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, what refers as well to the Republic of Croatia. With this study, the authors intended to encourage and support the creation of an effective tourism policy in Croatia which would be based on the profiling of the certain target groups. Moreover, it was aimed that the results obtained from the customer analysis are compared to the market analysis of 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 the greater attendance of the targeted tourist groups.

This particular 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 the Russian tourists, in order to understand better their travelling motives and tendencies. In continuation, the attention was oriented towards the expectations of the Russian customer 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 needed information was a survey conducted among the Russian citizens about their travelling habits. The research was made on the basis of 166 participants belonging to different age, gender, profession and income groups. The sampling and distribution of the survey occurred between May and July 2016.

The results provided from the research indicate that Croatian tourism has a 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. That conclusion is based on the fact that Croatian tourist offer and the preferences of the Russian guests are compatible, i.e. they overlap in many aspects of the tourism industry. The results demonstrate that beautiful nature, cultural and historical heritage as well as the sun and the sea play the leading role in attracting more Russian tourists. Precisely those elements form the three pillars of the Croatian tourist offer. One the other hand, the profiling revealed that one of the most desirable destinations for the Russian guests are Italy and Spain, which both 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, Mediterranean region and tourism in general.

The purpose of the research is to serve as a foundation for analyzing the attractiveness of the other tourist destinations in the Russian market, as well as to be a general basis for more detailed profiling of various specific target groups of the Russian and other tourist groups.

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

1. INTRODUCTION

In the 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 level of security in the country and a favorable geographical position, Croatia already possesses extremely fertile foundation for the successful development of tourism and positioning at the very top of the most visited tourist destinations. Taking into account the unfavorable economic situation in the country and still present signs of crisis, it can be said that the tourist industry in Croatia is more important than ever before. In a sea of industries with negative growth rate and ongoing difficulties, tourism stands out with the ceaseless growth and noticeable benefits for the Croatian state budget. Among the EU country members, Croatia is the most dependent on tourism, as this branch has a much larger share in the GDP in comparison with other European countries. Over the last decades, the tourism industry has been developing in different directions. Consequently, the natural beauties do not constitute the only and sometimes not the most important prerequisite for the success of tourism in a certain country. Therefore, Croatia cannot base the entire tourism policy only on the natural basis, especially if bearing in mind the strong competition in Europe. Although the Croatian tourism can be assessed as successful one, the question is how much more unrealized potential and opportunities to maximize the results exist. Comparing the Croatian revenues and the revenues of competition [1] in this economic sector, with regard to the natural foundation that Croatia has, it seems that there is still a lot of unused capacity for the popularization of Croatia as a tourist destination and the increase in the revenue.

In addition to more effective tourism policy of the state, expanding the tourist offer, etc., one of the methods for increasing the attractiveness of Croatia as a tourist destination and encouraging the greater attendance refers to the profiling of the potential guests. It is logical that the guests belonging to different countries and social groups are not affected by the same needs and expectations, and orient the tourism policy in that direction, but without leaving out the possibility of attracting tourist which are outside of the target group. The subject of this research was the realization of the additional tourism potential through profiling the tourists. Given the large spectrum of the 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 a very desirable guests in greater numbers.
The purpose of the research was a detailed analysis of the Russian tourists, in order to understand better their motives in choosing a tourist destination, and the period of the year in which they most commonly realize tourist trips. In continuation, the attention was oriented towards the expectations and needs of the Russian customer to compare it with the offer of Croatian tourism, and to determine whether there is a possibility for an overlap. Russian tourists are visiting Croatia in a small percentage, but they belong to a group of tourists who daily spend the largest amount of money. 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 conducting an own investigation and using all available secondary bibliography. The obtained profile was followed by the comparison of the compatibility of 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 a better introduction of Croatia to Russian market.

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

II. METHODS

The study “Potential of Croatia as a tourist destination for the Russian market” was conducted among Russian citizens (living in Russian Federation) and that 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 whole Russian population. Age, income, profession and similar aspects were not categorized nor separately analysed in the results. Age and gender were registered, but not put in different analysis groups. The reason for not taking into consideration different ranges of the criteria is the purpose of this study, which intends to give 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 being Russian citizens, belonging to different age, gender, profession and income groups.

With regard to the age range, the intention was to include the participants of different age groups. The youngest participants are 19 years old. The oldest participants are 66 years old. Most of them are belonging to the younger age groups of 21 to 30 and 30 to 40. These two age groups include more than 50% of the participants. The average age of the participants is 33.89 years old. The previous studies demonstrated that preferences and selection in travelling change with regard to the age group of a 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 a various age categories.

The percentage of the participants who visited Croatia at least once is 25%. From that 25%, 77% have visited Croatia once, 13% have visited Croatia twice and 10% have visited Croatia 3 times. It was important that at least one fourth of the participants have first-hand experience with Croatian tourist offer to enable their insight on the elements they especially enjoyed during their travel, but also their opinion about those which they would single out as a negative experience.

The study was conducted in the form of a questionnaire in Russian language. This method was chosen because it was the most appropriate type of a survey for this 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 in order 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. One part of the questions belongs to the closed type. The answers were offered to the examinee in a form of a multiple choice. The other part belongs to the open questions, where the choice is left to the examinee to write whichever response and comment he/she wants. The closed type was used for the questions were an exact answer (from the few possible choices offered) was needed, when there was a certain topic especially in the focus of the study. The open form was selected for the questions where the intent was to observe the first idea which comes to mind to the examinee, without giving the potential allusions.

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 it. In addition, they will probably lose the concentration during the process of filling it out and approaching the end of it. On the other hand, it had to contain enough questions to provide sufficient results for an adequate analysis. Besides the 17 items, through the questionnaire the information about the sex, age and previous visits to Croatia was also collected.

The participation was anonymous, so that the examinees would express their opinion honestly and directly. However, the questionnaire was distributed and filled out in a 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 a Russian language in order to avoid any misunderstanding and vagueness.

III. RESULTS

The 17 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 the destination and travelling. The third category is concentrated particularly on a Croatia as a tourist destination.

With regard to the searching for the information, more than half of the examinees declared that their first choice in choosing a place where to obtain an information about tourist destinations are online websites (61,20%). Travel agencies occupy the second place with 24,20%. Friends and acquaintances as a source of information are in the third place with 11,50%. Only 3,10% of the participants marked previous experiences as their first choice when deciding about travelling.

Considering 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 travel reservations. If this results are compared to the previous question, it can be concluded that most of the Russian tourists inform themselves online about possible destinations for a visit, but when it comes to booking a concrete arrangement, hotel, transfers, etc. they prefer to use the services of travel agencies. Online channels are in second place with 22,30%. It is still a high percentage, but incomparable to the 62,10% which puts travel agencies as a stable leader in this category. 11,40% of the participants prefers to contact and make an arrangement directly with the providers of the services. 3,00% of the examinees tends to book accommodation or other tourist service on the spot, when they have already arrived to a certain destination, which was expected, because it is highly risky, especially if it is long distance trip. 1,20% percent chose an answer “other”.

The type of accommodation and other services differs according to what type of a tourist chooses it. Families, elderly people and young solo travelers will not prefer the same type of a vacation. Families tend to book all-inclusive hotels, elderly people prefer to travel during the spring and autumn, etc. The results show that majority of Russian tourists travel with family (62,70%). They also often travel with friends (23,50%). They tend to travel less in a company of a boyfriend or girlfriend (6,60%) and even less alone (5,40%) and with business partners (0,60%), 1,20% of participant answered “other”.

The analysis of the data provided by the examiners showed that a substantial majority of them (84,90%) marked hotels as a primary choice of accommodation in a certain tourist destination. The division of the other possible answers is: private apartments or rooms (8,50%), hostels (3,00%), camps (1,20%), yachts and cruise ships (1,20%) and other (1,20%). In continuation, considering that the percentage of tourists booking hotels is very high, it is interesting to observe which hotel category they mostly stay at while on vacation. The questionnaire also contained this topic and the results present four star hotels as the most wanted (53,80%). Three star hotels occupy the second place with 27,30%. In the third place are five star hotels (17,50%). Two star hotels were chosen by 1,40% of the participants as their primary choice. This question was answered only by the 84,80% of the total participants, the ones whose answer to the previous question was “hotels”. If we summarize the information gathered from these two items, the conclusion would be that Russian tourists, in general, mostly select four star hotels for their accommodation.

The results confirmed the hypothesis that the Russian guests would prefer travelling by airplane to Croatia, based on the large distance between Russian Federation and Croatia. 94,60% of the participants in the study declared that they would use the airplane as a form of a transport to visit Croatia. Airline transport reduces the time needed to travel to Croatia to 2h:50min between capitals Zagreb and Moscow. From other Russian cities it 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. Namely, 48,50% participants selected a charter flight and 46,10% preferred a regular flight as their primary choice. The rest of the answers belong to the car (3,60%) and train (1,80%).

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 suitable basis to attract more Russian guests. The information obtained from the analysis of the survey implies that more than half of the examinees travel primarily for a “sun and sea” motive (52,40%). The main motive of the 20,50% of the participants is a historical and cultural heritage of the country. A similar amount of people (19,30%) is mainly motivated by the beautiful nature. In continuation, sport and active vacation occupy the third place as a principal motive with the 3,00% of the answers. 1,20% of the participants chose gastronomy as the most important reason, and another 0,60% selected the group including the festivals, entertainment and nightlife. 3,00% of the answers belong to other motives. Wellness and health reasons have proven to be unpopular among Russians, since nobody marked that precise answer.

In addition to the topic in the previous paragraph, the questionnaire required form the participants to declare which is the main factor which would make them return to a certain tourist destination. The item was presented in a form of an open-ended question. From the answers provided from the examinees, it is clear that there are five principal reasons which would stimulate Russian guests to return to a certain country they have already visited. Price seems to play a decisive role in attracting the Russian guests to visit the same tourist destination again. However, other four elements are as well highly represented among the answers. Other elements which were singled out were an overall pleasant experience, quality 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 respondents (41,50%) tend to travel during the summer. Autumn occupies the second place with 24,50%. 13,30% of the participants marked spring as the season during which they prefer to travel. Winter as a primary option was chosen by 10,20%. 10,50% of the participants declared that they either prefer to travel during all seasons 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 accordance 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 67,60% of the participants in the study would stay in Croatia at least 10 days if they were visiting Croatia. The results confirm that Russian guests tend to stay longer in one destination, which makes them a desirable tourist group. In details, majority of Russian tourists (36,40%) would stay 10 days in Croatia, 19,70% would stay 14 days (2 weeks), 14,00% chose to answer 7 days (one week), and 11,80% wrote 8 or 9 days. In continuation, smaller percentages belong to 12 days (6,40%) and to the very short or very long stays: 6,60% for less than 7 days and 5,10% for more than 14 days.

The participants had 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 Croatia has a 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 Russian tourists will categorized and divided into three groups according to the 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 of the countries. The most emphasized factor was the diversity of the tourist offer based on the combination of the sea and beaches, Mediterranean climate, historical and cultural aspect and beautiful scenery. Second category refers to the Asian countries in general, with the 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. 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 accordance with the information gathered by Croatian Tourist Board in 2013. The aim was to observe the eventual 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, Mediterranean climate, cultural and historical heritage, and similar lifestyle.

One of the most significant information to gather from the study was to understand the perspective of Russian tourists about Croatia and its tourism offer. Therefore, the questionnaire included the question do they (the participants) consider Croatia as a very attractive, attractive, not attractive or not at all as tourist destination. Moreover, they had to provide the explanation 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 89,70% of the examinees consider Croatia to be attractive or very attractive tourist destination. 29,50% decided for very attractive, while 60,20% marked attractive. 10,20% declared that Croatia is not attractive destination, and only 0,10% chose not attractive at all. In continuation, the explanations for a particular option were observed. The participants who answered that Croatia is an attractive or very attractive tourist destination were emphasizing almost only one factor – beautiful nature and coastline. That appears to be the leading element without any competition. Other reasons in favor of the high attractiveness of Croatia were affordability and short flight time from Russia. A smaller amount of the participants did not provide a concrete reason for Croatia, but explained that any interesting country they already have not visited is attractive for them. The 10,30% of the participants who perceive Croatia as not attractive or not at all appoint the high prices or that they just don’t 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 toward the participants with firsthand 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. Majority of the examinees 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 Croatia. Some of the participants indicated that their most important reason to visit Croatia was a well-known town of Dubrovnik, protected by the 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 a certain elements of Croatian tourism, more participants emphasized the positive experience. Some of them simply pointed out that they were satisfied with everything. The most accentuated individual factor is a beautiful nature, especially Plitvice Lakes National Park. The participants often added the clean sea and peaceful small towns. They enjoyed Mediterranean cuisine and were content with the approach of the local people. Only a small amount of the participants singled out a certain 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 the stone platform. That point of view is not completely unexpected, as it is known that Russian tourists generally prefer sand beaches [3].

The results related to the visa regime demonstrate that for Croatia visa is still a restrictive factor. 41,00% of the participants declared that the obligation of obtaining a visa certainly demotivates them from travelling to Croatia. 23,50% confirm that the elimination of visa would most probably stimulate them to visit Croatia. 21,70% answered that they would probably consider more Croatia as their tourist destination, if the visa was not necessary. Only 13,90% marked that visa is not a relevant factor for their choice.

The source of information about the tourist destinations is highly relevant information for strategy planning in tourism. If the information about that matter is known, that facilitates the decision about the targeted place of providing the information about the tourist destination to the public. 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 certain 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 consequently be the number of tourist who actually decides to book a travel to Croatia. It would be interesting to study this topic in more details in the further researches, because there are some online websites whose popularity is rapidly growing and are starting to influence significantly the world tourism, such as TripAdvisor, Booking.com, etc. This type of online travel agencies and websites, as a results of their appealing and efficient strategy, are gathering millions of tourists in one place. That is why more and more tourist service providers are contracting with those online companies. Being present there and have either positive or negative review makes a substantial difference, because those websites provide an instant reach to millions of tourists. Considering that such large number of Russian tourists search for the information online, it could be helpful to put this information in relation with a concrete websites to observe which ones have the strongest impact on tourists.

For the same reasons around the topic of accessing the information, it is useful to know where Russian tourists mostly book their travels to put a special emphasis on that channel in the strategy plan. On the one hand, if 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 tourists prefer to use travel agencies as their booking partner, then the strategy should target contracts with influential travel agencies. This habits can vary among different target groups (age, nationality, travel motive criteria, etc.), so the general strategy might not apply to all of them. In that case, it is necessary to adjust the strategy and according to specific target groups.

It is difficult and sometimes inefficient to have a strategy for each and every group, but the general strategy should definitely be adapted for mayor tourist categories. Also, for the ones that are not playing a significant role in tourism of the country, but are for some reason of strategic importance. For example, Russian tourist are considered to be “attractive” tourist group, because they stay longer in one place than many other, and they tend to be at the top of the “biggest purchaser” lists. On average they spend more than 110€ per person per day on vacation [3]. If Croatia attracts just few percent of
Russian tourists, it would be noticeable in the revenues. However, currently Russian tourists occupy a small share in the overall Croatian tourist structure. That 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 a potential to attract even a bit more Russian tourists to Croatia, with just a slight additions or changes in the strategy, it would be beneficial for Croatian tourism to introduce and execute 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 travel reservations. If this results is compared to the previous question, it can be concluded that most of the Russian tourists inform themselves online about possible destinations for a visit, but when it comes to booking a concrete arrangement, hotel, transfers, etc. they prefer to use the services of travel agencies. Possibly they want to confirm the information collected on the internet 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 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 the fee. 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 the cannot compensate the perks given to them with a number of clients. They usually get a few percent commission fees.

The hotel sector is the key initiator of the investments in the tourist industry in Croatia, and there should be a special attention given to its development. Hotels participate with the large share of 48% in the overall income from the tourist accommodation capacities, but they are represented with only 13% in the structure of Croatian tourist accommodation offer [4]. In addition, they form a part of the 32% in the total amount of the tourist overnight stays. These numbers show the high potential of the hotel sector. Currently there are numerous investments 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 Russian tourists, confirms the need to restructure the existing accommodation structure in Croatia. Hotels participate with almost the smallest share in the structure, while it should be the opposite. 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, because it is a long-term process. The first step would be to determine the desired growth rate of hotel category in the accommodation structure throughout the years and try to execute that plan to get at least a rate close to the established objectives.

Transport is another influential variable in the tourist industry, i.e. it enables the tourist flow between different countries and continents. Tourism strategy of each country should certainly contain the transport as one of the crucial factors. If one of the strategic objectives is to attract higher number of tourists, then one of the key steps in achieving the goal is assuring the availability. Only in a negligible percent of the tourist cases, the difficulty in reaching the destination represents 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 the travel and additional offer along the way, which could induce a tourist to spend even more than planned [6]. The last element refers to various shops, coffee shops and restaurants which are located next to the highways, at the ferry ports or at the airports. Additional offer has the ability to bring the trip closer to the comfortable and interesting experience, rather than to be a necessary annoyance. In 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 the other countries. The biggest travel companies in Russia are TEZ Tours, Pegas, Russian Express, Ascend Travel, Pols, TUI, Biblio Globus, Natal 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 Croatia is one of the countries to which Russian tourists predominantly travel by airplanes.

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 suitable basis to attract more Russian guests. For example, natural background, cities 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 he or she can be easily attracted to Croatia. On the second hand, if a tourist travels for fashion motives, or, for example, architectural motives, then Croatia does not have the background on which to compete. It can be observed from the results that for more than 90,000% of the Russians participating in the study the most significant motives for travelling are sun and sea, historical and cultural heritage and beautiful nature. Considering that Croatia is basing its tourism industry precisely on these three pillars, it can be concluded that there definitely is a compatibility between the preferences of the Russian tourists and Croatian tourist offer. This fact is one of the elements which support the hypothesis given in this research, which assumes that Croatia has the potential to attract Russian guests and enlarge their share in the overall tourist structure.

Croatian Ministry of Tourism as well as the private investors are putting an effort in creating an efficient strategic plans which would extend the tourist season in Croatia. The success is gradually being achieved, considering that the capital city Zagreb was declared the 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 the 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 last years, it can be seen that the summer season (June – September) is certainly the period when Russian tourists are highly interested in visiting Croatia. The results shows that the interest for Croatia starts to grow during May, reaches its peak during July and August and has a considerable decrease during October.

The results obtained from this survey about the most popular tourist destinations among the Russian tourists are in accordance with the information gathered by Croatian Tourist Board in 2013. The aim was to observe the eventual 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, Mediterranean climate, cultural and historical heritage, and similar lifestyle. The next step for further study would 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 amount 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 the 2016 to analyse if the general geopolitical and
economic situation has affected the list of 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. 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 now first needed to go through the visa procedure, which is costly and time consuming. The regulations presented an obstacle especially for the tourist groups, such as the tourists from Russia, Ukraine and Turkey, whose overnight stay statistical showed a constant growth in the years before [8]. In 2012 Croatia was visited by almost 200,000 Russian tourists, what put them in 10th place in the overall tourist structure [9]. In order to reduce the negative effects for Croatian tourism, the government developed a visa system which would facilitate the issue of visa for tourists from non-EU countries, especially from Russian Federation. The procedure for Russian citizens was reduced to maximum 5 days from the application. In addition, visa was not issued only through the Croatian embassy in Russia, but also in particular 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 the similar tourist offer, but without the additional difficulties? On the other hand, it was shown in the previous result analyses that Italy and Spain are one of the most desirable tourist destinations for Russian citizens. For both countries Russian tourists need to obtain a visa. This fact demonstrates that visa does not have to be an excluding factor for a tourist destination.

Croatian tourism recorded a constant growth in the overnight stays of Russian guests in the years before 2013, when Croatia became an EU member. The new adopted EU visa regime turned out to be an obstacle, since the number of Russian tourists visiting Croatia started to decrease in 2013. However, it can be seen from the example of Spain and Italy, the visa regime doesn’t 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 visa obligation for Russian tourists, but are at the top of the most popular countries Russians would or have been visiting. Realistically, the visa regime is one of the elements which cannot be eliminated. The political situation in EU and in Croatia makes it impossible for Croatia to withdraw the visa necessity for Russian citizens. Nonetheless, Croatian government can and already has been putting an effort in facilitating the visa procedure for Russian as well as Ukrainian and Turkish citizens. However, the visa obstacle can be compensated by efficient strategic plan, which would focus the factor which can be changed or adapted to 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 most popular tourist destination, such as Turkey, Egypt, etc., with the new ones. Croatia has a potential to use that newly created gap in the Russian tourist market in its favour. With a well-thought strategic plan Croatia could influence on 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.

The analysis demonstrates that beautiful nature, cultural and historical heritage as well as the sun and the sea play the leading role when Russian tourists are choosing their tourist destination. Those elements are as well the three pillars on which Croatia is building its tourist offer and its principal advantages in tourism in general [10]. It can be concluded from the Top 5 destinations visited by Russian guests that they enjoy Mediterranean climate and cuisine. Italy and Spain, which belong to the most popular tourist destinations in 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 one with regard to the distance and short comfortable travelling.

The lack of the 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. 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 realized to determine whether there are still more options to facilitate the process, especially with regard to the developments in the technology and online applications. Another weakness is related with the accommodation structure in Croatia. It was presented that hotels bring the highest profits in the Croatian tourist industry, but are represented with the smallest share. Russian tourists, as well as other tourist groups, prefer to use hotel accommodation while on vacation. 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 offer, which includes different restaurants, numerous excursions, city tours, events during the summer... On the other hand, the rest of the destinations usually provide only one type of the tourism, one particular specialty. Therefore, the additional offer should be developed at the same level in most of the destinations.

Current geopolitical situation creates new opportunities for Croatia to retrieve the part of the “lost” Russian tourists after 2013. Due to the war and political instabilities in a certain popular tourist destinations in the Russian market, Russian tourists are forced to consider other destinations, which are less popular. That is why the accent is on the “right strategy in the right time”, when there is needed even less effort to attract Russian guests. The political situation can simultaneously present a threat, because there are increasing instabilities between Russia and EU (and 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 high number of all-inclusive resorts with a wide additional offer and 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 the more intense collaboration between Croatian and
Russian travel agencies and tourism websites. In addition, it would be beneficial if more websites related to the Croatian tourism had the version in Russian language. Some of the participants in the study declared that they do not know have a sufficient information about Croatia, so the information needs to be as available and easy to find as it can be.

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

It would be inefficient to place and promote in the Russian market type of the tourist packages which are not quite desirable. Therefore, the packages oriented toward the Russian market need to be thoughtfully planned and designed according to the preferences of the Russian tourists. That implies mostly summer packages in the locations where the beautiful nature and cultural and historical heritage are combined, with a wide range of hotel options and close to airport, but with an acceptable price. It would be useful to include the possibility of various excursions and events to create an image of rich additional offer. All-inclusive models are very attractive for Russian, as well as the other tourist groups, but they represent a disputable topic. On the one hand, they are stimulating the high booking of a certain hotel. On the other hand, all-inclusive model has a negative impact on the destination tourism, because the tourists who book 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 sand beaches should be advertised. Destinations which possess purely sand 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 the general benefits for the tourism industry, not only for attracting the Russian guests. However, it is a long-term process which implies a detailed planning of the investment according to the tourists’ needs. One attractive hotel or resort can contribute to the awakening of the destinations which are less popular or have potential, but have been neglected with regard to the tourism aspect. The long-term construction and reconstruction plan should be based on the analysis which will show which destinations don’t have at least one representable hotel or in which destinations the demand for the hotels (anaysed according to specific types of the hotels) is higher than the real current capacities.

Visa regime for Russian citizens cannot be changed, but effort should be put in figuring out more possible ways to facilitate the procedure for obtaining a Croatian visa.

It is important to make Russian tourists feel welcome and pleasant in Croatia. One of the ideas how to achieve that could be to determine a few popular “Russian destinations”, which will be promoted for the forthcoming season as a special offer. These kind of packages/offers 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 potential to attract more guests from the Russian Federation. Croatian tourist sector has a 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. That conclusion is based on the fact that Croatian tourist offer and the preferences of the Russian guests are compatible, i.e. they overlap in many tourist aspects. Moreover, until the 2013 the number of the arrivals of the Russian tourists in Croatia was constantly increasing. That fact demonstrates that every year Croatia was becoming more and more attractive tourist destination in the Russian market.

Croatia can increase the number of incoming Russian tourists and their share in the overall tourist structure by implementing certain concepts in the tourist offer. Until the 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 the 2013 when Croatia became a member of the EU. However, the guidelines from this master thesis show that there is a possibility to compensate that negative new characteristic with additional promotions and strategic adaptations in the tourism plan, without essential changes in the overall Croatian tourism strategy. Additionally, the geopolitical flows make now the perfect time to act in the Russian market with the upgraded and refreshed strategic plan. The first and the most significant objective is to bring back the Russian tourists in the Top 10 in the overall Croatian tourist structure. This master thesis provided certain ideas and suggestions which can serve as a foundation for a more detailed reflection and analysis, in order to create a real strategic plan which will be executed.
VI. REFERENCES