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The Almost Great Escape: The Continuing Tourism Development of Croatia as a Destination

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Introduction:

Tourism in Croatia has been steadily increasing since The Last War, the name concocted by locals who experienced it, between Croatia, Serbia, and Bosnia-Herzegovina, which occurred from 1991-1994. While there has been constant, but slow, improvement, there are still many technological advancements and innovations that need to be redesigned in order to improve the quality of life for the Croatian citizens, as well as the experience for incoming tourists. Studies have shown and proven that tourism is one of the leading industries that affect a nation's economy, specifically the economy in adherence with transportation and hospitality industries (*Croatia Tourism Report 2016*). Since the Fall of Communism, Croatia has struggled to find its feet as an independent country, while improving economic factors. When Croatia joined the European Union in 2013, there was a slow increase in the tourist fluctuations (*Croatia Tourism Report 2016*). While improving economic factors in transportation and hospitality, more tourists will have the opportunity to explore the remote regions of Croatia, as well as promoting local businesses, offering a more cultural experience for tourists. The issue that this study addresses is the need for tourism development in Croatia. To address this problem, the purpose of this study will be exploring the history of tourism in Croatia, current developments, and future projected tourist numbers and developments by utilizing a transformative, mixed methods approach. In February 2016 and July 2016, I traveled to several cities in Croatia to gather data. This research was conducted during high and low seasons of tourism in order to compare the different business strategies from locals and tourist fluctuations. The different sub-industries of focus in tourism are transportation, gastronomy, hospitality, and attractions. By observing the popularity, or

otherwise unpopularity, of businesses in these sub-industries, I can identify the tourism managerial issues at hand. The data that I collected led to three major observations: there is a drastic need for eTourism, the job market for Croatians is selective and unreliable, and English as a secondary language is rarely utilized in these Croatian tourist destinations. The *Croatia Tourism Board* states that there are weaknesses in the tourism industry because of lack of reliable transportation, accessible accommodation, and a highly seasonal market. By improving the different sub-industries of tourism through innovation of resources, the introduction of eTourism, and changes in managerial styles, the Croatian economy can improve overall with the rapid increase of inbound tourists, offering a better quality of life for the Croatian citizens. There is a certain degree of homogenization by the Croatian government and the Croatian Tourism Board to create a destination that would appeal to many tourists who travel to other European countries.

Croatian Culture and Tourist Attractions:

Because of Croatia's long history of living under different empires and powers, there are several different cultures within the national Croatian culture. Croatia's Istrian peninsula has architecture from Ancient Rome, including one of the best well-preserved Roman amphitheaters in all of Europe dating back to 80AD. Dubrovnik offers a look into the medieval times in which Croatia was ruled under the Venetians. It's enormous and extremely well-preserved city walls are one of the main tourist attractions in all of Croatia. In the capital of Zagreb, there are several different influences, but one of the most noticeable is from Austria, not only with architecture, but with food as well. Because Croatia borders Serbia and Bosnia-Herzegovina, there are Turkish influences as well, especially gastronomically. Much of Croatia traditional food is of Turkish

decent, such as *cevapcici*, much like sausage but mixed with pork and beef. Because of Croatia's history of maritime as an industry, the seafood selection is wide and fresh from the Mediterranean. Croatia is also famous for their wines. The climate in Croatia is usually mild or warm throughout the year, making it perfect for vineyards to flourish. There is a wide variety of Croatian wines, some that even challenge Italian or French wines for their sweet taste.

While Zagreb is the capital of Croatia, it is certainly not the main tourist destination. Instead, many of the tourists flock to the more tropical regions of Croatia along the Adriatic Coast.

Dubrovnik is Croatia's biggest tourist city. Each summer, the numbers are growing more and more for incoming tourists. In the past couple of years, cruise ships have made it a point to stop for a day trip in Dubrovnik, letting their passengers roam the enclosed city for a day. There can be as many as 600,000 tourists in one day within the city walls, which are only a few miles in diameter. Since the filming of the HBO series *Game of Thrones*, many fans have flocked to the city in order to get a taste of King's Landing, one of the main settings for the show. The television series boosted tourist numbers exponentially within the city. Other notable cities are Split and Zadar, also along the coast of the Adriatic, to the north of Dubrovnik. Both cities are famous for their medieval and Roman architecture, all in excellent, original condition. In July 2016, Split hosted the Ultra Europe Music Festival. This festival brought more than 300,000 tourists into the city just for the weekend.

There are more than 1,000 islands that belong to Croatia. Two of the most notable are Hvar and Korčula, both not far from Dubrovnik. These islands are filled with resorts and are extremely expensive to visit, however, they offer an island getaway. Near the border of Bosnia-Herzegovina, there is a national park called Plitvice. It contains a series of several waterfalls,

strenuous but enjoyable hiking trails, and beautiful, crystal clear-blue lakes. This region is extremely well-developed for tourists, offering a variety of amenities and accommodations for several different groups.

History of Tourism in Croatia:

The history of Croatian tourism was divided into six different periods: the first development period, a period of curiosity in the 19th century, the period of "Consciousness-building from the early 20th century to World War I, the period of initial achievements between the two World Wars, the period of intensive tourism development after World War 2, and the period of rehabilitation and consolidation, notably after the breakup of Yugoslavia (Antolovic 203-4).

When Yugoslavia dissolved in 1991, Croatia, Bosnia-Herzegovina, and Serbia began a war with each other fueled by religious beliefs. This war led to a complete stand-still in the development of Croatian tourism because none of the cities were safe to visit. "Tourist numbers in Croatia dropped dramatically between 1991 and 1995... war crippled the Croatia tourism industry..." (Beirman 231). Citizens from countries like Austria and Italy continued to visit while the French and British halted their visits due to the accurate media coverage of the war in France and Great Britain. In 1985, 8.35 million tourists visited Croatia while in 1990, it dropped to 7.05 million people, however, in 1995, tourists numbers dropped drastically with only 1.23 million tourists (Treharne 73). Even in 2003, the tourist numbers were still below those in 1985 (Beirman 232). The war led to mass destruction throughout the three countries, as well as a refugee crisis (Cvitanic 37). Many reparations had to be made from the destruction of the war in order for tourism to become a major industry again.

Issues with Current Tourism Development and Possible Solutions:

In tourism as a whole, there is the idea of Old Tourism versus New Tourism. Old Tourism is the idea that arose post-World War II—the introduction of the jet aircraft in 1958, cheaper oil, Keynesian-inspired economic growth, and this growth led to the "stultifying homogenization of products and communities" (Cooper 131). After the 1990s, the idea of New Tourism emerged based on 'common sense' and 'flexibility'. Features of New Tourism include the introduction of new information systems within the tourist industry, deregulation of the airline industry, technological competition, and recognizing the negative impact of mass tourism on host countries (Cooper 131). When looking at current tourism developments, it is important to keep in mind these ideas of New Tourism while reassuring the roots of 'common sense' and 'flexibility' for travelers.

One of the issues that many tourists find to be frustrating is that Croatia has not adopted the Euro as their main form of currency. They still continue to use the Croatian Kuna, which is about 7.52 HRK to 1 Euro. "The introduction of a Single European Currency (the euro) and the creation of a 'euro-zone' has facilitated travel throughout Europe by doing away with currency exchange" (Boniface and Cooper 119). However, a currency exchange does pose a barrier to incoming tourists. Croatia still has to prove to the European Union that they are strong economically in order to adopt the Euro as their main form of currency.

There posed an issue for travelers who were not arriving by land (mainly from other European nations). Visitors from the United States, Canada, Asian countries, and Australia need to fly in order to enter Croatia. This meant that there needs to be a development within the transportation

systems within Croatia, including updating airports to accommodate more tourists as well as the extension of the railways. The railroads in the north were improved to accommodate foreign visitors from the north, however, to the south, the rail lines completely stop halfway through Croatia (Beirman 235).

In 2016, the Croatian National Tourist Board claimed that because of the lacking transportation infrastructure, many remote cities in Croatia could not be reached. Therefore, there is hardly any tourists who have the opportunity to visit these regions or even know about them. This leads to an imbalance in the economic system, providing that most of the economic activity stemming from tourism is derived from the large tourist destinations, like Dubrovnik, Split, and Zadar. By focusing on projects that would improve the railroads, the extension of the railroads, and even the system of buses throughout Croatia, more tourists would have the opportunity to visit and explore these remote regions.

Croatian tourism is highly seasonal (Croatia Tourism Report 7). The peak seasons run from May-September while shoulder seasons operate from October until April. Most of the economic contributions from tourism occur during peak season. During this peak season, tourists flock to the islands and coastal towns, searching for a paradise or getaway adventure. The problem with seasonality is that it limits the amount of opportunities for tourists who travel during shoulder season. During peak season in Dubrovnik, the weather is hotter, around 100 degrees Fahrenheit, and there are several outdoor activities to undertake. There is a large variety of restaurants and shops as well. However, when shoulder season occurs, all outdoor activities cease and most of the restaurants and shops close down. This limits economic prosperity of Dubrovnik, even though the climate is still mild and warm, about 70-75 degrees Fahrenheit. By eliminating this

concept of seasonality, Dubrovnik, as well as the other regions of Croatia, can continue to employ people, improving the consumer markets. More economic prosperity can occur by allowing tourists the full experience of the city once seasonality is eliminated.

Island tourism allows for an incredible getaway experience for travelers, but because an island is only so big, there are a limited amount of resources that can be utilized to ensure that the island is not disintegrating. "Because of its vast scale and powerful drive, international tourism exhibits an almost inevitable dynamic to overrun a destination's asset base" (Butler 31). Because of the issue of space, there poses a problem of loss of future options including biodiversity, rising sea-levels, and a need for better island resort planning for future generations (Conlin and Baum 23). The idea of "alternative tourism" has been created in response to the idea of New Tourism.

Alternative Tourism focuses on the fragility of an area, responsibility of tourists, and sustainability of the area. Marketing strategies are being created to ensure the sustainability for island tourism by creating segmentation (Conlin and Baum 80). These strategies focus on the amount of tourists who enter the destination, who the tourists are, and these tourist's behaviors. Tourists can be classified into groups: explorers, drifters, independent mass-organized, and mass-organized tourists (Cohen 22). Each of these different groups will treat the destination in a different manner. By controlling the type of tourists who enter an island, sustainability can be better maintained.

Another issue presented throughout many of the tourist destinations in Croatia, with Dubrovnik as an exception, is the lack of foreign language alternatives at tourist attractions. In order for tourists to want to come back, their experience the first time has to be enjoyable and memorable. However, through various cities, there is a severe lack of a second language, other than Croatian,

offered for tourists. This is an aspect that deters tourists from a destination. If they cannot understand the history behind the attraction, how are they supposed to enjoy it? Throughout Europe, English is the number one language utilized as a second language for tourists. However, in Croatia, tourists who speak English natively are not among the top ten groups of tourists (Galičić 92). However, by accommodating the tourists in the list of top ten countries by offering them their native language, tourist rate would increase. Below is a chart of countries who have the most tourists in Europe:

Table 2: Countries by international tourist arrivals and international receipts in 2013

| Rank | Country | International Tourist Arrivals (mln) | % | Rank | Country | International Tourism Receipts (mln \$) | % |
|------------|----------------|--------------------------------------|------------|------------|----------------|---|------------|
| 1. | France | 83.013 | 15.5 | 1. | Spain | 60,435 | 12.4 |
| 2. | Spain | 60.601 | 10.8 | 2. | France | 56,098 | 11.5 |
| 3. | Italy | 47.404 | 8.5 | 3. | Italy | 43,912 | 9.0 |
| 4. | Turkey | 37.795 | 6.7 | 4. | Germany | 41,211 | 8.4 |
| 5. | Germany | 31.545 | 5.6 | 5. | United Kingdom | 40,597 | 8.3 |
| 6. | United Kingdom | 31.169 | 5.5 | 6. | Turkey | 27,997 | 5.7 |
| 7. | Austria | 24.813 | 4.4 | 7. | Austria | 20,106 | 4.1 |
| 8. | Ukraine | 24.671 | 4.4 | 8. | Switzerland | 16,547 | 3.4 |
| 9. | Greece | 17.923 | 3.2 | 9. | Greece | 15,930 | 3.3 |
| 10. | Poland | 15.845 | 2.8 | 10. | Netherlands | 15,580 | 3.2 |
| 11. | Netherlands | 12.797 | 2.3 | 11. | Belgium | 13,500 | 2.8 |
| 12. | Croatia | 10.955 | 1.9 | 12. | Portugal | 12,284 | 2.5 |
| | | | | 13. | Sweden | 11,485 | 2.3 |
| | | | | 14. | Poland | 10,938 | 2.2 |
| | | | | 15. | Croatia | 9,555 | 2.0 |

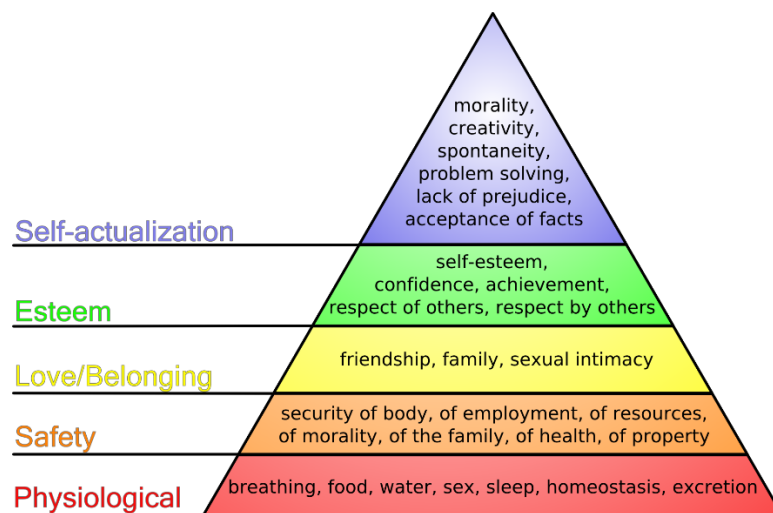
Source: UNWTO highlights 2014, www.unwto.org

Because tourism is a large industry made up of smaller industries, like transportation, gastronomy, attractions, economics, etc., the idea of tourism itself is an interdisciplinary idea conjoined with subjects such as government and politics, economics, cultural identity, and technological advances.

Homogenization:

Tourism and psychology work interdisciplinary with one another. Tourism marketing thrives off of the psychological needs and wants of travelers. Without travelers wanting to visit a destination, there would be no tourism. Motivation is the idea that the body has needs that need to be met, and the body will prioritize itself in order to complete these needs. This need then becomes a motive when it is aroused by a specific and sufficient level of intensity. Because of the tension, the body has a desire to release this tension, thus creating an action of motivation (Kotler, Bowen, and Makens 170).

Maslow's Theory of Motivation sought to explain why people are driven by particular needs at particular times. Therefore, Maslow explained this by stating that human needs are based in a hierarchy.



Finkelstein, J. (2011). Maslow's hierarchy of needs [diagram]

Motivations for travelers are different amongst one another. One traveler might enjoy the psychological thrill of hiking or outdoor sports, therefore he or she would decide to travel somewhere with the opportunities in which to endeavor. There may be travelers who have an interest in history or art, therefore he or she will be more motivated to travel to a region with

historical and/or artistic significance. Because motivation is segmented as psychological, it is difficult for marketers to appeal to all travelers equally based on their motivations. A well-rounded and well-marketed destination would have several different options of attractions, things to do and see, food, accommodations, etc., because every travelers will have his or her own preference.

Motivation is introduced coerced with the idea of cultural homogeny and globalization.

Homogenization can be advantageous to a destination but it can also be detrimental. Arjun Appadurai claims that, "the globalization of culture is not the same as its homogenization, but globalization involves the use of a variety of instruments of homogenization" (334).

Homogenization can be seen as a result of an increase in globalization, and every culture would define globalization differently. However, globalization is also moving in the direction toward homogeneity—the idea that cultures would all be similar, sharing the same form of politics and government structures and business styles (Muir 54). Because globalization is also seen as being defined as westernization, there is a negative connotation attached with performing homogenization on destinations. Homogenization strives to make destinations more westernized like destinations like London and Paris that many tourists visit a year. Homogenization has helped increase the overall GDP of countries like England and France due to the many tourists who share the same motivations to travel there. However, with destination marketing an management, homogenization should be done in small bits. Too much homogenization within a destination can be detrimental to the cultural identity of a state.

Due to homogenization, there is an increase of tourism in Croatia's coastal town of Dubrovnik because of the idea of film tourism. "Film tourism is a growing phenomenon worldwide, fueled

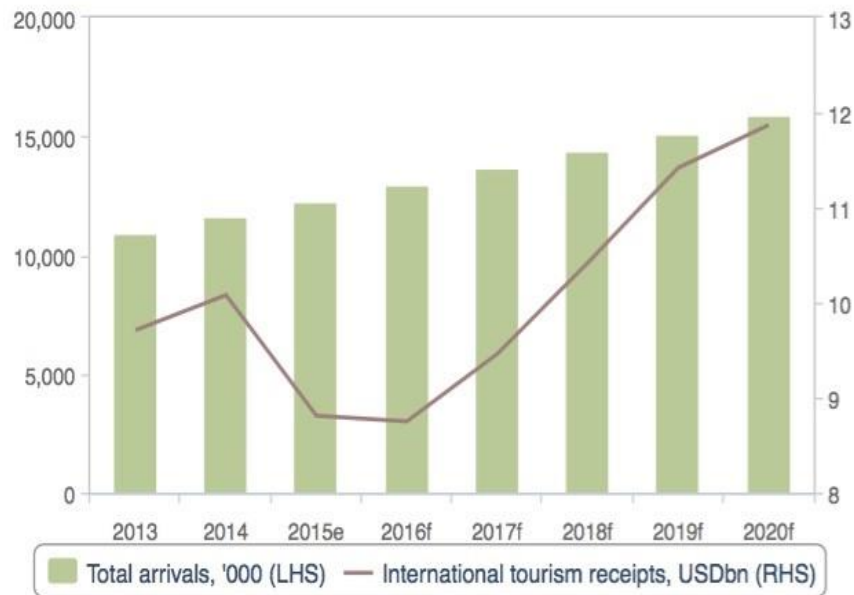
by both the growth of the entertainment industry and the increase in international travel" (Hudson and Ritchie 387). Film tourism has created a huge influx of tourism for Dubrovnik due to the HBO series *Game of Thrones*. However, because so many tourists hold that same motivation for only wanting to travel to Dubrovnik in order to visit the sites of filming, it has decreased the number of tourists who have the motivation to travel for the culture and old architecture. The homogenization of Dubrovnik as an international tourist destination has helped to increase economic prosperity within the city, but the Croatian Tourism Board has to focus on interdisciplinary marketing structures in order to deter away from the negative consequences of cultural homogenization in Dubrovnik as a destination. There is one difficult factor with growing Dubrovnik as a prominent tourist destination with homogeneity. Because Croatia was a state of the former communist nation of Yugoslavia, Croatia still struggles to find its national identity sixteen years later. Cultural homogenization of Croatia cannot fully work properly without negative consequences until a large portion of the Croatian citizens can clearly identify themselves as Croatians and define Croatian culture. The government and tourism work interdisciplinarily with homogenization in order to ensure that most destinations within the given state are not overcome with a westernized definition of homogenization and that cultural identity is still prevalent.

Projected Tourist Numbers:

With current developments underway, the Croatia Tourist Board released projected numbers of tourists from 2013-2020.

Tourist Arrivals & International Tourism Receipts

(2013-2020)



e/f = BMI estimate/forecast. Source: National sources, BMI

The Croatian Tourism Report claims:

"Extending the reach of tourism beyond the traditional school holiday months, including developing cities as weekend break destinations (similar to regional competitors including Prague or Budapest), would help to ensure continued growth in the tourism industry and mitigate the effect of seasonal spending fluctuations. Government investment in this area means we expect to see continued growth in tourism arrivals beyond the end of the current forecast period" (9).

The Croatian National Tourist Board projected numbers from regions as well. By doing this, the Croatian National Tourist Board can create marketing strategies for countries with lower inbound tourist rates.

| Table: Inbound Tourism (Croatia 2013-2020) | | | | | | | | |
|---|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 2013 | 2014 | 2015e | 2016f | 2017f | 2018f | 2019f | 2020f |
| Total arrivals, '000 | 10,948.00 | 11,623.00 | 12,275.94 | 12,973.16 | 13,684.09 | 14,414.60 | 15,146.52 | 15,877.45 |
| Total arrivals, '000, % y-o-y | 5.6 | 6.2 | 5.6 | 5.7 | 5.5 | 5.3 | 5.1 | 4.8 |
| Arrivals by region, Africa, '000 | 10.00 | 9.29 | 10.16 | 11.10 | 12.04 | 12.98 | 13.96 | 15.10 |
| Arrivals by region, Africa, '000, % y-o-y | 25.0 | -7.1 | 9.4 | 9.3 | 8.4 | 7.9 | 7.5 | 8.2 |
| Arrivals by region, North America, '000 | 286.00 | 333.41 | 386.70 | 449.67 | 522.79 | 607.07 | 703.11 | 815.35 |
| Arrivals by region, North America, % y-o-y | 24.9 | 16.6 | 16.0 | 16.3 | 16.3 | 16.1 | 15.8 | 16.0 |
| Arrivals by region, Latin America, '000 | 60.00 | 60.28 | 72.03 | 83.42 | 93.47 | 101.74 | 107.85 | 113.35 |
| Arrivals by region, Latin America, % y-o-y | 81.8 | 0.5 | 19.5 | 15.8 | 12.1 | 8.9 | 6.0 | 5.1 |
| Arrivals by region, Asia Pacific, '000 | 551.00 | 770.49 | 939.04 | 1,105.69 | 1,281.47 | 1,453.55 | 1,605.59 | 1,718.88 |
| Arrivals by region, Asia Pacific, % y-o-y | 0.9 | 39.8 | 21.9 | 17.8 | 15.9 | 13.4 | 10.5 | 7.1 |
| Arrivals by region, Europe, '000 | 9,797.00 | 10,149.30 | 10,551.82 | 10,990.19 | 11,423.90 | 11,870.99 | 12,329.77 | 12,810.31 |
| Arrivals by region, Europe, % y-o-y | 4.8 | 3.6 | 4.0 | 4.2 | 4.0 | 3.9 | 3.9 | 3.9 |
| Arrivals by region, Middle East, '000 | 37.00 | 36.75 | 37.76 | 38.62 | 39.44 | 40.22 | 41.02 | 41.88 |
| Arrivals by region, Middle East, % y-o-y | 2.8 | -0.7 | 2.8 | 2.3 | 2.1 | 2.0 | 2.0 | 2.1 |

e/f = BMI estimate/forecast. Source: National sources, BMI

eTourism as Development and Innovation:

eTourism is a development created over the last decade as the world turns to a more technological focus. There are four ways in which eTourism is categorized: back office

(accounting and management), operations (booking, reservations, confirmations, etc), promotion/marketing/sale (search engines, banners, links, etc), and communication on site and on the Internet (text, audio, images, video) (Fuchs 72). There are also different subjects in which to focus—the destination itself, the attractions, hospitality, food, etc. Therefore, each marketing strategy must be different. Even though eTourism is evolving, there are problems that still persist and are developing daily. Quality is one of the main issues. If the quality of the website or app is not appealing, people will not want to book something or find interest in the destination. Another issue is cost. Many small operators cannot afford to hire professional companies to improve or even set up a website or app that is appealing and usable. The scope proves to be another obstacle. A company must have an audience in which to appeal. This means having multiple languages for accessibility. Often times companies do not put in the effort to transform their website or app to accommodate for international viewers. Because technology is constantly evolving, it is difficult to focus on one form of media communication. One of the most prominent is the use of a cell phone (Fuchs 73). eTourism in the past few years has flourished, and a main focus is on producing apps that include offline maps, direct hotel bookings, flight bookings, as well as checking in and tracking flights. In order for Croatia to utilize this idea of eTourism, they need to start at the main infrastructure of technology. By improving the overall technology in Croatia, more developments can be made and at a quicker pace. Through many more innovations, focusing on the marketing and advertising of a destination, eliminating seasonality, and focusing on sustainability, Croatia is projected to rise as a prominent tourist destination.

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