



ISCTBL 2020

INTERNATIONAL SCIENTIFIC CONFERENCE

Универзитет „Гоце Делчев“ –
Штип

Goce Delchev University
Shtip

Факултет за туризам и бизнис
логистика

Faculty of Tourism and
Business Logistics

**Трета Меѓународна Научна Конференција
Third International Scientific Conference**

**ПРЕДИЗВИЦИТЕ ВО ТУРИЗМОТ И БИЗНИС
ЛОГИСТИКАТА ВО 21 ВЕК
CHALLENGES OF TOURISM AND BUSINESS
LOGISTICS IN THE 21ST CENTURY**

**ЗБОРНИК НА ТРУДОВИ
CONFERENCE PROCEEDINGS**



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Prof. Gligor Bishev, University Professor and Chairman of the Board, Sparkasse Bank-Skopje – “*The impact of the pandemic on economic developments*”

Peter Tabak, Executive Director, Leading Regional Economist for Economics, Policy and Governance in the Western Balkans Vice-President for Policy and Partnerships, European Bank for Reconstruction and Development - “*Economic outlook for the Western Balkans during and after the epidemic*”

Milan Zdravkovic, Executive Director of the Distribution System Operator in J.P Srbijagas, Belgrade, Serbia – “*Supply of natural gas in COVID-19 conditions - experience and expectations*”

Prof. Misko Dzidrov, University Professor and Vice-rector for Teaching and Students, Goce Delcev University of Stip – “*UGD in a time of pandemic*”

Prof. Tatjana Boskov, University Professor and Dean of the Faculty of Tourism and Business Logistics, Goce Delcev University of Stip – “*The impact of coronavirus on global growth and global supply chain shifts*”

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УНИВЕРЗИТЕТ „ГОЦЕ ДЕЛЧЕВ“ - ШТИП
GOCE DELCEV UNIVERSITY OF STIP

ФАКУЛТЕТ ЗА ТУРИЗАМ И БИЗНИС ЛОГИСТИКА
FACULTY OF TOURISM AND BUSINESS LOGISTICS

ТРЕТА МЕЃУНАРОДНА НАУЧНА
КОНФЕРЕНЦИЈА

THIRD INTERNATIONAL
SCIENTIFIC CONFERENCE

ПРЕДИЗВИЦИТЕ ВО ТУРИЗМОТ И БИЗНИС
ЛОГИСТИКАТА ВО 21 ВЕК

CHALLENGES OF TOURISM AND BUSINESS LOGISTICS
IN THE 21ST CENTURY

ЗБОРНИК НА ТРУДОВИ
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13 ноември, 2020, Штип / Shtip, November 13th, 2020

ПРЕДГОВОР

Факултетот за туризам и бизнис логистика при Универзитетот „Гоце Делчев“ во Штип, беше организатор на Третата меѓународна научна конференција „Предизвици на туризмот и бизнис логистика во 21 век“. Конференцијата се одржа на 13 ноември 2020 година на платформата Microsoft Teams, со повеќе од 90 учесници од матичната земја и странство. Оваа година Меѓународниот научен комитет брои еминентни професори од нашата земја и над 15 странски земји како Израел, Шпанија, Франција, Молдавија, Италија, Грција, Египет, Полска, Турција, Романија, Бугарија, Србија, Хрватска, Босна и Херцеговина и Словенија.

Целта на оваа конференција е да промовира поголемо разбирање на бизнис администрација, логистиката, туризмот и угостителство во однос на управувањето, економијата, образованието и претприемништвото. Ова подразбира дека фокусот на учесниците го насочивме кон најновите трендови и предизвици во врска со развојот на туризмот, менаџирањето со компаниите, пазарот на труд, можностите за придобивки и профит, изгледите за подобра конкурентност на меѓународниот пазар, што пак е императив за финансиската стабилност на нашата земја во целина.

Имено, со пристигнатите трудови и авторските истражувања се оствари целта на конференцијата - а тоа е оценувањето на тековната состојба и идните изгледи за развој на микро план што се однесува на домашниот пазар, како и движењата на глобалната економија, подготвувајќи ја бизнис заедницата за предизвиците со кои ќе се соочуваат при остварувањето на нивните цели, што де факто влијае врз одржувањето на финансиите особено во времето кое го живееме под притисокот на пандемијата.

Препораките кои се пренесоа се однесуваат како да се зајакнува капацитетот на компаниите како и промените во регулативите кои го диктираат нашиот пат кон ЕУ. Дискусиите во текот на конференцијата беа одговор на тоа како реагираа и се позиционираа менаџерите на финансиски средства во услови на голем пазарен ризик, пазарни шокови и турбуленции и како треба да се подготвуваат инвеститорите во поедини сектори. Трудовите прикажаа изгледи и кон идната интеграција на земјите од Западен Балкан, со осврт на досегашните постигнувања и идните предизвици пред овие економии како и размена на искуства на сите учесници кои сме денес присутни од повеќе земји.

Токму овие препораки треба да бидат двигател на процесите на реформата во насока на подигање на квалитетот на образованието заради поголема продуктивност на трудот, конкурентност на економијата и намалување на неусогласеноста на понудата на вештини и компетенции како и побарувачката на пазарот на труд.

Постигнувањето на овие цели е заедничка задача на сите оние што се во позиција да го дадат својот придонес за имплементација на реформите во општеството. Токму тие реформи, тие промени во начинот на пристап, методологија на работа и организација, не треба да ги правиме само за да станеме дел од економскиот блок, туку да бидат во насока да постигнеме нешто друго, многу позначајно, односно сите напори што ги правиме да бидат за остварување на повисок степен на благосостојбата на нашите граѓани, за создавање на достоинствени услови за живот и работа.

Во регионот, меѓутоа и пошироко, во Европа, искуствата се најразлични. Наидуваме на успешни, и на не толку успешни модели. Токму ваквите научните конференции, дебатите што се развиваат тука, се најдобриот начин за размена на искуства, за идентификација на предизвиците и перспективите, за споредување на моделите и третирањето на нивните недостатоци или предности, меѓутоа и презентирање

на можните нови комбинирани модели. Едукацијата на новите генерации кои ќе бидат подготвени да се соочат со предизвиците што ги носи глобализацијата, е заеднички предизвик на Универзитетите, на бизнис заедницата, но и на централната и локалната власт.

Штип,
13 Ноември 2020

Главен уредник
Проф. д-р Татјана Бошков, *Декан*

PREFACE

The Faculty of Tourism and Business Logistics in Gevgelia, part of the University Goce Delchev from Shtip, hosted the Third International Scientific Conference, "Challenges of Tourism and Business Logistics in the 21st Century". The conference was held on 13th of November 2020 on the platform Microsoft Teams, with more than 90 participants from the country and abroad. This year the International scientific committee included eminent professors from our country and more than 15 from foreign countries, such as Israel, Spain, France, Moldova, Italy, Greece, Egypt, Poland, Turkey, Romania, Bulgaria, Serbia, Croatia, Bosnia and Herzegovina and Slovenia.

The aim of this conference is promoting a greater understanding of the business administration, logistics, tourism and hospitality in terms of management, economics, education and entrepreneurship. In that context, the focus of our participants was on the latest trends and challenges related to tourism development, company management, labour market, opportunities for gain and profit, opportunities for better competitiveness in the international market, which is imperative for the financial stability of our country entirely.

Furthermore, the conference papers and authors' researches fulfilled the aim of the conference, the assessment of the current situation and future prospects for the development of the micro plan in terms of the domestic market, as well as the global economy changes, prepared the business community for the challenges that will they face during their goal achievement, which de facto affects the maintenance of finances especially in the time we live under the pandemic pressure.

The detection of the conditions that have been presented is a real mirror of where we are, where we have been, and what is even more difficult, to answer the question what next? Achieving these goals is a common task of all those who are in a position to contribute to the implementation of reforms in society. Exactly those reforms, those changes in the way of approach, methodology of work and organization, we should not make only to become part of the economic block, but to be in the direction of achieving something else, something much more significant - efforts for achieving a higher degree of well-being of our citizens, for creating dignified living and working conditions.

In the region, but also beyond, in Europe, the experiences are diverse. We come across successful and not so successful models. Exactly such scientific conferences, debates that develop here, are the best way to exchange experiences, to identify challenges and perspectives, to compare models and how to treat their disadvantages or advantages, but also to present possible new combined models. The education of the new generations that will be ready to face the challenges posed by globalization is a common challenge of the Universities, the business community, but also of the central and local government.

Shtip,
November, 13th, 2020

Editor
Tatjana Boshkov, Ph.D. *Dean*

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STATISTICAL ANALYSIS OF TOURIST ARRIVALS AND NIGHTS IN CROATIA DURING THE SARS-CoV-2 PANDEMIC

Cvetan Kovač¹; Ana Šijaković²

Abstract

The aim of this paper is to present a statistical analysis of tourist arrivals and overnight stays in the Republic of Croatia in 2020 during the SARS-CoV-2 pandemic in relation to 2019. The introductory part of the paper presents a unique online information system eVisitor that connects all tourist boards in the Republic of Croatia and provides a daily insight into the state of tourist traffic. Based on data from the eVisitor information system, the paper presents a statistical analysis of tourist arrivals and overnight stays in the Republic of Croatia during the SARS-CoV-2 pandemic in 2020 compared to the same period in 2019.

Key Words: *tourist arrivals and overnight stays, eVisitor, SARS-CoV-2, statistical analysis*
JEL Classification: Z32

Introduction

At the beginning of the year, it seemed that the Croatian economy would continue to grow steadily and achieve record tourism results, but in just a few months the coronavirus pandemic (SARS-CoV-2) shook the world economy. When the first news of a coronavirus outbreak in the Chinese city of Wuhan in mid-January, no one could have imagined that three billion people would soon be quarantined (Kovač et al., 2020). No one could have imagined that many parts of the economy would be paralyzed, state borders closed, hundreds of thousands of flights and public events cancelled. The EU tourism sector is under unprecedented pressure due to the pandemic. Due to travel restrictions and other activities, tourism in the EU and around the world was gradually phased out in the first half of 2020. According to OECD estimates, this decline will range from 45% to 70% depending on the duration of the health crisis and the speed of recovery. According to estimates by the tourism sector, the loss of revenue at European level has reached 85% for hotels and restaurants, 85% for tour operators and travel agencies.

Incidence of coronavirus-related diseases

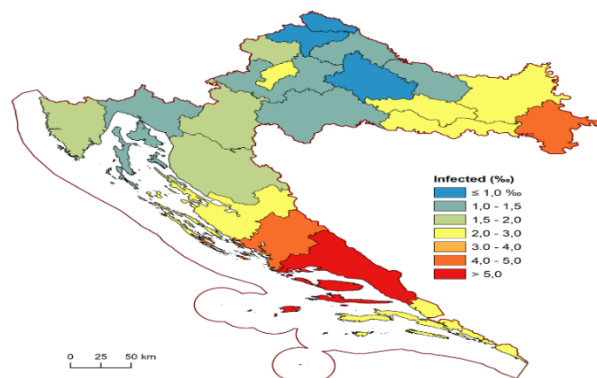
The incidence of coronavirus-related diseases in Croatia is part of the worldwide CV-19 outbreak causing severe acute respiratory syndrome (SARS-CoV-2). The first case in Croatia was reported on 25 February, while the first recovery was reported on 12 March and the first death from the coronavirus on 18 March, 2020 (Kovač et. al., 2020). According to the updated data of the Croatian Institute of Public Health (CIPH), on September 1, 2020, there were 10,414 registered cases in the Republic, of which 7,735 infected persons recovered and 187 died. The highest number of registered cases of infection was recorded in the Split-Dalmatia County

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(2505), the City of Zagreb (2403), the Osijek-Baranja County (795) and the Vukovar County (630), Figure 1.

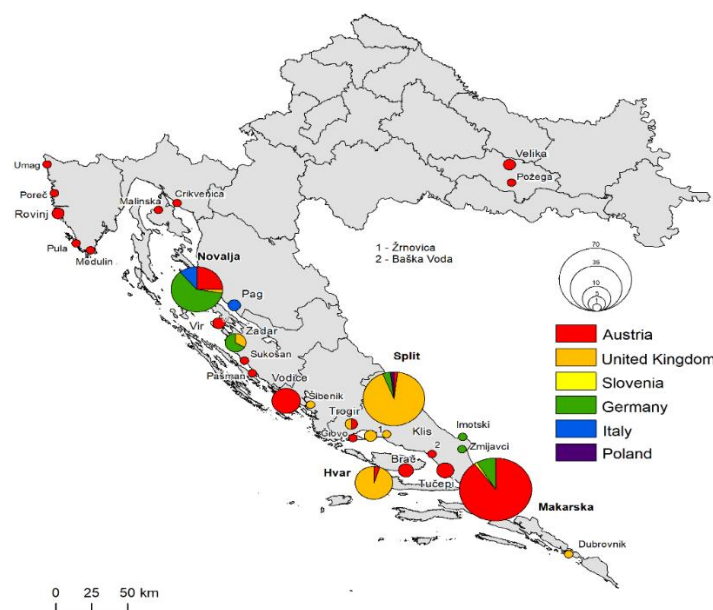
Figure 1.: *Infected with the COVID-19 in Croatia by the beginning of September 2020*



Source: *CNIPH, 2020*

Furthermore, it is interesting to note the number of 362 infected foreign nationals according to the place of source of infection, especially in the height of the tourist season, in the period from 7.7. to 28.8. 2020. According to the data available in the system EWRS - European Early Warning and Response System (Early Warning and Response System), the Figure 2 shows the number of infected foreign nationals by place of source of infection for the period from 7.7. to 28.8.2020. In addition to the data shown in Figure 2, it should be noted that 11 cases with an unknown place of infection were reported, while 122 infected foreign nationals resided in several places.

Figure 2.: *Number and structure of foreign tourists infected with the COVID-19 in Croatia (7/7/20 – 28/8/20)*



Source: *CIPH, 2020; EWRS, 2020*

Tourism as a strategic sector of the Croatian economy

Tourism is one of the strategic sectors of the Croatian economy, on which depends a significant percentage of GDP and millions of jobs that are directly or indirectly related to it. It is also a dynamic and creative activity that has evolved over the decades to adapt to the new demands of guests. The Tourism and Catering Sector in the Republic of Croatia is one of the strategic sectors that not only strongly supports the economy but also stimulates the development and growth of other economic sectors such as agriculture and food production, the personal services sector, and sports and health. Rarely, in which state of the world, tourism is the fifth of GDP, as is the case in Croatia, which makes it a strategic economic branch which, despite low profitability, enables the country's international competitiveness. (Stojčevski et al., 2019). For Croatian tourism, 2019 was the best year so far, with almost 21 million arrivals and 108.6 million overnight stays, which is 2.4 percent more than in 2018, and in 2020 according to the projections of the Ministry of Tourism from January 2020. year, positive trends were expected to continue with 3 to 5 percent higher tourist traffic. But at that time no one could have guessed what kind of crisis would affect us in just a few months. According to Eurostat estimates, there are 2.3 million tourism companies in the European Union, employing 11.7 million people. This is nine percent of employees in the business sector, and 22 percent in the services sector. In terms of the share of employees in tourism in relation to total employment, Greece leads, where more than a quarter of employees work in activities closely related to tourism. It is followed by Cyprus with 20 percent of employees in tourism, Ireland (14%), Croatia and Austria (13%) and Italy (11%). On the opposite side is Poland with only four percent of employees actively working in the tourism industry. When it comes to Croatia, the percentage of employees in tourism is not so high compared to some other European countries. However, in Croatia, the number of employees in tourism does not reflect the huge share of tourism in the total economy, given that a significant number of people who earn income from tourism are not formally employed. This is a consequence of the structure of accommodation capacities dominated by private accommodation (apartments and other forms of short-term tourist rent), which makes up almost 60 percent of the tourist offer. On the other hand, hotels, which make up the largest employment generator, make up only 16 percent of the total accommodation offer. Among the most important indicators of tourism development we can include several factors (economic indicators, social indicators, environmental indicators, spatial indicators) and for the purposes of this paper, data on tourist arrivals and overnight stays are presented as a tourism indicators (data downloaded from the website of the Central Bureau of Statistics and the eVisitor information system).

Information system- eVisitor

eVisitor (<https://www.evisitor.hr/Info/hr-HR/>) is a unique online information system that connects all tourist boards in the Republic of Croatia and provides daily insight into the state of tourist traffic, an up-to-date database of accommodation facilities and service providers accommodation, real-time reporting for statistical and marketing purposes, and better control of the collection of the sojourn tax with the aim of generating higher revenues in the tourism sector. For this reason, the information system for registration and deregistration of tourists can be used as a unique and easily searchable database of all accommodation providers or a single database of all accommodation facilities operating in the territory of the Republic of Croatia. In that sense, eVisitor has replaced the previous individual registers, which are kept separately for individual counties, ie by the Ministry of Tourism. Data processing and analysis and reporting for statistical purposes allows monitoring of tourist movements almost in real time, with an interval of up to 24 hours, according to one or more criteria such as length of visit, location, gender, age, country of residence and others. This enables the implementation of an active marketing policy and provides the public with up-to-date data on tourist movements.

Since part of this data is available free of charge via the website, it can also be used by all economic entities that provide tourist services to adjust their offer, thus achieving a synergistic effect of all tourist stakeholders on promoting Croatian tourism and achieving competitiveness. In addition, access to the database enabled the Central Bureau of Statistics and scientific research institutions to conduct further and more complex statistical and other analyses related to the tourism sector.

Tourist arrivals and nights as a physical indicator of tourism

Unlike the number of realized arrivals, the number of realized overnight stays of tourists is a more reliable indicator of tourism development and a firmer basis for a more complex economic analysis. The reason for this is the lack of multiple registration, as is the case with the arrival of tourists who change the place or object of their stay and the fact that based on the realized overnight stays generate significant income based on tourist spending, but also other related economic effects. A limiting factor in accurately keeping statistics on the number of overnight stays is the impossibility of registering all realized overnight stays in the Republic of Croatia (due to the existence of the gray economy), which is why the statistics show only a formally registered (reported) indicator of tourist overnight stays. It follows that the actual number of overnight stays is higher than that registered in the statistical reports (Čavlek et al., 2011). Tourist overnight stay is a statistical unit that records tourist traffic. By recording overnight stays, the total size of tourist traffic can be determined, but not the number of tourists, individuals or tourist visitors, because the same visitor can and as a rule realizes more overnight stays during a stay in one tourist destination or country. This term can serve well to determine various derived indicators of tourism development. As a "realized (tourist) overnight stay" it serves the needs of planning and analysis of catering companies that provide accommodation services. With the help of this unit, all accommodation facilities can calculate the degree of their utilization, the average length of stay of guests of a nationality and perform other necessary indicators of business success (Vukonić & Čavlek, 2001).

Total indicators of tourist traffic January-august 2020/2019 years

According to the eVisitor system, in the period January-August 2020 the number of foreign tourist arrivals was 5.548,011 (index 37.66), and at the same time 1.295,308 domestic tourist arrivals were recorded (index 72.75). In the same period, 38.334,109 overnight stays of foreign tourists were realized (index 48.44) as well as 9.201,523 overnight stays of domestic tourists (index 83.61). The total (foreign and domestic) number of arrivals in the period January-August was 6.843,319 (index 41.44), while 47. 535,632 overnight stays were recorded (index 52.73).

Table 1. *Arrivals and overnight stays of domestic and foreign tourists for the period January - August 2020/2019 (all capacities)*

	I-VIII 2020.		I-VIII 2019.		% Nights	indeks 2020./2019.	
	Arrivals	Nights	Arrivals	Nights		Arrivals	Nights
Foreign tourists	5.548.011	38.334.109	10.142.830	50.130.367	87,87%	37,66	48,44
Domestic tourists	1.295.308	9.201.523	1.394.285	6.920.801	12,13%	72,75	83,61
Total	6.843.319	47.535.632	11.537.115	57.051.168	100,00%	41,44	52,73

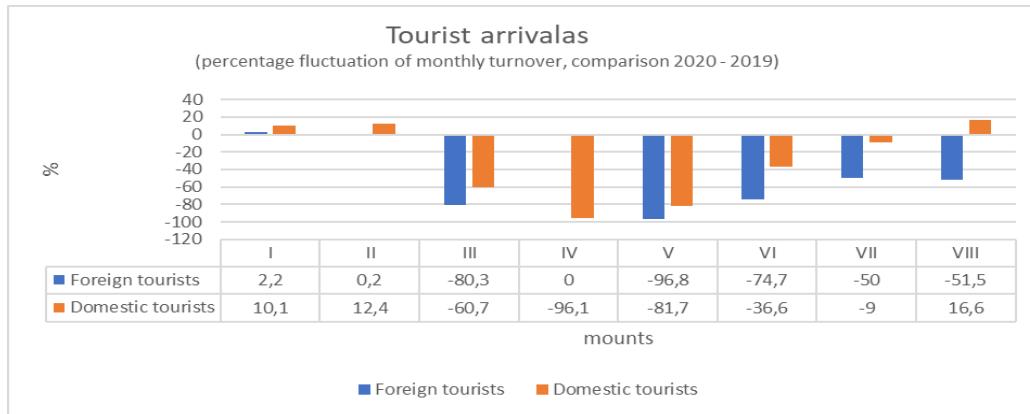
Source: CNTB (eVisitor data + integrated eCrew)

Indicators of tourist traffic by months January-August 2020/2019 years

According to the eVisitor system, during the first eight months of 2020, the following indicators of tourist traffic in the Republic of Croatia were achieved: In January 2020, 126. 619 arrivals of foreign tourists were recorded (growth of 2.2%) and 100. 330 arrivals of domestic guests (growth of 10.1%). The number of overnight stays of foreign tourists in January amounted to 389.194 (growth of 8.6%), while domestic tourists realized 248.554 overnight stays (growth of 5.4%). Total tourist traffic (foreign and domestic tourists) in January amounted to 226. 949 arrivals (growth of 5.5%) and 637.748 overnight stays (growth of 7.3%). In February 2020, 176,664 arrivals of foreign tourists were recorded (growth of 0.2%) and 110,662 arrivals of domestic guests (growth of 12.4%). The number of overnight stays of foreign tourists in February amounted to 478,899 (growth of 9.3%), while domestic tourists realized 248,299 overnight stays (growth of 7.4%). Total tourist traffic (foreign and domestic tourists) in February amounted to 287,326 arrivals (growth of 4.6%) and 727,198 overnight stays (growth of 8.6%). In March 2020, 64,861 arrivals of foreign tourists were recorded (a decrease of 80.3%) and 53.375 arrivals of domestic guests (a decrease of 60.7%). The number of overnight stays by foreign tourists in March was 279.733 (down 64.5%), while domestic tourists made 238.797 overnight stays (down 24.2%). Total tourist traffic (foreign and domestic tourists) in March amounted to 118.236 arrivals (down 74.6%) and 518.530 overnight stays (down 53.0%). In April 2020, 2.349 arrivals of foreign tourists were recorded (a decrease of 99.8%) and 7.104 arrivals of domestic guests (a decrease of 96.1%). The number of foreign tourist nights in April was 110.602 (down 96.1%), while domestic tourists made 281.026 overnight stays (down 37.9%). Total tourist traffic (foreign and domestic tourists) in April amounted to 9.453 arrivals (down 99.2%) and 391.628 overnight stays (down 88.2%). In May 2020, 44.984 arrivals of foreign tourists were recorded (a decrease of 96.8%) and 41.429 arrivals of domestic guests (a decrease of 81.7%). The number of overnight stays by foreign tourists in May was 230.665 (down 95.4%), while domestic tourists made 293.520 overnight stays (down 62.1%). Total tourist traffic (foreign and domestic tourists) in May amounted to 86.413 arrivals (down 94.8%) and 524.185 overnight stays (down 90.7%). In June 2020, 722.565 arrivals of foreign tourists were recorded (decrease of 74.7%) and 193.031 arrivals of domestic guests (decrease of 36.6%). The number of overnight stays of foreign tourists in June amounted to 3.892,768 (a decrease of 71.4%), while domestic tourists realized 970.918 overnight stays (a decrease of 35.5%). Total tourist turnover (foreign and domestic tourists) in June amounted to 915,596 arrivals (a decrease of 71.0%) and 4.863,686 overnight stays (a decrease of 67.8%).

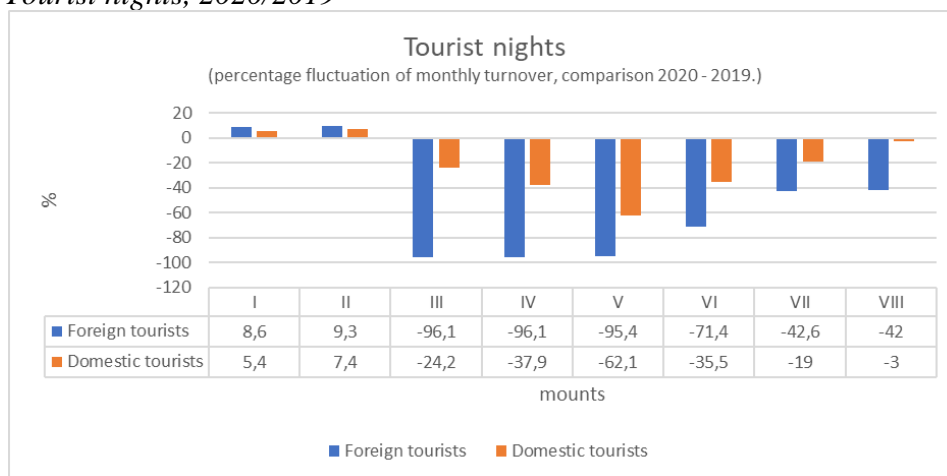
In July 2020, 2.125,026 arrivals of foreign tourists were recorded (index 49.9) and 324.927 arrivals of domestic guests (index 90.8). The number of overnight stays of foreign tourists in July was 15.694,850 (index 57.9), while domestic tourists realized 2.901,969 overnight stays (index 81.31). Total tourist turnover (foreign and domestic tourists) in July amounted to 2.449,953 arrivals (index 53.1) and 18.596,819 overnight stays (index 60.7). In August 2020, 2.227,561 arrivals of foreign tourists were recorded (index 48.55) and 450,408 arrivals of domestic guests (index 116.62). The number of overnight stays of foreign tourists in August was 17. 089,947 (index 58.93), while domestic tourists realized 3.962,138 overnight stays (index 97.00). Total tourist turnover (foreign and domestic tourists) in August amounted to 2.667,969 arrivals (index 53.84) and 21.052,085 overnight stays (index 63.63).

Figure 3: *Tourist arrivals 2020/2019*



Source: *CNTB (eVisitor data + integrated eCrew)*

Figure 4: *Tourist nights, 2020/2019*

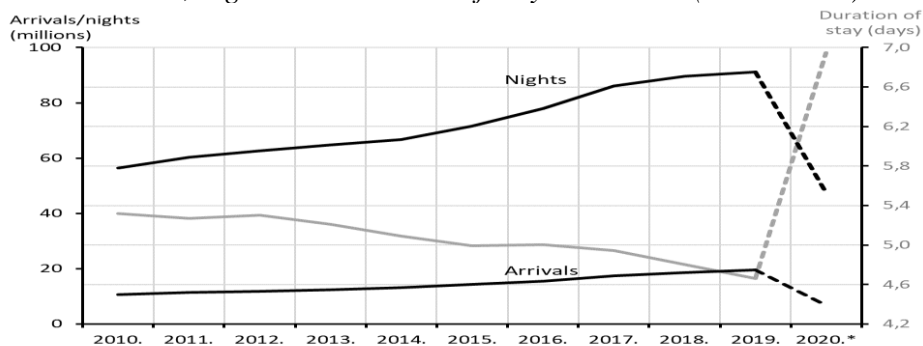


Source: *CNTB (eVisitor data + integrated eCrew)*

Average number of days of tourist stay in Croatia

The trend of reducing the average stay of tourists in Croatia from 5.3 days (2010) to 4.9 days (2019) during the season so far (January-August 2020) is completely disturbed, which means that the average tourist in 2020 stays in Croatia for 6.9 days. This can be explained by the limited movement due to the closure of international borders and the higher incidence of the disease in neighbouring tourist countries.

Figure 5: *Tourist arrivals, nights and duration of stay in Croatia (2010- 2020)*



Source: *CNTB*

In addition, in April, the CNTB recorded 9,453 tourist arrivals and 391,628 overnight stays. In other words, the average tourist spent as much as 41.4 days in Croatia that month. This illogicality was clarified in the way that it was about tourists who arrived in the chosen destination in March, however, due to the closure of borders, both state and restrictions within the country, they could not leave the place of arrival.

Market outcomes

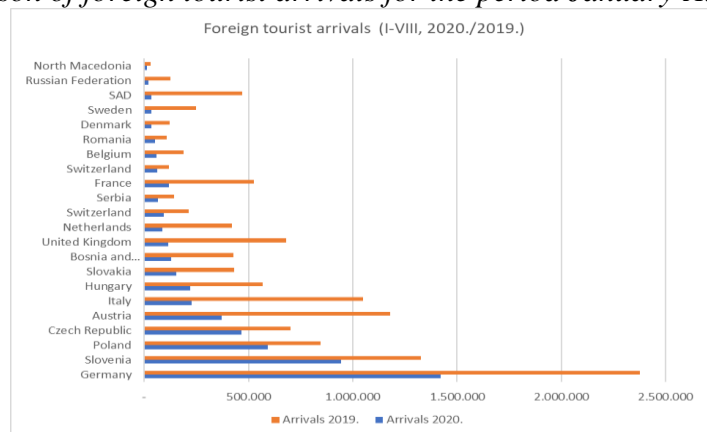
Due to the consequences of the still current global corona virus pandemic (COVID-19) and the implementation of various protectionist measures at the level of most countries in Europe and the world, Croatia recorded a decline in tourist traffic from almost all relevant markets during January-August, as shown in Table 2.

Table 2: Arrivals and overnight stays of foreign tourists by countries of affiliation for the period January - August 2020/2019 (all capacities)

Country	I-VIII 2020.			I-VIII 2019.			index 2020./2019.	
	Arrivals	Nights	% Nights	Arrivals	Nights	% Nights	Arrivals	Nights
Germany	1.420.708	11.165.356	23,49%	2.377.084	16.991.141	18,85%	59,77	65,71
Slovenia	942.814	7.641.865	16,08%	1.327.444	9.526.386	10,57%	71,02	80,22
Poland	592.680	4.026.933	8,47%	845.801	5.411.842	6,00%	70,07	74,41
Czech Republic	466.153	3.124.376	6,57%	701.138	4.688.563	5,20%	66,49	66,64
Austria	371.525	2.324.374	4,89%	1.179.284	6.313.083	7,00%	31,50	36,82
Italy	227.364	1.359.340	2,86%	1.048.312	4.936.670	5,48%	21,69	27,54
Hungary	221.745	1.279.291	2,69%	568.733	2.951.837	3,27%	38,99	43,34
Slovakia	155.213	1.071.339	2,25%	431.677	2.807.140	3,11%	35,96	38,16
Bosnia and Herzegovina	128.323	911.791	1,92%	426.502	2.392.792	2,65%	30,09	38,11
United Kingdom	114.085	606.026	1,27%	681.014	3.492.087	3,87%	16,75	17,35
Netherlands	86.109	595.574	1,25%	421.659	2.662.374	2,95%	20,42	22,37
Switzerland	92.598	547.088	1,15%	213.487	989.317	1,10%	43,37	55,30
Serbia	67.385	505.153	1,06%	142.832	981.274	1,09%	47,18	51,48
France	119.208	500.772	1,05%	525.101	1.980.875	2,20%	22,70	25,28
Switzerland	62.606	400.527	0,84%	118.078	710.251	0,79%	53,02	56,39
Belgium	59.882	334.093	0,70%	188.657	871.990	0,97%	31,74	38,31
Romania	51.651	250.475	0,53%	107.385	425.486	0,47%	48,10	58,87
Denmark	34.116	216.003	0,45%	122.525	757.988	0,84%	27,84	28,50
Sweden	33.891	183.286	0,39%	247.191	1.289.475	1,43%	13,71	14,21
SAD	34.399	165.073	0,35%	468.243	1.329.298	1,47%	7,35	12,42
Russian Federation	19.731	125.164	0,26%	123.765	815.504	0,90%	15,94	15,35
North Macedonia	11.713	103.702	0,22%	31.008	215.422	0,24%	37,77	48,14

Source: CNTB (eVisitor data + integrated eCrew)

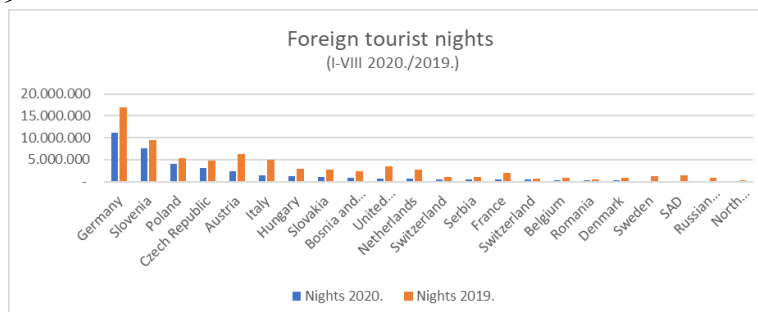
Figure 6: Comparison of foreign tourist arrivals for the period January-August 2020/2019



Source: CNTB (eVisitor data + integrated eCrew)

The total turnover in the period January-August (overnight stays) is dominated by the German market, followed by the domestic market and Slovenia, Poland, the Czech Republic and Austria.

Figure 7: Comparison of realized overnight stays of foreign tourists in the period January-August 2020/2019



Source: CNTB (eVisitor data + integrated eCrew)

Results by accommodation facilities

During the period January-August, the most of tourist traffic was registered in commercial accommodation facilities (79%), while non-commercial accommodation facilities participated in the total traffic with a share of 18%.

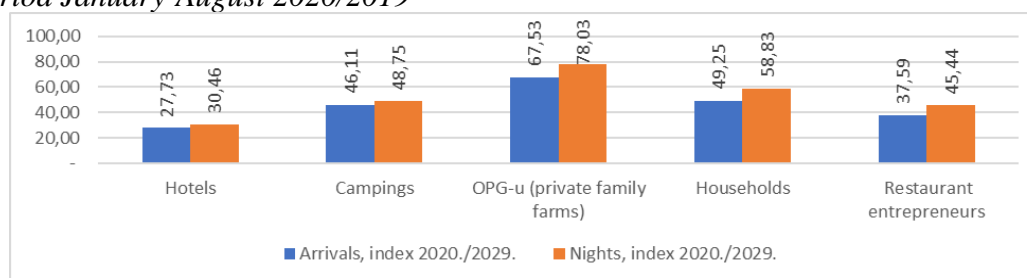
Table 3: Arrivals and overnight stays by types of facilities in which tourists stay - period January-August 2020/2019

	I-VIII 2020.			I-VIII 2019.			index 2020./2019.	
	Arrivals	Nights	% Nights	Arrivals	Nights	% Nights	Arrivals	Nights
Hotels	1.557.797	5.886.348	12,38%	5.616.783	19.327.023	21,44%	27,73	30,46
Campings	1.138.848	7.927.153	16,68%	2.469.719	16.261.317	18,04%	46,11	48,75
OPG-u (private family farms)	15.624	66.330	0,14%	23.137	85.004	0,09%	67,53	78,03
Households	2.928.252	20.295.061	42,69%	5.946.069	34.499.909	38,27%	49,25	58,83
Other catering facilities for accommodation	581.451	2.945.002	6,20%	1.547.001	6.481.762	7,19%	37,59	45,44
Restaurant	969	2.061	0,00%	3.859	7.237	0,01%	25,11	28,48
Total commercial accommodation	6.224.055	37.128.707	78,11%	15.619.261	76.734.595	85,13%	39,85	48,39
Non-commercial accommodation	431.667	9.123.613	19,19%	483.028	10.769.244	11,95%	89,37	84,72
Nautical	187.597	1.283.312	2,70%	410.215	2.638.700	2,93%	45,73	48,63
Total commercial accommodation	6.843.319	47.535.632	100,00%	16.512.504	90.142.539	100,00%	41,44	52,73

Source: CNTB (eVisitor data + integrated eCrew)

Most of the tourist traffic during the pandemic was realized in facilities on family farms (peasant households), which can be seen from table no. 3. (index 2020/2019 arrivals 67.53 and overnight stays 78.03) and household facilities (index 2020/2019 arrivals 49.25 and overnight stays 58.83) while the weakest results were achieved in the category of restaurants (index 2020/2019 arrivals 25.11 and overnight stays 28.48) and hotels (index 2020/2019 arrivals 27.73 and overnight stays 30.46).

Figure 8: *Comparative indices of tourist arrivals and overnight stays by types of facilities for the period January-August 2020/2019*



Source: *CNTB (eVisitor data + integrated eCrew)*

Organized and individual traffic

In total, 17% of tourist overnight stays in the period January - August were realized based on traffic in the organized segment, while 83% refers to individual traffic. In hotel accommodation facilities, the individual segment comprises 52%, organized 48%. For family accommodation, the share of organized overnight stays was 13%, while the share of individuals was 87%.

Methodological note: Indicators of the eVisitor system of the Croatian National Tourist Board were used as a source of data, which monitors tourist traffic in the Republic of Croatia, in accordance with applicable legislation, through registration and deregistration of tourists in commercial and non-commercial accommodation facilities. The eVisitor system indicators also include data from the eCrew system under the jurisdiction of the Ministry of the Sea, Transport and Infrastructure of the Republic of Croatia, related to tourist traffic in the nautical charter segment.

Conclusion

We are witnessing radical changes in social and economic relations due to the outbreak of a coronavirus pandemic. The crisis happened abruptly and very quickly led to global consequences whose final scale we still cannot estimate. The economies of the EU (as well as many other countries around the world) are currently in a state of shock, marked by a sharp decline in demand for goods and services and rising unemployment. Croatia is one of the seven members of the European Union with the highest risk of losing jobs in tourism, and this fate can be attributed primarily to the fact that we have remained a "summer destination" instead of being transformed towards year-round tourism. Such is at least the conclusion of a large study by the European Commission's Joint Research Center, conducted between April and June this year, whose task was to uncover all the crucial changes that have taken place in this sector due to the pandemic. To mitigate the effects that job losses in tourism could have on individual economies, the Commission's research offered several recommendations based on three potential scenarios which, given that the pandemic is not waning, could be likely to continue soon in tourism industry. The first one is optimistic - national and local measures introduced in destinations have not "finished" tourist traffic, once crowded beaches by reducing the number of tourists are even more acceptable to many than they were, and the season has been slightly extended because a good part of passengers delayed booking this year. Under this scenario, tourism turnover will decrease by an average of 38 percent, resulting in a loss of 6.6 million jobs in tourism at Union level. The figure sounds scary - but it is much more "optimistic" than the second scenario in which, thanks to increased fear of travel, tourism turnover at the EU level would be reduced by 52 percent, and as many as 9 million jobs would be lost in tourism.

The worst-case scenario - which, according to the description in the analysis, corresponds exactly to what is currently happening at Union level - envisages "the outbreak of smaller hotspots that initially seem to be under control to eventually expand into European territory and lead to new restrictive measures, such as and closing certain borders ". According to this scenario, year-on-year tourism turnover will fall by 68 percent globally at the Union level, and 11.7 million jobs will be lost in the tourism sector, representing as much as 5.6 percent of the total active population.

In addition, given that a total of 19 million workers are employed in tourism in the EU, the third scenario would mean a loss of 61.5 percent of the total share of jobs in tourism, and if we map those numbers to the domestic tourism sector, the statistics would be relentless. Domestic tourism, depending on the scenario, could lose 52-67 thousand jobs soon out of an estimated 110 thousand.

Bearing in mind that the mobility of the population, in which tourist movements play a special role, is the main cause of the rapid spread of coronavirus in the world and especially in Europe, the question arises as to what will happen to Croatian tourism in the near future. Although more accurate forecasts are very ungrateful given the many unknowns related to the spread of coronavirus, it is certain that even under the condition that the infection will decrease in the coming months, the number of tourists in Croatia will be drastically lower than in 2019 and many years before. Until an effective vaccine is found, which according to current estimates will take at least half a year, or the virus will disappear completely, which is not likely according to current knowledge, significant growth in tourism cannot be expected.

Even if there is a long-term absence of the number of newly infected with coronavirus, further preventive application of many restrictive epidemiological measures in Europe and the world is to be expected, especially those related to free movement between individual countries. It should also be borne in mind that the coronavirus pandemic has caused major shocks, a crisis in health systems and a halt in economic activity due to the high number of deaths in many countries. This means that even if the movement resumes soon, many people will not be able to take tourist trips, and those who are afraid of the possible re-spread of the virus and the deterioration of their property will be primarily oriented to travel in their own country or possibly the nearest neighborhood. (Klarić, 2020)

In this context, Croatia is on the one hand at a disadvantage due to low domestic demand, but on the other hand it has an advantage due to its location close to the main European markets easily accessible by car. Namely, it is to be expected that air transport will be exposed to numerous restrictions, given the risks of the spread of the virus in airports and within aircraft, as well as restrictions on movement between individual countries. (Klarić, 2020). In this sense, domestic tourism experts note that due to the extremely weak tourist product before and after the season, Croatia has insufficient traffic in the period of eight months a year and above-average intensive tourist traffic in the four summer months. So we are actually talking about hypertourism in the season and insufficient tourism in the pre- and post-season, which leads us to the conclusion that Croatia needs a strong turn, through a completely new philosophy of tourism, or a new value system that would focus primarily on quality and strong development of new product.

That hypertourism in three summer months really exists is proved by the statistical data presented in this paper; 86 percent of overnight stays are concentrated in three months, almost exclusively in coastal destinations, and indicators of the density and intensity of tourism

development indicate excessive saturation. Since saturation and volume growth are not accompanied by price and revenue growth, the question of the relationship between the benefits and costs of tourism for the future arises. Overnight stays in Croatia, namely, have a low level of added value, we generate too little income per night and for years we have recorded a declining trend in the wave of free swimming in the sea and cheap private accommodation. That is why it is dangerous to blindly count tourist volumes, given that we could replace the lost nights of mass tourism of low added value with nights of high added value and thus significantly improve all key indicators of tourism success.

Among other things, the road lies in the already mentioned hundreds of times abolishing the seasonality of tourism through the creation of new facilities, reducing the share of private accommodation and its transformation into small family hotels, development of continental tourism, transformation of tourist systems, all with minimal risks to tourists population and especially employees in the tourism sector (Kovač et al., 2017).

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