

Preliminary communication

HOW COMPETITIVE IS TOURIST OFFER OF ADRIATIC CROATIA? ANALYSIS OF CURRENT STATE

Irijana Rajković¹
Sara Fuchs
Marija Vukoja

Abstract

The purpose of this paper is to present the developmental state of Adriatic Croatia's tourist offer, and its contribution in Croatia's competitive positioning on the tourist market. In the paper author presents the characteristics of tourist offer of Adriatic Croatia, respectively what are the tourist's motives for visiting it, and how satisfied they are with the tourist offer. For that purpose, results from the study Attitudes and Expenditures of Tourists in Croatia TOMAS 2022/23 were used, presenting motives and level of satisfaction with the tourist offer. Findings indicate, when it comes to motivation, that Adriatic Croatia is still mostly recognized for its sea and natural resources while lower interest is registered for other elements of tourist offer. Results reflecting tourist's satisfaction are relatively satisfactory, although there is potential for improvement. Based on the findings ideas for improvement have been proposed.

Keywords: Adriatic Croatia, tourist offer, competitiveness

JEL classification: L83, Z32

INTRODUCTION

Tourism represents one of top ten largest industries in the world according to the achieved revenue (Global Sources, 2024) and impacts the world economy significantly. Newest findings from the UNWTO indicate that in 2023 a total of 1,305 million tourist arrivals was registered, which is a 10,9% decrease in relation to 2019 when 1,465 million arrivals were registered. The decrease is the result of the pandemic caused by COVID-19 virus. After ending the travel restrictions, tourist arrivals started registering increase again. According to the regions, Europe remained the leader with 707.4 million arrivals (of which most in the Southern/European Mediterranean, 308.5 million), followed by Asia and the Pacific (237.2 million), Americas (200.1 million), Middle East (93.5 million) and Africa (66.4 million). In terms of the International Tourism Receipts, in 2023 a total of 1,532 billion of USD was registered, a decrease of 1,6% in relation to 2019 when 1,487 billion of USD was registered. Receipts were again highest in Europe in 2023 (662.7 billion of USD, most of which in Southern/European Mediterranean, 291.4 billion of USD), followed by Asia and the Pacific (347.0 billion of USD), Americas (346.7 billion of USD), Middle East (137.4 billion of USD) and Africa (38.2 billion of USD) (United Nations World Tourism Organization, 2024). As visible from previous indicators, in Europe most of the tourist

¹**Irijana Rajković**, Ph.D. Student; **Sara Fuchs**, Ph.D. Student, **Marija Vukoja**, Ph.D. Student, Faculty of Tourism and Hospitality Management, University in Rijeka, Croatia.

turnover is achieved in European Mediterranean area which makes it one of the most relevant world tourism receptive regions, with Croatia being a part of that region (Gračan & Šverko Grdić, 2013; Alkier Radnić et al., 2009). In European tourism flows summer holidays, respectively mass tourism still prevails tremendously. This has also been confirmed by research results published by Statista in 2025. Statista published results of a research conducted on a sample of 11,000 respondents, focused on determining the tourist's travel motives. According to the region, a total of 36% of the respondents from Europe plan to go on several summer holiday, 32% plan on going on one summer holiday, while 32% are not planning on going on a summer holiday at all. Furthermore, 38% of the respondents from Southern Europe and 38% from Eastern Europe are planning to go on several summer holidays, followed by 33% of respondents from Eastern Europe. Majority of the respondents from western Europe (34%), followed by the ones from Southern Europe (33%) and finally Eastern Europe (26%) plan on going on only one summer holiday (Statista, 2025). It is expected that Coastal and Maritime Tourism market will continue to grow at 8.5% CAGR, respectively that it will reach \$1.23 Trillion by 2030, a significant increase in comparison with 2023 when it achieved \$833.6 Billion (For Insights Consultancy, 2024). It is clear from the previous indicators that "3S" (Sun, Sea, Sand) represents one of the most developed forms of tourist offer in Europe. This concept has changed tremendously over the years, far from the traditional concept when sunbathing on the beach was the primary motive for traveling and activity during stay in a destination. European tourists are interested in visiting well developed tourist destinations that offer high-quality and diverse activities. Changes in tourist's preferences resulted in even more growing interest for travels motivated by sun and sea, supplemented by additional products and services like organized same-day trips, wellness packages, etc., combined in a unique "package". Tourists can also make their own package by choosing a particular combination of tourist products and services according to their liking. Growing interest for these types of packages represents a reflection of changing social trends that change the society and the nature of tourist demand (CBI Ministry of Foreign Affairs, 2025; Ivandić et al., 2005, 2-3). Extreme dynamism of the tourism market caused by numerous and fast changes expressed by both tourist offer and demand conditions tourism service providers to seek ways how to stand out on the tourist market and maintain their competitive position. One of the preconditions for achieving success is monitoring tourist's attitudes, with a particular accent on their satisfaction with the tourist offer, and careful adaptation of the tourist offer in accordance with their preferences (Zadel et al., 2018; Gračan, 2011, 185; Stipanović, 2006). The goal is meeting the needs of current tourists, attracting new tourists, and becoming more competitive in the tourist market (Ružić et al., 2006; Vranešević et al. 2008). Adriatic Croatia is a tourist destination in possession of numerous comparative advantages like ideal geographical position which enables excellent communication connecting Eastern, Middle and Western Europe with Mediterranean, vicinity and immediate contact with economically developed regions and countries which represent tourism sources (emissive markets), and appropriate position and vicinity of attractive neighbouring countries with the ability of transit, that can be used for further development of its tourism offer (Alkier et al., 2009). To achieve competitiveness on the tourist market, it is mandatory to track tourist's attitudes and propose ways of

upgrading its offer in accordance with tourist's interests. The purpose of this paper is to present the characteristics of tourist offer of Adriatic Croatia, and tourist's attitudes (their motives of visiting, and level of tourist's satisfaction with the tourist offer of Adriatic Croatia), and based on the findings discuss potential improvements.

1. REVIEW OF THE CHARACTERISTICS OF TOURIST OFFER OF ADRIATIC CROATIA

Republic of Croatia is a European country with a long-term tourist tradition. Its surface covers a total of 21.851 square miles. Surface of Adriatic Croatia covers a total of 3.598 miles (1.104 miles the mainland, and 2,493 miles the islands)(Barišić & Marić, 2012). Its coastal part includes the counties of Dubrovnik-Neretva, Istria, Lika-Senj, Primorje-Gorski kotar, Split-Dalmatia, Šibenik-Knin, and Zadar. According to the Census published in 2021, Adriatic Croatia counts almost 1,3 million of inhabitants. Tourism represents one of the most developed industries in this region, which is visible in the following tables (In my region find out how EU supports your region, n.d.; Croatian Undersea, n.d.; Ministry of Tourism of Republic of Croatia, 2013; State Bureau for Statistics, 2021; NN, 2022).

Table 1. Tourist arrivals in Adriatic Croatia in the period 2019-2023

	2019		
	Total	Domestic	Foreign
Primorje-Gorski kotar	2.966.489	356.143	2.610.346
Lika-Senj	820.648	49.820	770.828
Zadar	1.751.741	230.099	1.521.642
Šibenik-Knin	1.009.451	160.953	848.498
Split-Dalmatia	3.657.001	292.999	3.364.002
Istria	4.481.698	303.954	4.177.744
Dubrovnik-Neretva	2.237.036	124.198	2.112.838
Total Adriatic Croatia	16.924.064	1.518.166	15.405.898
Total Republic Croatia	19.566.146	2.212.658	17.353.488
	2020		
	Total	Domestic	Foreign
Primorje-Gorski kotar	1.323.560	270.558	1.053.002
Lika-Senj	267.856	48.860	218.996
Zadar	799.711	191.635	608.076
Šibenik-Knin	400.046	96.332	303.714
Split-Dalmatia	1.223.590	208.302	1.015.288
Istria	1.736.315	174.601	1.561.714
Dubrovnik-Neretva	455.106	98.591	356.515
Total Adriatic Croatia	6.206.184	1.088.879	5.117.305
Total Republic Croatia	7.001.128	1.455.849	5.545.279
	2021		
	Total	Domestic	Foreign
Primorje-Gorski kotar	2.212.424	389.020	1.823.404
Lika-Senj	484.408	65.380	419.028
Zadar	1.299.326	252.264	1.047.062
Šibenik-Knin	705.002	141.990	563.012
Split-Dalmatia	2.309.054	283.956	2.025.098
Istria	3.372.081	319.471	3.052.610
Dubrovnik-Neretva	967.361	118.740	848.621
Total Adriatic Croatia	11.349.656	1.570.821	9.778.835
Total Republic Croatia	12.775.794	2.134.985	10.640.809

	2022		
	Total	Domestic	Foreign
Primorje-Gorski kotar	2.918.929	416.943	2.501.986
Lika-Senj	651.122	63.135	587.987
Zadar	1.670.127	248.822	1.421.305
Šibenik-Knin	885.556	162.938	722.618
Split-Dalmatia	3.202.719	323.902	2.878.817
Istria	4.583.914	372.962	4.210.952
Dubrovnik-Neretva	1.688.945	154.722	1.534.223
Total Adriatic Croatia	15.601.312	1.743.424	13.857.888
Total Republic Croatia	17.774.958	2.451.209	15.323.749

	2023		
	Total	Domestic	Foreign
Primorje-Gorski kotar	3.071.852	438.915	2.632.937
Lika-Senj	747.112	67.627	679.485
Zadar	1.791.788	268.438	1.523.350
Šibenik-Knin	909.009	174.578	734.431
Split-Dalmatia	3.580.899	345.579	3.235.320
Istria	4.832.877	396.875	4.436.002
Dubrovnik-Neretva	2.000.763	166.438	1.834.325
Total Adriatic Croatia	16.934.300	1.858.450	15.075.850
Total Republic Croatia	19.492.931	2.638.062	16.854.869

Source: State Bureau for Statistics. 2025

Table 2. Tourist overnights in Adriatic Croatia in the period 2019-2023

	2019		
	Total	Domestic	Foreign
Primorje-Gorski kotar	15.284.346	1.198.739	14.085.607
Lika-Senj	2.749.230	129.819	2.619.411
Zadar	9.590.846	1.015.987	8.574.859
Šibenik-Knin	5.512.226	607.264	4.904.962
Split-Dalmatia	17.561.956	973.483	16.588.473
Istria	26.178.763	834.651	25.344.112
Dubrovnik-Neretva	8.051.049	389.016	7.662.033
Total Adriatic Croatia	84.928.416	5.148.959	79.779.457
Total Republic Croatia	89.651.789	6.476.646	83.175.143

	2020		
	Total	Domestic	Foreign
Primorje-Gorski kotar	15.314.671	1.288.395	14.026.276
Lika-Senj	2.856.171	153.360	2.702.811
Zadar	9.868.704	1.122.535	8.746.169
Šibenik-Knin	5.549.445	696.341	4.853.104
Split-Dalmatia	17.966.287	1.074.280	16.892.007
Istria	26.388.645	934.792	25.453.853
Dubrovnik-Neretva	8.333.783	411.627	7.922.156
Total Adriatic Croatia	86.277.706	5.681.330	80.596.376
Total Republic Croatia	91.242.931	7.095.300	84.147.631

	2021		
	Total	Domestic	Foreign
Primorje-Gorski kotar	7.824.289	1.019.656	6.804.633
Lika-Senj	1.330.923	162.321	1.168.602
Zadar	5.474.422	1.005.817	4.468.605
Šibenik-Knin	2.709.092	508.278	2.200.814
Split-Dalmatia	7.879.561	953.480	6.926.081
Istria	11.452.784	597.613	10.855.171
Dubrovnik-Neretva	2.407.399	399.139	2.008.260
Total Adriatic Croatia	39.078.470	4.646.304	34.432.166

Total Republic Croatia	40.794.455	5.415.391	35.379.064
2022			
	Total	Domestic	Foreign
Primorje-Gorski kotar	12.446.206	1.395.245	11.050.961
Lika-Senj	2.213.140	204.009	2.009.131
Zadar	8.276.797	1.249.104	7.027.693
Šibenik-Knin	4.383.093	662.919	3.720.174
Split-Dalmatia	13.473.405	1.204.742	12.268.663
Istria	21.734.119	1.029.654	20.704.465
Dubrovnik-Neretva	4.704.438	465.641	4.238.797
Total Adriatic Croatia	67.231.198	6.211.314	61.019.884
Total Republic Croatia	70.201.959	7.354.132	62.847.827
2023			
	Total	Domestic	Foreign
Primorje-Gorski kotar	15.512.719	1.409.708	14.103.011
Lika-Senj	2.815.862	194.127	2.621.735
Zadar	10.066.168	1.150.360	8.915.808
Šibenik-Knin	5.226.083	680.259	4.545.824
Split-Dalmatia	17.085.151	1.245.131	15.840.020
Istria	27.690.426	1.131.746	26.558.680
Dubrovnik-Neretva	7.210.748	547.327	6.663.421
Total Adriatic Croatia	85.607.157	6.358.658	79.248.499
Total Republic Croatia	90.040.177	7.752.665	82.287.512

Source: State Bureau for Statistics. 2025

According to the data from the previous tables, it is visible that an increase in both tourist arrivals and overnights in (Adriatic) Croatia has been registered up until 2020, the year of the outbreak of the pandemic caused by the virus COVID-19. After reopening the state borders, tourist arrivals and overnights started to register growth once again, indicating a strong recovery. Foreign tourists make the most significant share of tourist turnover, which indicates that (Adriatic) Croatia is very much recognizable on the international tourist market (Alkier et al., 2021). This is in accordance with the latest Strategy of Development of Sustainable Tourism until 2030 (NN, 2023) of the Republic of Croatia which states that Coastal Tourism (“Sun and Sea”) still belongs in the group of dominating tourist products. It is based on richness of natural resources (clean Adriatic Sea, rich flora and fauna, pleasant climate, one of the most indented coasts in the world, large number of sunny days, etc.), cultural-historical heritage, and other elements (Alkier Radnić, 2005; NN, 2023). However, other forms of tourist offer are also developed in this region. To gain a better understanding of the structure of Coastal tourist product, in the following table characteristics of tourist offer of Adriatic Croatia are presented.

Table 3. Characteristics of tourist offer of Adriatic Croatia

County	Characteristics of tourist offer
Dubrovnik-Neretva	Natural resources (rich flora and fauna, clean sea and air), cultural-historical heritage (Dubrovnik walls, the city of Korčula, Ston walls), cultural festivities based on cultural-historical tradition (Festival of Saint Blaise, Moreška sword dance, old knight's dance Kumpanija, traditional dance Lindo...), sports activities (water activities (swimming, skiing, surfing, sailing, spearfishing), sports activities (cycling, horseback riding, kayaking, walking, hiking, fishing, scuba diving), food and beverage offer (Mediterranean cuisine and tradition (fresh fish, sea food, olive oil, garlic, smoked ham Dalmatian style, various types of cheese, traditional desserts, etc., visiting wineries and exploring wine offer), other activities (organised field trips

	and charters, staying in rural family households). Natural resources (sea, climate, flora and fauna, rivers), cultural-historical heritage (geological paleolithic sites, prehistoric archaeological sites, early Christian monuments, Roman legacy, Istrian castles, cultural sights, museums and collections, churches, Glagolitic...), sports activities (snorkeling, cycling, trails, kayaking, sailing, windsurfing, climbing, speleo adventures, paragliding, adrenaline parks, Go-kart, Quad & Paintball, Golf, horseback riding, fishing, hunting), food and beverage offer (gastronomic delicacies offered in restaurants, wine roads, olive oil roads, cheese roads, honey spots, craft beers, brandys, truffle searching...), other activities (sunbathing, nautical tourism, visiting light houses, entertainment parks, events and festivals (sports, culture), organizing weddings, health and beauty (medical and wellness tourism offer)
Istria	Natural resources (lakes, rivers, mountain Velebit, part of island of Pag, climate, flora and fauna), cultural-historical heritage (festivals and manifestations, museums, sanctuary, pilgrimage), sports activities (cycling, walking, hiking, hunting and fishing, speleo tourism, adrenaline sports, winter sports, water activities), food and beverage offer (traditional dishes based on domestic ingredients like fish, olive oil, rosemary, sage, lamb, smoked ham, cheese, milk, potato, cabbage, corn, etc.), other activities (festivals and manifestations of sports, cultural character, visiting national parks)
Lika-Senj	Natural resources (sea, climate, flora and fauna, mountains, rivers, lakes), cultural-historical heritage (organizing events, festivals and manifestations, religious tourism, city tourism, museums and theatres, maritime heritage, cultural tours...), sports activities (hiking and walking, cycling, snorkeling and scuba diving, hunting and fishing, winter sports, adrenaline sports, watching animals, sports preparations, car moto...), food and beverage offer (traditional dishes based on fish, sea fruits, olive oil, garlic, various types of meat, mushrooms...), other activities (family holidays, short holiday, short tours, touring, organized field trips, offer of business tourism (team building, Incentives, congresses i symposiums), health tourism (wellness, wellbeing, thalasso, medical), nautical tourism (itineraries, regattas), organizing sports manifestations, gastronomic manifestations based on tradition)
Primorje-Gorski kotar	Natural resources (sea, climate, flora and fauna), cultural-historical heritage (manifestations, museums, galleries, library, antique squares, fortresses, theatre, storytelling...), sports activities (walking, hiking, cycling, canoeing, rafting, horseback riding, jet ski, fishing, sea paragliding, pedaling...), Food and beverage offer (diverse offer based on traditional recipes and ingredients typical for Mediterranean cuisine, offer of wines), other activities (nautical tourism, rural tourism (staying in eco-etno villages, exploring nature, gastronomic and oenology offer...), religious tourism (visiting churches, convents, cathedrals, chappels...), health tourism (wellness), events (cultural, gastronomic), business tourism (events, incentives...)
Split-Dalmatia	Natural resources (sea, forests, climate, rivers, lakes, islands, natural parks...), cultural-historical heritage (archaeological findings, fortresses, churches, convents, museums...), sports activities (snorkeling and scuba diving, cycling, free climbing, windsurfing, hiking and walking, sailing, bungee jumping...), Food and beverage offer (diverse offer based on traditional recipes and ingredients typical for Mediterranean cuisine, offer of wines), other activities (organized field trips, visits to theme park, organizing of events (regattas, gastronomic), health tourism (wellness, dental tourism), business tourism (organizing conferences, business meetings, team building...)
Šibenik-Knin	Natural resources (sea, forests, climate), Cultural-historical heritage („Sea Organ and Sea Salutation“, forts, monasteries and remains, religious buildings, crafts and customs, UNESCO heritage, museums), Sports activities (climbing, speleology, water activities (river, sea), hiking, scuba diving and snorkeling, cycling, windsurfing and kitesurfing, rafting), Food and beverage offer (food and beverage offer (diverse offer based on traditional recipes and ingredients typical for Mediterranean cuisine), oenology, other activities (family holidays, visiting national and natural parks, etc.).
Zadar	

Source: Tourist Board of County of Dubrovnik-Neretva (n.d.; 2023); Tourist Board of County of Primorje-Gorski kotar (n.d.); Tourist Board of County of Zadar (n.d.); Tourist Board of Istria (n.d.); Tourist Board of Lika-Senj (n.d.); Tourist Board of Šibenik-Knin (n.d.); Tourist Board of Split-Dalmatia (n.d.).

From the data presented in the previous table, it is visible that Adriatic Croatia is rich in natural resources, as well as in cultural and historical heritage of high value, on which it bases its identity and tourist offer. Of the natural resources, it is necessary to emphasize the pleasant Mediterranean climate, clean air, clean sea, rivers, rich flora and fauna, etc. Official websites of Ministry of Culture and Media of Republic of Croatia (n.d.) show that the presence of tangible and intangible heritage of Adriatic Croatia on the UNESCO list, such as Lacemaking, Two-part Singing and Playing in the Istrian Scale, Festivity of St. Blaise, Patron Saint of Dubrovnik, Procession Za Križen (Following the Cross) on the Island of Hvar, Klapa multipart singing of Dalmatia, Ojkanje singing, Mediterranean cuisine, etc. Gastronomic and oenologic offer also represent an integral element of an Adriatic Croatia's tourist product, especially since it provides tourists new experiences. Tourists can taste traditionally prepared dishes and wines characteristic for a particular coastal destination and make memories that might stimulate them to revisit in the future (Drpić et al., 2020). To be able to provide tourists new and high-quality experiences, it is important to monitor their attitudes (with a particular accent on their motives and level of satisfaction) and based on the findings make adaptations while preserving the authenticity of tourist offer of Adriatic Croatia.

2. METHODOLOGY

In this paper selected results of the study Attitudes and consumption of tourists in Croatia TOMAS Croatia 2022/2023, conducted by Institute of Tourism Zagreb are presented. In its preparation a structured questionnaire was applied, and data was collected through personal interview with the help of computers or tablets (CAPI-computer aided personal interview) in destinations of Adriatic Croatia. Total of 8.893 tourists who stayed in destinations of Adriatic Croatia participated in the research. Methods of Descriptive Statistics were applied.

3. RESULTS AND DISCUSSION

Within this chapter the authors will present the results of the comparative analysis of the results, as well as the discussion based on the findings.

According to the *age group*, most of the respondents belonged to the age group 36-45 (34,0%), followed by the age group 26-35 (26,5%), 46-55 (20,6%), and 56 and more (13,7%). Only 5,2% of the respondents belonged to the age group up to 25 years. According to their *level of education*, most of the tourists who visit Adriatic Croatia are highly educated 41,3% with a university diploma or higher, after which follow tourists with a two-year college diploma (38,9%), while 19,7% of the respondents have a secondary school degree or less. An insight into the household monthly income of tourists who visit Adriatic Croatia shows that they possess a high purchasing power. Total of 20,8% of them have 3.501-4.000 EUR of household monthly income. After them follow the respondents with 3.001-3.500 EUR (20,1%), 2.501-3.000 (15,8%), 5.001 and more (12,1%), 4.001-5.000 (12,0%), 2.001-2.500 (11,3%), 1.501-

2.000(5,1%), 1.001-1.500 (2,2%), 501- 1.000 (0,5%) and up to 500 (0,1%). Indicators showing *tourist's visiting frequency to Adriatic Croatia* for a holiday show that they are very loyal. A total of 44,6% of the tourists expressed that they visited 7 and more times, after which follow tourists who have visited 3-6 times (26,6%), first time (14,9%) and 2 times (13,9%). In terms of the *Number of overnights*, during their stay shows that a total of 44,2% of tourists stays in Adriatic Croatia in duration of 4-7 days, followed by the 23,3% who stayed 8-10 days, 11-14 days (16,7%), 15-21 (8,8%), 1-3 (5,1%), 22-28 (1,0%) and 29 and more days (0,8%)(Institute for Tourism, 2023, 30-39).

Table 4. Motives of arrival to Adriatic Croatia

Rank	Motives	2022/2023
1	Sea	83,2
2	Nature	63,1
3	Towns (city break)	19,0
4	Gastronomy	18,5
5	Touring/sightseeing	11,4
6	Entertainment and festivals	9,0
7	Culture and arts	8,8
8	Manifestations and events	8,4
9	Sports and recreation	8,0
10	Villages/rural areas	4,6

Source: Institute for Tourism (2023, 33)

Notes: table presents only first ten motives. Respondents had the option of choosing multiple answers.

An insight into the motives for visiting Adriatic Croatia shows that tourists tend to visit due to its clean blue sea (83,2%), and nature (63,1%). Lower level of motivation was expressed for visiting towns (city break) (19,0%), gastronomic offer (18,5%), touring/sightseeing (11,4%), entertainment and festivals (9,0%), culture and arts (8,8%), attending manifestations and events(8,4%), sports and recreation (8,0%) and visiting villages and rural areas (4,6%).

Table 5. Level of satisfaction with elements of tourism destination

Rank	Level of satisfaction	%
1	Beauty of nature and landscape	92,9
2	Beauty of the destination	92,7
3	Overall stay	92,4
4	Personal safety	92,1
5	Atmosphere	90,9
6	Beach cleanliness	89,2
7	Accommodation facility	88,9
8	Maintenance of the destination	88,7
9	Ecological preservation of the place	88,6
10	Hospitality of the local population	88,0
11	Gastronomic offer in destination	87,1
12	The possibility of quality movement in the destination	86,0
13	Destination suitable for children	85,8
14	Information available in the destination	84,8
15	Free Internet in destination	84,4
16	Equipment/arrangement of the beaches	84,3
17	Walking paths	84,3
18	Marked heritage sites	83,7
19	Culture and art	83,3

20	Traffic accessibility of the destination	83,1
21	Offer of organised trips/excursions to surrounding area	82,6
22	Information/education in protected nature areas	81,9
23	Adaptation of the destination to people with special needs	81,5
24	Sports facilities	81,0
25	Entertainment/nightlife	80,0
26	Events and manifestations	79,4
27	Cycling routes and paths	79,0
28	Shopping options	77,6
29	Local public transport	76,8
30	Traffic in destination	67,1

Source: Institute for Tourism (2023, 43)

The data in the previous table indicate tourists being very satisfied with tourist offer of Adriatic Croatia, considering that only events and manifestations (79,4%), cycling routes and paths (79,0%), shopping options (77,6%), local public transport (76,8%) and traffic in destination (67,1%) were marked with an average mark.

Table 6. Possibility of recommendation to friends, family or colleagues

Possibility of recommendation	%
Most likely	59,7%
Possibly	37,7%
Unlikely	2,7%

Source: Institute for Tourism (2023, 44).

The results indicating tourist's intention of possible recommendation of Adriatic Croatia as a holiday destination to friends, family or colleagues could be considered as unsatisfactory, considering that only 59,7% of respondents stated that they will most likely recommend it as a holiday destination, 37,7% stated that they might be interested in recommending Adriatic Croatia as a holiday destination, while 2,7% stated that it is unlikely they will recommend.

Information presented in this part of the paper clearly indicate that Adriatic Croatia has all the necessary comparative advantages for developing more competitive tourist offer on the international tourist market. Results presenting the motives indicate that tourists primarily visit Adriatic Croatia due to its sea and natural resources, while interest for other elements is much lower. Results for satisfaction indicate that tourists are (very) satisfied since offer of events and manifestations, cycling routes and paths, local public transport and traffic in destination were the only ones marked with an average mark.

In accordance with the findings, the following activities focused on improvements of tourist offer of Adriatic Croatia are suggested (Ivanović et al., 2015, 304 according to Ministry of Tourism of Republic of Croatia, 2013; Milojica & Čapeta, 2018, 315; ZADRA nova Agency for Development of Zadar County, 2016; Ministry of Tourism of Republic of Croatia, 2022):

- analyzing attitudes of tourists who visit Adriatic Croatia, with a particular accent on their motives and satisfaction with services;
- adaptation of structure of current tourist offer according to their liking and interests while at the same time remaining authentic. The offer must be of diverse and of high quality;

- accommodation capacities represent an important part of tourist's experience, so necessary investments need to be made further to provide them maximum experience;
- beaches represent an important element of tourist offer of Adriatic Croatia where a significant number of tourists spend a lot of their time during their stay in a destination. Further attention needs to be paid on their equipping and cleanliness);
- improvement of destination's accessibility through traffic organization and organization of local transport;
- upholding sustainability principles represents a significant advantage for successful business and attracting ecologically aware tourists (preservation of natural and cultural-historical resources, provision of accommodation in eco-friendly hotels, etc.);
- investing in further development of Adriatic Croatia's tourist offer in a way that it is developed equally throughout the entire region. Collaboration of destination stakeholders needs to be well planned and coordinated;
- improvements in tourist infrastructure (cycling routes and paths, etc);
- specific forms of tourism represent an important part of Adriatic Croatia (cultural, nautical, gastronomic, ecotourism, etc.) and need to be developed accordingly. Particular accent should be paid to the organization of cultural events that present the destination's tradition and heritage;
- tourists that are loyal to the destination and particular accommodation provider like to be recognized for that, which is why it is important to develop and implement loyalty programs for them;
- providing accurate and precise information during their stay in the destination is important, which is why they need to be provided onsite and online;
- improvement of knowledge of tourism and hospitality employees;
- introduction and active implementation of new technologies and innovations that will enable business to do their work more efficiently and provide tourists better experiences;
- promoting advantages of tourism development for the destination and domestic population, and stimulating them to be more welcoming towards tourists;
- forming and implementing appropriate marketing activities to achieve greater recognizability on the international tourist market.

Their active implementation will contribute in Adriatic Croatia achieving greater success on the tourist market and becoming more competitive.

CONCLUSION

This paper presents the characteristics of tourist offer of Adriatic Croatia, as well as the motives and satisfaction of tourists who chose to visit it. Theoretical background indicates clearly that Adriatic Croatia has significant comparative advantages based on which it is possible to develop even more competitive tourist offer. Results presenting tourist's attitudes indicate that they are still extremely motivated by sea and natural resources while others elements remain insufficiently recognized. Results presenting their satisfaction indicate that they are satisfied with most of the elements, however some lacks are still very much present. Based on the findings ideas for improvement

are proposed. Their implementation will contribute to further improvement of tourist offer and its more successful placing on the international tourist market.

REFERENCES

- Alkier Radnić, Romina, Daniela Gračan, and Vedran Milojica. Tourism Features within the European Union with special attention paid to Croatia. In *Proceedings of 7th International Conference Economic Integrations, Competition and Cooperation*, April 02–03, 2009, 1–14, Opatija, Croatia.
- Alkier Radnić, Romina. 2005. Pretpostavke uspješnijeg uključivanja Hrvatske u turizam EU. *Tourism and Hospitality Management* 11 (2): 163-167.
- Alkier, Romina, Đorđe Mitrović, and Vedran Milojica. Presentation of the state of Croatian tourism in the conditions caused by COVID-19 Pandemic. In *Proceedings of International Scientific Conference Emerging Trends in Global and National Economy : Proceedings of the International Scientific Conference 2021*, October 14, 2021, 147-158, Faculty of Economics, University of Niš.
- Barišić, Petra, & Ivana Marić. 2012. The role of management as a strategic tourism guideline – Case of Croatia. *International journal of business and management studies* 1 (2): 423-431.
- CBI Ministry of Foreign Affairs. 2025. *The European market potential for sun and beach tourism*. <https://www.cbi.eu/market-information/tourism/sun-beach-tourism/market-potential> (accessed: March 16, 2025).
- Croatian Undersea. n.d. *About Croatia*. http://www.ronjenjehrvatska.com/hr/o_hrvatskoj (accessed: April 1, 2025).
- Drpić, Danijel, Angela Milenkovska Klimoska, and Dino Manestar. Contribution of gastronomic tourism for achieving competitiveness of Croatian coastal destinations. In *Proceedings of 25th Biennial International Congress Tourism & Hospitality Industry 2020: Trends and Challenges*, May 04–06, 2020, 107–120, Opatija, Croatia.
- For Insights Consultancy. 2024. *Coastal and Maritime Tourism Market Trend Analysis By Type (Cruise Tourism, Yachting and Sailing Tourism), By Application (Passenger Tickets Service, Onboard and Other Service) & Region (North America, Europe, APAC, MEA, South America)- Global Forecast to 2030*. <https://www.forinsightsconsultancy.com/reports/coastal-and-maritime-tourism-market> (accessed: March 17, 2025).
- Global Sources. 2024. *Top 10 World's Largest Industries by Revenue in 2024*. <https://www.globalsources.com/knowledge/top-10-world-s-largest-industries-by-revenue-in-2024/> (accessed: March 16, 2025).
- Gračan, Daniela, and Zvonimira Šverko Grdić. Contemporary Tourism Trends in World and Mediterranean. In *Proceedings of 4th Scientific and Professional Conference Current Issues in Croatian Maritime Law, Law of the Sea, Law in Tourism, Civil and Administrative Law in Memoriam of Prof. Dr. Sc. Vjekoslav Šmid*. June 06–08, 2013, 385-398, Split, Croatia.
- Gračan, Daniela, Romina Alkier Radnić, and Maja Uran. 2011. *Strategic directions of nautical tourism in the European Union*. Opatija: Faculty of Tourism and Hospitality Management.

- In my region find out how EU supports your region. n.d. *Adriatic Croatia*. <https://what-europe-does-for-me.europarl.europa.eu/hr/region/HR03> (accessed: March 20, 2025).
- Ivandić, Neven, Neda Telišman-Košuta, Sanda Čorak, & Damir Krešić. 2005. Summer Holiday Tourism. In *Croatian Tourism Blue white green*. Ed. Sanda Čorak and Vesna Mikačić, 1–37. Zagreb, Croatia: Institute for Tourism.
- Ivanović, Slobodan, Ace Milenkovski, and Vedran Miložica. 2015. Croatian Tourism and Hospitality Industry: Current State and Future Developmental perspectives. *UTMS Journal of Economics* 6 (2): 293–305.
- Miložica, Vedran, and Ivan Čapeta. An insight into the current motives of tourist visitors of the Zadar county. In *Proceedings of ICESOS'18 International conference on economic and social studies Regional economic development contemporary trends in tourism and hospitality industry in the Balkan region*, April 10–11, 2018, 307–316, Sarajevo, Bosnia and Herzegovina.
- Ministry of Culture and Media of Republic of Croatia. n.d. *Intangible assets inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity*. <https://min-kulture.gov.hr/izdvojeno/kulturna-bastina/vrste-kulturne-bastine/nematerijalna-kulturna-bastina/nematerijalna-dobra-upisana-na-unesco-ov-reprezentativni-popis-nematerijalne-kulturne-bastine-covjecanstva/5337> (accessed: April 1, 2025).
- Ministry of Tourism of Republic of Croatia. 2013. *Strategy of Tourism Development until 2020*. <https://mint.gov.hr/UserDocsImages/arhiva/130426-Strategija-turizam-2020.pdf> (accessed: April 1, 2025).
- NN (2023). Strategy of Development of Sustainable Tourism until 2030. https://narodne-novine.nn.hr/clanci/sluzbeni/full/2023_01_2_18.html (accessed: April 1, 2025).
- Ružić, Pavlo, Desimir Bošković, and Marko Simonetti. 2006. Tourist Expectations and satisfaction with the tourist offer in Istria. In *Proceedings of 18th Biennial International Congress Tourism & Hospitality Industry 2006: New Trends in Tourism and Hospitality Management*, May 03 – 05, 2006, 746-751, Opatija, Croatia.
- State Bureau for Statistics. 2021. *Final results of the 2021 Census published*. <https://dzs.gov.hr/vijesti/objavljeni-konacni-rezultati-popisa-2021/1270> (accessed: April 1, 2025).
- State Bureau for Statistics. 2025. *Tourist arrivals and overnights*. https://web.dzs.hr/PX-Web.asp?url=%22Hrv/Archive/stat_databases.htm%22 (accessed: April 1, 2025).
- Statista. 2025. *Share of adults who planned to go on a summer holiday in Europe in 2024, by region*. <https://www.statista.com/statistics/1470623/summer-holiday-intentions-europe-by-region/> (accessed: April 1, 2025).
- Stipanović, Christian. 2006. Concept and strategy of development in tourism. Opatija: Faculty of Tourism and Hospitality Management.
- Tourist Board of County of Dubrovnik-Neretva. 2023. *Brochure*. <https://visitdubrovnik.hr/wp-content/uploads/2023/10/brosura-HR-2023-web-spread.pdf> (accessed: April 1, 2025).

- Tourist Board of County of Dubrovnik-Neretva. n.d. *Home Hr.* <https://visitdubrovnik.hr/hr/> (accessed: April 1, 2025).
- Tourist Board of County of Primorje-Gorski kotar. n.d. *Main pages.* <http://www.kvarner.hr/turizam> (accessed: April 1, 2025).
- Tourist Board of County of Zadar. n.d. *Main pages.* <https://www.zadar.hr/hr> (accessed: April 2, 2025).
- Tourist Board of Istria. n.d. *Main pages.* <https://www.istra.hr/hr> (accessed: April 2, 2025).
- Tourist Board of Lika-Senj. n.d. *Main pages.* <https://visit-lika.com/> (accessed: April 2, 2025).
- Tourist Board of Split-Dalmatia. n.d. *Main pages.* <https://www.dalmatia.hr/hr/> (accessed: April 2, 2025).
- Tourist Board of Šibenik-Knin. n.d. *Main pages.* <https://www.dalmatiasibenik.hr/> (accessed: April 2, 2025).
- United Nations World Tourism Organisation. 2024. *International Tourism Highlights, 2024 Edition.* <https://www.e-unwto.org/doi/10.18111/9789284425808> (accessed: April 1, 2025).
- Vranešević Tihomir, Miroslav Mandić, & Sandra Horvat. 2008. Customer Orientation as Prerequisite for Success in Tourism and Hospitality Industry. In *Proceedings of 19th Biennial International Congress "Tourism & Hospitality Industry 2008": New Trends in Tourism and Hospitality Management*, May 07 – 09, 2008, 1157–1164, Opatija, Croatia.
- Zadel, Zrinka, Daniela Gračan, and Vedran Milojica. 2018. Beaches as a Factor in Achieving Competitiveness of a Tourist Product-Case Study: Istrian County. *Scientific Journal of Maritime Research* 32 (1): 102-114.
- ZADRAnova Agency for Development of Zadar County. 2016. *The Main Developmental Plan of Tourism of Zadar County 2013-2020.* <https://www.zadra.hr/wpcontent/uploads/2013/01/GP-razvoja-turizma-Zadarske-zupanije-FINAL-svibanj-2014.pdf> (accessed: April 1, 2025).