

TATJANA GREĐIČAK¹
DAMIR DEMONJA²

STRATEGIC MANAGEMENT OF SPECIAL FORMS OF TOURISM IN THE REPUBLIC OF CROATIA

***Abstract:** Republic of Croatia daily seeks to reform the entire socio-economic system according to the criteria and achievements of highly developed countries and it is impossible to ignore their achievements in the field of tourism as well. The transition to a market economy implies a thorough restructuring of the overall macroeconomic environment. The development of tourism in the Republic of Croatia should enable revitalization and long-term improvement of the competitive advantages of the entire country/state. The issues of this scientific work is to determine the specificity of effective strategic management for developing special forms of tourism on the continent of the Republic of Croatia. The aim of this paper is to present reference points based on which the scientific knowledge in practical terms will contribute to the concrete improvement of tourism resource management in the tourism insufficiently developed areas of the Republic of Croatia, and thus the intensification of the overall social and economic development. The paper discusses the approach to effective strategic management of special forms of tourism aimed at sustainable tourism development as well as the overall and equitable economic and social development.*

***Key words:** strategy, management, tourism, continent, efficiency, sustainable development.*

***JEL:** M11, M31, Q01, Q28, Z32.*

1. Introduction

Over the last few decades, the entire concept of tourism in the world has transformed and began to valorise unconventional destinations and attractions. Tourists are extremely active and they are interested in the spirit of the place and the whole experience that a certain destination can offer. The Republic of Croatia has an attractive environment and that it is a factor which tourists value. It is also rich in cultural and historical heritage and is very close to major emissive markets. This is an additional opportunity that Republic of Croatia can be used as a tourist destination. Tourists perceive Croatia as a safe country, and it is today, in view of current events, a valuable advantage. However, despite enormous potential, there is an underdeveloped and/or uneven tourism valorisation, especially the continental part of the Republic of Croatia.

¹ Ph.D., Ministry of Tourism Republic of Croatia, Zagreb, Croatia, tatjana.gredicak@kr.t-com.hr. The content, views and opinions expressed in this article belong to the author, Tatjana Gređičak, Ph.D., and do not necessarily represent the views of the Ministry of Tourism of the Republic of Croatia.

² Ph.D., Senior Research Adviser, Institute for Development and International Relations, IRMO, Zagreb, Croatia, ddemonja@irmo.hr.

Although the Republic of Croatia records the increase of tourist arrivals and overnight stays, statistics confirm that the continental part of the Republic of Croatia does not realize 3% of the total tourist traffic in the Republic of Croatia. Also, due to the still underdeveloped tourist and basic infrastructure on the continent, there are no serious hotel investments and investments on the continent except for the rare exceptions of some destinations. All of this consequently leads to unemployment, lower population standards and depopulation in the continental area of the Republic of Croatia. Domination of “sun and sea” tourism in the Republic of Croatia has led to enormous seasonality and uneven regional development and other negative consequences which are not in line with the principles of sustainable development.

By analyzing the state and the surroundings it can be concluded that the Republic of Croatia has extremely favorable conditions for the development of continental tourism. In the “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” [Official Gazette 55/2013] special forms of tourism on the continent are also recognized as a tourism product with high potential. However, the fact is that today continental tourism in the Republic of Croatia is not yet sufficiently developed and most of the potential is unused. Also, it can be concluded that in the Republic of Croatia, continental tourism is not systematically and strategically developed, but it just happens. Continental tourism has been identified as a highly prospective product, but have not yet taken the necessary steps to modernize offer and adapt infrastructure. Furthermore, the legislation is not adjusted at all. Various stakeholders should be involved in the promotion and creation of continental tourism products, as only the integrated product created in this way will be attractive to tourists and will have a special added value. In addition to increasing economic welfare, tourism on the continent could affect a number of other positive effects.

In order to take advantage of all the potential of continental tourism in the Republic of Croatia, it is important to strategically plan its development and to take the necessary steps. It is very important to meet the following basic requirements:

- effective management of tourism development,
- intensive cooperation of all key stakeholders in order to develop a specific destination,
- encourage both formal and informal training for professions in tourism, directed to the local population,
- improvement of communal and tourist infrastructure,
- marketing, and
- raise awareness of the positive effects of tourism.

By meeting these preconditions tourism on the continent could develop in the planned direction, and Croatia could be recognized as a year-round destination, with positive effects on the economy and society.

2. “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”: the umbrella document of tourism development in the Republic of Croatia and its sustainability

„The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” [Official Gazette 55/2013] was adopted in April 2013. The Final part of “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” refers to the implementation of the defined vision and strategic development goals. Emphasis is placed on the operational strategies in key areas of activity [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 32–61]. These are activities focused on product development, development of accommodation offer and tourism infrastructure, investments, marketing, human resources development and tourism development management.

The Action Plan for Implementation of “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”, which was also adopted in April 2013, contains 26 priority measures to improve the competitiveness of Croatian tourism with the anticipated dynamics of implementation [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 66–84]. The main objective of the Action Plan is the establishment of strategic guidelines for harmonized action of the main providers of tourism and economic policies at the national level in order to enhance the competitive ability of Croatian tourism. The priority measures of the tourism policy defined in the “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” are divided into two categories [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 66–69]. The first category (highest priority) consists of measures without which the initiation and/or implementation is not possible to realize the defined strategic objectives and were to be carried out during 2013. The second category (medium-high priority) consists of measures that are of key importance for the achievement of individual development goals and should, for the most part, be carried out in the period from 2013 to 2015 or, in the case of unexpected circumstances, from 2016 to 2020. Within the framework of certain measures from the “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” it is planned to adopt action plans related to particular special forms of tourism. The Ministry of Tourism of the Republic of Croatia has developed action plans/national programs for tourism products of strategic importance for the further development of tourism, which implement certain measures from “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” [<https://mint.gov.hr/istaknute-teme/strategija-razvoja-turizma-11411/akcijski-planovi-15525/15525>].

In the period from 2013 to 2015, the following programs were created:

- National program for the development of small and medium-sized entrepreneurship in tourism,
- National program for promoting small and family hotels,

- National program for the advancement of family accommodation,
- National program for beach management and arrangement,
- Action plan for the development of nautical tourism,
- Action plan for health tourism development,
- Action plan for the development of cultural tourism,
- Cyclotourism development program,
- Program for strengthening the competitiveness of human resources in tourism (regional centers of competence),
- National program for the development of social tourism, and
- Action plan for green tourism development.

National Program for congress offer was presented in 2016 [National program – Action plan for the development of congress tourism, 2013–2016].

In the first quarter of 2018 the Action plan for the development of golf offer was completed [Action Plan for the development of golf offer, 2017]. It is necessary to adopt the Action plan for the development of tourism in rural areas of the Republic of Croatia.

Action Plans/National Programs have elaborated in detail the activities for the implementation of certain priority measures to improve the competitiveness of Croatian tourism, which are part of “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” and their carriers and deadlines for implementation [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 66–84]. All measures of tourism policy defined in “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”, relating to the realization of action plans/national programs targeted at special forms of tourism, are medium-high priority measures (Measures 13, 14, 15, 16, 17 and 18) and were supposed to be mainly carried out in the period from 2013 to 2015, or in the case of unexpected circumstances, in the period from 2016 to 2020 [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 66–69].

In order to improve the implementation of “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”, the Ministry of Tourism of the Republic of Croatia, in cooperation with the Institute for Development and International Relations from Zagreb, in 2017, conducted the “Evaluation during the implementation of the Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” [Evaluation during the implementation of the Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2017]. From the results of this analysis, it can be concluded that the relevance of “The Strategy for Tourism of the Republic of Croatia Until the Year 2020” is not questionable, it is relevant on all grounds. However, according to the judgment of key stakeholders, unlike the “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” most adopted action plans are not relevant in the implementation/practical sense because the action plans are implemented only

partially or are not implemented at all. As for the effectiveness of the implementation, it is not sufficient and has a significant room for its improvement. Implementation is taking place more or less smoothly, institutional support is lacking, interdepartmental co-operation has not been achieved as expected. Despite successful examples of effective co-ordination and co-operation, the fact is that some measures, such as the Cyclotourism Development Program as well as Action Plans for Rural, Green and Health Tourism, could be significantly more effective to realize. The impact/effect of implementation on other sectors and generally on the Croatian economy recorded a slight but insufficient shift.

„The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” has foreseen diversification of products (except “sun and sea”, nautical, health, cultural, business, golf, cyclotourism, gourmet, rural and mountain, adventurous and sports and other types of tourism), which may affect the season’s extension and expansion of the geographic base from coastal destinations to the continent and consequently increase consumption [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 25–27]. Made action plans are not implemented. Although there are valuable initiatives for the development of continental tourism, the biggest obstacle to significant escalations is still the lack of accommodation capacities. Seasonality is still high although the diversified products do not depend on the season. “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” envisages the transformation of tourist boards (TB) into the destination management organization (DMO), but it has not yet been implemented [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 81–82]. The issue of the Tourist Board Act, which would raise the efficiency of the management system, has also been overcome. Overall, revenues from foreign guests in tourism in 2016 amounted to 8 billion and 635 million euros, which is 8.5% more than in 2015. With domestic consumption, tourism revenues in 2016 exceeded 10 billion euros, which is the best result so far. Although it seems that to reach the set target of 14.3 billion euros by 2020, it is necessary to meet the preconditions for fulfilling the previously identified objectives of improving the structure and quality of accommodation and launching investments. Revenue growth could increase even if these preconditions are not met if private accommodation growth continues. This scenario, however, is not in line with the set strategic goal. „The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” has defined the reduction of family accommodation, as its spread has a negative impact on economic, natural and social sustainability so far for in the coastal area. No strategic investment project from 2013 to 2017 has been realized to achieve the planned goals of increasing spending, attractiveness, competitiveness and investment and it is obvious that activities need to be intensified in order to achieve the goals [State Audit Office of the Republic of Croatia. The report on the audit of the effectiveness of the implementation of the measures established

by The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2017: 43–45].

Sustainability as a criterion for evaluation of “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” indicates to what extent are the impacts/projects/initiatives sustainable (those realized and those in progress) and in what extent it is likely that they will last during over a longer period of time, that funding and human resources will be provided for their implementation. Key factors that limit the long-term sustainability of “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” are:

- an uncontrolled increase in the number of tourists compared to the resource base, which may lead to lower quality offer, with the impact on total income from tourism,
- limited capacity management of the “The Strategy for the Development of Tourism of the Republic of Croatia Until the Year 2020”, in particular the implementation of the adopted action plans and national programs,
- insufficiently and vaguely defined role of key stakeholders in the process of implementing “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” and later in the sustainability of the results, and
- lack of qualified workforce and lifelong learning as key factors of sustainability.

Through the process of “Evaluation during the implementation of the Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” “[Evaluation during the implementation of the Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”, 2017], key stakeholders have accepted sustainable tourism as the future in terms of quality and resources. Tourism should not be more elemental, but with more thoughtful synergistic action. The sustainability criterion should be implemented through the rationalization of the institutional framework by employing staff who are trained for withdrawal financial resources from EU funds. According to stakeholders, the key challenge of sustainability of “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” is the lack of educated, skilled workforce and insufficient infrastructure that accompanies the development of tourism at the local level.

3. The structure of tourist products in the Republic of Croatia

The structure of tourist products in the Republic of Croatia has changed in the last decade only to a small extent, as indicated the seasonality curve. Tourism products in the Republic of Croatia can be divided into: *dominant products* (each product contributes at least 5% in revenue structure) [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013:8] and *products*

with distinctive perspective of development [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013:8–9].

3.1. Dominant products

Dominant products are [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013:8]:

Sun and the sea – despite numerous development initiatives and emphasizing the priorities of reducing seasonality and development of other products, the share of sun and sea in the total Croatian tourist product has for years not fall below 85% of physical volume with a slightly smaller share in income (75% to 80%) given his average lower rent caused by the large capacity of family accommodation in households. In addition to lagging in the development of infrastructure for other products and other internal factors, this was certainly influenced by continued stable demand on the global market and the situation in the competitive Mediterranean countries (Spain, France, Italy, Greece and Turkey). In such circumstances, the Republic of Croatia has recorded better business results over the past ten years.

Nautical tourism (yachting/cruising) – a product of exceptional global attractiveness that records continuously high, even two-digit rates of growth worldwide. Because of its geopolitical position and with one of the most indented coasts in the world, pleasant climate and favorable winds, the Republic of Croatia is already one of the most desirable nautical destinations in the world today. This is indicative of the steadily growing business results in nautical tourism, as well as the continuous completion of part of the accompanying value chain. In spite of this, yachting tourism in the Republic of Croatia has been stagnating in the development of the offer of new berths in the marinas in recent years, although with the optimal development concept, demand for them is not questionable. The main cause of this should be sought in an unfavorable investment environment. Cruising tourism in the last decade has marked an increased number of mega cruiser ships, as well as a growing demand for cruising on small domestic cruisers. The operationalization of inter-agency/ministerial cooperation on the implementation of the Action Plan for the development of nautical tourism started to be implemented in 2018 with a delay of 5 years.

Business tourism – despite the fact that this type of tourism is very sensitive to domestic and global economic trends, individual and group business guests are a relatively stable source of demand that, depending on trends, only changes its qualitative characteristics. Research among hotel owners indicate that business guests make a stable 10% to 15% share of all hotel guests. The main obstacle to the growth of this product is the lack of congressional infrastructure (congress/convention centers) and still uncompetitive system management and commercialization of products. By removing these shortcomings could be especially in the regional market and selected niche markets find a larger space for better step forward. The Action Plan

for the development of the congressional offer is not being implemented, although all the conditions have been met to the implementation of Measure 16: Action Plan for the development of the congressional offer in April 2013, on the day of the adoption of the “Strategy for Development of Tourism of the Republic of Croatia Year 2020” [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 79–80].

Cultural tourism – it is unquestionable that on the state level as well as in a number of destinations, over the last 10 years, much has been done on the development of this product group. That was the most contributing to the adoption of the state Strategy for the development of cultural tourism. Also, systematically approaches to the creation of regionally and globally recognized events and the intensified opening of cultural tourism by increasing the number of individual destinations. Key obstacles to further growth should be sought in the commercialization system (primarily in integrating into world systems), and then in a destination management system that would integrate cultural content in a true way in positioning and delivering the overall experience at the level of individual destinations. Particularly relevant products of cultural tourism of the Republic of Croatia include: urban tourism, heritage tourism, tourism events, creative tourism and religious tourism.

3.2. Products with distinctive perspective of development

Products with distinctive perspective of development include [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013:8–9]:

Health tourism – it is a product that globally grows at a rate between 15% and 20% annually. Due to the proximity to large markets, natural beauty and favorable climate, country security, long tradition, competitive prices and, in general, good reputation of health services, the Republic of Croatia has comparative advantages for the development of health tourism, but not sufficiently utilized. Health tourism products particularly relevant to the Republic of Croatia include: wellness tourism, spa tourism and medical tourism.

Cyclotourism – in the European context it is estimated that the share of trips/travels during which cycling is the main activity or bike the main means of transport will increase in the next 10 years more than 10 percentage points. More significant market segments are those for whom cycling on holiday is an important activity. Although the Republic of Croatia is relatively well-equipped with local and county cycling trails, some of which are part of international cycling routes, cyclotourism as a tourism product is not adequately valued or commercialized. In the Republic of Croatia cyclotourism is still a product of development. By analyzing geographic factors and tourist resources, it was concluded that the Republic of Croatia has great potential for cyclotourism development, but it has so far been unused. “Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”

[The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013: 43] recognizes cyclotourism as one of the tourism products with the greatest prospect of development. However, although all preconditions for the planned activities related to the development of cyclotourism have been created since the adoption of the “Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” in April 2013, the activities were not carried out with the defined implementation dynamics and were left out the planned results are defined in the “Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”. There are many reasons for the insufficient development of cyclotourism, and the main ones are: inadequate cyclotouristic infrastructure, insufficient practice of cycling in the local community, insufficient knowledge of the local community, inadequate number of “bike friendly” facilities, lack of inter-agency cooperation and stakeholder cooperation from public and private sector.

Gastronomy and enology – a complex product that consumed almost all the tourists, although a relatively small number of international tourists travel exclusively for gastro-enological experiences, and the growth in demand is largely generated by domestic populations. Available research shows that about 160,000 citizens of the Republic of Croatia visit wine roads, 61% of whom buy local wine and 63% local food products. Furthermore, 53% of visitors order local wine in restaurants. Although gastronomy and enology as the tourism product is most developed in Istria, and then in Dalmatia and Slavonia, the systematic approach to the development of the eno-gastronomic tourism offer is still insufficiently evaluated, even though it has been an integral part of the country’s tourism promotion for many years.

Rural and mountain tourism – it is estimated that rural tourism, including mountain areas, participates in the total international travels with a share of around 3%, with an annual growth of around 6%. Faced with underdeveloped domestic demand and inadequate environment, the Croatian rural tourism offer is developing very slowly. The exception is only Istria, and to some extent Osijek-Baranja County. As far as mountain tourism is concerned, existing mountain centers such as Bjelolasica, Platak and Begovo Razdolje not so far made greater strides towards open throughout the year. The rural tourism development action plan has not yet been adopted.

Golf tourism – as one of the oldest sports and centuries-long entertainment of the social elite, golf is now a globally popular, with an estimated 60 million players and 32,000 playgrounds in the world. The number of playgrounds in today’s propitious golf destinations in the Mediterranean has increased from 2009 to 2011 from 17 to 20 in Turkey, in Portugal from 78 to 86 and in Spain from 316 to 352. The Republic of Croatia currently does not exist on the map of tourist golf offer despite today, and in the future, the golf tourism is one of the most important market segments of Mediterranean tourism demand, especially in periods outside the main tourist season. The Action Plan for the development of the golf offer started to be implemented in 2018, with a delay of 5 years, although the adoption of the “Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”, in

April 2013, created all the prerequisites for the beginning of realization of the planned activities related to the development of golf tourism, based on Measure 17: The Action Plan for the development of the golf offer defined in the “Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” [The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020, 2013:68].

Adventure and sports tourism – is the scope of an increasingly important and rapidly growing group of products for which some operators report growth of up to 30% per year, which includes, for example, diving, kayaking and canoeing, rafting, adrenaline sports, hunting, fishing, winter sports and sports training. Although in the mountainous and coastal part of the Republic of Croatia there is a rapid development of a wide range of different, including niche adventure/sports programs (eg. caving, paragliding), the Republic of Croatia still does not sufficiently utilize its comparative advantages for the development of this product group.

Ecotourism – it is estimated that around 3% of international vacation trips (leisure travel) are motivated by ecotourism and supported by growing ecological/environmental consumer awareness, the product shows a strong growth, between 10% and 20% per year. Despite the availability, attractiveness and preservation of natural resources, ecotourism in the Republic of Croatia is still very poorly developed. Especially concerning is the fact that ecotourism has been neglected even in the most protected natural sites.

4. Conclusion

In view of the foregoing, the system of tourist products of the Republic of Croatia, starting from the existing characteristics of the Croatian tourist offer, as well as from the qualitative characteristics of the Croatian tourist and attractiveness offer, defined ten key product groups on which the system of tourist products of the Republic of Croatia should be built by 2020. This diversified system of tourist products was a prerequisite which would have enabled the Republic of Croatia to penetrate the wider structure of the visitor segment whose propensity to different types of travel, different price positions and travels at different times of the year opens the possibility of significant time extension of tourist activities and an increase in tourist spending in the Republic of Croatia.

The development of special forms of tourism, primarily on the continent, which does not depend on “sun and sea” should be influenced by the reduction of seasonality and at the same time with effective strategic management of the development of tourism, aimed at sustainable development, to allow equal and overall economic and social development of the Republic of Croatia.

In the observed period, from 2013 until 2018, missed the effective strategic management of special forms of tourism, the planned activities defined by “The Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020”

were not implemented and/or not implemented by scheduled implementation dynamics and therefore the results and impacts of implementation of the “Strategy for Development of Tourism of the Republic of Croatia Until the Year 2020” were outlined.

While the application of strategic marketing thinking in all spheres of economic and social life in developed countries is an unavoidable fact today, in the Republic of Croatia it is still the future we are striving for and toward which this paper was directed. The focus of the social concept of marketing is not only the needs of a particular segment of consumers, but also the needs of the whole society, which means that it is necessary to take into account the necessity to preserve the characteristics of tourist destination in sociological, cultural and ecological sense. To create a concept of tourism development at lower spatial levels, it is essential to thoroughly study and identify the possibility of tourist properties, characteristics and tourist values, and the possibilities of receiving all those resources (natural and social) that will meet the needs of tourists. The fact is that the properties and the characteristics of the resources meet the tourist needs, and in this regard some resources will attract and bind only those segments of tourism demand that will meet its needs and characteristics. This gives us the ability to determine the types and forms of tourism based on the knowledge of these properties, which can be developed in a particular destination.

Tourism as a social phenomenon is extremely dynamic and clearly shows the trend of growth of tourist movements. Tourism of the Republic of Croatia every year is represented by the increasing number of arrivals and overnight stays, while not enough attention is paid to tourism revenues, ie whether tourism revenues adequately measured physical growth of arrivals and overnight stays. Also, the problem that arises is excessive dependence on tourism, primarily on “sun and sea” tourism, which inevitably leads to seasonality. As one of the consequences of extreme seasonality, there is also the problem of lack of adequate workforce in the tourism and hospitality industry. Tourism accounts for almost 20% of the total GDP of the Republic of Croatia. This is risky because of the fact that tourism is extremely sensitive and every major negative impact from the environment can lead to collapse of tourism and thus the economy as a whole. It is therefore necessary that tourism in the Republic of Croatia be considered and strategically managed in a way that will enable the long-term sustainable development of all special forms of tourism, in order to the overall and equitable economic and social development.

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