

CROATIAN TOURISM AND ESTIMATES OF ITS ECONOMIC IMPACTS

Abstract:

This article looks at the importance of tourism for the overall Croatian economy and the attempts at estimating its economic impacts. All of the available data are the result of individual institutional and personal estimates, based on insufficient statistical data and research. Unfortunately, this also refers to the development of Tourism Satellite Account, as well as to official data provided by the Ministry of the Sea, Tourism, Transport and Development, which has changed several sources and bases of estimates, for the past six year, without any explanation, hence bringing into question the reliability and questionable quality of their use, but also the credibility and consistency of managing the tourism policy on such a basis.

Key words: *Croatian tourism, economic impacts, Tourism Satellite Account, tourism revenues*

We can assert that the question of economic impacts of tourism in Croatia has been a frequent and a prevailing one for a long time, and that we are still not prepared to give an economically credible answer to it. This certainly does not imply that such answer is not possible, but it emphasises the fact that it has been reduced to the level of institutional and personal estimates and evaluations while not being founded on economically verified and reliable facts and data. It might seem exaggerated to some, but actually the mentioned issue has already assumed a feature of a proverbial, scholastic question on the number of teeth in a horse's mouth. At the time this question was asked, which was in the Middle Ages, a scientific answer, which at that time meant a philosophic one, was on the level of fruitless reasoning about an almost insolvable problem, even though, a simple and indirect answer was possible – they should have opened the mouth of the first horse and count its teeth. But taking into consideration the world view of that period and the philosophical thinking separated from life and practice, this had not been done.

When it comes to tourism and its economic impacts, it seems as if we are all captured in this mentioned scholastic trap. We are convinced that they are, generally speaking, great and significant, but we do not know how, and we can not exactly assume how great they are, in which way they occur, i.e., how it is possible to quantify them and express them in figures. By this we certainly do not mean standard statistic and other data on tourism, which nowadays in Croatia are used to describe it but they do not explain its economic essence.

In other words, its physical indicators, which do not exceed the scope of simplest figures, numbers and their different relations, are the only thing that is being observed in Croatian tourism and its accomplishments on the macro level. We regularly add to these indicators, the indicators of direct and indirect employment rate, realised average expenditure and foreign currency inflow, which are also the subject of estimate, but they are not methodologically unique bases and exact figures that certain institutions and individuals offer to the public. In other words, it means that tourism in our country is still being observed and evaluated, almost exclusively by physical indicators of realised number of tourist and overnight stays and therefore

it is comprehensible that its development objectives are set in the same way. Up to 2006, this was an increase of the number of tourists and overnight stays to the levels that had already been realised in the years prior to the War of Independence. In that case, we can only speak of the same numbers and other physical indicators but with substantially different contents and different effects considering significantly different political, social and, of course, economic conditions of the post-war reconstruction and development.

However, along with the mentioned assertion, we need to ask the most important question regarding the kind of impacts we are talking about, who bears them, how they are felt, what they are the consequence of and what they incite or cause. Unfortunately, our overall knowledge of the impacts was and still is insufficient, and it does not exceed the level of individual, basically haphazard evaluation of large and numerous impacts that justify all that has been invested in tourism and all that is, or at least it seems as such to some, inseparable from it, including all of its, direct and indirect, harmful physical, transport, economic, environmental, social and other impacts and consequences. The basis for such thinking and attitudes is in the utterly simplified and reduced development and economic matrix, according to which, a larger, and hopefully ever-increasing number of tourists and overnight stays should automatically imply larger and more significant economic impacts, which should naturally be only positive.

Another reason for such state is certainly the absence of a coherent and systematic statistical monitoring and analyses of tourism and its impacts, especially economic ones as the fundamental basis for the orientation and conduction of its development.

But while we are not doing it, others are, and therefore it can be affirmed that our general knowledge of tourism and its impacts is based on analyses, estimates and evaluations of the impacts of tourism, i.e., tourist industry, not only in other tourist countries, but, even more emphatically, on analyses and evaluations of its importance and value within overall European and world economy. They are truly impressive and it is needless to mention relevant data and facts, but at the same time, taking into consideration current economic structure, the level of development and a whole array of particularities, they are difficult to apply or they are even inapplicable for us. When speaking of Croatian tourism, its economic significance and value, this fact is frequently forgotten or its significance is unjustifiably decreased.

First and foremost, the above mentioned refers to the procedures of assessment and evaluation of economic impacts of tourism, i.e., tourist industry, done by WTO and WTTC and the attempt of their indiscriminating implementation for the purpose of the determination of economic impacts of Croatian tourism. This primarily refers to Tourism Satellite Account, a specially developed and applied methodological framework for estimating the impacts of tourism in a certain area. But, regardless of its theoretical and practical applicability and the authenticity of obtained results, i.e., estimates, indisputable is the fact that for the purpose of developing Tourism Satellite Account, first of all, it is necessary to conduct the revision of current statistical and documental monitoring of tourism, i.e., tourist industry, and its customization and adjustment with its congenial, and nowadays standardised procedures adopted by all

of the most important tourist countries, as well as European and world subjects and institutions in tourism.

For Croatia, a country where tourism plays an important role in creating the conditions of its overall economy and its development, facts and figures of its total economic impacts are, i.e., should be, of great importance and value. Furthermore, we can assert with certainty that the reasons of the aforesaid need to exceed the framework of the affirmation of tourism and its economic value and that they can be found at the core of managing the broadest economic policy, as tourism, i.e., the overall tourist industry, represents its absolutely the most outstanding and significant segment. It is the trade mark of Croatian economy. Certainly not the only one, but it is the trade mark that incorporates the largest number of economic activities and their fields. Unfortunately, the aforesaid should in no way be comprehended and it can not be comprehended as some kind of special economic advantage or fortune, but as a fact that Croatia simply has not got any other similar integrating basis for development. In other words, in production-wise, i.e., industrially weak Croatian economy, tourism is not a manifestation of economic and development fortune, but a manifestation of objective givenness and reality. This has to be comprehended and accepted, and conditions for the best possible utilization of its overall economic and development opportunities and advantages it has over all other economic activities and fields should be created while simultaneously reducing all of its unwanted and negative impacts on the overall resource basis, which it is founded on, to the lowest possible level.

In order to achieve this, it is necessary to get to know it and monitor it on the basis of on-going statistical and array of other research, specially adapted to demands of the mentioned methodological procedure of Tourism Satellite Account development, used as the means of constant and continuous research and assessment. If there is no such basis, every attempt at its "one-time" development remains at a nonbinding model level that can enable reaching, not only a real, but also desired and predetermined result.

Unfortunately, this was how Tourism Satellite Account of Croatian tourism was produced, and how its result contributed to creating a new confusion and a lack of understanding of both the need and purpose of its development, as well as a questionable quality or any kind of practical utility of obtained results that we are going to discuss later on in the article.

We should mention the fact that, prior to developing of Tourism Satellite Account and the publication of its results, there were estimates of realised tourism revenues made on other bases. Those calculations and estimates were made by the Croatian National Bank and its data are still used as the only official source.

All of the afore-said would perhaps not need any special analysis and evaluation, if some hard to explain and accept changes and relations did not occur in calculated amounts and estimates.

This is not a matter of subjective attitude and evaluation. Not only certain individual haphazard evaluations and estimates but also official documents and statistics are an indisputable proof of that. One of them is an official statistical publication called

“*Croatian Tourism in Figures*”¹⁾ published by the Ministry of the Sea, Tourism, Transport and Development. Nowadays, it can be evaluated as an expression of a long-term tradition, wish and need to form and regularly publish a special publication that would enable the presentation of condition, structure and all other significant features of Croatian tourism, their trends and changes and, exceptionally important, its overall economic impacts.

The mentioned needs and desires are unquestionably based on the fact that tourism, defined as “a synthetic or hybrid economic sector” of different, directly or indirectly tourism-related economic activities is absolutely most important part for overall Croatian economy. Unfortunately, the mentioned publication, or any other statistical or similar publications and studies have not been able to show it or prove it.

For the past several years “*Croatian Tourism in Figures*” has been changing its appearance, but its contents has practically remained, not only unchanged, but even impoverished, devalued and completely futile, notwithstanding the intention of showing “new” relevant data.

Actually, things that have been “changed” and “supplemented” refer solely to classification and interpretation according to different features, the so-called basic indicators of tourism development, such as indicators of accommodation capacities, the number and structure of tourists and realised overnight stays. As all of these data and indicators represent the official data of the Central Bureau of Statistics of the Republic of Croatia, the only value the mentioned publication has, is in the fact that data and indicators are comprehensively and individually presented in a more accessible and practical way than they are presented in the Statistical Yearbook of the Central Bureau of Statistics. But, with some misprints, some of the presented data and the way they were summarized and interpreted call for special attention and explanations, and that should be the subject of a special analysis.

In the context of the contents of this review, the fact that, in issues for 2003 and 2004 of the mentioned publication there was no presentation or any other interpretation of official impacts of tourism that were mentioned in the Statistical Yearbook of the Croatian Bureau of Statistics of the Republic of Croatia, and which were used up to 2004 and then from 2004 (!?) onwards certainly deserves the greatest attention. Based on that fact, many questions are arising. Perhaps only the publisher – the Ministry, of the Sea, Tourism, Transport and Development, i.e., people responsible for the publication, have clear and unambiguous answers. For now, they have remained unanswered to its users, same as the reasons, appropriateness, well-foundedness, justification and permissibility to include data collected by foreign institutions (WTTC –World Travel and Tourism Council and OEF – Oxford Economic Forecasting) in the official document of the Ministry, the most responsible state institution for tourism, without any explanation of the otherwise completely misunderstood and misinterpreted source “Croatia – the Impact of Travel and Tourism on Jobs and the Economy”.²⁾

Therefore, this was an attempt to make as “precise” as possible estimates of financial and other economic impacts of tourism and its structural positioning in the framework of overall Croatian economy. In order to achieve this, it is necessary to have very

abundant, well structured and heterogeneous statistical and other documentation and sources at one's disposal. When they do not exist, when they are insufficient or maladjusted to the mentioned requirement, then the first and unavoidable step in any kind of structural, quantitative, monetary or any other similar evaluation and analysis of tourism in the framework of an overall economic structure of a country, is its substantial economic determination, systematic preparation and long-term adjustment to all significant economic changes. All of the countries that take tourism seriously and that started developing Tourism Satellite Account as the basis of a consistent and long-term management and positioning of tourism in their generally well-structured economies, acted in that way. In fact, in almost all of these countries, available statistical and other sources proved to be insufficient and, as a rule, directly inapplicable. Finally, this fact is a starting point for the official methodology of developing of Tourism Satellite Account ("Tourism Satellite Account: Recommended Methodological Framework", Statistical Commission of the United Nations, March 2000³⁾ and „European Implementation Manual on Tourism Satellite Accounts“, EUROSTAT⁴⁾. In these documents the first sentence literally says: "The development of a Tourism Satellite Account will allow tourism to be accurately measured and compared with other economic sectors. The results of TSA will provide for better understanding of the share size and value of the tourism industry, **based on hard figures that are internationally comparable and whose reliability is high since they are based on the quality statistics produced by the official national statistical systems**"⁵⁾ or „Countries now need robust information and indicators to enhance the credibility of the measurements concerning the economic importance of tourism. These should have the following characteristics:

- They should be **statistical in character and be produced on a regular basis**, that is, not only as a one-time estimations, but **as on-going statistical processes**, combining the compilation of benchmark estimations with more flexible uses of indicators to enhance the usefulness of the results;
- Estimates must be **based on reliable statistical sources**, where visitors and producers of services are both observed, possibly using independent procedures;
- Data should be **comparable** over time within the same country, comparable among countries, and comparable with other fields of economic activities;
- Data should be internally **consistent** and presented within macroeconomic frameworks **recognized** at the international level.⁶⁾

To put it simply, all of the above mentioned is the confirmation of the fact that reliable, consistent, recognisable and on-going statistical data are required for each analyses of economic activity, the evaluation of its condition or possible development. Of course, this is the basic prerequisite for the development of Tourism Satellite Account primarily conceived as a possible methodological framework for the positioning and evaluation of tourism as one of the segments of economic structure of a country. When the mentioned statistical and other documentation basis does not exist or is insufficient, then conducted analysis and evaluations can not have, or in the best case, have only got certain methodological and model value.

The fact that we have approached the development of Tourism Satellite Account in spite of the nonexistence of required statistical and other documentation bases and that, so far, nothing has been done about changing the state, i.e., starting the preparation and adjustment of statistical and other bases for its development, indicates the level of knowledge of those who, not only ordered and paid for its development, but uncritically started to use the obtained results as exact figures and values and realistic indicators of economic importance and value of tourism. They are also currently using them as a reliable prognostic framework according to which overall impacts of tourism, expressed by the amount of the realised revenues by year 2013 should achieve a projected figure of \$20.2 billion.⁷⁾

It has already been said that required statistical and other sources required for the elaboration of Tourism Satellite Account were insufficient and inappropriate, especially regarding their content basis, scope and time period, and therefore the Developers, WTTC and OER were forced to approach various assumptions and estimates, as well as a disputable use of various sources from other countries. The clearest indication of their number and scope can be found in the fact that the results of developed Tourism Satellite Account are basically the result of econometric models with more than 200 variables from which only 30 are considered important. Therefore, it is obvious that, with their individual, smaller or larger changes and relations, one can reach different, even realistically possible and desirable results, which unfortunately can not be verified in any way without knowing all input figures and relations and their reliability. In the economic sense, the result on “direct and indirect contribution of the tourism and travel sector to the overall economy of 20.8%”⁸⁾ or for example of 19.0% or 23.0%, as a result of slightly changed inputs could also be evaluated as “realistically possible”, acceptable or significant. Several questions are arising regarding this issue. One refers to a “false” dilemma of whether tourism is especially important and valuable part of our overall economy, and the other one, whether anything would significantly change or happen if, for example, we got the result of the mentioned contribution of 30% or even 35%.

An unreserved answer to the first question could only be affirmative, regardless of frequently seemingly different opinions and attitudes on the absolute value of its economic and social contributions with respect to the whole array of generally numerous, direct and indirect economic and social expenses.

The second question could also get an unreserved answer. Actually, nothing would significantly change or happen if the share of tourism in the gross domestic product was assessed at 30%, 35% or more, without real determination of tourism or tourist industry as the basis and determinant of the overall Croatian economic development.

All of the above mentioned unambiguously shows that without having reliable statistical data and other indicators and their triangulations, i.e., observations and evaluations from different perspectives and points of view, and an economic policy based on them, analyses and evaluations of the importance and value of tourism remain on the level of free and uncommitted estimates or on the level of certain “methodological” considerations and relevant model figures and relations that can even enable the determination of desired results in advance.

To prove so, we have an illustrative example of the determination of one of the key items in the produced Tourism Satellite Account. It is a so-called "Travel and Tourism Time Ratio" (TTR) that was used as a general factor for determining household expenditure on certain tourism characteristic products (for example, clothes) and it is the "result" of assumed ratio of time used for "tourist activities" and total available time per year. In this particular case, this factor (TTR) was determined by putting number 32 (statutory guaranteed number of holidays and public holidays – with a note from the author that this number for the United States is 22) in relation to 365, which is the number of days in one year. Calculated in that way, TTR is 8.8%. The same factor for the assumed, far more extensive expenditure of households in restaurants and for sporting activities, based on the estimated size of total annual holidays of each member of household, is 19%. Household expenses for road transport (the cost of buying a car, petrol and insurance) were estimated by factor 25%.

There is no need to specially comment on the number of assumptions and the kind of assumptions that are made, and how they can be elaborated and justified without necessary research and data. Their "foundation" is so weak that, practically without an error, they can be changed, varied and "modelled" according to some result that was determined beforehand or is desired.

Serious tourism and economic policy can not be carried out on the mentioned basis. Furthermore, mentioned assumptions and their reliability, in the framework of the country's economic policy can call into question the seriousness of demands made by "the tourism sector" in relation to other economic activities and their development needs.

Unfortunately, feasible and well-founded arguments and indicators of the significance and value of tourism for Croatian economy were not gained by this kind of approach, but the whole array of questions, ranging from professional to elementary have been raised, and so far they remain unanswered. A lot of things that refer to tourism, including, of course, its overall economic impacts have remained on the level of ad hoc estimates and evaluations. They are changing; their sources and basis are changing, so that absolutely nothing is sure except the fact that tourism, and activities that are directly or indirectly related to it, make an irreplaceable part of our overall economic base. Nobody calls this into question, but at the same time, nobody is capable of showing and proving this by using well-founded figures and quantities.

If nothing has been done on the development of Tourism Satellite Account of Croatian tourism so far, it can be expected that a similar attempt will not be made.

The Ministry of the Sea, Tourism, Transport and Development should and could get its "tourism" affirmation, frequently disputed by the professional and general public, on the well-founded and argued positioning of tourism in the current and projected future economic structure, primarily by gradual and long-term creation of reliable statistical and other indicators and robust information and indicators of increasing credibility of its pronounced economic significance and value. That is definitely not only the most important task of the Ministry, but also, it is its possibly the greatest strength, being the most responsible state institution for tourism and,

intermediarily, for all economic and other activities that are directly or indirectly related to tourism.

But the way this institution started the process does not give much hope for some prudent and well-founded development. The quoted publications of the Ministry of the Sea, Tourism, Transport and Development – *Tourism in Figures*, the ways economic impacts of tourism are presented, i.e., the estimates of the amount of total realised revenues from tourism (*Table*) as a sole expression of its importance, value and efficiency are the proof of such opinion. First of all, the figures provided by the Croatian National Bank were substituted by the figures, i.e., estimates of the developed Tourism Satellite Account. This was also abandoned without any explanation given and figures were again substituted by those provided by the Central Bureau of Statistics of the Republic of Croatia, and finally they came back to using figures provided by the Croatian National Bank. This all led to having different results for the same year, which were difficult to compare and what is the most important, it led to utterly unreliable estimates. There is also no answer to whether Tourism Satellite Account, whose data were used as official data up to year 2003, is abandoned, or maybe it is a matter of general confusion and misunderstanding of the results and their basis and their irresponsible use on the level of daily policy estimates and evaluations. On such a basis the consistent and long-term tourism development, which means the overall economic policy, simply cannot be considered and carried out.

Realised revenues from tourism

in million EUR (USD)

Year (1)	Croatian National Bank (2) (3)		Ministry of the Sea, Tourism, Transport and Development (4) (5)	
2000	3.011,8	(2.758,0)	(2.758,0) ²	/3.011,8/
2001	3.749,3	(3.335,0)	(3.335,0) ² (3.439,0) ³	/3.749,3/ /3.866,2/
2002	3.960,8	(3.811,4)	(3.951,3) ⁴	/ 4.106,2/
2003	5.572,7	(6.310,5)	5.686,5 ⁵	/ 5.686,5/
2004	5.505,6	(6.727,7)	5.505,6 ⁶	/ 5.505,6/
2005	5.998,9	(7.370,1)	5.918,9 – estimates	/ 5.918,9/
2006 ¹	6.293,3	(7.990,1)	- ⁷	

- 1) Preliminary figure
- 2) Croatian Tourism in Figures 2001, MMTPR, 2002 (Croatian National Bank is the source of figures)
- 3) Croatian Tourism in Figures 2002, MMTPR, 2003 (the source: WTTC and OEF)
- 4) Croatian Tourism in Figures 2003, MMTPR, 2004 (the source: WTTC and OEF)
- 5) Croatian Tourism in Figures 2004, MMTPR, 2005 (the source: The Central bureau of Statistics)
- 6) Croatian Tourism in Figures 2005, MMTPR, 2006 (the source: Croatian National Bank)
- 7) Croatian Tourism in Figures 2006, MMTPR, 2007 (in print)

Unfortunately, the same question arises in the case of data provided by the Croatian National Bank, which are the only official data. Some hard to explain changes and relations occurred in these figures, in the observed period of time. But let's put first

things first. In Column 5, the figures of Column 4 were shown – realised revenues expressed in millions of EUR – accordingly with the procedure of the Croatian National Bank, and therefore it makes it possible for a direct comparison of figures in Column 2 and Column 4. Prevailing differences, which are not specifically large, refer to the fact that the Ministry of the Sea, Tourism, Transport and Development is inconsistently and uncritically using different sources, even though the only official ones are of the Croatian National Bank. The reason for abandoning further publication of estimates of the produced Tourism Satellite Account is probably in the fact that its results are unacceptable and inapplicable. As there were some significant changes in the evaluated figures of realised revenues from tourism done by the Croatian National Bank (especially emphasised in the evaluation of revenues for 2003 in comparison to 2002), it is realistic to assume that some of the elements of Tourism Satellite Account had an impact on changing of the earlier Bank's methodology for tourism revenue calculation. This has never been officially published and explained, but that is the only way to explain the figures of estimated tourism revenues in 2003. Actually, we are talking about a hard-to-explain increase in tourism revenues in 2003 for 1.611 million EUR or by 40.6% in comparison to 2002. In that tourism year nothing significantly new happened. There was the total of 8,878,000 tourists (7,409,000 foreign tourist and 1,469,000 domestic tourists) or 6.7% more, and there were 46,635,000 overnight stays (41,323,000 foreign and 5,312,000 domestic) or 4.3% more than in 2002 and an average daily tourist expenditure that was about 40 EUR, also did not change. Therefore, the only possible reason for the increase of the estimated amount of tourism revenues is the change of the way, i.e., methodology of its calculation (off the record, it is still called "an experimental" methodology).

In the Table, there are only those figures, which are to a certain extent, comparable to data provided by The Croatian National Bank and from the publication of the Ministry of the Sea, Tourism, Transport and Development, which refer to the estimates of Tourism Satellite Account. Nevertheless, other figures, such as "total tourism expenditure" (the total amount of all kinds of domestic and foreign tourism expenditures) that was estimated at 4,933,100 USD for 2001, i.e., 5,545,900 EUR, and at 5,881,000 USD or 6,111,600 EUR for 2002, were mentioned in Tourism Satellite Account and in the publications of the Ministry. Especially important and underlined element of Tourism Satellite Account is the estimate of overall economic impacts of tourism, that were estimated at 5,974,400 USD or 6,716,600 EUR for 2001, and at 6,987,500 USD or 7,261,900 EUR for 2002. At the same time tourism share in GDP of 20.8% and tourism growth and its impacts until 2013, estimated at the amount of 20.2 billion USD or, according to present ratio, at about 16.0 billion EUR, were predicted using the mentioned figures.

If we use the mentioned figures in order to try calculating the amount of average tourist expenditure, then we can get very different figures that are at least twice, and more often, three times higher than the amount of average expenditure of 42 EUR in 2004 that was reached by nowadays standardised and regular research done by the Institute for Tourism from Zagreb that has been conducted since 1986.⁹⁾

If we integrate the so called informal economy that can be estimated at 25% to 30% of "regular size" of Croatian tourism, whose economic impacts can not be integrated even in a model structure of Tourism Satellite Account, with all of the mentioned

calculations and share sizes we will arrive at absurd situation which is, that overall tourism impacts per capita in Croatia are, on average, equal or even higher than equivalent tourism impacts in the Republic of Austria.

The development of well-founded economic analyses and the estimates of direct and indirect impacts of tourism are certainly not simple, but the demonstrated approach and attitude towards that problem in our country can be assessed as trifling, disparaging and even unproficient. To a large extent, it brings into question the validity and credibility of all data that have been used and published, which means all of the evaluations, plans and overall policy of tourism development that has been founded on them.

The mentioned bases, approaches, concepts and thinking will keep all of us in the scholastic trap of speculation and equivocation from the beginning of this review, but it is probably the best no to make any kind of estimates until a decision is made to pay necessary attention to the mentioned issues and to start using the available knowledge on the constant and long-term basis. Nowadays, without such a basis it is illusorily to talk about and think about tourism as the basis of Croatian economic development and the ways of its long-term development and use.

It all puts a lot of responsibility on the profession, but it primarily refers to the institutions and people in charge and directly or indirectly responsible for tourism in all of its economic and development dimensions, and which are still, to a large extent on the level of general and declaratory attitudes, thinking and acting.

Literature:

- 1) *Croatian Tourism in Figures 2003, 2004, 2005, 2006*, The Ministry of the Sea, tourism, Transport and Development
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- 3) *Tourism Satellite Account: Recommended Methodological Framework*, Statistical Commission of the United Nations, New York, 2000
- 4) *European Implementation Manual on Tourism Satellite Accounts* (TSA), EUROSTAT, Unit D5
- 5) The same, page 6
- 6) *Tourism Satellite Account: Recommended Methodological Framework*, page 1
- 7) *Croatia – The Impact of Travel & Tourism on Jobs and Economy*
- 8) *Croatian Tourism in Figures 2004*
- 9) *TOMAS – Attitudes and Tourist Expenditure in Croatia*, Institute for Tourism, Zagreb, 2005.