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Факултет за туризам и бизнис логистика

Goce Delchev University Shtip

Faculty of Tourism and Business Logistics

Четврта Меѓународна Научна Конференција

Fourth International Scientific Conference

ПРЕДИЗВИЦИТЕ ВО ТУРИЗМОТ И БИЗНИС ЛОГИСТИКАТА ВО 21 ВЕК

CHALLENGES OF TOURISM AND BUSINESS LOGISTICS IN THE 21ST CENTURY

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Пленарна сесија
Социо-економски импликации на КОВИД-19: намалување на разликите и справување со дистрибутивните влијанија во различни сектори

Претседавач на сесијата: Татјана Бошков, вон. професор и декан на Факултетот за туризам и бизнис логистика, Универзитет „Гоце Делчев“ – Штип, РС Македонија.

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д-р Татјана Бошков, вон. професор и декан на Факултет за туризам и бизнис логистика, Универзитет „Гоце Делчев“ – Штип, РС Македонија.

Втора сесија: Туризам, угостителство и гастрономија
д-р Наташа Митева, доцент и продекан за настава, Факултет за туризам и бизнис логистика, Универзитет „Гоце Делчев“ – Штип, РС Македонија.

Panel session
Socio-economic implications of COVID-19: reducing disparities and addressing distributional impacts in different sectors

Session chair: Tatjana Boshkov, Assoc.professor and Dean at Faculty of tourism and business logistics, ,,Goce Delcev University – Stip, N. Macedonia

Panelists

1. Gligor Bishev, University professor and Management Board Chairman, Sparkasse Bank, N. Macedonia
2. Zarko Radjenovic, PhD, Research Associate, Innovation Center, University of Nis, Serbia
3. Natasha Miteva, PhD, Vice-Dean for Education, Faculty of Tourism and Business Logistics, Goce Delcev University – Stip, N. Macedonia

Moderators

First session: Business logistics and business administration
Tatjana Boshkov, PhD, Dean at Faculty of Tourism and Business Logistics, Goce Delcev University – Stip, N. Macedonia

Second session: Tourism, hospitality and gastronomy
Natasha Miteva, PhD, Vice-Dean for Education, Faculty of Tourism and Business Logistics, Goce Delcev University – Stip, N. Macedonia

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ФАКУЛТЕТ ЗА ТУРИЗАМ И БИЗНИС ЛОГИСТИКА

FACULTY OF TOURISM AND BUSINESS LOGISTICS

ЧЕТВРТА МЕЃУНАРОДНА НАУЧНА КОНФЕРЕНЦИЈА

FOURTH INTERNATIONAL SCIENTIFIC CONFERENCE

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THE IMPACT OF CRISIS ON THE SEASONALITY OF CROATIAN TOURISM AFTER 2000

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Abstract

As one of the long-term problems in the development of (Croatian) tourism, the issue of seasonality has long been recognized. Directly to the financial crisis of 2008, i.e. the actual health crisis caused by the novel coronavirus, Croatia was recording a declining trend in the seasonality of tourist overnight stays. However, the crises also affected the tourism market and reversed the previous positive trends. The Gini coefficient of concentration of overnight stays in commercial accommodation in Croatia increased from 0.69 (2008) to 0.71 (2010) due to the financial crisis of 2008, i. e. from 0.67 (2019) to a whopping 0.79 (2020) due to the current health crisis. This paper presents the problem of seasonality in Croatian counties, but also regarding the most important emitting areas from which foreign tourists come to Croatia. Tourism regions and tourists whose seasonality was highly affected with crisis were highlighted. Also, guidelines for dealing with the presented problem were proposed.

***Keywords**: tourism, seasonality, Croatia, crisis*

Introduction: Seasonality as a structural problem of the tourism sector

Tourism seasonality implies a concentration of tourism demand (number of tourist arrivals and overnight stays)[1] in a relatively short period, usually within the summer months (Fernandez-Morales & Cisneros-Martinez, 2019). Many authors see this phenomenon not only as one of the most recognizable features of mass tourism (Androitis, 2005; Duro, 2018; Chen et al., 2019; Vergori & Arima, 2020), but as a structural problem that is extremely difficult to change (Fernandez-Morales & Mayorga-Toledano, 2008; Vergori, 2012). Therefore, it is not surprising that seasonality occupies scientific research attention. However, only a few authors have dealt with the impact of crises on the seasonality of tourism demand (Kožić et al., 2013; Duro, 2018), and even they did it incidentally. Hence, the aim of this research is to consider the impact of the financial crisis of 2008 and the current crisis caused by the novel coronavirus on tourism demand in Croatia. We will explain the phenomenon of seasonality with regard to tourism regions within the country, as well as regarding the most important emitting markets. Seasonality is influenced by natural and social factors. Physical characteristics of climate, namely changes of seasons and weather conditions, are the most important natural factors (Androitis, 2005; Fernandez-Morales & Mayorga-Toledano, 2008).[2] Social factors are mainly related to the calendar (schedule of national, school and/or religious holidays), distribution of annual leave of absence, but

[1] Song & Li (2010) discuss the most appropriate indicator to measure tourism demand. They put emphasis on tourist arrivals, tourist overnight stays and the expenditure that tourists make in the destination. Because of the limited statistical data, researchers usually must decide between the number of tourist arrivals and the number of tourist overnight stays. We argue that tourist overnight stays are better indicator since one tourist can make more tourist arrivals a day (in several destinations), but only one overnight stay (Curić et al., 2013).

[2] Since the beginning of modern tourism development is associated with the tourists stay in the Mediterranean during the winter (Curić et al., 2013), the change of seasons should not necessarily be a limiting factor.

tradition as well (Verga & Arima, 2020). For example, a good part of population does not have to use their leave of absence in summer, but does it, because they have always done it (Androitis, 2005). In addition, the seasonality of the tourism destination is also influenced by the tourism promotion (Kulendran & Wong, 2005). Therefore, space to reduce seasonality should be sought in the social factors that influence this phenomenon.

Seasonality of tourism demand, namely, has mostly negative consequences for the tourism destination. They are visible both from the aspect of environmental degradation and from the aspect of reducing the quality of life of the local population (Chen et al., 2019). Seasonality of tourist arrivals usually means higher prices of goods and services (Vergori, 2012; Vergori & Arima, 2020). Overloading of accommodation facilities is a common occurrence, as well as huge pressure on the communal infrastructure (electricity network, water supply, waste disposal problems) (Androitis, 2005; Kulendran & Wong, 2005; Chen et al., 2019). Traffic jam and lack of parking spaces should also be considered (Vergori, 2012). Furthermore, there is a problem of shortage of (competent) labour force (Androitis, 2005; Fernandez-Morales & Mayorga-Toledano, 2008). Temporary seasonal employment can be particularly problematic in areas where tourism is competitive with other activities, usually with agriculture (Vergori, 2012; Vergori & Arima, 2020). The consequences of seasonality are also felt by other branches of the economy related to tourism (Kulendran & Wong, 2005; Chen et al., 2019), of which retail, catering, communications and the food industry are only the most obvious.

Review of previous research

As a result of the general opinion that seasonality is an almost unchangeable feature of modern tourism, research on this phenomenon is not numerous compared to the great scientific interest that has been realized in tourism research in general (Fernandez-Morales & Mayorga-Toledano, 2008). In one of the earlier papers dealing with the seasonality of tourism demand, Koenig and Bischoff (2003) compare the concentration of tourist arrivals in Wales with the rest of the United Kingdom. Similarly, Kožić (2013) confirmed the worrying assumption that seasonality in Croatia is relatively high compared to the rest of the Mediterranean countries. Furthermore, Kožić et al. (2013) analysed the seasonality of tourism in Croatia during 2000s with respect to emitting markets, tourism regions and type of the accommodation capacities. Fernandez-Morales & Mayorga-Toledano (2008) point out that Costa del Sol has shown an almost constant seasonality of tourist arrivals for years, but they also identify differences relating to emitting markets. Kulendran & Wong (2005) explored differences in seasonality regarding the different form of tourism, concluding that it is least pronounced in the case of business tourism. Vergori & Arima (2020) argue that the type of transport which tourists use to reach destination is also related to seasonality. They point out that deregulation of air transport significantly affected increase in tourist arrivals, but also reduced the seasonality of tourism demand in Italy. Fernandez-Morales & Cisneros-Martinez (2019) examined tourism demand generated by cruisers in the Mediterranean. They showed that seaports in the western Mediterranean have less pronounced seasonality, while Black Sea and Adriatic ports record the highest value of tourism seasonality.

Research questions and hypotheses

Drawing on previous research that has outlined the fundamental factors of tourism seasonality, but also the consequences that seasonality has for the economy of the receptive market, we will formulate the starting problem of our research. It consists in the fact that crises undoubtedly affect the seasonality of tourism demand and that they entail different consequences for emitting and receptive tourism areas. We will investigate how the crisis situations in the past 20 years have reflected on the seasonality of tourism demand in Croatia, then on the seasonality of the key emitting markets for Croatian tourism, and finally, on the seasonality of tourism regions within Croatia. Assuming that insecurity is recognized as greatest threat to modern tourism (Curić et al., 2013), but also because of the limited spatial movement during to the coronavirus pandemic, the current health crisis will certainly have the greatest impact on seasonality changes. Therefore, we assume that emitting markets that have successfully dealt with

coronavirus disease, i.e., countries whose governments have not adopted too rigorous measures to combat the pandemic, will record a smaller increase in seasonality than others. Tourism regions in Croatia are difficult to compare considering the huge differences in the number of tourist arrivals. Since the tourism demand in continental counties is significantly lower, we expect higher growth of seasonality in continental than in Adriatic Croatia.

Methodology

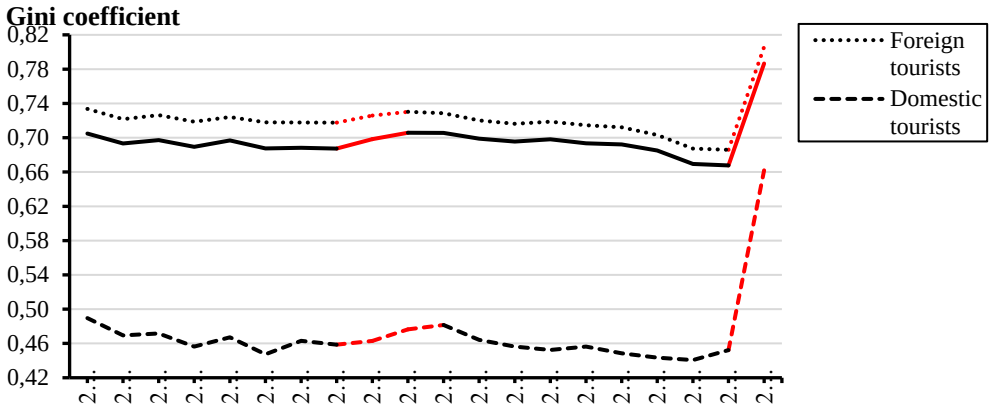
In research on the seasonality of tourism, scientists have used several research methods and techniques, and various statistical measures of concentration.[3] However, the Gini coefficient was used most often (Koenig & Bischoff, 2003; Kuledran & Wong, 2005; Fernandez-Morales & Mayorga-Toledano, 2008; Kožić, Krešić & Boranič Živoder, 2013). The Gini coefficient is an indicator that was initially designed to show economic inequality, but since the 2000s it has also been used in the tourism sector (Fernandez-Morales & Mayorga-Toledano, 2008). It is a relative measure of concentration whose value ranges between 0 (the distribution of tourist arrivals / overnight stays is constant during the year) and 1 (the distribution of tourism demand is extremely irregular) (Kovačić et al., 2013). The most prominent advantages of this indicator are the facts that it considers the distortion of the distribution and that is not too sensitive to extreme values (Fernandez-Morales & Cisneros-Martinez, 2019). To make our results comparable to the others, we used the Gini coefficient as an appropriate measure of the concentration of tourism demand as well. Based on the data of Croatian Bureau of Statistics on the realized overnight stays of domestic and foreign tourists in commercial accommodation in Croatia from 2001 to 2020, the trend of the Gini coefficient was calculated. In the further analysis, we considered only the largest emitting markets, namely those whose citizens realized more than a million overnight stays in Croatia in year 2019. The seasonality of tourist overnight stays in the pre-crisis and (post)crisis years was compared to determine the existence of differences in the patterns of tourist activity. Finally, regarding the severity of the seasonality problem, emitting markets and tourism regions in Croatia have been singled out, because different degrees of seasonality require different approaches in managing existing and planning a new tourism product.

Seasonality of tourist overnight stays in Croatia after 2000
The impact of crisis situations on the growth of seasonality

The growth of seasonality of tourism demand due to the financial crisis of 2008 has already been documented on the examples of Croatia (Kožić et al., 2013) and Spain (Duro, 2018). Here it will be further emphasized. The growth of seasonality in crisis situations was higher and lasted longer in the domestic tourism market (Fig. 1). However, the fact that foreign guests still account for the majority of tourists in Croatia, proved to be a mitigating circumstance for the tourism sector in crisis situations in general.

Fig. 1. Seasonality of tourist overnight stays in Croatia (2001-2020)

[3] More in Koenig & Bischoff (2003).



Source: DZS, 2021

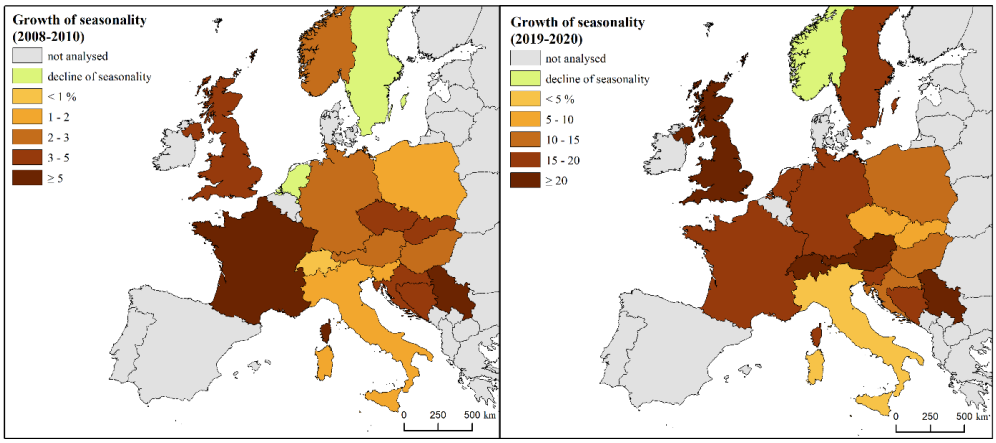
Assumed growth of seasonality due to the European migration crisis of 2015 did not affect Croatia, probably since Croatia was largely off the main migration routes, as well as simply because it was not perceived as a desirable destination for migrants. Therefore, the changes in seasonality associated with the migration crisis will not be further analysed.

Quite expectedly and in line with the presumption, a large growth of the tourism seasonality occurred during the health crisis caused by coronavirus disease in 2020. Although there has been a dramatical increase in the concentration of tourist overnight stays in the summer months (Fig. 1), we believe 2021 will show a reversal in the seasonality of tourism demand due to increasingly successful coping with coronavirus disease and less and less restrictions in the spatial movement of the population of emitting markets. As in the case of the financial crisis of 2008, it was again proved that the crisis has a much stronger effect on domestic tourists, so the increase in the seasonality of their tourist overnight stays proved to be higher than in the case of foreign guests. The restrictive policy of population spatial mobility within the country has certainly contributed to that growth. Since measures to combat coronavirus disease differed in the most important emitting areas for Croatian tourism, the great diversification of tourist arrivals regarding the country of origin contributed to a slightly lower growth of seasonality among foreign guests.

Seasonality with regard to emitting tourism areas

Parsing the seasonality of tourism demand of foreign guests into individual emitting markets proved to be an effective way of establishing more efficient promotion strategies (Duro, 2018). In the case of interdependence of crisis situations, fragility of the tourism sector and seasonality, such segmentation seems useful for understanding specific patterns of tourist behaviour. Croatian tourism recorded a record high demand in 2019. At that time, the lowest values of the Gini coefficient for tourist overnight stays (< 0.6) were achieved by domestic tourists and guests from neighboring BiH and Serbia. Slightly higher seasonality was recorded by tourists from Western Europe (0.6 - 0.7), while the highest value of the Gini coefficient (≥ 7) was reached by guests from post-socialist countries, as well as by tourists from the Netherlands, Norway and Italy.

Fig. 2. Growth of seasonality (Gini coefficient) of tourist overnight stays in Croatia regarding the largest European emitting markets during the financial crisis of 2008 (left) and corona crisis (right)



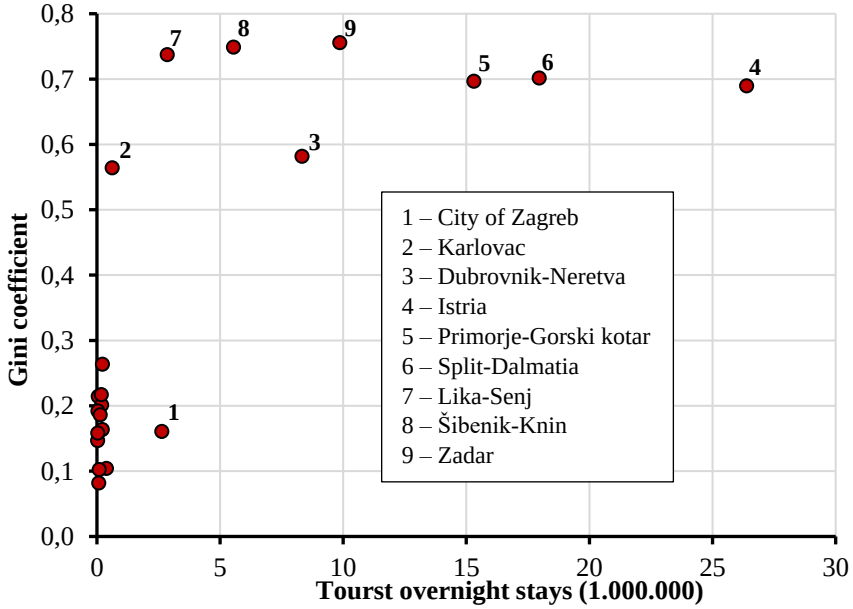
Source: DZS, 2021

Changes of seasonality of tourist overnight stays during the financial crisis of 2008 nor corona crisis (Fig. 2) was not observed according to the spatial pattern explained above. Moreover, there has been a kind of anomaly, so precisely in those periods certain markets recorded a decrease of seasonality (Sweden, the Netherlands, Norway), albeit with a significant decrease in tourist overnight stays as well. It can only be argued that higher seasonality in the pre-crisis period means a smaller increase in seasonality during the crisis period, and vice versa

Regional differences in the seasonality of tourist overnight stays in Croatia

The tourism industry is incomparably more developed in Adriatic part of Croatia than in the continental part. Therefore, it should come as no surprise that there is a large difference in the tourism seasonality of these two regions. It turned out that the greater intensity of tourism demand resulted with a higher degree of seasonality (Fig. 3). The exception is the City of Zagreb, which stands out with a relatively high number of tourist overnight stays, and a relatively low value of Gini coefficient. As the capital and the leading transit point of Croatia, it manages to achieve a relatively constant tourism demand during the year.

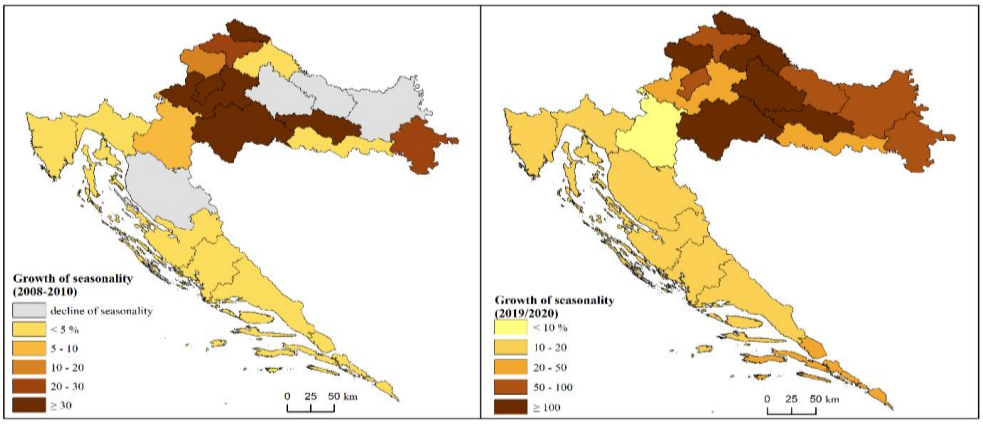
Fig. 3. Interdependence between the Gini coefficient and the total number of tourist overnight stays in Croatian counties (2019)



Source: DZS, 2021

Like the case of the most important emitting markets for Croatian tourism, the rule that a low level of pre-crisis seasonality (Fig. 3) results in a higher growth of seasonality during the crisis also applies to Croatian counties. The rule was not fully confirmed during the financial crisis of 2008, but it was proven completely in the current corona crisis (Fig. 4).

Fig. 4. Growth of seasonality (Gini coefficient) of tourist overnight stays in Croatia regarding the Croatian counties during the financial crisis of 2008 (left) and corona crisis (right)



Source: DZS, 2021

How to reduce the problem of seasonality?

Complete elimination of the tourism demand seasonality is not likely due to the climatological conditions of the destination which, in temperate latitudes, imply a change of seasons (Vergori, 2012). However, that does not mean that the existing problem cannot be reduced. Thus Fernandez-Morales & Cisneros-Martinez (2019) argue that cruises have a good chance of coping with natural features since mobility is their intrinsic feature. Furthermore, Kulendran & Wong (2005) proved that the distribution of tourist overnight stays within business form of tourism is relatively constant during the year. Moreover, the reinforcement and development of other selective forms of tourism are proving to be a potential solution for high seasonality. Croatia certainly has the potential for the development of health, nautical, cultural, religious, enogastronomic, as well as other selective forms of tourism. Diversification of the tourism product, namely, is one of the most used measures to mitigate seasonality. Other measures include the organization of events and festivals outside the main tourism season, diversification of the emitting market, incentive prices[4] and tax policy, as well as the requirement to offer a unique tourism product (Androitis, 2005; Vergori & Arima, 2020).

Investing in air transport has also proved useful in reducing seasonality, with the rule that a lower travel price means a more attractive destination (Vergori & Arima, 2020). The calendar also plays a significant role in the annual distribution of tourism demand. For example, by changing the terms of public holidays or by dividing school holidays into smaller units, the patterns of tourist behaviour would also change (Vergori, 2012). Therefore, regarding the possibility of more even distribution of domestic tourist overnight stays in Croatia, the formation of autumn school holidays, as well as the splitting of winter holidays into two smaller parts should be positive change (Košar, 2019). Also, the change of date of Statehood Day from June 25 to May 30, as well as the proclamation of Homeland War Remembrance Day on November 18 as a new non-working day (Zakon o blagdanima, 2020), should have a positive impact on increasing domestic tourism demand before and after main tourism season.

Conclusion

[4] Some believe that reducing prices outside the main season damages the reputation of the tourism destination and that such policy is not desirable (Androitis, 2005).

It is known that crisis situations have a negative impact on tourism demand, and this paper found that they significantly affect the annual concentration of tourist overnight stays as well. After Croatia recorded a declining seasonality in early 2000s, the financial crisis of 2008 shifted that trend. The corona crisis has increased the seasonality of tourism demand even more. It has been found that domestic tourists are much more affected by crisis situations. The increase in the seasonality of tourist overnight stays is smaller in the case of foreign guests, primarily due to the increasing diversification of emitting tourism markets, as well as different socio-economic conditions. Besides that, no significant spatial regularity was observed regarding the foreign tourist's growth of seasonality of overnight stays. However, it has been shown that higher pre-crisis seasonality of tourism demand results in smaller growth of seasonality during the crisis period. That rule, with certain exceptions, applies to emitting markets of foreign tourists, as well as to particular counties and tourism regions within Croatia.

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