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THE FEATURES OF THE NATURIST CAMPING MARKET

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Abstract: This report examines the characteristics, the current situation and the perspectives of the European naturist camping market with the aim of defining future strategies and tactics for further development in this field.

The first part engages with the definition of naturism, its historical evolution and the system of European demand for naturism by looking at the main European naturist associations, clubs and largest specialised tour operators and tour agencies.

Additionally, this thesis examines the direction of the naturist offer over the past 10 years in Europe and Croatia. By means of a comparative analysis of the characteristics of the Croatian demand for camping and Croatian demand for naturist camping, trends, similarities and differences between the two were established.

On the basis of this research, the CARE method was used, which provides guidance on how to Create, Amplify, Reduce and Eliminate certain aspects of the supply of naturism in order to define future strategies and tactics for achieving competitiveness on the naturist market.

Key words: naturism, naturist demand, naturist camping market, management.

INTRODUCTION

This report aims to revisit the definition and the evolution of naturism. It looks at the characteristics of the market for naturism on the demand side. It provides an overview of international and key national naturist organisations, as well as an overview of naturist tour agents and tour operators specialised in naturism. 15,64% of all camping capacity in Croatia is designed for naturism, hence the analysis of the main characteristics of Croatian naturist offer.

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In this work, we deliver a comparative analysis of the characteristics of the Croatian demand for camping and the demand for naturist camping, which ought to enlighten the similarities and differences of features of the demands as well as help identify suggestions for the improvement of the sector and the creation of added value in naturist camping sites. The results of the research are delivered in the form of a series of conclusions about the features of the naturist market in Europe and about the prospective of further growth of this segment of the Croatian tourist offer.

1. RESEARCH METHODOLOGY

The basis for this work are the results of a research of the European and Croatian naturist markets, carried on in summer 2008. The first part of the research was a one-off round of telephone interviews with a carefully chosen sample of the 5 most important European naturist federations and 6 main tour operators or specialised naturist agents. The target group was chosen from the wider population recorded in the INF-FNI (www.inf-fni.org/pages.php?id,2/05.08.2009/) (International Naturist Federation) database and the criteria used for definition the sample of the naturist federations was the number of their members and for tour operators, it was their size among the national network of tour operators in a range of European countries. The second part of the research is the analysis of the supply of naturism in Europe on the basis of secondary data about the fluctuations of the naturist camping capacity in Croatia. A single research was conducted in the form of a comparative analysis of the naturist camping capacity published in the ADAC guide in the years 2000 and 2009. The method used was telephone interview with the aim of checking the capacity in the naturist camps of a diversified nature, for both naturist and „textile” guests.

In order to identify the defining features of a typical naturist guest in relation to an average camping guest, 2 published researches were used. Firstly, the TOMAS research carried out by the Croatian Institute for Tourism and the Croatian Camping Association in 2007 and secondly, a research conducted among the naturists in a large naturist resort in Istria. The characteristics of the demand for camping with the features of the demand for naturist camping were compared with the purpose of establishing similarities and differences among them, as well as identifying suggestions for the improvement of the sector and the creation of added value in naturist camping sites.

2. CAMPS – CHARACTERISTICS OF THE NATURIST DEMAND

The rising trend for travelling caused the demand for camping facilities to rise proportionally. They were considered to be places for a spiritual recovering and change, as a result of a prolonged stay in the nature. Camping sites became available to a wider range of people as uncomplicated and cheaper types of accommodation, as well as places of mass tourism. During the 1980s, there is a rising demand from campers for a wider scope of facilities in camps, especially higher quality, opportunities for social interaction and a search for the feeling of a changed lifestyle.

Subsequently, in the 1990s, the market underwent a significant diversification. As the main motives for camping, clients now identify nature, experience and freedom. The demand for comfort, luxury, facilities, arranged outdoor environment and the quality of equipment. The technology of travel is being modernised with the invention of new forms of travelling, which enable increased mobility of guests.

Modern campers have several motives for travelling (Birin, 2009, 32):

- The freedom of choice – campers have the choice to create their own itinerary, to decide about the timing of movement, the stops, the camp sites which to use and the length of the stay.
- The experience – every journey into the unknown is a new adventure and a new experience for a camper. Similarly, being around other campers with similar experiences means spiritual richness for him/her.
- The change – camping allows a lifestyle completely far different from that of a daily routine. It brings relaxation, leisure and a move away from the time spent under strict time schedules.
- The nature – to live in and with the nature, to share sounds and absorb feelings, to see the starry sky, to feel the smell of the dew and to enjoy the wind has become a kind of luxury in the world of today which is difficult to find in urban centres.
- Simplicity – in relation to other forms of accommodation, camping ensures simplicity. Relaxation allows for a less conventional dress code, behaviour, addressing mode and an easy access to communication, friendship and relationships
- Sociability – camping makes communication easier, encourages association and sociability.
- Spirituality – time spent in the nature and meditation.

Modern camp sites tend to orient towards a high level of environmental, infrastructural and quality values. The differentiation and the specialisation of camp sites target certain market segments and create diversification of the naturist camping offer.

3. DEFINITION AND CHARACTERISTICS OF NATURISM

The naturist market came to being in the second half of 20th century. Naturism is referred to as a branch of tourism, which evolved from the need and desire for a special kind of rest and recreation. There is no single understanding about this type of tourism. Some see it as an ideological movement, whilst others see it as a commercialisation of a particular idea.

Naturism can be defined as: self-respect, respect for other beings of any nature, respect for those people who we do not share our opinion with, acceptance of differences and confrontation with others without the tendency to indoctrinate them, independence of political and religious thought, lack of discrimination on the basis of

race, nationality, gender or age; rejection of pornography, paedophilia or any deviating behaviour that could degrade naturism by associating nudity with a naked sex object (Sladoljev, 2001). The most broadly accepted definition of naturism today is as follows: Naturism is a new life style, which celebrates the culture of the free body, free soul and social interaction. Naturism is a lifestyle in harmony with nature, expressed through social nudity and characterised by self-respect of people with different opinions and of the environment (MINTeL 2005,5) .

Naturists believe that social nudity has multiple benefits (MINTeL 2005,5), as:

- Allowing the skin to benefit from exposure to the sun, air and water
- Rendering everyone equal regardless of age, gender, race or class
- Learning self-respect (this emerges from the self-acceptance needed to shed your clothes in front of other people) and
- Teaching respect for others (through the trust required to allow them to see your naked body and through the acceptance of their nudity)

It can be concluded that naturism is a kind of ideology, whereas nudism is the practice of the nude lifestyle outdoors in the nature and elsewhere. Nudism is often depicted as an antidote for demystifying sex itself and assigning healthy, vital and real dimensions to it (Dressen 1995, 7).

International Naturist Federation defines naturism as a return to the basic values. Without any clothes, people rely on their personalities and tend not to judge others on the basis of their clothes. Stripping off clothes is a way of stripping off the everyday stress (PROMO-CAMP 1983, 17).

Naturism is a global movement with a long standing tradition and a large number of followers. As such, it presents a significant potential for tourism, especially in Croatia, which as a country, holds the honourable position of the initiator of organised naturist tourism in Europe.

4. DETERMINANTS OF THE NATURIST DEMAND AND THE KEY ELEMENTS FOR SUCCESS IN THE NATURIST MARKET

The umbrella organization of world naturists is the “International Naturist Federation” (INF-FNI) with its headquarters in Bonn, Germany. The membership comprises of ordinary members such as national naturist organizations and extraordinary members made up of individuals from those countries which are not represented by national federations.

In the table 1, an overview of the largest generating naturist federations is provided, alongside their views on naturism, as collected via the interview method. The development of the naturist market is reflected in the fluctuations of the INF-FNI membership numbers.

Table 1: The development of the INF-FNI membership 1998-2007

Naturist federation	Country	1998	1999	2002	2003	2004	2005	2006	2007
ÖNV	Austria	2.940	2.640	2.740	2.700	2.568	1.700	1.700	1.700
FBN	Belgium	13.027	12.727	13.193	12.724	12.380	11.718	11.072	10821
UNS-SNU	Switzerland	8.560	8.453	8.087	8.087	7.671	6.696	7.000	6.500
UNA CR	Czech r.	632	538	600	327	241	178	300	132
DFK	Germany	45.972	45.276	42.686	41.724	40.937	39.963	38.816	38.025
DNU	Denmark	1.020	1.000	1.012	1.040	1.040	964	1.000	900
FEN	Spain	1.355	1.405	2.400	2.500	2.382	2.715	2.658	2.663
FFN	France	76.466	76.067	77.015	55.683	40.754	20.367	19.827	19.000
DNH	Croatia	250	270	250	100	150	100	80	100
FENAIT	Italy	4.906	5.000	4.910	5.000	5.000	4.500	5.000	5.000
INA	Ireland	207	230	212	245	240	230	200	225
CCBN	G. Britain	19.427	19.598	18.631	18.070	16.611	16.700	16.000	16.000
NNF	Norway	1.977	2.112	2.227	2.200	2.200	2.000	2.200	2.050
NFN	Netherlands	60.500	60.750	59.000	68.000	66.820	69.590	68.884	70.000
FLN	Luxembourg	366	368	440	470	500	460	454	420
FPN	Portugal	80	80	200	260	310	280	260	200
FNF	Finland	400	400	400	300	280	300	300	330
ZDNS	Slovenia	537	462	302	310	310	210	242	350
SNF	Sweden	2.993	2.932	2.998	3.300	3.119	3.003	3.100	3.020
	Total	227.883	240.308	237.303	223.040	203.513	181.674	178.093	178.636

Source: INF-FNI statistics 2008.

In the given period (1998-2007), there was a significant fall of 25.66% in the membership numbers of national naturist associations, mainly as a result of the fall in the membership numbers of the French naturist association, whilst the membership of other federations remained stable. Other federations show a relatively stable membership with slower rates of decline. Naturism in northern Europe declines, while it increases in South Europe.

International and national naturist associations

The following is an overview of those generating naturist federations of highest significance to Croatia. The data were collected in phone interviews and the result was the identification of trends, threats and possibilities for the development of the naturist demand.

Figure 1: Comparative study of different European national naturist federations

Federation	Foundation year	Number of associations	Membership	Factors of success	Threats
French federation of naturists (Federation Francaise de Naturisme FFN)	1950	160 and 85 summer resort	19000	Climate, efficient service, price, quality, segmentation of guests according to age and interests	Textilisation
Naturist Federation of Netherlands (Naturisten Federatie Nederland NFN)	1986	80 clubs and 60 locations for recreation	70000	Climate, nature, beaches, better service and programme, entertainment, high quality accommodation	Sexual tourism, discrimination on the basis of sex
Central Council for British Naturism	1964	130 clubs and private societies	16000	Nature, sea, family orientation, social events, safety	Sexuality, danger for children
Slovenian association of naturists (Zveza drustev naturistov Slovenije)	1977	5	1000	Climate, beaches, nature, comfortable accommodation, safety, new forms of accommodation like bungalows and hotels	Bad accommodation, unfriendly atmosphere, textilisation
Swedish association of naturists (Sveriges Naturistfoerbund).	1936	20 clubs	2950	Climate, nature, beaches, naturist rules, high quality of accommodation and environment	Gender and racial discrimination, unsafe environment for children
Danish federation of naturists (Dansk Naturist Union - DNU)		8	1000		
Norwegian federation of naturists (Norsk Naturistforbund)	1963	9			
Finnish federation of naturists (Suomen Naturistiliitto Ry)	1999		350		

Source: Author's research

Key differentiated naturist agencies and tour operators

Provided below is an overview of naturist agencies and tour operators, as well as a summary of the research on opinions, views, chances, challenges and perspectives for naturism. The views were collected in interviews with key representatives of agencies and tour operators.

Figure 2: Tour operators and naturist tour agents' key features

TOUR OPERATORS	KEY FEATURES
Nudist Cruises in Croatia – Netherlands	Main target group: mainly of younger age and couples who book online Main success factors: climate, quality of service, competitive prices, simple way of booking
Inteernatuur - Netherlands	Main target group: couples over 50 seeking increasingly luxurious accommodation and younger couples and families seeking the standard camping accommodation Key success factors: availability of information, nice climate, "near nature feeling" competitive prices Threats: combining of textile and naturism in the same resort
Bosmere Travel – UK	Main target group: couples with no children and people recently retired Key success factors: climate, quality, competitive prices, information, the feeling of open nature and entertainment Potential lies in nautical tourism and eco-friendly resorts which could attract young people. Homosexual tourism also shows a great potential, under the condition of socially accepted behaviour Threats: aging clientele and lack of investment
Naturist Travel – Italy	Main target group: younger couples with no children, families with children Key success factors: entertainment, competitive prices, availability of information about the destination, accessibility of the destination, quality of service and attractive climate Threats: sexual tourism
Vidy reiser – Norway	Main target group: older, recently retired couples and increasingly younger generations. The first group is seeking peace, safety and a safe environment, whereas the latter demands more entertainment Key success factors: climate, quality of service, entertainment, availability of information Threat: Prejudices and of sexual tourism
Oboena – Germany	Key success factors: quality of service and competitive prices, easy way of booking and availability of information Threats: lack of quality and unrealistic prices
Specialised French tour agents	"I-Tour, 3 Rue Meyerbeer, F-75009 France"; "Soleil et naturisme, 20 Avenue de Nice, F-06800 Cagnes-sur-Mer"
Further British naturist tour agents:	"Peng travel"; "Bosmere travel"

Source: Author's research

The above leads us to conclude that Europe hosts a system of naturist clubs and organizations, as well as a system of naturism as a whole. National federations of naturists provide a structure to this system, which is further crowned by the international organisation of FICC (Federation Internationale de Camps et de Caravanning).

Additionally, Europe has a system of specialized tour operators and tourist agents, offering services of specially tailored travels for naturists.

From the research, several suggestions can be drawn for further improvement of the sector.

5. NATURIST OFFER

According to the information from THR Barcelona and the WTO (THR, 2008, 11), the growth of the European naturist market between 1995 and 2005 witnessed a total of 3 new naturist centres. Simultaneously, the developments in France as the largest receptor of naturists were as follows: 33 naturist camping sites were either shut or turned into textile camping sites, whereas a total of 37 new naturist camping sites opened or turned from textile to naturist camps.

Table 2: An estimate of naturist accommodation units 1995-2005

COUNTRY	1995	2005	DIFFERENCE
Austria	22	21	-1
Belgium	10	10	0
Switzerland	12	8	-5
Czech Rep.	2	4	2
Germany	136	139	3
Denmark	6	6	0
Spain	12	15	3
Finland	1	0	-1
France	164	170	6
Scotland	0	2	2
England	68	58	-10
Greece	4	1	-3
Croatia	15	17	2
Hungary	9	5	-4
Italy	7	7	0
Luxembourg	2	4	2
Netherlands	52	57	5
Norway	2	3	1
Portugal	1	3	4
Sweden	12	10	-2
Slovenia	2	2	0
TOTAL	539	542	3

Source: THR; Naturism market in Europe 2007, THR Barcelona 2008.

As evident from the above table, the growth of the naturist offer market is marginally positive. There is however no statistically relevant information about the capacities in individual countries or the number of overnights in naturist centres from year to year, from which it would be possible to draw more accurate conclusions about the trends in the development of the naturist offer. In summary, the naturist offer in Europe is stable and it has not undergone significant declines in the chosen period of time. Nevertheless, it is important to note that there was also no significant positive trend identified.

Naturist camping sites in Croatia

According to the data from the National Institute for Statistics in 2008, the capacity of Croatian camps was 224.438 people or the corresponding (3 people per accommodation unit) 74.813 accommodation units. The aggregate capacity measured in the total number of accommodation units in naturist camps equalled 15.471 or 22,11% in year 2000 and 11.703 or 15,64% of overall accommodation units in year 2009. Over the past 9 years, naturist accommodation capacity fell by 3.768 accommodation units which equal 24 %. (Tourism in 2001, 2002; Camping Association of Croatia for 2009).

Provided below is a comparative overview of the accommodation capacity in naturist camping sites in Croatia for the years 2000 and 2009.

Table 3: An overview of accommodation capacity in naturist camps in 2000 and 2009 (measure: camping units)

Camping sites	2000	2009	Index
KANEGRA, Umag	422	426	101
SOLARIS, Porec	1584	1747	110
ULIKA, Porec	1170	1063	91
ISTRA, Porec	841	1000	119
KOVERSADA, Vrsar	3370	2035	60
VALALTA, Rovinj	1980	2313	117
MONSENA, Rovinj	1367	0	0
POLARI, Rovinj	840	175	21
VESTAR, Rovinj	20	20	100
KAZELA, Medulin	1150	626	54
KOVACINE 25%, Cres	188	265	141
BALDARIN 70%, Cres	339	301	89
POLITIN, Krk	300	270	90
KONOBÉ, Punat	720	512	71
BUNCULUKA, Baska	480	400	83
STRASKO, Novalja	300	100	33
NUDIST, Hvar	150	150	100
SOVINJE, Pasman	200	200	100
MLASKA, Hvar	50	100	200
TOTAL	15.471	11.703	76

Source: Author's research and ADAC (2000), "Camping Caravanning Führer 2000", ("Camping Caravanning Guide 2000"), ADAC Publisher Munich, pp. 1029-1066 and ADAC (2009): "Camping Caravanning Führer 2009", ("Camping Caravanning Guide 2009"), ADAC Publisher Munich, pp. 989-1046.

Croatia witnessed one naturist camping site close down and a decline in the camping unit capacity for naturists in some camping sites. Mostly it was those which offered accommodation facilities to both naturists and campers with the consequence of the number camping units reserved for naturists steadily decreasing. In other camping sites, the difference in camping capacity appeared as a result of categorization or the raising of quality and diversification of camping facilities.

Table 4: A comparison between the overnights in camping sites overall and overnights in naturist camps

	OVERNIGHTS				
	2004	2005	2006	2007	2008
Camping sites	13.062.605	13.095.657	12.634.032	13.017.215	13.349.431
Naturist camping sites	2.096.291	2.146.639	2.081.551	2.026.449	2.024.356
Fraction in %	16,04	16,39	16,47	15,56	15,16

Source: Author's analysis, Reports from DZS RH (2004-2008), Tourism – cumulative data; 4.4.2/11.

Table 5: Arrivals of tourists to camps and naturist camps in Croatia

	ARRIVALS				
	2004	2005	2006	2007	2008
Camping sites	1.934.685	1.933.989	1.856.218	1.948.703	1.941.679
Naturist camping sites	209.240	213.198	206.521	205.608	202.761
Fraction in %	10,81	11,02	11,12	10,55	10,44

Source: Author's analysis, Reports from DZS RH (2004-2008), Tourism – cumulative data; 4.4.2/11.

From the data above it is evident, that although the number of nights in Croatian camping sites rose for 2,19 % between 2004 and 2008, the number of overnights in naturist camps fell by 3,5 % and the number of arrivals fell by 3,1 %.

Table 6: Overnights and arrivals to camping sites and naturist camping sites in 2008.

	Overnights 2008	Ratio	Arrivals 2008	Ratio
Croatia	57.103.494	100,00%	11.260.087	100,00%
Camping sites	13.349.431	23,37 %	1.941.679	17,24 %
Naturist camping sites	2.024.356	3,55%	202.761	1,80 %

Source: Author's analysis, Reports from DZS RH (2004-2008), Tourism – cumulative data; 4.4.2/11.

In 2008, 23,37% of overnights in Croatia took place in camping facilities, out of which 3,55% happened in naturist camping facilities.

A closer look at the comparative developments in camping and naturist camping overnights in the period 2005-2008 allows us to identify the following discrepancies outlined in table 7.

Table 7: Comparative overnights in camping sites and naturist camping sites in 2005 and 2008

	Overnights 2005	Overnights 2008	Index
Camping sites	13.095.657	13.349.431	101,93
Naturist camping sites	2.146.639	2.024.356	94,30
Ratio	16,39 %	15,16 %	

Source: Author's research, Reports from DZS RH (2004-2008), Tourism – cumulative data; 4.4.2/11.

The data above shows that the accommodation facilities in naturist camps have undergone a decline over the past 10 years so that the capacity of naturist centres went down from 22, 11% to 15,64% of overall tourist accommodation capacity in Croatian camping sites. Equally, the overnights in naturist camping sites between 2004 and 2008 show a decline of 3,5% in comparison to a rise in overnights in overall Croatian camping facilities of 2,19% in the time period between 2005 and 2008.

In conclusion, there is evidence to show stagnation and no significant growth of the Croatian naturist offer. However, there is a relevant amount of tourist demand comprising 15,16% of overall camping overnights in Croatia.

6. COMPARATIVE ANALYSIS OF THE CHARACTERISTICS OF THE CROATIAN DEMAND FOR CAMPING AND THE DEMAND FOR NATURIST CAMPING

With the purpose of examining the features of the naturist demand and the identification of the motives and behaviour of naturists in relation to standard campers, the aim is to show the similarities and differences between the tourists in naturist camps and those campers in the classical sense. The results of the following researches have served as the basis for this examination:

a) TOMAS summer 2007 (TOMAS summer ,2008): The research of the Institute for Tourism Zagreb and the Croatian Camping Association was conducted on a sample of 1298 families in all coastal regions of Croatia. The method used was identical to the standard methods that TOMAS uses for specialised researches. The focus was on the characteristics of campers in Croatia and the result was a report published by the Croatian Camping Association and the Institute for Tourism Zagreb. Both researches were conducted in the form of oral interviews based on a predetermined set of survey questions.

b) HENDEL, 2008 (HENDEL,2008): a research carried out in August 2008. in a large naturist camping village in Istria. The focus was to determine the features of the tourist demand in naturist camping sites. The sample comprised of 421 guests which took part in oral interviews. The targeted population from which the sample was drawn were three groups, the guests in the camping site, the apartment guests and the guests using hotel accommodation.

The nationality of guests in the sample reflected the nationality ratios of guests in the same resort in 2007. The survey questions were 15 minutes long and highly structured. The survey was prepared in the following languages: Croatian, English, Italian and German.

The results of the two researches allow us to do a comparative analysis, which shows differences and similarities between campers and naturists in Croatia. From this comparison it is apparent that in the naturist camping sites the average age of clients is higher than the average in Croatian camping sites, as well as in Croatia in general. The share of clients who took part in the questionnaire with finished higher secondary education or university degree is significantly higher in naturist camping sites as a contrast to classical campers in Croatia where majority has a secondary school qualification only.

In general, Croatian tourists as well as Croatian campers use media as a primary resource for collecting information about holiday options, which is followed by friends' recommendation, internet and experience of previous holidays. Naturists, as a contrast to average campers, trust their friends and previous experiences more. Organised stay through the agencies is more often chosen by naturists than other campers in Croatian camping sites, especially naturists that choose an accommodation in an apartment and rooms within a camping site.

Naturists in camping sites mostly stay for longer than three weeks, i.e. longer than other campers in Croatian camping sites which is possible to explain by large numbers of long term guests in naturist camping sites. Passive holiday and relaxation are the main motivation for guests' holiday in Croatian camping sites. On the other hand, guests in naturist camping sites see beauty of the nature as the main reason for coming. A research has shown that naturists see health, freedom and love towards the nature as the main reasons for partaking in naturism. They also point out that they want to continue taking part in naturism as guests of naturist camping sites.

On the basis of already mentioned, significant differences in demand of naturists and the guests in Croatian (textile) camping sites could be noticed, which tells a lot about the big challenges for management of naturist camping sites in the sense of specific adjustment for specific demand of naturists.

7. SUGGESTIONS FOR THE IMPROVEMENT OF THE SECTOR AND THE CREATION OF ADDED VALUE IN NATURIST CAMPING SITES

Key determinants of camping tourism growth, which also apply to naturist camps in Croatia, are the following:

- To enrich the camping offer and the tourist offer of the destinations where camps are located with added facilities and services (gastronomic offer as

well as different activities and programmes during the stay, the supply side on the international camping market may serve as a model)

- To focus on the quality of the camping offer in Croatia (harmonisation with the European standards, increase the number of camp sites of higher standards)
- To adjust the equipment and the pitching of camp sites to a larger number of motor homes and mobile homes, as well as to offer renting of already set up tents
- To carry out a diversification of the camping offer to make it more competitive on the market (for instance, eco-camps, strictly controlled naturist camps or camps specifically for motorists)
- To ensure high ecologic standards and make use of adequate ecological solutions in the management of camping sites, as well as to devote a lot of attention to the maintenance of hygiene
- To create the conditions for a larger number of „Blue flags“ on beaches or in the vicinity of camping sites
- To increase the usage of camping ground
- To make use of local and international organisations to pursue the goal of improving camping tourism in the country (for instance to carry out quality tests, comparisons with the competition in the market, to regulate prices, promote in the media and on the internet)
- To intensify promotional activity and the reputation of the Croatian camping product on the Internet
- To acknowledge the contribution of camping to the extent that the camping realistically deserves to change the negative prejudice in the eyes of the public by showing the transformation in quality, which has already been identified on the international market
- To welcome camping tourism as an important segment which complements and enriches the entire tourist offer of a country which genuinely attracts attention on the generating side of the market. (Hendija 2006, 86)

The findings of the analysis among the carriers of the demand for naturism point towards the fact that naturism is changing. Naturist sector does not show a tendency to grow significantly in Europe nor in Croatia. The membership numbers of national federations are falling, which on the other hand, does not scientifically prove that the overall numbers of naturists is decreasing. The overall number of naturist centres is slowly decreasing, but showing stable figures in the past 10 years. In conclusion, the market could be said to be stagnating, but it is still significant.

Of crucial importance for the sector are the following factors:

- New demand: younger families with small children, aging couples and same-sex couples

- New requirements: the need for safety and absolute protection, above all of children; the demand for privacy and elimination of all forms of discrimination (race, religion, sexual orientation); the need to dilute some old and strict naturist rules, an emphasis on the increasingly important social aspects of naturism, such as tolerance, respect, sensibility for friendship and interaction; recognition of the positive influence of naturism on children, the need for a mental and physical „good feeling“, and the reinstatement of the fact that naturism is unrelated to sexuality.
- New possibilities: Naturism is being discovered by those who do not necessarily consider themselves naturists, but nevertheless choose naturist resorts. An increasing number of guests dislikes to identify as members of a strictly defined group of naturists, but they nevertheless opt for that „dress code“ in certain situations. Naturism is turning into a „life style“. The method, referred to as CARE, can inform the supply side of naturism. This method helps group the main suggestions for marketing management of naturism.

Figure 3: CARE method of recommendation for management of naturist offer

C- CREATE	A-AMPLIFY	R- REDUCE	E- ELIMINATE
Experience	Quality of service	Hippy image	Naturism = sex
The spiritual side: joga, pilates	family image	image of a tourism for the aging population	rugged non-attended natural environment and replace with more advanced horticulturally attended environment
Safe environment guaranteeing privacy	appeal to the youth	too traditional activities	Gender-, race-, sexual orientation-based discrimination
New sports activities	activities for children		Unacceptable social behaviour (e.g. pornography, paedophilia, etc)
Environment full of tolerance	healthy environment (eco-tourism)		
	“body care” – spa, massage, aesthetics		

Source: adapted and adjusted according to THR: “Naturism Market in Europe 2007”, Barcelona 2008.

The suggestions for rejuvenation, creation of new values and redesign of the naturist offer ought to ensure the growth of the demand for naturist centres. Ideally, centres of naturist tourism ought to accept the more modern ways of meeting the naturists’ demand and create new values by means of new methods of marketing and management.

CONCLUSION

The market for naturism is a significant and specific segment of the tourist demand and supply. The system of demand has a wide reaching network of federations, clubs as well as an organised distribution through the network of specialised agents. The European naturist market hasn't been showing signs of a growth over the last 10 years, but it has a tendency towards stagnation. The Croatian naturist offer, on the other hand, is showing signs of a decline and unlike the European market, it is stagnating more significantly. The naturist demand is specific and changing in the same way as its needs and desires change. The experts in this economic branch consider the sea and the beaches as significant pull-factors; however the destination, facilities, cultural happenings and experience are becoming equally important. The results of the research show attempt to show that there is the need for a reorientation of the naturist offer towards new programmes: wellbeing, health, ecological environment and attractions. New naturist demand ought to be fostered among families with small children, newly retired couples and same sex couples without any discrimination and with maximal safety and mutual respect.

The conducted research for the needs of this thesis shows that the characteristics of naturists are different from those of classical Croatian campers. Whilst creating the naturist offer and building competitiveness it is crucial to take these differences into account.

The conducted researches allow us to draw suggestions with the objective of creating a high quality and competitive tourist product of naturist camping sites. The creators of the naturist offer will need to reconstruct the naturist experience. It will involve new activities, guarantee privacy among guests, reduce the image of naturism as a tourism for the „old age“, eliminate any connection between naturism and sex, enhance the feeling a „good lifestyle“ in a controlled environment, the feeling of individuality, safety and guaranteed privacy. Finally, this thesis aims to deliver suggestions for Croatian naturist centres to avoid textilisation, highlight the good image of naturism as a specific culture and lifestyle and increase the quality and the content of this specific sector of the tourist offer.

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