

Potential of Croatia as an Attractive Tourist Destination for the Russian Market

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Abstract—Europe is one of the most popular tourist destinations in the world, in which tourism occupies a significant place among the most relevant economic activities, and this applies to the Republic of Croatia as well. Based on this study, the authors intended to encourage and support the creation of an effective tourism policy in Croatia that would be based on the profiling of certain target groups. Another objective was to compare the results obtained from the customer analysis with the market analysis of the tourism industry in Croatia. The objective is to adapt the current tourist offer according to the identified needs and expectations of a particular tourist group in order to increase the attractiveness of Croatia as a tourist destination and motivate greater attendance of the targeted tourist groups. The current research was oriented towards the Russian market as the target group. Therefore, the authors wanted to encourage a discussion on how to attract more Russian guests. Consequently, the intention of the research was a detailed analysis of Russian tourists, in order to gain a better understanding of their travelling motives and tendencies. Furthermore, attention was paid to the expectations of Russian customers and to compare them with the Croatian tourist offer, and to determine whether there is a possibility for an overlap. The method used to obtain the information required was a survey conducted among Russian citizens about their travelling habits. The research was carried out on the basis of 166 participants of different age, gender, profession and income group. The sampling and distribution of the survey took place between May and July 2016. The results provided from the research indicate that Croatian tourism has certain unrealized potential considering the popularization of Croatia as a tourist destination, and there is a capacity for increasing the revenues within the group of Russian tourists. Such a conclusion is based on the fact that the Croatian tourist offer and the preferences of the Russian guests are compatible, i.e. they overlap in many aspects. The results demonstrate that beautiful nature, cultural and historical heritage as well as the sun and sea, play a leading role in attracting more Russian tourists. It is precisely these elements that form the three pillars of the Croatian tourist offer. On the other hand, the profiling revealed that the most desirable destinations for the Russian guests are Italy and Spain, both of which provide the same main tourist attractions as Croatia. Therefore, the focus of the strategic ideas given in the paper shifted to other tourism segments, such as type of accommodation, sales channels, travel motives, additional offer and seasonality etc., in order to gain advantage in the Russian market, the Mediterranean region and tourism in general. The purpose of the research is to serve as a foundation for analysing the attractiveness of the other tourist destinations in the Russian market, as well as to be a general basis for a more detailed profiling of the various specific target groups of the Russian and other tourist groups.

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Keywords—Croatia, Russian market, target groups, tourism, tourist destination.

I. INTRODUCTION

IN a world of fast globalization, tourism is proving to be a potentially lucrative branch of the economy, as people around the world are getting more mobile and travel more often, stimulated by both personal and business reasons. Considering the natural beauties, diverse natural basis, the general level of security in the country and a favourable geographical position, Croatia already possesses an extremely fertile basis for the successful development of tourism and positioning at the very top of the most visited destinations. Taking into account the unfavourable economic situation in the country and the still present signs of crisis, it can be said that the tourist industry in Croatia is more important than ever. In a sea of industries with negative growth rates and ongoing difficulties, tourism stands out with a ceaseless growth and noticeable benefits for the Croatian state budget. Among EU country members, Croatia is the one which is most dependent on tourism, as this particular industry has a much larger share in the overall GDP of the country compared to other European countries.

Over the last decades, the tourism industry has been developing in different directions. Consequently, natural beauty does not constitute the only and sometimes not the most important prerequisite for the success of tourism in a certain country. Therefore, Croatia cannot base its overall tourism policy on natural beauties alone, especially when bearing in mind the strong competition in the rest of Europe. Although the Croatian tourism sector can be assessed as a successful one, the question is: How much more unrealized potential and opportunities to maximize the results exist? Comparing the Croatian revenues to those of the competition [1] in this economic sector, with regard to the natural foundation that Croatia has, it seems there remains a lot of unused capacity for the popularization of Croatia as a tourist destination and to increase tourism revenues.

In addition to a more effective tourism policy of the state, expanding the tourist offer etc. is one of the methods for increasing the attractiveness of Croatia as a tourist destination. Creating profiles of certain groups of potential guests could lead to a more effective tourism strategy and, consequently, result in a higher number of tourist visits. The guests of different nationalities and social groups come from a distinct cultural and income background. Therefore, they do not share the same needs and expectations. That is why it could be beneficial to have an individual strategic approach towards

various tourist groups. The subject of this research was the realization of the additional tourism potentials through the profiling of tourists. Given the large spectrum of nationalities of the tourists who visit Croatia [2], this paper was directed toward Russian tourists, who form a smaller percentage, but possess all the characteristics to become very desirable guests in greater numbers.

The purpose of the research was a detailed analysis of Russian tourists, in order to gain a better understanding of their motives in choosing a tourist destination, and the time of the year in which they most commonly travel. Russian tourists are visiting Croatia in small numbers, but they belong to the group of top tourism spenders. Finally, one should understand the impact of the limitations imposed by the geopolitical factor that is not directly related to the tourism industry, but indirectly may have a significant effect on it. The objective of the research was to compose a complete profile of the Russian tourist, using all available literature and conducting a research study. The obtained profile was followed by a comparison of the compatibility of the Croatian tourist offer with the gathered results. Consequently, it was possible to evaluate the potential of Croatia as a tourist destination for the Russian market and to propose actions that would allow for a better introduction of Croatia to the Russian market.

One of the intentions of the research was to involve as many parties that are related either to the Russian tourist market or the Croatian tourism, or have any information that could provide a more complete perspective on the topic. The aim was to detect those areas which can be improved in order for Croatia to be more attractive to Russian guests. In the interest of the research results being applicable, attention was directed to the improvements and modifications which are realistic and possible, and which do not implicate substantial changes in the already successful tourism policy or shift it in a completely different direction, which would lead to a loss of time and years of creating an advantage and developing certain effective concepts.

II. METHODS

The current study was conducted among Russian citizens (living in the Russian Federation), which was the main criteria and the only mandatory precondition to participate in the research, as it was concentrated only on the Russian market. Other factors, such as gender, age, profession, income, etc. were not filtered, because the study was general and oriented to the entire Russian population. Age, income, profession and similar aspects were not categorized nor separately analysed in the results. Age and gender were registered, but not separated into different analysis groups. The reason for not taking into consideration different ranges of the criteria is the purpose of this study, which intends to offer a broad profile which can be applied to any Russian tourist and serve as a background for further more specific and targeted studies in this tourist market. The research was made on the basis of 166 participants, all Russian citizens, belonging to different age, gender, profession and income groups. With regard to the age range, the intention was to include participants of different age

groups. The youngest participants are 19 years old, and the oldest 66 years. Most of them belong to the younger age groups of 21-30 (years) and 31-40 (years). These two age groups include more than 50% of the participants. The average age of the participants is 33.9 years. Previous studies demonstrated that preferences and selection in travelling change with regard to the age group of the tourist. The recommendation for further studies is to focus the research on a certain age group and then analyse separately the results and differences between the participants of the various age categories.

The percentage of the participants who have visited Croatia at least once is 25%; 77% having visited Croatia once, 13% twice and 10% having visited Croatia three times. It was significant that at least one fourth of the participants have first-hand experience with the Croatian tourist offer, to enable insight in the elements they especially enjoyed during their travel, but also to express their opinions about those which they would single out as a negative experience.

The study was conducted in the form of a questionnaire in the Russian language. This method was chosen because it was the most appropriate type of survey for this particular research and the fastest way to collect the information needed for the analysis. The questionnaire contains a combination of 17 relevant items (questions) which were selected to build a profile of a Russian tourist and to provide the important information for understanding their perspective about Croatia as a possible tourist destination. The questionnaire consisted of closed questions in the form of multiple choice and open questions allowing for a more detailed response. The closed questions were used to elicit an exact answer (from the few possible choices offered), and addressed a certain topic in the focus of the study. The open form was selected for the questions where the intention was to observe the first idea which comes to mind to the respondent, without affecting the participant's answer in any manner. The criteria for determining the efficient number of items was the length of the questionnaire. On the one hand, the survey cannot be very long, because the participants will not be motivated to answer the questions, or they may become distracted and fail to complete it. On the other hand, the questionnaire needed to contain enough questions to provide sufficient results for an adequate analysis. The questionnaire also gathered information about the gender, age and previous visits to Croatia of the respondents.

Participation in the study was anonymous to encourage respondents to express their opinions honestly and directly. However, the questionnaire was distributed and filled out in reliable and controlled conditions and the authenticity of the participants is guaranteed. Considering that the level of knowledge and fluency in English of the participants is unknown, the questionnaire was presented to them in the Russian language to avoid any misunderstandings and ambiguities.

III. RESULTS

The 17 questionnaire items can be divided into three

different categories, but without strict borders between them. One category refers to the travelling habits of the Russian tourists, regardless of the concrete destination. The second group is related to the considerations and actions they usually undertake before choosing their destination and travelling. The third category is concentrated particularly on Croatia as a tourist destination.

With regard to searching for information about possible travel destinations more than half of the respondents declared that online websites (61.2%) were their preferred choice. Travel agencies occupy second place with 24.2%, while friends and acquaintances as a source of information are in third place with 11.5%. Only 3.1% of the participants marked previous experiences as their first choice when making decision about travelling.

Considering the sales channels the results show that more than half of the participants (62%) in the study choose travel agencies as a channel they mostly use to make travel reservations. If these results are compared to the previous question, it can be concluded that most of the Russian tourists inform themselves online about the possible destinations to visit, but when it comes to booking and making the final arrangements such as hotel, transfers, etc. they prefer to use the services of travel agencies. Online channels are in second place with 22.3%; while still representing a high percentage, it is incomparable to the 62.1% which puts travel agencies as a stable leader in this category. Meanwhile, 11.4% of the respondents prefer to contact and make arrangements directly with the providers of the services, and only 3% tend to book accommodation or other tourist services on the spot, after arriving at their destination. This result was expected, as it is highly risky, especially in case of long distance trips. A small percentage of the respondents (1.2%) selected "Other" with regard to the question related to making holiday bookings and travel arrangements.

The type of accommodation and other services differs according to the type of tourist making the selection. For example, families, the elderly, and young solo travellers are not likely to prefer the same type of vacation; families tend to book all-inclusive hotels, while the elderly people prefer to travel during the spring and autumn, etc. The results show that most Russian tourists travel with their family (62.7%). They also often travel with friends (23.5%). They tend to travel less in the company of the boyfriend or girlfriend (6.6%) and even less alone (5.4%) or with business partners (0.6%). 1.2% of the participants answered "Other".

The analysis of the data provided by the respondents showed that a substantial majority (84.9%) marked hotels as a primary choice of accommodation when they travel as a tourist. The division of the other possible answers is: private apartments or rooms (8.5%), hostels (3%), camps (1.2%), yachts and cruise ships (1.2%), and other (1.2%). Furthermore, considering that the percentage of tourists booking a hotel is very high, it is interesting to observe which hotel category they mostly stay at while on vacation. The results of the questionnaire show that 4-star hotels were the most popular hotel accommodation choice (53.8%), followed by 3-star

hotels (27.3%), 5-star hotels (17.5%) and finally 2-star hotels (1.4%). This question was given only to the participants who chose "hotels" as their most common accommodation choice when travelling (84.8% of the total participants). To summarize the information gathered from these two items, it can be concluded that Russian tourists, in general, mostly select 4-star hotels for their accommodation.

The results confirmed that the Russian guests would prefer travelling to Croatia by airplane, as a result of the large distance between the Russian Federation and Croatia. Nearly all of the participants in the study (94.6%) declared that they would use air travel as the form of transport to visit Croatia. Airline transport reduces the time needed to travel to Croatia to 2 h 50 min between the two capitals Zagreb and Moscow. From other Russian cities then journey would take a certain amount of time longer, because those flights include stops. The survey offered a possibility to choose either a regular flight or a charter flight. The division among these two answers was almost equal: 48.5% of the participants selected a charter flight and 46.1% preferred a regular flight as their primary choice. The rest of the answers belong to the car (3.6%) or train (1.8%).

Travel motives are one of the most significant topics with regard to this research. It is one of the essential questions which can provide the answer whether Croatia has a suitable basis to attract more Russian guests. The information obtained from the analysis of the survey implies that more than half of the respondents travel primarily for a "sun and sea" motive (52.4%). The main motive of the 20.5% of the participants is the historical and cultural heritage of the country. A similar number of people (19.3%) are mainly motivated by the beautiful nature. Moreover, sport and active vacation occupy third place as a principal motive, with 3.0% of the answers. Meanwhile, 1.2% of the participants chose gastronomy as the most important reason and another 0.6% selected the group including festivals, entertainment and nightlife, and finally, 3.0% of the answers belong to other motives. Wellness and health reasons have proven to be unpopular among Russians, since nobody marked this particular answer.

In addition to the topic in the previous paragraph, the questionnaire required from the participants to declare the main factor which would make them return to a certain tourist destination. The item was presented in the form of an open-ended question. From the answers provided from the respondents, it is clear that there are five principal reasons which would stimulate Russian guests to return to a certain country they have already visited. Pricing seems to play a decisive role in attracting the Russian guests to visit the same tourist destination again. However, the other four elements were also highly represented among the answers. The other elements which were singled out were an overall pleasant experience, quality of service, beautiful nature and visiting the places which the tourists were not able to visit during their first trip to the destination.

The survey included the topic of seasonality, because one of the goals was to determine in which part of the year Russian tourists travel most frequently. The intention was to verify

whether the results would overlap with the main tourist season in Croatia. The majority of the respondents (41.5%) tend to travel in the summer. Autumn occupies the second place with 24.5%. 13.3% of the participants marked spring as the season during which they prefer to travel. Winter as a primary option was chosen by 10.2%. Meanwhile, 10.5% of the participants declared that they either prefer to travel all-year around or whenever they can have their vacation approved. These results are contributing to the hypothesis that Croatia as a tourist destination has a potential to attract more Russian guests, as they are in line with the tourist seasonality in Croatia.

The questionnaire contained one item with regard to the duration of the stay to confirm the often mentioned characteristic of the Russian guests as one of the tourist groups who stay the longest in one place. They were answering the question how long would they stay if they were visiting Croatia. The analysis of the results demonstrated that 67.6% of participants in the study would stay in Croatia at least 10 days. The results confirm that the Russian guests tend to stay longer in one destination, which makes them a desirable tourist group. In detail, the majority of the Russian tourists (36.4%) would stay 10 days in Croatia, 19.7% would stay 14 days (two weeks), 14.0% chose to answer seven days (one week), and 11.8% answered eight or nine days. Finally, smaller percentages belong to 12 days (6.4%) and to the very short or very long stays: 6.6% for less than 7 days and 5.1% for more than 14 days.

The participants were asked to single out the most attractive tourist destinations and explain what makes these particular destinations attractive for them. Determining which are the most popular destinations (and reasons behind that choice) and comparing it to the Croatian tourist offer will contribute to the conclusion whether the country has the potential to attract more Russian guests. Considering that the item was an open-ended question and with regard to the information obtained from the participants, it was decided that the most attractive tourist destinations for the Russian tourists will be categorized and divided into three groups according to certain similarities. The first category consists of Spain and Italy. These two Mediterranean countries were chosen most often by the participants as their association to the most desirable tourist destination. The reasons they presented were almost equal for both countries. The most emphasized factor was the diversity of the tourist offer based on the combination of the sea and beaches, the Mediterranean climate, historical and cultural aspects and the beautiful scenery. The second category refers to Asian countries in general, with Thailand and Vietnam being most frequently mentioned. The explanations for that choice are related to the interesting cultural and historical heritage and an acceptable quality-price ratio. The third group includes Greece, Turkey, Tunisia and Egypt. The reason is similar to the ones given for the second category. The participants single out a wide offer of hotels and a good quality and service in comparison with the price. The results obtained from this survey are in line with the information gathered by the Croatian Tourist Board in 2013. The aim was to observe any possible changes in the past few years.

However, it seems that the three groups of the tourist destinations have a stable position in the top 10 most popular destination in the Russian market. Italy, Spain and Croatia share numerous characteristics as being countries with sea and beaches, a Mediterranean climate, cultural and historical heritage, and a similar lifestyle.

One of the most significant information to gather from the study was to understand the perspective of the Russian tourists about Croatia and its tourist offer. Therefore, the questionnaire included the question, do they (the participants) consider Croatia as a *Very attractive*, *Attractive*, *Not attractive* or *Not attractive at all* tourist destination. Moreover, respondents were asked to provide an explanation as to why they chose a certain answer. Among other items, this one is probably the most essential for confirming or rejecting the hypothesis of this research. The results demonstrated that 89.7% of respondents consider Croatia to be an attractive or very attractive tourist destination. 29.5% decided for very attractive, while 60.2% marked attractive. Meanwhile, 10.2% declared that Croatia is not an attractive destination, and only 0.1% chose not attractive at all. Then, the explanations for a particular option were observed. Those participants, who answered that Croatia is an attractive or very attractive tourist destination, were almost all emphasizing a single factor – the beautiful nature and coastline. That appears to be the leading element without any competition. The other reasons in favour of the high appeal of Croatia were its affordability and short flight time from Russia. A smaller number of participants did not provide a concrete reason for favouring Croatia as a destination, but explained that any interesting country they already have not visited is attractive for them. The 10.3% of the participants who perceive Croatia as not attractive or not attractive at all specified the high prices or the fact that they simply do not know enough about Croatia.

The percentage of the participants who visited Croatia at least once is 25% from the overall participant structure. Three items in the questionnaire were oriented only towards the participants with first-hand experience in Croatia. They were asked to explain their main motive, which stimulated them to travel to Croatia. Furthermore, they provided their opinion about the dissatisfying elements, as well as the ones which they considered to be the most positive about Croatian tourism. With regard to the travel motives, they can be divided into four most significant groups. The majority of the respondents emphasized the combination of the beautiful nature and cultural and historical heritage in Croatia. Others declared that they travelled to Croatia after their friends, who had already been to Croatia and had a pleasant experience, advised them to visit the country. Some of the participants indicated that their most important reason to visit Croatia was the well-known town of Dubrovnik, protected by UNESCO. One part of the participants explained that they visited Croatia when they primarily travelled to Montenegro. They reveal that they used the opportunity of being close to Croatia for a visit, in the times when they still did not need to have a visa to enter Croatia.

When it comes to their perspective about certain elements

of the Croatian tourism, several participants emphasized the positive experience. Some of them simply pointed out that they were satisfied with all aspects of their visit. The most accentuated individual factor is the beautiful nature, especially the Plitvice Lakes National Park. The participants often added the clean sea and peaceful small towns. They enjoyed the Mediterranean cuisine and were content with the approach of the local people. Only a small number of the participants singled out a specific negative experience. Most of them referred to the beaches, which they did not like, because they were rocky or the entrance to the sea was from a stone platform. That point of view is not completely unexpected, as it is known that Russian tourists generally prefer sandy beaches [3].

The results related to the visa regime demonstrate that for Croatia, requiring a travel visa is still a restrictive factor. Some 41% of the participants declared that the obligation of obtaining a visa certainly de-motivates them from travelling to Croatia, while 23.5% confirm that the elimination of the visa regime would most probably stimulate them to visit Croatia, and 21.7% answered that they would probably consider Croatia more as their tourist destination, if a visa was not required. Only 13.9% marked that the current visa regime is not a relevant factor for their choice.

IV. DISCUSSION

The source of information about the tourist destinations is highly relevant information for strategic planning in the tourism sector. If this information is known, the decision about the targeted place of providing the information on the destination to the public is facilitated. This topic is very useful in various types of tourism researches and strategy planning, whether the subject of the study are tourists in general or a specific targeted tourist group, like the Russian citizens in this one. It is expected that the government and private sector participants will invest most of their marketing resources and attention to the information channels which are most visited by the clients. When the *pool* of possible guests is bigger, the bigger will be, as a consequence, the number of tourists who actually decide to book travel to Croatia. It would be interesting to study this topic in more detail in the further researches, because there are some online websites whose popularity is rapidly growing and are starting to influence significantly the world of tourism, such as TripAdvisor, Booking.com, etc. These types of online travel agencies and websites, as a result of their appealing and efficient strategy, are gathering millions of tourists in one place. This is why more and more tourist service providers are making arrangements with these online companies. Being present there and having an either positive or negative review makes a substantial difference, because those websites provide an instant reach to millions of tourists. Considering that such a large number of Russian tourists search for information online, it could be helpful to put this information in relation with a concrete website to observe which ones have the strongest impact on the tourists.

For the same reasons around the topic of accessing the

information, it is useful to know where the Russian tourists mostly book their travels, and to put a special emphasis on that channel in the strategic plan. On the one hand, if the majority of them book their trips online, the strategic focus and objective should be the most popular online websites for booking travels. On the other hand, if the tourists prefer to use travel agencies as their booking partner, then the strategy should target contracts with influential travel agencies. This habit can vary among different target groups (age, nationality, travel motive criteria, etc.), and therefore, a general strategy might not apply to all of them. In that case, it is necessary to adjust the strategy according to the specific target groups.

It is difficult and sometimes inefficient to have a strategy for each and every group, but a general strategy should definitely be adapted for the major tourist categories. Also, the approach should be customized for the ones that are not playing a significant role in tourism of the country, but are for some reason of strategic importance for the branch. For example, Russian tourists are considered to be an "attractive" tourist group, because they stay longer in one place than others and tend to be at the top of the "best spenders" lists. On average, they spend more than 110.00 Euros per person per day on vacation [3]. If Croatia were able to attract just a few more percent of Russian tourists, it would be noticeable in the total revenues. However, currently the Russian tourists occupy a small share in the overall Croatian tourist structure. This is why it would not be advisable to completely change the tourism strategy, which is concentrated more on other tourist groups. Nevertheless, if there is potential to attract even a few more Russian tourists to Croatia, with just a slight addition or change to the strategy, it would be of benefit for the Croatian tourism sector to implement them. With regard to the sales channels, the results show that more than half (62%) of the participants in the study choose travel agencies as a channel they mostly use to make their travel reservations. If this result is compared to the previous question, it can be concluded that most Russian tourists get the relevant information online about the possible destinations to visit, but when it comes to booking a concrete arrangement, hotel, transfers, etc. they prefer to use the services of travel agencies. It is possible that they want to confirm the information sourced online with a more reliable source. Moreover, travel agencies offer a variety of travel insurances, verification that the hotels and services they offer are high-quality, etc.

The results indicate that the online channels and travel agencies are equally important, as they are often visited, just with different motives. It can be concluded that, if possible, it would be efficient to be present both online and in travel agencies through various contracts and agreements. The objective is to begin with highly influential companies. Even if they take high commission fees (which they tend to do, based on their domination in the field), they have the ability to provide many guests, which compensates this expense. Then, the smaller *players* can be considered. However, they cannot have the benefits as the big ones, because they bring a small share of guests and cannot compensate the perks given to them with a number of clients. They usually get a few percent in

commission fee.

The hotel sector is the key initiator of the investments in the tourism industry in Croatia, and special attention should be given to its development. Hotels participate with the largest share of 48% in the overall income from the tourist accommodation capacities, but they are represented with only 13% in the structure of the Croatian tourist accommodation offer [4]. In addition, they form a portion of the 32% in the total number of the tourist overnight stays. These numbers show the high potential of the hotel sector. Currently there are numerous investment projects in the hotel sector, but they are stagnating due to the immense barriers which exist for the entry and exit from the sector [5]. This study, although realized only among the Russian tourists, confirms the need to restructure the existing accommodation structure in Croatia. Hotels participate with almost the smallest share in the structure, when it should in fact be the opposite. The Croatian Ministry of Tourism should introduce a model which would be led by the hotels with the biggest share in the structure. It is advisable to set forth with those changes as soon as possible, being a long-term process. The first step would be to determine the desired growth rate of the hotel categories in the accommodation structure through time and try to execute that plan, to get at least a rate close to the established objectives.

Transport is another influential variable in the tourism industry, i.e. it enables the tourist flow between different countries and continents. The tourism strategy of each country should certainly contain transport as one of the crucial factors. If one of the strategic objectives is to attract a higher number of tourists, then one of the key steps in achieving the goal is to assure its availability. Only in a negligible percent of the cases does difficulty in reaching the destination represent an advantage. Transport infrastructure needs to provide a comfortable and fast trip from one destination to another, which includes a series of factors, such as long-short trip, price of travel and the additional offer along the way, which could induce a tourist to spend even more than planned [6]. The last element refers to various retail stores, coffee shops and restaurants which are located next to the highways, at the ferry ports or the airports. An additional offer has the ability to bring the trip closer to a comfortable and interesting experience, rather than being a necessary annoyance. In the Russian Federation, the biggest travel companies are mostly creating the leading global policy and sales strategy for a certain tourist destination. They represent, along with the major airline companies, the most influential factors which determine the tourist flow from Russia to other countries. The biggest travel companies in Russia are TEZ Tours, Pegas, Russian Express, Ascent Travel, Paks, TUI, Biblio Globus, Natali Tours, etc. They usually contract a lease on the charter flights to a certain destination [3]. Consequently, they control the tourist flow to that particular destination and have the power to decide how many seats in the charter flights they will then lease to the smaller and less influential travel companies. That model has an impact on Croatia, as it is one of the countries to which Russian tourists predominantly travel by plane.

Travel motives are one of the most significant topics with regard to this research. It is one of the essential questions which can provide the answer whether Croatia has a suitable basis to attract more Russian guests. For example, natural background, urban architecture, history, etc. are the elements of a certain country which cannot be changed. On the one hand, if a person's travel is motivated by the beautiful nature or sea, then that tourist can be easily attracted to Croatia. On the other hand, if a tourist travels, for example, out of fashion or architectural motives, then Croatia does not have the background on which to compete. It can be observed from the results that for more than 90% of the Russians participating in this study, the most significant motives for travelling are the sun and sea, the historical and cultural heritage and the beautiful nature. Considering that Croatia is basing its tourism industry on these three particular pillars, it can be concluded that the preferences of the Russian tourists and the Croatian tourist offer are definitely compatible. This fact is one of the elements supporting the hypothesis in this research, which assumes that Croatia has the potential to attract Russian guests and increase their share in the overall tourist structure.

The Croatian Ministry of Tourism as well as the private sector is making efforts to create an efficient strategic plan which would extend the tourist season in Croatia. The success is gradually being achieved, considering that the capital city of Zagreb was declared Best European Advent Destination in 2015 in a survey conducted by the popular tourist website European Best Destinations. However, it is much more difficult to attract the tourists seeking relaxation in the sun by the sea to visit Croatia outside the main summer months. If the results obtained in this study are compared with the statistics of the overnight stays of the Russian guests in Croatia in the past years, it becomes obvious that the summer season (June – September) is certainly the period when Russian tourists are highly interested in visiting Croatia. The results show that the interest in Croatia starts to grow in May, reaches its peak in July and August, and shows a considerable decrease in October.

The results obtained from this survey on the most popular tourist destinations among the Russian tourists are in line with the information obtained by the Croatian Tourist Board in 2013. The aim was to observe any changes in the past four years. However, it seems that the three groups of the tourist destinations have a stable position in the top 10 most popular destination in the Russian market. Italy, Spain and Croatia share numerous characteristics as being countries with sea and beaches, a Mediterranean climate, cultural and historical heritage, and a similar lifestyle. The next step for further studies would, accordingly, be to compare those three tourist destinations, with price and type of offer being the main criteria, to determine how Croatia can attract even a smaller number of the Russian tourists, who would usually visit Italy or Spain for their vacation. It would be interesting to compare the statistical data from the analysis and for 2016, to analyse if the general geopolitical and economic situation has affected the list of the most visited tourist destinations by Russian tourists. "Antalya, on Turkey's Mediterranean coast, was a

favourite spot for Russian tourists, with warm, sandy beaches of a kind that are hard to find in Russia. But after Turkey shot down a Russian warplane near the Turkey-Syria border in November, Russia banned tourists from travelling there [7]. Travel to Egypt was also banned, after terrorists blew up a Russian jetliner bringing tourists home from holidays on the Red Sea. The Islamic State has claimed responsibility in that case." [7].

When Croatia became an EU member in 2013, numerous EU laws and procedures needed to be adopted. One of them is the EU visa regime, which brought changes to the Croatian tourism industry. Certain tourist groups were no longer able to travel to Croatia visa-free. Instead, to have a vacation in Croatia they must now first go through the visa procedure, which is costly and time consuming. The regulations presented an obstacle, especially for certain tourist groups, such as the tourists from Russia, Ukraine and Turkey, whose overnight stay statistically showed constant growth in the years before [8]. In 2012, Croatia was visited by almost 200,000 Russian tourists, which placed them in 10th place in the overall tourist structure [9]. In order to reduce the negative effects for tourism, the Croatian government developed a visa system that would facilitate the issuing of visas for tourists from non-EU countries, especially from the Russian Federation. The procedure for Russian citizens was reduced to a maximum of five days from the date of application. In addition, visas are not issued only by the Croatian embassy in Russia, but also in selected certified travel and visa agencies. However, why would Russian tourists come to Croatia, which implies the visa procedure, when they can travel to a country with a similar tourist offer, but without the additional constraints? On the other hand, it was shown in the previous results analyses that Italy and Spain are the most desirable tourist destinations for Russian citizens. For both countries Russian tourists need to obtain a visa. This fact demonstrates that the visa does not have to be an excluding factor for a tourist destination.

The Croatian tourism registered constant growth in the overnight stays of Russian guests in the years before 2013, when Croatia became an EU member. The newly adopted EU visa regime turned out to be an obstacle, since the number of Russian tourists visiting Croatia started to decrease in 2013. However, the example of Spain and Italy shows that the visa regime does not have to be an excluding factor which would cross Croatia from the list of the desirable tourist destinations in the Russian market. Spain and Italy are both EU members with a visa obligation for Russian tourists, but are at the top of the most popular countries Russians would or have been visiting. Realistically speaking, the visa regime is one of the elements which cannot be eliminated. The political situation in the EU and in Croatia makes it impossible for Croatia to withdraw the visa necessity for Russian citizens. Nonetheless, the Croatian government can and already has been putting efforts towards facilitating the visa procedure for Russian and for Ukrainian and Turkish citizens. However, the visa obstacle can be compensated by an efficient strategic plan, which would focus on the factor which can be changed or adapted to the Russian market. The current geopolitical situation is a

fertile ground for introducing a specific strategy, because due to the geopolitical circumstances, Russian tourists are forced to substitute their habitual and most popular tourist destinations, such as Turkey, Egypt, etc., with new ones. Croatia has the potential to use that newly created gap in the Russian tourist market to its favour. With a well-thought out strategic plan Croatia, could influence the decrease, which occurred after 2013, and include the Russian tourist again in the Top 10 in the overall tourist structure.

The information presented in this study enables to determine the general profile of a Russian tourist. The analysis of the research results shows that there are numerous complementary variables between the preferences of the Russian tourists and the Croatian tourist offer. That means that substantial modifications are unnecessary, because what Croatia has to offer in tourism is suitable for the Russian market. Logically, the Croatian product just needs to be presented and promoted in a more efficient manner in the Russian market.

There are a few elements which are emphasized by the Russian tourists as their main motives when they choose the destination to visit. As the most significant reasons for visiting a certain tourist destination they accentuate the sun and the sea, the cultural and historical heritage and the natural beauties. Those elements are also the three pillars Croatia is building its tourist offer on and its principal advantages in tourism in general Croatia [10]. It can be concluded from the Top 5 destinations visited by Russian guests that they enjoy the Mediterranean climate and cuisine. Italy and Spain, which belong to the most popular tourist destinations in the Russian market, have a similar offer as Croatia based on the combination of the beautiful nature, interesting history and numerous cultural monuments, sunny climate during the summer, and many beaches. The only difference is that Italy and Spain have more sandy beaches than Croatia. On the other hand, Croatia is the closest with regard to the distance and short comfortable travelling.

The lack of sandy beaches is one of the weaknesses. Most of the complaints from the perspective of the Russian tourists are precisely related to the beach types. The visa regime was already discussed as being an obstacle which cannot be eliminated, but can be compensated. One of the mentioned opportunities refers to that element. Some improvements in the procedure already exist. However, an additional analysis should be carried out to determine whether there are still more options to facilitate the process, especially with regard to developments in technology and online applications. Another weakness is related to the accommodation structure in Croatia. It was presented that hotels bring the highest profits in the Croatian tourist industry, but which are represented by the smallest share. Russian tourists, as well as other tourist groups, prefer to use hotel accommodation when on vacation. The additional offer is included in the weaknesses category, but it depends on the particular tourist destination in Croatia. On the one hand, certain most distinguished Croatian tourist destinations, such as Dubrovnik, Split, Opatija, Rovinj, etc. have a wide range of additional offers, which includes

restaurants, numerous excursions, city tours, events during the summer, etc. On the other hand, the rest of the destinations usually provide only one type of tourism, one particular specialty. Therefore, the additional offer should be developed at the same level in most of the destinations.

The current geopolitical situation creates new opportunities for Croatia to retrieve those Russian tourists “lost” after 2013. Due to the war and political instabilities in individual popular tourist destinations in the Russian market, Russian tourists are forced to consider other destinations, which are less popular. This is why the accent is on the “right strategy at the right time”, when there is even less effort needed to attract Russian guests. The political situation can simultaneously present a threat, because there are increasing instabilities between Russia and the EU (and the USA), as well, and it is not clear how the situation will further develop. One of the most considerable threats is the better offer of the competition. Thailand, Tunisia, Greece, etc. have a high number of all-inclusive resorts with a wide additional offer and an attractive price-quality ratio. Croatia should not allow an expansion of its image as a costly destination.

Promotion refers to the efforts with regard to the presentation of Croatia in the Russian media, websites and among travel agencies. Russian tourists tend to search for the information online, but they still mostly book through traditional travel agencies. Consequently, none of the two channels should be neglected. The objective is to have a frequent presence of Croatia in the Russian market and to make the information about Croatia easy to obtain. An emphasis should be on a more intense collaboration between the Croatian and Russian travel agencies and tourism websites. In addition, it would be beneficial if more websites related to the Croatian tourism had a version in the Russian language. Some of the participants in the study declared that they do not have sufficient information about Croatia, so the information needs to be as available and easy to find as possible.

Considering that the results demonstrate that Russian tourists would predominantly use airplane transport to travel to Croatia, it would be advisable to try to arrange more charter flights between primarily Moscow (and other large Russian cities) and Croatian airports, especially the ones that are located at the coastline, like the Zadar, Dubrovnik, Split, Brač and the Rijeka Airport. Zagreb, as the capital, already has better connections throughout the year, and it can be seen from the analysis that the Russian tourists prefer their summer vacation on the coast.

It would be inefficient to place and promote in the Russian market a type of tourist packages which are not quite desirable. Therefore, the packages oriented toward the Russian market needs to be thoughtfully elaborated and designed according to the preferences of the Russian tourists. That implies mostly summer packages in the locations where beautiful nature and cultural and historical heritage are combined, with a wide range of hotel options and close to an airport, as well as being offered at an acceptable price. It would be useful to include the possibility of various excursions and events to create the image of a rich additional

offer. All-inclusive models are very attractive for Russians, as well as the other tourist groups, but they represent a disputable topic. On the one hand, they are stimulating high bookings of a certain hotel, but on the other hand, the all-inclusive model has a negative impact on the destination tourism, because the tourists who book an all-inclusive service tend to stay most of the time in the hotel, as they have all they need inside of the hotel. Consequently, they spend significantly less outside of the hotel, in the restaurants, on the beaches, etc. Additionally, the packages with a special focus on the sandy beaches should be advertised. Destinations which possess purely sandy beaches are not frequent in Croatia, but should be especially promoted to become well-known and to avoid the image of Croatia as a country with only rocky beaches.

Restructuring the type of accommodation offered in Croatian tourism will manifest general benefits for the tourism industry, and not only for attracting Russian guests. However, it is a long-term process which implies detailed planning of the investment according to the tourists' needs. One attractive hotel or resort can contribute to the awakening of those destinations which are less popular or have potential, but have been neglected from a tourism point of view. The long-term construction and reconstruction plan should be based on the analysis that will show which destinations do not have at least one representable hotel or in which destinations the demand for the hotels (analysed according to specific types of the hotels) is higher than the actual current capacities.

The visa regime for Russian citizens cannot be changed, but efforts should be put into figuring out more possible ways to facilitate the procedure for obtaining a Croatian tourist visa.

It is important to make Russian tourists feel welcome and pleasant in Croatia. One of the ideas of how to achieve this could be to determine a few popular “Russian destinations”, which could be promoted for the forthcoming season as a special offer. This kind of package/offer should include a variety of additional excursions and events, but Russian-friendly, i.e. with Russian speaking animators, etc.

V. CONCLUSION

The information presented in this research as well as the results obtained from the survey confirm the two given hypothesis.

Croatia as a tourist destination has the potential to attract more guests from the Russian Federation. The Croatian tourism sector could increase the financial benefits from the Russian market by intensifying the efforts in making Croatia appear more attractive to Russian tourists. The research has shown that Croatia as a tourist destination possesses various elements which are in line with the demand in the Russian market. Moreover, until the year 2013, the number of the arrivals of Russian tourists in Croatia was constantly increasing. That fact demonstrates that every year Croatia is becoming a more and more attractive tourist destination in the Russian market.

Croatia can increase the number of the Russian tourists and their share in the overall tourist structure by implementing certain concepts in its offer. Until 2013, the number of the

Russian tourists visiting Croatia, and consequently, the revenues generated from that precise group were growing. That positive flow was interrupted in 2013 when Croatia became a member of the EU. However, the guidelines from this research shows that there is a possibility to compensate that negative new characteristic with additional promotions and strategic adaptations in the tourism plan, without making substantial changes in the overall Croatian tourism strategy [10].

Additionally, the geopolitical flows make now, the perfect time to act in the Russian market with an upgraded and refreshed strategic plan. The first and most significant objective is to bring Russian tourists back into the Top 10 in the overall Croatian tourist structure. This study provides certain ideas and suggestions that can serve as a foundation for a more detailed reflection and analysis, in order to create a real strategic plan to be implemented.

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