

Introduction

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TOURISM IN CROATIA

There are several reasons for the increasing interest shown towards Croatian tourism in recent years. The recent accession of Croatia to the EU is creating general and scholarly interest in the country's primary, secondary, and tertiary industries. In terms of tourism, Croatia is a rising star. Although occupying only 1.3 % of the EU territory (European Union, 2016), and accounting for less than 1 % of the total EU population (Eurostat, 2015), it realizes 61 million of tourist nights or 5.1 % of EU total. When the number of tourist nights is put in proportion to the population size, Croatia is the most popular destination of the European Union, alongside Malta and Cyprus. Most of its tourism activity is realized in the Croatian Adriatic (officially the EU NUTS2 region). The Croatian Adriatic is a popular destination for foreign tourists and comprises one of ten EU regions that collectively account for over 90 % of foreign visitors to Europe (Eurostat, 2016). Tourism is important to Croatian economy,

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contributing 10.4 % to the national GDP and 13.3 % to the national employment (Ivandić, Marušić, Šutalo & Vuĝlar, 2014). A long history together with the impressive recent performance of Croatian tourism industry combined with a scholarly approach to key issues of destination strategic planning and development makes this book timely, both in terms of its Croatian and, broader, Adriatic/Mediterranean context and themes covered.

Croatia, is an independent state since 1990 when it seceded from the former Yugoslavia. Geographically, it is an Adriatic and Central European country, easy to reach by road from main European outbound markets. Its 56,000 km² in a shape of a boomerang is divided into three geographical zones—lowland Pannonian to the north and north-east, mountain Dinaric, and the coastal Adriatic. Although there is a strife to disperse tourism demand geographically throughout the country, tourism is primarily developed along the Adriatic. It is a narrow strip of karst coastline and islands bordered inland by steep mountain ranges. The total coastline length stretches to 1,777 km due to many inlets and bays making it, after Greece and Italy, the longest shoreline in Europe. Of that, three quarters is made of elongated islands that stretch parallel the shore. With 718 islands and islets, 289 rocks, and 78 reefs along the coastline, Croatia is sometimes described as the ‘land of a thousand islands’, and these islands are important for the geographical identity of the country. With a population of 4.4 million, it is one of the more sparsely populated countries of Europe with a population density of 76 per km² (Croatia, 2016).

The popularity of Croatia as tourism destination is still on the rise. After independence, it has been promoted as the ‘Mediterranean as it once was’ to achieve clear geographical positioning as an independent state and to appeal to memories of its loyal old guests and to the nostalgia-driven market segments of new ones. As it has gradually widened the product portfolio with an array of products appealing to special interest, it has since moved to lifestyle positioning. It has clearly captured the market attention as its destinations are increasingly voted among the best on various travel portals, by travel association and travel magazines.

Coinciding with similar developments all over Europe, tourism started to develop in the mid-nineteenth century along the coast, as citizens of polluted industrial towns of Central Europe flocked to the coastal health retreats, made accessible by newly developed railway and steamship lines. In the post-WW2 era, tourism started to flourish in the

1960s, when fiscal policy measures stimulated significant investments in tourism facilities and transport infrastructure. At the same time, the increase of living standard of the local population and border crossing liberalization enabled an increase in traffic of domestic and foreign tourists. Under the state-run economy, there was a sharp increase in tourism accommodation, from about 40,000 beds in 1955 to 800,000 in 1984 (Large Geographic Atlas of Yugoslavia in Kranjčević, Chap. 9) seeking to increase it to over 2.5 million in 2000 (Kobašić in Kranjčević, Chap. 9). With some decentralization in planning and sovereignties given to private ownership and entrepreneurship, private accommodation started to flourish from the 1970s. By 1990, just before the outbreak of the Homeland war, there were 862,000 beds, of which 32 % in private accommodation. However, owing to the decaying state-run resorts, low quality of private accommodation, shifts in demand, and emergence of competitors, the tourism already started to show signs of an early decline. The steady increase in tourism arrivals and overnights peaked in 1987/1988 of about 10.5 million arrivals and 60 million overnights and then started to decrease to 8.5 million and 55.5 million, respectively, by 1990 (Croatian Bureau of Statistics, 2012). With the outbreak of war, the tourism activity abruptly came to almost a halt. However, tourism has recovered relatively quickly, certainly much quicker than the early post-Homeland war plans have envisaged. By 2010 the numbers of tourist arrivals and overnight matched those of 1988.

In 2015, Croatia recorded 71.6 million overnights, 92 % of which by foreign tourists in about 943,000 of permanent beds, of which 17 % in hotels and resorts, 48 % of private accommodation, and 25 % in camps (96 % of them in coastal area). The major Croatian generating markets are Germany, Slovenia, Austria, the Czech Republic, Italy, Poland, Slovakia, the Netherlands, the United Kingdom, and Hungary. The tourist activity is geographically concentrated on the narrow coastal strip, accounting for 95 % of total overnights, and shows a high degree of seasonality with 63 % of tourist overnights spent in the two summer months (July and August) and 35 % in shoulder seasons (April to June, September, and October) (Croatian Bureau of Statistics, 2016). Tourists express high level of satisfaction with the scenic and natural beauties of the country, friendliness of hosts, and personal safety, perceiving it as an excellent family destination, testified furthermore by a very high level of repeat tourists (83 % to Croatia, 61 % to the same destination) (Institute for Tourism, 2015).

In spite of these positive trends, Croatian tourism is still facing significant challenges. In essence, it is a mature tourism destination dependent on the sun&sea product, with a pronounced seasonality, typical for all warm-sea destinations. However, while its Mediterranean competitors started to restructure its tourism sector in the 1980s, Croatia—due to the breakup of Yugoslavia and war—has started to upgrade its tourism infrastructure after 2010. The steady growth of tourism since then is a result of expansion and upgrading of bed capacity, rather than in an increased occupancy rate, although there is a trend of increase in the product breadth and depth. The *Strategy for Croatian Tourism Development to 2020* (Ministry of Tourism, 2013), adopted by the government, aims to address the main challenges faced by its tourism sector—seasonality and geographical concentration of tourism activity; overreliance on natural beauty and cultural heritage as key tourism attractions with a subsequent lack of new purpose-built attractions; slow introduction of products for special interest markets, coupled with traditional approach to marketing; growth based on expansion of private accommodation; and insufficient investment in tourism infrastructure, especially hotel capacity.

The main goals of the Strategy are to increase its attractiveness and competitiveness to ensure a top-20 ranking on the Travel and Tourism Competitiveness Index, achieve 7 billion Euro investment in tourism, increase foreign tourism expenditure by 6 billion Euro, generate 30,000 new jobs (20,000 direct and 10,000 indirect jobs), increase capacity by 100,000 beds, and spread tourism more equally temporarily and geographically. Achieving these goals requires creative and practical solutions based on a sound theoretical approach to the issues of effective strategy implementation with support of a broad range of stakeholders, efficient destination management, improved marketing and branding, effective spatial planning, improved and expanded tourism attractions, timely statistics on the scope and impacts of tourism, and sound management of natural and cultural resources to ensure sustainable tourism development. The chapters of this book are addressing a number of issues related to the struggles to improve performance of Croatian tourism industry while ensuring its long-term sustainability.

THE INSTITUTE FOR TOURISM, ZAGREB

This book is prepared by the researchers of the Institute for Tourism, Zagreb. It is one of the 25 public research institutes in Croatia and among the oldest tourism research institutes in Europe. Its history dates back to

1959, when it was set up by the Croatian Chamber of Economy for the purpose of providing consultancy and microeconomic studies for the tourism industry. In 1986, it was turned into a public scientific institute and given its current name. It now employs 28 staff, of which 20 are scientists.

The mission of the Institute is to foster sustainable tourism development through its scientific, professional, and educational activities. In the focus of its research interest are four broad themes: economic impacts of tourism, visitor behavior and experiences, sustainable destination development and governance and transport, and environment and tourism. The Institute mostly conducts applied research focused on solving practical problem faced by the theory and practice of tourism development, both globally and in the context of Croatian tourism. In this way the research conducted directly contributes to the economy and, in general, to the sustainable local and regional development of Croatia. The research that the Institute conducts is mainly based on the positivist paradigm that generally dominates in tourism research and is, accordingly, quantitative. However, reflecting the increasing importance of the interpretive and critical studies with qualitative research method, with a team of social geographers focused on tourism, local community, sustainability, and the management of development, research by the Institute gradually includes those based on an interpretative paradigm.

From its beginning, the Institute has gained a wealth of experience in tourism planning and development. Applying the theoretical knowledge and scientific rigor, the Institute is engaged in development and management plans for tourism destinations, development of specific tourism products, restructuring and development of hospitality enterprises, as well as planning an implementation of operational solutions. The knowledge and experience gained from the scientific and applied work are disseminated widely to the Croatian professional community through specialized tailor-made educational programs, participation in the educational programs of Croatian universities and professional associations, and development of on-line educational courses for on-line staff in tourism and hospitality.

Through research, consultancy, and education, the Institute affects tourism development of many local communities and, by recommendation and the development of performance indicators, facilitates the formation of a national tourism policy and the adoption of different measures. More recently, the Institute was in charge of development of the abovementioned *Strategy for Croatian Tourism Development to 2020*, largely founded on the results of its primary research, adopted by the government, and

followed by a series of action plans to operationalize national strategic goals, such as product development (nautical tourism, bike tourism, rural tourism, congress tourism, cultural tourism, social tourism), accommodation sector (small/family-run hotels, private accommodation), fostering business climate (competitiveness, small- and medium-sized tourism enterprises, education for tourism), and sustainability (green tourism). It was involved in strategic and marketing plans from major tourism regions and destinations of Croatia, and it is facilitating tourism development in continental Croatia through planning and education. It is also the fore-runner in product developments, in particular heavily involved in research and planning of nautical tourism, cultural and river cruise tourism. Its longitudinal market survey of summer tourists along Adriatic and occasional product demand surveys such as cultural tourism, national and nature park, transit tourism, and nautical tourism (known as TOMAS surveys of tourist motivation, activities, satisfaction, and expenditures) are used widely for the purpose of planning, product development, and promotion.

Internationally, apart from the international-interdisciplinary journal *Tourism*—one of the oldest tourism journals in the world for which the Institute is best known—it nurtures partnerships with colleagues from similar institutions, particularly from English-speaking countries (Australia, Canada, New Zealand, UK, USA) whose works prevail in the international academic journals and from Western European countries as well as countries in the region. It is an excellent and productive cooperation, as colleagues abroad have profound theoretical knowledge, but are somewhat distanced from tourism practice. With this partnership with academics worldwide, the Institute reaches a global scientific community, while the cooperation with the UN World Tourism Organization (UNWTO) serves to make the Institute relevant to the global professional audience. The core of the cooperation with the UNWTO is on determining new segments of the tourist demand and the harmonization of research instruments in order to achieve greater data comparability on an international level. The work that is conducted at the Institute, as this book clearly demonstrates, is of relevance to the international scholarly and professional community.

OVERVIEW OF BOOK CONTENT

The book combines two aspects. The first is a theoretically oriented approach to destination planning and development. The second aspect comprises a problem solving focus on Croatian tourism. The contents will

be of interest to all scholars, students, and practitioners engaged in various aspects of destination development planning and management as well as those interested in how Croatia is approaching its tourism development.

Against this background, the book is structured in 14 chapters, roughly organized according to the planning process.

In Chap. 2, *Crafting a National Value-Driven Tourism Vision*, Renata Tomljenović and Irena Ateljević start from the premise that the crafting of destination image and identity is the most critical aspect of a strategic approach to tourism development. This chapter outlines a novel and innovative approach to crafting a value-driven vision for tourism development. The proposed value-driven approach is based on the need to depart from the classical market-driven competitive positioning that is argued to foster long-term unsustainability for the tourism industry with serious disturbance to the fabric of social, cultural, and environmental life. The value-driven approach calls up an awakening of more human values of reciprocity and stewardship that go beyond currently dominant economic and competitive concerns. The chapter starts with a theoretical discussion of market versus value-driven visions framed within the current discourse of conscious travel and responsible business practices. It then provides a historical insight into the visions that have, supposedly, guided Croatian tourism development since the 1990s, before presenting results of a series of workshops and consultations with the Croatian tourism stakeholders for the purpose of defining Croatian tourism vision to 2020.

In Chap. 3, *Managing Tourism Development Process in Croatia: Can EU Accession Help?*, Ivo Kunst presents a provocative analysis of the relationship between planning and implementation, highlighting the opportunities offered by EU accession to improve the quality of destination management. Although international tourism receipts, particularly in times of declining economic activity, have traditionally been used to stabilize the Croatian economy, successive Croatian governments have treated tourism predominantly as a ‘gift from heaven’ and have not shown much interest to oversee its development. In 2015, the Travel and Tourism Competitiveness Report ranked the competitiveness of Croatian tourism 33rd in the world. A survey of local authorities and DMO directors revealed that Croatia’s rather poor tourism competitiveness stems predominantly from the inefficient implementation of tourism development strategies at the destination level. The survey results also indicate that most of the constraints impeding Croatia’s tourism competitiveness could be effectively neutralized using the EU structural and cohesion funds. This chapter also

suggests that the access to these funds will be largely conditional upon the overall quality of Croatia's integration into the economic, fiscal, and regulatory system of the European Union.

Chapter 4, *Shaping Destination Identity: Challenges of Branding Croatia* by Neda Telišman-Košuta, focuses on destination image and identity delivered through consistent branding, analyzed through Croatia's attempt to move away from a 'sea, sun, and summer' only destination against the lack of capacity to deliver consistent branding strategies. Striving to extend its image beyond that of the three S markets and to improve its competitive position, much of recent destination development and marketing planning in Croatia has dealt with branding to some extent. However, destination branding has largely remained strategy on paper. Interviews with regional and local tourist boards across Croatia reveal their perceived incapacity to act as branding managers due to insufficient finances, human resources, knowledge, and authority. The power of destination branding is seen to be curtailed by lack of 'destination thinking' and 'destination leadership'. In view of these limitations, it is suggested that future research should explore possibilities of destination brand management stemming from collaboration and leadership theories.

Political issues of tourism development are addressed in Chap. 5, *The Influence of Political Factors in Fashioning Destination Image* by Božo Skoko, Katarina Miličević, and Damir Krešić. The chapter examines the role of tourism in creation of national identity against the historical background of relatively recent formation of a nation state. The authors argue that political factors as well as tourism promotion can play an important role in the formation of national brands and that strong national brands can substantially increase a nation's competitive advantage in the global market. This is particularly true for countries in transition such as Croatia that have gained independence and face the imperative of creating a completely new national image. During the last two decades, Croatia has successfully repositioned its image from an unknown Yugoslav republic, victim of war and newly formed Balkan state, to an attractive tourism destination. Tourism promotion has played an important role in this process with the Croatian National Tourist Board relying heavily on tourism attractions to disassociate the image of Croatia from its neighbors, especially from other former Yugoslav countries. The chapter presents research of Croatia's image in the most important Western tourism generating markets, countries in the Middle

East as well as in neighboring countries. The research also identifies additional attributes and strategies that could be used to create a stronger, global brand for Croatia.

Management issues are addressed in Chap. 6, *Tourism Destination and DMO Transformation* by Sanda Čorak and Snježana Boranić-Živoder. Due to the strong competition that characterizes the European tourism market, many countries face the challenge of improving the efficiency and efficacy of destination management. Croatia, from its inception as an independent state, has been developing its destination management approach based on a system of tourism associations (DMO), from local through regional to the national level. In recent years it has been found to be difficult to follow the rapid changes taking place in the tourism market. Based on research carried out in the public sector, poor destination management has been identified as one of the limiting factors of tourism development of Croatia. A central question arises as to how to ensure the efficient yet consistent destination management organization and its structure in a face of rapidly and continually changing organization and business environment and against the rapid growth of tourism arrivals and overnights. This chapter identifies the weaknesses and advantages of the existing destination management system. It also analyzes possible ways to transform the system in order to preserve the existing foundation and strengthen the system to be able to meet all tasks of destination management in a competitive tourism market.

Whereas the first five chapters deal with the key aspects of tourism planning and management—defining a guiding vision, identifying the challenges of delivering it in practice through sound management, building destination identity/brand and national (tourism) image, and setting up and continuously innovate destination management structure—the focus of the book thence shifts to identify some important tools necessary for sound decision making in both planning and implementation stage.

In Chap. 7, *Tourism Attraction System*, Eduard Kušen argues that although tourism attractions are a basic resource for long-term tourism developments, they are not given the proper attention, both theoretically and practically. For tourism planning, an important yet theoretically underdeveloped area is its relationship and interdependence with spatial planning. The chapter presents an innovative approach to tourism attractions from the lens of spatial planning from the identification, classification

to evaluation of tourism attractions. While advancing the theory of tourism resources and attractions, it also presents a highly practical planning and management tool. This new system of tourism attractions is tested through the series of case studies. It is argued that one cannot understand the importance of tourism attractions for the development of tourism without full knowledge of the integrated process of converting a tourism resource into a market-ready tourism product.

For sound decision making, but especially for advocating tourism interests to the broad range of stakeholders, the economic contribution of tourism is an important issue. Chapter 8, *Implementation of Tourism Satellite Account: Assessing the Contribution of Tourism to the Croatian Economy* by Neven Ivandić and Zrinka Marušić, addresses tourism's contribution in Croatia based on the Tourism Satellite Account (TSA) approach. While Tourism Satellite Account is the recommended method by the UN World Tourism Organization, its application is less straightforward in the case of developing countries and countries in transition. The chapter demonstrates technical aspects of compiling core TSA tables within the available tourism statistic data in Croatia. The adopted approach is compared to solutions implemented in other European countries. The resulting TSA macro-aggregates show that the contribution of tourism to the Croatian economy is higher than in many other tourism developed countries. Taking into account TSA scope as confined to the direct effects of tourism demand on production, employment, investment, and government revenues and expenditures, the chapter then discusses the role of TSA in the wider context of the tourism planning process. Although the TSA cannot be directly used as planning tool due to its descriptive character, it helps in the fine tuning of tourism statistics and creating the basis for construction of different stochastic and deterministic economic models. As an example of such TSA extension, the chapter presents an application of input-output model based on TSA in order to measure the indirect effects of tourism demand in Croatia.

In Chap. 9, *Abandoned Tourism Resorts in Croatia: The Consequences of Discordant Spatial Planning and Tourism Development Policies*, Jasenka Kranjčević explores the challenges brought about by the abandoned tourism zones or resorts in Croatia. It is argued that resorts' demise is primarily a result of poor planning, incompatible policy networks between different government bureaus and sectors, complex ownership structures, a web of incompatible laws and regulations, and unrealistic expectations together with lack of institutional/bureaucratic cooperation. It is further argued

that the resorts' closures may have resulted from incompetent management and 'creative' accounting, as well as the Homeland war. With all indicators showing a continued demand for tourism land, it simply defies logic to still have abandoned resorts idle away on valuable land and in prime locations. Current legislative incompatibility and a lack of inter-departmental and inter-sectoral will are some of the consequences of socio-political changes of the 1990s. Other factors include the transition to the market economy, bureaucratic inertia, and insecurity. Not surprisingly, the rights and obligations of tourism industry stakeholders have not been clearly defined nor articulated, including, among others, the use of tourism land. Since the government continues to plan for and allocate new areas for tourism development, the abandoned tourism resorts are an indication of an irresponsible and irrational use of valuable land, allowing further degradation and pollution of local and regional land resources, and a gross mismanagement of the existing natural, economic, and cultural capital.

While sustainable development is generally honored in principle in tourism planning, there is a question of its practical implementation. Tourism in general, including tourism in protected areas, inevitably changes and disturbs the socio-cultural and natural environment. In Chap. 10 *Sustainability Issues in Management of Tourism in Protected Areas: Case study of Plitvice Lakes National Park*, Izidora Marković espouses the principles of the development and management of protected natural areas in the world as the basis for finding the most appropriate model of management for the Plitvice Lakes National Park, a UNESCO-protected national heritage. The analysis shows that the main factors that have negative impact (global, regional, and local) on the area of Plitvice Lakes are the impact of tourism, residential function, agriculture, transport, and unresolved communal infrastructure. Plitvice Lakes National Park is a representative example of developmentally loaded protected natural areas, which requires the application of the new development paradigm with the aim of permanent protection of its natural phenomena. The future development of Plitvice Lakes National Park requires continuous research on economic, social, and environmental processes, to better align future development with the principles of sustainable development, particularly through spatial planning and management.

Of essential importance to sustainable tourism development is a consistent data collection exercise and research agenda able to track and analyze changes in tourist demand. In Chap. 11, *Identifying Trends in Tourism*

Demand Using Longitudinal Survey, Zrinka Marušić, Ivan Sever, and Sanda Čorak propose an approach to tracking the changes in behavior and characteristics of tourists that enables Croatian tourism marketing experts to gain rich data at the regional and national level. The authors identify tourism as a complex and dynamic phenomenon, affected by various economic, social, cultural, political, technological, and environmental trends. These trends affect the characteristics and expectations of tourists as well as tourism flows and therefore have implications for destination management and the types of products and services that tourism businesses need to develop. The key challenge for successful tourism industry is the ability to recognize and adapt to these trends. Tourism destinations that fail to adapt have difficulty maintaining their competitiveness and delivering tourism products and services that stimulate satisfaction and create loyalty. Furthermore, the movements on tourist market are strong, and people tend to search for new destinations and new experiences. To deal with these challenges, tourism researchers should look beyond the present manifestations of tourism and use research designs that are able to examine and monitor the underlying mechanisms of change. Longitudinal research is particularly appropriate for such purposes (to study the patterns of change over time) and as such is a key process for understanding tourism development. Although the number of longitudinal surveys in tourism is increasing, only a few assess the changes in behavior and characteristics of tourists in the destination itself. This chapter presents a methodological guide and empirical trend study to stimulate much needed research in this area. Presented empirical case study is based on longitudinal survey of attitudes, activities, and expenditures of Croatian tourists in the period from 1987 to 2014.

Chapter 12, *Longitudinal Assessment of the Carrying Capacity of a Typical Tourist Island: Twenty Years On* by Jakša Kivela and Zoran Klarić, highlights the tourism growth of Vis Island over a twenty-five-year period, from when the first carrying capacity was conducted in 1991 to today. An examination and understanding of changes, both negative and positive, highlight what models of tourism development are appropriate for this ecologically fragile small, remote island. The chapter focuses on the limits of what acceptable change planning process must be without putting at risk the island's natural and cultural heritage. Importantly, guidelines for regulating future tourism development that does not adversely alter the cultural-social-biophysical endowments of Vis Island are recommended.

The issues addressed are relevant to the tourism development of Adriatic islands generally.

Gastronomic tourism, while important to Croatia, has been under-researched in the wider scholarly literature. In Chap. 13, *Gastronomy Tourism: Croatia a Land of Wine and Plenty, Or Beyond Pizza and Grill!*, Jakša Kivela argues that although the literature supports the view that there is a connection between tourism and gastronomy, there is little empirical evidence to show, for example, whether or not there is a culinary-tourism market segment. Does a destination's gastronomy contribute to the tourists' quality of experiences while visiting the destination? And, do tourists return to the destination to re-sample its cuisine? The most recent literature suggests that gastronomy is becoming an important attribute in the development of niche travel and niche destinations. A question whether motivation to travel for gastronomy is a reasonably valid construct to use for tourism market segmentation purposes is answered based on research conducted on two islands in the South Adriatic, popular by foreign tourists. This study was undertaken during the summer season on the islands of Vis, Hvar, and Korčula in Croatia between 2010 and 2013. These middle-Adriatic islands are well-known tourist destinations that offer authentic Dalmatian gastronomy. The results of this study suggest that motivation to travel for gastronomy is a reasonably valid construct to use for tourism market segmentation purposes. The results of the data analysis reveal that gastronomy plays a considerable role in the way tourists experience a destination and indicate that quite a few travelers would return to the same destination to savour its unique gastronomy. Implications for research and suggestions for destination planners are also discussed.

Chapter 14, *Tourism future: Towards Transformational Tourism* by Larry Dwyer, Irena Ateljević, and Renata Tomljenović, ties together the main propositions of the book grounded in the standard tourism planning framework to dwell on the future of tourism and tourism research. Linked to the first chapter on value-driven national vision, this chapter discusses how travelers shape tourism development and addresses the power of tourism to transform societies towards more healthy state of being. The chapter identifies current and emerging tourism practices with a transformational potential, identifying the benefits that Croatia could potentially derive by embracing new tourism practices, identifying the implications for the future of tourism in Croatia, and for emerging destinations globally.

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