

## Trends and Recent Development of Tourism in Istria

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Prior to the fall of the Iron Curtain, the Northern Adriatic, a space then shared by Yugoslavia and Italy, made headlines in European geopolitics and economy due to the new nation-states' border issues. In the post-WW2 era, it sparked conflicts followed by co-operation between communist and democratic societies, became the chief economic gateway of East-Central Europe through the large inland ports (Trieste, Koper, Rijeka), and became a major Mediterranean tourist destination with numerous resorts. It was simultaneously a manufacturing site, trans-shipment area and tourist destination. In the second half of the 20<sup>th</sup> century, the growth of tourism set new goals for the region. Instead of competition and rivalry, complementarities, and natural and cultural protection on regional and nation-state levels were sought. In this paper, the structure and problems of tourism development in selected areas of the Northern Adriatic region, in particular the Istrian Peninsula, driven by market economy forces, will be discussed. Istria has a long history as a desired leisure destination. In the 19<sup>th</sup> and the early 20<sup>th</sup> centuries, nobility and intellectuals became acquainted with the geography of the peninsula, its Austrian and Venetian heritage, and its multi-national Romance, Slavic and Germanic environments. At the dawn of the 21<sup>st</sup> century, the development of tourism, tourist visits, and their impact on societies and cultural landscapes can be compared to those Costa Brava and other tourist areas of the Mediterranean.

**Keywords:** Istria, Adriatic Sea, Slovenia, Croatia, Italy, History of Tourism, Tourism Development, Tourism Strategies.

### Introduction

#### Contemporary Geography of the Northern Adriatic

The Northern Adriatic is most often identified with the Italian provinces of Friuli Venetia-Giulia (26,209 km<sup>2</sup>), the Slovenian littoral region of Primorska (3,369 km<sup>2</sup>) and the northern Croatian littoral, i.e. Istria and the Kvarner (5,650 km<sup>2</sup>). The region is part of the Mediterranean basin stretching on the eastern, northern, and western sides of the Venetian Bay of the Adriatic Sea. The length of the coast is dominated by Croatia (539 km, incl. islands), followed by both provinces in Italy (326 km) and Slovenia (46 km). In the north, the coastal lowlands and karstic upland plains are embraced by the Southern Alps (the Dolomites and the Julian Alps), with famous winter sport resorts such as Cortina d'Ampezzo, Tarvisio,

Kranjska gora and Bovec, matched by the many littoral tourist centers, spread along the coast from Venice and the Venetian Lido in the south-west, to Grado, Portorož and Poreč in the north, and Opatija and Crikvenica in the south-east of the Venetian Bay.

The western coastline of the Venetian Bay is characterized by sandy beaches and drained marshes, while the eastern coast includes high limestone cliffs and descending into karstic plains and hills in the westerly direction. Water resources are dependent on the melting of the alpine glaciers in the west (Soča-Isonzo, Tagliamento, Piave) and to water levels of the mostly underground rivers and karstic lakes in the east. Strong north-easterly winds (*bora*) have, along with the cultural tradition, had an impact the built environment (stone roofs), and resulted in a

unique culinary specialty (wind-dried ham). Shipping and tourism bring major revenues to the region. The Italian region of Veneto and the municipality of Venice lead in tourism visits (9.5 million visitors annually, 65%); the County of Istria (2.6 million, 17.8%), with its leading tourist municipality of Poreč, follows in significance. Other areas of the region, such as Italy's Friuli-Venetia Giulia (1.8 million, 12.3%) and Slovenia's Primorska (0.7 million, 0.5%) show a smaller number of visitors. Compared to other regions, the Northern Adriatic (14.6 million visitors annually) ranks among the most visited of the European Mediterranean.

Istria is the major peninsula of the Northern Adriatic and the Adriatic Sea. The size of the peninsula is approximately 3,560 km<sup>2</sup>, of which 2820 km<sup>2</sup> (79.2%) are within the borders of Croatia; the Slovenian part of the peninsula encompasses 349 km<sup>2</sup> (9.8%) and the Italian part 391 km<sup>2</sup> (10.9%). The highest peak of the region is the Mount Učka in Croatia (in Italian: Monte Maggiore) with a peak at 1,396 m above sea level, located in the most easterly part of the peninsula. The karstic plains and coastal ridges support farming, which is currently leaning towards typical crops of the Mediterranean (wine, olives) at the expense of traditional grain production. The consumers of agricultural products are, to a high extent, regional tourist enterprises: hotels and restaurants. The Istrian coast has four major urban areas, consisting of ports where manufacturing and shipping takes place: Trieste in Italy (annual cargo tonnage (ACT): 37.4 million), Koper in Slovenia (ACT: 15.7 million) and Rijeka (ACT: 10.2 million) and Pula (ACT: 2.7 million). Trieste and Koper are cruise ship ports of call (each with ca. 110,000 passengers/annum), and Rijeka is the gateway for ferry-ships linking numerous Croatia islands (79 larger one and around 525 smaller) with the mainland (2,500,000 passengers in a year).

#### Brief History of the Northern Adriatic

Istria has experienced several turning points in its history. The Venetian Republic, which controlled much of the Northern Adriatic for almost six centuries, was conquered by Napoleon in 1797. After his final defeat in 1814, Austrian Istria became a Habsburg/Austrian province. The Romance population remained the dominant ethnic group in the

coastal towns, whereas the hinterland was largely in Slavic (Croatian and Slovenian) hands. The major city, the port of Trieste, had an even greater mix of nationalities with Austrian, other south-Slavic and Jewish populations have added to the ethnic mix. The Italian irredentist movement opted for the inclusion of this Austrian territory into the Italian state long before WW1. At the turn of the 20<sup>th</sup> century, the region experienced the first of numerous leisure-oriented visits and the construction of suitable infrastructure for these activities.

The defeat of the Habsburg Empire in 1918 and the Italo-Yugoslav agreement (Rapallo, 1921) turned the peninsula over to Italian hands for more 25 years. After WW2, the victorious Yugoslav communist partisans forced the re-negotiation of the post-WW1 border. In 1947, Winston Churchill's Szczecin-Trieste definition of the Iron Curtain capped the process of spatial and political fragmentation. The following 1954 London agreement placed, after several provisional solutions, the port of Trieste and the immediate hinterland within the state of Italy, whereas the rest of Istria was transferred to the communist regime of the Yugoslav socialist republics of Slovenia and Croatia. The early hard-line Yugoslav socialism was the motivation for one hundred thousand Italian nationals to migrate to their motherland. Later (Udine, 1955), the border between the two states (Italy and Yugoslavia) became one of the most open borders between states of democratic and communist ideologies.

The old Austrian infrastructure in tourism started to be re-used for its initial purpose around 1960, and new tourism projects were commenced. Two decades later, Yugoslavia was among the ten most visited countries of Europe by foreign tourists. Within Yugoslavia, the most beloved region for visits became Istria, since, in the era of early motorization, the Mediterranean region of the Northern Adriatic was in proximity to the German and Italian touristic markets. The disintegration of Yugoslavia, induced partly by political, ethnic and economic disagreements, in 1991 and later, affected Istrian tourism in both of the newly democratic and sovereign nation-states of Slovenia and Croatia. Now, at the dawn of the 21<sup>st</sup> century, as the post-WW2 and other disputes have been replaced via the European Union political framework (Italy, Slovenia and Croatia

are EU members), cooperation in tourism again has a brighter vision. With regard to natural and cultural heritage sites registered by the UNESCO, Croatia is among the richest countries of the Northern Adriatic. Slovenia's uniqueness lies in its diverse natural environments that within short distances or each other.

### The History of Tourism in Istria

Tourism on the Istrian Peninsula has a long tradition. Regarding development, Istria can be compared with the Ligurian and French Riviera, but with regards to recent trends and visits, a comparison with Costa Brava in Spain would be more appropriate. By 1845, the prominent Istrian tourist resort of Poreč offered a well-organized tourist guide service. In 1883, Opatija (German: Abbazia) was the second most visited resort (from among 195) within the Austro-Hungarian Empire; only the casino and spa resort of Karlovy Vary (German: Karlsbad) reported more visitors. In 1912, when Thomas Mann visited Istria, 114,162 visitors were registered in 19 Istrian tourist resorts. In 1938, the Italian region of Istria had 129,838 foreign visitors. Before the collapse of the Yugoslav multi-ethnic federation, Istria was visited by four million tourists, mostly German nationals (40%), followed by Italian, Austrian and British nationals (Blažević, 1996).

### Initiation of Tourism

Leisure in Istria was at first most popular among the nobility. In Opatija, visits by the Habsburgs, in particular by Kaiser Franz Joseph and his family, predated leisure stays by the Romanian King Carol, the German Kaiser Wilhelm II, the Swedish King Oscar, and many others. The aristocratic trendsetters initiated a way of life that also became popular among intellectuals and the newly rich. Poets including Rainer Maria Rilke and Lord Byron and Nobel Prize winners Thomas Mann and Robert Koch frequently visited Istrian localities. In terms of the turn-of-the-century trends, winters and spring visits were more appreciated than the current summer visits to the Mediterranean.

Tourism, as it is known today, was introduced by railways. Due to the construction of three railway lines, the Istrian peninsula became connected to the rest of Europe by easy and inexpensive transportation. The central Trieste-Pula (Pola) Istrian rail

line, connecting the naval port of Austria to its hinterland, was predominantly of strategic importance, whereas railways in the east and west served tourists. The owner of the Vienna-Trieste "Die Südbahn" constructed a side-line from Pivka (St. Peter im Karst) to the harbor of Rijeka serving the interest of tourists keen on visiting Opatija and the Südbahn's luxurious hotel Kvarner on the eastern shores of Istria. Along the western coast of the peninsula, the Trieste-Poreč (Italian: Parenzo) line was constructed. Investments were also made by state institutions of Austria (e.g. Hotel Palace, Portorož) and travel and insurance companies, such as the Lloyd Triestino (e.g. Hotel Riviera, Poreč) (Blažević, 1987).

In his novel "Death in Venice", 1929 literature Nobel Prize winner Thomas Mann described the central character's turn of the century pleasure-journey, around 1910, from Trieste, along Istria's coast, to the islands of Brioni, Pola and further on to Venice:

[...] And one day between the middle and the end of May he took the evening train for Trieste, where he stopped only twenty-four hours, embarking for Pola the next morning ... What he sought was a fresh scene, without associations, which should yet be not too out-of-the-way; and accordingly he chose an island in the Adriatic, not far of the Istrian coast. It had been well known some years, for its splendidly rugged cliff formations on the side next the open sea, and its population, clad in a bright flutter of rags and speaking an outlandish tongue. But there was rain and heavy air; the society at the hotel was provincial Austrian, and limited; besides, it annoyed him not to be able to get at the sea – he missed the close and soothing contact which only a gentle sandy slope affords... He made all haste to correct it, announcing his departure at once. Ten days after his arrival on the island a swift motor-boat bore him and his luggage in the misty dawning back across the water to the naval station of Pola, where he landed only to pass over the landing-stage and on to the decks of a ship lying there with steam up for the passage to Venice. [...] (Mann, 1995, p. 10).

After WW1, investment in tourism and tourism growth contracted, inducing competition among the

regions within Italy. Equally significantly, a steeply declining trend can be observed in the first two decades following WW2. The communist regime (of Yugoslavia) looked upon tourism as a remnant of the bourgeois pre-war period and hindered the attempts of local communities in Istria to make a profit out of it. Instead, industrial development and mining was heavily subsidized. Many hotels became welfare housing units, enabling inland worker families to spend a week or two at the Adriatic coast to almost no cost. As in Spain under Generalissimo Franco, in Yugoslavia, under Josip Broz-Tito, the 1960s saw the initiation of several new developments in tourism. As a leading member of the non-allied movement, Yugoslavia gained the almost unrestricted support of the UN (United Nations) because the country declared its intentions to go forward with plans to (re)construct the tourism industry. UN know-how was used in several development projects ("The Upper Adriatic"; "The Southern Adriatic"). The World Bank provided financial arrangements (Jordan, 1997). These changes substantially affected Istria.

#### Towards Sun, Sea and Sand Tourism Destination

In the mid-1980s, Istria had an average of 30 million bed-nights a year, thus becoming (together with the Mediterranean coasts of Spain) one of the most popular Sun, Sea and Sand destinations of the Mediterranean. The contemporary image of Istria as a Sun, Sea and Sand Mediterranean destination was established by 1975, being the primary results of the construction of mega-hotels and resorts in Portorož (St. Bernardin), in Poreč (Plava laguna, Zelena laguna), Umag (Polynesia), Pula (Veruda), Vrsar (Anita) and Rabac in the 1960s and 1970s. The construction mostly affected the western shores of the Istrian peninsula. Opatija, once the leading tourist destination in Istria, has fallen far behind in investments and visits. Poreč, with close to 9 million bed-nights a year, became the leader of the Istrian resorts in 1985. In contrast, Opatija's 2.5 million a year bed-nights placed the once leading resort well below the Istrian and Mediterranean average (Gosar, 2001).

*Table 1* Number of tourist Beds in Slovene and Croatian Istria in Relation to the National Level (in Thousands)

REGION	2012		2010		2005		1995		1985	
	All	In hotels	All	In hotels	All	In hotels	All	In hotels	All	In hotels
Coast and the Karst*	26	10	25	11	22	12	22	10	27	8
Other Slovenia	96	39	93	37	57	24	51	19	56	22
SLOVENIA	122	49	118	48	79	36	73	29	83	30
County of Istria	245	/	246	/	230	88	215	74	235	92
Other coastal counties**	603	/	632	/	218	119	170	115	320	161
Other Croatia	32	/	32	/	243	18	224	17	265	38
CROATIA	880	/	909	/	691	225	609	206	820	291

Source: Croatian Bureau of Statistics, 2014; Statistical Office of the Republic of Slovenia, 2014.  
/ Not specified

\* Includes municipalities Divača, Hrpelje-Kozina, Izola, Komen, Koper, Piran, Sežana.

\*\* Includes counties Primorje-Gorski kotar, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia, Dubrovnik-Neretva.

Table 2 Tourist Arrivals in Croatian and Slovene Istria in Relation to the National Level (in Thousands)

REGION	2012		2010		2005		1995		1985	
	All	Foreign	All	Foreign	All	Foreign	All	Foreign	All	Foreign
Coast and the Karst*	657	399	614	348	516	271	405	188	537	294
Other Slovenia	2640	1756	2392	1521	1441	818	1171	544	2216	762
SLOVENIA	3297	2155	3006	1869	1957	1089	1576	732	2753	1056
County of Istria	2985	2819	2628	2467	2162	2016	893	685	2325	1464
Other coastal counties**	7508	6647	6781	5896	3937	3268	1061	466	5587	3283
Other Croatia	1342	903	1195	748	1037	547	484	173	2213	812
CROATIA	11835	10369	10604	9111	7136	5831	2438	1324	10125	5556

Source: Croatian Bureau of Statistics, 2014; Statistical Office of the Republic of Slovenia, 2014.

\* Includes municipalities Divača, Hrpelje-Kozina, Izola, Komen, Koper, Piran, Sežana.

\*\* Includes counties Primorje-Gorski kotar, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia, Dubrovnik-Neretva.

### Contemporary National Tourism Strategies

#### Tourism Strategy of Sovereign Nation-States

Within Yugoslavia, until 1991, the tourism strategy on the Istrian peninsula was one of interdependent areas. The co-operation between Slovenia's tour-operators, travel enterprises and the Croatian accommodation amenities in Istria was at the highest level. Such a healthy interdependent working environment could also be achieved because the region as a whole had a common history and was, in part, inspired by regionalistic tendencies. Such attitudes are common in regions on the peripheries of states. Two Slovenian travel agencies, Kompas Jugoslavija and Globtour, dominated the tourist market of Istria, offering excursions and serving as the middleman between hotel/accommodation businesses and the tour-operators of Austria, Germany and Great Britain. Transfers from and to the Croatian airports of Pula, Rijeka and Ljubljana were often operated by the third Slovenian player, the bus company Slavnik Koper. The major charter airline of former Yugoslavia, Slovenia's Adria Airways, handled close to 75% of arriving and departing passengers from the above airports. Yugoslavia, with numerous coastal and island resorts in Istria, Dalmatia and Montenegro was among the five

leading European airline inbound tourist destinations in the mid-1980s (Gosar, 1989).

On June 25, 1991, both Slovenia and Croatia declared independence and sealed their territories with (not yet defined) borders. Co-operation in tourism ended almost overnight. The new laws of each of the two young nation-states had to be obeyed. Several travel agencies and bus companies, in particular in Slovenia, had to reduce their business or close not only their offices in the neighbouring state but, due to lack of business, their headquarters. In hotels in Slovenian and Croatian Istria, a lack of "all-inclusive" tourists (who typically came by plane and used the complete amenities of the hotel) was evident. For several years, hotels had to count on individual guests only. Adria Airways had to sell eight of their 14 mid-range jets and turbo-prop aircrafts.

Between 1992 and 1996, tourism enterprises in Slovenia and Croatia had to adapt to new geopolitical and, consequently, economic realities. Not only did the break-up of Yugoslavia produce several independent states, it also induced two wars in the region: from 1991 to 1995 (Croatia, Bosnia and Herzegovina) and in 1999 (Kosovo). At the same time, it changed the basis of the economy: from socialist central plan-

ning and the so-called soft communism economy (self-management) to a market economy (capitalism) and democracy. Independent national economic strategies, based on a market economy, were produced, often with the assistance of international experts. The tourism strategy of Slovenia was produced in 1992 (Sirše et al., 1992). The Croatian tourism strategy had to wait for several years, due to the instability and constant war-like conditions in the tourist region of Dalmatia, and was published in 1996.

#### Diverse Paths in Istrian Tourism

In the Slovenian "Development Strategy for the Economic Sector of Tourism", the traditional spa and other inland thermal resorts gained development priority. With 25 major spa-resorts, Slovenia has rightfully claimed the title of the "Watering Place of Central Europe". Istria's Mediterranean coast in Slovenia was no longer seen as a source for the sun, sea and sand tourism; instead, a great opportunity was sought in the geopolitical fact of being the closest neighbor to the gaming- and gambling-loving population of Italy. In the pre- and post-independence period, Slovenian entrepreneurs opened five casinos along the Italio-Slovene border (of a total ten in all of Slovenia). The tourism strategy supported this trend. For Istria and the "Coast and the Karst" tourist area, the strategy also suggested the development of conference centres and event tourism (Sirše & Mihalič, 1999). Near the Mediterranean beaches, indoor tropical landscapes and aqua parks opened their doors.

The Croatian development strategy remained more conservative. With the exception of the capital of Zagreb, the pilgrimage town of Marija Bistrica, the Castle of Trakošćan and three traditional spa-resorts (Krapinske, Tuheljske and Stubičke toplice) the 85 remaining "major tourist resorts" (Group A) are located on the Adriatic Sea. The 14 tourist resorts of Istria are Opatija, Ičići, Lovran, Medveja, Mošćenička Draga, Rabac, Medulin, Pula, Rovinj, Vrsar, Funtana, Poreč, Novigrad and Umag (Narodne novine, 1994). Despite its traditional view of tourism, the Croatian development plan foresees several manmade or developed attractions that would supplement the abundance of Mediterranean nature. Water-oriented sports like sailing, motorboat yachting, surfing and snorkelling are already booming in Croatian Adriatic resorts. Other sports, such as tennis, horseback

riding and golf, have also been developed in traditional fishing villages. In the sub-coastal, hilly inland of Istria, wine-routes and rural tourism have gained ground (Boškovič, 2000; Jordan, 2000).

The transition from the communistic central planning model to a market economy was far from having clear goals in the national strategy. At first, the former state-owned mega-enterprises became subdivided into smaller units (hotels, restaurants, shops, play grounds and beach), thereby becoming legally independent. Due to the economic problems of the communist past, the financial value of those small units was at a minimum at this point. The consequences were fictitious bankruptcies, which puts those companies into hands of well-informed individuals, often politicians. For a short period, state-owned banks became owners of these "insolvent" companies. Selling the assets to the highest bidder, including local or international consortiums, investment groups, hotel-chains or tour operators, was the next step in this transition process. In Croatia's Istria, foreign investors were eager to establish themselves:

- The Spanish hotel enterprise Sol Melia bought-up major resorts in and around two Istrian towns Umag and Rovinj. The naturist camp and several hotels in Vrsar have received British and German owners. Hotels in Pula are in hands of the Italian finance and investment institution Marconi (Šuligoj, 2000a).
- Istria's largest tourist resort Plava laguna (The Blue Lagoon) was bought-up by a Croatian émigré and owner of copper mines in Chile. The enterprise was managed for several years by an American management institution (Gosar, 2001).
- Opposite to the Slovenian resort of Portorož, in Savudrija, Croatia, the investment of Hypo-Adria Bank finally resulted into the opening of Kempinski Adriatic Resort and Golf Course in 2008 (Šuligoj, 2001).

In Slovenian Istria, transition followed the path as described above. However, foreign investors were hindered, to some degree, from investing in the Slovenian tourist infrastructure. Well-established domestic firms, like publishing houses, pharmaceutical firms, automotive companies, etc., expressed in-



terest in becoming owners. Profits made in their primary business have been invested into hotels, marinas, aqua parks and other real estate and management of the industry:

- The Terme Čatež spa invested in hotels in the port-town of Koper. Hotels gained indoor and outdoor freshwater and saltwater pools, and waterparks in artificial tropical environments. The investment was made possible because Slovenes were hindered in visiting their favorable Mediterranean resort due to the war in Croatia between 1990 and 2000, and have therefore found their own "continental Adriatic" in watering places of their own country.
- The Krka pharmaceutical firm first bought spa-resorts (Dolenjske toplice, Šmarješke toplice) and then the Mediterranean coastal resort of Strunjan, renovating it to the standards of a wellness resort.
- The Istra Benz petrol and gas distributor invested in the hotel infrastructure of Portorož, the largest Mediterranean tourist resort in the Slovenia. The firm has a major say in the yacht harbour-marina and operated most of hotels (Life Class Hotels) in town (Popit, 2000).
- The Austrian Monarchy's 1906 hotel ruin Palace was renovated to 21<sup>st</sup> century hotel standards by the above-named petrol distributor and in 2008 sold to the Kempinski hotel group (Šuligoj, 2000b).

### Contemporary Tourism in Istria

Istrian tourism has an approximately similar status in the economies of both countries. Slovenian Istria had 22% of the overall number of guest-beds of the state in 2012; in Croatia, the number of guest-beds in Istria was 28% of the Croatian total. In Croatia, the amount of accommodation amenities has not changed dramatically. In fact, in several tourist resorts, the number of beds offered has fallen due to the reconstruction of hotels and the enlargement of rooms. New accommodation amenities are rare, as many potential investors hesitate to invest in regions where political instability was present so recently.

The renovation of hotels, particularly in Slovenia, is, therefore, more common. However, if the amount of Croatian Istria guest-amenities is compared with the same in the Slovenian part of the region, a ratio of 1:10 is evident (90.4% in Istria of Croatia and 9.6% in Istria of Slovenia). Slovenes were very slightly better off in providing guest beds in hotels (38.5% hotel-beds in Slovenian Istria in 2012 against 38.2% in Croatian Istria. Among motives to visit, new amenities related to gaming and gambling, cycling, tennis and golf as well as to wine tasting (oenology) and culinary pleasures are observed. In the first decade of the 21<sup>st</sup> century, 'sun, sea and sand motives' intermingle with activity and action types of tourism in both nation-states.

### Status of Tourism in Istria

The number of available amenities has no relation to the number of tourist visits and their overnight stay in the region. Visits to Croatian Istria show predominantly a seasonal character (April–September); accordingly, the majority of hotels and other tourism-related amenities close during the winter. Slovenian hotels do not close their doors (one exception in early 2014). In the peak-years of Croatian/Yugoslavian tourism (1980–1986), the relation of guest-visits to Istria was 23:77 in favour of other Croatian tourist regions. However, in 2012 Istria registered close to one quarter of all visitors to Croatia (25.2%), thus becoming the most profitable tourist region of the nation. The share of visitors to Slovenian Istria remained almost equal: in 1985, 19.5% of all visits to Slovenia resided in Istria, while, in 2012, such visits amounted to 20.0%. Visits to both parts of Istria annually provide about 24 million bed-nights: about 22 million in Croatia and about 2 million in Slovenia. Citizens of Slovenia (16.2%) and neighboring EU countries, such as Austrians (10.9%) and Italians (9.5%), consider Istria as a whole to be the playground in their own backyard and therefore make a substantial amount of visits. However, because Bavaria is a mere four driving hours away, in 2012 German residents were leading in the overall number of visits (28.3%). Most popular for them is the Croatian part of Istria (30.1%); the share of German visitors in Slovenian Istria is far below 10% (Table 5) (Statistical Office of the Republic of Slovenia, 2001).

Table 3 Istria: Accommodation Amenities in Leading Tourist Resorts

RESORTS	Beds (in 000)							
	2010		2005		1995		1985	
	All	Hotel	All	Hotel	All	Hotel	All	Hotels
Portorož	8.2	5.1	9.5	5.1	8.9	4.5	12.2	4.5
Piran	1.2	0.3	1.4	0.3	1.1	0.3	1.8	0.3
Strunjan	1.6	0.7	1.5	0.8	1.4	0.7	1.8	0.0
Izola	3.8	1.6	3.1	1.1	2.9	1.1	3.1	0.6
Koper	1.1	0.6	0.9	0.5	1.2	0.4	1.0	0.4
Ankaran	3.2	0.7	3.1	0.7	3.6	0.7	3.2	0.6
SLOVENE IS- TRIA*	19.1	9.0	21.8	9.1	22.1	10.6	23.1	7.5
Umag	32.3	9.7	29.6	12.1	27.7	11.3	46.2	18.8
Novigrad	11.1	1.5	9.1	1.8	8.5	1.7	10.2	2.1
Poreč	24.3	11.5	50.6	23.9	47.3	22.3	49.3	23.2
Vrsar	19.6	2.8	37.8	4.0	35.3	3.7	38.7	4.1
Rovinj	39.1	6.6	33.7	12.2	31.5	11.4	32.8	11.9
Pula	20.9	6.6	17.9	10.1	16.7	9.4	45.7	25.7
Rabac	10.3	5.4	1.1	5.8	9.4	5.4	11.4	6.3
CROATIAN ISTRIA**	268.4	/	230.3	88.3	215.2	73.2	234.5	92.1

Source: Croatian Bureau of Statistics, 2006; 2014; Statistični urad Republike Slovenije, 1997; 2007; 2014.

\* The Tourist-region "Obala in Kras" (The Coast and the Karst).

\*\* The Province of Istria (County of Istria).

Tourism growth, according to data regarding bed-nights and visits, reflects the political situation and the societal and economic transition that took part over the previous two decades. Istria's tourism reached its peak of visits in the 1986. More than 30 million bed-nights were registered, among them, almost 27 million were in Croatian Istria. The 13 leading tourist resorts (Table 4) registered 23.8 million bed-nights. The region was popular among foreigners who made 58% of tourist visits to the Slovenian and 64% to the Croatian parts of Istria. The violent demonstrations of Serb nationalists in Croatia, and plans for independence, in the summer of 1989 reduced visits to a large extent. Tourist visits in 1995, compared to data of the mid-1980s, amounted to 57%

in Slovenia and 24% in Croatia. In the fourth year of independence, as the violent conflict in Croatia neared its end, Croatian Istria registered just 31.1% of tourist visits in comparison to those of 1986. In Slovenia, where the independence declaration on June 25, 2001 resulted in a mere ten days of fierce fighting, Istrian tourism survived with a 28.6% reduction of visitors. Primarily due to its geographic distance from the war, Istria was better off in terms of visits compared to the rest of the Croatian regions.

#### Changed Structure of Visitors to Istrian Tourist Destinations

In the new nation-states, the structure of visitors changed dramatically. Whereas in Slovenian Istria



visits made by guests from abroad declined (46% foreign nationals), international visits to Croatian Istria, in relation to domestic, increased (77% foreign nationals). There are several reasons for such developments. One definitely lies in the tourism statistics: since 1991, those considered domestic tourists are Croatian citizens only, whereas visitors from other parts of the former Yugoslavia, considered “domestic” until 1991 (including Slovenes) are considered “international visitors”. Therefore, in the Croatian statistics, visits to one of the traditional playgrounds of Slovenes in Croatia, to the Istrian peninsula (where close to 10,000 second homes and other real estates of Slovenian citizens exist), Slovenes are no longer registered as “domestic” (meaning Yugoslav) but as guests from abroad. In contrast, the wars in Bosnia and Herzegovina, and in particular in the Croatian province of Dalmatia, another traditional Slovene summer holiday destination in Croatia, have kept Slovenes either in their own state or in the near vicinity (in Croatian Istria). The absolute increase of “domestic”, i.e. Slovene, tourists in Slovenian Istria, and the absolute and relative increase of Slovene tourists (as “international visitors”) in Croatian Is-

tria, and the general decline of the number of other international visitors characterize the tourist statistics in both nation-states in the 1990s. (Kerma et al., 2009). Accumulated data for 2010 in Slovenia and 2012 in Croatia reveals that visits and bed-nights in Istria have almost surpassed the peak figures registered in the mid-1980s (Table 4).

The analyses of TOMAS (Tourism Marketing Study) questionnaires distributed among several thousand tourists in Croatian and Slovenian Istria in 1997, 2000 and 2004 has revealed that the natural environment (the sea, the sun) with their human-made resources (dried ham, wine, casinos) received highest grades. The observations made by tourists point out the shortage of events, in particular presentations of local ethnography (dances and songs), and other high-adrenaline-type offerings (sports). According to TOMAS, Istria is a preferred region by tourists with mid-sized budgets, families with children, and the age group between 20 and 40 years. The most probable origin of the average tourist in Istria is West- or East Central Europe (Mikačić, 1994; Marušić, 1997; Škafar et al., 1998).

*Table 4* Accommodation Amenities, Number of Tourist Arrivals and Nights in the Leading Tourist Municipalities in Croatian and Slovene Istria in 2012

2012	Tourist beds			Tourist arrivals			Tourist nights			
	Number	Share (%)*	Total	Share (%)*	Domestic tourists	Foreign tourists	Total	Share (%)*	Domestic tourists	Foreign tourists
Labin	11,314	1.3	194,537	1.6	8,213	186,324	1,215,829	1.9	30,085	1,185,771
Novigrad	10,834	1.2	161,869	1.4	6,421	155,448	852,590	1.4	18,836	833,754
Vrsar	18,764	2.1	171,166	1.4	2,319	168,847	1,387,632	2.2	18,434	1,369,198
Poreč	23,485	2.7	409,679	3.5	21,595	388,084	2,624,977	4.2	71,911	2,553,066
Pula	18,283	2.1	229,635	1.9	29,087	200,548	1,259,393	2.0	101,489	1,157,904
Rovinj	32,726	3.7	427,730	3.6	24,940	402,790	2,981,256	4.8	80,061	2,901,195
Umag	21,055	2.4	340,439	2.9	25,404	315,035	1,725,976	2.8	93,728	1,632,248
County Istria - TOTAL	245,267	27.8	2,985,042	25.2	166,161	2,818,881	19,877,368	31.7	656,538	19,220,830

2012	Tourist beds		Tourist arrivals				Tourist nights			
	Number	Share (%)*	Total	Share (%)*	Domestic tourists	Foreign tourists	Total	Share (%)*	Domestic tourists	Foreign tourists
<b>CROATIA</b>	<b>881,626</b>	<b>100.0</b>	<b>11,835,160</b>	<b>100.0</b>	<b>1,465,934</b>	<b>10,369,226</b>	<b>62,743,463</b>	<b>100.0</b>	<b>5,221,326</b>	<b>57,522,137</b>
Izola	4,622	3.8	121,541	3.7	49,207	39,229	327,099	3.4	197,491	129,608
Koper	5,253	4.3	99,909	3.0	58,284	41,625	351,190	3.7	224,770	126,420
Piran	14,685	12.1	408,626	12.4	143,549	265,077	1,372,806	14.4	483,231	889,575
Slovene Istria - TOTAL	24,560	20.2	630,076	19.1	251,040	345,931	2,051,095	21.6	905,492	1,145,603
<b>SLOVENIA</b>	<b>121,541</b>	<b>100.0</b>	<b>3,297,556</b>	<b>100.0</b>	<b>1,141,944</b>	<b>2,155,612</b>	<b>9,510,663</b>	<b>100.0</b>	<b>3,733,459</b>	<b>5,777,204</b>

Source: Croatian Bureau of Statistics, 2014; Statistical Office of the Republic of Slovenia, 2014.  
\* within the frame of the nation-state (Croatia/Slovenia).

*Table 5* Numbers and Shares of Overnight Stays in Slovene and Croatian Istria by Countries of Residence in 2012

Countries of residence	Slovene Istria, Slovenia*	Share (%)	County of Istria, Croatia	Share (%)	Total Istria (Slovenia and Croatia)	Share (%)
Austria	243,680	11.9	2,386,951	10.9	2,630,631	10.9
Bosnia and Herzegovina	6,329	0.3	85,679	0.4	92,008	0.4
Croatia	9,507	0.5	932,889	4.2	942,396	3.9
Czech Republic	28,609	1.4	745,190	3.4	773,799	3.2
France	19,080	0.9	247,497	1.1	266,577	1.1
Germany	172,967	8.4	6,627,614	30.1	6,800,581	28.3
Hungary	37,226	1.8	329,216	1.5	366,442	1.5
Italia	248,702	12.1	2,039,863	9.3	2,288,565	9.5
Netherlands	25,553	1.2	1,679,780	7.6	1,705,333	7.1
Other countries	287,426	14.0	2,809,740	12.8	3,097,166	12.9
Poland	20,410	1.0	467,024	2.1	487,434	2.0
Slovakia	15,654	0.8	235,077	1.1	250,731	1.0
Slovenia	905,492	44.1	2,992,118	13.6	3,897,610	16.2
United Kingdom	17,841	0.9	360,173	1.6	378,014	1.6
USA	12,619	0.6	54,058	0.3	66,677	0.3
<b>TOTAL</b>	<b>2,051,095</b>	<b>100.0</b>	<b>21,992,869</b>	<b>100.0</b>	<b>24,043,964</b>	<b>100.0</b>

Source: Croatian Bureau of Statistics, 2014; Statistical Office of the Republic of Slovenia, 2014.  
\* Includes (only) coastal municipalities Izola, Koper, Piran and not the Karst hinterland.

In general, since 2000, a highly positive trend has been observed regarding international visits:

- In both parts of Istria, guests from neighboring regions and states of Central Europe (Venetian Italians, Austrians, Hungarians, Czechs, Slovaks, Bavarian Germans and Slovenes) dominate, in contrast with the pre-independence years in which Germans, English and Dutch citizens comprised the bulk of visitors.
- All-inclusive air-hotel arrangements are reduced in quantity; instead, individual bookings and half-pension arrangements for motorists, made by travel agencies, are common in summer. Out-of-season visits by specialist groups (bicyclist, football teams and other training-oriented groups), in particular older people, travelling by bus, have become very popular.
- In Croatian Istria, 75% of visits are made during the peak-summer season (June, July, and August), as visitors prefer to stay one week or more (Poreč-Parenzo average: 6.8 days). Among the West European naturist clubs, the well-known resorts of Vrsar-Koversada (7.9 days) and Rovinj-Rovigno (7.4 days) lead regarding length of stay.
- In Slovenian Istria, tourist visits in the peak-summer season equal the number of visits in other nine months of the year. However, the average visit lasts just 3.6 days, highlighting the fact that event tourism (congresses, meetings) and all-year long week-end tourism, particularly in gambling and aqua park environments, are general motives for tourist visits. Similar trends can be observed in the neighboring Croatian tourist resort of Umag (5.9 day average) where the casino and different sport facilities (tennis training camps; marina) have both shortened the average length of stays and prolonged the season.

## Conclusion

The peninsula of Istria is one of the Mediterranean's major tourism destinations. Regarding the early contemporary tourism development (post-1960s), this tourist destination could be compared to that of Costa Brava, Spain. Since the partition of Yugoslavia into independent and sovereign nation-states (1991),

four fifths of the peninsula is shared by Slovenia and Croatia. The smaller part of the peninsula, around the port of Trieste, belongs to Italy and plays a limited role in regional tourism. Slovenia's efforts to join the EU and NATO succeeded in 2004, while Croatia joined the EU in 2013. In the past two decades (1990–2010), both tourist destinations have experienced an atypical tourism development cycle induced by:

- Ethnic disputes, conflicts and wars (which were fought in relatively distant areas from Istria, in southern Croatia, Bosnia and Herzegovina and Kosovo);
- Transition from the socialist central planning to contemporary market economy;
- Division of the former federal state (Yugoslavia) into sovereign entities.

The post-socialist transition period included the takeover of state-owned tourist infrastructure by banks, international consortiums and private owners. Due to diverse state politics, tourism in Istria has become diversified. In both Slovenia and Croatia, local entrepreneurs now have a limited say in tourism management. In Croatia, international tourism enterprises, consortiums and banks dominate the market economy. In Slovenia, businesses not related to tourism, e.g. pharmaceutical enterprises, publishing houses, tire producers and petrol distribution companies, residing in the hinterland and nation's capital, manage the coastal tourism industry. Tourism bed-nights in Slovenian Istria are based on hotel and bed-and-breakfast accommodation, whereas in Croatian Istria camping and apartment-type tourism still prevails. Contemporary tourism trends, such as casinos, nautical and sport tourism, as well as inland wine and farm tourism, have made an excellent entry into the tourism industry of both countries.

The once politically and economically unified area of Istria has had to adapt to diverse national rules of law, tourism strategies and market economies. After a sharp decline in the 1990s, tourist and bed-night numbers have returned to the record numbers of the 1980's. However, the structure of visitors has changed. British, Dutch and Scandinavians visits decreased as visits from the region, in particular from the neighbouring countries of Italy, Austria, Hungary, as well as southern Germany and Slovenia

increased. Slovenian and Croatian Istria has become a playground of the region. The numerous cross-border development projects of the EU will enable increased cooperation of enterprises and entrepreneurs (including research institutes) of Istria's Slovenian and Croatian part and a substantial number of innovative tourism products should soon be offered on the market.

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