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**EVALUATION OF THE POSSIBILITIES OF RURAL TOURISM
DEVELOPMENT IN EASTERN CROATIA**

**VALORIZACIJA MOGUĆNOSTI RAZVOJA RURALNOG TURIZMA
U ISTOČNOJ HRVATSKOJ**

ABSTRACT

Based on numerous former researches of tourism development in Eastern Croatia, the aim of this paper is to critically analyze various development possibilities of this region. Also, the aim is to evaluate the potential types and special interest tourism, which have the biggest opportunities for future tourism development.

The emphasis in this paper is put on various forms of rural tourism which could be developed jointly with urban tourism, by using a common strategy. Namely, urban tourism in Eastern Croatia has reached a certain development stage, especially in the biggest cities.

Even though this area is rich in various attractive natural resources, alongside cultural and historical heritage of high value, the former tourism development was far behind other regions, especially Adriatic region. According to the official tourism data, this region (consisted out of five counties), disposes with modest 0.7% in the total number of Croatia commercial accommodation facilities, and its share of overnight stays 0.5%, which is far below the real potentials.

In this paper the reasons of inadequate tourism development are analyzed, the critical evaluation of the development of the existing tourism capacities is provided and the potentials of future tourism development in this region are analyzed. By using the SWOT analysis, the strengths, weaknesses, opportunities and threats of the future urban and rural tourism development in Eastern Croatia are analyzed.

Therefore, the aim of this paper is to critically analyze the former tourism development and to provide certain guidelines for its future development in this region. The main hypothesis in this paper is that rural tourism in Eastern Croatia can be successfully developed jointly with urban and other special interest tourism, and that it could be economically sustainable. After the Republic of Croatia joins the EU, new market possibilities will occur, as well as the new sources of financing the development of various forms of rural and urban tourism. This is pointed out in the new Strategy of tourism development in Croatia, in which the rural tourism is treated as one of the strategic directions of tourism development in Croatia. This paper points out the authors' understandings that rural tourism together with urban tourism can be the driver of the total tourism development in Eastern Croatia.

For the purpose of this paper the method of desk research was used. All relevant scientific and professional papers by domestic and foreign authors related to the research topic were studied. The results were interpreted by using the methods of comparative analysis, economic analysis and the method of description.

Key words: rural tourism, economic sustainability of rural tourism, Eastern Croatia

SAŽETAK

Polazeći od brojnih dosadašnjih istraživanja o razvoju turizma na području Istočne Hrvatske u radu se kritički analiziraju različite mogućnosti razvoja te se daje ocjena potencijalnih vrsta i oblika turizma, koje imaju najveće potencijale za budući razvoj turizma.

Težište se stavlja na različite oblike ruralnog turizma koje je moguće razvijati zajedničkom strategijom s urbanim turizmom koji je već danas dosega određenu razinu razvoja poglavito u većim gradovima ove regije.

Iako je područje Istočne Hrvatske bogato raznolikim atraktivnim prirodnim resursima, kao i kulturno-povijesnom baštinom visoke vrijednosti, dosadašnji razvoj turizma obilato je zaostajao za drugim regijama, posebno jadranskom turističkom regijom. Prema službenim statističkim podacima za 2011. godinu ova regija, koja obuhvaća pet županija, raspolaže sa skromnih 0,6% komercijalnih smještajnih kapaciteta u kojima se ostvaruje 0,5% noćenja u Hrvatskoj, što je daleko ispod stvarnih mogućnosti.

U radu se analiziraju razlozi neadekvatnog razvoja turizma, daje se kritička ocjena razvoja postojećih turističkih kapaciteta, te se analiziraju potencijali budućeg razvoja turizma u ovoj regiji. Pomoću SWOT analize valoriziraju se snage, slabosti, prilike i prijetnje budućeg razvoja urbanog i ruralnog turizma u regiji Istočna Hrvatska.

Stoga je cilj ovog rada kritički analizirati dosadašnji razvoj turizma te dati određene smjernice za budući razvoj u ovoj regiji.

Polazna hipoteza u ovom radu je da se ruralni turizam u regiji Istočne Hrvatske može uspješno razvijati zajedno s urbanim i ostalim komplementarnim oblicima turizma te da može biti ekonomski održiv.

Ulaskom Hrvatske u EU ostvarit će se nove tržišne mogućnosti kao i novi izvori ulaganja u različite oblike ruralnog i urbanog turizma.

Na to upućuje nova Strategija razvoja turizma u Hrvatskoj u kojoj se ruralni turizam tretira kao jedan od strateških pravaca razvoja hrvatskog turizma.

U radu se prezentiraju spoznaje autora da ruralni turizam zajedno s urbanim turizmom može biti pokretač razvoja ukupnog turizma u Istočnoj Hrvatskoj.

U radu je primijenjena metoda istraživanja za stolom tzv. desk research pri čemu je proučena sva relevantna domaća i strana stručna i znanstvena literatura o temi istraživanja, a rezultati su interpretirani korištenjem metode komparativne analize, ekonomske analize te metode deskripcije.

Ključne riječi: ruralni turizam, ekonomska održivost ruralnog turizma, Istočna Hrvatska

1. Introduction

Economic development of the Eastern Croatia during the last 20 years is more and more left behind the economic development of the other Croatian regions, especially of the City of Zagreb and its surrounding and coastal regions of Istria and Kvarner. This can be analyzed through several economic indicators, such as the size of the GDP, unemployment rate, etc. The same trend is noticeable in the field of tourism and complementary activities (agriculture, industry, construction, etc.). In this paper the area of Eastern Croatia is treated as a unique, recognized region with certain characteristics, even though it is not officially defined as a region. The former tourism development in this region has resulted with modest results in relation to the overall tourism development in the Republic of Croatia. Even though this region has a 22% share in the total area of the country, in the context of tourism it has a modest 0.7% share in commercial accommodation capacities and registers only 0.5% of the total number of overnight stays, which is far below its real potentials. There are numerous reasons of poor tourism development of this area. During the last 50 years investments in tourism development have mainly been focused on coastal Croatia, while investments in rural tourism were left behind. Therefore it is not surprising that today more than 85% of tourism turnover is registered in coastal region and the rest is registered in the city of Zagreb and its surroundings, as well as in the north-west part of Croatia.

The growth potentials of this region are known for a long time. They arise from its rich natural resources - rich valleys, forests, rivers, lakes, favorable climate. Besides that, this area is rich in cultural heritage, traditional religious celebrations, culinary tradition, etc. This cultural richness has affected the development of cities and villages in urban areas, where urban tourism is being developed. This is encouraged also with new road infrastructure which has connected eastern part of Croatia with its other parts, as well as with neighboring countries.

All of these potentials can be considered as drivers of development of special interest tourism, like rural, gastronomy, wine, cultural, sports, health, religious, eco, hunting and fishing, etc. (Bartoluci, 2013:192-210). All these forms can be developed within the scope of urban and rural tourism and excursions. After Croatia joins the EU, new market potentials will occur, which should lead to new investments, employment and encouraging the total economic development of this region. Based on the SWOT analysis presented in the paper, certain guidelines for tourism development in this region are given.

2. Analysis of tourism development in the eastern Croatia for the period from 2002 to 2012

Even though this area is rich in attractive natural resources, as well as in the cultural heritage of high values, its present tourism development has been left far behind other regions, especially Adriatic region, where, for years now, more than 85% of Croatia tourism turnover is registered. According to the official statistic data for the year 2012, Eastern Croatia, consisting out of 5 counties (Brod-Posavina, Osijek-Baranja, Požega-Slavonia, Virovitica-Podravina and Vukovar-Srijem) is taking 22% of the whole Croatian territory (CBS, 2011) and disposes with only 0.7% of commercial accommodation capacities in which only 0.5% of overnight stays in Croatia is registered, which is far behind the real potentials (BIST, 2013). Out of 805,489 beds (the number statistically registered in Croatia in August 2012), the entire Eastern Croatia had only 5,286 beds, despite the dynamic growth trend during the last decade and 85% increase in volume (Table 1).

Table 1 Number of tourist arrivals and overnight stays in the Eastern Croatia in years 2002 and 2012

	2002.	2012.	Change index 2012./2002.
Eastern Croatia			
Tourist arrivals	96.440	149.332	154,8
Total number of overnight stays	213.331	312.806	146,6
Average stay (in days)	2,2	2,1	
Domestic tourists, overnight stays	158.938	218.983	137,8
International tourists, overnight stays	54.393	93.823	172,5
Share of international in the total number of overnight stays (%)	25,5	30,0	
Share of overnight stays during July and August (%)		17,0	
Number of beds	2.859	5.286	184,9
Share of Eastern Croatia in total number of overnight stays in Croatia (%)	0,48	0,50	
Share of Eastern Croatia in total number of beds in Croatia (%)	0,38	0,66	

Source: BIST, 2013

Due to the shorter stay of tourists in this region (2.1 days) in relation to the average stay in Croatia (5.3 days in 2012), its share in total tourism turnover is even more modest in relation to accommodation supply, and results in only 0.5%. Namely, in Eastern Croatia 149,322 tourists have registered 312,806 overnight stays in commercial accommodation capacities in 2012 (BIST, 2013). During the last decade the growth of tourism turnover in this region did not follow the dynamics of increase in accommodation capacities. The number of overnight stays has been increased by 47% during the period from 2002 to 2012 (BIST, 2013).

In the structure of accommodation capacities in this region hotels predominate with 2,294 beds (43.4% of total number) and they are the most used type of accommodation in the region, since they are annually used 80 days in average (182,792 overnight stays or 58.4% of total tourism turnover in 2012). Hotels are followed by lodgings (18.1%), rooms for renting (7.2%), private rooms (5.1%), resorts (4.8%), rural households (4.1%) and mountain homes, hunting lodges and similar types of accommodations. However, with the exception of hotels, all other capacities are in average underused. For instance, rural households are used only 31 days, private rooms 46 days, rooms for renting 59 days, etc. This affects the low average annual utility of all capacities in the Eastern Croatia (around 59 days), which is 19 days less than the relatively low accommodation utility in Croatia (78 days).

In relation to highly seasonal character of Croatian tourism, directed mainly to July and August, during that peak season, in Eastern Croatia only 17% of total overnight stays is registered. In this region tourism turnover is evenly distributed through the whole year, with the lowest share in February (4.3%), and the highest in September (11.6%) and May (10.9%). Such dynamics clearly stresses different motives of tourist arrival in this region, where urban, business, transit, health, rural, gastronomy, wine, hunting and fishing motives predominate, even though there is a lack of primary researches which would argument those results. Such situation is confirmed by significantly higher share of domestic tourists, with the share of 70% in the total number of overnight stays, in relation to their modest 8% share in total tourism turnover in Croatia. Among the meager number of international tourists in this region, the ones from Germany (3.9%), Italy (3%), Bosnia and Herzegovina (2.6%), Slovenia (2.5%) and Austria (2%) predominate.

The accommodation offer is geographically distributed in 88 out of 998 settlements of this region (CBS, 2011), with less than 20 beds in half of those settlements, which stresses the low level of quality of that offer (BIST, 2011). Two thirds of accommodation capacities is concentrated in countries' centers and bigger urban areas – Osijek, Vinkovci, Vukovar, Slavonski Brod, Orahovica, Lipovac, Bizovac (due to the health tourism), Požega, Đakovo and Našice. In those towns 38% of this region's inhabitants live (CBS, 2011). The hotel offer, predominately of the highest quality, is also concentrated in those 10 towns (23 out of 38 hotels are located there). Due to the fact that accommodation capacities are mainly concentrated in bigger towns of this region, they attract more tourists and register 70% of total overnights in this region (BIST, 2013). This data stresses out the fact that urban tourism is the most developed type of tourism in this region, regardless the motives of tourist arrivals in those towns, which for sure are primarily related to business activities, even though there is not much primary research to confirm this, either.

Rural tourism is developed outside the urban centers, as this area is rich in natural and cultural characteristics, with small number of inhabitants, where agricultural activities predominate and social structure and customs are partially preserved (Ružić, 2012:217). During the last couple of decades, in this region, as well as in the rest of the Croatia, the development of rural tourism was stimulated in the Eastern Croatia (Horwath Consulting, 2009:20-27), but also in some other Croatian regions. However, the offer of this special interest tourism is still not developed enough, is unevenly distributed, almost in its initial phase of development (Kušen, 2006:168). At the same time, rural tourism in some other European countries has been developed much more successfully, thanks to the public support of its development (Krajnović, Čičin-Šajn, Predovan, 2011:33). In Croatia, rural tourism faces undeveloped domestic demand and unfavorable business environment, is being developed much too slowly, with the exception of few counties (Strategija razvoja turizma RH do 2020. Godin 2013:9). The biggest tourism receiving, but also tourism generating rural tourism markets in Europe are France, Germany, Austria, Great Britain and Italy. Altogether they make around 80% of total rural tourism market in Europe (Horwath Consulting, 2009:27).

It should be emphasized that official statistic data do not provide the realistic insight into the current state of rural tourism and therefore it is necessary to consult various sources of data, if one wants to analyze the real state (data published by the CBS, Croatian Chamber of Economy -CCE, internet sites of tourism boards of the counties, etc.). Namely, CBS registers data only for rural households which provide accommodation services (starting from the year 2004), while the Department of Tourism of the CCE additionally registers tourist rural family households that provide food and beverages, and also the same-day visitors. Besides, it should be mentioned that in that offer also wine cellars, tasting rooms and similar object are taken into account. However, primary research conducted in Bjelovar-Bilogora County pointed out that a certain number of such objects is moonlighting. As the main reasons for such state they named unfavorable economic situation caused by economic crises and recession in the country (Tominac, 2011:26). Due to the unequal criteria, it is extremely difficult to determine the realistic level of rural tourism offer development in a certain area.

Rural tourism in Eastern Croatia accounts for 33 rural households with 219 beds, or 4.1% of total accommodation capacities. Compared with the year 2004, when the first three rural households in Osijek-Baranja County started their business, their number in this region has been increased by 73 times, which empathizes a dynamic growth trend (Table 2). Even though this type of accommodation in Croatia at the beginning has been dynamically developed in Istria, during the last couple of years their number in Istria has been decreased, while at the same time in Eastern Croatia it has been increasing. For a long period of time rural tourism in Istria county was the most developed and the only one competitive on the European tourism market, if the number of accommodation facilities, their arrangement and equipment, exterior design, the level of services, presentation and promotion are taken into account (Kušen and Hendija, 2005:19). However, the

case of Istria proves that all that is not enough for rural tourism to be developed, even though this region has started with development and evaluation of agritourism households, using subsidies and incentives provided by public sector. Namely, most of the Istrian agritourism households today is either closed or is doing business at the edge of profitability (Krajnović, Čičin-Šajn, Predovan, 2011:31). Statistic data go in favor of this statement, as the number of households has decreased from 16 in 2009 to 9 in 2012 (BIST, 2013). In Croatia there are also large spatial differences in the level of development of tourist rural family households. It is quite symptomatic that the biggest number of those households is concentrated in two most developed counties in terms of tourism (Istra and Dubrovnik-Neretva). This emphasizes the fact that rural tourism demand consists mostly of international tourists in the search for authentic products (Jelinčić, 2007:287), while in the Eastern Croatia domestic guests predominate, mostly same-day visitors and excursionists.

The similar experiences with developing rural tourism have been registered on Cyprus, where the development of this special interest has been stimulated using the EU funds, with the goal to decrease the dependence on “sun and sea” product, which is a situation quite similar to the one in Croatia. Namely, even today Croatia is a typical example of mature tourism destination with only one product dominating (“sun and sea”), with high seasonal character of business operations (Strategija razvoja turizma u RH do 2020. god., 2013:19). Using the case of Cyprus, Sharpley has proved that in all those countries in which rural tourism is competing with leisure tourism, it has weak chances to become developed. By conducting market research he has proved a weak economic profitability of investing solely into rural tourism due to the low utilization of those capacities, weak interest shown by the demand (especially international), relatively high prices in relation to some other accommodation capacities which tourists traditionally find more attractive, and which are located in coastal tourism destinations, as well as numerous other reasons (Sharpley, 2002:236). The research has confirmed that on Cyprus these objects are mostly used during weekends in warmer part of the year, which is certainly not enough for them to be economically profitable. On the other has, economic and broader social positive effect of rural tourism development are unquestionable and scientifically proved through numerous researches (UNWTO, 2004:14; Fleisher, Pizam, 1997:368; Franić, Grgić, 2002:133, Kušen, 2006:170 and other authors).

Table 2: Rural tourism offer development in Eastern Croatia in the years 2007 and 2012 (based on various data sources)

				Eastern Croatia	Istria County	Other counties	CROATIA IN TOTAL
Tourist rural family households	2007	CCE		58	64	230	352
No. of beds	2007	CCE		192	253	441	886
Food services	2007	CCE		49	47	192	288
Tasting rooms	2007	CCE		5	35	167	207
No. of rural households	2007	CBS		5	17	10	32
No. of rooms and apartments	2007	CBS		16	68	55	139
No. of beds	2007	CBS		35	189	131	335
No. of rural households	2012	CBS		33	9	45	87
No. of rooms and apartments	2012	CBS		100	45	131	276
No. of beds	2012	CBS		219	103	298	620
Wine cellars/tasting rooms	2012	Internet		68	NA	NA	NA

Note: NA=not available

Source: CCE: Mišćin, Mađer, 2008:12; CBS; BIST, 2013; statistic data for August in the analyzed years; Internet: sites of five tourism boards of Eastern Croatia

In the year 2012 in the Eastern Croatia 33 rural households were officially registered for providing the accommodation services (BIST, 2013). However, according to the data published by the CCE, in the year 2007, 54 rural households have been providing food services or wine and other drinks tasting (CCE, 2008). By analyzing the internet sites of all five tourism boards in this region, it was determined that on the wine roads, in wine cellars, tasting rooms and similar objects such services are being offered in 68 facilities. Namely, the range of rural households engaged in rural tourism in Eastern Croatia is somewhere between 33 households (that provide accommodation services, additional to other services) to 58 rural households, according to the data published by the CCE and/or 68 wine cellars. All this stresses the nonsystematic state of rural tourism in this region.

One of the main advantages of rural tourism development is that simultaneously it is possible to develop some other special interest tourism, like cultural, adventure, sports, hunting, fishing, religious, health, gastronomy, wine, eco, shopping, etc. (Ružić, 2009:17; Kušen, 2006:171). Special opportunities are provided by excursions (both non-stationary and stationary), which are related to religious motives, weddings, fairs, culinary ceremonies and similar events, but also family celebrations. For rural tourism to be more intensively developed, special programs should be created and promoted, together with some authentic tourism products of this regions, which should be branded (ham, wines, etc.) and promoted on the EU market.

In the Croatian tourism development strategy it is highlighted that, globally, the growth trend of rural tourism is very dynamic (in average, 6% rate annually). Also, even more optimistic are stands about the development of gastronomy and wine offer in Croatia. The available researches point out that around 160,000 of Croatian inhabitants visit wine roads, where 61% of them buy local wines, and 63% local food products. Unlike mentioned special interest tourism which are barely recognized even in the terms of domestic tourism demand market, urban tourism has a power to attract significant number of international tourists (Strategija razvoja turizma u RH do 2020. god., 2013:9).

3. SWOT analysis of rural tourism development in the Eastern Croatia

In Eastern Croatia it is possible to list numerous natural and social resources which make it recognizable, unique and, above all, abundant region not only in terms of Croatia, but also internationally. Ministry of Culture of the Republic of Croatia (2013) has protected numerous intangible cultural properties in this region, in order to preserve traditions not only in folklore, but also traditional characteristics in crafts, language, gastronomy, etc. About 20% of total number of protected intangible cultural properties in Croatia is located on its very east. Also, out of 8 preventively protected intangible cultural properties in Croatia, two of them (25%) are located in this region (Ministry of Culture, 2013). When it comes to financing the protection of these properties, the same Ministry has allocated 23.8% of total financial resources intended for this purpose to this region. This data clarifies that the institutions have recognized the importance of this region and its heritage, while at the same time local authorities have become actively involved in the process of applying for the resources allocation and creating high quality projects.

As for the tangible heritage, a little more than 13% of the total number of protected tangible goods in Croatia is located in this region (Ministry of Culture, 2013). This refers to the churches, archaeological sites, monasteries, schools, etc. All these properties are located across this region, creating an unquestionably crucial part of cultural tourism offer. However, all of these properties could and most definitely should be included into the offer of other special interest tourism which should be more actively developed in this region. Also, when it comes to state supports to these goods, around 18% of total resources are relocated into this region (Ministry of Culture, 2013). Cultural heritage of this region is an extremely high potential for tourism development because it can be integrated into different forms of tourism offer and can be used as a strong pull factor in

order to attract different market segments. If incorporated into the offer correctly, these resources should have influence of lengthening the average stay of tourists in this region.

On the other hand, natural resources in this region are equally attractive and also have high level of quality. Many of the resources are officially protected at national level. To name just an example, Nature Park Kopački rit registered 32,111 visitors in 2011 (CBS, 2012), predominately domestic tourists. There are numerous other natural beauties in this region which could be used more actively in tourism offer of this region and which could increase the attractiveness of tourism product, like valleys, forests, rivers, etc. They could be used primarily in sports and health tourism, but also in many other special interest tourism. However, all the potentials of this region are elaborated through SWOT analysis, whose results are listed in Table 3.

Table 3 Analysis of urban and rural tourism development possibilities in Eastern Croatia

RURAL AND URBAN TOURISM IN EASTERN CROATIA	
STRENGTHS	WEAKNESSES
<p>Natural predispositions of development due to the traditional focus on agriculture</p> <p>Tradition of living in villages</p> <p>Climate preferences</p> <p>Diversity and richness of natural and especially social resources in cities</p> <p>Distinct hospitality of local community</p> <p>Ecological preservation of destinations</p> <p>Entrepreneurial activity in creating new activities</p> <p>Developed and rich authentic gastronomy and wine offer</p>	<p>Scrapped rural tourism offer</p> <p>Weak level of education of local entrepreneurs involved in rural tourism development</p> <p>Dependence on domestic guests and excursionists</p> <p>Preservation of environment</p> <p>Lack of ideas for diversification and enriching products</p>
OPPORTUNITIES	STRENGTHS
<p>Possibilities of using EU funds for rural tourism development after Croatia becomes a member of the EU, since it stimulates the development of rural tourism</p> <p>Distinct differentiated offer intended for individuals, not mass tourism demand market</p> <p>Foreign capital interest</p> <p>Introducing European standards</p> <p>Constant growth of tourism demand, new segments and new markets</p> <p>Repositioning the Croatian tourism, recognizable image</p> <p>Increasing service quality</p> <p>Increased interest of individual guests</p> <p>Healthy food and high quality wines</p> <p>Competitiveness of new products</p> <p>Connection between rural tourism and other types of tourism, especially urban tourism</p>	<p>Fierce competition with already developed rural tourism destinations in competitive environment (Hungary, Slovenia, Austria, etc.)</p> <p>Conflict of interest between providing services to tourists and original agriculture production</p> <p>Impossibility of fast adaptation to variable tourism needs</p> <p>Slow construction of tourism infrastructure, due to the lack of financial resources</p> <p>Weak economic effects due to the lack of demand in order to cover initial investments</p>

Source: authors' research

Therefore Croatian rural tourism needs to be estimated based on objective possibilities of its future development and demand trends on both domestic and international tourism market, rather than on the critical volume of the existing offer (Kušen, 2006:168). Rural tourism development needs to be bided with urban tourism development and its accommodation and other capacities which are not being used enough. This requires special development concept with determined goals, stakeholders, investment plans and development projects for each site.

4. Conclusion

Based on the conducted research it is possible to stress out the state and determinants of tourism development in the Eastern Croatia.

The analysis has showed that tourism in this region is significantly lagging behind the development in other areas in Croatia, especially tourism in Adriatic region. Urban tourism is the most developed type of tourism in this region, with the biggest number of hotels and other accommodation capacities, even though they also achieve relatively modest economic effects. The main motive of tourist arrivals are business, health, gastronomy, wine, hunting and fishing tourism, which create recognizable special interest tourism. In other parts of this region, where 38% of inhabitants live, around one third of accommodation capacities is located, which certainly cannot be enough to attract significant tourist arrivals, or economic effects.

Even though during the last couple of years several incentives were used to stimulate the rural tourism development, it is still quite weakly developed, compared with some other European countries and in relation to the potentials of its development. The advantages of rural tourism can be found in the possibilities of special interest tourism development, which is also emphasized in the new Strategy of Croatian tourism development. The future rural tourism development should be estimated based on objective possibilities of his future development and demand trends, on both domestic and European market.

Rural tourism development could potentially be more intensively related to urban tourism development by additional tourism offer, since urban tourism has high quality accommodation and other capacities which are relatively poorly used. In order to develop tourism of Eastern Croatia more intensively, it is necessary to create development concept with clearly defined goals, possibilities and investment plans at regional, but also national level.

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