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DUBROVNIK'S COMEBACK TO THE TOURIST MARKET

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Summary

The paper analyzes the loss of the tourist market as a consequence of the war in the Dubrovnik region, beginning in the 1990's. Presented are the enormous devastations of war, which weakened fundamental tourist activities to a frightening extent, and the great, both direct and indirect financial and other losses which resulted from the absence of Dubrovnik on the tourist market and the exclusion of this once very popular destination from the more intensive tourist tracks. Special attention is paid to structural changes and to their possible effects on foreign tourist demand during the comeback years, specifically, the return of Dubrovnik to the tourist market, according to the residency status of tourists coming to the Dubrovnik region.

An analysis of the existing situation reveals, irregardless of present difficulties, that a significantly different approach to tourism is necessary. This implies the defining of long-term strategic goals, to specifically determine towards which market segments products should be directed and the development of a contemporary tourist marketing system. The key problem lies in returning Dubrovnik to the previous traditional and more demanding markets. As such, the tourist product has to have more quality, with a more pronounced emphasis on historical and cultural heritages, while marketing policies have to be aimed towards specific market segments. The paper stresses how Dubrovnik possesses the potential of achieving originality and variety in comparison to other competitive destinations.

Key words: *tourist market, war, losses, tourist product, marketing system, strategic goals, positioning*

INTRODUCTION

Prior to the aggression, that is, up to the beginning of the 1990's, the Dubrovnik region was one of the leading tourist destinations in the Croatian Adriatic region. However, the war almost completely wiped Dubrovnik off European, world and domestic tourist maps, resulting in indirect and long-term losses. The enormous destruction devastated the tourist product to a great extent, the effects of which will be felt long-term.

In spite of all the troubles which had befallen Dubrovnik, it is now gradually making a comeback to the tourist market. This comeback is slow, but marked with changes which affect the structure of foreign tourist demand. Obviously, with only one eighth of pre-war foreign "tourist nights", it is not possible to deliver final conclusions, but attention must be brought to the fact that there is a tendency present of "accepting" Dubrovnik on financially weaker and less demanding markets, which only strengthens the concept of a cheaper, low quality, tourist product.

Dubrovnik's return to the lost tourist market, actual movements, as well as problems presaging a lower quality of supply, which were most definitely present even before the 1990's, indicate how a completely different approach to tourism is necessary.

Orientation of this kind must be based on long-term goals in tourism, a long-term development strategy, dynamic and systematic marketing, a richer, more various and original tourist product of higher quality, significantly emphasizing historical and cultural features and a tourist policy which is simultaneously active and completely open to the market.

Due to the availability of data and the possibility of comparing pre-war and post-war tourist traffic, this paper analyzes the former region of the Dubrovnik municipality which, according to new territorial delineations dating from the end of 1992, or rather from the beginning of 1997, is comprised of the City of Dubrovnik, as well as municipalities along Dubrovnik's coastal region, Janjina, Konavle, Mljet, Ston, Trpanj, and Zupa Dubrovačka.

1. LOSING THE MARKET IN THE EARLY 1990's

Only really great and long-term personal risks can deter a visitor from the well-trodden tourist lanes, or influence tourists to completely bypass a once favorite tourist destination, such as was the city of Dubrovnik, with its surrounding, developed tourist supply.¹

1 In 1989, the participation of Dubrovnik's (Dubrovnik region) hotel

The high rate of risk here was caused by war and indiscriminate destruction which lasted four years, with intermittent breaks. However, the tension that was already present throughout the region, as well as the start of the aggression on Croatia, contributed towards almost completely erasing Dubrovnik from tourist maps, already during the tourist year of 1991.²

The consequences of the civil war in Croatia were very severe, and can still be keenly felt in all areas of life. Great human sacrifices, as well as victims, the physical destruction of natural, cultural, residential, infrastructure and commercial buildings, the decrease or halt of economic activities, the great efforts given to strengthening national defence forces for the defence and liberation of occupied territory, all this contributed to a weakened country and made it impossible to center awareness on economic problems of development. In such circumstances, tourist traffic is also significantly reduced, so that in the war year of 1992, tourists were registered only at 129 sites, which is 62,5% less in comparison to the year prior to the war (1990), when there were 344 active tourist sites in Croatia.)³

The negative effects of war were distinctly expressed in the Dubrovnik region, where tourist traffic was almost absent, due to the proximity of the front lines, which resulted in traffic isolation and in the economy being shaken.⁴

capacities (hotels + tourist settlements) in Croatia was 10,6%, and in other forms of accommodation 5,6%. In the Dubrovnik region in 1989, there was 8,3% of total visits and 7,9% of total tourist nights noted in Croatia; 8,7% foreign arrivals and 7,8% foreign nights (calculated from data available in the Analize turističkog prometa na području općine Dubrovnik in 1989 (1990), TSO, Dubrovnik, 7., 43.)

- 2 Even though the Dubrovnik region was directly attacked beginning October 1991, at the end of the tourist season, this year showed only 14,3% of the total nights from 1990, rather 11,2% nights for foreign tourists. In comparison to the last normal tourist year in 1989, it is 13,1% of total nights and 10,7% of foreign nights (calculations based on data from Promet turista u primorskim općinama in 1989, dokumentacija 775 (1990.), RZS, Zagreb, 18.; Promet turista u primorskim općinama 1991., dokumentacija 848 (1992.), RZS, Zagreb, 18.)
- 3 Cf. Hendija, Z., Ivandić, N., Mikačić, V., Radnić, A. (1996.), Promjene u turizmu Hrvatske pod utjecajem rata, Zbornik radova "Susreti na dragom kamenu", knjiga 20, Fakultet ekonomije i turizma "dr. Mijo Mirković", Pula, 185.
- 4 In comparison to 1990, in the Dubrovnik region with 8,5% of total tourist traffic (nights) for Croatia and 8,6% foreign nights, in 1992 a symbolic 0,1% (0,08% foreign) - calculated according to the Analizi turističkog prometa na području općine Dubrovnik in 1990 (1991.), TSO, Dubrovnik, 2. and Promet turista u primorskim općinama 1992., dokumentacija 902 (1993.), DZS, Zagreb, 12., 16.

Most tourist activities were thwarted, so that overall tourist traffic for 1992 showed only 4 008 visits, of which 2 466 were domestic and 1 542 were foreign tourists, altogether representing 14 631 nights; of this, 8 454 were domestic and 6 177 were foreign.⁵

Over a number of years, the drop in tourist traffic to an exceptionally low level⁶ caused great economic and financial losses to the Dubrovnik region, and to other activities directly or indirectly tied to tourism. Namely, up to the outbreak of war, the hospitality and tourism sector had a profound influence on the overall economy, which received great encouragement and income directly from tourist activities.⁷

Tourism and hospitality sectors led the Dubrovnik economy, employing well over a third of those employed in commerce,⁸ and contributing towards its own advancement and to the efficiency of the overall economy by achieving good business results.

Research shows that the "cumulative index of relative efficiency" (CIRE) for the Dubrovnik economy towards the end of the 1980's was 118,98, which was significantly better than the average for the Croatian economy (80,00).⁹ CIRE for Dubrovnik in hospitality and tourism showed 110,98 and was better than the average economy for the Dubrovnik region (100,00) and for Croatian tourism and hospitality (100,00).¹⁰

The Dubrovnik region was the target of Serbo-Montenegrin cannonfire for five years. This is the reason for the significant decrease in tourist traffic noted from 1991 to 1995. It was only in the relatively quiet year of 1996 that tourism showed a more intense re-entry, with an increase in visits and nights of both domestic and foreign tourists, which continued

5 In 1989, in the Dubrovnik region, 805 346 tourists, 4 898 785 nights. Tourist traffic in 1992 is only 0,5% (visits), 0,3% (nights) traffic from 1989. (calculated according to data from the Analize turističkog prometa ... 1989. o.c., 8. ; *Promet turista u primorskim ...*, 1992., o.c., 12., 16.)

6 From 1991 to 1995, yearly average nights (190,6 thousand) only 3,9% traffic from 1989 (calculated according to data from sources in - infra - tabl. 1. years in question)

7 It is estimated that in 1991 only, revenues lost for all activities amounted to 510,1 million DEM (according to *Gospodarska obnova Dubrovačke općine* (1992), Effect, dubrovnik, 6.)

8 Cf. Skupina autora (1990.), *Prioritetni pravci razvoja turističke ponude Dalmacije* (sažetak Projekta), FTVT, Dubrovnik, 63. According to the same source, traffic employed 18,2%, trade 18,0%, industry 14,9%, together with hospitality and tourism 84,3% (in 1989.)

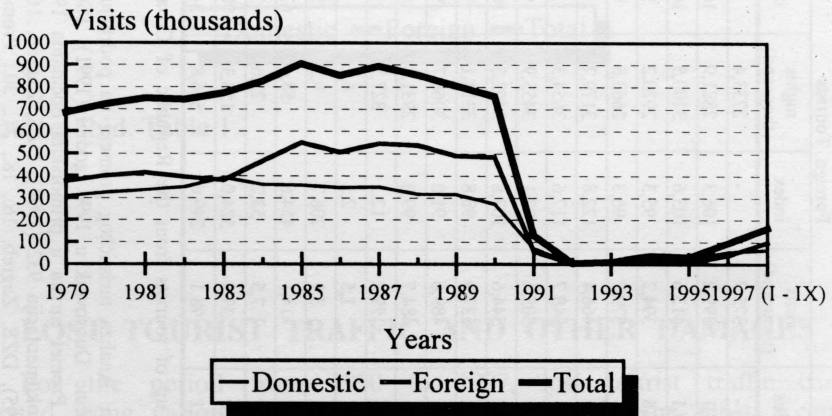
9 CIRE is calculated in the cited study, "Prioritetni pravci razvoja turističke ponude Dalmacije", (p. 78) as an indicator in relationship values: income per employee, bruto salary per employee, income according to average used funds, net gain according to average used funds and total income according to expended funds.

10 Skupina autora (1990.), *Prioritetni pravci razvoja ...*, o.c., 78.

into 1997 with even greater increases. However, the average for these two years is only a little greater than 1/8 of the total nights and somewhat more than 1/13 of the foreign tourist nights noted in 1989 (Table 1, Figure 1, 2).¹¹

The data obviously shows that tourism in the dubrovnik region is gradually making a recovery, rather, that dubrovnik is making a comeback to the tourist market. However, the initial results should not deceive anyone into thinking that it will be an easy and fast route, as during the past seven conspicuous years of a tourist "drought", much has been lost in finances, market power, market potential and market orientation.

Figure 1.
Domestic and foreign tourist visits to the municipality of Dubrovnik



Source: Compiled acc. to data from Table 1.

11 Calculated from data in sources noted in Table 1. Tourist traffic in the fourth quarter of 1997 has been estimated by the author based on data I-IX. 1997. Among the foreign tourists in 1989, included are tourists from the Former Yugoslav Republic.

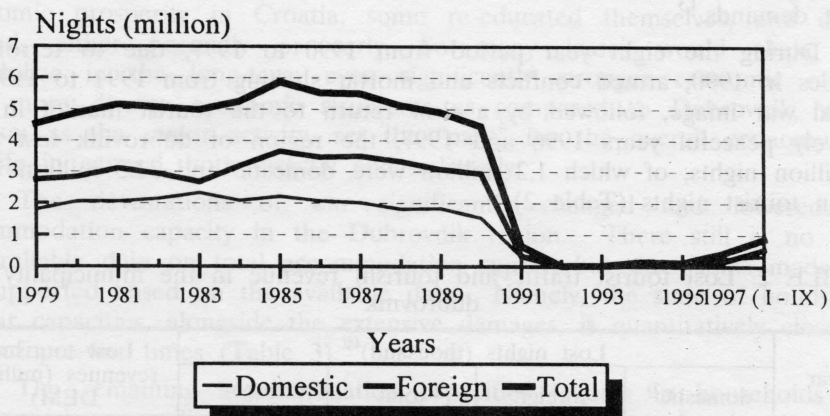
TABLE 1. Tourist traffic in the Dubrovnik municipality

Year	Domestic Tourists			Foreign Tourists			Total			
	visits (thousand)	index	nights (thousand)	visits (thousand)	index	nights (thousand)	visits (thousand)	index	nights (thousand)	index
1979.	307,9	-	1796,1	375,7	-	2733,4	683,6	-	4529,5	-
1980.	323,2	105,0	2049,5	399,2	106,3	2821,9	722,4	103,2	4871,4	107,5
1981.	335,5	103,8	2051,2	413,6	103,6	3100,5	749,1	103,7	5151,7	105,8
1982.	348,7	103,9	2142,8	394,2	95,3	2920,2	742,9	94,2	5063,0	98,3
1983.	391,9	112,4	2320,8	379,7	96,3	2663,8	771,6	103,9	4984,6	98,5
1984.	359,4	91,7	2078,8	466,4	122,8	3179,7	825,8	107,0	5258,5	105,5
1985.	356,4	99,2	2213,9	548,7	117,6	3654,3	985,1	119,3	5868,2	11,6
1986.	346,0	97,1	2069,0	505,4	92,1	3455,9	851,4	86,4	5524,9	94,1
1987.	348,0	100,6	2003,4	544,6	107,8	3492,3	892,6	104,8	5495,7	99,5
1988.	316,2	90,9	1806,9	537,9	98,8	3314,1	854,1	95,7	5121,0	93,2
1989.	315,8	99,9	1830,1	489,6	91,0	3068,7	805,4	94,3	4898,8	95,7
1990.	272,1	86,2	1529,5	484,7	99,0	2931,8	956,8	94,0	4461,4	91,1
1991.	71,4	25,2	312,3	59,2	12,2	327,3	130,6	17,3	639,6	14,3
1992.	2,5	3,5	8,5	1,5	2,5	6,2	4,0	3,1	14,7	2,3
1993.	6,1	244,0	15,9	3,1	206,7	9,3	9,2	230,0	25,2	171,4
1994.	23,9	391,8	96,0	14,1	454,8	58,4	3,0	413,0	154,4	612,3
1995.	23,7	99,2	96,7	7,5	53,2	22,6	31,2	82,1	119,3	77,3
1996.	56,3	237,6	261,7	39,3	524,0	158,3	95,7	306,7	420,0	352,1
1997. (I-IX.)	64,9	115,3	316,8	98,1	249,6	546,8	163,0	170,3	863,6	205,6

¹ Since 1992, the domestic tourist category is made up of tourists from the Republic of Croatia only, tourists from ex-Yugoslavia are included with the foreign tourists

Source: Compiled and calculated based on data from: Analiza turističkog prometa na području općine Dubrovnik u 1989. godini (1990), TSO, 14., 17.; Analiza turističkog prometa na području općine Dubrovnik u 1990. godini (1991), TSO, 3.; Promet turista u primorskim općinama 1991., Dokumentacija 848 (1992), RZS, Zagreb, 18.; Promet turista u primorskim općinama 1992., Dokumentacija 902 (1993), DZS, Zagreb, 16.; Promet turista u primorskim općinama 1993., Dokumentacija 932 (1994), DZS, Zagreb, 16., 18., 22., 24.; Promet turista u primorskim gradovima i općinama 1994., Dokumentacija 963 (1995), DZS, Zagreb, 16., 18., 21., 30.; Promet turista u primorskim gradovima i općinama 1995., Dokumentacija 994 (1996), DZS, Zagreb, 16. 18.; Ured za turizam Županije Dubrovačko-neretvanske, interna dokumentacija, s.p.; Ured za statistiku ŽDN-e, interna dokumentacija, s.p.

Figure 2..

Domestic and foreign tourist nights in the municipality of Dubrovnik

Source: Ibid. Table 1..

2. LOST TOURIST TRAFFIC AND OTHER DAMAGES

For the period from 1990 to 1997, lost tourist traffic can be estimated using various methods. However, it seems the most acceptable approach is that of "1989 and the following years". That is, the assumption that in all the subsequent years, 1990, 1991, 1992, 1993, 1994, 1995, 1996 and 1997, it would be realistic to expect the kind of tourist traffic appearing at the end of the 1980's, specifically in 1989.

1989 is taken as a year of "reckoning" as it is the last year to record "normal" business in tourism, at least in relation to domestic circumstances influencing the "pleasure industry".¹² The second half of the

12 Undisguised Serbian terroristic acts in Croatia mid-August 1990 affected the above average decline in tourist traffic from August - December 1990; index total nights August 1990 /August 1989. = 87; index total nights VIII.-XII. 1990./VIII. - XII. 1989. = 88, index nights, for the same period, then foreign tourists = 90 (calculated acc. to Analizi turističkog prometa ... 1990., o.c., 37.)

1980's is characterized by a continuance in the negative movements of dubrovnik tourism, as a result of the country's general economic state and the weakening of Dubrovnik's position on the tourist market, in the first instance caused by the quality of its own supply, to be precise, by the fall in quality of the dubrovnik tourist product with respect to contemporary tourist demands.¹³

During the eight year period from 1990 to 1997, due to terroristic activities in 1990, armed conflicts and mortar shelling from 1991 to 1995, a general war image, followed by a slow return to the tourist market in the relatively peaceful years 1996 and 1997, the region of dubrovnik lost over 32 million nights, of which 1.2 million were domestic and 31.3 million were foreign tourist nights (Table 2).

TABLE 2. Lost tourist traffic and tourism revenue in the municipality of dubrovnik

Year	Lost nights (thousand) ¹⁾				Lost tourism revenues (million DEM)
	domestic ²⁾	foreign	total	%	
1990.	33,7	403,7	437,4	8,9	21,87
1991.	173,4	4.085,8	4.259,2	86,9	212,96
1992.	289,8	4.594,3	4.884,1	99,7	244,21
1993.	282,4	4.591,2	4.873,6	99,5	243,68
1994.	202,3	4.542,1	4.744,4	96,8	237,22
1995.	201,6	4.577,9	4.779,5	97,6	238,97
1996.	36,6	4.442,2	4.478,8	91,4	223,94
1997.	(+30,9)	4.042,5	4.011,6	81,9	200,50
Total	1.188,9	31.279,7	32.468,6	82,3	1.623,43

1) Estimates in lost traffic calculated according to tourist traffic in 1989.

2) Tourists from Croatia.

Source: Calculated (nights) according to data from sources noted in Table 1.; TOMAS '94. (income). Nights for all of 1997 estimated by author.

If we start with the assumption that the average daily expenditure of a tourist in Croatia in 1994 was about 50 dEM¹⁴, then we can assume that the dubrovnik region lost more than 1 600 million dEM in revenues from foreign and domestic tourists (Table 2).

13 In 1989, 7.4% less nights of foreign tourists and 4.3% total nights in comparison to 1988. Total tourist traffic in 1989, only 81.8% visits and 83.5% nights from 1985. (calculated from data in Table 1).

14 According to TOMAS '94. (1994.), Stavovi i potrošnja turista u Hrvatskoj, Institut za turizam Zagreb, Zagreb, 20.

The financial losses are indeed great, but they are not the only losses. The departure (loss) of the principal professional workforce, as well as other workers (from 7 000 to about 4 000 in 1996)¹⁵ is indeed difficult to replace and without which, in the long-term, tourism is impoverished.

A part of this workforce left to go abroad or to other regions of economic prosperity in Croatia, some re-educated themselves, and others retired, either normally or early. So many losses would shake and destabilize in the long-term even significantly stronger economic regions with more diverse economic structures as compared to Dubrovnik, where tourism as the major activity, set the "pace" for the overall economy and for life in general, both directly and indirectly.

The devastations of war significantly changed and lowered the accommodation capacity in the Dubrovnik region. There still is no clear and reliable data on total accommodation supply, but the claims made can be supported based on the available data. Namely, the state of hotels and similar capacities, alongside the extensive damages, is quantitatively closer to that of pre-war times (Table 3).¹⁶

The remaining accommodation capacities (rooms in households and autocamps) are still further away from actual supply, already since the 1990's, but more due to their unpreparedness, especially following a six-year tourist pause, rather as a result of any physical damage (Table 4).

TABLE 3. Accommodation capacities in hotels and tourist settlements

Year	Rooms	Beds	1990.=100
1990.	9.313	22.288 ¹⁾	100
1996.	2.810	6.097	27,4
1997.	5.103	11.078	49,7

¹⁾ Additional beds included

Source: Analiza turističkog prometa na području općine dubrovnik in 1990 (1991.), TSO, Dubrovnik, 34.; Ured za statistiku ŽDN-e, Dolasci gostiju i noćenja u 1997. po mjesecima (1997.), obr. TU-11, 72.

15 Kobašić, A., Džubur, H., Lucijanović, L. (1996.), 100 godina suvremenog hotelijerstva u Dubrovniku, Turistička zajednica grada, Dubrovnik, 86.

16 In the Dubrovnik municipality towards the end of the 80-s, most tourist traffic occurred in hotels and in similar accommodation; in 1989, 61,0% all nights and 76,5% foreign tourist nights (calculated on the basis of data from Analize turističkog prometa ... 1989., o.c. 12., 22.)

TABLE 4. Beds in private accommodation and autocamps

Year	Private Accommodation			Autocamps		
	rooms	beds	1990.=100	sites	beds	1990.=100
1990.	7.649	17.268	100	6.540	15.350	100
1997.	3.192	7.204	41,7	820	1.925	12,5

Source: Calculated acc. to data noted in Table 4.

As shown in Table 3, in 1997, less than half of the accommodation capacities in hotels and tourist settlements were prepared for tourists, the basic form of accommodation for tourists in general, especially for those foreign.

Such a sizeable decrease in basic accommodation capacities stems from war destruction and damages, as well as from the wear-and-tear due to the lengthy accommodation of large numbers of displaced persons and refugees.¹⁷

Within the inner city region, which was not under direct occupation, 1 419 beds were destroyed, 1 462 were significantly damaged, 3 677 were damaged and 2 689 were damaged due to wear-and-tear.¹⁸

Hotels in other areas of the Dubrovnik region suffered enormous damages, such that the final count in war damages to hotels is frightening. Of 60 hotels (including the tourist settlement Vrtovi sunca) with over 22 000 beds, more than half were directly damaged. Of this, nine hotels with 3 800 beds (or 17,3%) were completely destroyed, 27 hotels with almost 10 000 beds available (43,9%) were more or less damaged, while 22,0% of total accommodation capacities were damaged due to wear and 12,3% were vandalized.¹⁹

Traffic and traffic networks are tourism's base, and it was here that war devastation was truly great. It is estimated that the direct damages to buildings, installations and traffic infrastructure surpassed 220 million DEM.²⁰

Considering that by the end of the 1980's, air traffic participated with over 2/3's in the arrival of foreign tourists, the extensive damages

17 In certain months in 1993, there were up to 6 000 displaced persons and refugees accommodated in hotels. In the beginning of 1996 in hotels, there were still more than 4 000, and in March 1997, in Hotel "Plakir" 625 and in Hotel "Epidauros" 427 (acc. to Kobašić, A. i dr. (1997.), 100 godina suvremenog ... , o.c., 90.; Ured za porogranike i izbjeglice, Regionalni ured Dubrovnik, izravno dobiven podatak za 1997.)

18 According to the sited monograph 100 godina suvremenog ... , 86.

19 Ibidem, l. c.

20 V.R.L.N. (1996.), Program obnove i razvoja Dubrovnika, Dubrovnik, 35.

suffered by the Dubrovnik airport, this important traffic center, and the occasional shelling all the way up to the end of 1995, made Dubrovnik inaccessible to the mainstream tourist market, or for this kind of transport, an area of high risk

Dubrovnik's tourist supply was markedly narrowed by the extensive devastation of the sea harbor in Dubrovnik, the main arrival and departure depot for all domestic and international sealane traffic. Key roads, both east and west, were targets of cannonfire, as well as electrical and telecommunication networks, the main Radio Television aerial station on Srđ and the tourist cablecar attraction "Srđ", which also contributed to impoverishing the substance, without which tourism would be impossible.

Neither were the natural resources nor locations used as a tourist supply - regions of exceptional natural values, historical monuments, cultural institutions, architectural heritages, all that which completely fulfills daily life and which makes a tourist destination interesting and attractive, spared from devastation.

From all that has been mentioned up to now, it can be concluded how aggression enormously damaged the tourism of Dubrovnik. However, alongside this, the great extent of indirect damages should also be emphasized, applied above all to the loss of the tourist market. Making a return to the tourist market following a long-term absence is an exceptionally difficult and demanding task. For this, it is necessary to have enough time, patience, skill and knowledge, but also the funds needed for recapturing the market, using systematic, diverse and long-term marketing instruments.²¹

3. STRUCTURAL CHANGES

The exclusion of Dubrovnik from the tourist market does not only have financial consequences. It reflects also on a different structure of visitors according to country of origin. From this, changes arise in foreign tourist demand. - for example, the kind of travel and accommodation, duration of stay, motives in travelling, travel organization, method of transport, accompaniment during travel, age, profession, time of travel, general demands, criteria, level of expenditure at the destination, structure and expenditure, but also supply in the areas of reception which are adapted to just this kind of demand, whether spontaneously or through programmes.

21 Cf. Vukonić, B. (1996.), Izravne i neizravne posljedice rata na razvoj hrvatskog turizma, Zbornik radova "Susreti na dragom kamenu", knjiga 20, Fakultet ekonomije i turizma "dr. Mijo Mirković", Pula, 180.

Foreign tourists were dominate in this region earlier on, so that in 1989 there was a drop of 60.8% in visits and 62.6% in nights for this segment. In 1991, the participation of tourists was significantly less in the already drastically reduced tourist traffic; represented by 45.3% visits and 51.2% accommodation, while in the comeback year of 1996, there were only 41.1% visits and 37.7% nights.²²

The reasons for such structural relationships are the very reasonable agency packages, subsidized air and sea traffic transport for domestic tourists, including foreign tour operators and individual tourists slow return of faith in the Dubrovnik region. However, in 1997, the comeback year of Dubrovnik to European and world tourist markets²³, foreign tourists have dominated once again. Their participation is shown by 60.2% for visits, and by 63.3% for nights, even though foreign tourist traffic in 1997 was only 1/8 of the same category in traffic for 1989, rather 13.6% in visits and 12.1% in nights.²⁴

In the 1980's, a significant positioning in the structure was traditionally taken by tourists from Germany and Great Britain, including other western European countries as well, alongside the high percentage of tourists from the then neighbouring republics. However, the major portion of tourist traffic (nights), about 50%, was "carried" by tourists from three countries (regions). Ten leading countries had 4/5 of overall nights (Table 5, Figure 3).

22 Cf. supra, tabl. 1. Among foreign tourists at the time included were (1989) foreign tourists (not including tourists from ex-Yugoslavia). If tourists from ex-Yugoslavia were to be included among foreign tourists, then foreign tourists would have a significantly higher participation in total tourist traffic; 91,6% in visits and 93,9% in nights.

23 The return of Dubrovnik to the world tourist market confirms the constant growth in tourists from the USA which in 1995 showed only 1 185 nights, but in 1996, 8 846, and in 1997 (I.-IX.) 12 208, which is still a modest result in comparison to 1989, when there were 143 021 nights for tourists from this country (acc. to data from Ureda za turizam ŽDN-e, Ureda za statistiku ŽDN-e -interna dokumentacija- i Analize turističkog prometa ... u 1989., o.c., 63.)

24 In this calculation of foreign tourists (1989.) included are all tourists outside of Croatia. For all of 1997, tourist traffic was estimated by the author based on data from January-September 1997.

TABLE 5. Foreign tourist nights in the municipality of Dubrovnik from ten leading countries

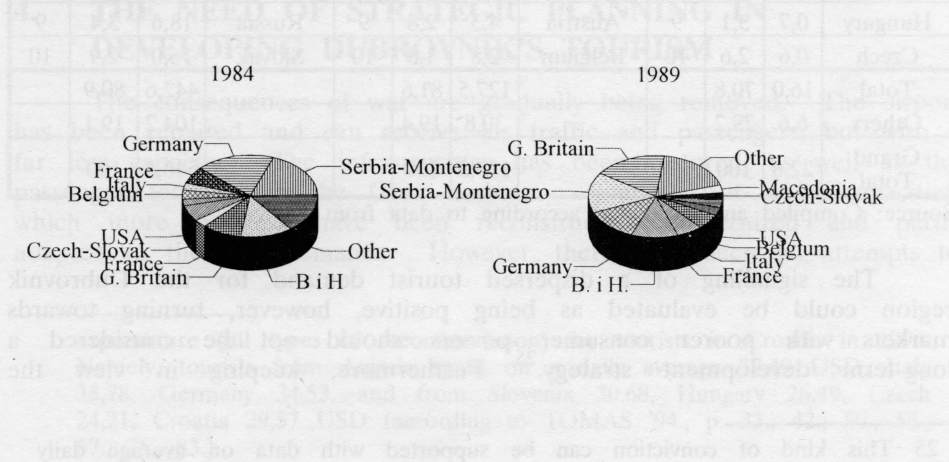
Country	1984.			Country	1987.			Country	1989.		
	nights (thousand)	%	rank		nights (thousand)	%	rank		nights (thousand)	%	rank
Serbia - Montenegro	937,8	19,0	11	Serbia - Montenegro	879,8	17,1	1	G. Britain	801,5	17,4	1
W.Germany	921,3	18,7	2	G. Britain	813,9	15,8	2	Serbia - Montenegro	727,2	15,8	2
Bosnia & Hercegovina	607,0	12,3	3	W.Germany	805,3	15,6	3	W.Germany	596,5	13,0	3
G. Britain	470,2	9,5	4	Bosnia & Hercegovina	548,0	10,7	4	Bosnia & Hercegovina	504,0	11,0	4
France	336,3	6,8	5	France	355,6	6,9	5	France	291,4	6,3	5
Czech	316,2	6,4	6	Czech	265,2	5,2	6	Italy	279,0	6,1	6
Belgium	172,9	3,5	7	Italy	222,7	4,3	7	Belgium	148,7	3,2	7
Netherlands	155,4	3,2	8	USA	151,1	2,9	8	USA	143,0	3,1	8
Italy	135,6	2,7	9	Austria	130,7	2,5	9	Macedonia	139,0	3,0	9
USA	124,2	2,5	10	Sweden	123,8	2,4	10	Czech-Slovak	122,5	2,7	10
Total	4176,9	84,6			4296,1	83,4			3752,8	81,6	
Other	761,7	15,4			8535,5	16,6			847,4	18,4	
Grand Total	4938,6	100			5149,6	100			4600,2	100	

Note: For comparison's sake with the 90-s, tourists from ex-Yugoslavia are included as foreign tourists.

Source: Compiled and calculated based on data from Analize turističkog prometa na području općine Dubrovnik u 1985.; 1987.; 1989. (1986.; 1988.; 1990.), TSO, Dubrovnik, 34.-5.; 34.-5.; 62.-3.

Figure 3.

Nights (%) of foreign tourists in the municipality of Dubrovnik in the 80s



Source: Compiled according to data from Table 5.

Such a high concentration of tourist traffic originating from a small number of countries cannot be evaluated as being positive, as this kind of orientation implies the possibility of higher risks in case of disruptions of any sort in these regions or countries.

However, in the recuperating years of Dubrovnik's tourism (1996) or the comeback of Dubrovnik to foreign tourist markets (1997), changes in the structure of tourist traffic occurred, shown by the participation of tourists from Bosnia and Hercegovina, Slovenia, Czech, Slovak and Russian Republics by almost 50%, especially noticeable in 1997 (I - IX). Concentrations are somewhat less in the postwar years, as almost half the nights came from tourists in four leading countries, with 4/5 of the traffic occurring among the top ten (Table 6, Figure 4).

TABLE 6. Foreign tourists in the municipality of Dubrovnik from ten leading countries

Country	1995.			Country	1996.			Country	1997.(I.-IX.)		
	nights (thousand and)	%	rank		nights (thousand and)	%	rank		nights (thousand and)	%	rank
Bosnia & Hercegovina	5,5	24,3	1	Bosnia & Hercegovina	36,5	23,4	1	Slovenia	75,3	13,8	1
Germany	2,6	11,5	2	Slovenia	28,1	17,9	2	Bosnia & Hercegovina	75,2	13,6	2
G. Britain	1,3	5,8	3	Germany	12,0	7,0	3	Czech	68,2	12,5	3
Italy	1,2	5,3	4	Italy	11,7	7,5	4	Italy	53,4	9,8	4
USA	1,1	4,9	5	G. Britain	10,0	6,4	5	Germany	51,7	9,5	5
Slovenia	1,1	4,9	6	USA	8,6	5,5	6	Belgium	46,6	8,5	6
France	1,1	4,9	7	France	7,3	4,7	7	G. Britain	18,9	3,5	7
Austria	0,8	3,5	8	Czech	6,2	3,9	8	Austria	18,7	3,4	8
Hungary	0,7	3,1	9	Austria	4,3	2,8	9	Russia	18,6	3,4	9
Czech	0,6	2,6	10	Belgium	2,8	1,8	10	Slovak	16,0	2,9	10
Total	16,0	70,8			127,5	81,6			442,6	80,9	
Others	6,6	29,2			30,8	19,4			104,2	19,1	
Grand Total	22,6	100			158,3	100			546,8	100	

Source: Compiled and calculated according to data from Table 1.

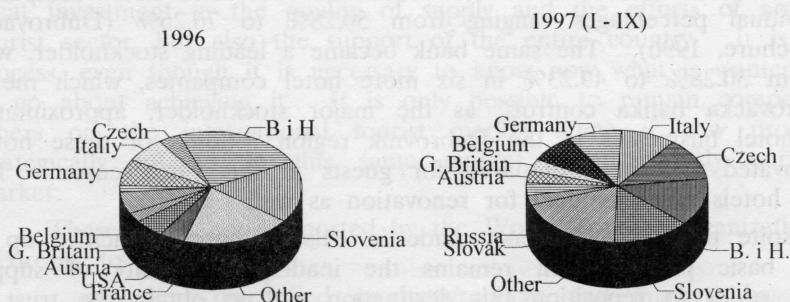
The signalling of a dispersed tourist demand for the Dubrovnik region could be evaluated as being positive, however, turning towards markets with poorer consumer powers should not be considered a long-term development strategy.²⁵ Furthermore, keeping in view the

²⁵ This kind of conviction can be supported with data on average daily

reputation that had been already achieved earlier on, Dubrovnik should in the future have a far more ambitious program. It is necessary to turn towards more demanding markets and to base prosperity on high quality and associated costs. Such a business and development policy would achieve greater economic benefits in tourism - an activity of exceptionally great importance to Dubrovnik.

Figure 4.

Nights (%) of foreign tourists in the municipality of Dubrovnik in the 90s



Source: Compiled acc. to data from Table 6.

Considering all that needs to be accomplished, the comeback of Dubrovnik once again to world, European and domestic tourist scenes in all its glory, but with an entirely different image, will neither be soon nor easy.

4. THE NEED OF STRATEGIC PLANNING IN DEVELOPING DUBROVNIK'S TOURISM

The consequences of war are gradually being removed. The airport has been repaired and can receive air traffic and passengers, but with a far less capacity. The infrastructure has been restored, as well as the passenger terminal in the Gruz harbour. Similarly for hotel capacities, which more or less have been reconstructed, modernized and partly adapted to the new demands. However, there have been no attempts to

expenditure (all types of accommodation) for tourists in Croatia in 1994. Namely, tourists from Austria spent on a daily average 37,49 USD, Italy 35,78, Germany 34,53, and from Slovenia 30,68, Hungary 26,49, Czech 24,21, Croatia 29,57 USD (according to TOMAS '94., p. 33., 42., 50., 58., 67., 75., 83.)

restore destroyed or devastated hotels, which continues to impoverish the tourist supply.

The procedure of owner transition in the tourist sector is near completion - small stockholders are lesser owners, and the remaining stockholders have become banks through changed revalorization in demand and the Croatian Privatization Fund. According to data obtained from the Regional Privatization Office, in Dubrovnik up to the end of 1996, only three hotels - "Petka", "Jadran" and "Villa Dubrovnik" underwent privatization. Three large companies: INA, Privredna banka d.d. and Dubrovačka banka d.d. became major stockholders in the hotels. Dubrovačka banka became the major stockholder in nine hotel companies with individual percentages ranging from 50.28% to 76.26% (Dubrovačka banka brochure, 1996). The same bank became a leading stockholder, with shares from 30.28% to 49.23% in six more hotel companies, which means that Dubrovačka banka controls, as the major stockholder, approximately half the hotel businesses in the Dubrovnik region. Some of these hotels were renovated and were prepared for guests in the 1997 season. The remaining hotels are scheduled for renovation as well.

In spite of the investments made in existing hotel capacities up to now, the basic problem still remains the inadequate quality of supply, needed in order to reposition this destination and to obtain the trust of western consumers. Namely, in the last six years, there was not only a drastic decrease in traffic and in revenues, but also such a drop in the quality of the tourist product, that with only smaller interventions, the tourist potentials cannot adapt to the contemporary demands of the market. Precisely because of this, and also due to the long absence from the international tourist market, a return to the traditional pre-war market will be a long-term process, which will depend primarily on the possibilities of improving the quality of tourist supply and the establishing of a modern, tourist marketing system.

This position is further complicated by ownership transition conditions, market and macroeconomic environments, as well as conditions ruling the international tourist market. Namely, great changes have occurred on the western market: the number of participants offering developed and quality supply has increased, consumers have become more demanding, seeking more experienced tourist packages, are well informed and are aware of the relation between cost and quality. Especially for more demanding market segments that seek eventful and active environments encompassing natural beauty, the attraction factor is no longer adequate.

Tourism has entered a period of:

- continuous growth in tourist traffic and consumerism,
- higher competition between destinations, regions/countries,
- greater attention paid to the influence of tourism on the economy, social-cultural development and the environment,

- better understanding the supply of tourist destinations, possibilities of travel, increased demands of the consumer in choosing the method of travel and the tourist product/service,
- technological development, especially computerized information and reservation systems.²⁶

Today, the question is not "where to spend a holiday", as standards in terms of accommodation, food and transport can be fulfilled, more or less, anywhere. The question is "how to spend a holiday", which implies a rich program of high quality in a specific destination.

Abandoning the concept used up to now of mass tourism requires great investment in the quality of supply and the efforts of not only the tourist sector, but also the support of the entire country. It is a lengthy process, even though it is necessary to know now what is wanted and how to go about achieving it. It is only possible to remain competitive with others on the international tourist market scene if new programs are strategically offered to this same market, simultaneously enriching the market.

These views are supported by the World Tourist Organization (WTO) according to whom:²⁷

- new and diversified products/services and markets based on the unique characteristics and resources of every country should be created,
- local communities should be included in planning and production - contrary to which there is no success,
- a cooperation should be developed between administration and operations so that each can understand the needs of the other,
- value should be created - to avoid financially burdening tourism too much and to control the growth of costs in those sectors where it can be avoided,
- environmental investments should be made - to control detrimental development and to identify and support those who offer their support and protection,
- amateurism should be eliminated - to strengthen human potential through professional education and improvement
- consciousness between the host-tourist should be improved - to increase mutual respect and to improve the experience and satisfaction of guests,

26 World Tourism Organization (1991.), *Tourism to the Year 2000: Qualitative Aspects Affecting Global Growth* (a discussion paper), Madrid, 32.

27 Borojević, G. (1995.): *Turistički trendovi u svijetu i u Europi s osvrtom na Hrvatsku, Turizam*, 43(11-12), 217.

- marketing and promotion should be strengthened and be more direct - this is especially applicable to improving the marketing skills of personnel employed in these disciplines, to an appropriate disbursement of budgets in order to achieve greater efficiency, to aiming at specific consumer groups through relevant marketing messages.

For this reason, the fundamental choice of this destination must be in improving the quality of the overall supply, which requires a thought-out concept of renovating and shaping the tourist product. In order to utilize the numerous potentials of this destination, it is absolutely necessary to plan development and to work out a strategic marketing plan. It is necessary to define strategic goals, to determine precisely how to direct supply towards which market segments in the long-term and to develop a contemporary tourist marketing system. This should be the basic task of those creating supply and tourist policies, so that changeable tourist demands can be met with continuously.

Even though numerous studies exist ("Gospodarska obnova Dubrovacke općine", 1992, "Gospodarsko stanje i mogućnosti razvitka Dubrovacko-Neretvanske županije", 1994, "Program obnove i razvoja Dubrovnika", 1996), not one offers a reliable solution as to how to achieve a market position and to which markets Dubrovnik should direct its long-term goals. Namely, a clear vision must exist and based on this, a clear strategy, in order to be successful on the market.²⁸

5. HOW TO POSITION DUBROVNIK ON THE INTERNATIONAL TOURIST MARKET

Today, when all European destinations emphasize their historical and cultural heritages all the more, it is logical to take advantage of the kind of potential Dubrovnik has to offer in tourist supply, as Dubrovnik has the possibility of achieving appropriate originality and variety with respect to competitive destinations, using its natural and culturally rare attractions. For this reason, reconstruction and development have to be based not only on the exceptional and for the most part, the preserved natural resources, but also on the architectural, cultural-historical and traditional heritages.

28 Today however, most firms in tourism are oriented towards short-term survival. According to data from the Institute of Tourism - Zagreb in Croatia in 1995, only 23% of surveyed hospitality companies had a strategic marketing plan as a formal document. This same problem is encountered in throughout almost the entire economy of Croatia (according to Cizmar, S. (1996.), *Strateško upravljanje ugostiteljskim poduzećem u Hrvatskoj*, Turizam, 44(5-6-), 121.

Dubrovnik is an urban environment of the highest value. In 1979, the old town center of Dubrovnik was placed in the UNESCO register of world cultural heritages. The importance of this fact is manifold, from the perspective of present and future economic, urbanistic, ecological and especially touristic valorizations, as cultural resources have great powers of attraction.

Namely, for each destination, particular products play major roles in attracting tourists and are more important than others, such as, for example, the carnival in Trinidad, Oktoberfest in Munich, Westminster Abbey and the Houses of Parliament in London, and so on.²⁹ These kinds of attractions are considered leading products of the destination and in promotion, they should be emphasized.

However, the exceptional possibilities that Dubrovnik has to offer in cultural supply, are not being used to full capacity. According to research (TOMAS '89 and TOMAS '94), the strong, comparative advantages of this destination are: nature, climate, picturesque beauty, services offered in accommodation buildings, as well as overall security. This means that either there is no adequate presentation of cultural heritage in the tourist supply of Dubrovnik or its lack of presentation on the foreign market.³⁰

This and other similar potentials have been used for a long time by other destinations. In this manner, for instance, already in the mid-80's, the "British Tourist Organization" used heritage (Heritage 84) in creating an image of the country.³¹ Namely, the presentation of one's own culture through tourism is an evermore frequent task of national tourist organizations in the world, as originality, variety and abundance of these kinds of cultural sites determines the strength of spontaneous tourist attractability and increases the overall value of the tourist supply in each country, everywhere.³²

Actually, the expression "heritage" in tourism does not only signify nature, history, architecture, cultural tradition, inheritance or legacy, that is, values which are handed down from one generation to the next, but that which can be clearly demonstrated in the promotion of a tourist product.³³

29 Heath, E., Wall, G. (1992.), *Marketing Tourism Destination*, John Wiley and Sons, London, 130.

30 TOMAS '89 (1989.), *Stavovi i potrošnja inozemnih turista u Hrvatskoj*, Institut za turizam Zagreb, Zagreb.

31 Middleton, W.T.C. (1989.), *Marketing Tourism and Travel*, Heinemann Professional Publishing, London, 223.

32 Alfier, d. (1994.), *Turističke funkcije kulture i kulturne funkcije turizma, u Turizam: izbor radova*, Institut za turizam Zagreb, 189.-99.

33 "Product" heritage is possible to divide into 23 types of attraction: natural historical attractions (zoos, water bird parks, waterfalls, caves, canyons, etc.), attractions tied to science (scientific museums, technology centers, "alternative" technological centers, etc.), primary production (agricultural

The use of cultural-historical personages, anniversaries of historical events and so on, as promotional aids, in order to create an image of a "product" is not only specific to western Europe. Such examples can be found in North America. Inheritance has become a commercial "product" offered to tourists who seek vacations and experience. Nature, cultural inheritance, and especially architecture are the tourist resources of Europe.

The major potentials in the tourist supply of Dubrovnik are also cultural and historical sights, the long-standing tradition of the "Dubrovnik Summer Festival" and other manifestations. According to the opinion of visitors (Institute of Tourism 1989), cultural monuments are an important element in the tourist supply of the Dubrovnik region, as:³⁴

- they are the source of satisfaction for almost all guests to this region,

- 30% of guests consider them an important reason for taking a vacation,

once a guest finds him/herself in this destination, there is a need to become acquainted, even if he/she came to this destination for entirely different motives, and even a third of the total number of guests who are in this destination, want to visit and to transform the experience into a cultural-educational one.

The following can also be added, alongside cultural resources, to the list of main potentials: nature, climate, sea, hotel accommodation and gastronomy. However, that which makes Dubrovnik distinguishable and different from other destinations, is its cultural heritage. For this reason,

museums, vineyards, quarries, etc.), artisan centers and workshops (hand-made products-sculptures, potters, carvers, glass-blowers, etc.), production of goods (porcelain factory, beer, applejuice, etc.), transport museums (civil aircraft, automobiles, ships, etc.), socio-cultural attractions (national costume museums, furniture, etc.), historical figures (painters, writers), art production (theater, open-air spectacles, circuses, etc.), rest parks (decorative gardens, arboretums, etc.), thematic parks ("historical" adventurous parks, fairytale parks for children, etc.), galleries (basically artistic), festivals and drama productions (festivals which relive the past, festivals "rural" activities, etc.), traditional sports (hunting, fishing), majestic old houses (palaces, aristocratic mansions, etc.), religious edifices (cathedrals, churches, monasteries, mosques, chapels, etc.), military attractions (prisons and war camps, war museums, battlefields, etc.), monuments to genocide (connected to the genocide of races or other mass murders), cities (that have a rich history), villages and farms (basically architecture from the past century), valuable natural resources (national parks), coastal resthomes (cities by the sea), regions (historical and geographically different from the country of origin) - according to Prentice, R., (1995.), *Tourism and Heritage Attractions*, Routledge, London, 39.-40.

34 Skupina autora (1989.), *Turizam i spomenici kulture na području općine Dubrovnik*, Institut za turizam Zagreb, Zagreb

the accent should be placed on this resource when promoting, as being the leading product for this destination.

Dubrovnik has the possibility of positioning itself as a city of European culture, as the pearl of the Adriatic, as an international congress center, basing its attractions on cultural identity and on the quality of ecological supply elements.

However, to achieve such a position requires further investment in the renovation of its cultural-historical heritage, reconstruction of existing accommodation capacities, as well as the construction of new capacities and a constant watch over the state of natural resources.

Taking into consideration that renovation of the cultural-historical heritage is already under way, special attention should be paid to the development of the remaining components of supply. The investments made up to now in reconstruction and in modernizing accommodation capacities is inadequate, considering the war destruction that this destination has suffered. Not one structure should be renovated using the previous kind of inertia. New programs and quality are imperative. Also necessary are new ways in thinking, in the manner of behaviour, in the form of acquiring knowledge and in the approach and organization of work. It is no longer possible to retain previous business philosophies. Enterprises need to be different and to perform differently now. Surrounding events should not be ignored, as knowledge of the environment at this moment in time, as well as defining our own personal role has become all the more significant, considering that enterprises are emerging as important factors in decision-making structures.³⁵

Care should be given in considering both the present and future needs of demand and the economic gains such structures might offer. Efforts should be directed towards developing the consciousness of the local population regarding necessary environmental conservation, as protecting the environment, which is now a weak point in supply, is the basic potential for future development.

In the long-term, the kind of potential groups aimed for in Dubrovnik are guests with special interests, guests who seek cultural experiences combined with a holiday. Various population groups fit into this category, of different socio-demographic backgrounds. They visit the various attractions as part of their holiday, with many of them seeking recreation as well. Enthusiasts or specialists, whose main motive in travelling is to get to know the heritage, do not make up the dominant market segment of tourists.

35 Borković, V. (1997.), Marketing for the Croatian Hospitality Industry in This Period of Transition, Proceedings Second International Conference on Enterprise in Transition, dAAAM International, Vienna and Faculty of Economics, Split, 603.-7.

For many of them, visiting heritage attractions are only part of daily activities. Most tourists combine such activities with others, such as, for example, shopping, visiting restaurants, beaches, and so forth. In this context, getting to know heritage attractions is considered as only part of the "shopping list" of those things to be done, in order of priority, dependent on activities already undertaken and on knowledge of the destination. For those indecisive tourists, visiting heritage attractions might be postponed if some other possibility arises for spending vacation time or might become a priority if such opportunities do not exist.

These tourists, with one exception (generally, they stem from enterprising and managerial families) demonstrate great socio-demographic differences, even though some age groups are rarer than others, ie. older age groups. Also, the family cannot be considered typical of these tourists. Younger individuals are predominant, though even among them there are differences depending on the kind of heritage they wish to get to know (for example, generally, families with children are attracted to cities).³⁶ Visiting and getting to know heritage attractions is characteristic of westerners - tourists from the USA, Canada, and is a dominant motive for Belgian and Swiss tourists. It is significant for the inhabitants of England, Scotland, Wales, and generally for European tourists, although this does not imply that all nationalities can equally be included in this kind of travel.³⁷

The tourist product in Dubrovnik can be directed as well towards some additional segments, such as: congress and meeting organizers, and business guests.

Dubrovnik must penetrate as much as possible the highly developed markets of Central and Western Europe (Germany, Great Britain, Italy, Austria), but must also position its product on overseas markets (USA, Canada, Japan).

This method of approach requires the selection of appropriate marketing strategies and action programmes for each specific market group, in order to ensure a good, long-term position and to change the manner of thinking regarding the needs of establishing tourist movements as in the past. The future of tourism in Dubrovnik can no longer be perceived from previous standpoints, as the changes undergone as a consequence of war destruction and the establishment of new market relationships,

36 According to the research of the European Union for education in tourism (surveying 6000 people in ten European countries) in the last ten years, especially among the youth, an interest has grown in touring cultural-historical monuments (every third "cultural tourist" between 20 and 29 years) - UT, *travanj* 1994., 47.

37 Prentice, R., o.c., 225.-28.

significantly influence the future development of tourism in the Dubrovnik region.

CONCLUSION

War and tourism are incompatible. Therefore, in the early 1990's, the region of Dubrovnik completely disappeared from both domestic and foreign tourist markets. In the horrors of war, fundamental buildings in the tourist supply were extensively devastated, as well as resources especially significant to tourism. The absence of tourist activities resulted in direct and indirect losses, and had an exceptionally negative effect on overall economic movement, which is usually powerfully influenced by tourism.

With conflicts brought to a halt and the release of surrounding political tension, Dubrovnik is making a comeback once more to the tourist market. Tourist traffic, an exceedingly important activity for Dubrovnik, indicated a return in 1996, and a significant growth in visitors and nights in 1997, even at only 1/6 of prewar traffic, confirming that the "drought" years are in the past. However, the initial results should not deceive anyone into thinking that everything will resolve itself on its own, as returning a lost market is a difficult, lengthy and complex process.

With the return of tourism to the Dubrovnik region, a change can be noticed in the structure of visitors according to residency, that is, the absence of tourists from traditional west European countries and the greater participation of countries from central and eastern Europe.

The analysis of tourism in Dubrovnik during prewar and postwar periods shows many weaknesses, concerning the quality of the tourist product, aboveall. These factors demand an entirely different approach in furthering development of all the segments used in tourism. For those deciding on tourist supply and tourist policies, the basic task regards the quality of the tourist product. In this respect, it is necessary to choose specific market groups and appropriate marketing strategies, in order to ensure long-term, successful positioning, with a stronger emphasis on historical and cultural heritages. The overall supply that Dubrovnik has to offer should not be the way it was before; it has to be richer, with more variety and originality, of greater quality, and easily recognizable. Dubrovnik must base its competitiveness on these characteristics of tourist supply.

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POVRATAK DUBROVNIKA NA TURISTIČKO TRŽIŠTE**Sažetak**

U radu se analizira gubitak turističkog tržišta kao posljedicu rata na dubrovačkom području početkom 90-ih. Ukazuje se na ogromne ratne štete, koje su strahovito oslabile temelje turističke djelatnosti, i velike izravne i neizravne financijske i druge gubitke, što proistječu iz višegodišnjeg izbivanja Dubrovnika s turističkog tržišta i isključivanja ove nekada veoma popularne destinacije iz intenzivnijih turističkih tijekova. Posebno se razmatraju strukturne promjene inozemne turističke potražnje, u godinama oporavka, odnosno povratka Dubrovnika na turističko tržište, prema obilježju domicila turista koji dolaze na dubrovačko područje, s naznakom mogućih učinaka takvih promjena.

Analizom postojećeg stanja dolazi se do spoznaja da je, unatoč teškim postojećim prilikama, nužan bitno drukčiji pristup turizmu. To znači kako treba definirati dugoročne strateške ciljeve, točno odrediti prema kojim se tržišnim segmentima želi usmjeravati ponuda, razvijati sustav suvremenog turističkog marketinga. Budući da je ključni problem povratak Dubrovnika na tradicionalna i zahtjevnija ranija tržišta, turistički proizvod mora biti kvalitetniji, raznovrsniji, originalniji, naglašenije temeljen na povijesnom i kulturnom naslijeđu, a marketinška politika usmjerena prema ciljnim tržišnim segmentima. U radu se ističe kako Dubrovnik ima mogućnosti dostići originalnost i različitost u odnosu na konkurentske destinacije.

Ključne riječi: turističko tržište, rat, gubici, turistički proizvod, sustavni marketing, strateški ciljevi, pozicioniranje.