

RECENZIJE / REZENSION / REVIEWS

Grupa autora: "OCJENA TURISTIČKE PONUDE KVARNERA"

(glavni istraživač: prof. dr. sc. Branko Blažević)

a kao rezultata

PRVE FAZE ISTRAŽIVANJA NA PROJEKTU BR. 011603:

"TURISTIČKA REGIONALIZACIJA U GLOBALNIM PROCESIMA"

publicirano u tematskom broju časopisa

"Tourism and Hospitality Management"

Vol. 10. No. 1, march, 2004

EXPERT OPINION

on the first part of the project No. 011603

„Regionalisation in Tourism under the Aspects of Globalisation“ [Turistička regionalizacija u globalnim procesima]

elaborated by

the Faculty of Tourism and Hospitality
Management Opatija
on behalf of the Ministry of Science,
Education and Sports

Main researcher: Prof. dr. sc. Branko
Blažević

submitted by

PETER JORDAN, PhD. Assoc. prof.

Austrian Institute of East and Southeast
European Studies, Wien, Austria

1. Croatian tourism as the study's background

By her 40 million foreign tourist
nights (out of a total of 45 million tourist
nights) in 2002, Croatia ranks 8th among
European countries (closely behind Germany

and Greece having 42 and 47 million), by her
753,000 bed-places (31 August 2002) it
occupies again the 8th position (behind Austria
and in front of the Netherlands). Among
countries in transformation Croatia is clearly
the leader in tourism. This leading role was
held already in the Communist era, when in
the second half of the 1980s (1986 and 1987)
Croatia as a part of former Yugoslavia reached
her climax as a destination of mass and seaside
tourism with almost 60 million foreign tourist
nights a year. In the course of Yugoslavia's
dissolution, however, and due to the wars
accompanying this process from 1990 to 1995,
Croatia's tourism experienced almost a total
collapse followed by a period of tiresome
recovery. This makes Croatia definitely a
special case among countries in
transformation.

Another specific aspect of Croatia's
tourism industry is its specific ownership
structure at the starting point of
transformation. This was – contrary to most
Communist countries – characterised by a dual
system of private and public ownership, albeit
with a clear dominance of the public sector.
Small tourism enterprises like family pensions,
smaller restaurants and inns were privately
owned in addition to the widespread system of
private room renting. But this private sector
was limited by law and in spite of its in total

respectable size in fact just complementary to the local and regional "flagships of tourism", i.e. hotels and larger catering facilities which were always publicly owned which in former Yugoslavia meant to be organized as self-managing enterprises. Formally these enterprises were owned by their staff, who was also entitled to elect its management. In practice, the managers had the command, but depended on bank credits and thus were exposed also to political influence, not in a few cases they were just puppets on a string. Especially at the northern coast almost all hotels and other major tourism facilities of a micro-region or commune were in the hand of such an enterprise, which in turn exerted considerable influence on the overall economic, social and political situation and development of the region, at least at the coast and on the islands, where tourism was the dominant economic factor.

It is only little exaggeration to say that Croatia's tourism industry emerged after an almost total collapse in the same profile and structure as before. This is true for type of the offer as well as for organizational structure. Who had assumed that the destructions and the almost total collapse of demand by the wars would have been grasped as an opportunity to construct a new tourism industry from the bottom complying to the new travel trends and the principles of a market economy was definitely wrong. Rather, the wars in and around Croatia accompanied by a collapse of the demand as well as political stand-still in their consequence discouraged investment, impeded reforms and conserved existing structures, in tourism even more so than in other branches of the economy.

After the political crisis had come to an end, some of the tourists "returned", but they met the same highly seasonal, spatially concentrated low-quality monotype of seaside tourism and the same dual structure of small private undertakings and large, regionally monopolist tourism enterprises, which had just changed their labels and offered the same quality of service as before. Weak business during almost a

decade, a situation of political insecurity "on the Balkans", to which Croatia as a part of former Yugoslavia was still seen as affiliated, political and legal insecurity also in the country itself and economic-strategic inactivity on the side of the government as well as the low rate of Croatia's European integration let at least by 1999 interest of foreign investors into the tourism industry not arise. The main difference between current tourism and tourism in the Communist era is the much higher level of prices, which is caused by the hard-currency policy in connection with the Kuna (strict parity with the German Mark, later with Euro), high tax rates, high overhead costs in many enterprises and the attitude to earn within a very short season what is necessary to cover high costs. Nevertheless Croatia has still the image of a low price and mass destination.

The main type of tourism in Croatia is summer recreation at the seaside connected with summer sports. This results in a concentration of tourism on the coast. The 7 coastal counties [županija] reported 96% of all tourist nights leaving to the rest of 14 counties in the interior near to nothing. This situation is reflected by the spatial distribution of bed-places and hotel beds. Even 97% of all bed-places and – in spite of the fact that the majority of cities and towns is located in the interior of the country – 92% of all hotel beds are located in the coastal counties.

Within the coast, there is a clear dominance of the northern coast, of Istria and the Kvarner. After a rather equal distribution in the 1960s and early 1970s, this dominance became apparent already in the late 1970s and in the 1980s, when motoring along the panoramic coastal highway [Jadranska magistrala] down to Montenegro lost its attraction and holiday splitting and longer weekends became *en vogue* favouring destinations closer to the generating markets. Taking into account that the vast majority of foreign tourists in Croatia enters the country by road (about 95%), technical and traffic conditions on the major routes to Croatia are also essential. In this respect too, the southern coast is handicapped, since using the transit routes across Bosnia and Hercegovina is still

regarded as unsafe and "adventurous" and access routes through Croatia are ill-equipped and overcrowded during the season. The situation will improve, when the motorway from Zagreb via Karlovac to Zadar is completed.

There do exist other offers along the coast such as quite remarkable cultural attractions, festivals, spas with wellness facilities a.o., but they could in spite of all efforts – already in Communist times – not distract visitors from their main activity of seaside recreation, attract additional tourist segments or expand the season at any remarkable extent (the seasonal peak has even sharpened after the wars).

While domestic tourism is only small in numbers (in 2002 only 5 million or 11% of all tourist nights were documented as domestic) and is therefore not really suitable for balancing losses at markets abroad, the main source of income always was and is foreign tourism. In 2002, tourist nights from EU countries had the largest share (esp. Germany 27%, Italy 12%, Austria 9%), but also transformation countries of Central Europe were well represented (Slovenia 12%, Czech Republic 11%, Poland 6%).

This structure, however, is the result of remarkable shifts during the 1990s. While before the wars (1990) the West (in political terms) had more than 80% in all foreign tourist nights, and countries as remote as Great Britain and the Netherlands were among the strongest markets, the wars practically stopped inflow from the West, except for some Austrians and Italians well acquainted with the local situation. Tourists from transformation countries looking for cheap offers partly filled this gap. Between 1991 and 1995, Czech tourists had in some years the majority in (a very reduced number of) nights. Also Slovenes (especially at the northern coast), Hungarians and Poles contributed to fill the gaps left by Westerners. In 1994, e.g., less than 40% of all foreign tourist nights were spent by tourists from the West. 1997, when the conflicts in and around Croatia had come to an end, saw already a structure similar to the

current one: half EU, half transformation countries of Central Europe. Germans, Italians and Austrians had "returned", but not Britains and Dutch. This shift of markets meant, however, a decline in possible revenues per tourist. Expenditures of East-Central Europeans, in particular of Czechs, are considerably lower than those of, e.g., Germans or Italians. Especially Czechs are known for spending "cheap holidays" at the coast and to bring food and drinks with them.

The short season with more than two thirds of all tourist nights realised only during July and August and a full occupancy of all capacities confined to these two summer months prompts an accommodation structure with a relatively low share of capital-intensive capacities, i.e. hotels, apartment hotels, hotel villages a.s.o. Their share in the overall number of bed-places is just around a quarter, but has grown from 1988 to 2002 (from 22 to 29%). Also the absolute figure of hotel beds has increased from 204 thousand in 1988 to 219 thousand in 2002, when the marinas are included into this category. The number of hotels in the narrower sense amounts to 420. They dispose over 49,390 rooms and 96,625 bed-places. The average size of a Croatian hotel is 231 bed-places, and they record average annual occupancy rates of 37.0%. In the coastal tourism regions outside the cities even these capital-intensive capacities are rarely open throughout the year. Most of them start around Easter and close after All Saints Day (1 November). On larger islands usually just one hotel is open throughout winter. The situation is different only in resorts with alternative offers, e.g. in Opatija which makes efforts to recall its glorious past as a winter health resort by offering wellness activities.

Complementary capacities like camp sites and private rooms always had and still have the largest share in the accommodation offer. They mainly help to accommodate tourists in the peak season and their occupancy rate is adequately low. Private rooms, e.g., have an occupancy rate of only 9.3%. Private room renting is nevertheless important as an additional source of income for the local population. It supports its attitude to stay in rural areas and on the islands in spite of an

very often critical economic situation. Many of those who offer private rooms are, however, people from the cities, who rent their weekend-house during summer.

When the quality of the accommodation capacities as of 31 August 2001 is taken into account 47,724 of all 95,428 bed-places in hotels and all-suite hotels, i.e. 50%, were quality beds in facilities categorized as at least three-star. 2,231 beds (2.3%) were offered by four-star hotels and 2,981 (3.1%) by five-star hotels.

Taking all these features into account one can arrive at the conclusion that the Croatian tourism industry suffers by its inherited and current structure from the following major problems:

- low occupancy due to a short season and the concentration on sun & sea tourism;
- low tourist expenditures due to the concentration on mass and sun & sea tourism;
- hotels of large size, but with small rooms, lacking additional features and offering a uniform product adapted to mass and sun & sea tourism;
- partly hypertrophic administrative structures increasing the costs.

These shortcomings are mainly policy-generated and partly common to all countries in transformation, partly specific:

(1) What shares Croatian tourism industry with other countries in transformation is that investment into tourism during the Communist period was not mainly guided by entrepreneurial criteria, but by political goals like growing quantitative output, growing numbers of employees, job security, growing revenues in foreign currency, regional development etc. Tourism policy differed in this respect not from industrial policy: both created structures with a low investment efficiency, i.e. an unfavourable ratio between invested capital and output, in other words: production units that are not profitable and not even viable under the conditions of an unprotected market.

(2) Specific problems

- war in and around the country between 1990 and 1995;
- political crisis and conflict on the Balkans at least up to 1999 (potential crisis regions are up to the present Kosovo, Macedonia, Montenegro and Bosnia-Herzegovina) affecting Croatia insofar as it is regarded as a part of the Balkans by many Europeans;
- limited international acceptance of the Croatian government till January 2000 (comparable to Slovakia up to the end of the Mečiar government in 1998);
- Croatia's exclusion from European integration processes by 2000;
- The Croatian tourism industry is due to its size and role in Croatian economy and society regarded as a sector of national interest (comparable to the energy or military sectors in other countries). When initiating reforms, Croatian governments and political actors have always to respect not just the economic aspect, but to deal with the tourism industry as a kind of "social institution" embedded into local society and (e.g. in peripheral regions like the islands and rural sections of the coast) frequently forming the focus and even generator not only of the economy, but also of social life.

The Kvarner region to which this study refers, shares most of these features common to Croatia and the Croatian coast. Nevertheless, it disposes also over some remarkable specifics. Not only that it can boast of being the nucleus of modern tourism at the eastern coast of the Adriatic (Vila Angiolina 1844 and Hotel Kvarner 1883 in Opatija), it had an early boom as a region of climatic resorts during winter, was heavily promoted as

the fashionable coast of the Austro-Hungarian Monarchy after Rijeka had been integrated into the Monarchy's railway network (1873) and has up to the present day a more diversified tourism offer and structure than other sections of the Croatian coast. The Kvarner is also composed of rather specific sub-regional identities (Opatija Riviera, Riviera of Crkvenica and Novi Vinodolski and the islands), which may well be utilised to create very individual tourism products.

2. The study's objectives

The study comprises 258 pages and is the first part of a larger scientific project on Regionalisation in Tourism under the Aspects of Globalisation and of a tourism master plan for tourism development in the County of Primorje-Gorski Kotar [Primorsko-goranska županija]. It has been elaborated by a prominent team of 13 researchers at the Faculty of Tourism and Hospitality Management Opatija, supported by students, on behalf of the Croatian Ministry of Sciences, Education and Sports.

The study's main objective is an analysis of the tourism product in the County of Primorje-Gorski Kotar, i.e. in the Kvarner and in Gorski Kotar, and its competitiveness under the aspects of sustainability in economic, social and ecological terms. It aims at providing for a sound scientific basis for improving the quality of the offer, for the enforcement of environmental protection, for a more rational use of space, for the development of a strategy for destination marketing as well as for destination management. The analysis is to be performed both at the regional (Kvarner/Gorski kotar) and the local (destination) level.

3. Methodological approach

The study achieves these objective by the method of an inquiry among the four major groups of participants in tourism, i.e. the tourists, the local residents of the resort,

the room renters and the managers in tourism. The inquiry was carried out in the year 2003 and comprised 813 tourists, 750 residents of tourist resorts, 245 room renters and 86 managers in 10 resorts of the region. All samples can be considered as representative at both the regional and the local level. Inquiries were carried out in the city of Rijeka, in 4 resorts of the Opatija Riviera (Opatija, Ičići, Lovran, Mošćenička Draga), in 1 resort of the Crkveničko-Vinodolska Riviera (Novi Vinodolski), 3 resorts on the islands (Rab, Baška, Lopar) and in 3 destinations of the Gorski Kotar (Delnice, Fužine, Lokve), although data from the Gorski Kotar are not differentiated by resorts in the study. Reasons for the selection of this sample of resorts are not presented, nor can an explanation for not including the prominent resorts of Crkvenica, Malinska and the island group of Cres-Lošinj be found.

Tourists were asked for their socio-demographic profile (country of origin, age group, sex, profession, education), their motivation and mode for/of coming to the destination as well as for their evaluation of the offer (accommodation, catering, entertainment, attractions).

Residents of the tourist resorts were asked again for their socio-demographic profile (age group, profession, education), then also for their attitude towards tourism development of their resort (including questions for their satisfaction with the local tourism offer and the integration of autochthonous components into the offer as well as for information and public activities in context of tourism development), for their attitude towards environmental development (Does industrial development endanger tourism? Does uncontrolled construction activity endanger tourism?), for their attitude towards carrying capacity, their wishes to get included into an association (of ecological or embellishment character), for their opinion about tourism management in the resort and about the performance of the local tourist association, about co-operation of local producers and the tourism industry as well as for their opinion on components and problematic issues of the tourism offer in their

individual resort, i.e. the existence and value of tourist attractions, the problem of traffic jams and lack of parking space, the problem of disproportional pedestrian density and density in shops over season, on air quality, the protection of historical monuments, tourism as a supporter of negative societal phenomena like drug consumption and criminal activities as well as of vandalism.

The questions for **room renters** included – besides for age group and education – those on the accommodation offered, on tourist loyalty, occupancy rate, their eventual intention of expanding the accommodation offer, on internet presentation, parking space for guests, need for up-to-date access examinations and education as well as on tourism development in the resort in general. Room renters were further asked for their opinion about tourism management in their resort and about the performance of the local tourist association, for complaints of tourists as well as for the impact of tourism on the local community in the social and ecological sense.

Tourism managers were specified according to sub-regions (Opatija Riviera, Crkveničko-Vinodolska Riviera, islands, Rijeka), age group, kind of occupation (functions in accommodation and catering enterprises or different kinds of public tourism management) and education. Then they were asked for tourism research activities in their individual destination, for their opinion on the impact of industrial development in the Kvarner region on tourism, on the impact of uncontrolled construction and housing activities on tourism and on the potential for expanding seasonal carrying capacity. Further questions referred to the impact of tourism on the overall development of the resort and its quality of life as well as to permanent education in tourism and management skills. Finally managers were asked for their opinion on components of the tourism offer, i.e. the natural resources of the region and resort, the kind and content of the offer, organisation of the resort, resort identity, security and information quality, on local residents and tourism employees as regards

their attitude towards tourism as well as on the top 10 and worst 10 components of the tourism offer in the resort.

All these questions are relevant and well suited to draw a comprehensive picture of the tourism offer, of its evaluation by the major groups of actors in tourism and of tourism sustainability.

Answers are presented in the form of tables displaying the empirical data as well as in a verbalised form satisfying both the need for a quick survey and for more detailed explanation. In a final comparative analysis of the degree of satisfaction of the major tourism actors with the tourism offer also a lot of illustrative graphics is applied.

4. Results

Speaking about the results of the empirical survey, they are in general not really surprising for somebody acquainted with the region, but they lay a solid scientific ground for political and economic measures and – by informing politicians and other public actors about the opinion of relevant population groups – they exert by themselves (as a kind of opinion poll) a kind of public pressure on political actors. In these latter two senses the research done is extremely valuable and necessary for tourism practice and for overall socio-economic orientation at the local and the regional level.

While results by individual resorts deviate with a few exceptions (Gorski Kotar, Novi Vinodolski in relatively many cases) not too much from the regional average, it becomes clear enough that tourists have a much more positive view on the situation than the other three groups of actors in tourism, among whom tourism managers are usually the most critical.

Satisfaction among all groups of actors is highest with the natural components of the offer, especially with climate, landscape and sea. But also the relatively good state of the environment including nature parks is highly estimated.

Components also highly appreciated are hospitality and language command of the local population as well as of employees in tourism, also the ample opportunities of making excursions.

Security, resort identity and information activities are also usually regarded as assets of the tourism offer.

In contrast, dissatisfaction was usually expressed with the following components which may be regarded as major problem areas and fields in which political action is urgent: (1) the lack of parking lots which is not surprising in a region characterised by marked relief, a narrow coast and high settlement density and which can hardly be met unless principal regulative measures are implemented (e.g. limited access for private cars at least during the season); (2) unfavourable access by air due to the unfortunate placement of the Rijeka airport at the island of Krk and the remoteness of the Pula airport; (3) overburdening by local traffic especially during the season, a fact that requires a principal solution addressed under item 1; (4) the lack of attractions and contents of tourism, especially with regard to entertainment, sports, special offers for children, health and wellness offers.

All these fields can in principal be handled. Appropriate solutions require, however, basic political decisions, co-ordinated local and regional action and in some cases (e.g. access by air) also major investment. Some results of the study, e.g. the desire for congress tourism and major cultural events in every small resort, must not be taken too seriously. Very remarkable, however, is the very critical attitude of the local population and specifically of tourism managers towards further industrialisation of the region and the uncontrolled expansion of housing.

5. Concluding remarks

This empirical study which is to be extended to all major tourism resorts in all

parts of the Primorje-Gorski Kotar County offers already in its current version a huge variety of material for further interpretation. It is scientifically well done, up to the state of the art of tourism science and specifically valuable as a basis for appropriate political and economic measures. It would be highly recommendable to take this study as a model for investigations in other Croatian counties.

6. Sources and literature

- BLAŽEVIĆ, Branko (1997): *Efficiency of the Investment and Disinvestment Process in the Croatian Hotel Industry*. In: *Turizam*, vol. 45, No. 9-10, pp. 215-232.
- Central Bureau of Statistics (2003) <http://www.dzs.hr>
- Central Bureau of Statistics (ed.) (2003): *Ljetopis 2002* <http://www.dzs.hr/ljetopis2002>
- ČIŽMAR, Sanja; POLJANEC-BORIĆ, Saša (1997): *The Privatisation of the Tourist Sector in Croatia During the Transitional and War Conditions*. In: *Turizam*, vol. 45, No. 11-12, pp. 289-300.
- ČIŽMAR, Sanja; ŠERIĆ, Mario (1999): *Market Effectiveness and Internal Efficiency of Croatian Hotel Industry*. In: *Turizam*, vol. 47, No. 4, pp. 300-315.
- DRAGIČEVIĆ, Miroslav; ČIŽMAR, Sanja; Saša POLJANEC-BORIĆ (1998): *Contribution to the Development Strategy of Croatian Tourism*. In: *Turizam*, vol. 46, No. 5-6, pp. 243-253.
- FOX, John; FOX, Renata (1998): *In Search of the Lost British Tourist*. In: *Turizam*, vol. 46, No. 4, pp. 203-219.
- HENDIJA, Zvezdana (2001): *Motives of Foreign Visitors Travelling to Croatia and Domestic Visitors Travelling Abroad* (2000). In: *Tourism*, vol. 49, No. 3, pp. 275-276.
- HENDIJA, Zvezdana (2002): *Accommodation Capacities in Croatia, 2002*. In: *Tourism*, vol. 50, No. 4, pp. 409-410.
- Horwath Consulting (1999): *Analiza stanja i rezultata turističkog sektora u Hrvatskoj*. Zagreb.
- Institute of Tourism Zagreb (2003) <http://www.iztg.hr>
- JORDAN, Peter (1997): *Beiträge zur Fremdenverkehrsgeographie der nördlichen kroatischen Küste*. Klagenfurt. = *Klagenfurter Geographische Schriften*, vol. 15.
- JORDAN, Peter; PERŠIĆ, Milena (eds) (1998): *Österreich und der Tourismus von Opatija (Abbazia) vor dem Ersten Weltkrieg und zur Mitte der 1990er Jahre*. Frankfurt

- a.M., Berlin, Bern, New York, Paris, Wien. = Wiener Osteuropastudien, vol. 8.
- JORDAN, Peter (2000): *Restructuring Croatia's Coastal Resorts: Change, Sustainable Development and the Incorporation of Rural Hinterlands*. In: *Journal of Sustainable Tourism*, vol. 8, No. 6, pp. 525-539.
 - JORDAN, Peter (2002): *Croatia*. In: CARTER, Frank William; TURNOCK, David (eds.): *Environmental Problems of East Central Europe*. Second Edition. London, New York, pp. 330-346.
 - KUNST, Ivo (1998): *Market Structure of Croatian Tourism Sector*. In: *Turizam*, vol. 46, No. 3, pp. 123-139.
 - PETRIĆ, Lidija (1998): *Tourism Policy – Goals and Instruments*. In: *Turizam*, vol. 46, No. 3, pp. 140-168.
 - RADNIĆ, Ante; IVANDIĆ, Neven (1999): *War and Tourism in Croatia – Consequences and the Road to Recovery*. In: *Turizam*, vol. 47, No. 1, pp. 43-54.
 - Republički zavod za statistiku (ed.) (1989): *Promet turista u primorskim općinama 1988*. Zagreb.

RECENZENT

Dr. sc. FRANC PAUKO

redoviti profesor u mirovini

Ekonomsko-poslovni fakultet Univerze v
Mariboru,
Slovenija

Kao redoviti profesor turističkog marketinga na Ekonomsko-poslovnim fakultetu u Mariboru, a na traženje Fakulteta za turistički i hotelski menadžment u Opatiji dostavljam sljedeće mišljenje, ocjenu i sugestije u obliku recenzije, koja se odnosi na I. fazu istraživanja navedenog projekta "Turistička regionalizacija u globalnim procesima, kojeg je glavni istraživač prof. dr. sc. Branko Blažević.

Recenzija je zasnovana na proučavanju naslovne tematike, koja mi je bila dostavljena u obimu od 258 stranica

kompjuterskog teksta i obuhvata od 7 poglavlja. Primjedbe su principijelne prirode te se odnose na pojedina znanstvena shvaćanja turizma, naročito sa stanovišta turističkog marketinga. Primjedbe su postavljene po predloženim poglavljima ali i globalno za područje tog istraživanja destinacija u regiji Kvarnera i Gorskog Kotara.

1. U uvodnom poglavlju navode se ciljevi, zadaci i sadržaj istraživanja, koji se odnose na područje proučavanja kroz četiri razine i to za turiste, stanovništvo, iznajmljivače soba i apartmana, te za menadžment turističke destinacije.
2. Za proučavanje je pije svega značajan segment turista i mišljenje stanovništva. Za istraživanje je najvažniji segment potrošača u turizmu, koji predstavlja najmjerodavnije mišljenje na kojeg se mora odnositi studija budućega razvoja regije. Zbog toga je najvažnije ispitivanje / anketiranje turista, a od sekundarnog je značaja mišljenje stanovništva. Također smatram da stanovnicima nije potrebno dodati epitet «domićnog», koji se često upotrebljava u studiji, jer se zna da se pojam stanovništvo koristi za one, koji na nekom prostoru stalno borave.
3. Mišljenja sam da je menadžment turističke destinacije sasvim samostalan aspekt promatranja od organizacijskog-poslovnog značaja, pa ga možda ovdje nije potrebno separatno obrađivati!
4. Naglašava se da su rezultati ovog istraživanja podobni za komparativnu analizu, što pretpostavlja da će isti biti dobra komparacija za rezultate daljnjih faza istraživanja tj. kada budu poznati rezultati ankete za barem dva slijedeća razdoblja za 2004., 2005. i daljnje godine. Dakle, bilo bi preporučljivo da se izvodi anketiranje kontinuirano, što je onda realna osnova za ocjenu i kontinuirano poboljšanje pojava, stajališta i svakako rezultata u pojedinim subregijama. Dakle: anketa se treba ponoviti za 2004. godinu i za svaku slijedeću ili u dvogodišnjim ciklusima!

5. Anketiranje je u ovom istraživanju provedeno u 10 turističkih destinacija, od kojih su neke veoma srodne (na primjer Opatija, Lovran, Ičići, Mošćenička Draga...) i geografski tako locirane, što je rezultiralo da su iskazani srodni pokazatelji, pa bi bilo bolje da se iskažu podaci za cjelovitu homogenu subregiju - ne pojedinačno kao do sada. Pretpostavljam da se rezultati među tim gradovima (od Opatije do Mošćeničke Drage) ne mogu se suviše razilaziti, pa bi preporučio bih da se regija ponovo grupira po homogenijim geografskim jedinicama!
6. Nisam dobar poznavatelj prilika, no nameće mi se pitanje - zar se Rijeka može tretirati kao turistička destinacija? Radi se prvenstveno o turističko-logističkom distribucijskom centru za potrebe cijelog područja Kvarnera, pa po mom mišljenju nema osnove za usporedbu sa ostalim turističkim destinacijama koje imaju tipičnu turističku orijentaciju. Prema tome nema prave komparacije sa spomenutim turističkim destinacijama.
7. Rezultati empirijskog istraživanja po pojedinim grupama, odnosno aspektima uključuju i pitanja o «zemlji porijekla turista». Time se ukazuje na statističke numeričke podatke koji ne koriste analitiku tržišta, jer ne ukazuju na kvalitetu turista! Nameće se stoga pitanje - zar se svi Nijemci jednako ponašaju? Oni iz Bavarske i Prusi iz Berlina? Ima velikih razlika u potražnji za određenim asortimanom usluga hrane i pića i sl. Slične primjere se mogu dati i za druge zemlje a golemi statistički sumarni podaci ne pružaju takve vrste diferencijacija. Stoga predlažem da se u slijedećim istraživanjima za glavne vrste zemalja porijekla specificirati i uže regije, čime će se dobiti prava slika fizičkog ponašanja pojedinog užeg segmenta koji su za turizam značajni.

Starosna dob turista također nema praktične vrijednosti ako se kao sada

grupiraju turisti po suviše uskim starosnim dobima (10 godina razlike), stoga bih preporučio veće dobne skupine npr. od 26 do 45 godina. Naime turisti te dobi su investicijsko intenzivni a to znači i razmjerno manji potrošači u turističkoj destinaciji. Suprotno tome dobna skupina između 46 godina i više već «investicijski sanirana», pa se od njih može očekivati znatno jača potrošnja- što je veoma značajno i s ekonomskog aspekta. Dakle, pitanja o zanimanju turista (profesiji) postavljena s aspekta prihoda (financija, moguće potrošnje...) moraju biti s time povezana. No, osim toga treba imati na umu najznačajnije profesije, koje mogu imati značajan utjecaj na financijske učinke turizma. Moglo bi se u anketi npr. navesti: tehnička zanimanja, pedagoški, umjetnički, slobodne profesije, nezaposleni (studenti, đaci...), što je za obradu puno korisnije od pitanja koje je postavljeno - «obrazovanje turista» što sa marketinškog aspekta nema mnogo značaja, jer obrazovanje uobičajeno nema korelaciju s visinom turističke potrošnje.

Broj posjeta destinaciji nije najbolji indikator komparacije, ako sagledavamo trend porasta ili upada u nekoj destinaciji, ali bi za tržišnog analitičara bilo veoma interesantno saznati razloge, zbog čega se turisti odlučuju za ponovni dolazak. Ovaj indikator je veoma značajan s polazišta unapređenja ponude turističke destinacije u sljedećem razdoblju. Slične opaske se odnose i na oblik prijevoza koji se može procjenjivati kroz niz razdoblja, a u korelaciji s ulaganjem u infrastrukturu, lokalni promet i promet u mirovanju, kvalitetu objekata, asortiman ponude...

Kvaliteta smještaja u destinaciji mora uključivati i kriterije na čemu se zasniva procjena te kvalitete kako ukupne ponude destinacije tako i pojedinačne (ugostiteljska ponuda, lokani prijevoz, ponašanje drugih ponuđača kulturne, sportske i druge ponude...). Ponovno treba naglasiti da samo na kvaliteti smještaja nije moguće ocjenjivati ukupnu ponudu turističke destinacije!!! To je povezano i s motivacijom turista za kraći

ili duži boravak, a istraživanje motivacije dovodi za utemeljenih zaključaka, što nam je potrebno učiniti da bi se mogao produžavati boravka u nekoj destinaciji u svakom slijedećem razdoblju.

8. Dobar je prikaz pojedinih destinacija prema rang-u 10 najboljih i najproblematičnijih elemenata turističke ponude destinacije. Pri tome istakao da je od posebne vrijednosti slika u kojoj se rangiraju elementi, kojima su turisti najmanje zadovoljni. Svakako bi bilo korisno ovu rang-listu dopuniti detaljnijim obrazloženjima tj. navođenjem konkretnih ali najvažnijih negativnih razloga. To je nužno istražiti u slijedećem anketama, a time i ukazati na potrebu eliminiranja negativnih utjecaja u svakoj slijedećoj fazi koncipiranja turističke ponude. Npr. potrebno je obrazloženje, zašto na primjer rangiramo «organizacija i sadržaji zračne luke» na visoko druge negativno mjesto? Potrebno je ukazati na bit nezadovoljstva - tj. da li je za nezadovoljstvo razlog to što nije dobar zemaljski prijem putnika, mogućnost odlaska u destinaciju, organizacija dolaska u zračnu luku itd...
9. Negativno rangirane stavke po pojedinim destinacijama trebalo bi tako specificirati, da svaka od njih ukaže na propuste, greške i kriva shvaćanja u postavljanju razvojnog koncepta destinacije, čime bi sigurno rezultati ovog istraživanja dobili na vrijednosti.
10. Rezultati empirijskog istraživanja stavova stanovništva u turističkoj ponudi uključuju visoko učešće mladih od 16 do 25 godina, koji još nemaju dovoljno objektivnih pogleda na turizam i pojedine segmente turista. Stoga se postavlja pitanje, zašto upravo toj dobnoj skupini dati toliko značenje? Pitanja vezana za zanimanje anketiranog stanovništva važno je samo za one, koji direktno sudjeluju u turističkoj ponudi (npr.: ugostitelji, prijevoznici, agencijski službenici, službenici u kulturnim ustanovama-kazališta, kino, muzeji, i sl.). Zaposlenost u tim profesijama ima bitni utjecaj na mišljenje odnosno ocjenjivanje specifične turističke ponude. Stavovi stanovništva prema razvoju turizma su uvijek problematični, jer se pojavljuje često njihovo zadovoljstvo ponudom, koje predstavlja visok stupanj subjektivizma. Određena ponuda uvijek je za njih dobra, odlična... Zbog toga po mom mišljenju ne treba ocjenjivati zadovoljstvo stanovništva, jer je u najviše slučajeva subjektivno!
11. Problematika uključenosti autohtone ponude nije dovoljno razrađena, pa se postavlja pitanje, koji su reprezentativni elementi - proizvodi, usluge? Potrebno je stoga navesti primjere koji će omogućiti da se može ocijeniti pojedinačni stupanj uključenosti, a to onda postaje realna osnova za kreatora turističke ponude destinacije da se uključe u inoviranje ponude i njen kontinuirani razvoj? Zadovoljstvo stanovništva turističkom ponudom je također dosta problematičan aspekt, jer se zna da je ponuđač uvijek zadovoljan, što ne znači da će takvo mišljenje biti dobiveno i od strane turista! Da li je turista zadovoljan? Tvrdim da objektivno turističku ponudu mogu ocjenjivati samo turisti, ali ne i stanovništvo, koje time laska sebi i ponudi u kojoj može uzeti učešće! Općenito smatram da zadovoljstvo stanovništva je rijetko objektivna kategorija ispitivanja. Stanovništvo uvijek ukazuje na manjkavost turističke nadgradnje, a pojedini turistički ponuđači dobro poznaju svoje mane i potrebe. Zbog toga cijelo poglavlje o zadovoljstvu stanovništva ocjenjujem dvojbenom za dobru analizu sadašnjeg stanja i kao osnove za budući razvoj turističke destinacije!
12. Naglašavam da «treba stvoriti nove vizije turizma...», ali ne na željama stanovnika destinacije, već temeljeno na potrebama turista iz Hrvatske i drugih država. Znači da moramo sustavno istraživati njihova mišljenja, potrebe i želje a na tim polazištima oblikovati ponudu određene

- turističke destinacije! Smatram da samo obrazovanje ne utječe na mišljenje o turističkoj ponudi, naime, svejedno je kakav stupanj obrazovanja imaju turisti pošto oni žele za vrijeme boravka u destinaciji imati što veći komfor i određenu materijalnu ponudu i usluge.
13. Lojalnost gostiju - tvrdim da gosti nisu nužno nelojalni prema ponuditelju ukoliko se ne vraćaju opet u istu destinaciju. Treba imati na umu da važi u turizmu princip «*variatio delectat*» (promjena veseli). Suvremeni turista želi promjene, dakle upoznati nove destinacije i drugačiju ponudu, što je i osnova za ovako značajne turističke migracije u svijetu.
 14. Namjera proširenja smještajnih kapaciteta se u ovom ispitivanju može dvojako shvatiti. Zapitati se možemo dali ponuđača kapaciteta stručno upozoravamo na moguću problematičnost povećanja kapaciteta, također zbog razmjerno visoke sezonalnosti. Događa se naime, da se krediti, zatraženi kod banaka, kasnije ne mogu otplaćivati, jer su ponuđači imali previsoke pretenzije, pa turistički razvoj nije slijedio pogrešne procjene.
 15. Menadžment turističke destinacije je prije svega menadžment turističkih ponuđača (hoteljери, prijevoznici, agencije, kulturne te sportske organizacije...) kao najodgovorniji činitelj poduzetničkog menadžmenta, dok u drugi plan dolaze gradske, općinske i županijske uprave, dakle u buduće naglasak mora biti na komercijalni a ne javni menadžment.
 16. Osiguranje ekološke ravnoteže treba povezati s pitanjem - zbog čega postoji ugroženost? Nekomolirana izgradnja kapaciteta ne može se dešavati, jer je ovo isključivo u kompetenciji javnih organa - općine, urbanističkih zavoda... Ako se ovo dešava, treba naglasiti da su u destinacijama zatajile spomenute službe!
 17. Sadržaji na razini Kvarnera - naglašava se da je «najniže ocijenjena ponuda i kvaliteta zdravstvenog turizma, kongresne ponude i kvaliteta zabavnih sadržaja. Smatram da se paušalno ne može govoriti o lošoj kvaliteti jednih te drugih... Predlažem da se izdvoje elementi unutar «zdravstvene ponude, kongresne te one zabavnog sadržaja», pa svaki između njih ocjenjivati ovisno o ponuđenim proizvodima i uslugama. Ovo važi također za «organiziranost destinacija», gdje se opet navodi primjer zračne luke - treba pojasniti što tamo ne valja, te predložiti postupke koji će osigurati da se pređe ka sanaciji.
 18. Rezultati empirijskog istraživanja stavova turističkog menadžmenta o turističkoj ponudi... u perspektivi treba temeljiti na anketama, koje će sam destinacijski menadžment permanentno provoditi direktno upitnicima turistima, a ne na osnovu vlastitih ocjena/konceptima koji su rezultat nekih usuglašavanja, razmišljanja možda na sjednicama menadžmenta i sl.. Treba izbjegavati percepcije teoretičara koje se ne zasnivaju na osnovu praktičkih spoznaja «na terenu». Smatram da je jedini pravilni rezultat onaj, koji se zasniva na mišljenju turista svake godine, u svako doba boravka u destinaciji. Znači da ovaj ulomak nije analiza stanja već preporuke koje treba unijeti u II. fazu studije, na osnovu spomenutih anketa turista. U suprotnom slučaju izvještaj se zasniva na teoretskim pretpostavkama destinacijskog menadžmenta.
 19. Izračun prihvatnog potencijala treba proizlaziti iz izračuna službi u prostornom programiranju. Takvo bi buduće predviđanje izvodili urbanisti na osnovu trendova dolaska turista po pojedinim godinama, a zasnovano na tržišnim istraživanjima po pojedinim zemljama izvora turista. Ako se pak pokazuje da su neke destinacije već «zagušene» turističkim kapacitetima, onda se turistička promocija destinacije ne intenzivira, već se ulaganja usmjeravaju u «normalno održavanje» pozitivnog

imagea turističke destinacije i u podizanje kvalitete kapaciteta i usluga. Stavovi menadžmenta trebaju proizlaziti iz permanentnih studija istraživanja tržišta, dakle iz mišljenja turista. Zbog toga je potrebno, po mom mišljenju, postaviti upitnike direktno turistima u destinacijama.

20. Asortiman ponude po destinacijama ima sadržajne propuste, jer su stavke ponude suviše globalno postavljene. Preporučujem da se prošire na pitanja pojedinih specifičnih manifestacija s područja:
- kulturne ponude, pri čemu mislim na ponudu ustanova:
 - kazališta (drama, opera, balet);
 - kinematografi (po vrstama – tematici filmova);
 - filmske prezentacije po uzoru «son et lumiere»;
 - izložbe, galerije, muzeji
 - glazbeni nastupi / koncerti
 - profesionalni i amaterski (zborovi, crkveni koncerti, mjusical;
 - ponuda religioznog karaktera (crkveni praznici, mise...);
 - etnografska ponuda...;
 - promet po pojedinim prijevoznim javnim servisima - treba i razraditi područja transporta po kopnu – cesta, željeznica i po moru, uključivo marine...);
 - ponudu agencija treba razraditi po vrstama (tematici) izleta;
 - sportsku ponudu treba diferencirati po granama sportova;
 - priredbe zabavnog karaktera trebaju se razvrstati po tematici, različiti za pojedine želje turista, i slično...
 - Također potrebno je specificirati zdravstvenu ponudu na:
 - prvu pomoć,
 - bolničku ponudu,
 - ostalu lječilišnu ponudu,
 - stomatološku ponudu,
 - preventivne zdravstvene programe i slično...

Sve dok takva pitanja nisu uključena rezultati o stanju kulturne, zdravstvene i sportske ponude po destinacijama nose određene nedostatke! Tvrdim da su spomenute manifestacije statistički mjerljive pomoću ulaznica, financijskih efekata i frekvencijom izvođenja tijekom turističke sezone odnosno cijele godine. Ovu dopunu možemo/trebamo svrstati kao ponudu destinacijskog managementa. U tom pogledu smatram propust u ovoj studiji pa se treba dime dopuniti!! Turističku destinacijsku ponudu treba dakle shvatiti mnogo šire, ne samo u pogledu ugostiteljske ponude!

21. Zadovoljstvo elementima turističke ponude u destinacijama - ne može se ocijeniti globalna slika zadovoljstva gosta destinacijskom ponudom, sve dok se dosljedno ne unesu i svi prethodno naglašeni elementi integrirane ponude niza parcijalnih elemenata. Komparativna analiza može se i zasnivati na usporedbi s destinacijama susjednih regija, barem onih, koje graniče s turističkom destinacijom Kvarner. To je u prvom redu turistička destinacija "Istra" ili one koje inkliniraju crkveničkome području. Smatram da su ovo ipak geografske destinacije malenog opsega, a da turisti traže šire područje migriranja za vrijeme njihovog boravka na kvarnerskome području. U cijelosti se slažem sa stavovima istraživača iznijetim u okviru sumarne ocjene elemenata turističke ponude Kvarnera, jer ukazuju da su se sagledali globalni problemi, ali da ih u ovom inicijalnom istraživanju nije bilo moguće u cijelosti uvažiti.
22. Zaključak. Smatram da treba «zaključku dodati u početnoj rečenici da je ovo analiza samo nekih elemenata turističke ponude, u smislu ranije elaboriranih nedostataka. Ponuda, koja se zasniva na statističkim podacima je korektno ocjenjena, možda čak i suviše preciznim izračunavanjima. S druge strane zapažam golemo ponavljanje nekih indikatora koje možemo sumarno prikazati na jednom mjestu. Potrebno pak bi bilo šire tumačenje nekih negativnih pojava s

namjerom da se u II. fazi studije iskažu kao startne točke za planirano poboljšavanje pojava u smjeru savršenije turističke ponude po destinacijama kvarnerskog područja. Pri tome neka se akcentira ona ponuda, koja može istupati od prosjeka tako da bi se na razini destinacije u buduće dobila jača specifična ponuda onih elemenata, koje druge možda nemaju. Time se ukazuje da ne valja suvišna «parcelizacija» po sadašnjim destinacijama, nego da se propagandnim putem koncentriraju one destinacije, koje su geografski susjedne i koje imaju homogeniju ponudu (npr. "Opatijska Rivijera" kao cjelina - od Opatije do Mošćeničke Drage). Ovo važi naročito za inozemni turizam koji se u sadašnjoj disperziji destinacija ne može najbolje uočiti. Koncentracija destinacijskog prostora bi došla do jačih efekata pogotovo pomoću brojnih izletišnih migracija u kojim mogu dosta dobro sudjelovati turističke agencije svojim dnevnim programima za stalne goste u kvarnerskom zaljevu.

23. Preporučujem da se u fazi II izrade ovog projekta više akcentira direktna turistička operativa sa svojim poduzećima (lanci hotela i restorana, privredne organizacije u transportu kopnom i morem) i slično... jer su ipak u krajnjom redu oni direktni ponuđači turističkih djelatnosti.

Time se zalažem s druge strane da se vrše udruživanje kulturne i sportske te zdravstvene ponude na razini dvaju ili više destinacija, na principu destinacijskog menadžmenta, jer je drukčije parcijalno sagledavanje osuđeno na manje financijske efekte. Ovo govori i u prilog ciljevima «stvaranja čvršćih veza, kako je to naglašeno i od strane samih autora. Time bi se na bolji način pristupilo globalizaciji ponude u kvarnerskom prostoru.

Na kraju još napomena: potrebno je zahvaćanje širokog dijapazona usluga turističke ponude, kako je već nekoliko puta naglašeno (kultura, sport, zabava, zdravlje....) jer je turizam ipak mnogo širi pojam, što je naročito važno i za poimanje turističke privrede. To će biti i poticaj unapređenju u području turističke statistike, gdje se dosad dosta griješilo, jer su se iz turizma isključivali kulturni, zdravstveni i sportski elementi ponude. Nema nikakvih opravdanja da i u buduće spomenuta specifična turistička ponuda ne bude involvirana u buduće programiranje asortimana ponude, te cjelovito uključena u turistički marketing šire destinacije Kvarnera.

Maribor, 29.03.2004.

RECENZIJA

Akademika Vladimira Stipetića

ZA PRILOG GRUPE AUTORA

**"OCJENA TURISTIČKE PONUDE
KVARNERA"**

*(glavni istraživač: prof. dr. sc. Branko
Blažević)*

a kao rezultata

*PRVE FAZE ISTRAŽIVANJA NA PROJEKTU BR.
011603*

**"TURISTIČKA REGIONALIZACIJA U
GLOBALNIM PROCESIMA"**

***publicirana je u tematskom broju
časopisa***

***"Tourism and Hospitality Management"
Vol. 10, No. 1, 2004., str. 273 - 276***