and 19 from the coastal part of Croatia. Seventeen directors, 16 employees, and 4 others (mostly heads of information offices) filled in the questionnaire.

A list of 8 travelling motives (plus motive "Other") was produced and the respondents could choose as many as they wanted. On average, they chose 3 motives, most important being rest and relaxation as indicated by 23 towns (see Table 4). As can be seen, this motive is more important for the coast rather than for the continent, where the most important motive is that of culture. Sports and recreation ranked fourth and were chosen by 14 (38%) destinations equally spread between the continental and the coastal part of Croatia.

Table 4: Motives for travel

Motives	N	Continental part	Coastal part
Rest and relaxation	23	8	15
Beauty of nature	22	10	12
Culture	21	11	10
Sport and recreation	14	7	7
Fun and new experiences	9	3	6
Proximity of destination	7	4	3
Health reasons	5	3	2
Business	5	3	2
Other	5	3	2

Let us look at sports activities that the destinations include into the offer (see Table 5). In general, the majority of destinations offer cycling, walking, tennis, fishing

⁶ Eighteen continental (26% of all continental destinations), and 10 coastal (17% of all coastal destinations).

⁷ Five present themselves through Internet sites of a larger destination, but do not have their own Internet sites and were therefore excluded from this research.

⁸ Officially, there are 128 towns in the Republic of Croatia (Ministry of Public Administration, 2016). However, 4 towns could not be contacted and were therefore excluded from the research.

(and underwater fishing), horseback riding, mountaineering or hiking. As expected, sports activities present in the continental part of Croatia differed to some extent from sports activities from the coastal Croatia. First, sports offer in the coastal part seemed to be more diversified since coastal destinations offered on average 14 different sports activities, and continental destinations offered 9. Furthermore, 14 sports activities were offered by more than 50% of coastal destinations (cycling, walking, tennis, fishing and underwater fishing, horseback riding, mountaineering, swimming, fitness training, wellness-related activities, trekking, kayaking, underwater diving, bocce pitching and paragliding) and in continental destinations only 5 sports activities were offered by more than 50% of destinations (cycling, walking, tennis, horseback riding and hunting).

Table 5: Sports programmes (activities)

Sport activities	N	Continental Croatia	Coastal Croatia	Internet sites
Cycling	30	15	15	21
Walking	29	13	16	9
Tennis	27	13	14	10
Fishing and underwater fishing	22	8	14	17
Horseback riding	21	9	12	9
Mountaineering	19	7	12	13
Swimming	18	7	11	4 (+5*)
Training for fitness	18	6	12	3
Wellness-related activities	18	8	10	3
Football	16	8	8	5
Trekking	16	5	11	-
Hunting	16	9	7	14
Beach volleyball	15	6	9	-
Kayaking	15	4	11	7
Underwater diving	13	1	12	7
Basketball	12	6	6	4
Bocce pitching	12	2	10	1
Paragliding	12	2	10	2
Aerobics	12	5	7	-
Table tennis	11	5	6	-
Handball	10	5	5	2
Free climbing	10	1	9	4
Volleyball	9	5	4	1
Rowing	9	5	4	-
Wind surfing	8	1	7	-
Miniature golf	8	6	2	1
Sailing	7	0	7	6
Water skiing	6	1	5	-
Speleology	5	1	4	-
Rafting	4	1	3	1
Other	2	0	2	

*5 mention swimming pools, i.e. implicitly swimming

Regardless of natural characteristics, it is interesting to see that the top three sports activities in both types of destinations were cycling, walking and tennis. As mentioned previously, these activities do not depend on natural characteristics, so it comes as no surprise that they are present in all destinations. However, as expected, the continental destinations put a bit more emphasis on hunting (50%) than the coastal ones (37%). At the same time, more than 60% of the coastal destinations offered horseback riding, mountaineering, fitness training and underwater diving. The biggest difference can be seen in the activity of underwater diving, which was present in 12 coastal and, naturally, only 1 continental destination.

However, if we compare the responses from the questionnaire and what was found on the Internet sites, significant differences exist (see Table 5). For example, as many as 29 respondents mentioned walking, whereas only 9 destinations promoted it on their Internet sites. Clearly, destinations do not find this sports offer to be their main tourist attraction, so they do not mention it when promoting their tourist offer. This was confirmed by the research, since the majority of destinations, i.e. 84%, replied that they use sports when promoting their destination, but only as a supplement to their main attraction. Only one destination did not include sports in the promotion of its tourism and 4 (3 continental) used it as their primary attraction.

The existing sports offer is mostly intended for recreational users (81% of all destinations). However, 6 destinations (all continental) are oriented towards athletes.

Around one quarter of destinations find that nothing is missing, while the rest identified 30 possible shortcomings in their offer. The most important ones are more organised bike trails (16% of all destinations – 4 continental and 2 coastal), indoor sports halls (16% - equally distributed between continental and coastal destinations), swimming pools (11% - mostly coastal destinations), and Nordic walking groups as well as mountaineering and walking groups (11% - mostly continental destinations).

When asked to emphasise which of the sports they found most important for their destination, a list of 32 activities was created (it was an open-ended question). The majority of destinations chose cycling (49% of all destinations) and walking (27% of all destinations). However, cycling was a bit more important for coastal (63%) than continental (37%) destinations, while walking was equally important for both (five coastal and five continental destinations).

Respondents were asked to grade the diversity, quality as well as the importance of the sports offer for their destination on a scale from 1 (the lowest grade) to 5 (the highest grade). It seems that when diversity and quality of sports offer is concerned, the coastal destinations are slightly more satisfied with their sports offer than the continental ones (see Table 6). We find this not surprising since it has already been mentioned that the diversity of sports programmes is larger in coastal destinations. Although our results cannot be fully compared with the results of TOMAS Summer 2014 due to different methodology⁹, it should be said that in this study the tourists in coastal destinations

⁹ A scale of 1 (very poor) to 7 (excellent) was used, and the rank was created based on the sum of percentage of grades 6 and 7 (Institute for Tourism, 2015:50).

expressed a medium level of satisfaction with the diversity of sports offer, and it was ranked 23rd (Institute for Tourism, 2015:50). At the same time, continental destinations found sports more important for their tourism.

Table 6: Grading of diversity, quality and importance of sports offer

	Average grade	Continental Croatia	Coastal Croatia
Diversity of sports facilities and programmes	3.24	3	3.47
Quality of sports facilities and programmes	3.43	3.28	3.58
Importance of sports facilities and programmes for tourism	4.05	4.11	4

5. CONCLUSION

Sport has had an important place in Croatian tourism since 1970s when the first research pointed to its economic importance in the development of tourist centres of the past. Due to its evidenced economic importance, Croatia witnessed a rather intensive development of sports offer in tourist centres, especially along the seaside, leading to the development of sports tourism.

Empirical study showed that despite geographical differences, five most frequently mentioned sports activities are cycling, walking, tennis, fishing and horse-back riding. At the same time, the Internet sites analysis showed a somewhat different situation, and found cycling, fishing, hunting, mountaineering and tennis as the most frequently mentioned ones. When asked to identify the most important sports activity for their destination, the majority of respondents chose cycling (49%) and walking (27%). However, cycling is a bit more important for the coastal (63%) than the continental (27%) destinations, whereas walking was equally important for both (five coastal and five continental destinations). At the same time, more organised bike trails (16%) are lacking. The vast majority of interviewed destinations, i.e. 84% of them, use their sports offer in promoting their destination, but only as a supplement to their main attraction. If we add to this the fact that the motive of sport ranked fourth and was chosen by 38% of destinations, as well as the differences in the frequency of mentioning various sports activities on the Internet and by the respondents, it seems clear that the sports offer is considered to be an integral part of the tourism offer in general. Nevertheless, a recommendation towards a more cooperative relationship between sport and tourism should be developed, due to the importance of sport for prolonging the tourist season.

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PONUDA SPORTSKOG TURIZMA U HRVATSKOJ

*Mato Bartoluci*¹⁰, *Sanela Škorić*¹¹ & *Zrinka Starešinić*¹²

Sažetak

Turizam i sport dvije su masovne društveno-ekonomske pojave modernog društva. Prema podacima UNWTO-a, u 2014. godini u svijetu je registrirano preko 1 milijarde međunarodnih turističkih dolazaka – brojka koja je još uvijek u porastu. U isto vrijeme, prema nekim procjenama, sport obuhvaća preko 600 milijuna aktivnih sudionika. Znaatan dio ovih sportskih aktivnosti provodi se u okviru turizma. Moguće je stoga reći kako su sport i turizam dvije međusobno povezane aktivnosti koje generiraju brojne funkcije i znatne ekonomske učinke.

Osnovni je cilj ovog rada analizirati razvoj sportskog turizma u Hrvatskoj. U tu su svrhu korišteni primarni i sekundarni izvori podataka. Provedeno je desk istraživanje (pretraživane su Internet stranice gradskih turističkih zajednica kako bi se analizirala sportska ponuda), te je razvijen upitnik namijenjen stručnjacima u području razvoja (sportskog) turizma. Osnovna je hipoteza rada kako bi se sportski turizam u Hrvatskoj trebao razvijati kao integralni turistički proizvod.

Rezultati istraživanja provedenog anketnim upitnikom pokazali su kako je pet najčešće spominjanih sportskih aktivnosti biciklizam, šetnje, tenis, ribolov i jahanje. Međutim, analiza Internet stranica pokazala je nešto drugačiju situaciju. U ovom su slučaju najčešće spominjane sportske aktivnosti su biciklizam, ribolov, lov, planinarenje i tenis. Većina ispitanih destinacija, njih 84%, koristi sportsku ponudu prilikom promocije svoje destinacije, no čini to kao dopunu glavnoj atrakciji. Ukoliko navedenom dodamo činjenicu kako se motiv sporta nalazi na četvrtom mjestu i odabralo ga je 38% destinacija, čini se jasnim kako se sportska ponuda razvija isključivo kao integralni dio turističke ponude.

Ključne riječi: turizam, sportska ponuda, integralni turistički proizvod.

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¹⁰ Dr. sc. Mato Bartoluci, redoviti profesor u trajnom zvanju, Sveučilište u Zagrebu, Ekonomski fakultet, Hrvatska, E-mail: mato.bartoluci@efzg.hr

¹¹ Dr.sc.Sanela Škorić, docent, Sveučilište u Zagrebu, Kineziološki fakultet, Hrvatska, E-mail: sanela.skoric@kif.hr

¹² Zrinka Starešinić, univ. spec. oec., Sveučilište Josipa Jurja Strossmayera u Osijeku, Ekonomski fakultet, Hrvatska, E-mail: zrstareshinic@gmail.com