

# Tourism Development in Croatia – A Qualitative Study to Capture Perceptions and Current Challenges in the Tourism Industry

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*Despite structural problems, Croatia indicates further expansion. The trend of increasing GDP has continued in recent years. The tourism sector significantly contributes to this development. To give a more detailed insight into this, the authors spoke to tourism industry officials to obtain their assessment and experiences via expert interviews. The methodological approach chosen from qualitative social research aims to identify future challenges, strengths and weaknesses for the Croatian tourism sector and to make recommendations. Preliminary results seem to suggest that, despite the increased tourist numbers, there is doubt as to whether Croatia's tourism industry will be able to stay competitive with other countries in the future. Clear strategic planning is one of the weaknesses of economic indicators, such as a lack of qualified personnel or tax policy imbalances. The work aims to provide a contribution to the empirical research of Croatian tourism and to advance findings in the geospatial field of future challenges. Sustainability aspects also play an important role in making the country fit for the future.*

*Keywords: Croatia, tourism industry, tourism policies, future expectations and risks, expert interview*

## INTRODUCTION

### Topical Introduction and Status Quo

Croatia is a popular tourist destination, and not just since and because of winning the Vice-World Football Championship in 2018. A sober look at the related figures from the International Monetary Fund (IMF) reveals an obvious trend: Croatia indicates further expansion. In recent years, GDP has risen steadily and, at first sight, has made a pleasing picture. Over the next five years, the forecasts of the IMF even intend Croatia to grow faster than Germany, the “heavyweight” member of the European Union (IMF, 2019). If you look at the increased number of overnight stays and the number of tourists in Croatia in the last five years (Tourism Ministry of the Republic of Croatia, 2019), it is obvious: Tourism is proven as a means of promoting economic growth and makes a big contribution to the GDP.

But this must not hide the fact that the country is exposed to a few structural problems:

- the largest trading company in the country – former Agrokor Group with 40,000 jobs and >15% of GDP - undergoes a major restructuring process (Klepo, Bićanić, and Ivanković, 2017),
- the Uljanik shipyard in Pula has been declared bankrupt in the meantime (Laušić, 2018),
- the national debt of the country has been rising for years – now: 75% (2005: 38%, 2010: 43%, 2015: 85%) (IMF, 2019),
- the unemployment rate only just into the double-digit percentage range (IMF 2019), and

- the average wage is far below the EU average – gross hourly earning < 5 EUR compared to EU-28: 13 EUR (Eurostat, 2017).

Looking at these key figures evokes questions. So, the tourism sector is in great demand as it is characterised as the main supporting pillar of future growth (to dampen the difficulties above). A deeper investigation of the Croatian tourism situation is therefore essential.

In order to provide a more detailed insight into the correlation between tourism and GDP, the authors talked to tourism industry officials to obtain their personal assessment and experiences by using expert interviews.

Further problems to discuss are:

- Is this a country that rests on its tourism laurels?
- What do the experts think regarding this question and future challenges?

As an extended introduction, it should not go unmentioned that the reference country Croatia is not only shown in an isolated space, but that the study also offers comparative features. Different countries were discussed, which deserve to be categorised as holiday destinations and offer links of various types to the reference country. This also qualifies the view of Delhey and Kohler, whose statements are presented in a context-sensitive manner. Specifically, in the sense that the focus on certain model societies often has historical and cultural reasons (Delhey/Kohler, 2006: 354). The neighbouring and holiday country Montenegro could be considered as a reference country because of its similar climatic conditions and culture. Hungary could be used as a benchmark for historical reasons with regard to the former union of states and the subsequent division of sovereignty, with Balaton being a popular destination for international tourists. For most European countries, Spain for example, is the reference country in the competition for tourists.

For the introductory context, however, Germany is of interest to the authors as a reference country. Germany is becoming increasingly popular as a travel destination for international tourists, especially since the German tourism industry has been one of the most flourishing and highest-turnover sectors of the economy for years (for details see Federal Ministry of Economics and Energy, BMWi, 2017). Nonetheless, we chose Germany as the reference country because of its economic stability, as it is the largest economy in the European Union, since the focus is on the comparison of GDP indicators. Here, Germany is traditionally considered the “leader” or “benchmark country” (Chapsa et al., 2014, 22).

## Research Question

Discussions concerning the competitiveness and future sustainability of the Croatian tourism sector are certainly not new. The authors want to deepen them. Reflecting on the above object of investigation, the research-leading question is articulated as follows: *What does a sober look at the tourism situation in Croatia look like, how do experts judge it and what challenges have to be mastered in the future?*

The experts were selected through personal and professional contacts. They are based in the tourism industry. In principle, expert knowledge is not necessarily associated with a status, profession or even “prominent position” within a company or organisation (Gläser, Laudel, 2010, 10f.). However, one can generally assume that questions, including our research question, which deal with the future development of an industry, are always of a strategic character. Positions at higher hierarchical levels are more likely to be involved in such issues than employees in the operative area or lower hierarchical levels. As a result, we have specifically focused on interview partners from the management level.

In this context, we would like to briefly point out that the possible questioning of other market participants, for example tourism managers abroad or management consultants, would probably also have led to interesting findings. However, we deliberately did not carry this out, as the depth of knowledge of the Croatian market in the first case tends to be lower than that of local industry representatives. In the second case mentioned, we assumed that their expert knowledge would ultimately also be based on surveys, so that we want to refer to primary sources or surveys in our work independently.

The data collection or sampling was targeted (“purposive sampling”), since the aim was to obtain “important information for answering the research question.” (Truschkat et al., 2011, 362). The aim was to gather as much information as possible in order to identify factors that point the way forward. The

“customer” proximity, with the associated feedback, is the key criterion for us. To put it simply, tourism managers have the practical background and are most likely to know how their industry “ticks” and are also familiar with the specifics of their industry.

### Methodological Approach

The research question will be further investigated in the expert interviews in chapter 3. In addition to the statistical analysis (particularly the comparison of economic key figures of different countries) and the literature analysis, the future competitiveness of Croatia is critically examined in an essential step through guide-based interviews with 10 experts. The experts were asked how they assessed the current situation in the Croatian tourism sector. Furthermore, their own suggestions for improvements in the future were noted.

During the survey or research process we followed the theoretical sampling (Glaser/Strauss, 1967/2005), with regard to the number of interview partners. Here, data collection and analysis took place simultaneously, so that the findings of previous interviews were leading to the selection of the next ones. At a certain point, a theoretical “saturation” occurs (Glaser/Strauss, 2005, 69). The sampling is then finished when the further cases and analyses do not provide any new insights (Flick, 2007, 161). Such a saturation point eventually occurred for us after 10 interviews, as the central themes were repeated in the interviewees’ answers.

## ECONOMIC INDICATORS

### GDP

In order to examine the current economic situation of the country in more detail, some economic data have been subjected to a (country) comparison. The following tables and graphs are mainly based on data and documents from the International Monetary Fund and show firstly the Croatian GDP in global comparison (world, emerging market and developing economies, advanced economies and it is also compared to Germany and the USA).

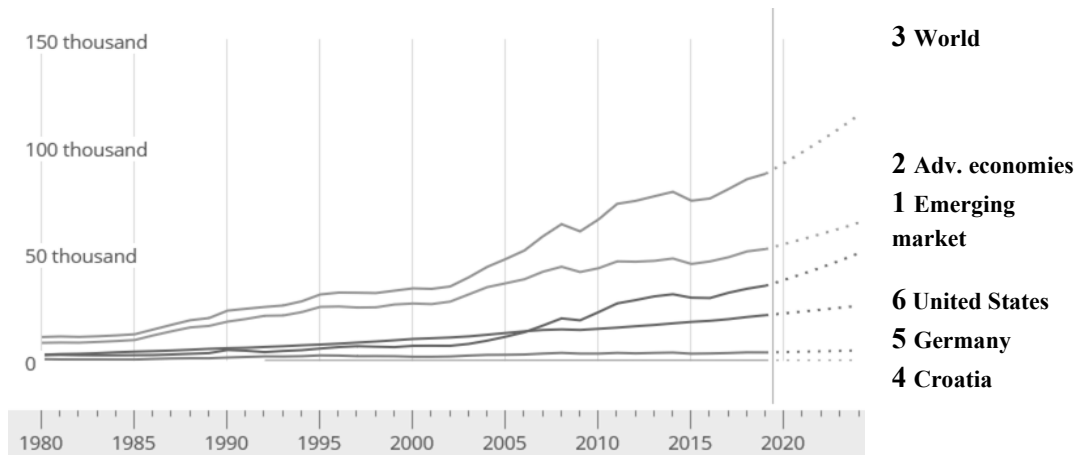
**TABLE 1**  
**GDP-COMPARISON IN BILLION USD**

In billion USD as of	2010	4/2019	2024
1- Emerging market and developing economies	22.78 th.	35.09 th.	50.17 th.
2- Advanced economies	43.25 th.	52.17 th.	64.41 th.
3- World	66.03 th.	87.27 th.	114.58 th.
4- Croatia	59.87 th.	61.25 th.	77.20 th.
5- Germany	3.42 th.	3.96 th.	4.91 th.
6- United States	14.99 th.	21.34 th.	25.3 th.

Notes: th. = thousands

Source: International Monetary Fund, 2019

**FIGURE 1**  
**GRAPHICAL TIMELINE FOR THE DEVELOPMENT OF GDP IN EMERGING MARKET AND DEVELOPING ECONOMIES, ADVANCED ECONOMIES, WORLD, CROATIA, GERMANY AND USA IN THE PERIOD FROM 1980 TO 2024 (IN BILLION USD)**

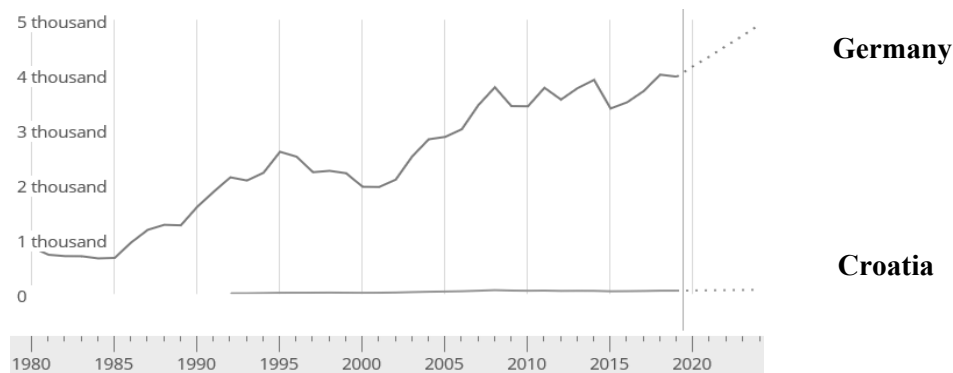


Source: International Monetary Fund, 2019

What does this comparison express? Evidently, and according to the IMF, the country expects eight times more growth in the next five years than in the last nine years. Between the lines, high expectations are attached to the small country. Such an expectation cannot be recognised in any of the other illustrated comparative countries or groups of countries.

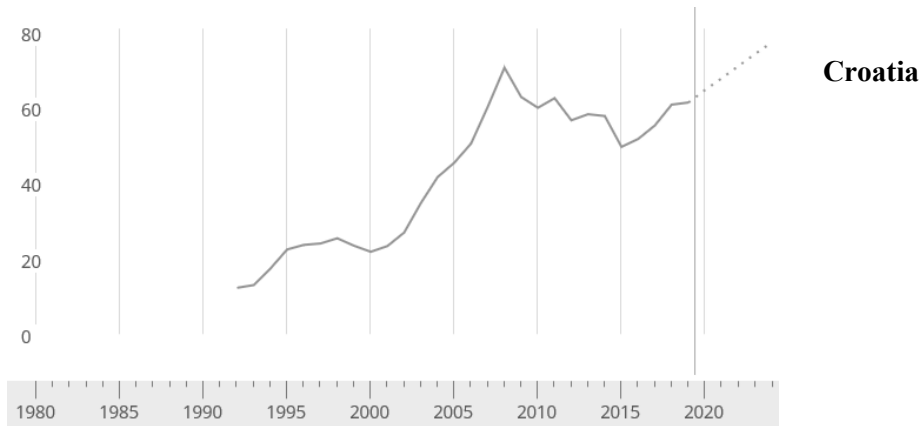
A further comparison can be clearly evident in the following graphs, in which historical, as well as future data, between the small Croatia and the EU heavyweight Germany are more intensively illustrated.

**FIGURE 2**  
**GRAPHICAL TIMELINE FOR THE DEVELOPMENT OF GDP IN GERMANY AND CROATIA IN THE PERIOD FROM 1980 TO 2024 (IN BILLION USD)**



Source: International Monetary Fund, 2019

**FIGURE 3**  
**GRAPHICAL TIMELINE FOR THE DEVELOPMENT OF GDP IN CROATIA, IN THE PERIOD FROM 1992 TO 2024 (IN BILLION USD)**



Source: International Monetary Fund, 2019

The graphs clearly illustrate that the small country has to compete with the big ones in terms of its development and future expectations. After the Subprime Crisis, the GDP in Germany suffered slightly and fell by 1.2% between 2010 and 2015, before rising by 17.2% until April 2019. For Croatia, it looked more dramatic. GDP fell by 17.3% from 2010 to 2015 but increased disproportionately by 23.7% from 2015 to April 2019. In the future forecasts too, the Croatian expectations exceed the German ones (April 2019 to 2024: +26.0% vs. +24.0%).

**Population**

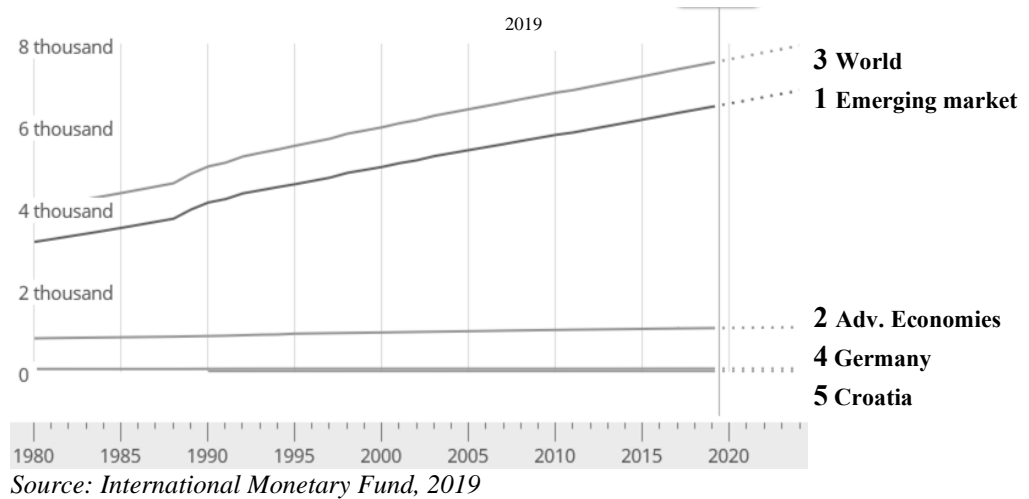
**TABLE 2**  
**POPULATION-COMPARISON FROM VARIOUS GROUPS (IN M. OF PEOPLE)**

Millions of people	as of April 2019	2024
1. Emerging market and developing economies	6.47 m.	6.86 m.
2. Advanced economies	1.07 m.	1.09 m.
3. World	7.54 m.	796 m.
4. Germany	82.95 m.	82.69 m.
5. Croatia	4.07 m.	3.93 m.

Notes: m. =millions

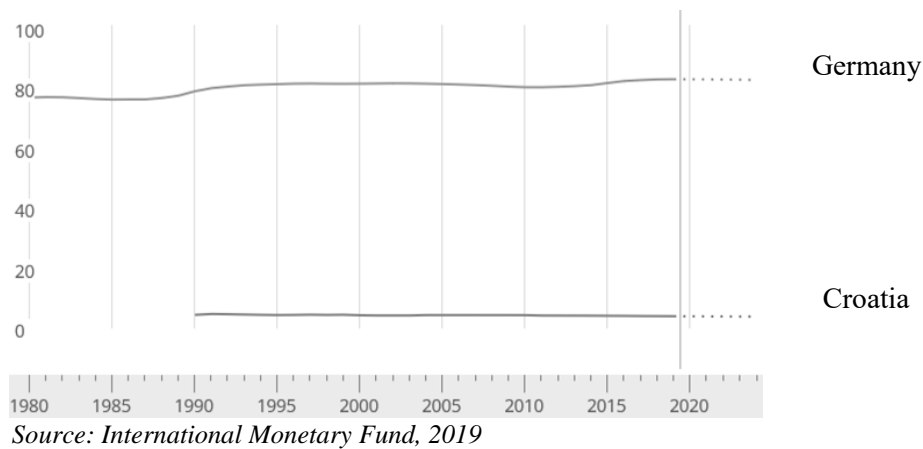
Source: International Monetary Fund, 2019

**FIGURE 4**  
**GRAPHICAL TIMELINE FOR THE DEVELOPMENT OF POPULATION IN THE PERIOD**  
**FROM 1980 TO 2024 IN MILLIONS OF PEOPLE**

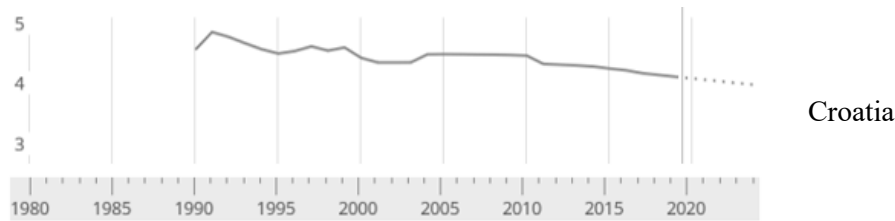


The comparison of the data and (following) graphics impressively illustrates how contrarily the future prognoses of populations can degenerate. While the first three groups are all associated with rising and Germany with stable forecasts, the Croatian population trend is retroactive. It should not be forgotten that, in the previous GDP graph, the Croatian curve is reciprocally based on a rising trend in the future.

**FIGURE 5**  
**GRAPHICAL TIMELINE FOR THE DEVELOPMENT OF POPULATIONS OF GERMANY**  
**AND CROATIA IN THE PERIOD FROM 1980 TO 2024 (IN MILLIONS OF PEOPLE)**



**FIGURE 6**  
**GRAPHICAL TIMELINE FOR THE DEVELOPMENT OF POPULATION OF CROATIA IN**  
**THE PERIOD FROM 1980 TO 2024 (IN MILLIONS OF PEOPLE)**



*Source: International Monetary Fund, 2019*

Both these graphics show the past and future development in a transparent and characteristic way; a stable population in Germany, with simultaneous loss of people in Croatia (despite the ambitious growth targets of the country). The population of Germany increases by 3.3% from 2010 to 2020 and that of Croatia decreases by 8.6%. Here, it is made clear between the lines that the country offers too little incentive for the current inhabitants to remain loyal to the country permanently.

**GDP per Capita**

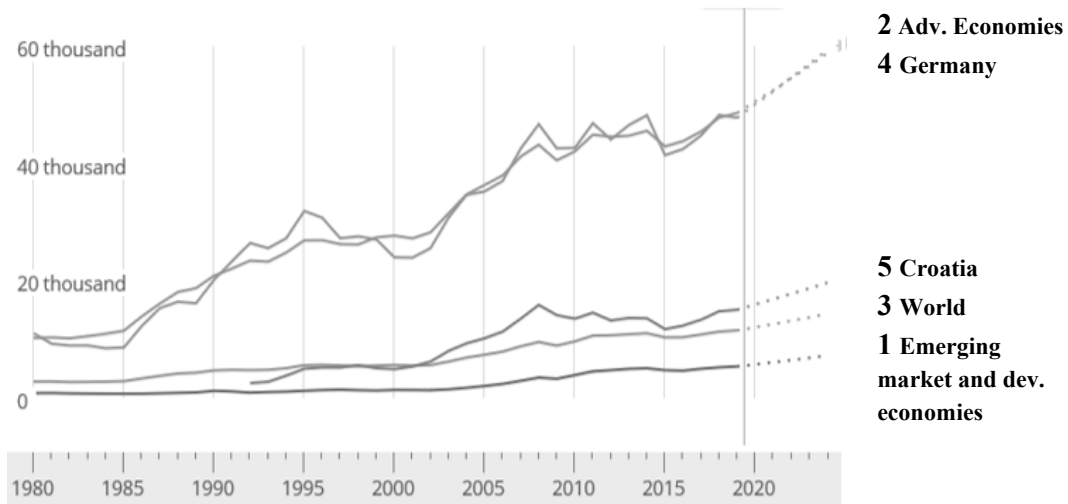
**TABLE 3**  
**GDP PER CAPITA - COMPARISON FROM VARIOUS GROUPS (IN USD)**

In USD as of	2010.	2015.	4/2019.	2024.
1. Emerging market and developing economies	3.94 th.	4.79 th.	5.42 th.	7.31 th.
2. Advanced economies	42.06 th.	42.89 th.	48.61 th.	58.83 th.
3. World	9.69 th.	10.36 th.	11.57 th.	14.39 th.
4. Germany	42.64 th.	41.42 th.	47.79 th.	59.41 th.
5. Croatia	13.55 th.	11.78 th.	15.06 th.	19.66 th.

*Notes: th. = thousands*

*Source: International Monetary Fund, 2019*

**FIGURE 7**  
**GRAPHICAL TIMELINE FOR THE DEVELOPMENT OF GDP PER CAPITA OF THE**  
**GROUPS MENTIONED ABOVE IN THE PERIOD FROM 1980 TO 2024 (IN USD)**

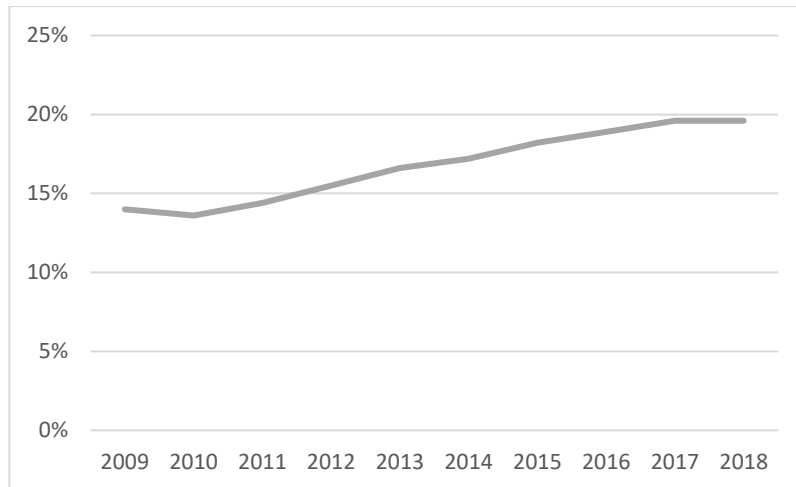


Source: International Monetary Fund, 2019

Visually, this is the only image in which the trend of all curves is correlated, or at least similar. It can even be seen that Croatia is on an above-average course here.

**Tourism Share, Number of Tourists and Overnight Stays**

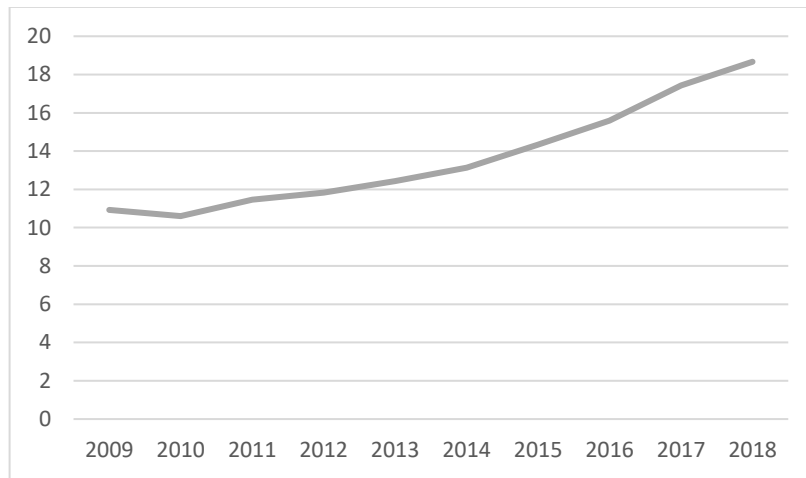
**FIGURE 8**  
**DEVELOPMENT OF TOURISM SHARE IN GDP OVER TIME (IN %)**



Source: Tourism Ministry of the Republic of Croatia, 2010-2019

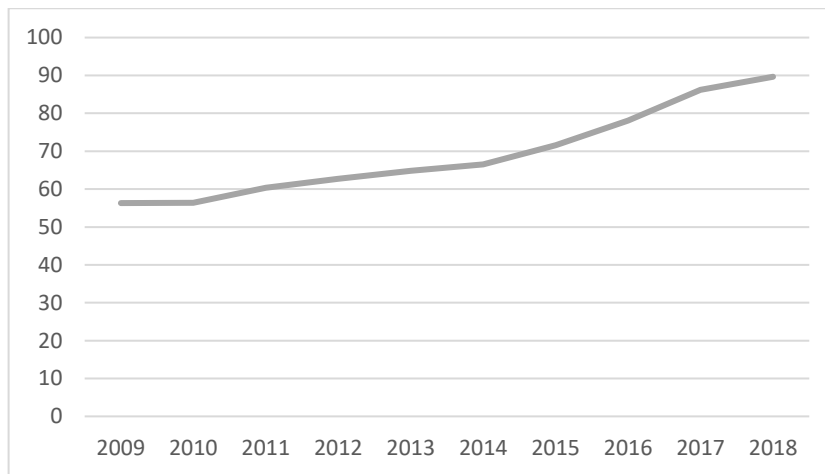


**FIGURE 9**  
**NUMBER OF TOURISTS OVER TIME (IN MILLIONS, INCLUDING PRIVATE AND BUSINESS AS WELL AS FOREIGN AND DOMESTIC)**



*Source: Tourism Ministry of the Republic of Croatia, 2010-2019*

**FIGURE 10**  
**NUMBER OF OVERNIGHT STAYS OVER TIME (IN MILLIONS, INCLUDING PRIVATE AND BUSINESS AS WELL AS FOREIGN AND DOMESTIC)**



*Source: Croatian Bureau of Statistics, 2019*

All three graphs clearly prove that tourism in Croatia is developing in the direction of an economic miracle. They correlate with each other and show the same inclination.

**Shares of GDP-Development**

This subchapter deals with domestic distribution in the context of GDP. Due to the tourist trend statements and developments illustrated in the previous chapters, there should be no over-dimensioned surprise findings if one looks at the temporal track of the GDP components in detail.

The following survey is part of a study by the University of Zagreb, which impressively demonstrates how the services sector (especially the tourism value chain) has grown in the last 20 years.

**TABLE 4**  
**TRANSLATED VERSION OF TABLE 4 INCLUDING COMBINED PROPORTIONS AND**  
**THEIR DEVELOPMENT (IN %)**

	1989	2008	2018
<b>Agriculture, forestry and fishing</b>	12.1	4.7	3.0
<b>Manufacturing and extraction</b>	37.8	16.2	15.5
<b>Construction</b>	5.3	7.2	4.2
<b>Trade, transport and warehouses, lodging and food</b>	14.1	18.6	20.5
<b>Information and communications</b>	1.5	4.1	3.8
<b>Financial and insurance activities</b>	0.8	5.4	5.5
<b>Real estate business</b>	3.6	7.7	8.5
<b>Professional, scientific and support activities</b>	5.7	7.2	7.0
<b>Public administration and defence, education, health care and social care</b>	9.8	11.9	12.5
<b>Other service activities</b>	1.8	2.4	2.5
<b>Product taxes minus subsidies on products</b>	7.5	14.6	17.0
<b>Gross domestic product, GDP</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

<b>Agriculture</b>	> 10%	< 5%	3%
<b>Industry</b>	> 40%	< 25%	< 20%
<b>Service</b>	< 40%	≈ 60%	> 60%

Notes: GDP = gross domestic product

Source: Author's own calculation (based on Domazet, T., 2018)

When you look at the graphics, little can be added. It almost creates a cautious impression of how the previously important agricultural and industrial sectors are now visibly affected. How the development of tourism performance is judged by experts will be questioned in the next chapters. It will become apparent during the course of the study that the tourism sector could be the saviour in distress.

## INVESTIGATIONS PROCEDURE

### Problem Solving Process

This chapter examines the extent to which the first findings and impressions in the previous chapters are reflected in the opinions of experts. In addition, the survey of the industry experts offers the opportunity to obtain estimates that were not, or were only insufficiently available in the literature (magazines, monographs, Internet sources). This considers e.g., the question of the country's current position.

### Choice of the Method/Research Design

The following explanation of the research design follows a transparent presentation of how the respective empirical data was collected and analysed and how the empirical research interest was answered. This includes sketching in each case the survey method, the procedure and the evaluation method in a short form.

The choice of the survey method fell to the non-standard interview, which belongs to the field of qualitative social research. In this interview form, neither the questions nor the answers of the interview

partner are standardised. The subtype Guide interview focuses on a given topic and on a list of questions, the guide. In the question formulations and the sequence of questions, however, there is no liability, and it allows the interview partners as natural a conversation as possible (Gläser and Laudel, 2010). The guideline is intended to ensure that all relevant aspects of the research subject are addressed.

With the support of such guideline interviews, selected experts on the topic were consulted and directly interviewed for this work. The term “expert” is to be understood in the sense of a group of persons who have a special knowledge in the sought-after matter and pass it on request (Gläser and Laudel, 2010; Przyborski and Wohlrab-Sahr, 2009).

Guided interviews can be in person, by phone or in writing. For this investigation, the interviews were conducted partly in person, partly by telephone or by e-mail and recorded with the agreement of the interview partners using a digital recording device.

### **Chosen Circle**

The classification into an “expert” group was based in particular on the basic idea that the interviewee should either have many years of responsible management experience in the hotel or tourism sector, or the person has been working in the tourism higher education sector for many years. In context with the expert interview, we understand a 10-year rule - as a central element of expert competence - according to which it takes about 10 years of experience to acquire expert competence. The average professional experience (including work in the tourism industry) of the interviewees was well over 10 years. Furthermore, the respective positions (management) underpin the high requirement profile which is generally indicated by correspondingly long and relevant professional experience.

For the type and quality of information obtained through empirical research, the choice of interviewees is an elementary influencing factor. For the present work, it was therefore relevant to examine the topic, not only from purely technical expertise, but also from the perspective of all main regions of Croatia: Dalmatia, Istria, Slavonia and Zagorje. The consideration of all these main regions should not lead to an unbalanced result.

The profiles of the respondents are as follows:

- the chosen experts are mainly long-time executives in the tourism sector,
- have academic and high professional backgrounds,
- have an average of 20 years of experience in the tourism field (theory and practice) per person,
- have an overall achievement of over 500,000 overnight stays annually,
- essentially directors of hotels and Croatian tourist national boards, professors in tourism, President of County Chamber of Commerce and, furthermore, one university chair holder, and
- eight persons interviewed in the coastal cities and two in the inland area of the country.

Another criterion for selection was the time availability of the experts during the study period and their willingness to cooperate in this research project.

### **Interview Questions**

For the purposes of this research, the authors perceived it necessary to ask different experts the same questions in order to compare different opinions and answers in a meaningful way.

Before conducting the interviews, it had to be clarified who should be included as an expert. The interviewer deliberately selected the participants, as they were known to him and had relevant knowledge about individual aspects of the subject matter. A random sample of the interview partners would, therefore, have made little sense. In this respect, certain persons were to be interviewed, since they could be assessed as particularly relevant and capable of providing information based on their own insights into the subject of the study.

In the first half of the questionnaire, care was taken to ensure that an adequate presentation of the experts was guaranteed. The second half of the questionnaire focused on the operationalisation of the research subject (Gläser and Laudel, 2010). It was emphasised that the questions were open, neutral, simple and clearly formulated (Gläser and Laudel, 2010). Although it was reasonable to suppose that the experts

to be interviewed would all have only a short time for such an interview, no time limit was set for the purposes of loosening up the interview situation. Relevant literature suggests that between eight and fifteen questions are required to answer such a complex topic (Gläser and Laudel, 2010). Accordingly, the interview guide consisted of thirteen questions.

The guide began with introductory questions for the purposes of presenting the interlocutors, which allowed a more relaxed mood in the beginning. In addition to the name, position and company, this also included professional experience, along with tourist key figures.

**TABLE 5  
INTRODUCTORY QUESTIONS OF THE GUIDE INTERVIEW**

1	First let us know something about you; what is your name, academic background, position held and company?
2	How many years of experience do you have in the field of tourism?
3	3. How many tourist capacities does your company run?
4	How many overnight stays does your company achieve/sell and where are the majority of guests from (country)?
5	What means of transport do the majority of guests arrive by?

*Source: Author's own guide interview creation*

Hereafter follows a section with questions about the contents sought and goals of the tourism object of investigation. In addition to the current practical relevance of the topic, and including ideas of competition with other countries, respondents were asked what points they would like to change in the future in terms of the tourism situation in Croatia.

**TABLE 6  
PROFESSIONAL ORIENTED QUESTIONS OF THE GUIDE INTERVIEW**

6	In your opinion, what factors contribute to the increase in Croatian tourism (e.g., number of guests, income, overnight stays)?
7	What do you think is the advantage of your country in relation to other countries in the Adriatic region?
8	Can you categorise the expectations of your guests, i.e., which service that you offer is their favourite one?
9	Are you satisfied with the government's long-term tourist strategy for Croatia?
10	If you had the power to change three things in the tourism sector, what would they be?
11	To what extent does tourism infrastructure meet the needs of tourism development?
12	To what extent is the price of tourist services influenced by the number of guests and their consumption, and how is their relationship compared to competing tourist destinations?
13	To what extent does the lack of labour in Croatia affect the level of tourism services and the development of tourism? Are the relevant workers in tourism adequately trained to achieve a high level of services and tourism development?

*Source: Author's own guide interview creation*

## MAIN RESULTS

### Preliminary Explanation of the Result Evaluations

For a detailed evaluation of the interview results, the literal transcription was selected. This elaborate method is particularly suitable for relieving the interviewer from logging during the interview and concentrating fully on the leadership of the interview (Mayring, 2002; Gläser and Laudel, 2010). The

interviews were recorded using a digital recording device, depending on the approval and the meeting of the interviewees.

In the subsequent transcription of the interviews, standard orthography was chosen. Speech pauses, non-verbal utterances such as throat clearing, stuttering and filler words in the transcription were ignored and partially adjusted in the way that the sentence structure was smoothed, and the Font English was adjusted. Similarly, introductory words, interview explanations, or small talk at the beginning and end of the interviews were not transcribed for capacity reasons and lack of relevance to the content of the interview.

The qualitative survey method, used conscientiously, follows the principle of openness. This produces a significant amount of blurred, raw data to be evaluated (Gläser and Laudel, 2010). Therefore, a suitable qualitative evaluation method must be chosen. The chosen method of qualitative content analysis enables an evaluation of complex material in a systematic and methodically controlled manner, without freely interpreting it or losing information through rigid systematisation, such as in quantitative content analysis (Mayring, 2002). Following a systematic procedure, the texts were extracted from information that was then assigned to a category system and further processed independently of the source text (Gläser and Laudel, 2010). In this way, and according to the purpose of the study, the wealth of information was systematically reduced and structured.

The following subchapters focus on the presentation of the results of the expert interviews. These would be used to answer the research question. The presentation of results is based firstly on an antithetic discussion, in the form of positive and negative aspects as well as two analysis techniques according to Mayring:

- Summary: “The aim of the analysis is to reduce the material so that the essential content is retained, to create a manageable corpus through abstraction, which is still an image of the basic material (Mayring, 2003: 58)” and
- Structuring: “The aim of the analysis is to filter certain aspects out of the material, to lay a cross-section through the material according to pre-determined order criteria or to assess the material based on certain criteria (Mayring, 2003: 58).”

In order to give the insights gained an authentic perspective, a list of the interview statements mentioned above was to be incorporated into the presentations. In the process, various parallels were revealed in the main statements, as the following explanations will show.

### **Positive Aspects**

The (first) positive aspects of the investigation could be preceded by the following points, listed according to the number of mentions:

- a) Preserved, untouched nature / Mediterranean natural beauty (10)
- b) Beautiful Adriatic Sea (7)
- c) Domestic and ecologically grown / Mediterranean food (incl. wine) (6)
- d) Heritage tourism (UNESCO) (3)
- e) Preserved culture and religious heritage (2)
- f) General safety (also by entry into the EU) (3)
- g) Constant upgrades in tourism infrastructure (2)

In the following, the above-mentioned positive aspects are explained in detail and in parts by way of example.

### **Explanation of the Survey Results**

a) *Preserved, Untouched Nature / Mediterranean Natural Beauty (10)*

b) *Beautiful Adriatic Sea (7)*

Croatia is widely known for its natural beauty and crystal-clear Adriatic Sea. It is influenced by ideal sea currents and a mild Mediterranean climate. The incredible diversity of the landscape of Croatia will leave a lasting impression on everyone. With its national parks, forests, sea caves and more than a thousand islands, Croatia is truly beautiful.

Also, on various international tourism sites one can find descriptions which position Croatia in the European countries' comparison front. Exemplary statements in a brochure are as follows: "From ancient walled towns to gorgeous beaches framed by sparkling blue waters, there's nothing you can't find in Croatia, a land of great natural beauty and astounding cultural heritage. Although modest in size, the small Central European country abounds in notable historic sites and national parks packed with dense forests, striking waterfalls and unbelievably beautiful lakes. Two such places are the breath-taking Plitvice Lakes and the unique Kornati archipelago, with its 140 pristine islands surrounded by crystal-clear azure seas" (Travel Away, 2019).

*c) Domestic and Ecologically Grown / Mediterranean Food (Incl. Wine) (6)*

What distinguishes Croatia from other European countries are its famous gastronomic delicacies, from fish at the seaside to meat specialties on the continent. Besides standard European cuisine, Croatia also offers its most popular local dishes and specialities. In Dalmatia and Istria, the main dishes are fish and seafood, and in the continental part there are meat specialties.

Not only the beautiful beaches, but the sea and sights are also widely illustrated on tourism websites. There are even separate pages that focus on the various traditional delicacies and are articulated as follows: "As with every country that is culturally, historically and geographically as diverse as Croatia, its cuisine can hardly be pinpointed to only one type. Over the course of time and the historical impact of other nations, a wide range of now-called traditional Croatian dishes developed in different parts of the country. ... The continental cuisine of Croatia, for example, under the influence of the Austrian and Hungarian hegemony, is mostly based on meat dishes and vegetables that are often served in rich and spicy sauces. The traditional coastal cuisine is, on the other hand, mostly based on seafood, domestic olive oil and vegetables like chard. Inevitable condiments that give this Croatian food its unforgettable taste are rosemary, basil and other Mediterranean herbs. Dalmatian and Istrian dishes are not only light and healthy, but also extremely delicious. Although sometimes similar to the cuisine of the neighbouring Mediterranean countries, the coastal cuisine of Croatia has many dishes that are unique only to this geographical region" (Smart Deal d.o.o., 2019).

*d) Heritage Tourism (UNESCO) (3)*

*e) Preserved Culture and Religious Heritage (2)*

As can be seen in the list below, Croatia is a country with numerous cultural and natural heritages under the protection of UNESCO. Croatia has been an equal member of UNESCO since its independence from Yugoslavia on 25<sup>th</sup> June 1991, and its preserved culture and religious heritage were included as such under the UNESCO Statutes. The corresponding universal codification can be found in the conventions on the UNESCO website: "The General Conference of the United Nations Educational, Scientific and Cultural Organisation meeting in Paris from 17 October to 21 November 1972, at its seventeenth session (UNESCO, 2019)."

Below is the corresponding list in Croatia (Croatian National Tourist Board, 2018):

**Cultural**

1. Early Christian Euphrasius Basilica Complex in Poreč (1997)
2. Historic City of Trogir (1997)
3. Historical Complex of Split with the Palace of Diocletian (1979)
4. Dubrovnik Old town (1979, 1994)
5. Stari Grad Plain (2008)
6. Stećci Medieval Tombstone Graveyards (2016)
7. The Cathedral of St James in Šibenik (2000)
8. Venetian Works of Defence between the 16<sup>th</sup> and 17<sup>th</sup> centuries: Stato da Terra – Western Stato da Mar (2017)

## Natural

1. Ancient and Primeval Beech Forests of the Carpathians and Other Regions of Europe (2007, 2011, 2017)
2. The Plitvice Lakes National Park (1979, 2000)

### f) *General Safety (Also by Entry into the EU) (3)*

This point describes another advantage for the country. This can also be seen in the published article by Simmonds. He noted a general lamentation at a high level of the population, but at the same time emphasised the everyday security benefits: “While everyone complains about some aspect of life or another here in Croatia, the reality is that the safety levels are excellent. Your kids can easily be left to play on their own like back in the good old days in other countries, and in many aspects it’s as if time has stood still. The majority of crime here is traffic crime, rarely does anything major occur (Simmonds, 2018).”

### g) *Constant Upgrades in Tourism Infrastructure (2)*

Investments are constantly being made in the development of the infrastructure in the Republic of Croatia. The reason for this is the pronounced seasonality of tourism, when the number of inhabitants in many tourist destinations repeatedly exceeds their number in comparison with the off-season period. The summer months present a major challenge in terms of infrastructure, especially for the cities of Dubrovnik, Split and even the islands. Specifically, major construction projects, partly co-financed by the EU, are in progress here. These include, among others, the construction of the Pelješac Bridge, opening of a new terminal at Zagreb International Airport, reconstruction of the Croatian road network, railway construction and the Clean Water Project (Stout, 2018).

## Negative Aspects and Change Requests

Of course, while a number of positive effects have been found in the study, it is important not to ignore the negative comments and utterances that were mentioned:

- a) Long-term strategy not really recognisable (6)
- b) Current tourism infrastructure (4)
- c) Price/performance ratio questionable (4)
- d) “Sun and Sea” concept not enough for long competitive advantage (2)

## Explanation of the Survey Results

- a) ***Long-term strategy not really recognisable*** - Croatian tourism, primarily in coastal parts, continental part neglected (“dead letters on the paper,” no bureaucratic support of government, from October to March almost no flights) (6)

It is a well-known fact that tourism in Croatia mainly takes place on the coast. Furthermore, the respondents stated that it is no surprise that the authorities have neglected continental Croatia. In addition, statistics show that up to 86% of the total number of overnight stays throughout the year are realised in the summer months.

Therefore, it is not surprising that the biggest Croatian tourism investments are in the Adriatic/coastal area, and not the continental area. (Ćorluka, 2018).

However, one must not forget that the country had to master great challenges due to its recent history and the difficult conditions created by the consequences of the homeland war. In addition, there were insufficient privatisation models that were not always useful for the tourism business. Nevertheless, tourism has managed to establish itself and yet benefit from great foreign interest, as the Ministry of Tourism of the Republic of Croatia has recognised: “... Croatian tourism still managed to show its vitality thanks to the strength and interest of the international market, the attractiveness of the country, and most of all the resilience of tourism as a reaction to occasional global events (Ministry of Tourism of the Republic of Croatia, 2013).”

When it comes to mass tourism, the economic benefits seem to outweigh at first glance “foreign exchange inflows” or “activities of general and special socio-economic interest.” Nonetheless, the negative

aspects which are concretised in attributes such as “seasonal character, spatial concentration and the distribution of tourism,” must not be ignored (Jardešić, 2010). This “problem” must be relativised and channelled. One of the most important factors in measuring tourism success is the measurement of the intensity of tourism seasonality in a given country. The intensity of the seasonality of Croatian tourism is 60% and takes place in three summer months. The following key figures, based on the climatic conditions, cannot be ignored: “As a rule, the tourist offer has a seasonal character, which means that it is not used in the same intensity in all seasons. The basic determinant that characterises individual seasons is the climatic factor which, as a rule, forms the two major tourist seasons” (Pirjanec, 1998).







**b) Current tourism infrastructure** only partially meets the needs of tourism development (change from mass to sustainable tourism is needed, peak season very problematic) (4)

Only the following cited sentence of the Croatian Minister of Tourism meets the above point very aptly: “Reaching 20 million tourists and 100 million nights with our infrastructure is our maximum; Croatia needs to develop the pre- and post- seasons and to raise the quality” (Capelli, 2019). As mentioned in the earlier text, Croatia has announced plans for a new investment in tourism infrastructure, especially in the transport infrastructure (railways, ports and airports), with an amount of 20 billion kunas (2.7 billion euros). The main reasons are the high expectations regarding the quality of tourism offers: “Four and five-star hotels have been key factors to Croatian success, with tourists who are attracted by high levels of quality. According to the Ministry of Tourism, there has been a 70 per cent increase in the number of four and five-star hotels in recent years, while the share of three-star accommodation has been reduced from 42 to 34 per cent” (Patricolo, 2019). Higher quality accommodation, as well as a proper infrastructure, will continue to be in demand in the future, and there is no way around it.

**c) Price/performance ratio questionable** (high prices) - tourists could move to a more competitive destination if the service quality gets worse (e.g., Turkey cheaper) (4)

The following overview impressively underlines, in this six-country comparison, the price-performance ratio of the country in question, in which the price trend of Croatia over other countries is glaringly obvious.

**FIGURE 11  
PRICE/PERFORMANCE RATIO**

ITEMS	 MAJORCA Palma	 SPAIN Costa del Sol	 CYPRUS Paphos	 BULGARIA Sunny Beach	 TURKEY Marmaris	 CROATIA Zadar
14 cups of coffee in a café/bar	£25.59	£14.62	£30.46	£9.74	£12.39	£20.55
7 bottles of local beer	£20.10	£13.16	£13.40	£4.87	£15.49	£15.41
7 glasses of wine	£21.32	£16.20	£15.23	£8.12	£20.65	£21.40
14 colas	£34.11	£18.28	£28.02	£12.99	£12.39	£30.82
14 bottles of water	£7.19	£4.63	£3.29	£5.20	£4.13	£11.99
7 family lunches 2 adults 2 children (no drinks)	£224.18	£194.94	£202.25	£71.45	£92.92	£214.03
7 three-course evening meals for 2 adults and 2 children (including a bottle of wine/soft drinks)	£475.15	£382.56	£404.49	£210.46	£322.11	£630.09
1 x suncream	£13.05	£4.79	£6.20	£2.32	£6.64	£9.17
1 x insect repellent	£5.66	£3.05	£4.52	£2.32	£2.21	£4.89
Resort costs for one week	£795.10	£634.56	£672.88	£315.41	£474.33	£932.91
One week package holiday	£1,905.00	£1,407.00	£1,706.00	£1,597.00	£1,812.00	£2,255.00
TOTAL COST FOR ONE WEEK	£2,700.10	£2,041.56	£2,378.88	£1,912.41	£2,286.33	£3,187.91
YEAR ON YEAR 2019 VS 2018	-21.6%	-17.7%	-10.5%	-9.7%	+4.6%	+12.7%

Source: Pavlic, V., 2019

Prices for tourism services (accommodation and food & beverages), when considering Croatia, are often questioned. Tourism is a branch of the economy that is highly vulnerable to external influences and to the international market. All the above-mentioned Mediterranean countries have strengthened their competitiveness with strong promotional and marketing activities by hoteliers and tourist boards. In Croatia,



prices are rising so fast that the price / performance ratio is debatable. With such a percentage increase in price, guests expect the content and the quality to correlate with it. That may be called into question.

**d) “Sun and Sea” concept not enough for long competitive advantage (2)**

In the 1970s, when tourism in Croatia took shape, the sun and the sea were the main assets for attracting tourists. Today, almost half a century later, this concept is no longer sufficient, as tourists are increasingly looking for additional facilities and active vacations. The “sun and sea” concept is not new of course and researchers take that as a starting point in a critical context: “Even though Mediterranean countries have a lot to offer in terms of historical and cultural heritage, most tourists visit them to enjoy a warm climate and the coastal natural attractions” (Orsini and Ostojić, 2018).

The question is whether it will survive in the international comparison in the long term. Of course, this question cannot be answered without this and that, but, at least in part, it has to be examined and evaluated in its basic totality, and that includes examining its disadvantages: “It is geographically concentrated along the coast, which generates congestion costs and feeds regional imbalances. Moreover, nowhere in the EU does tourism show such a strong seasonal profile as in Croatia” (Orsini and Ostojić, 2018).

### **Category System as a Further Instrument of Content Analysis Work**

According to Gläser and Laudel, the category system serves for a more appropriate extraction of the relevant information from the expert interviews. It builds on the preliminary considerations and questions of previous chapters and thereby ensures that the information extraction is guided by the preliminary considerations (Gläser and Laudel, 2010: 201). In this chapter, the content analysis mentioned is carried out in a slimmed-down version, since the antithetical discussion presented already offered a broad information radius from all interview results. The actual intention of this chapter is to further condense the core contents of the interview results and to divide them into main categories in order to address the research question in a further dimension.

The authors have developed three main themes for the category system, which are incorporated into the corpus of the study as empirical core elements:

**a) (Cultural) Tourist perspective of the country:**

The majority of the interviewed experts evaluate Croatia as a country with Mediterranean unspoiled beauty, which includes in particular the beautiful Adriatic Sea. In addition, the domestic and ecologically cultivated or Mediterranean food products, including wines, also stand out. Another reason given for the special position of the country is that security aspects are more in the focus of interest today than ever. This operational importance of general security brings obvious advantages to the country, also due to its entry into the EU, when compared to other holiday destinations (e.g., in Asia or Africa). This is not a fundamental reorientation in the tourism industry but, as a result of global unrest and terrorist attacks, this point is more important than ever and can be categorised as a possible delimitation feature.

**b) Current (economic) challenges:**

Basically, the perspective of the experts was transferred from the positive argument to a critically oriented position. Various points and suggestions emerged in which the experts not only saw potential for improvement, but rather an urgent need for action. First of all, there is talk of a lack of manpower that cannot be managed. This is closely related to the tax dissatisfaction of the tourism companies, who would use the desired tax relief directly to recruit better staff. The majority of the experts not only criticise this point from the theoretical aspect, but it became clear that they are confronted with it also in their daily practice. They argue that such an implementation could sustainably improve the level of education and the salary conditions in the hotel industry.

**c) Sustainability and future strategies:**

The last category “Sustainability and future strategies” deals with the extent to which the tourism industry in Croatia can persist in the European tourism market and which strategies would be necessary. Critical and positive statements in the results of the expert interviews roughly balance each other out. However, what remains, according to some respondents, is the

lack of specification of long-term strategies that affect Croatian tourism. On the one hand, this includes the perception that the current tourism infrastructure only partially meets the needs of tourism development. On the other, the insight that the country is still competitive, but that it has to continuously improve the quality and the offer for guests. One of the key insights gained from the work can also be seen here because, according to the current development, the competition is not sleeping and the (too) high price level of the country could make cheaper countries like Albania more attractive in the future. Namely, Albania introduced a number of tax measures (from the end of 2018) to attract foreign investors in the hotel industry. Domestic economic problems, such as the rapidly increasing employment of foreign forces from Serbia, and the simultaneous emigration of the Croatian population, certainly do not make the perspective in the overall context any easier.

## CONCLUSION AND OUTLOOK

The research above has shown a differentiated picture of the tourist situation in Croatia. The sunny side of the country with certain emphasis is obvious; the negative aspects have been developed on the basis of a qualitative content analysis of the respondents. The ten expert interviews with proven experts build on the preliminary considerations and initial findings from Chapter 2 and on the questions derived in the initial chapter. The practical point of view was quickly adopted, and the reference country Croatia was examined in perspective. The influencing factors already described and presented in theory chapter 2 were also largely consistent in the results. As a result, the change requests of the interviewees were particularly striking. They affected the economic indicators of the country (listed according to the number of mentions) and expressed their desire for corresponding measures:

### Change Requests (“Three Things to Change” Question 10)

- **Tax policy** (tax reduction in tourism sector, VAT & income) - using it for wage growth and subsidies for (hoteliers) regarding offseason work (9)
- **More vocational education** / raise early education and specialisation in gastronomy, hospitality and tourism (from demanding level to Top Management) (5)
- **Subsidies**, extension of measures for the development of continental part (3)
- **Maintenance** (or sale, rental or a private arrangement) regarding numerous tourist facilities that are empty and rugged and owned by the state (2)
- Focus on **development strategies** (“unique emotion as a key factor for sustainable tourism is missing”) (2)

There is initially a great disappointment among entrepreneurs in terms of tax aspects and lack of subsidies. It also calls into question educational policies that do not stand up to the current demands of the tourism sector. This automatically results in requirements and wishes for the future that are expressed and addressed as future aspects and challenges within the study (listed according to the number of mentions):

- **Lack of labour force** big future problem: (9)
- **Missing vocational training** in tourism areas / gastronomy: staff insufficiently educated and trained for high level service (4)
- **Seasonal employment** through imported labour from neighbouring countries / government should intervene (3)
- **Salaries** are not enough for young people from Croatia / government should help with subsidies for working in postseason and retention of young people
- **Lack of quality staff** approaches slowly the domain of chaos. Each tourist worker is the mirror of the achieved standard of destination and a decisive element of sustainable tourism. Educating employees at all levels can bring a better perspective (“The Returning Guest - The Prospering Employee - Growing Capital”)

As seen from the results of our research, the biggest challenge for Croatian tourism is the lack of quality and educated workforce. Croatia's labour market capacity is certainly not enough, and the country will have to turn increasingly to attracting foreign workers from Eastern European countries and beyond. There are profound points of argument which give their attitude to the preceding remarks; as Kotler, Bowen and Makens state: "Employees value working in well-run organisations that offer high quality products. Receptionists do not like to receive guest complaints. The costs of poor quality include absence, fluctuation and employee morale. . . . researchers have compiled a list of reasons recently cited by students of hotel and restaurant management schools as reasons for dismissal. One of the reasons they cited was a lack of quality in the organisation. When an organisation has good quality, it can retain good employees. Recruitment is easier and training costs are reduced (Kotler, Bowen, and Makens, 2010)." The transparently pointed out and cited problem reflects poor pay levels, poor education and skills in a still predominantly state-owned economy, which has led many young Croats, according to analysts, to find more lucrative and efficient work in wealthy Western EU countries.

Recent developments show that at least 30,000 jobs in the country, mainly in tourism, are vacant and that there are also deficits in the construction and manufacturing industries. This also impedes the hope of catching up with colleagues in the European Union. This shows that there is potential, not only in the qualitative area, but also in the quantitative area in the economic context of the country. Closely connected and overlapping is the challenge that Ilic implements: "This at a time when Croatia and other European Mediterranean tourist hotspots are struggling to cope with huge crowds arriving on cheap flights and cruise ships in the summer high season (Ilic, 2018)."

In conclusion, the importance and advantages of the tourism sector are undisputed for Croatia. What is more disadvantageous are its characteristics, which have displaced the other areas of the gross domestic product. Proper industry and agriculture, which together accounted for the majority of the GDP 30 years ago, are now looking extinct. Whether this imbalance can be equalised is considered unlikely. However, the tourism sector should at least be more focused on sustainability, so that its potential is not limited to three months of the year, because cultural heritage and the beautiful nature could also be used in the other months for tourism or otherwise.

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