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Transnational Strategy for the Sustainable Territorial Development of the Danube Area with special regard to Tourism DATOURWAY

Abstract

TOURISM SURVEY
Croatia



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Introduction

Tourism in the Danube area is becoming more and more popular in all the countries on its shores. One of the factors contributing such growth in tourism importance of the Danube area is general diversification of tourism offer, which includes also river cruises as especially important type of tourism activity for this region.

Another probably even more important element is general easement of border formalities and better security level in the area. This is caused as a consequence of Romania and Bulgaria joining European Union in 2007, but also by easement of border crossing regime between Serbia and European Union, i.e. recent suspension of visa regime for the citizens of Serbia for entering into European Union.

Such development is very supportive for all types of tourism and for all countries, because it enables important widening of tourism activities for the tourists coming in any of those countries and easier guidance of cruises through different countries. Actual strong growth of tourism in Croatian Danube area is definitely a consequence of afore mentioned processes and it is expected that it opens very good prospective for the future. It includes proposed suspension of border control between Croatia and Hungary few years after Croatian joining into European Union and in more distant future also with Serbia considering its policy of joining European Union too. The establishment of proposed Mura-Drava-Danube World Biosphere can also help tourism development and increase cross border co-operation between the countries on the Danube.

1. Tourism development resources

1.1. Natural resources

In the whole Croatian Danube area there are total 35 areas under various forms of natural protection, the most important and the largest being Kopački rit Nature park on the mouth of the rivers Drava and Danube. Due to strict rules in Croatian national parks not allowing commercial forestry and hunting, Kopački rit does not have a status of national park, although the level of protection is higher there than in national parks in Hungary, Italy and many other European countries.

Kopački rit has an area of 17.000 hectares and from the year 1993 is protected also as Ramsar site, the only in the area. This is one of the largest natural swamps in Europe, famous for numerous plant and animal species. The most important are birds, total 293 various species, but there are also 54 kinds of mammals, 44 kinds of birds etc. of The bird species include various kinds of storks, herons, spoonbills, eagles and mammals wild boars, red deer and beech marten. The biggest concentration of various animal species is special zoological reservation inside the nature park. In the table below, there is a list of large natural protected areas in the Danube Area.

Besides Kopački rit (both nature park and zoological reservation) there are eleven larger protected areas and 22 smaller protected areas, mostly parks. From the touristic point of view the most interesting are four protected landscapes Erdut, Spačva river area, Vuka river area and Virovi.

The most attractive is Erdut with loess sediments 70 meters above the Danube river surrounded by beautiful vineyards, and the remaining three include predominantly swampy areas famous for large oak trees, typical for this part of Croatia. Two reservations of forest vegetation Lože and Radiševo are also famous for the huge oak trees and Vukovarska ada for various kinds of poplars.

Table 1. Large natural protected areas in Croatian Danube Area

Name of protected area	Type of protection	Town/municipality	Year of designation	Area (hectares)
Kopački rit	nature park	Bilje	1976	17.000
Kopački rit	zoological reservation	Bilje	1967	6.700
Erdut	protected landscape	Erdut	1974	160
Spačva river area	protected landscape	Nijemci	1999	278
Vuka river area	protected landscape	Tordinci	1999	695
Virovi	protected landscape	Otok	1999	185
Podpanj	ornithological reservation	Donji Miholjac	1997	85
Lože	reservation of forest vegetation	Otok	1975	109
Radiševo	reservation of forest vegetation	Vrbanja	1975	4
Vukovarska ada	reservation of forest vegetation	Vukovar	1989	115
Kunjevci	park forest	Vinkovci	1999	26
Zvirinac	park forest	Vinkovci	1999	39
Kanovci	park forest	Vinkovci	2003	18

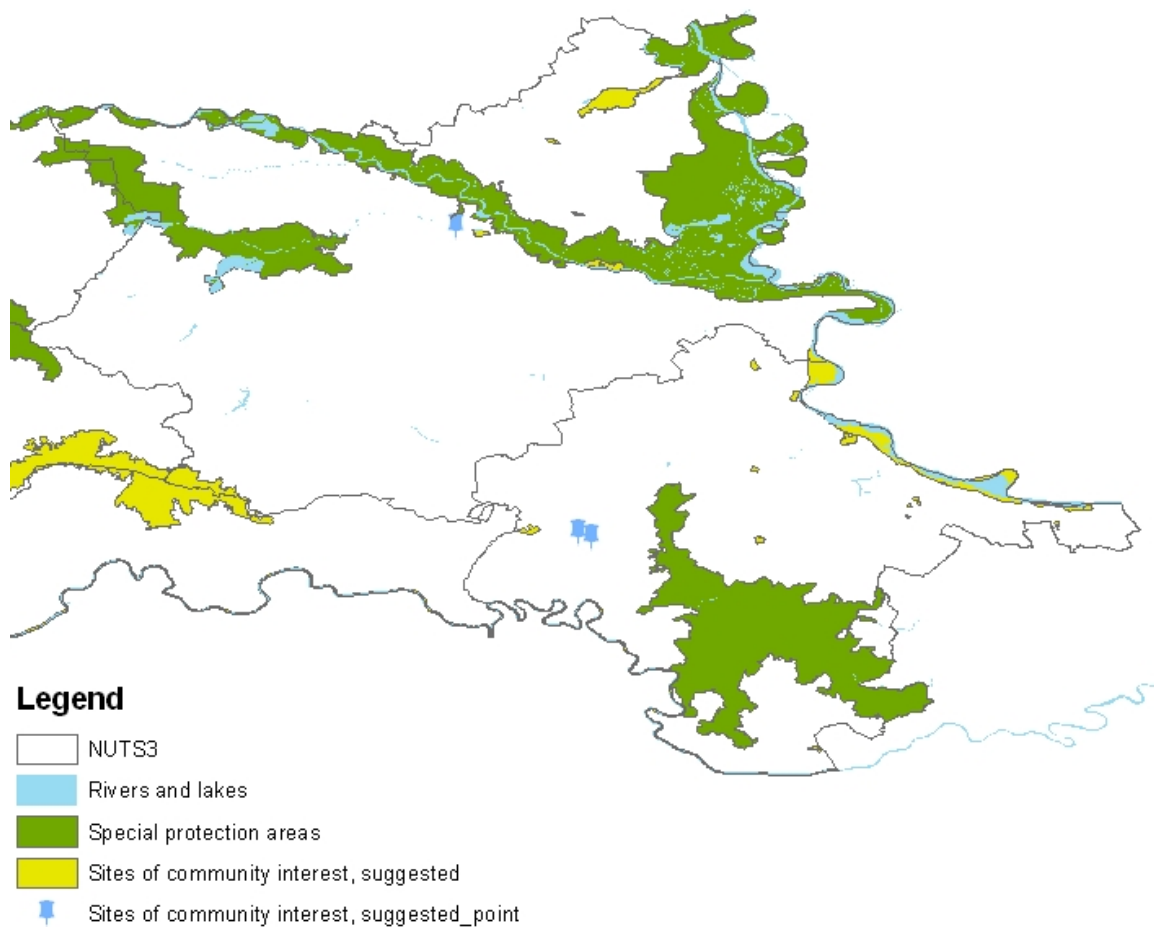
Sources: Public Institutions for Managing Protected Nature Areas in Osijek-Baranya and Vukovar-Srijem county

There are also some smaller protected areas, known as natural monuments, covering relatively small area. In Croatian Danube area they include one natural monument protecting meadows (Bilje cemetery), three natural monuments protecting groups of trees (8 oak trees and one ash tree in Mikanovci, group of oak trees in Radiševo and group of elm trees in Drenovci), and two natural monuments protecting individual trees (oak trees in Ivankovo and Županja). Under special protection as monuments of park architecture there are twelve parks in Osijek-Baranya county (near castles/manors in Bilje, Čepin, Donji Miholjac, Kneževo, Našice, Valpovo and Tenja, Dalj church park, Đakovo Strossmayer park and Small park, Osijek King's Petar Krešimir IV and King Tomislav park) and four in Vukovar-Srijem county (near Nuštar castle, by the fortress in Ilok, and Vinkovci Lenije and Josip Šokčević square park).

1.2. Natura 2000

The majority of the protected areas are also included in the Natura 2000 areas in Croatian Danube areas. In Osijek-Baranya county there are 8 areas and 10 points important for various kinds of species except birds, and in Vukovar-Srijem county 17 areas and 2 points. The largest areas include Kopački rit nature park, remaining areas close to Danube and Drava river and huge area of Spačva with swamps and oak forests in the south of Vukovar-Srijem county. There are also four very large areas important for bird species including the territory close to the rivers of Danube and Drava as well as area near large fishpond Grudnjak in the west of the Osijek-Baranya county and again Spačva swamp.

Figure 1. Natura 2000 areas in Croatia Danube area, State institute for nature protection 2010



1.3. Heritage protection

The cultural heritage of Croatian Danube area is also very rich, although there are no UNESCO World Heritage sites here as in the coastal part of Croatia where total six locations are protected. Nevertheless, there is one element of immaterial heritage of total nine protected in Croatia by UNESCO – it is Spring procession of Ljelje/Kraljice (Queens) from the village Gorjani near Đakovo.

There also two objects from the Croatian Danube area on the tentative list of UNESCO - Croatian part of the Frontiers of the Roman Empire - Danubian limes along the Danube from Batina to Ilok and Historical-Town Planning Ensemble Tvrđa (Fort) in Osijek from 18th century as probably the most attractive cultural monument in the area.

Various cultural heritage sites include archaeological remains from Roman and pre Roman period, attractive churches, fortresses, castles, ethnological heritage, old wine cellars and monuments from recent history. The most important archaeological monument is the locality Vučedol from prehistoric “copper” period as one of the most important Europe from this time. Unfortunately the locality is not in condition to be presented to tourists and was also seriously damaged during the war in 1991. The other monuments from Roman and pre Roman period in the whole area near Danube river and near Osijek are also not in condition to be presented to tourists.

1.4. The main tourist attractions in the Danube Area

Figure 2. Main tourist attractions in Croatian Danube Area



The most attractive **church** in the whole area is *Đakovo Cathedral* from the 19th century built in Romanic style as the most important and attractive church in whole Slavonia. The pope John Ivan XXIII said that it is the most beautiful church between Venice and Constantinople. It is also the biggest and highest in the wider area – the tower is 84 meters high and the dome 59 meters. Very attractive is also *Osijek Cathedral*, the church of St Elias (Meraja) in Vinkovci, *St Anthony from Padua* in Našice, *St. John Capistran* in Ilok and small church of *St. Peter and Paul* in Topolje in Baranya built by the famous general Eugen of Savoia in the memory of the liberation of the land from Ottoman Empire.

The easternmost Croatian town of Ilok is known also for his **fortress** and **wine cellars**, as well as nearby Erdut on Danube with one of the *largest wine barrels in the world*¹. Near Danube is *Baranya wine area* with famous cellars built in sand slopes in villages Zmajevac and Suza. Among many preserved **castles and manors** in Slavonia the most attractive are those in small western towns of Donji Miholjac, Našice and Valpovo, the *Eltz castle* in Vukovar and *manors* in Bilje and Tikveš near Kopački rit in Baranya. Županja on Sava river is known for its unique wooden border fortress.

Rich **ethnological heritage** is presented on many *traditional festivities* round the region. The most important and well known are Vinkovci autumns and Đakovo embroidery. Đakovo is known also for the strongest tradition of horse breeding in Croatia – especially Lipizzaner breed. In the small town of Otok there is unique monument Suvara – the old equine mill. The recent history is the most present in Croatian hero city Vukovar, with museum on Ovčara scaffold and War cemetery. There are also important monuments from the Second World war – the most attractive is unique monumental memorial to Red army in Batina on very attractive view point over Danube river.

¹ Oak barrel of 75.000 litres; in Guinness Book

2. Economic activity of tourism sector

Economic activity of tourism (accommodation and food service activities) of the Danube area generated 3,4% of the Croatia's gross value added in 2007. Compared to 2005, gross value added of this sector increased in absolute terms by 67,8% (from 242 mln. HRK in 2005 to 406 mln. HRK in 2007), but in relative terms, the share of the tourism sector of the Danube area in Croatia's gross value added did not exceeded 3,7% (2006).

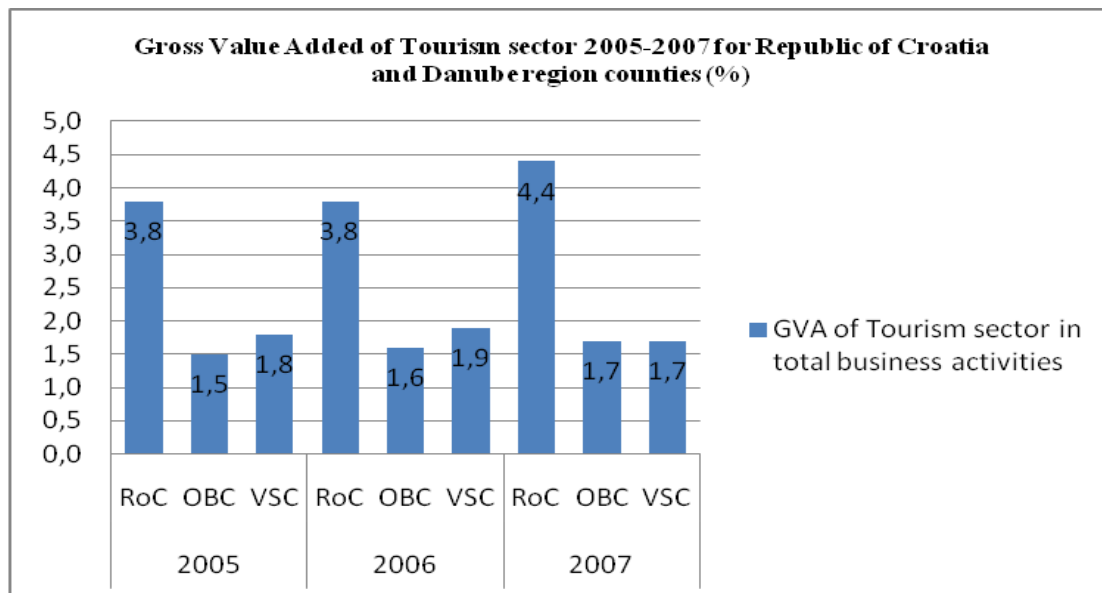
While the share of the tourism in overall Croatia's gross value added in 2007 was 4,4%, in the Danube area, situation is quite different. Namely, in both counties of the Danube area, the share of tourism sector was 1,7% in 2007.

According to data on business entities² in 2009, tourism sector generated 292,5 mln. HRK of revenues or 0,9% out of the area's total, had 173 companies or 3,8% of the area's total and employed 1.533 people or 2,5% of the area's total. At the national, share of tourism sector businesses in overall Croatia's revenue in 2009 was 2,04%.

In the Danube area, number of companies in tourism sector increased by 4,2% in 2009/ 2008 due to the increase in Osijek-Baranya county, which is almost double than the national level of 2,2% increase.

The figure below provides overview of the tourism sector participation in generation of gross value added for Croatia and the counties of the Danube area for 2005-2007.

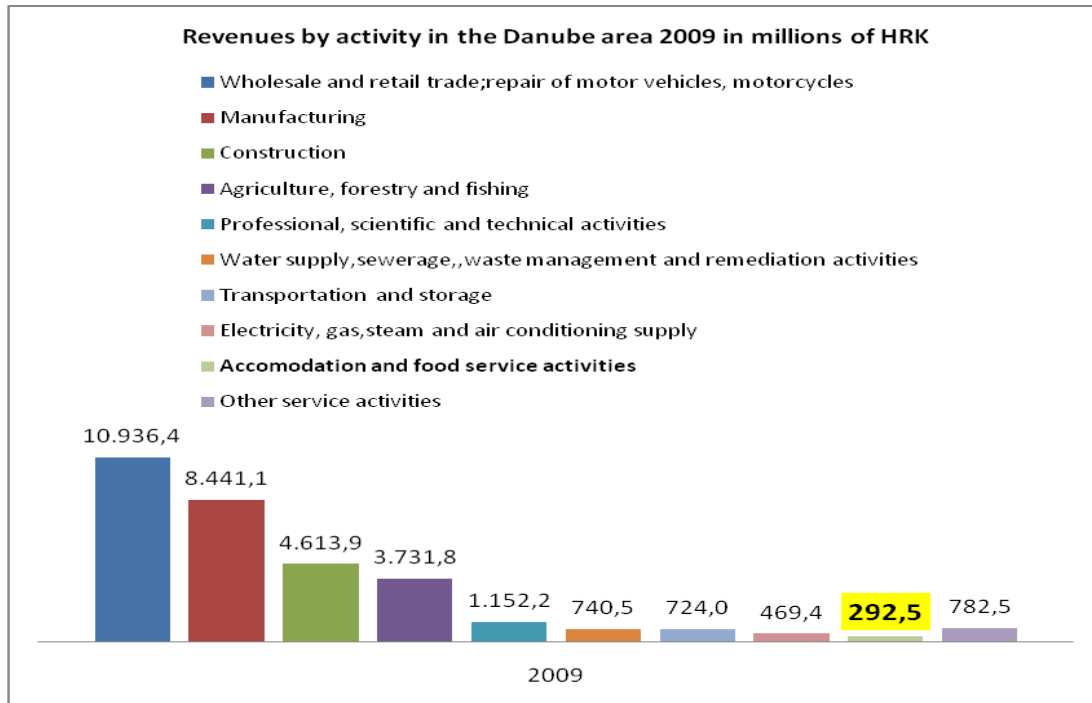
Figure 3. Share of tourism sector in gross value added for Croatia and Danube area counties for 2005-2007 (in %)



² Croatian Chamber of Economy, Osijek

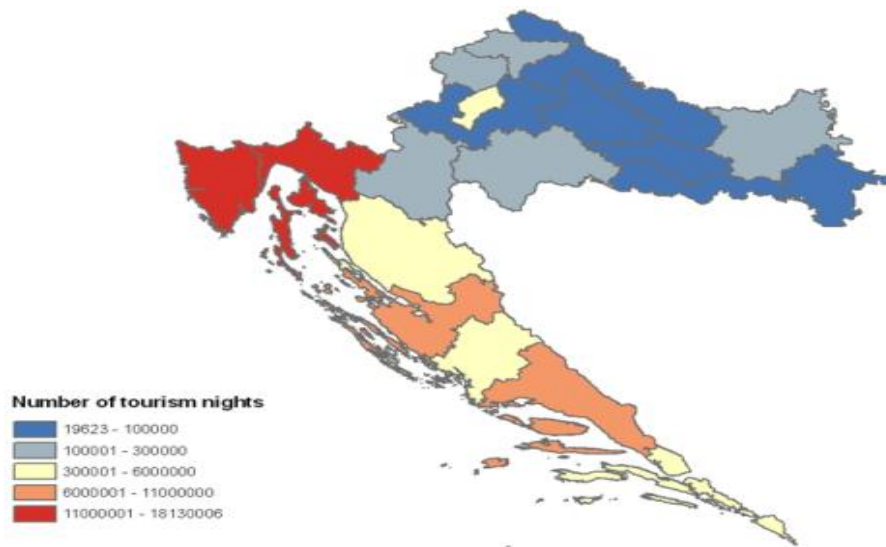
Figure below illustrates revenues generated by sectors of economic activity in 2009.

Figure 4. Revenues generated by enterprises in selected sectors of economic activity in the Danube area with special regard to tourism (accommodation and food service activities) in 2009 in millions of HRK



The Croatia Danube area is one of the less developed parts of Croatia regarding tourism, making only 0.47 % of total and 0,13 % of foreign overnights. The total number of overnights was 265.455 in 2009, from which 187.422 were made in Osijek-Baranya and 78.033 in Vukovar-Srijem county. In relative figures, overnights in Osijek-Baranya represent 70,6% of the total overnights in the Danube Area. In the year 2006 the total number of overnights was 230.304 from which 163.363 were made in Osijek-Baranya and 66.941 in Vukovar-Srijem county. That means total 15 % increase of tourism in the last three years in comparison with only 6% in Croatia, what is very good considering the actual crisis and is showing important rise of tourism importance in the area.

Figure 5. Croatian counties regarding number of tourist overnights in 2009

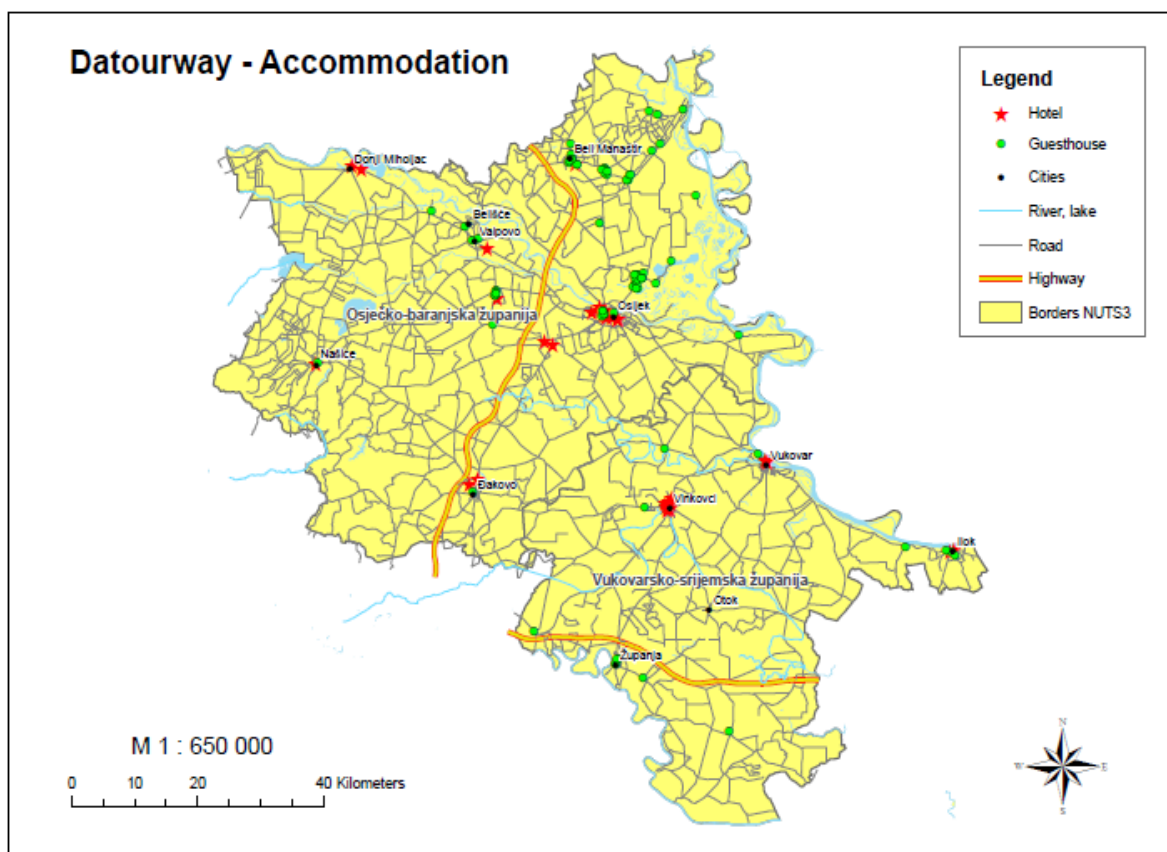


The majority of the tourism is happening in the large towns and is based on **business tourism**. Therefore Osijek is the most visited destination with 96.209 overnights in 2009 and is followed by Vinkovci with 49.696 overnights. More than 10.000 overnights were made also in the towns of Vukovar (21.567 overnights), Valpovo (13.810), Đakovo (10,583) and Našice (10.147 overnights). The only **tourist resort** not connected to towns is Bizovac as the only spa centre in the area with 28.017 overnights.

The **accommodation** in the area is therefore based on hotels, different from the coastal Croatia oriented much more on complementary accommodation such as bed&breakfast or camp sites. In the whole area there were 3.330 beds in 2009, from which 2.415 were made in Osijek-Baranya (72,5%) and 915 in Vukovar-Srijem county (27,5%). The majority of beds were in hotels (total 2.317 or 69,6%), 327 or 9,8% in other forms of similar establishments (pensions, inns, guest houses, hunting lodges) and the remaining 686 or 20,6% mainly in bed & breakfast accommodation.

From total 29 hotels, 7 were four star and 14 three star, with the largest concentration in Osijek with 9 hotels from which 3 were four star and 4 were three star.

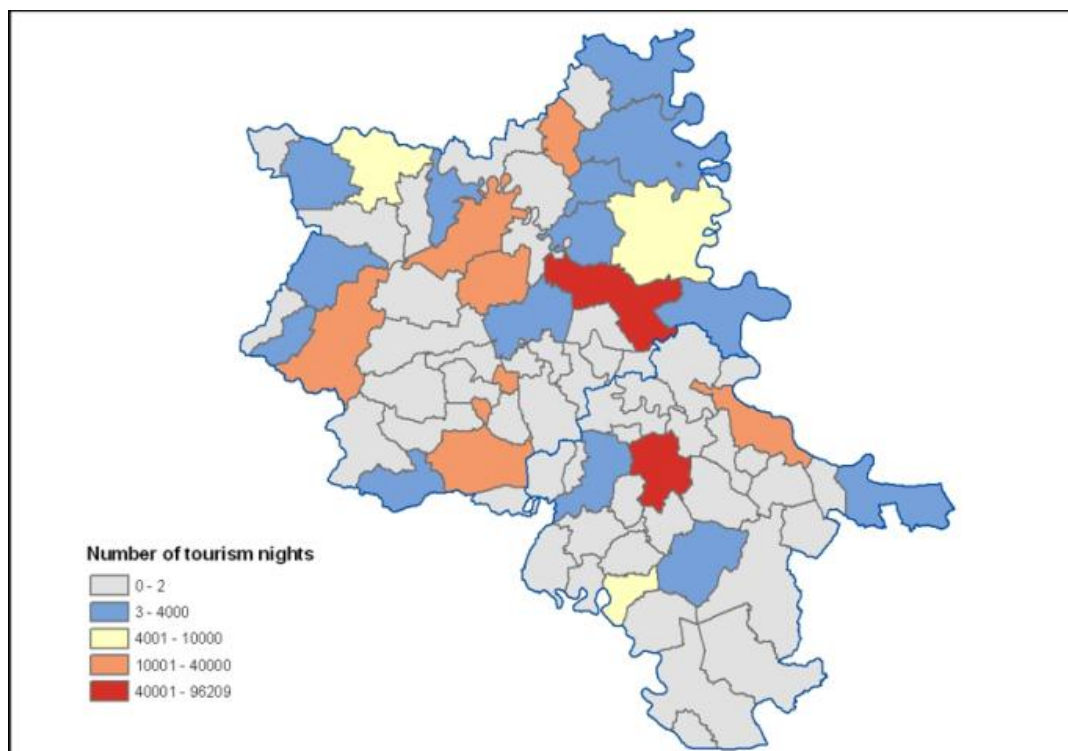
Figure 6. Accommodation in the Danube Area



Within the Danube area there are over 30 TDMOs (tourist agencies), from which only several sell tourist products typical for the area.

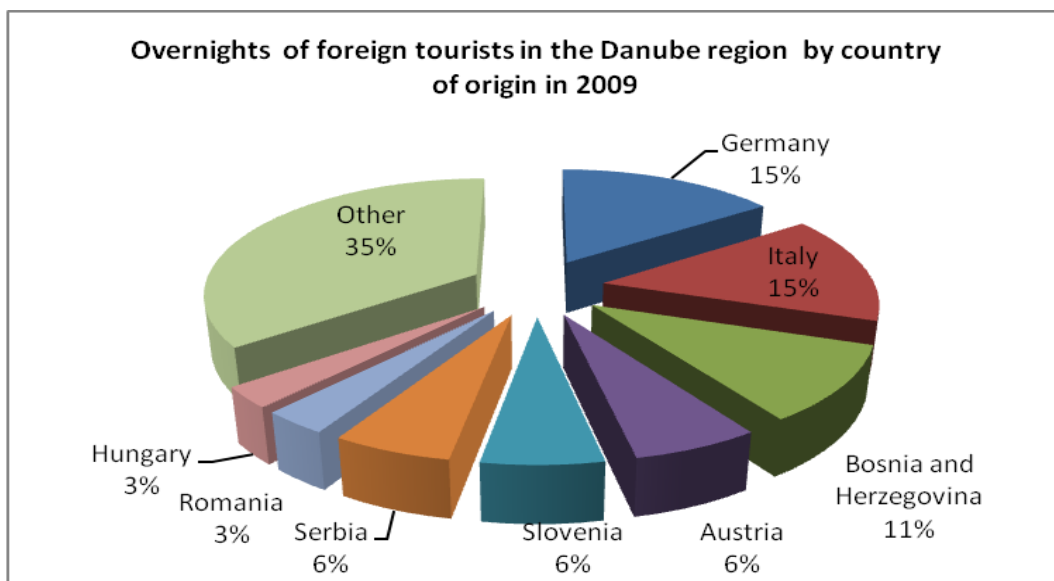
In the Danube region there are more than 50 registered restaurants, with majority of concentration in larger cities (Osijek, Vukovar, Vinkovci).

Figure 7. Towns and municipalities in Croatian Danube region regarding number of tourist overnights in 2009



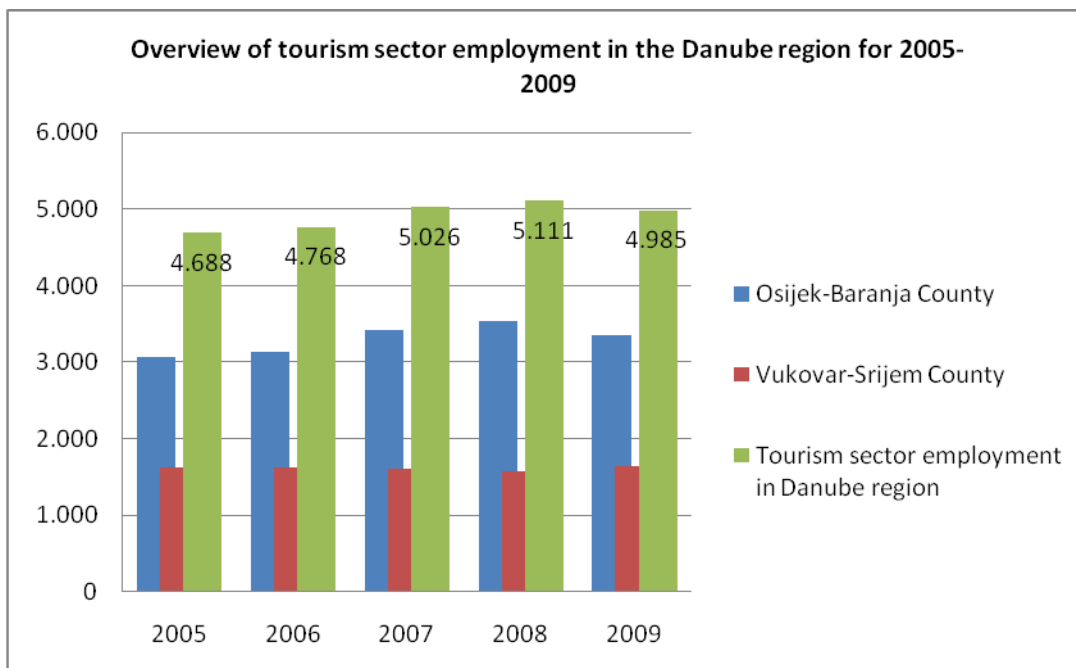
The guests in the area are predominantly domestic (total 75%), what is completely different from the coastal Croatia, where majority is coming from abroad (total 90% in the whole Croatia). The reason is afore mentioned orientation towards business tourism and spas, which are traditionally attracting mainly domestic market. From total 67.117 foreign overnights, 10.281 from Germany, 9.942 from Italy, 6.956 from Bosnia and Herzegovina, 4.206 from Austria, 4.019 from Slovenia, 3.949 from Serbia, 2.178 from Romania and 1.931 from Hungary. Figure below illustrates overnights of foreign visitors by country of origin in 2009.

Figure 8. Overnights of foreign visitors by country of origin in 2009



Tourism sector in the Danube area employed 4.985 people at the end of 2009 or 3,8% out of the total employment in the area. Number of employed workforce within the tourist sector in the Danube area represents 6,6% out of the total in tourism at the national level (75.113 persons). Figure below illustrates employment in tourism sector in the Danube area for the period 2005-2009. Out of total employment in the Danube area, 67,2% refers to Osijek-Baranya.

Figure 9. Overview of the employment in the tourism sector in the Danube area for 2005-2009



In the period 2004-2008, investments in tourism sector in the Danube area were 571,5 mln. HRK or 2,5% out of the total investments in fixed assets of the area's economy. These investments represent 74% out of the total investments in tourism compared to NUTS 2 (Panonian Region) and 3,3% compared to the investments in tourism sector at the national level. Out of the total investments in tourism sector in the Danube area for the same period, Vukovar-Srijem's investments were 65,8% and Osijek-Baranya's 34,2%. Figure below provides overview of the investments in tourism sector for the period 2004-2008.

Figure 10. Investments in tourism sector in the Danube area for 2004-2008 in '000 HR

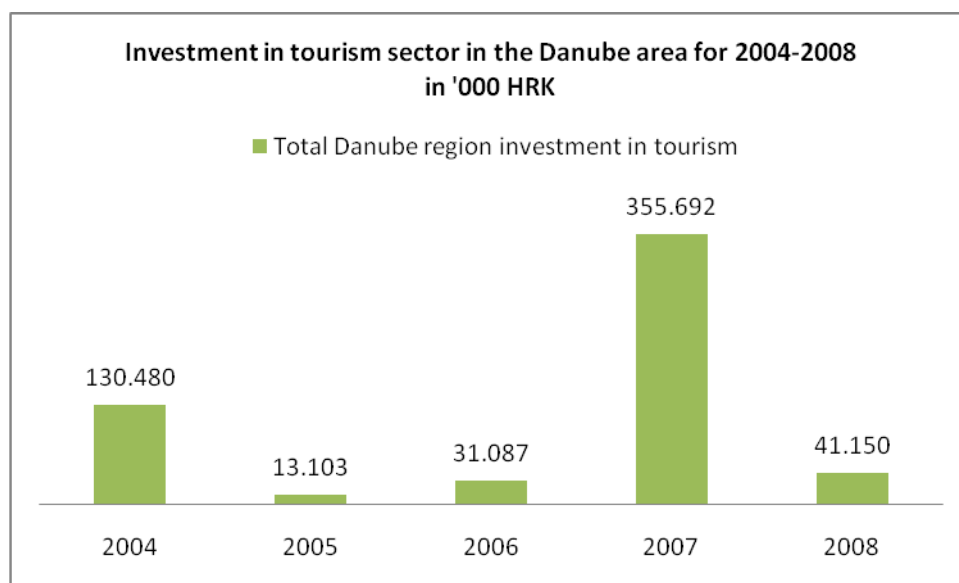


Table below summarises the selected data on tourism sector in the Danube region.

Table 2. Overview of the accommodation, overnights, tourists/visitors, businesses and employment in tourism sector in the Danube Area in 2009

Area	Accommodation (beds)	Overnights		Tourists/visitors		Companies (Ltd)*	Employment**
		Total	Foreign	Total	Foreign		
Osijek-Baranya	2.415	187.422	47.681	78.382	19.512	143	3.351
Vukovar-Srijem	915	78.033	19.436	33.828	8.391	30	1.634
Danube area	3.330	265.455	67.117	112.210	27.903	173	4.985

Source: Central Bureau of Statistics; Croatian Chamber of Economy, Osijek

*Note: Employment figures refer to all businesses in tourism sector including micro-businesses

**Note: Number of companies includes only limited liability companies without micro-businesses

The **organization of tourism in the area** is based on the structure designed by the National Tourism Organization of Croatia. According to that structure the Osijek-Baranya and Vukovar-Srijem county are part of the tourist region Slavonia together with Brod-Posavina, Požega-Slavonia and Virovitica-Podravina county as parts of the historical region Slavonia. At the moment there is no actual organization on that level and therefore the tourism on the regional level is managed by the two county tourism organizations of Osijek-Baranya and Vukovar-Srijem county.

Local tourism organizations exist in all seven towns in Osijek-Baranya county (Beli Manastir, Belišće, Donji Miholjac, Đakovo, Našice, Osijek and Valpovo) and five towns in Vukovar-Srijem county (Ilok, Otok, Vinkovci, Vukovar and Županja). Osijek town tourism organizations have besides central town locations also two allocated tourist information centres in town areas Tvrđa and Gornji Grad.

The municipal tourist organization exist only in five touristically more important municipalities – spa centre Bizovac, Erdut on the Danube (the centre is in pilgrim centre Aljmaš), the municipality of Nijemci in Vukovar-Srijem county and in two municipalities in Croatian Baranya - Bilje as municipality where there is majority of Kopački rit nature and the municipality of Draž. In Baranya there is also a specific tourist organization of the whole microregion Baranya located in Zmajevac in the Kneževi Vinogradi municipality, so in Beli Manastir as the main town in Baranya there is only tourist information centre. In such way local tourism organizations exist in six from eight administrative units participating in the Danube river - two towns Vukovar and Ilok and four municipalities Draž, Kneževi Vinogradi, Bilje and Erdut – not covered are only municipalities Borovo and Lovas in Vukovar-Srijem county, each with only one settlement on the Danube river.