

Tourism of Croatia - Position and Perspectives

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Croatia bases its tourism development upon abundance of natural and historic-cultural resources and nearness of the emittive markets. It more intensively joined the international tourist movements in the middle of the 1960s having become a medium-developed tourist country of the European Mediterranean. A decrease of the tourist flow which had begun in the second half of the 1980s, culminated during the armed aggression on Croatia. The losses of the tourist flow during the eight war and post-war years have been estimated to 325 million of the lost overnight stays, respectively to 13 milliard US\$. In order to increase the tourist flow it is necessary to raise the quality of the tourism offer and to coordinate it with the leading trends in the world. Due to the process of transition from the planned to the market economy, there is a revision of the existing law regulations in Croatia. A new cycle of the Croatia tourism has been started in this way. It is based on raising of the quality and enrichment of the tourism offer other than board and lodging.

Key Words: tourism, war damage in tourism, tourism product, Croatia.

Turizam Hrvatske - stanje i perspektive

Hrvatska temelji svoj turistički razvoj na izdašnosti prirodnih i povijesno-kulturnih resursa te blizini emitivnih tržišta. Intenzivnije se uključila u međunarodna turistička kretanja sredinom 1960-ih godina postavši srednje razvijena turistička zemlja europskog Sredozemlja. Pad turističkog prometa započeo u drugoj polovici 1980-ih godina kulminirao je u vrijeme vojne agresije na Hrvatsku. Gubici turističkog prometa tijekom osam ratnih i poratnih godina procjenjuju se na 325 mln. neostvarenih noćenja, odnosno na 13 mld USD. Da bi se povećao turistički promet potrebno je podizati kvalitetu turističke ponude i usklađivati je s vladajućim trendovima u svijetu. Prelaskom s planskog na tržišno gospodarstvo u tijeku je revizija zakonske regulative čime je pokrenut novi ciklus razvoja hrvatskog turizma temeljenog na podizanju kvalitete i obogaćivanja izvanpansionske ponude.

Ključne riječi: turizam, ratne štete u turizmu, turistički proizvod, Hrvatska.

INTRODUCTION

Only after becoming independent Croatia appears as a selfreliant subject on the international tourism market. Its renewed break into the world market is especially difficult because of the damages caused by the war, impoverishment of the tourism offer, transition from the planned to the market economy, and because of the permanently rising international competition. In order to make Croatia competitive to the neighbouring Mediterranean countries again, it is necessary to review the former tourism development and harmonize it with the actual trends on the international tourism market, to modernize and enrich the tourism offer of the country, and reconstruct the tourism sector according to the principles of the market economy.

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DEVELOPMENT AND RECENT POSITION OF THE CROATIAN TOURISM

Croatia is an attractive tourist country. Its tourism development, is based on abundance of natural and historic-cultural resources and nearness of the emittive markets. The tourism resources survey shows that the majority of the high-grade tourist area and attractions are located on the Adriatic littoral. Besides the biotopic power and attractiveness of the sea, the littoral is the region where about half (48 %) of the protected natural sites and the greater part of the monumental heritage (60 %) as well as the most of the tourist destinations (86 %) are situated. With regard to the quoted resources the Southern Croatian Littoral, i. e. Dalmatia, is naturally and culturally the most attractive region in which the greater part of the tourist attractions and more than a half of the tourist resorts are concentrated. The Northern Croatian Littoral represents another attractive tourism region of Croatia with somewhat smaller number of the protected natural sites and cultural monuments. Its comparative advantages in relation to Dalmatia are based on the climatic and landscape peculiarities and on easier traffic accessibility. The continental part of Croatia, although with specific attractions, has not been so far touristically valorized, because the majority of the tourism demand is still oriented toward the maritime area. So, Upland Croatia is characterized by greater representation of the natural resources (national park, park forest and natural monuments), while Central and Eastern Croatia are characterized by the anthropogenic attractions such as the castles with the horticultural and single monuments and special natural reservations of the moorish and flood regions (Tab. 1)

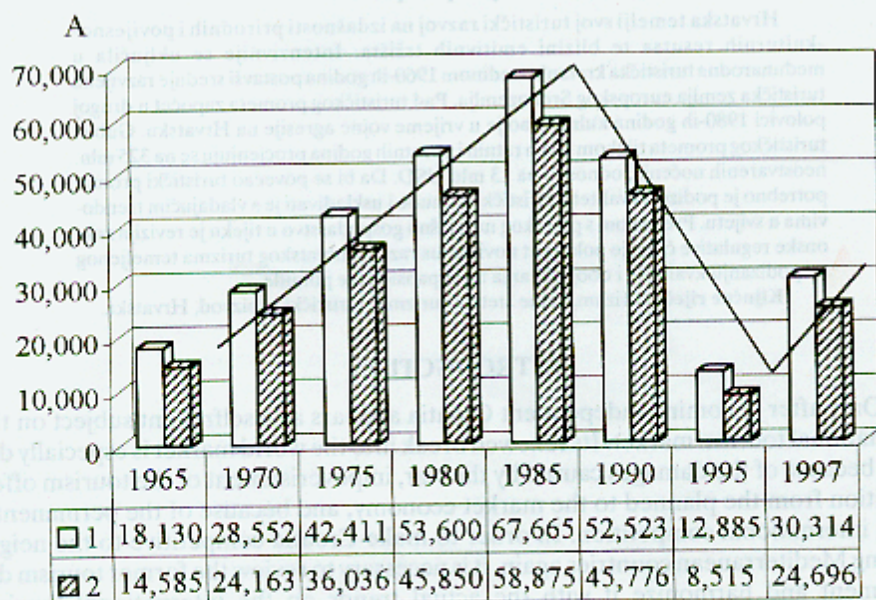


Fig. 1: The tourist flow in Croatia 1965-1997 (A - overnight stays in thousands, 1 - total, 2 - foreign)

Sl. 1: Kretanje turističkog prometa u Hrvatskoj 1965-1997. (A - noćenja u tisućama, 1 - ukupna, 2 - inozemna)

Tab. 1: Main Croatian tourist resources - regional scheme

| RESOURCES | CROATIA | SOUTH LITTORAL | NORTH LITTORAL | CONTINANTAL CROATIA |
|--------------------------------------|---------|----------------|----------------|---------------------|
| SPACE | | | | |
| Surface km ² | 56.538 | 12.043 | 5.807 | 38.688 |
| % | 100,0 | 21,3 | 10,3 | 68,4 |
| Length of coast km | 5.219 | 3.236 | 1.983 | |
| Length of islands/coast km | 4.012 | 2.771 | 1.241 | |
| Number of tourist destinations* | 342 | 192 | 101 | 49 |
| % | 100,0 | 56,1 | 29,5 | 14,3 |
| NATURAL RESOURCES | | | | |
| Reservation | 2 | 0 | 1 | 1 |
| National park | 7 | 4 | 1 | 2 |
| Natural park | 6 | 2 | 0 | 4 |
| Special reservation | 69 | 19 | 11 | 39 |
| Park forest | 23 | 9 | 4 | 10 |
| Important landscape | 28 | 15 | 3 | 10 |
| Natural monument | 72 | 26 | 11 | 35 |
| Horticultural monument | 114 | 19 | 12 | 83 |
| Total | 321 | 94 | 43 | 184 |
| % | 100,0 | 29,3 | 13,4 | 57,3 |
| REGISTERED CULTURAL MONUMENTS | | | | |
| Monument area | 845 | 256 | 201 | 388 |
| Single monuments | 2.293 | 1.063 | 187 | 1.043 |
| Total | 3.138 | 1.319 | 388 | 1.431 |
| % | 100,0 | 42,0 | 12,4 | 45,6 |
| PILGRIMAGE | | | | |
| | 7 | 1 | 1 | 5 |
| FESTIVALS/EVENTS | | | | |
| Folklore fiest | 1 | | | 1 |
| Titling the ring in Sinj | 1 | 1 | | |
| Vinkovci autumns | 1 | | | 1 |
| Lipovljani encounters | 1 | | | 1 |
| Đakovo embroideries | 1 | | | 1 |
| Carnivals | 4 | 1 | 2 | 1 |

* The data relate to the last pre-war year of normal business 1989.

Source: Popis posebno zaštićenih objekata prirode, 1991;
Nepokretni spomenici kulture, 1989.

Croatia more intensively joined the international tourist movements in the middle of the 1960s when, in the framework of the former Yugoslavia, it came to the liberalization of the international travellings and to the strengthening of the commercial tourism instead of up to that time prevailing social tourism. Basing its tourism development upon the conception of the mass tourism, mainly on the complementary accommodation capacities, Croatia, with 68 million overnight stays in the middle of the 1980s (1986), reached its maximum tourist flow, which afterwards started to decrease rapidly (Fig 1).

However, it is characteristic that during its intensive tourism development Croatia followed the trends of the international tourism increase on the European Mediterranean, and it even surpassed them by dynamics in some years.

In the last normal business year - 1989, with 9.6 million realized tourist arrivals (57% of the international ones), and 62 million overnights (63% of the international ones) and 923 thousand beds (22% in the primary capacities) Croatia ranged itself to the middle-developed tourist countries, having realized 4% of the arrivals and 3% of the international tourism receipts of this region (Fig. 2).¹

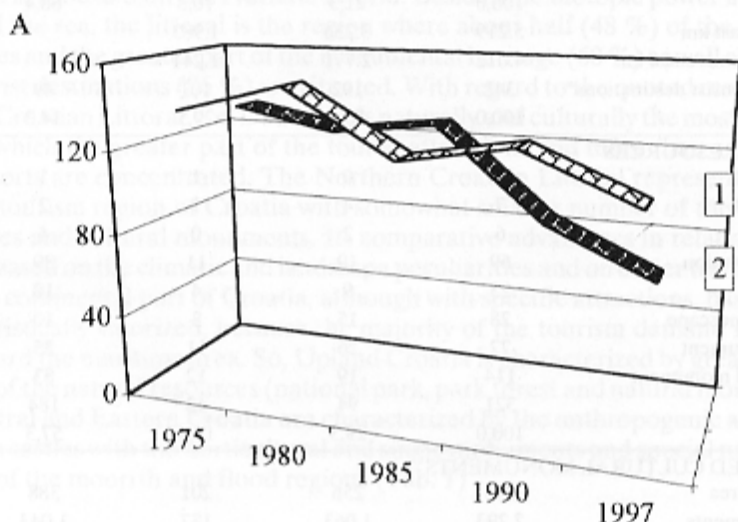


Fig. 2: Index of international tourist arrivals 1970-1996 (A - arrivals, 1 - European Mediterranean, 2 - Croatia)

Sl. 2: Indeks kretanja međunarodnog turističkog prometa 1970-1996. (A - dolasci, 1 - Europsko Sredozemlje, 2 - Hrvatska)

The economic difficulties and the war years caused a rapid decrease of the tourism activities, and today Croatia, with 30 million realized overnight stays, is placed on the level of the tourist flow from the beginning of the 1970s.

The development of tourism in particular Adriatic regions took place till the middle of the 1970s more or less with the same dynamics. In that period the Northern and Southern Croatian Littoral realized the equal tourist flow (over 40% each), and in the following years, owing to better traffic connections and more intensive tourist construction, Istria and Kvarner became the leading tourism regions with over half of the total overnight stays. At the same time the Southern Croatian Littoral reduced its share in the country's total overnight stays from near a half (45%-1975) to one third (33%-1985), primarily because of the tourist flow decline on the hardly approachable islands of Zadar and in the distant region of Dubrovnik (Fig. 3, tab. 2).

Tab. 2: Tourist flow in Croatia according to the regions 1975-1997 (overnight stays in 1000)

| YEAR | 1975 | 1980 | 1985 | 1990 | 1995 | 1997 |
|---------------------|--------|--------|--------|--------|--------|--------|
| Northern littoral | 18,022 | 27,627 | 35,930 | 29,007 | 10,378 | 20,969 |
| Southern littoral | 19,077 | 21,057 | 22,085 | 19,538 | 1,304 | 7,956 |
| Continental Croatia | 5,312 | 4,916 | 9,650 | 3,978 | 1,204 | 1,390 |

Source: Turizam 1975-1997. DZS, Zagreb

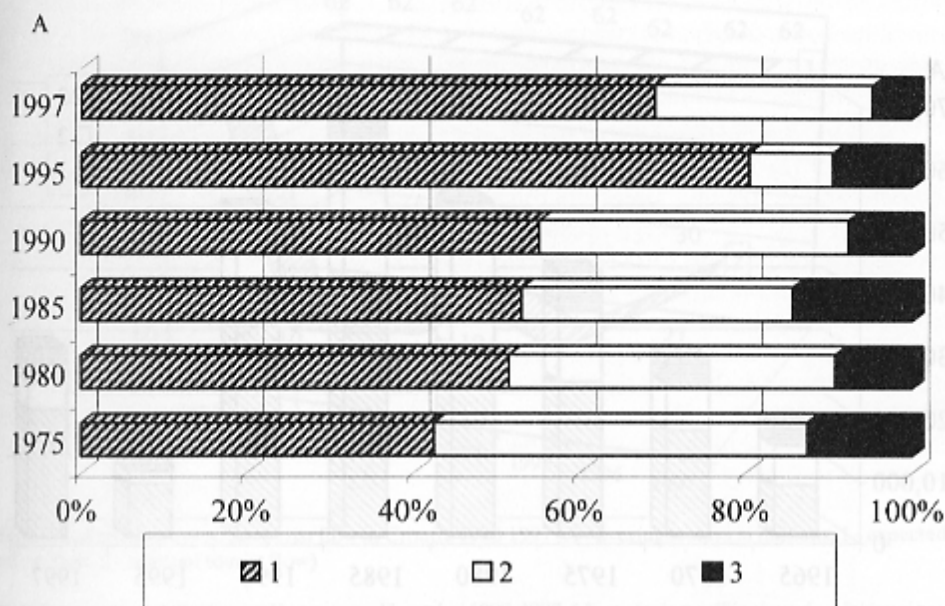


Fig. 3: Tourist flow in Croatia according to the regions 1975-1997 (A - years, 1 - the northern littoral, 2 - the southern littoral seaside, 3 - continental Croatia)

Sl. 3: Turistički promet u Hrvatskoj po regijama 1975-1997. (A - godine, 1 - sjeverno primorje, 2 - južno primorje, 3 - kontinentalna Hrvatska)

Croatia is traditionally oriented toward the foreign market and the share of those tourists was dominant in the whole observed period. The traditional tourist generating European countries: Germany, Italy, Austria and the Netherlands accounted even for four fifths (about 80%) of the international overnight stays, relatively for half (52%) of the total tourist overnights in Croatia. The domestic tourist flow, which, according to the statistical methodology, included all the republics of the former Yugoslavia, accounted for somewhat more than one third (37%) of the total overnight stays, out of which the domicile tourist flow of the Croatian citizens accounted only for a smaller part, so that only every twelfth tourist out of hundred (12,5%) was from Croatia (Fig. 4, Tab. 3).

Tab. 3: Tourist flow in Croatia according to the countries of origin 1965-1997 (overnight stays in 1000)

| YEAR | 1965 | 1970 | 1975 | 1980 | 1985 | 1990 | 1995 | 1997 |
|--------------------------------|-------|--------|--------|--------|--------|--------|-------|--------|
| FOREIGN COUNTRIES | 8,191 | 17,069 | 24,650 | 30,125 | 41,597 | 34,049 | 8,515 | 20,435 |
| REPUBLICS OF FORMER YUGOSLAVIA | 6,394 | 7,094 | 11,386 | 15,725 | 17,829 | 11,727 | 2,060 | 4,262 |
| CROATIA | 3,545 | 4,389 | 6,375 | 7,750 | 8,790 | 6,747 | 4,370 | 5,617 |

Source: Turizam 1965-1997. DZS, Zagreb

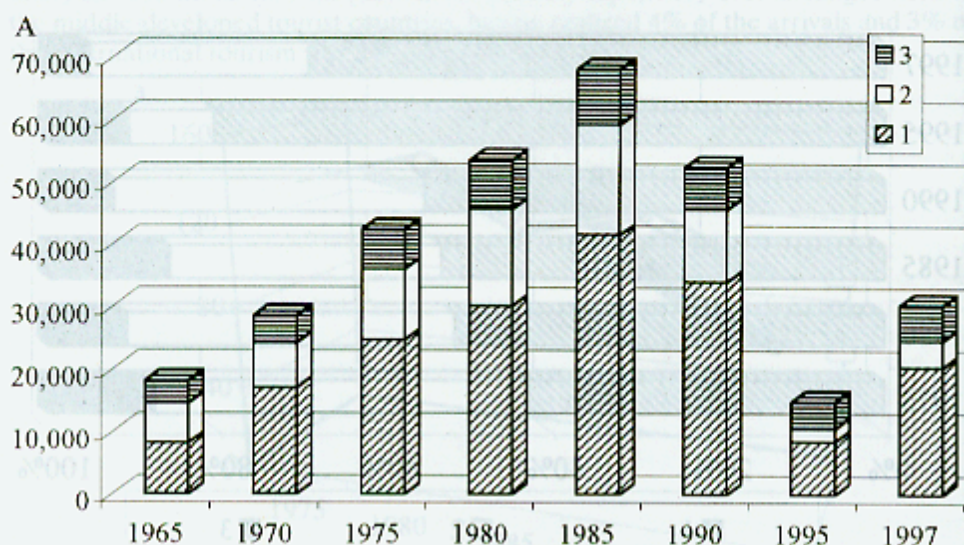


Fig. 4: Tourist flow in Croatia according to mainland 1965-1997 (A - overnight stays in thousands, 1 - foreign countries, 2 - republics of the former Yugoslavia, 3 - Croatia)

Sl. 4: Kretanje turističkog prometa u Hrvatskoj po zemljama porijekla 1965-1997. (A - noćenja u tisućama, 1 - inozemstvo, 2 - republike bivše Jugoslavije, 3 - Hrvatska)

A slight decrease of the tourist flow which had begun in Croatia in the second half of the 1980s because of the economic disarrangement, drastically increased in 1991 owing to the war aggression on Croatia and its spreading to the area of neighbouring Bosnia and Herzegovina. Only within a year, from 1990 to 1991, the tourist flow in Croatia decreased for 81 percent, from 53 to 10 million overnight stays. The losses of the tourist flow were cumulated during the eight war and post-war years (1990-1997), and, in relation to the basic normal business year, 1989, they amounted to 325 million, respectively 41 million overnights on the average annually. So, in every war and post-war year, on the average 66 percent of the overnights were realized less than it would have been possible to realize if there had been no war (Fig. 5).

Regionally observed, the war consequences hit Dalmatia most intensively. Before the war, over one third of the total tourist flow was realized there. Due to closeness of the battleground and traffic isolation caused by the war, the tourism activity in Dalmatia almost died out during the war years, and the majority of the tourist flow was concentrated in two more safe regions: Istria and Kvarner. Cumulating the tourist flow losses in the period 1990-1997, Dalmatia lost even 80 percent of the potential overnight stays, which amounted to about 19 million overnights on the average annually (Fig. 6).

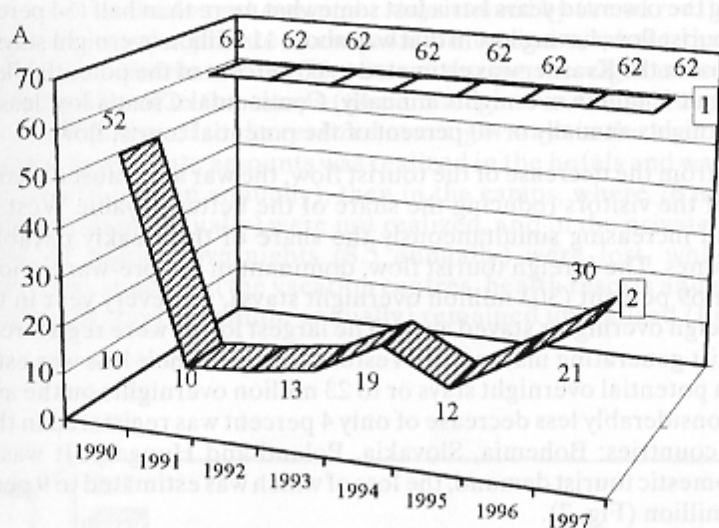


Fig. 5: Realized and expected tourist flow in Croatia 1990-1997 (A - overnight stays in millions, 1 - expected tourist flow, 2 - realized tourist flow)

Sl. 5: Ostvareni i očekivani turistički promet u Hrvatskoj 1990-1997. (A - noćenja u milijunima, 1 - očekivani turistički promet, 2 - ostvareni turistički promet)

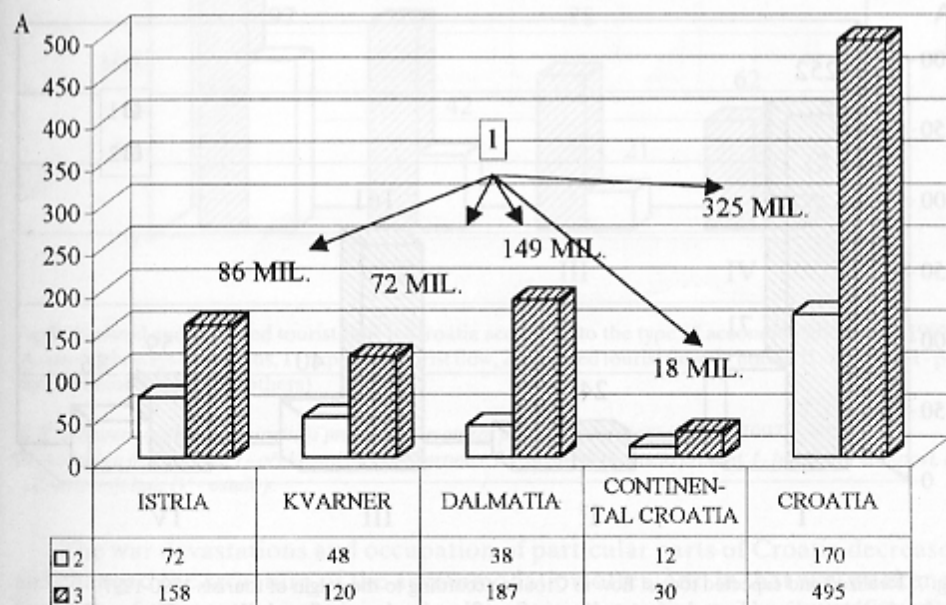


Fig. 6: Realized and expected tourist flow in Croatia according to the regions 1990-1997 (A - overnight stays in millions, 1 - cumulate loss, 2 - realized tourist flow, 3 - expected tourist flow)

Sl. 6: Ostvareni i očekivani turistički promet u Hrvatskoj po regijama 1990-1997. (A - noćenja u milijunima, 1 - kumulirani gubitak, 2 - ostvareni turistički promet, 3 - očekivani turistički promet)

During the observed years Istria lost somewhat more than half (54 percent) of the potential tourist flow, having lost in that way about 11 million overnight stays, while the cumulate loss in the Kvarner was estimated to 60 percent of the potential flow, respectively to about 9 million overnights annually. Continental Croatia lost least - about 2 million overnights annually or 40 percent of the potential tourist flow.

Apart from the decrease of the tourist flow, the war also caused changes in the structure of the visitors reducing the share of the better payable West European tourists and increasing simultaneously the share of the weakly payable Central European ones. The foreign tourist flow, dominant in the pre-war period, was decreased for 69 percent (303 million overnight stays), i. e. every year in Croatia 38 million foreign overnights stayed away. The largest losses were registered by traditional tourist generating markets of Western Europe. Their loss was estimated to 181 million potential overnight stays or to 23 million overnights on the average annually. A considerably less decrease of only 4 percent was registered in the Central European countries: Bohemia, Slovakia, Poland and Hungary. It was even less than the domestic tourist demand, the loss of which was estimated to 9 percent or to totally 23 million (Fig. 7).

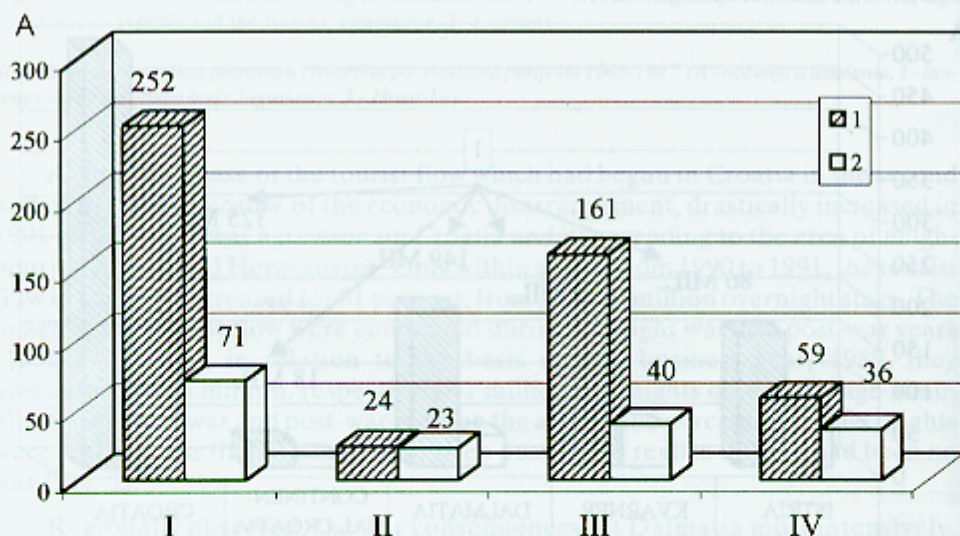


Fig. 7: Realized and expected tourist flow in Croatia according to the origin of tourists 1990-1997 (A - overnight stays in millions, 1 - expected tourist flow, 2 - realized tourist flow, I - Western Europe, II - Central Europe, III - others, IV - Croatia)

Sl. 7: Ostvareni i očekivani turistički promet u Hrvatskoj prema porijeklu turista 1990-1997.

(A - noćenja u milijunima, 1 - očekivani turistički promet, 2 - ostvareni turistički promet, I - zapadna Europa, II - srednja Europa, III - ostalo, IV - Hrvatska)

The absence of the tourist overnight stays caused by the war reflected itself most intensively on the private accommodation business, where the overnight stays cumulatively decreased for 76 percent during the eight observed years. Then it reflected itself in the camps (64 percent) and in the primary capacities (57 percent). With regard to the realized overnight stays in the basic year, 1989, the largest loss in absolute amounts was realized in the hotels and was estimated to 130 million (16 million annually), then in the camps, where 76 million overnight stays (9 million annually) were not realized, and in the private accommodation, where 68 million overnights (8.5 annually) were lost, while in other accommodation capacities (the vacation centres, health resorts and similar) 51 million overnight stays (6 million annually) remained unrealized (Fig. 8).

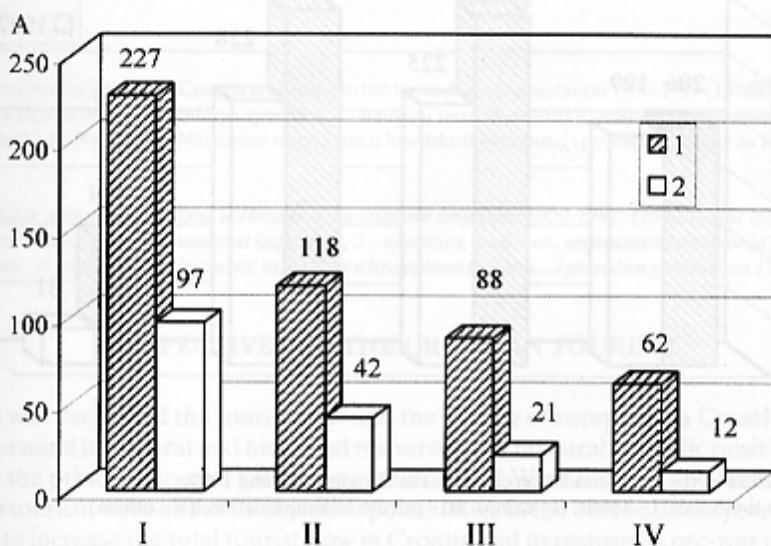


Fig. 8: Realized and expected tourist flow in Croatia according to the type of accommodation 1990-1997 (A - overnight stays in millions, 1 - expected tourist flow, 2 - realized tourist flow, I - hotels, II - private accommodation, III - private accommodation, IV - others)

Sl. 8: Ostvareni i očekivani turistički promet u Hrvatskoj prema vrsti smještaja 1990-1997.

(A - noćenja u milijunima, 1 - očekivani turistički promet, 2 - ostvareni turistički promet, I - hoteli, II - kampovi, III - privatni smještaj, IV - ostalo)

The war devastations and occupation of particular parts of Croatia decreased and changed the structure of the accommodation offer, and in that way weakened the basis of the country's tourism development. According to the data of the Bureau of Statistics, during the observed period the total accommodation offer of Croatia was decreased for one third, from 923 thousand in 1989 to 683 thousand beds in 1997. However, the real decrease was considerably larger, because the statistical evidence included the objects destroyed in the war as well as the capacities

given to the refugees and displaced persons for temporary use. The largest decrease was registered in the complementary capacities which react more rapidly to the changes of the tourist demand: in the vacation centres (72 percent), in the private accommodation (26 percent) and in the camps (25 percent), while the share of beds in the hotels remained nearly unchanged, although a part of those capacities was also drawn from the commercial offer due to the temporary accommodation of the refugees (Fig. 9).

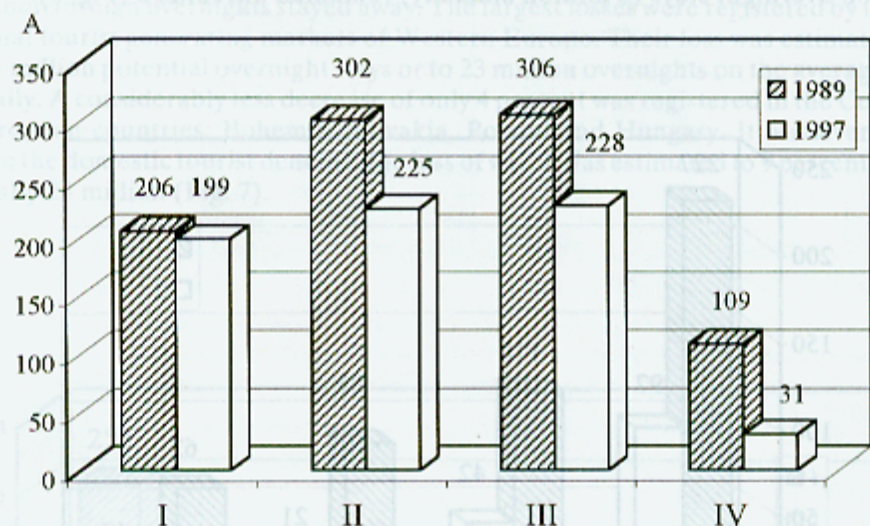


Fig. 9: Structure of the accommodation capacities in Croatia 1989 and 1997
(A - beds in thousands, I - hotels, II - camps, III - private accommodation, IV - others)

Sl. 9: Struktura smještajnih kapaciteta u Hrvatskoj 1989. i 1997.

(A - ležajevi u tisućama, I - hoteli, II - kampovi, III - privatni smještaj, IV - ostalo)

The tourist flow decrease, especially the foreign one, caused by the war, as well as changes in the structure of the accommodation offer, reflected themselves to the decrease of the tourism receipts (N. Ivandić, A. Radnić 1996). Based on the estimate of the average daily tourist expenditure in Croatia in particular types of accommodation, and on the lost overnight stays in them, the receipts loss in the commercial capacities during the observed period was estimated to 10.3 billion US\$. It was necessary to add to those losses the amount of about 2.7 billion US\$ (lost flow of the nautical and transit tourists, and provisions of the tour-operators), so that the total indirect receipts' losses in tourism in Croatia amounted to about 13 billion US\$. The quoted estimates are only a part of the income losses in tourism which will continue to cumulate in the following years because of the decreased tourist flow in the country (Fig. 10).²

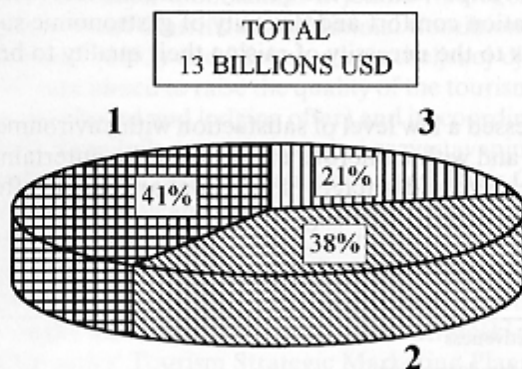


Fig. 10: Tourism receipts loss in Croatia according to the types of accommodation 1990-1997 (13 billions US\$) (1 - primary capacities, 2 - secondary capacities, 3 - nautical tourists, transit tourists, tour-operators)
Source: Ivandić, N. Radnić, A.: Neizravne ratne štete u hrvatskom turizmu... i proračun gubitka za 1996. i 1997. god.

Sl. 10: Gubitak prihoda od turizma u Hrvatskoj po vrstama smještaja 1990-1997. (13 milijardi US\$) (1 - primarni kapaciteti, 2 - sekundarni kapaciteti, 3 - nautičari, tranzititi, organizatori putovanja)
Izvor: Ivandić, N., Radnić, A.: Neizravne ratne štete u hrvatskom turizmu... i proračun gubitaka za 1996. i 1997. godinu

PERSPECTIVES OF THE CROATIAN TOURISM

The war decreased the tourist flow and the quality of reception in Croatia. But, if we bear in mind its natural and historical resources and favourable traffic position in relation to the principal tourist generating countries of West Europe, the results of the Croatian tourism were under its objective possibilities in the best business years as well. In order to increase the total tourist flow in Croatia and to restore its pre-war positions on the international market, it is necessary, abreast with entering the market business, to raise the quality of the tourism offer and to coordinate it with the leading trends on the international market. On the competitive international market a special attention is paid to various elements which, together with attractive resources, can draw the guests more easily and make their sojourn in destination more comfortable, attractive and of higher quality. A special attention is also paid to the environment protection, to the safety and protection of the guests, as well as to the quality of the accommodation services, to the authenticity of the tourist contents, and to the riches and diversity of the contents other than board and lodging (Hitrec 1997).

Analyzing the results of the survey taken among the tourists in Croatia in summer 1997³, it is possible to notice the advantages and disadvantages of the Croatian tourist offer and to compare them with the main trends in the world.

Evaluating the 24 elements of the tourist offer, the tourists in Croatia gave high marks to the scenery, personal safety and quality of food in the accommodation faci-

ties, so these elements are singled out as the advantages of the Croatian tourism and they fit into the existing general trends. The elements of the accommodation services, among which the most important are the quality of the services in the accommodation facilities, accommodation comfort and diversity of gastronomic supply, were middle evaluated, which points to the necessity of raising their quality to bring them near the European standards.

The guests expressed a low level of satisfaction with environmental preservation, with value of money and with numerous elements of the entertainment-cultural and recreation offer, which, as disadvantages of the Croatian tourism offer, have to be modernized and fit into the existing trends (Tab. 4).

Tab. 4: Level of satisfaction of main elements of tourist offer

| RANK | ELEMENTS | LEVEL |
|------|---|-----------|
| 1. | Natural attractiveness | |
| 2. | Suitability for family vacation | Very high |
| 3. | Friendliness of the local population | |
| 4. | Kindness of staff | |
| 5. | Personal safety | High |
| 6. | Quality of food in restaurants | |
| 7. | Suitability for short brake | |
| 8. | Quality of food in accommodation facilities | |
| 9. | Tidiness of resort | |
| 10. | Quality of services in accommodation facilities | |
| 11. | Peace and quietness | Middle |
| 12. | Comfort of accommodations | |
| 13. | Diversity of gastronomic supply | |
| 14. | Environmental preservation | |
| 15. | Value for money | |
| 16. | Diversity of organized excursions | Low |
| 17. | Quality of tourist information | |
| 18. | Diversity of sport possibilities | |
| 19. | Tidiness of beaches | |
| 20. | Quality of signs marking attractions | |
| 21. | Diversity of entertainment | Very low |
| 22. | Shopping possibilities | |
| 23. | Diversity cultural events | |
| 24. | Quality of the local transport | |

Source: TOMAS '94 - Stavovi i potrošnja turista u Hrvatskoj

Due to the necessity of modernization and raising of the quality of the entire tourism offer, and to the process of transition from the planned to the market economy, there is a revision of the existing law regulations in Croatia, and a series of laws and regulations have been layed down so far, as well as a succession of the strategic documents regulating activities in tourism and catering. The key documents "Glavni turistički plan Hrvatske" ("Tourism Master Plan of Croatia") (1992) and "Razvojna strategija hrvatskog turizma" ("Development Strategy of Croatian Tourism") (1993)

put into the first plan development factors such as renovation, a more complete valorization and protection of tourism potentials and a high-grade personnel transformation. "Pravilnik o razvrstavanju, minimalnim uvjetima i kategorizaciji ugostiteljskih objekata" ("Regulations about Classification, Minimal Conditions and Categorization of the Catering Facilities" (1993) and "Zakon o ugostiteljskoj djelatnosti" ("Catering Activities Act") (1997) are aimed to raise the quality of the tourism offer (accommodation offer and other than board and lodging offer) and its coordination with the European standards, while "Pravilnik o proglašavanju i razvrstavanju turističkih mjesta u razrede" ("Proclamation of the Tourist Destinations and Their Classification" (1994) and "Zakon o turističkim zajednicama i promicanju hrvatskog turizma" ("Act about the Tourist Communities and Promotion of the Croatian Tourism") (1994) are aimed to classify the tourist places according to the intensity of the tourist flow into the categories and the resultant law commitments. They are also directed to the creation of the tourism management system on the local, county and state level. "Strateški marketinški turistički planovi županija" ("Counties' Tourism Strategic Marketing Plans") are being worked on, and they are designed to realize the authentic tourist contents and development of a new identity of the Croatian tourism in order to help Croatia to join the international tourist market.

A new cycle of the Croatian tourism development has been started in this way. In the first place it relies upon various and preserved natural and cultural heritage, upon raising of the quality and diversity of the tourism offer and upon the enormous sources of the tourist demand in the neighbourhood.

CONCLUSION

The end of the war in Croatia and wider neighbouring area was the basic prerequisite for normalization of life and economic activity. This refers especially to the tourism which bases its *raison d'être* upon peace, safety of the guests, attraction of resources, and upon so created image and appeal of a tourist destination. The return of the tourist flow to the pre-war figures is still uncertain, because it is necessary, apart from the stable peace in wider region, to offer a better quality of services and to modernize the tourism product consonant with the existing trends on the principal markets. On that account the raising of the tourism offer quality, respectively of the total tourism product, becomes the basic orientation of further development of the Croatian tourism.

NOTES

1 In 1989 the European Mediterranean countries registered 134 million of the international arrivals and 50 billion US\$ of the international tourism receipts. In the same year Croatia registered 5.6 million of the international arrivals and 1.5 milliard US\$ of income from the international tourism. WTO-Compendium of T. Statistics Madrid, 1991; Stavovi i potrošnja turista u Hrvatskoj 1989. Institut za turizam, Zagreb, 1989.

2 The average daily expenditure of the tourists in particular types of accommodation was obtained by survey of the tourists in Croatia in summer 1994. In the primary capacities it figured out 40.65 US\$ on the average

daily, and in other types of accommodation it figured out 25.61 US\$. Source: Stavovi i potrošnja turista u Hrvatskoj 1994. Institut za turizam 1994.

3 The Institute for Tourism carried out a representative survey during the four summer months of 1997 in 93 places of 7 littoral counties, and the survey included 3.537 tourists. The results were published in the essay "Stavovi i potrošnja turista u Hrvatskoj - TOMAS 1997". Zagreb, 1997.

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SAŽETAK

Turizam Hrvatske - stanje i perspektive

by

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Hrvatska je atraktivna turistička zemlja koja temelji svoj turistički razvoj na izdašnosti prirodnih i povijesno-kulturnih resursa te blizini emitivnih tržišta. Pregled turističkih resursa pokazuje da se većina kvalitetnog turističkog prostora i atrakcija nalazi na jadranskom primorju. Uz biotopnu snagu i privlačnost mora na primorju je smještena oko polovica (48%) zaštićenih objekata prirode i najveći dio spomeničke baštine (60%) kao i većina mjesta (86%) u kojima se ostvaruje turistički promet. Kontinentalno područje Hrvatske, premda posjeduje specifične atraktivnosti, do sada nije jače turistički valorizirano budući da je glavina turističke potražnje još uvijek usmjerena na maritimni prostor.

Hrvatska se intenzivnije uključila u međunarodna turistička kretanja sredinom 1960-ih godina kada u sklopu bivše Jugoslavije dolazi do liberalizacije inozemnih putovanja te jačanja komercijalnog,

umjesto do tada prevladavajućeg socijalnog turizma. Temeljeći turistički razvoj na koncepciji masovnog turizma, oslonjenog pretežno na ponudi komplementarnih smještajnih kapaciteta, Hrvatska je s 68 milijuna ostvarenih noćenja sredinom osamdesetih godina (1986) dosegla maksimalan turistički promet koji nakon toga počinje opadati.

Do sredine 1970-ih godina razvoj turizma na Jadranu odvijao se istom dinamikom. Sjeverno i Južno Hrvatsko primorje ostvarivali su u tom razdoblju podjednak turistički promet (preko 40% svaki), da bi u idućim godinama zahvaljujući boljoj prometnoj povezanosti i intenzivnijoj turističkoj izgradnji Istra i Kvarner postale vodeće turističke regije u zemlji. Hrvatska je tradicionalno orijentirana na inozemno tržište te su zemlje zapadne Europe Njemačka, Italija, Austrija, Velika Britanija i Nizozemska sudjelovale, pred domovinski rat, čak s četiri petine (oko 80%) u inozemnim, odnosno s polovinom (52%) u ukupnim turističkim noćenjima. Domaći turistički promet, koji je obuhvaćao sve republike bivše Jugoslavije, činio je nešto više od jedne trećine (37%) ukupnih noćenja, od čega se na domicilni turistički promet hrvatskih građana odnosio tek manji dio (12,5%).

LAGANI PAD turističkog prometa koji je započeo u Hrvatskoj u drugoj polovici 1980-ih godina uslijed gospodarskih poremećaja, drastično je smanjen 1991. godine jačanjem ratnih sukoba. Gubici turističkog prometa kumuliraju se tijekom osam ratnih i poratnih godina (1990-1997) te, u odnosu na baznu godinu normalnog poslovanja 1989., iznose ukupno 325 mln neostvarenih noćenja, odnosno 41 mln u prosjeku godišnje. Posljedice rata najjače su pogodile Dalmaciju, a glavnina turističkog prometa koncentrirala se u dvije sigurnije regije Istri i Kvarneru. Kumulirajući gubitke turističkog prometa u razdoblju 1990-1997. Dalmacija je izgubila čak 80 posto realno očekivanih noćenja što iznosi prosječno godišnje oko 19 mln., Istra je izgubila nešto više od polovice (54 posto) izgubivši tako godišnje oko 11 mln noćenja dok je na Kvarneru kumulativni gubitak procenjen na 60 posto mogućeg ostvarenog prometa, odnosno oko 9 mln noćenja na godinu. Kontinentalna Hrvatska izgubila je 40 posto potencijalnog turističkog prometa. Rat je uz smanjenje obujma prometa uvjetovao i promjene u strukturi posjetilaca, smanjujući udio bolje platežnih zapadnoeuropskih uz istodobno povećanje udjela slabije platežnih srednjoeuropskih turista. Najveće gubitke zabilježila su tradicionalna emisivna tržišta zapadne Europe čiji se gubitak procjenjuje na 181 mil. potencijalnih noćenja ili 23 mil. u prosjeku na godinu, dok znatno manje smanjenje bilježe srednjoeuropske zemlje Češka, Slovačka, Poljska i Madarska (4 posto), čak manje od domaći turističke potražnje (9 posto).

S obzirom na smještaj najveći gubici bilježe se u hotelima a procjenjuju se na 130 mln neostvarenih noćenja (16 mln. na godinu), potom u kampovima gdje je ostalo neostvareno 76 mln noćenja (9 mln. godišnje) i u privatnom smještaju u kojem je izgubljeno 68 mln. noćenja (8,5 mln na godinu). U ostalim smještajnim kapacitetima (odmarališta, lječilišta i sl.) ostalo je neostvareno 51 mln noćenja (6 mln. na godinu). Ratom uvjetovano smanjenje turističkog prometa kao i promjene u strukturi smještajne ponude odrazilo se, u promatranom razdoblju, i na smanjenje prihoda od turizma. Dosađajni neizravni gubici prihoda od turizma u svim vrstama smještaja kao i onima nastalim u tranzitnom i nautičkom turizmu te turističkom posredovanju u Hrvatskoj, procjenjuju se na oko 13 mld USD koji će se i u idućim godinama nastaviti kumulirati.

Rat i njegove posljedice odrazili su se nadalje i na smještajnu turističku ponudu. U promatranom razdoblju broj posjetitelja je smanjen za jednu trećinu, od 923 tisuće u 1989. na 683 tisuća u 1997. godini. Najveće smanjenje od 32 posto registrirano je kod komplementarnih kapaciteta koji brže reagiraju na promjene u turističkoj potražnji, dok je udio postelja u hotelima ostao gotovo nepromijenjen iako se dio ovih kapaciteta još uvijek koristi za smještaj izbjeglica.

Premda je rat smanjio turistički promet i umanjio kvalitetu receptive ostvareni rezultati u turizmu Hrvatske i u normalnim godinama poslovanja bili su ispod objektivnih mogućnosti. Da bi se u dogledno vrijeme povećao ukupan turistički promet potrebno je podizati kvalitetu turističke ponude te je usklađivati s vladajućim trendovima u svijetu. Na međunarodnom turističkom tržištu sve veća se pozornost posvećuje zaštiti okoliša, sigurnosti gostiju, kvaliteti smještajne ponude, autentičnosti turističkih sadržaja te bogatstvu i raznolikosti sadržaja izvanpansionske ponude.

Istraživanja stavova i potrošnje turista u Hrvatskoj otkrivaju prednosti i nedostatke turističke ponude i njenu uklopljenost u opće turističke trendove. Ocjenjujući glavne elemente turističke ponude gosti su u Hrvatskoj izrazili visok stupanj zadovoljstva s ljepotama prirode, osobnom sigurnosti i kvalitetom hrane u smještajnom objektu te se ovi elementi izdvajaju kao prednosti hrvatskog turizma i uklapaju se u postojeće opće trendove. Elementi smještajne ponude od kojih su najvažniji kvaliteta usluga u smještajnom objektu, komfor, smještaj i bogatstvo gastronomije srednje su ocijenjeni što ukazuje na potrebu podizanja njihove kvalitete kako bi se približili europskim standardima. Nizak stupanj zadovoljstva gosti su izrazili s vrijednosti za novac i mnogobrojnim elementima izvanpansionske ponude koje je kao nedostatke hrvatske turističke ponude potrebno osuvremeniti i uklopiti u postojeće trendove. Imajući na umu potrebu modernizacije i podizanja kvalitete ukupne turističke ponude kao i proces prelaska s planskog na tržišno gospodarstvo u Hrvatskoj je u tijeku revizija postojeće zakonske regula-

tive te je do sada doneseno niz zakona i strateških dokumenata koji na novim osnovama reguliraju aktivnosti na području turizma i ugostiteljstva. Na taj način pokrenut je novi ciklus razvoja hrvatskog turizma oslonjenog prvenstveno na raznolikoj i očuvanoj prirodnoj i kulturnoj baštini, na podizanju kvalitete i obogaćivanja postojeće turističke ponude te na golemim izvorima turističke potražnje u neposrednoj blizini zemlje. Ovisno o brzini provođenja ovih inovacijskih mjera ojačat će i konkurent-ska sposobnost hrvatskog turizma u širem sredozemnom okruženju.

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