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Changes of tourism trajectories in (post)covidian world: Croatian perspectives

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ABSTRACT

This paper analyses impact of the COVID-19 pandemic on Croatian tourism. The analysis is based on data on tourism arrivals, overnight stays and tourist beds in the period January – September in 2019 and 2020, as later data for 2020 was not available at the moment of writing. Generated from the online-registering system data was specially prepared by the Croatian Tourist Boards. Apart from an immense decline in all tourism parameters, which goes in line with global trends, the results of our research reveal changes that occurred in terms of seasonality, spatial distribution of tourism, average stay, organization of arrival, age, origin and type of accommodation used, according to the data available. The paper further discusses the global context of the pandemic situation and local and personal responses that have an important impact on re-directing and tracing eventually new tourism trajectories of the (post)pandemic time. Two principal groups of factors have been recognized as mostly affecting the processes, trends and possible future trajectories have been identified: on the one hand global movement and travel bans and restrictions, on the other hand personal responses reflected in motivation and behavioural changes. Changes that occurred in pandemic time are seen as catalysts for re-enforcement and raised interest in escapism and slow movements in tourism. Instead of seeking to 'go back to business as usual', the authors argue to reconsider the trajectories that emerged during the time of the pandemic and to envisage other approaches towards more sustainable tourism.

1. Introduction: Reflections on global context vs local and personal responses

Almost a year ago the world was hit by the global SARS-CoV-2 pandemic. Back then one could not predict its real outreach and dimensions. Although in the beginning one could discuss why some world regions were hit heavier than others, the whole world was overruled step by step. Almost every country had some kind of softer of harder lockdown. It affected all segments of life, from our everyday lives and routines to health care, economy, education, services… One of the aspects that hardly concerned the usual pre-pandemic activities was the change, or better the severe restrictions of migration and the movement of people and goods. And everything else followed. When the first (the spring) wave died away, optimists hoped that life would return to the pre-pandemic level, although epidemiologists warned of a second wave. Sadly, they were right. In autumn, the numbers of COVID-19 victims reached higher levels every day. At the moment of writing[1] many European countries proclaimed a second lockdown. We are now faced with a so-called "new normalcy" which would clearly last longer than we had ever hoped and will direct all aspects of our lives in new ways.

Depending on their exposure to the pandemic and the individual approaches how countries dealt with it, some countries suffered from severe to even devastating consequences in terms of direct human COVID-19 victims, compared to others. That, however, does not mean that all the other aspects of life and economy equally followed the same pattern. Since the global world is totally interconnected, and everything is linked to everything in some way, even the countries with a more favourable situation suffered (and are still suffering) from the immense disruption and the profound changes in all aspects of life and the economy. In some brief moments some European countries or regions were proclaimed 'corona safe' or even 'corona free' (e.g. Montenegro, or Istria in Croatia), and thus represented the most desirable tourist destinations. But in circumstances of more affected countries in their surroundings, partially closed border crossings, the obligation of quarantine and considerably restricted movements between countries or regions within countries, those 'corona free' areas experienced the

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consequences of the global pandemic as well.

The vast majority of the early research work is dealing with the spread of the pandemic and its medical, health and prevention questions. Considerable attention was payed also to economic and social consequences of the lockdowns, and consequently of the shutting down of the most 'unnecessary' businesses, especially in the first few spring months of the pandemic. And a great deal of these 'unnecessary' businesses are closely aligned to tourism. COVID-19 has changed the world forever in every imaginable way and has impacted heavily on international travel, tourism demand, and the hospitality industry, which is one of the world's largest employers and is highly sensitive to significant shocks like the COVID-19 pandemic (Chang et al., 2020).

As tourism is essentially about movement and travel, global restriction of travelling had an immense impact on it. According to an early assessment of the COVID-19 impact on tourism (Gössling et al., 2021), over 90% of the world population live in countries with some level of international travel restrictions and many of them also have some degree of restrictions on internal movement (inter- or intra-regional). Mu et al. (2020) in their research of the interplay of the spatial spread of COVID-19 and human mobility in 319 Chinese towns, state that travel interventions reduced inter- and intra–city mobility by approximately 70%. Early evidence on air travel, cruises as well as accommodation shows a devastating picture, e.g. with global flights dropped by more than half, and cruise ships, usually idealized as safe environments at sea, were stuck in quarantine and turned out to be the worst option. Massive cancellations also made a huge impact on the accommodation sector. A comparison of the week of 21 March 2019 and 2020 shows that guest numbers fell by 30% to 90%[2] (Gössling et al., 2021).

The potential to reshape and re-direct the tourism trajectories lies with personal responses. Widespread restrictions on public gatherings and community mobility, as a main means to prevent the diffusion of the disease impacted also changes in peoples' motivation and behaviour. Personal views and reflections primarily due to isolation forced all of us to withdraw from the outer physical and social world to our nearest and private environment (Armiero, 2020; Smith, 2020). The necessity to distance from each other leads us to more isolated places, mostly in nature, urban or extra-urban, inciting us to (re)evaluate some other new (or not so new) values. Some research also focused on new attitudes towards urban green areas and their new contextual meaning in the condition of looking for physical distancing and isolated places. The research, carried out in six European countries, showed changes in motivations as non-essential or high-risk activities were reduced and a new focus laid on urban green spaces, that were found important, not only in terms of infection security, but also for providing places of solace and respite (Ugolini et al., 2020).

In such circumstances of restricted regional, national and international travel, views on mobility may also have changed in our everyday context. The increase of walking, trekking, cycling and other outdoor activities meant (re)evaluating and (re)experiencing environmental values to keep and maintain our wellbeing. Such a new focus on mobility, which favoured moving and travelling slowly through space, implies an immersion in the environment and a new kind of connection with the environment. Here, participants become also physically part of the experience itself (Pileri & Moscarelli, 2021). This is a part of the 'slowness' movement as a conscious and alternative attitude. The concept of slowness is the reaction to the "cult of speed" (Pileri & Moscarelli, 2021) and everyday pressures of the modern Western world. As such, rejecting the speed as a prevailing social norm and lifestyle, together with everyday routines and constraints of modern society (Cohen, 2010), the concept of slowness is closely linked to the concept of escapism. Escapism consists of two directions: escaping from, or avoidance of, and the process of seeking (Cohen, 2010). Moving and travelling in the covidian world thus correspond to both. Apart from escaping the rush and crowd and trying to reach the slowness of everyday life through seeking isolated places as places of solace and respite, there is newly added covidian dimension.

Slow movement is favoured by specific trails. Every slow movement follows a planned and created route, such as walking or trekking paths, bike routes or alike (Pileri & Moscarelli, 2021). Some of them, e.g. the *Via Adriatica* in Croatia, are especially promoting the pure nature and wilderness ("at the doorstep of the civilization") as its main value[3]. Hiking trails have been gaining wide popularity during the past years throughout the world and it seems that they have benefited from the pandemic. Good examples that show a rapid growth of hikers are world-famous long distance trails e.g. the *Pacific Crest Trail* (PCT) in North America and the *Camino de Santiago* in Europe. According to available official data for the last five years (2014–2019) the number of hikers on the PCT almost tripled (197%), while annual growth reached almost 40% (PCTA, 2020). The Camino de Santiago showed an increase of 46% during the same five-year period, growing annually by 9% (Oficina De Acogida Al Peregrino, 2020). The example of *Via Adriatica* shows the impact of the pandemic on the popularity of the trails. Although a fairly new long-distance walking trail, and great numbers of hikers cannot be recorded so far, there is a sharp rise in number in 2020, compared to the two previous years with a ratio of 14:2:2 (Via Adriatica Trail, 2020). While during the pandemic hiking would be mainly intra-national (because of international movement restriction), in the post-pandemic time it might profit of the newly gained attraction.

The choices of destinations and the preference for a particular type of tourism (if there was a possibility to travel) have changed profoundly. We are not (yet) able to speak about the *post-covidian world* at the moment, because we are in the midst of it, but we may perhaps be able to trace some new emerging trends, orientations or trajectories that were initiated, born and developing or intensified and can, as well, be recognized from a new restricted SARS-CoV-2 pandemic world.

This paper analyses the impact of the COVID-19 pandemic on Croatian tourism in general and raises some questions. Have the observed changes also changed the trajectories of tourism for the post-pandemic time? Will this global pandemic have a structural impact on tourism in a more enduring (or permanent) way? It is, of course impossible to know that at the moment, but identifying these (new) trends may be the way of conceptualizing the new more sustainable post-covidian tourism. Authors widely agree that present, or better to say pre-covidian, tourism is far from sustainable (Gössling et al., 2021). So, from lessons learned, this would be the chance not to go to 'business as usual' after the pandemic, but to envisage other approaches.

2. Data and methods

The analysis is based on data on tourist arrivals, overnight stays and tourist beds in the period January – September in 2019 and 2020, as later data for 2020 was not available at the moment of writing. Furthermore, the research required more detailed data on structure of tourist arrivals and overnight stays, which is usually not published by the Croatian Bureau of Statistics that provides tourism statistics on a year-to-year basis. Therefore, needed data was specially prepared by the Croatian Tourist Board, generated from e-Visitor, an online-based system for tourist registration in Croatia. It was analysed by counties for Adriatic and Continental Croatia. Adriatic Croatia comprises the counties of Istria, Primorje-Gorski Kotar, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia and Dubrovnik-Neretva, Continental Croatia includes the City of Zagreb and the following 13 counties: Zagreb, Karlovac, Sisak-Moslavina, Bjelovar-Bilogora, Koprivnica-Križevci, Krapina-Zagorje, Varaždin, Međimurje, Virovitica-Podravina, Požega-Slavonia, Brod-Posavina, Vukovar-Srijem, Osijek-Baranja (Fig. 1). The analysis

[2] Based on data for 24 countries of the world.

[3] *Via Adriatica*, a long distance walking coastal mountaineering trail in Adriatic Croatia.

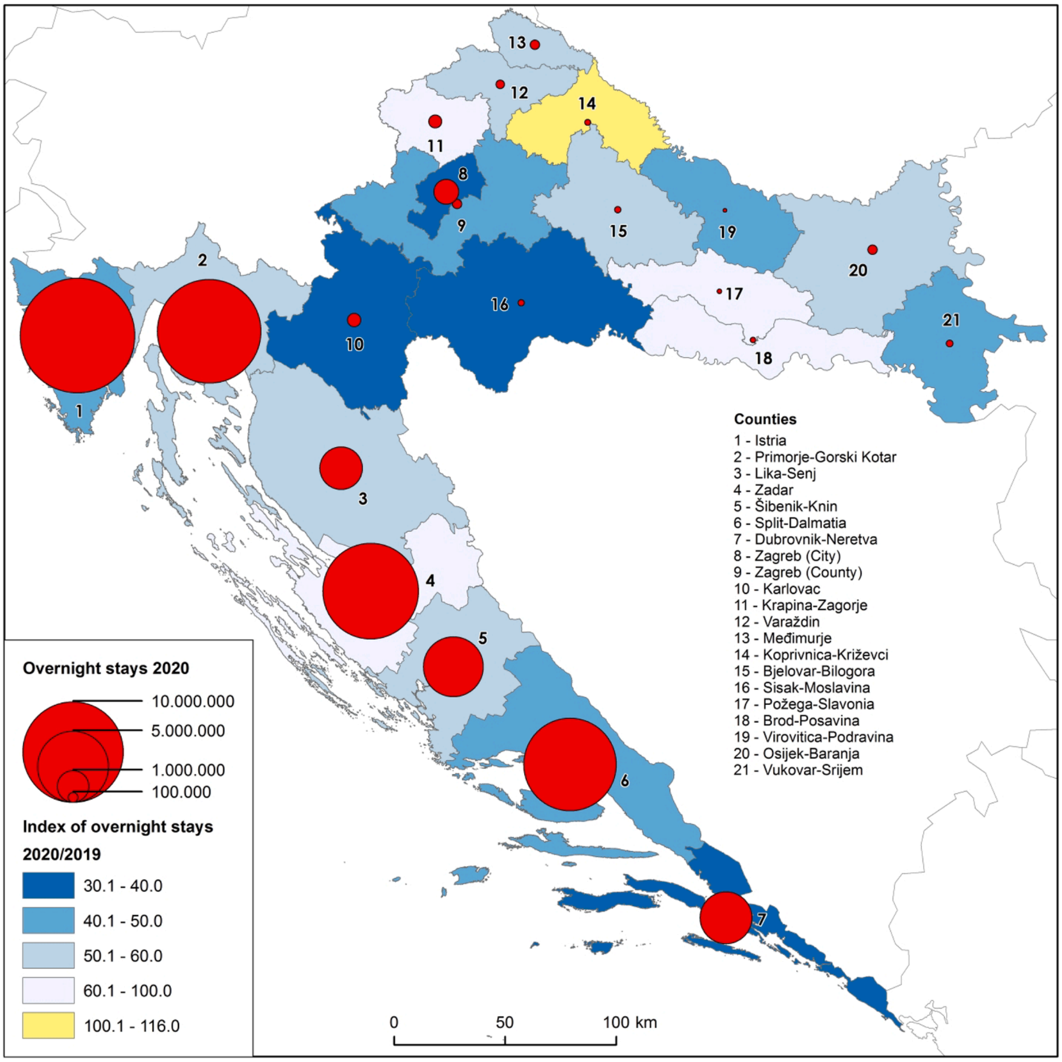

Fig. 1. Overnight stays in Croatia from January to September 2020 and index of change of overnight stays from January to September 2020/2019, by counties Source: CTB (2020b).

included total data for Croatia in also in October, retrieved from Croatian Tourist Boards monthly report, but detailed data on structure of tourist arrivals and overnight stays was not available in the moment of writing. Beside raw data on tourism, the paper uses descriptive statistics and tourism indicators (e.g. average stays of tourists).

All data include tourist arrivals and overnight stays registered both in commercial and non-commercial accommodations that require registration (second homes, friends' or relatives' homes). Commercial accommodation comprises hotels and similar accommodation (e.g. tourist villages), camping, accommodation in private households (e.g. rooms, apartments and holiday homes), agritourism and other accommodation (e.g. hostels, mountain retreats, lodges).

In addition to the numerical data on tourism, a number of published interviews with tourism officials at various levels were consulted in order to acquire complementary information and recognize the context of the processes.

3. Results and discussion

3.1. Higher seasonality

Throughout 2019, Croatia recorded 20,695,000 tourist arrivals and 108,647,000 overnight stays, both in commercial and non-commercial accommodation (CTB, 2020a). It was another year that was more successful (judging by numbers) that the previous one, and largely outweighed the maximums in the late 1980s that were followed by a whole decade of crisis in tourism caused by the Croatian War for Independence and economic transition (see Šulc, 2016, 2017).

Since data for the whole of 2020 is not available yet, it is only possible to compare the first ten months of 2019 and 2020. In the period January-October 2020, Croatia recorded 7,518,337 arrivals and 53,364,527 overnight stays, which represents only 39.2% of arrivals and 51.1% of overnight stays from January to October 2019 (Table 1). Monthly data for 2019 and 2020 confirm this decline which is directly connected to the COVID-19 pandemic, due to which national governments imposed many limitations for national and international travelling; in addition, people feared to be infected during the trip (e.g. in the plane or the bus). The scale of decline lies within the broad global frames (as mentioned above; Gössling et al., 2021).

In January and February 2020, before the outbreak of the pandemic, tourists continued to visit Croatia even in greater numbers than in the same period the previous year, indicating a potentially new record year in Croatian tourism. However, the outbreak of the pandemic in Europe and Croatia, where the first case was registered on 24 February, stopped international travelling in the following months almost completely. Although Croatia had only few daily cases of COVID-19 compared to the rest of the EU, tourist numbers in March dropped significantly below the levels of January and February, and particularly compared to March in

Table 1
Tourist arrivals and overnight stays in Croatia in 2019 and 2020, by months.[6]

Months	2019		2020		INDEX 2020/2019	
	Arrivals	Overnight stays	Arrivals	Overnight stays	Arrivals	Overnight stays
I	215,074	594,240	226,949	637,748	105.5	107.3
II	274,720	669,438	287,326	727,198	104.6	108.6
III	464,534	1,102,878	118,236	518,530	25.5	47.0
IV	1,158,522	3,319,299	9,453	391,628	0.8	11.8
V	1,649,413	5,630,879	86,413	524,185	5.2	9.3
VI	3,156,124	15,096,388	915,596	4,863,686	29.0	32.2
VII	4,618,374	30,637,144	2.449,953	18,596,819	53.0	60.7
VIII	4,974,188	33,084,153	2.677,969	21,052,085	53.8	63.6
IX	2,289,894	12,811,211	538,664	4,863,990	23.5	38.0
X	1,120,187	3,806,496	207,778	1,188,658	18.5	31.2
XI	397,606	1,017,774	NA	NA	NA	NA
XII	376,285	877,421	NA	NA	NA	NA
I-X	19,921,030	106,752,126	7,518,337	53,364,527	37.7	50.0
Total	20,694,921	108,647,321				

NA – data not available in the moment of writing.
Source: CTB (2020a); CTB (2020b).
[6] For the Index the figures of 2019 are calculated as value 100.

2019. Additionally, a particularly important event was the strong earthquake that hit Zagreb on March 22 (magnitude 5.5) that resulted in one fatality, several dozens of seriously injured people, heavily damaged hospitals, schools and private buildings in the wider town centre and the epicentre area, leaving many people without home. Many people left the city the same day, escaping to second homes, friends and relatives outside the city, but only few were registered in the tourism statistics. Only two days later, on March 24, the government declared a complete lockdown and banned leaving the municipality of residence without special permission, which almost completely stopped people's mobility and travelling. Therefore, in April only 9,453 tourist arrivals were registered (0.8% of April 2019) but relatively high overnight stays (391,628 or 11.8%), with an extremely long average stay of 41.4 days (Table 1). Those were largely the result of national, inter- and intra-regional travelling in late March, before the lockdown, mainly of retired people and employed persons working from home with their families (as schools were also going online) who wanted to spend the lockdown period outside the cities, in places that enable distancing as a mode of keeping away from COVID-19 infections.

As the first (spring) wave of the pandemic in Croatia was rather mild, most COVID-19 measures were eased in May and special permissions for travelling were cancelled on May 11. However, this did not mirror in an increase in tourism (only 5.2% arrivals and 9.3% overnight stays were registered compared to 2019) because of the global character of the pandemic and as most international tourist source countries still suffered from hard restrictions. A partial recovery of tourism started in June, due to an overall better epidemic situation in Europe and Croatia, and continued in July and early August. These two months managed to cover a part of the deficit in tourism compared to 2019 (in July 53.0% of arrivals and 67.7% overnight stays of 2019 were recorded, and 53.8% and 63.6% respectively in August). However, the whole period was marked by national campaigns in the main tourist source countries to convince their citizens to spend the holiday within the country e.g., billboards in Austria “Like Croatia, only without sea urchins” (Index, 2020). For instance, some of the politicians from the Slovenian government, openly talked their citizens out of spending holiday in Croatia due to pandemic, while at the same time a large share of Slovenian tourists did spend their holidays in Croatia being among the most important markets for Croatian tourism.

After August 20, the number of daily COVID-19 infections started to rise again and many countries immediately imposed mandatory testing or isolation for holidaymakers returning from Croatia. This provoked an exodus of international tourists and resulted in a rather unsuccessful September (with only 23.5% arrivals and 38.0% overnight stays, compared to the same period in 2019). As the epidemiologic situation continued to deteriorate and the second (early autumn) wave already largely outweighed the first one (in terms of incidence and COVID-19 related deaths), October resulted in even fewer number of tourists (18.5%) and overnight stays (31.2%) than in 2019.

As Croatian tourism largely relies upon coastal tourism, accompanied by nautical activities, it has among the highest levels of seasonality in the Mediterranean[4]. In 2019, 48.2% of arrivals and 59.7% of overnight stays were recorded in July and August, and 75.5% and 85.8% respectively from June to September. In 2020, the level of seasonality was even higher, with 68.2% of arrivals and 74.3% of overnight stays in the two summer months, and as much as 87.5% and 92.5% from June to September (Table 1), a consequence of the pre-summer lockdown and the post-summer worsening of the pandemic and increased restrictions.

In early autumn several newspapers and news portals published interviews with tourists that visited Croatia in summer and some of them (mainly from Central European countries, e.g., Germany, Czechia, Slovenia, Austria, Switzerland) expressed potential interest for staying in Croatia outside the main season. Most of them quoted as main reasons for their choice the wish to escape from overcrowded (and infection-risky) cities into the safer areas in beautiful and clean nature, fresh air and a more agreeable winter climate (Dnevnik, 2020; Net, 2020; Večernji list, 2020). An additional advantage is the possibility to work from home and to follow distance teaching. In this way, entire families can afford to stay away from urban ‘corona hotspots’ for months, thus completing the usual winter guests (individuals and retirees). Although the official systematic data is not yet released to confirm longer winter stays, but one cannot ignore the fact that here lies a potential of ‘opening a window’ to more prominent long-stay winter coastal tourism in future, or even amenity migration.

3.2. *Spatial concentration*

Before the COVID-19 pandemic, one of main characteristics of tourism in Croatia was its high concentration on the coast and in the seaside counties, due to its high emphasis on coastal tourism. For instance, in the first nine months of 2019, seven coastal counties recorded 88.7% arrivals and 90.5% overnight stays of entire Croatia,

[4] Seasonality in tourism in Croatia is caused both by supply and demand sides. The highest demand in tourism in Croatia in the conditions of coastal tourism is concentrated in the summer season, due to warm sea, high air temperatures and lack of precipitation. The period in which most tourist travel is also conditioned by school holidays or even policies of massive holiday leaves in countries of origin (e.g. *ferragosto* in August in Italy).

almost exclusively in seaside resorts and very few in the hinterland (e.g. in the area surrounding the Plitvice Lakes National Park; CTB, 2020b). In 2020, the situation changed slightly in favour of coastal resorts (90.5% and 96.9%, respectively; CTB, 2020b), but with large regional differences (Fig. 1). The County of Istria, located closest to main source countries (which means easy access by car), meets a fourth of Croatian tourism demand, followed by the counties of Primorje-Gorski Kotar, Zadar, and Split-Dalmatia, highly urbanized areas with natural complexes of coastal zone, islands and hinterland, covering a sixth of the demand each. The southernmost Dubrovnik-Neretva County, despite its high attractiveness, owes its small share of tourism arrivals and overnight stays to its remoteness from the principal source countries and the dominance of air transport, organized groups and cruise tourism. The counties of Šibenik-Knin and Lika-Senj have lower levels of tourism development, tourists visiting only small coastal zones and islands. In the continental part of Croatia, only the capital city of Zagreb used to have a significant number of tourists (6.0% arrivals and 2.0% overnight stays; CTB, 2020b), driven by business tourism (*Meetings, Incentives, Congresses, Events* – MICE), the Advent time in Zagreb, and as stopping place on cultural itineraries for European and East Asian tourists. Apart from Zagreb, only Karlovac County has more than 1% of arrivals, as a transit area to Adriatic Croatia, whereas all other continental areas have a low level of tourism, mainly rural, nature-based and health tourism with short stays.

The index of change (2020–2019) of tourist arrivals and overnight stays reveals a serious decline in tourism in almost all counties (the average for Croatia was 39.2 for tourist arrivals and 51.1 for overnight stays; CTB, 2020b). However, Continental Croatia experienced a stronger decline (indexes 33.2 and 39.8) than Adriatic Croatia (39.9 and 51.5; ibid.), demonstrating the higher resilience of coastal tourism due to the fact that tourists did not yet refrain from spending their main holiday on the coast, but largely by-passed other shorter types of holidays. Less populated coastal areas with isolated islands and accessible by car experienced better results in 2020 than densely populated areas and those that rely upon air transport, e.g. Dubrovnik (Fig. 1). Of all coastal areas, Zadar County recorded the lowest decline (index 65.5 for overnight stays), which can be related to many isolated islands and coastal resorts in the area that represent a perfect choice for a holiday in the pandemic situation. Densely populated counties of Istria and Split-Dalmatia in 2020 had less than half the tourists of 2019. The decline was sharpest in the southernmost Dubrovnik-Neretva County (index of 33.2 for overnight stays) because of its dependence on air transport and organized group tourism (very low in 2020) and cruise ships (almost completely absent). As mentioned before, cruise ships are in fact closed environments and risk being stuck at sea for a long time in the case of an infection (Gössling et al., 2021).

Continental counties so far have had a very heterogeneous response to the COVID-19 situation. Data reveals (Fig. 1) that in hilly areas especially in those close to larger urban centres, the general decline was less conspicuous (e.g. the counties of Krapina-Zagorje, Požega-Slavonia and Brod-Posavina). The rural county of Koprivnica-Križevci that long resisted the spread of COVID-19, was the only one in Croatia that recorded a growth in overnight stays (index 115.5) and had the longest average stay in Continental Croatia. This represents an anomaly in the general trend in Croatia as well as in this particular county. One of the possible reasons for this positive anomaly is generally low number of tourists and overnight stays in that county, due to which small changes in absolute numbers reflect in large changes in relative indicators. However, without further research it is not possible, at this moment and with the available data, to detect the actual cause(s) without oversimplification. On the other hand, Zagreb had the strongest decline of all counties in Croatia, as a combined result of the earthquake and the absence of traditional types of tourists (cultural groups, air travellers from East Asia etc.).

3.3. Longer average length of stay

The average length of stay in 2019 (5.4 days) masks a sharp division between coastal and continental areas. Coastal counties in which tourists usually spend their main holiday have longer average stays (5.9 days), ranging from 4.0 days in Dubrovnik-Neretva County to 7.7 days in Zadar County (CTB, 2020b). Tourism in continental counties has a predominantly transit character and with short-term stays (1.9 days, e.g. city breaks in Zagreb, rural and nature-based tourism; CTB, 2020b).

The COVID-19 pandemic largely changed the usual pattern of visits, as documented by longer average stays (+1.7 on average in Croatia as a whole). Instead of taking multiple short holidays throughout the year, the pandemic has incited many tourists to embark on one long holiday. Movement and travelling restrictions before (and also expected after) summer, accompanied by the many procedures such as border controls, isolation and testing, obviously had a strong impact on their choices and decisions of not only the destination, but also the duration of stay. Coastal areas in Croatia particularly profited from these changes (the average stay increased to 7.6 days), but also continental counties have seen somewhat longer stays (2.3 days). As already mentioned, there is also a kind of prospect of a few winter months with long stays at camping resorts, private villas and holiday houses, as declared by tourism officials according to reservations received (Dnevnik, 2020; Net, 2020; Večernji list, 2020).

3.4. Change in traditional source countries

As a predominantly car destination located in the proximity of wealthy Western European tourist source countries, Croatian tourism is traditionally oriented towards Germany and her closest neighbours in the west and north-west – Slovenia, Austria and Italy. These are followed by landlocked countries in the eastern part of Central Europe – Poland, Czechia and Hungary – that have been oriented to Croatia since the beginnings of tourism (Fig. 2). Guests from all of them, as well as the more distant Netherlands, focus on coastal tourism in summer. Other large tourism source countries in Europe (UK, France, Spain) and the USA mainly favour UNESCO sites and the cultural heritage, particularly Split and Dubrovnik, and rely on air travel. These countries have their own coastal resources or go elsewhere for summer holidays. Tourists from East Asian countries (particularly South Korea, China and Taiwan) participate in transnational cultural itineraries that among others include Zagreb, Split and Dubrovnik with a very short length of stay (in Croatia). Tourists from more distant European countries like Switzerland, Belgium and Sweden use both road and air travel, and participate both in coastal and cultural tourism. Tourists from Bosnia and Herzegovina are almost exclusively attracted by coastal destinations and have a high share because of their proximity.

In 2020, all tourism markets experienced a decline, which however was not linear and cannot be explained generally. The best results, as expected, were obtained in the domestic market (index of change for tourist arrivals was 73.2), where many residents decided to stay in Croatia for summer holidays instead of travelling abroad. The Croatian coast is the usual destination for most domestic tourists, staying in commercial and non-commercial accommodation, as well as in second homes. Many domestic tourists profited from lower prices of accommodation, and were also driven by specific 'pandemic' choices (or needs) to find a place guaranteeing distance and privacy in a coastal destination where they had never been before (e.g. on isolated islands such as Lastovo or Vis). A lower decline in tourist arrivals was recorded from Poland (index 69.8), Slovenia (66.8) and Czechia (65.1), traditionally oriented to Croatian coast, who profited of short distances and/or special transport arrangements (e.g. direct train connections from Prague, Czechia to Rijeka, Croatia). Tourists from Germany, the main source country for many Mediterranean tourist destinations, were next in line by index figures (54.8; Fig. 2).

For different reasons, tourist arrivals from Hungary (index 35.8),

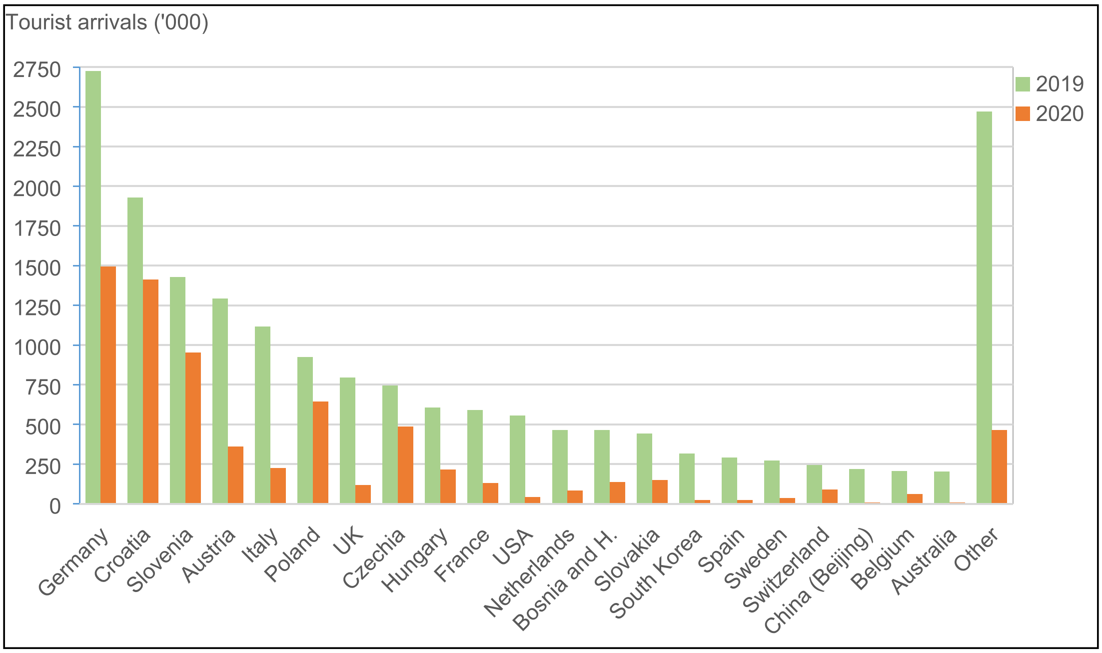

Fig. 2. Tourist arrivals in Croatia from January to September 2019 and 2020, by main countries of origin Source: CTB (2020b).

Slovakia (33.8) and Bosnia and Herzegovina (29.6) diminished to lower levels. Hungary offered its residents financial incentives for domestic travelling (e.g. summer holidays on Balaton Lake), while Bosnia and Herzegovina faced a serious Covid-19 situation during the whole summer. The least expected decline occurred with Austrian (index 27.8) and Italian tourists (20.1) that are usually among the main countries of origin. Both strongly promoted spending holidays within their national borders – Italian tourists focused particularly on coastal areas in Southern Italy, while Austria, as mentioned before, promoted holidays within a country of residence with a motto *Austria – like Croatia, without sea urchins*. The large drop from these two countries had a significant impact on the decline of total tourism in Croatia in 2020.

More remote European countries of origin that depend upon air travel achieved less than 20% of tourist arrivals in 2020 (compared to 2019), parallel to the sharp decline in air transport in general (France – index 22.1; Netherlands 18.2; Russia 15.8; UK 14.7; Sweden 13.2; Spain 8.3; Norway 2.1). Croatia was almost completely avoided by tourists from other continents, that were seriously struck by the pandemic (e.g. USA with index 7.7), strict controls when re-entering the country (e.g. South Korea 7.2; China 4.2) or under lockdown (e.g. Australia 13.8) (Fig. 2).

Most tourists visit Croatia individually, without using the services of travel agencies and tour operators (66.5% tourist arrivals in 2019), while only 33.5% arrive by organized trips. The share of organized trips in 2019 was slightly higher in coastal (34.1%) than in continental counties (28.7). Only three counties stand out with more than a third organized arrivals (Istria 40.4%; Dubrovnik-Neretva 37.5%, Zagreb 37.0%; CTB, 2020b). Istria has large hotel complexes mostly owned by foreign companies that advertise and organize package holidays in their countries. Zagreb and Dubrovnik, on the other hand, are included in organized international tours (usually including air travel). Unfortunately, international flights and many organized tours were cancelled in 2020, reflected in a decline in tourism from these two counties (to less than a fourth of previous tourist arrivals). The aforementioned processes related to the Covid-19 pandemic increased again the share of individual visits in 2020 (77.9% of tourist arrivals), with a drop of organized travelling (22.1%) (CTB, 2020b).

3.5. *Age structure of tourists*

Croatian coastal tourism attracts predominantly people of the middle age group (30–50 years). In 2019, tourists in age 31–50 amounted to 34.2%, younger tourists (up to 30) 36.1% and older ones (50 and above) 29.6% (Table 2). Across people's life-span, tourists are relatively evenly distributed, which reflects the different family situation (couples, families with children, empty nesters or groups of friends).

In 2020, all age groups had a significant decline but more pronounced with the older age groups (particularly 61+). As many older people belong to vulnerable groups at risk from COVID-19 infection, it is obvious that they choose to travel less (at least to Croatia). Their share halved (to 7.5%) compared to the previous year. On the other hand, the share of the middle age groups increased with tourists aged 31–40 to 19.8% and those aged 41–50 to 19.5%. Together with the increase in the youngest age group (0–12 years, up to 15.8%), this demonstrates that families play again a dominant role in Croatian tourism, as they used to have until 2017[5], which results in less diversified structure of tourists by family situation that in previous years.

Coastal counties on average receive younger tourists than continental ones, as coastal tourism usually attracts more families and younger couples. Continental counties, focused on urban, rural and nature-based tourism, have a higher share of older age groups (retirees).

3.6. *Rise of tourism in individual accommodation facilities*

Supply of accommodation in Croatia comprises 1,210,553 tourist beds (CTB, 2020b). Private households with rooms, apartments and holiday houses dominate (52.1%), followed by campsites (20.7%), while hotels account for only 14.4%. An additional 499,225 beds (or 29.2%) were registered in non-commercial accommodation (in second homes and facilities that are usually not rented to tourists), raising the total number of beds to 1,710,478 (tabs. 3 and 4).

More than 95% of all accommodation capacities are concentrated in

[5] In the TOMAS survey on coastal tourists conducted by the Institute of Tourism every three years, in 2017 for the first time couples had a higher share than families with children in the total structure of tourists (Institute of Tourism Zagreb, 2018).

Table 2
Tourist arrivals by age groups in 2019 and 2020 in whole Croatia, Adriatic and Continental Croatia.

Age	Total Croatia		Adriatic Croatia		Continental Croatia		Index of change 2020/2019		
	2019	2020	2019	2020	2019	2020	Total	Adriatic	Continental
0–12	12.3	15.8	13.1	16.7	6.2	7.9	50.2	50.7	42.7
13–18	7.1	7.5	7.3	7.7	5.9	5.9	41.3	42.2	32.8
19–30	16.7	17.6	16.7	17.4	17.2	19.3	41.2	41.7	37.2
31–40	16.8	19.8	16.6	19.4	18.3	23.0	46.1	46.7	41.7
41–50	17.4	19.5	17.3	19.2	18.5	21.7	43.7	44.4	39.0
51–60	15.2	12.3	14.9	12.1	17.4	14.2	31.7	32.4	27.1
61–70	10.2	5.7	10.0	5.7	12.2	6.2	21.9	22.7	16.8
71–120	4.2	1.8	4.1	1.8	4.3	1.7	17.2	17.8	13.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	39.2	39.9	33.2

Source: CTB (2020b).

the coastal counties, supplying coastal tourism, with a structure that is slightly better than in the inland ones. The large share of private accommodation, which is one of the main characteristics of tourism in Croatia, is a result of long and spontaneous tourism development since the late 19th century, and more rapidly since 1960s, often with elements of speculative investments. Short-term lease of rooms, apartments or whole houses to tourists has had certain advantages for individual households and local communities – it provides additional income to their owners and or represents the main source of income in areas that lack other economic activities and has been preventing (more intensive) depopulation. It also increases the purchase power and living standard of the local population that has direct economic benefits from tourism. Most of income from tourism stays locally and supports local economies, instead of massive economic leakage in tourism areas with domination of foreign-owned hotels. However, the structure of accommodation in Croatia with domination of private households is considered as quite unfavourable, due to a lower occupancy rate and highly expressed seasonality compared to hotels (usually booked only in July and August). Tourist resorts where private accommodation dominates usually rely on a simple *sun and sea* products that can hardly attract tourists with more complex motivation that can valorise more local attractions and get involved in different activities and types of tourism. Furthermore, the sector of private accommodation is repeatedly blamed for wasting spatial resources and degradation of coastal areas, as insufficiently controlled and unplanned constructions, often oversized, anaesthetic and in contrast to local built heritage and cultural landscape, are more a rule than the exception.

Despite the COVID-19 crisis, the number of tourist beds did not stop growing even in 2020, and recorded an increase of 1.6%, mostly in coastal areas (CTB, 2020b). Encouraged by constant previous growth in tourism demand, many investments in tourism accommodation planned earlier, started in 2019, continued and were finished in 2020. As tourism supply is less elastic than tourism demand, a possible stagnation or even decline in accommodation capacities might be seen in 2021 or even later.

Although tourism in 2020 experienced a sharp decline compared to 2019, it varied among the different types of accommodation. Hotels experienced the most massive decline (index 26.3 for arrivals and 28.7 for overnight stays; Table 3), as they represent a collective type of accommodation where guests usually have to share common spaces and services (e.g. reception, restaurant, bar, indoor recreation facilities), and, therefore, were perceived as a potential threat to the spread of the disease due to the large concentration of people. This decline was more visible in coastal counties, particularly in the most remote Dubrovnik-Neretva County, that has a high share of hotels in its total accommodation structure.

On the other hand, agritourist facilities saw the lowest decline of all commercial accommodation, despite their small capacities (indexes 65.1 and 75.1). These facilities, located in sparsely populated rural areas, are usually perceived as remote, isolated and far from the crowd, which is desirable for a safe holiday during the pandemic. Similarly, accommodation in private households also profited from their structure (indexes 47.2 and 57.0), as these are often individual units with separate entrances, where people do not have to share common spaces and services with other guests. This type of accommodation proved to be more resilient and adaptive in the COVID-19 crisis and less vulnerable than the hotel sector. Quite unexpectedly, campsites achieved lower results in 2020 (indexes 43.9 and 47.0), although they ought to be open-air and safe accommodation (in terms of COVID-19; Table 3). However, they still represent a collective type of accommodation, whose users have to use some common facilities (e.g. restrooms, kitchen sinks, reception etc.).

Non-commercial accommodation achieved better success than commercial lodging, mostly due to domestic tourists staying at their own second homes, or at friends and relatives. With the indexes 88.5 for tourist arrivals and 84.6 for overnight stays, this type of accommodation proved to be the most desirable in the pandemic year. As these facilities are usually located outside densely populated urbanized areas or in the coastal zone with few visitors or domestic people outside the main season, they were perceived as isolated and safe, without having to be in close contact with other people. As many Croatian residents have second homes, some of them spent the whole period of the lockdown and summer there, particularly residents in Zagreb that escaped after the earthquake. These statements are confirmed by the fact that tourist

Table 3
Tourist arrivals and overnight stays in Croatia in 2019 and 2020, by type of accommodation.

Accommodation	Tourist arrivals			Overnight stays		
	2019.	2020.	Index	2019.	2020.	Index
Hotels	6,598,097	1,734,099	26.3	22,851,938	6,562,744	28.7
Campsites	2,817,693	1,236,602	43.9	18,547,740	8,715,345	47.0
Private households	6,570,116	3,102,980	47.2	38,219,705	21,781,069	57.0
Agritourism	26,941	17,532	65.1	97,406	73,515	75.5
Other	1,782,163	629,889	35.3	7,432,382	3,185,034	42.9
Total commercial	17,795,010	6,721,102	37.8	87,149,171	40,317,707	46.3
Non-commercial	503,717	445,560	88.5	12,501,989	10,572,329	84.6
Total	18,298,727	7,166,662	39.2	99,651,160	50,890,036	51.1

Source: CTB (2020b).

arrivals and overnight stays in non-commercial accommodation in Continental Croatia was the only category in 2020 that recorded substantial growth (by 75.7% in arrivals and 3.9 times in overnight stays; CTB, 2020b). Most of this growth occurred in areas surrounding Zagreb and in the rural easternmost part of Croatia, in many mid-size cities (e.g. Osijek, Vukovar, Vinkovci, Slavonski Brod).

The structure of tourist arrivals and overnight stays is slightly better by type of accommodation than previously analysed tourist beds, with an absolute domination of private households (46.2% of tourist arrivals and 54.0% of overnight stays; Table 4). Hotels and campsites cover between a fifth and a quarter each, while agritourist facilities and other accommodation have less than 10%. If non-commercial accommodation is taken into account, its share has grown due to its perception as safer in the combined situation of pandemic and earthquake. However, one has to bear in mind that much tourism in non-commercial accommodation is not registered and that the real numbers are much higher.

Table 4
Share of tourist arrivals, overnight stays and tourist beds in Croatia in 2019 and 2020, by type of accommodation.

Accommodation	Tourist arrivals		Overnight stays		Tourist beds	
	2019.	2020.	2019.	2020.	2019.	2020.
Hotels	37.1	25.8	26.2	16.3	14.4	14.8
Campsites	15.8	18.4	21.3	21.6	20.7	21.4
Private households	36.9	46.2	43.9	54.0	52.1	51.6
Agritourism	0.2	0.3	0.1	0.2	0.2	0.2
Other	10.0	9.4	8.5	7.9	12.6	11.9
Total commercial	97.2	93.8	87.5	79.2	70.8	68.5
Non-commercial	2.8	6.2	12.5	20.8	29.2	31.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: CTB (2020b).

4. Concluding considerations

The early research on the relations between tourism and the COVID-19 pandemic has already brought a vast body of work on historical examples of pandemics and their economic and social consequences, lessons learned, strategies of recovery, and the raised the dilemma 'between going back to business as usual' and developing new, more sustainable ways of post-pandemic tourism. First assessments of the pandemic impact on tourism predicted a considerable decline in all tourism parameters worldwide. And Croatian numbers mirror global processes and trends. Two groups of factors have been recognized as affecting the processes, trends and perhaps future trajectories of tourism in a pandemic. The first is related to global mobility and travel bans and restrictions. As tourism is all about movement from and to a place or region, the impact of a massive decline in all kinds of mobility and travelling – from intra- and interregional, to international and global – is, unsurprisingly, fundamental. Also, especially in periods of lockdowns, all activities and businesses that are considered 'unnecessary', which largely include the leisure industry and all services aligned with tourism, were cancelled or shut and found themselves in the least favourable position (to put it mildly). The second group of factors relates to personal responses. It includes changes in motivations and behaviour, enhanced by the necessity and need to keep distance in order to prevent spreading (and catching) the disease. These changes had (and still have) a deep impact on some structural features, particularly on the choice of destination. They are exemplified by the preference for isolated places in nature or peaceful empty rural areas, places of solace and respite, far from the urban crowd, by the choice of type of accommodation by choosing private holiday houses and villas or camping resorts, or by a kind of tourism that values elements of escapism and slowness movement over conventional pleasures. These movements are not entirely new, but the pandemic seems to appear as a catalyst for their more prominent position.

The results of our research, based on currently available data, reveal changes that occurred in 2020 compared to the preceding year due to the COVID-19 pandemic and concerned seasonality, the spatial distribution of tourism, the average stay, organization of arrival, age, origin and type of accommodation used. Today is not yet the moment to assess and to know the post-covidian trajectories of tourism, but it is possible to see some newly emerged or accentuated trends that have received a strong input from the pandemic. These trends of mostly individually oriented travels and stay, more prone to either pristine nature (e.g. rising popularity of hiking trails) or natural and traditional rural areas, pushed primarily by need to stay away from infection hotspots but also from physical (and/or mental) crowd may show some possible paths to follow and give them more attention and strength in the future within the context of sustainability. Croatia, with its exquisite, but also fragile natural environment, especially in Mediterranean karst area as the main destination area, certainly cannot support further development line of massive tourism. The path of sustainability has to acknowledge and to take into account trends that were accentuated in COVID-19 year and to build from that points toward tourism that is more environmentally friendly, both in terms of travel and accommodation, as well as to give more importance to local communities in terms of their inclusion in the economy. Slow travel and tourism are based on living in and with the local area and traditional values of the space. That is especially important to consider in order to meet both the environmental and social sustainability. As said in the introduction, pre-covidian tourism has largely been far from sustainable and it would not be the best option to go back to business as usual. So, this is the chance to learn the lessons from new trends of tourism in this pandemic and to draw the best of it for a future more sustainable tourism.

CRediT authorship contribution statement

Ivan Šulc: Conceptualization, Methodology, Validation, Formal analysis, Investigation, Resources, Writing - original draft, Writing - review & editing, Visualization. **Borna Fuerst-Bjeliš:** Conceptualization, Methodology, Validation, Investigation, Resources, Writing - original draft, Writing - review & editing.

Declaration of Competing Interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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