

The Development of Tourism in Istria

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Ahead of the fall of the Iron Curtain, the Northern Adriatic, the area then shared by Yugoslavia and Italy, made headlines in European geopolitics and economy. In the post-WW2 era, it sparked conflicts followed by a co-operation between communistic and democratic societies, became the main economic gateway of East-Central Europe through the wide inland ports (Trieste, Koper and Rijeka), and became a major Mediterranean tourist destination with numerous resorts. Thus, it is a manufacturing site, transshipment area and playground at the same time. In the second half of the 20th century, tourism growth set new goals for the region. Instead of competition and rivalry, complementarities and natural and cultural protection on regional and nation-state levels are 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 destination of leisure. In the 19th and the early 20th centuries, nobility and intellectuals became acquainted with the geography of the peninsula, the Austrian and Venetian heritage, and the multi-national Romance, Slavic and Germanic environments. At the dawn of the 21st century, development of tourism, tourist visits, and their impact on societies and cultural landscapes can be compared to Costa Brava and other tourist areas of the Mediterranean.

Key Words: tourism, Istria, Slovenia, Croatia

INTRODUCTION

Contemporary Geography of the Northern Adriatic

The Northern Adriatic is most often identified with the Italian provinces of Friuli Venetia-Giulia (26,209 km²), the Slovenian littoral region of Primorska (3,369 km²) and the northern Croatian littoral – Istria and the Kvarner (5,650 km²). The region is a part of the Mediterranean basin stretching on the eastern, northern, and

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western sides of the Venetian Bay of the Adriatic Sea. The length of the coast goes in favor of 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 like Cortina d’Ampezzo, Tarvisio, Kranjska gora and Bovec, matching therewith the many littoral touristic centers – aligning the coast from Venice and the Venetian Lido’s 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, the eastern coast includes high limestone cliffs and in the westerly direction lowering karstic plains and hills. Water resources depend 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 northeasterly winds (bora) have, along with the cultural tradition, had an impact on the built environment (roofs), resulting in a unique culinary specialty (wind dried ham). Transshipment and tourism bring major revenues to the region. The Italian region Veneto and the municipality of Venice are leading in tourism visits (9.5 million visitors annually, 65%); the County of Istria (2.6 million, 17.8%), with its leading tourist municipality Poreč, is next in significance. Other areas of the region, like the Italian Friuli-Venetia Giulia (1.8 million, 12.3%) and the Slovenian 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 areas of the European Mediterranean.

Istria is the major peninsula of the Northern Adriatic and the Adriatic Sea. The size of the peninsula is around 3.560 km², of which 2820 sq. kilometers (79.2%) are within the borders of the nation-state of Croatia; the Slovenian part of the peninsula encompasses 349 km² (9.8%) and the Italian part 391 km² (10.9%). The highest peak of the region is the Croatian Učka – in Italian: Monte Maggiore (1.396 m), located in the most easterly part of the peninsula. The karstic plains and coastal ridges enable farming, which is contem-



porarily leaning towards typical crops of the Mediterranean (wine, olives) at the expense of traditional grain-production. Consumers of agricultural products are, to a high extent, regional touristic enterprises: hotels and restaurants. The Istrian coast has four major urban areas, consisting of ports where manufacturing and trans-shipment takes place – Trieste in Italy (annual cargo tonnage – ACT: 37.4 million), Koper in Slovenia (ACT: 15.7 million), Rijeka (ACT: 10.2 million) and Pula (ACT: 2.7 million). Trieste and Koper are cruise-ship ports of call (around 110.000 passengers/year each), and Rijeka is the gateway for ferry-ships linking numerous Croatia islands (79 larger and around 525 smaller) with the mainland (250.00 passengers annually).

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Brief History of the Northern Adriatic

Istria has experienced several turning points in history. The Venetian Republic, which controlled much of the Northern Adriatic for almost 6 centuries, was conquered by Napoleon in 1797. After his final defeat in 1814, the Austrian Istria became a Habsburg/Austrian province. The Romance population remained the major ethnic group in the coastal towns, whereas the hinterland was largely in Slavic (Croatian and Slovenian) hands. The major city, the port of Trieste, showed an even bigger mix of nationalities, where 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 20th century, the region experienced the first of numerous leisure-oriented visits and the construction of adequate 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 than 25 years. After WW2, the winning Yugoslav communist partisans forced the re-negotiation of the post-WW1 border. In 1947, Winston Churchill's Szczecin-Trieste definition of the Iron Curtain topped the process of spatial and political fragmentation. After several provisional solutions, the 1954 London agreement followed, placing the port of Trieste and the immedi-

ate hinterland within the state of Italy, whereas the rest of Istria was transferred to the communist legislation 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 – turned into one of the most open borders between states of democratic and communist ideologies.

The Austrian infrastructure in tourism started to be re-used for its initial purpose around 1960, and new tourism projects were commenced. 20 years later, Yugoslavia was placed among the 10 most visited countries of Europe by foreign tourists. Within the frame of 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 close geographic 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 new democratic and sovereign nation-states of Slovenia and Croatia. Now, at the dawn of the 21st century, as the post-WW2 and other disputes have been replaced through the European Union political frame (Italy, Slovenia and Croatia are EU members), cooperation in tourism again has a brighter vision. Croatia is among the richest countries of the Northern Adriatic, regarding natural and cultural heritage sites registered by the UNESCO. Slovenia's uniqueness lies in the diverse natural environments that can be approached within short distances.

THE HISTORY OF TOURISM IN ISTRIA

Tourism on the Istrian Peninsula has a long tradition. Development-wise, Istria can be compared with the Ligurian and French Riviera, but regarding recent trends and visits, a comparison with Costa Brava in Spain would be more appropriate. Already until 1845, the now-prominent Istrian tourist resort of Poreč offered a well-organized guiding service. In 1883, Opatija (German: Abbazia) was the second most visited resort among 195 resorts within Austro-



Hungary. Only the casino and spa resort of Karlovy Vary (German: Karlsbad) registered more visitors. In the year 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 4 million tourists, mostly German nationals (40%), followed by Italians, Austrians and British (Blažević 1996).

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Initiation of Tourism

Leisure in Istria was at first mostly popular among the nobility. In Opatija, visits by the Habsburgs, in particular by Kaiser Franz Joseph and his family, predated leisure stays by the Rumanian King Karol, the German Kaiser Wilhelm II, the Swedish King Oscar, and many others. The aristocratic trendsetters initiated a way of life, which became popular among intellectuals and the newly rich as well. Poets like Rainer Maria Rilke and Lord Byron and Nobel Prize winners Thomas Mann and Robert Koch visited Istrian localities often. In terms of the turn-of-the-century societal laws, winters and spring visits were more appreciated than the contemporary summer visits to the Mediterranean.

Tourism, as we know today, was introduced by the railways. Due to the construction of three railway lines, the Istrian peninsula became linked to the rest of Europe by easy and inexpensive transportation. The central Istrian rail line Trieste–Pula (Pola), the naval port of Austria, was predominantly of strategic importance, whereas railways in the east and west served tourists. The owner of the tracks Vienna–Trieste ‘Die Südbahn’ constructed a side-line from Pivka (St. Peter im Karst) to the harbor of Rijeka, serving therewith the interest of tourists, keen on visiting Opatija and the Südbahn’s luxurious hotel Kvarner on the eastern shores of Istria as well. 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 main 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 (Mann 1995, 10):

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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.

After WW1, investment in tourism and tourism growth contracted, given the competition of regions within Italy. Equally, a steeply declining trend can be observed in the first 20 years after WW2. The communist regime (of Yugoslavia) looked upon tourism as a remnant of the bourgeois pre-war period and hindered attempts of local communities in Istria to make 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 costs to them. As in Spain under Generalissimo Franco, in Yugoslavia, under Josip Broz – Tito, the 1960's saw the initiation of several new developments in tourism. Being a leading member of the non-allied



movement, Yugoslavia gained almost unrestricted support of the UN (United Nations) as 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). This change affected Istria greatly. [161]

Towards Sun, Sea and Sand Tourism Destination

In the mid-1980's, Istria had an average of 30 million bed-nights a year, therewith becoming – together with the Mediterranean coasts of Spain – one of the most popular Sun, Sea and Sand destination of the Mediterranean. The contemporary image of Istria, being a Sun, Sea and Sand Mediterranean destination was completed in 1975. The major results of the construction era of the 1960's and 1970's are mega-hotels and resorts in Portorož (St. Bernardin), in Poreč (Plava laguna, Zelena laguna), Umag (Polynesia), Pula (Veruda), Vrsar (Anita) and Rabac. 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, in 1985 became the top dog in the Istrian resorts pack. On the other hand, Opatija's 2.5 million a year bed-nights placed the once leading resort well below the Istrian and Mediterranean average (Gosar 2001).

CONTEMPORARY NATIONAL TOURISM STRATEGIES

Tourism Strategy of Sovereign Nation-States

Within Yugoslavia, until 1991, the tourism strategy on the Istrian peninsula consisted of one, interdependent area. The co-operation between Slovenia's tour-operators, travel enterprises and the Croatian accommodation amenities in Istria was on the highest level. An excellent relationship and a good interdependent working environment could also be achieved due to the fact that 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 Glob-tour, dominated the tourist market of Istria, offering excursions

TABLE 1 Number of Tourist Beds in Slovene and Croatian Istria in Relation to the National Level (in thousands)

Region	2010		2005		1995		1985	
	(1)	(2)	(1)	(2)	(1)	(2)	(1)	(2)
Coast and the Karst*	25	11	22	12	22	10	27	8
Other Slovenia	93	37	57	24	51	19	56	22
Slovenia	118	48	79	36	73	29	83	30
County of Istria	246	—	230	88	215	74	235	92
Other coastal counties**	632	—	218	119	170	115	320	161
Other Croatia	32	—	243	18	224	17	265	38
Croatia	910	—	691	225	609	206	820	291

NOTES (1) total, (2) in hotels. * Includes municipalities Divača, Hrpelje-Kozina, Izola, Komen, Koper, Piran, Sežana. ** Includes counties Primorje-Gorski kotar, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia, Dubrovnik-Neretva. Adapted from Državni zavod za statistiku Republike Hrvatske (2011) and Statistični urad Republike Slovenije (2011).

TABLE 2 Tourist Arrivals in Croatian and Slovene Istria in Relation to the National Level (in thousands)

Region	2010		2005		1995		1985	
	(1)	(2)	(1)	(2)	(1)	(2)	(1)	(2)
Coast and the Karst*	614	348	516	271	405	188	537	294
Other Slovenia	2392	1521	1441	818	1171	544	2216	762
Slovenia	3006	1869	1957	1089	1576	732	2753	1056
County of Istria	2628	2467	2162	2016	893	685	2325	1464
Other coastal counties**	6781	5896	3937	3268	1061	466	5587	3283
Other Croatia	1195	748	1037	547	484	173	2213	812
Croatia	10604	9111	7136	5831	2438	1324	10125	5559

NOTES (1) all, (2) foreign. * Includes municipalities Divača, Hrpelje-Kozina, Izola, Komen, Koper, Piran, Sežana. ** Includes counties Primorje-Gorski kotar, Lika-Senj, Zadar, Šibenik-Knin, Split-Dalmatia, Dubrovnik-Neretva. Adapted from Državni zavod za statistiku Republike Hrvatske (2011) and Statistični urad Republike Slovenije (2011).

and serving as the middle-man between hotel/accommodation businesses and 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 airlines of former Yu-



goslavia, the Slovenian Adria Airways handled close to 75% of arriving and departing passengers from the above airports. Yugoslavia, with numerous coastal and island resorts such as Istria, Dalmatia and Montenegro, was in the mid 80's, among the five leading European airline inbound tourist destinations (Gosar 1989).

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As of June 25, 1991 both Slovenia and Croatia declared independence and sealed their territories with a (yet undefined) border. Cooperation 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 neighboring state but, due to lack of business, their headquarters too. In hotels in Slovenian and Croatian Istria, a lack of 'all-inclusive' tourists (who normally 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 the new geopolitical and, consequently, economic realities. Not only did the break-up of Yugoslavia produce several independent states, it also induced violence for several years in the region – between 1991–1995 (Croatia, Bosnia and Herzegovina) and in 1999 (Kosovo) –, and, at the same time, changed the mainframe of the economy: from socialist central planning 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, have been produced, often with the assistance of international experts. The tourism strategy of Slovenia was produced in 1992 (Sirše, Stroj Vrtačnik and Pobega 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

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has rightfully claimed the name the 'Watering Place of Central Europe.' Istria's Mediterranean coast in Slovenia has not been seen as a source for the sun, sea and sand tourism (anymore); instead, a great opportunity was sought in the geopolitical fact of being the closest neighbor to the gaming and gambling loving population of the Italian nation-state. In the pre- and post-independence period, Slovenian entrepreneurs opened 5 Las Vegas style casino establishments along the Italo-Slovene border (with 10 all-together in the young nation-state of Slovenia). The tourism strategy supported this trend. For Istria and the tourist area 'Coast and the Karst' the strategy suggested, in addition, the development of conference centers and event tourism (Sirše and Mihalič 1999). Near the Mediterranean beaches, in-door tropical landscapes and aquaparks 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 of 3 traditional spas-resorts (Krapinske, Tuheljske and Stubičke toplice) the 85 remaining 'major tourist resort' (group A) are located on the Adriatic Sea. The following 14 tourist resorts of Istria are named: Opatija, Ičići, Lovran, Medveja, Mošćenička Draga, Rabac, Medulin, Pula, Rovinj, Vrsar, Funtana, Poreč, Novigrad and Umag ('Zakon o krajevima sa turističkim potencialima' 1994). Despite its traditional view on tourism, the Croatian development plan foresees several human-made or induced attractions, which would supplement the abundance of Mediterranean nature. Water-oriented sports like sailing, motorboat yachting, surfing and snorkeling are already booming in Croatian Adriatic resorts. Other sports, like tennis, horseback riding and golf have made way into traditional fisherman's villages too. 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, playing grounds and beaches), thereby becoming legally independent. Due



to the economic problems of the communist past the financial value of those small units was at this point at a minimum. The consequences were fictitious bankruptcies, which puts those companies into hands of well-informed individuals, often politicians. For a short period of time state-owned banks became owners of these 'insolvent' companies. Selling the assets to the best bidder, local or international consortium, investment group, hotel-chain or tour operator was the next step in this transition process. In Croatia's Istria foreign investors were eager to settle down:

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- 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 got 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 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 Hypo-Adria Bank investment, in 2008 finally resulted in the opening of Kempinski Adriatic Resort and Golf Course (Šuligoj 2001).

In Slovenian Istria, transition followed the path as described above. But foreign investors were hindered, to some degree, by investing in the Slovenian tourist infrastructure. Good standing domestic firms, like publishing houses, pharmaceutical firms, automotive companies, etc., have shown interest in becoming owners. Profit made in their basic business was invested into hotels, marinas, aquaparks and other real estate and management of the industry:

- The spa 'Terme Čatež' invested in hotels in the port-town of Koper. Hotels gained in-door and out-door freshwater and saltwater pools, a swimming delight in a fake tropical environment. The investment was made possible, because between

1990 and 2000, Slovenes were hindered in visiting their favorable Mediterranean resorts due to the war in Croatia, and have therefore found their own 'continental Adriatic' in watering places of their own country.

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- The pharmaceutical firm 'Krka,' first bought spa-resorts (Dolenjske toplice, Šmarješke toplice) and consequently the Mediterranean coastal resort Strunjan, re-arranging it to the standards of a wellness resort.
- The petrol and gas distributor 'Istrabenz' has an interest in the hotel infrastructure of Portorož, the largest Mediterranean tourist resort in Slovenia. The firm has a major say in the yacht harbor – marina and operates most of hotels ('Life Class Hotels') in town (Popit 2000).
- The Austrian Monarchy's 1906 hotel ruin Palace was renovated to 21st century hotel standards by the above-named petrol distributor and in 2008 it was sold to the Kempinski group of hotels (Šuligoj 2000b).

CONTEMPORARY TOURISM IN ISTRIA

Istrian tourism has a similar status in the economies of both countries. Slovenian Istria has 28% of the overall number of guest-beds of the state; in Croatia the number of guest-beds in Istria is 33% of the Croatian total. The amount of accommodation amenities has not changed dramatically. In fact, in several tourist resorts, the offer of the number of beds 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 during the last decade of the 20th century. Reconstruction of hotels, particularly in Slovenia, is therefore more common. But, if we compare the amount of Croatian Istria guest-amenities with the same in the Slovenian part of the region, a ratio of 1:10 is evident (90.5% in Istria of Croatia and 9.5% in Istria of Slovenia). In 2005, Slovenes were relatively better off in providing guest beds in hotels (41.7% hotel-beds in Slovenian Istria against 38.3% in Croatian Istria). Among motives to visit, new amenities related to gaming and gambling, cycling, tennis and golf as well as to



vine tasting (enology) and culinary pleasures are registered. In the first decade of the 21st century 'sun, sea and sand motives' intermingle with activity and action type of tourism in both nation-states.

Status of Tourism in Istria

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The number of available amenities has no relation to actual 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 winter. Slovenian hotels don't close their doors. In the peak-years of Croatian/Yugoslavian tourism (1980–1986), the relation of guest-visits to Istria was 23:77 in favor of other Croatian tourist regions. But, in 2000 Istria registered close to 1/3 of all visitors to Croatia (30.3%), becoming thereby the most profitable tourist region of the nation-state. The same can be said for Slovenia: in 1985, just 19.5% of all visits to Slovenia were in Istria, while in 2000 such visits amounted to 26.5%. Citizens of the neighboring EU countries, like Austrians and Italians (24%), consider Istria to be the playground in their own backyard and therefore make most visits. Germans are not far behind (23%) due to the fact that Bavaria is just four driving hours away (Statistični urad Republike Slovenije 2001).

Tourism growth, according to data of bed-nights and visits, reflects the political situation and the societal and economic transition, which took part in the last two decades. Istria's tourism reached its peak of visits in the year 1986. More than 30 million bed-nights were registered, almost 27 million 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 part 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, if compared to data of the mid-1980s. In the fourth year of independence, as the violent conflict in Croatia approached its end, Croatian Istria reg-

TABLE 3 Istria: Accommodation Amenities in Leading Tourist Resorts

Region	2005		1995		1985	
	(1)	(2)	(1)	(2)	(1)	(2)
Portorož	9.5	5.1	8.9	4.5	12.2	4.5
Piran	1.4	0.3	1.1	0.3	1.8	0.3
Strunjan	1.5	0.8	1.4	0.7	1.8	0.0
Izola	3.1	1.1	2.9	1.1	3.1	0.6
Koper	0.9	0.5	1.2	0.4	1.0	0.4
Ankaran	3.1	0.7	3.6	0.7	3.2	0.6
Slovene Istria*	21.8	9.1	22.1	10.6	23.1	7.5
Umag	29.6	12.1	27.7	11.3	46.2	18.8
Novigrad	9.1	1.8	8.5	1.7	10.4	2.1
Poreč	50.6	23.9	47.3	22.3	49.3	23.2
Vrsar	37.8	4.0	35.3	3.7	38.7	4.1
Rovinj	33.7	12.2	31.5	11.4	32.8	11.9
Pula	17.9	10.1	16.7	9.4	45.7	25.7
Rabac	10.1	5.8	9.4	5.4	11.4	6.3
Croatian Istria**	230.3	88.3	215.2	73.2	234.5	92.1

NOTES (1) total, (2) hotels. *The Tourist-region 'Obala in Kras' (The Coast and the Karst). **The Province of Istria (County of Istria). Adapted from Državni zavod za statistiku Republike Hrvatske (2011) and Statistični urad Republike Slovenije (2011).

istered just 31.1% of tourist visits in relation to those of 1986. In Slovenia, where the independence declaration on June 25, 2001 resulted in (just) 10 days of fierce fighting, Istrian tourism survived with a 28.6% reduction of visitors. Primarily due to geographic distance from war, Istria was better off in terms of visits compared to the rest of the nation.

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 'domestic tourists' are Croatian citizens only, whereas visitors from other parts of Ex-Yugoslavia, being



‘domestic’ until 1991, among them 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 not registered as ‘domestic’ (meaning Yugoslav) anymore but as guests from abroad. On the other hand, 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. Croatian Istria is the immediate vicinity, minutes away from Slovenian visitors’ homes. The absolute increase of ‘domestic’ – Slovene tourists in Slovenian Istria, and the absolute and relative increase of Slovene tourists (as ‘international visitors’) in Croatian Istria, as well as the general decline of the number of other international visitors, characterize the tourist statistics in both nation-states in the 1990’s. (Kerma, Koderman, and Salmič 2009). In 2005 Slovenian, and in 2010 Croatian, statistical accumulated data showed that visits and bed-nights in Istria have finally surpassed the peak figures registered in the mid-1980’s (table 4).

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The analyses of questionnaires TOMAS – Tourism Marketing Study, distributed among several thousand tourists in Croatian and Slovenian Istria in 1997, 2000 and 2004, have shown that the natural environment – the sea, the sun – with their human-made resources (dried ham, vine, casino) – 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 offerings (sports) which would increase the body’s adrenaline flow. According to TOMAS, Istria is a preferred region by tourists with a mid-sized budget, families with children, and by the age group between 20 and 40 years. The most probable origin of the average tourist in Istria is a nation-state in West- or East Central Europe (Mikačić 1994; Marušić 1997; Škafar et al. 1998).

In general, since 2000 a positive trend has been observed:

- In both parts of Istria, guests from neighboring regions and states of Central Europe (Venetian Italians, Austrians, Hun-

TABLE 4 Accommodation Amenities, Number of Tourist Arrivals and Nights in the Leading Tourist Resorts in Croatian and Slovene Istria in 2010

Region	Tourist beds			Tourist arrivals				Tourist nights			
	(1)	(2)	(1)	(1)	(2)	(3)	(4)	(1)	(2)	(3)	(4)
Labin	9.882	1,2	188.684	1,6	8.001	180.683	1.199.695	2,0	34.227	1.165.468	
Novigrad	9.814	1,1	143.723	1,3	4.506	139.217	760.295	1,3	13.198	747.097	
Vrsar	18.116	2,1	166.275	1,5	1.658	164.617	1.326.684	2,2	9.795	1.316.889	
Poreč	21.377	2,5	401.820	3,5	20.350	381.470	2.564.865	4,2	65.503	2.499.362	
Pula	15.127	1,8	228.090	2,0	34.738	193.352	1.197.231	2,0	98.840	1.098.391	
Rovinj	35.834	4,2	419.716	3,7	29.037	390.679	2.917.562	4,8	107.020	2.810.542	
Umag	19.710	2,3	348.942	3,0	29.895	319.047	1.752.310	2,9	117.435	1.634.875	
County Istria	233.613	27,4	2.895.686	25,3	175.300	2.720.386	19.095.401	31,6	717.532	18.377.869	
Croatia	853.407	100,0	11.455.677	100,0	1.529.003	9.926.674	60.354.275	100,0	5.602.970	54.751.305	
Izola	3.783	3,4	92.502	2,9	52.413	40.089	360.310	3,8	230.424	129.886	
Koper	4.654	4,2	93.290	2,9	56.832	36.458	329.945	3,5	221.961	107.984	
Piran	14.015	12,8	415.469	12,9	155.867	259.602	1.415.137	15,1	522.286	892.851	
Slovene Istria	22.452	20,5	601.261	18,7	265.112	336.149	2.105.392	22,4	974.671	1.130.721	
Slovenia	109.684	100,0	3.217.966	100,0	1.181.314	2.036.652	9.388.095	100,0	3.924.164	5.463.931	

NOTES (1) total, (2) share (%) within the frame of the nation-state, (3) domestic tourists, (4) foreign tourists.

Adapted from Državni zavod za statistiku Republike Hrvatske (2011) and Statistični urad Republike Slovenije (2011).

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TABLE 5 Numbers and Shares of Overnight Stays in Slovene and Croatian Istria by Countries of Residence in 2010

Region	Slovene Istria*		County of Istria		Total Istria	
	(1)	(2)	(1)	(2)	(1)	(2)
Austria	192.423	9,7	1.984.397	11,2	2.176.820	11,0
Bosnia and Herzegovina	7.113	0,4	61.695	0,3	68.808	0,3
Croatia	9.166	0,5	656.313	3,7	665.479	3,4
Czech Republic	21.834	1,1	642.032	3,6	663.866	3,4
France	15.465	0,8	235.553	1,3	251.018	1,3
Germany	144.161	7,3	5.258.053	29,7	5.402.214	27,4
Hungary	31.183	1,6	288.681	1,6	319.864	1,6
Italia	273.797	13,8	2.012.593	11,4	2.286.390	11,6
Netherlands	25.079	1,3	1.487.095	8,4	1.512.174	7,7
Other countries	228.023	11,5	2.147.467	12,1	2.375.490	12,1
Poland	16.262	0,8	385.864	2,2	402.126	2,0
Slovakia	12.248	0,6	195.784	1,1	208.032	1,1
Slovenia	977.842	49,4	2.048.378	11,6	3.026.220	15,4
United Kingdom	19.189	1,0	291.556	1,6	310.745	1,6
USA	7.356	0,4	36.420	0,2	43.776	0,2
Total	1.981.141	100,0	17.731.881	100,0	19.713.022	100,0

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NOTES (1) total, (2) share (%). *Includes (only) coastal municipalities Izola, Koper, Piran and not the Karst hinterland. Adapted from Državni zavod za statistiku Republike Hrvatske (2011) and Statistični urad Republike Slovenije (2011).

garians, Czechs, Slovaks, Bavarian Germans and Slovenes) dominate, in contrast with the pre-independence years, in which Germans, English and Dutch citizens of the Atlantic Europe made the bulk of visits.

- All-inclusive air-hotel arrangements are reduced in quantity; instead individual bookings and half-pension arrangement for motorists, made by travel agencies, are common in summer. Out-of-season visits by groups of closed societal 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-

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summer season (June, July, and August), as visitors prefer to stay one week or more (Poreč-Parenzo average: 6.8 days). To West-European naturist clubs well known resort of Vrsar-Koversada (7.9 days) and Rovinj-Rovigno (7.4 days) are leading.

- In Slovenian Istria, tourist visits in the peak-summer season equal the number of visits in other nine months of the year. The average visit lasts just 3.6 days, bringing to the foreground the fact that event tourism (congresses, meetings) and all-year long week-end tourism, particularly in gambling and aqua land environments, are general motives of 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 Mediterranean's major tourism destinations. Regarding the early contemporary tourism development (after 1960's) this tourism destination could be compared to Costa Brava, Spain. Since the partition of Yugoslavia into independent and sovereign nation-states (1991), 4/5 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 resulted in success in 2004, Croatia is joining the EU in 2013. In the past two decades (1990–2010) both tourist destinations, the Slovenian and Croatian Istria, have experienced an atypical tourism development cycle induced by:

- Ethnic disputes, conflicts and wars (which were fought in relatively distant areas – in Southern Croatia, Bosnia and Herzegovina and Kosovo);
- Transition from the socialist central planning to contemporary market economy;



- Division of the former federal state into sovereign entities.

The post-socialist transition period included the take-over of state-owned tourist infrastructure by banks, international consortiums and private owners. Due to diverse nation-state politics, tourism in Istria has become diversified. Local entrepreneurs in both countries, Slovenia and Croatia, now have a limited say in tourism management. In Croatia, international tourism enterprises, consortiums and banks dominate the market economy. In Slovenia, business, not initially related to tourism, such as pharmaceutical enterprises, publishing houses and tire producers, residing in the hinterland and nation-state capitol, 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 casino's, nautical and sport tourism, as well as inland vine and farm tourism, made great entry into the tourism industry of both countries.

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The once politically and economically unified area of Istria had to adapt to diverse national rules of law, tourism strategies and market economies. After a sharp decline in the 1990's tourist's and bed-night numbers, at the dawn of the 21st century, visits returned to the record numbers of the 1980's. But the structure of visitors has changed. British, Dutch and Scandinavians visits decreased as visits from the region, in particular from the neighboring countries Italy, Austria, Hungary, as well as Slovenia and Croatia increased. Slovenian and Croatian Istria has become a playground of the region.

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