

**Expert opinion on the second part of the project No. 011603**

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**„Regionalisation in Tourism under the Aspects of  
Globalisation“  
[ *Turistička regionalizacija u globalnim procesima* ]  
elaborated by  
the Faculty of Tourism and Hospitality Management Opatija  
on behalf of  
the Ministry of Science, Education and Sports**

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The Kvarner as a tourism destination faces not only growing global competition, but has also strong competitors in its own country (Istria, Dalmatia). The Kvarner's major strengths in this competition are a favourable location in relation to major markets, good accessibility, an extraordinary attractive landscape, rich tourism traditions having left a good tourism infrastructure, a population acquainted with tourism and skilled in languages and, last but not least, a Faculty of Tourism and Hospitality Management training not only skilled managers and personnel for the regional (and national) tourism economy, but also functioning as a brain trust for tourism development in the region, well-embedded into the local population as well as into the management and political scene. This is again demonstrated by this study forming the second part of a larger scientific project on Regionalisation in Tourism under the Aspects of Globalisation and of a master plan for tourism development in the County of Primorje-Gorski Kotar [Primorsko-

goranska županja]. It has been elaborated by a team of 13 noted researchers, well-supported by students, on behalf of the Croatian Ministry of Sciences, Education and Sports.

Supplementary to the first part completed in 2003, the second part of the study focuses on the quality of the offer, on trends in achieving higher quality standards and on characteristics indicating a balanced and sustainable development also in the ecological sense. It establishes a comprehensive data file, which is to serve as a knowledge base for tourism destination management, i.e. for the elaboration of development strategies, at the regional, sub-regional as well as at the local (destination) level in the sense of an Integrated Quality Management (IQM).

The method applied is an inquiry among three major groups of participants in tourism, i.e. tourists, local residents and managers in tourism. Room renters, which had been an additional target group in the first project phase, were omitted this time. The research was conducted during the summers (15<sup>th</sup> May – 15<sup>th</sup> September) of 2005 and 2006 and included 1828 respondents among tourists, 1064 among residents and 167 among tourism managers, considerably more than in the first phase (813, 750, 86, respectively). Also a much larger number of destinations were included into the survey: 22 compared to 10 in the first phase. The 22 destinations are to represent sub-regions of the County of Primorje-Gorski Kotar. For the Riviera of Crikvenica-Vinodol [Crikvenička-Vinodolska rivijera] stand Crikvenica, Jadranovo, Novi Vinodolski and Selce; the Riviera of Opatija [Opatijska rivijera] is represented by Ičići, Lovran, Medveja, Mošćenička Draga and Opatija; the island of Krk by Baška, Krk, Malinska, Omišalj and Punat; the islands of Cres and Lošinj are represented, but not by specific destinations; the island of Rab is represented by the town of Rab and by Lopar; the Gorski kotar is represented, but not by specific destinations; for Rijeka and its surroundings stand Rijeka itself as well as Kraljevica and Kostrena. This selection is certainly representative for the tourism scene of the sub-regions as well as of the County in total. It remains, however, unclear, why most of the sub-regions are represented by specific destinations, while the islands of Cres and Lošinj and also the Gorski kotar are just taken as one destination.

Stratification of tourist respondents corresponds to tourist arrivals by destination and the typical share of accommodation categories and countries of origin in 2004 according to data provided by the State Statistical Agency [Državni zavod za statistiku]. Stratification of resident respondents corresponds to the number of residents as of 2004, again provided by the State Statistical Agency. It was aimed at inquiring at least 1.5% of the individual destination's population. For Rijeka as a large city just a share of 0.5% was achievable. Contrary to the former two target groups the principles of selecting the 167 tourism managers are not explained in the study. They represent the sub-regions reasonably, but surprisingly no respondent comes from Lošinj, although it has 13% of the tourist and 9% of the resident respondents. This may easily be due to missing returns and does not really affect the in total statistically very representative results.

Many questions of this second inquiry were already asked at the first round in 2003 making comparisons between the two inquiries (2003 and 2005/2006) possible. These comparisons are perhaps the most interesting result of this second phase, since they indicate trends in perception, while rankings of strengths and weaknesses remained very much the same. As already documented by the first inquiry, satisfaction among all three groups of actors is highest with the natural components of the offer, especially with climate, landscape and sea. But also the relatively good state of the environment is highly estimated. Components also highly appreciated are hospitality and language command of the local population as well as of employees in tourism. In contrast, dissatisfaction was usually expressed with tourism "content", i.e. tourism facilities and services in the narrower sense. It may, however, be regarded as remarkable and even comforting that tourists (i.e. consumers) expressed in general the more favourable opinion, while residents and especially tourism managers (i.e. producers) were much more critical. This justifies hopes that locals and in particular tourism managers are already working at the necessary improvements.

When tourism managers are asked for the weaknesses, dangers, strengths and chances of tourism in the Kvarner region, they draft indeed a very realistic picture. They criticise the traditional and undifferentiated sun & sea product with a distinct seasonality, the shortcomings in accommodation structure and quality, in tourism and transportation infrastructure and conceive conflict between different land use options, over settlement and visual destruction of the environment as

major dangers. The inquiry among the tourist group conveys in fact the impression that tourism structure has hardly changed compared to the pre-transformation period: it is still dominated by the motive of recreation with rather long durations of stay, by individual and private car tourism from the traditional Central European markets. Camps and private room renting as well as lower class hotels have still a large share and average expenses are modest.

But trends, as to be derived from the comparison between the 2003 and 2005/06 inquiries, look encouraging. Improvements were perceived as most remarkable with local kitchen – an impression that can only be supported by personal observations and expands the offer considerably. Improvements refer also to the quality of accommodation, the cultural offer, the sports and entertainment offer, to care for the environment as well as the price/offer relation. Just in the fields of excursions, congress and health tourism, souvenirs and children programmes respondents stated decline. For a long-term visitor this is perhaps most obvious with souvenirs, where the former in fact external, but original filigree, wood and copper work has not been replaced by typical autochthonous handwork, but by ubiquitous stuff, mostly imported from Taiwan and Korea.

Results for sub-regions and in many cases also for individual destinations deviate very often considerably from the regional average. This underlines their individuality and urges specific measures and strategies. It is the particular merit of the study to make all these deviations transparent by presenting and interpreting the results of the inquiry not only for the region in total, but also for sub-regions and individual destinations. This is not only done in verbal form, but very lucidly also by standardised tables and graphs. In conclusion, however, also the results for the region in total are evaluated enabling also action and measures at the regional level.

It is now up to tourism managers and politicians to make proper use of these data by developing strategies and new directions for tourism and in general regional development. It would, however, also be recommendable to start this undertaking again as a concerted effort in co-operation with science.

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