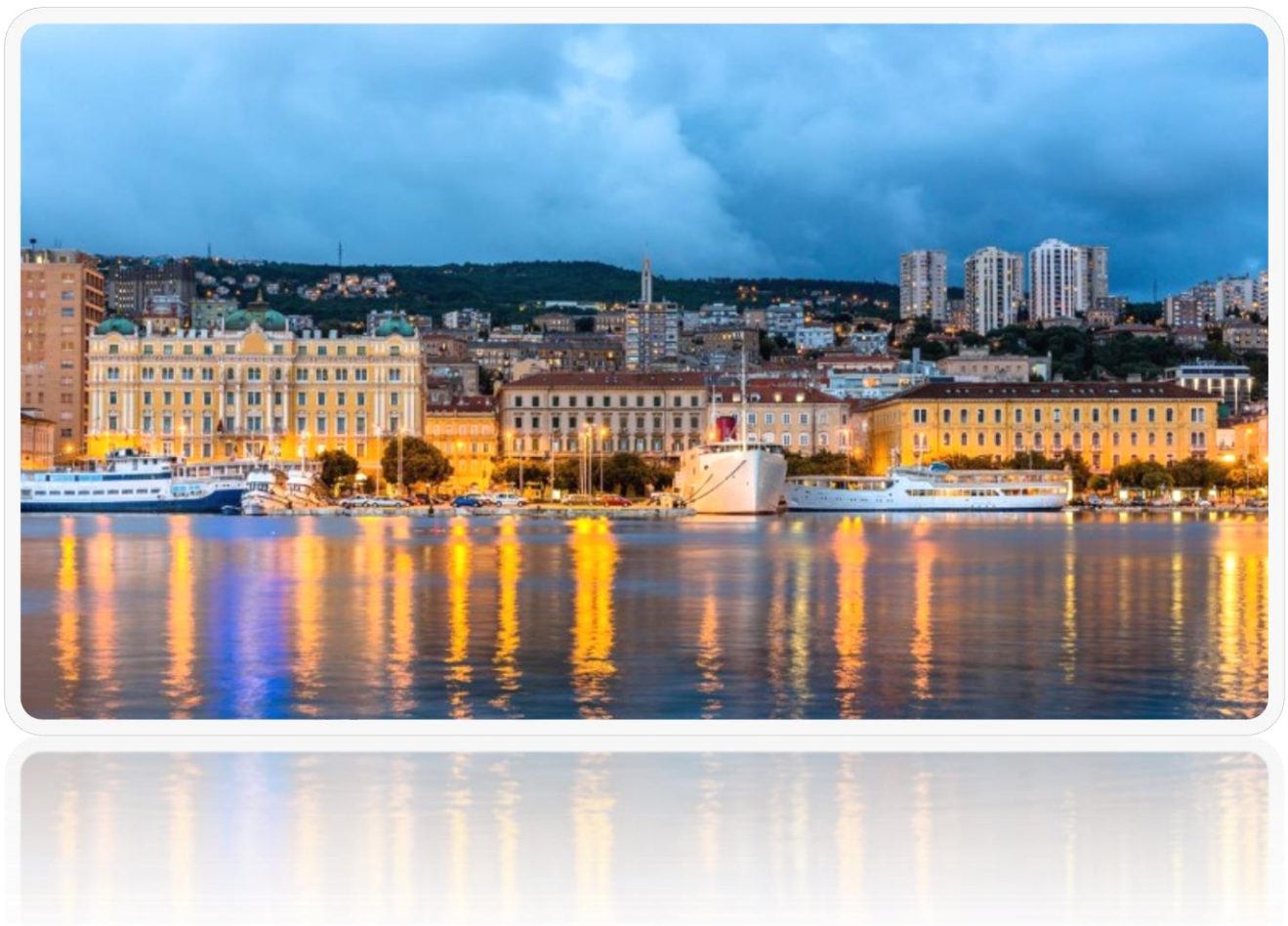


# ANALYSIS OF TOURISM INDICATORS FOR THE CITY OF RIJEKA 2009-2019



Rijeka, January 2021



# Analysis of Tourism Indicators for the City of Rijeka 2009-2019

January 2021

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## 1. Introduction and methodology

The trends in tourism have experienced continuous growth on the international level. Both Croatia and the City of Rijeka have experienced the excellent performance of the tourism sector.

Investments in tourism infrastructure and activities that expand the tourist offer each year are responsible for the improved performance achieved by tourism workers. In 2019, there were five hotels with 588 beds, two inns with 396 beds, fifteen hostels with 420 beds, 2 university campuses with 1,180 beds, 3 secondary school dormitories operational during the school holidays with 423 beds and private accommodation with 1,330 accommodation units and 5,273 beds. For the purposes of the analysis, key physical indicators were examined, such as the structure and number of accommodation capacities, the total domestic and foreign tourist arrivals and overnight stays according to country of residence, type of accommodation, average stay and share of age groups in the total arrivals and overnight stays, as well as the share of agency and individual overnight stays and nautical tourism indicators. In order to demonstrate the financial effect of tourism on the economy of Rijeka, the analysis also includes the total revenues, the number of undertakings and employees, total investments and average net salaries for the three basic tourism activities, activity 55 – Accommodation, activity 56 – Food and beverage service activities and activity 79 – Travel agency, tour operator reservation service and related activities. A comparison of the total revenues in tourism with the total number of overnight stays and a comparison of the total revenues with the total number of employees are also available, clearly indicating the existing trends in tourism.



The period considered refers to the ten-year period from 2009 to 2019. All the physical indicators processed in this analysis were taken from the internal database of the Rijeka Tourist Board and the Port of Rijeka Authority. The financial indicators were taken from the database of the Financial Agency (FINA). With regard to the financial data, it is important to note that the legal obligation for submitting the financial reports for all commercial entities in the tourism sector is only due at the end of March, which is why the analysis includes the years up to and including 2018, the last year with complete data available at the time of writing this analysis.

The fundamental objective is to present the multiannual trends in an analytically objective manner in order to form the preconditions for a new development strategy and strategic objectives for the development of the city of Rijeka as a tourist destination.

## 2. Annual physical indicators

### 2.1. Structure and number of accommodation capacities

Accommodation capacities are among the key elements of the tourism offer, influencing competitiveness and directly influencing the entirety of the tourist experience. A quality accommodation structure positively reflects on a number of impacts, including a decrease in seasonality, increased destination recognition, greater spending at the destination and quality support in product development. Therefore, the development of accommodation capacities as part of the tourist offer in the city of Rijeka is the basis for achieving positive tourism results year after year and as such it is important to recognise them. Table 1 below shows an overview of the number of beds per structure in the period from 2009 to 2019.

Table 1 Overview of the number of beds per structure for the city of Rijeka, 2009-2019

CATEGORY	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Hotels	554	554	554	554	554	554	554	554	554	582	588
Hostels	61	61	91	120	448	429	424	467	439	439	420
Campsite	350	350	350	350	350	350	350	-	-	-	-
Private accommodation	173	189	213	272	411	573	739	1,263	2,409	3,895	5,273
Inns	378	378	378	378	378	378	392	396	396	396	396
University campuses and secondary school dormitories	-	-	-	-	-	116	-	-	202	1,472	1,603
<b>TOTAL BEDS</b>	<b>1,516</b>	<b>1,532</b>	<b>1,586</b>	<b>1,674</b>	<b>2,141</b>	<b>2,400</b>	<b>2,459</b>	<b>2,680</b>	<b>4,000</b>	<b>6,784</b>	<b>8,280</b>

For the city of Rijeka area, Table 1 shows a visible and continuous increase in the number of beds across all categories. Hotels and inns record the least change in the number of accommodation capacities in the period considered. In 2013, hostels saw a significant increase in capacities, with minor fluctuations in the period between 2014 and 2019. The increase in the number of beds leads to the conclusion that investments have been made in the improvement and realisation of services of premium quality. In 2019, the city of Rijeka had a total of 8,280 beds available, an increase of 1,496 beds (22.05%) compared to the previous year, while compared to 2009, the number of beds increased by 6,764, which is five-fold. In the structure of accommodation capacities in 2019, private accommodation stands out with the greatest number of beds at 5,273. University campuses are second with 1,603 beds, hotels have 588 beds, hostels 420 and finally inns with 396 beds.

Interestingly, until 2013 hotels were statistically the most interesting category in terms of the number of beds, but the rapid development and capital investments in private accommodation led to structural changes, particularly visible when comparing the number of beds in 2009 and 2019. The number of beds in private accommodation in 2019 increased by 5,100, which is a significant 30-fold increase compared to 2009, while no significant change in the number of beds in hotels was observed; that is, the number of beds increased by 34, or 6.14%. In summary, the greatest number of beds in the period considered is in:

1. Private accommodation – 44%
2. Hotels – 18%
3. Inns – 12%
4. Hostels – 10%
5. University campuses and secondary school dormitories – 9%
6. Campsites – 7%

Table 2 – Comparison of the number of beds per structure for the city of Rijeka (2019/2009)

ACCOMMODATION TYPE	2019	2009	Index (2019/2009)
Hotels	588	554	106.14
Hostels	420	61	688.52
Private accommodation	5,273	173	3,047.98
Campsite	-	(350)* <sup>1</sup>	n/a
Inns	396	378	104.76
Campuses and dormitories	(1,603)* <sup>1</sup>	-	n/a
<b>TOTAL BEDS</b>	<b>6,677</b>	<b>1,166</b>	<b>546.17</b>

\*Excluded from the comparison of the total number of beds

Looking at Table 2, the greatest number of beds was observed in the private accommodation category, with a 30-fold increase in the period considered compared to the base year of 2009. Furthermore, hotels and inns have experienced a 6.14% and 4.76% increase, respectively. The number of beds in hostels has increased six-fold. It is important to note that Camp Preluk, the university campuses and secondary school dormitories were not continuously operational during the 2009-2019 period, and that the university campuses and secondary school dormitories operate only during school holidays. Therefore, it is not possible to compare the number of beds per structure for campsites, campuses and dormitories so they are excluded from the comparison of the total number of beds.

Looking at the total accommodation capacities, the last ten years have seen a five-fold increase in the average annual number of beds indicating a stable and significant increase in the number of beds and the further development of the tourism offer of the city of Rijeka.

## 2.2. Total arrivals of domestic and foreign tourists

The performance of a tourist destination is determined based on certain categories, with tourist arrivals among the most important categories. Tourist arrivals as an indicator depends on a series of factors, such as the existing tourist offer and accommodation infrastructure, and is an important indicator of trends created throughout the years. Table 3 below clearly demonstrates the positive trend of growth in the total number of arrivals.

Table 3 – Overview of domestic and foreign tourist arrivals in the 2009-2019 period

YEAR	Arrivals			Index		
	Foreign	Domestic	Total	Foreign	Domestic	Total
2009	47,600	18,238	<b>65,838</b>	105.88	85.49	<b>99.32</b>
2010	51,082	17,336	<b>68,418</b>	107.32	95.05	<b>103.92</b>
2011	53,781	17,016	<b>70,797</b>	105.28	98.15	<b>103.48</b>
2012	52,997	16,695	<b>69,692</b>	98.54	98.11	<b>98.44</b>
2013	58,646	17,653	<b>76,299</b>	110.66	105.74	<b>109.48</b>
2014	69,541	21,176	<b>90,717</b>	118.58	119.96	<b>118.90</b>
2015	82,288	23,768	<b>106,056</b>	118.33	112.24	<b>116.91</b>
2016	90,236	24,520	<b>114,756</b>	109.66	103.04	<b>108.13</b>
2017	110,190	24,309	<b>134,499</b>	122.11	99.14	<b>117.20</b>
2018	128,063	27,360	<b>155,423</b>	116.22	112.55	<b>115.56</b>
2019	135,191	31,377	<b>166,568</b>	105.57	114.68	<b>107.17</b>

Chart 1 – Domestic and foreign tourist arrivals in the 2009-2019 period

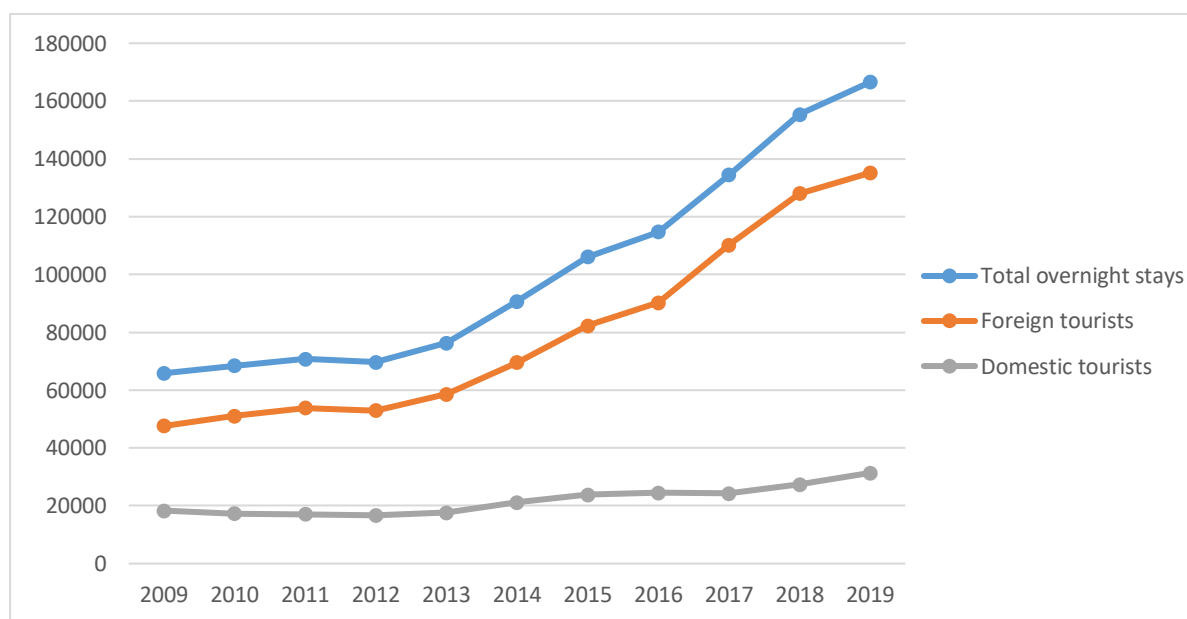


Table 3 shows the domestic and foreign tourist arrivals for the city of Rijeka between 2009 and 2019. The data for the period considered show a continuous increase in the number of arrivals, except for 2012, which recorded a slight decrease of 1.56% compared to the previous year. Furthermore, the most arrivals were recorded in 2019 with 166,568 domestic and foreign tourist arrivals. Compared to the base year of 2009, in 2019 the number of domestic and foreign tourist arrivals increased by 100,730, which is double the amount. Compared to 2018, the number of arrivals increased by 11,145, or 7.17%.

A continuous increase in foreign tourist arrivals is visible, except in 2012 when the number of foreign tourist arrivals decreased by 1.47%, stabilising afterwards and following a positive trend of growth.

The largest number of foreign tourist arrivals was recorded in 2019 with 135,191 arrivals. Compared to 2009, the number of arrivals increased by 87,591, or two-fold.

Domestic tourist arrivals recorded fluctuations, as following a three-year decrease from 2010 to 2012, 2013 saw an increase in the number of arrivals with the trend continuing until 2017, when a slight decrease in the number of domestic tourist arrivals was recorded. In 2018 the number of domestic tourist arrivals increased, while 2019 recorded the greatest number of domestic tourist arrivals at 31,377. Compared to 2009, in 2019 the number of arrivals increased by 13,139, or 72.04%.

The comparison of the number of arrivals chain indices represents the relation of the annual performance with the previous year. For the ten-year period considered, the index shows that the greatest increase in the total number of arrivals occurred in 2014 (+18.90%), while 2015 (+16.91%) should also be pointed out as one of the more successful tourist seasons. The greatest increase in domestic tourist arrivals occurred in 2014 (+19.96%) and 2019 (+14.68%), while the greatest increase in foreign tourist arrivals occurred in 2014 (+18.58%) and 2017 (+22.11%).

### 2.3. Total overnight stays of domestic and foreign tourists

The number of overnight stays, which shows how long tourists spend in a certain location, also serves as an import indicator of the quality of that tourist destination. The number of overnight stays is closely linked to the number of domestic and foreign tourist arrivals and demonstrates a similar positive trend of growth for the city of Rijeka, as evidenced by Table 4 below.

Table 4 – Overview of domestic and foreign tourist overnight stays in the 2009-2019 period

YEAR	Overnight stays			Index		
	Foreign	Domestic	Total	Foreign	Domestic	Total
2009	91,262	32,765	<b>124,027</b>	114.09	87.87	<b>105.76</b>
2010	95,381	31,962	<b>127,343</b>	104.51	97.55	<b>102.67</b>
2011	101,935	33,845	<b>135,780</b>	106.87	105.89	<b>106.63</b>
2012	102,016	33,564	<b>135,580</b>	100.08	99.17	<b>99.85</b>
2013	112,656	33,521	<b>146,177</b>	110.43	99.87	<b>107.82</b>
2014	132,238	41,311	<b>173,549</b>	117.38	123.24	<b>118.73</b>
2015	166,722	46,827	<b>213,549</b>	126.08	113.35	<b>123.05</b>
2016	208,646	52,733	<b>261,379</b>	125.15	112.61	<b>122.40</b>
2017	283,949	49,662	<b>333,611</b>	136.09	94.18	<b>127.63</b>
2018	344,982	62,981	<b>407,963</b>	121.49	126.82	<b>122.29</b>
2019	387,947	79,773	<b>467,720</b>	112.45	126.66	<b>114.65</b>



Chart 2 – Domestic and foreign tourist overnight stays in the 2009-2019 period

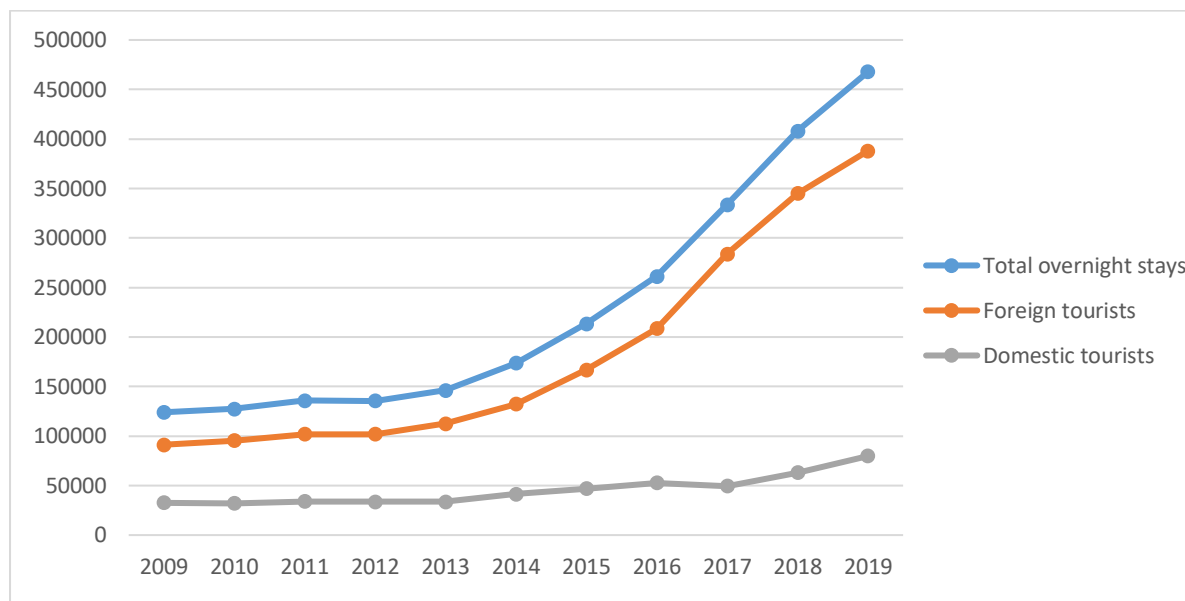


Table 4 shows that after a slight decrease in 2012 and 2013, the following years experienced a continuous increase in the total number of domestic and foreign tourist overnight stays. During the period considered, the greatest number of overnight stays in the city of Rijeka occurred in 2019 with 467,720 domestic and foreign tourist overnight stays, which is a 14.65% increase (59,757 overnight stay more) compared to the previous year. Compared to the base year of 2009, it is important to point out that the number of overnight stays increased in 2019 by a significant 343,693 stays, which is a three-fold increase. This fact demonstrates how the city of Rijeka has developed as a tourist destination in the last ten years.

The number of foreign tourist overnight stays has been continuously increasing since 2009. 387,947 foreign tourist overnight stays were recorded in 2019, which is 296,685 more, or a four-fold increase, compared to the base year of 2009, and a 12.45% increase, or 42,965 overnight stays more compared to the previous year.

Domestic tourist overnight stays in the period considered recorded slight fluctuations between 2009 and 2013. Following 2014, there was a three-year increase in the number of domestic overnight stays, while 2017 recorded a decrease of 5.82% compared to the previous year. Furthermore, the number of domestic tourist overnight stays increased sharply in 2018 by 13,319, or 26.82%, and continued to increase in 2019 as well, with 79,773 domestic tourist overnight stays, which is a 16,792, or 26.66% increase.

Table 4 shows that each year, foreign tourists account for a greater number of overnight stays compared to domestic tourists. In 2019, foreign tourist overnight stays account for 82.94% and domestic tourist overnight stays 17.06% of the total number of overnight stays.

Chain indices for the number of overnight stays are compared to the previous year. For the ten-year period considered, the index shows that the greatest increase in the total number of overnight stays occurred in 2017 (+27.63%), with 2016 (+22.40%) and 2018 (22.29%) also among the more successful seasons in terms of overnight stays. The greatest increase in domestic tourist overnight stays was

recorded in 2018 (+26.82%) and 2019 (+26.66%), while the greatest increase in foreign tourist overnight stays occurred in 2015 (+26.08%) and 2017 (+36.09%).

Taking into account the data reported, which demonstrate growth trends of both arrivals as well as overnight stays comparable to tourism trends in Croatia, it is possible to conclude that tourists are spending more time in Rijeka.

## 2.4. Total arrivals and overnight stays according to country of residence

When creating this Analysis, one of the most important questions concerning foreign tourists is their country of residence.

With its development based on a unique geographical location, Rijeka is a pleasant city to live in, acity of culture and creativity, while as a centre of diverse national and European cultural and art programmes, the city is also host to a number of international and national artists. The city of Rijeka is traditionally a popular destination from many tourists from neighbouring countries, especially Italy and Germany. The following aggregated tables show the top ten countries in terms of the total number of arrivals and overnight stays in the period considered.

Chart 3 – Top 10 countries according to total arrivals in the 2009-2019 period

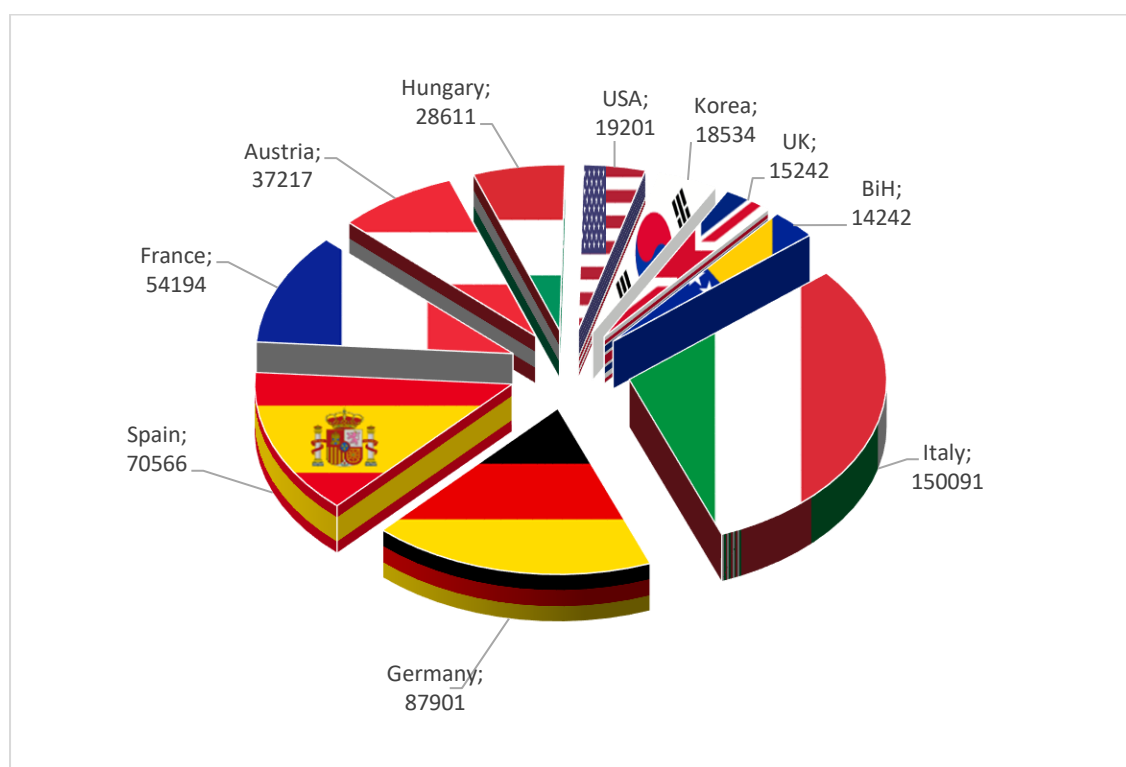
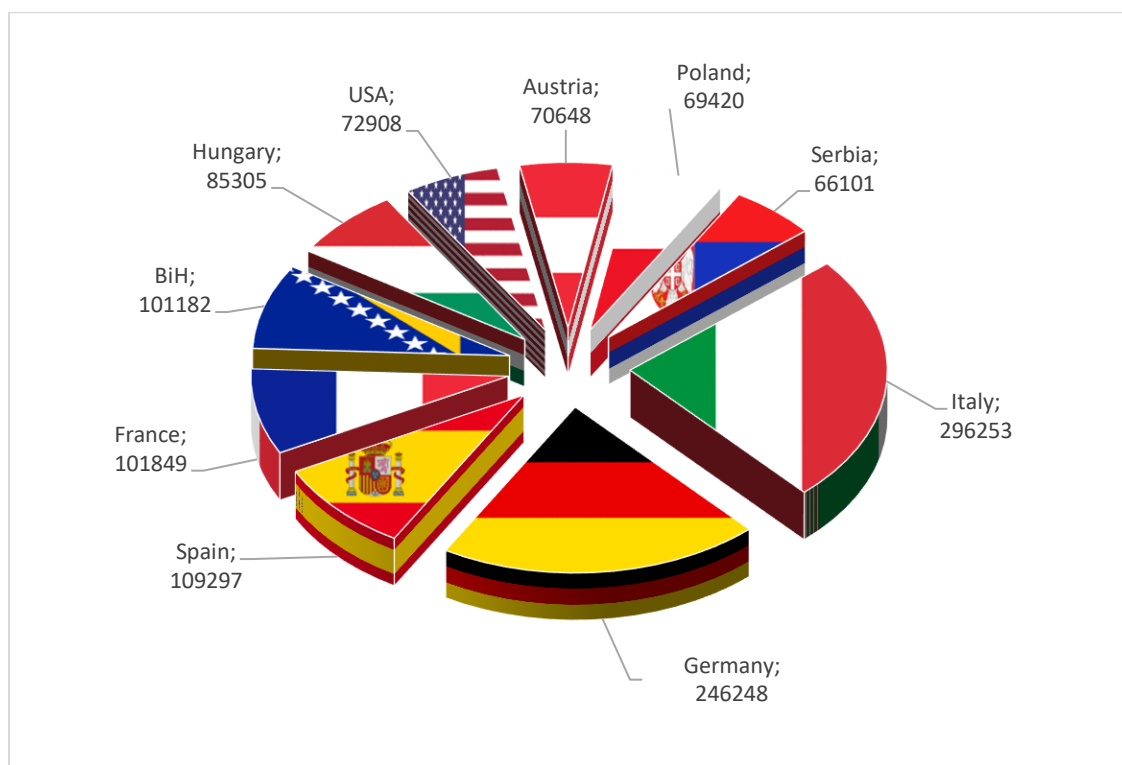


Chart 4 – Top 10 countries according to total overnight stays for the 2009-2019 period



Looking at Charts 3 and 4, tourists from Italy and Germany especially stand out, with tourists from Italy leading by a significant margin in total arrivals and overnight stays, and tourists from Germany in the number of arrivals. In the period considered, tourists from Italy accounted for the greatest number of arrivals and overnight stays in the city of Rijeka with 150,091 arrivals and 296,253 overnight stays. Tourists from Germany are second with 87,901 arrivals and 246,248 overnight stays. Spanish tourists are third with 70,566 arrivals and 109,297 overnight stays. France is fourth in the number of arrivals and overnight stays with 54,194 arrivals and 101,849 overnight stays. Additionally, in terms of arrivals, tourists from Austria, Hungary, the USA, Korea, the UK and Bosnia and Herzegovina represent a significant segment of the tourist market for the City of Rijeka. In terms of overnight stays, France is followed by tourists from Bosnia and Herzegovina, the USA, Austria, Poland and Serbia.

## 2.5. Total arrivals and overnight stays according to type of accommodation

In 2019, the city of Rijeka experienced an increase in the number of beds with a new total of 8,280 available beds. Tourist accommodation in the city of Rijeka includes five hotels, two inns and fifteen hostels, as well as 1,330 units of private accommodation.

In Tables 5 and 6, inns were included in the hotel category until 2016, but from that year onwards, the eVisitor system has been used as the statistical data source and inns and non-commercial accommodation are treated as separate categories for the first time. From 2016 onwards, campsites are not included in the table as, with the closure of Camp Preluk, no other campsites operate in the city of Rijeka.

Table 5 – Structure of total arrivals according to type of accommodation in the 2009-2019 period

TYPE	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Hotels	49,911	51,242	53,110	50,920	50,818	51,958	57,719	54,199	58,454	56,692	55,068
Campsite	5,970	7,041	7,006	6,240	6,002	4,968	5,232	-	-	-	-
Private accommodation	2,881	3,087	3,781	4,371	6,608	10,405	16,015	27,403	43,640	64,645	79,868
Inns	-	-	-	-	-	-	-	2,551	1,080	1,568	1,139
Hostels	7,076	7,048	6,900	8,161	12,871	23,386	27,090	28,775	28,573	29,459	27,302
Non-commercial accommodation	-	-	-	-	-	-	-	1,828	2,752	3,059	3,191
<b>TOTAL</b>	<b>65,838</b>	<b>68,418</b>	<b>70,797</b>	<b>69,692</b>	<b>76,299</b>	<b>90,717</b>	<b>106,056</b>	<b>114,756</b>	<b>134,499</b>	<b>155,423</b>	<b>166,568</b>

Table 6 – Structure of total overnight stays according to type of accommodation in the 2009-2019 period

Accommodation	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Hotels	88,877	88,310	94,168	90,842	88,468	92,666	104,917	95,465	102,539	96,183	100,247
Campsite	14,932	17,923	18,435	15,344	13,311	11,193	10,857	-	-	-	-
Private accommodation	10,300	11,207	13,326	17,305	24,011	33,188	51,358	88,349	141,935	209,402	265,423
Inns	-	-	-	-	-	-	-	6,074	3,449	4,934	3,248
Hostels	9,918	9,903	9,851	12,089	20,387	36,502	46,417	49,792	50,552	55,816	49,843
Non-commercial accommodation	-	-	-	-	-	-	-	21,699	35,136	41,628	48,959
<b>TOTAL</b>	<b>124,027</b>	<b>127,343</b>	<b>135,780</b>	<b>135,580</b>	<b>146,177</b>	<b>173,549</b>	<b>213,549</b>	<b>261,379</b>	<b>333,611</b>	<b>407,963</b>	<b>467,720</b>

Table 7 – Percentage share by type of accommodation in total arrivals and overnight stays (2019/2009)

CATEGORY	2019		2009	
	Arrivals	Overnight stays	Arrivals	Overnight stays
Hotels	33.06%	21.43%	75.81%	71.66%
Campsite	0.00%	0.00%	9.07%	12.04%
Private accommodation	47.95%	56.74%	4.38%	8.30%
Inns	0.68%	0.69%	0.00%	0.00%
Hostels	16.39%	10.66%	10.75%	8.00%
Non-commercial accommodation	1.92%	10.47%	0.00%	0.00%
<b>TOTAL:</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

## **HOTELS**

Five hotels operated in the city of Rijeka in 2019: Grand hotel Bonavia (\*\*\*\*), Hotel Jadran (\*\*\*\*), Hotel Continental (\*\*\*), Hotel Neboder (\*\*\*) and the Molo Longo Integral Hotel. The tables have been adapted to reflect the changes in categorisation, since until 2016, inns were included in the hotel category.

Hotels are second in the total number of arrivals and overnight stays according to accommodation type, following private accommodation in first place. Table 7 shows a significant change in the structure of accommodation capacities in the city of Rijeka, since in 2019 the hotel share in the number of arrivals declined from 75.81% to 33.06% and in overnight stays from 71.66% to 21.43% compared to 2009.

Looking at the structure of the total arrivals, hotels experienced significant fluctuations during the 2009-2019 period. Hotels experienced the greatest number of arrivals in 2017 with 58,454 arrivals. The number of arrivals in 2019 decreased by 2.95% compared to the previous year. Despite the decrease in the number of arrivals, with 55,068 arrivals, 2019 experienced a 10.33% increase compared to 2009. Looking at the data, it is possible to conclude that hotels did not experience significant changes in terms of arrivals.

Overnight stays in hotels during the period considered are also characterised by fluctuations, with the greatest number of overnight stays recorded in 2015 with 104,917 overnight stays. The number of overnight stays in 2019 increased by 2.10% compared to the previous year. Compared to the base year of 2009, the number of overnight stays increased in 2019, with 100,247 overnight stays, which is a 12.79% increase.

## **PRIVATE ACCOMMODATION**

Private accommodation means accommodation capacities owned by natural persons and includes apartments, studio apartments, rooms and holiday homes. In 2019, private accommodation was first in arrivals and overnight stays in terms of the type of accommodation. Private accommodation accounted for on average 1,330 accommodation units in 2019.

It is important to point out the rapid growth and development of private accommodation that followed the development of tourism in Rijeka, as demonstrated in Table 7. In 2009, the share of private accommodation accounted for 4.38% of the total arrivals and 8.30% of the total overnight stays, while in 2019 the share was 47.94% and 56.74% respectively. Moreover, Tables 5 and 6 clearly show an increase in the number of arrivals and overnight stays in the period considered. Compared to the previous year, in 2017 the number of arrivals and overnight stays increased rapidly by 16,246 and 54,277 respectively, accounting for a 59.3% increase in arrivals and a 61.91% increase in overnight stays. Compared to the previous year, in 2019 arrivals increased by 79,868, or 23.55%, while overnight stays increased by 265,423, or 26.75%.

A clear difference is evident between the increased number of arrivals and overnight stays in private accommodation compared to hotels.

## **INNS**

An inn is a facility providing guests with accommodation services, which can also offer food and beverages to its guests, with rooms as accommodation units. In 2019, the share of inns amounted to 0.68% of the total arrivals and 0.69% of the total overnight stays. Inns recorded the greatest number

of arrivals in 2016 with 2,551 arrivals. In 2019, the number of arrivals fell to 1,139, marking a 37.66% decrease compared to the previous year. Inns recorded the greatest number of overnight stays in 2016 with 6,074 arrivals. There were 3,248 overnight stays recorded in 2019, which is a 51.90% decrease compared to the previous year.

## **HOSTELS**

Fifteen hostels operated in the city of Rijeka in 2019, with most overnight stays recorded by Hostel Botel Marina with 13,545 overnight stays, HI Hostel Rijeka with 7,546 overnight stays, Hostel Lavanda with 3,653 overnight stays, Hostel Češka beseda Rijeka with 3,303 overnight stays, Fun Hostel with 3,249 overnight stays and Hostel Rijeka with 3,118 overnight stays. The accommodation capacity of the city of Rijeka is further diversified with the opening of new hostels.

Hostel arrivals are characterised by fluctuations, with 2010 and 2011 experiencing a decrease in the number of arrivals, while the number of arrivals successively increased during the period from 2012 to 2016. In 2019, a slight decrease of 7.9% was recorded with 27,302 arrivals compared to 2018, which recorded the largest number of arrivals at 29,459.

Overnight stays were decreasing up to 2011, while from 2012 to 2018, the number of hostel overnight stays continuously increased. During the period considered, the most overnight stays were recorded in 2018 with 55,816 overnight stays. In 2019, the number of overnight stays was 49,843, a 5,973 or 11.98% decrease compared to the previous year.

In 2009, hostels accounted for 10.75% of arrivals and 8.00% of overnight stays, and 16.39% of arrivals and 10.66% of overnight stays in 2019.

## **NON-COMMERCIAL ACCOMMODATION**

Non-commercial accommodation includes staying in holiday homes and other non-commercial accommodation facilities not charging for accommodation. In 2019, the share of non-commercial accommodation amounted to 1.92% of the total arrivals and 10.47% of the total overnight stays. The number of arrivals and overnight stays in non-commercial accommodation follows a positive trend of growth. 3,191 arrivals were recorded in 2019, representing a 4.32% increase compared to the previous year and a 74.56% increase compared to 2016, when the eVisitor system started recording tourist traffic in non-commercial accommodation as a separate category. 48,959 overnight stays were recorded in 2019, representing a 17.61% increase compared to 2018, and a 25.63% increase compared to 2016.

## **CAMPSITES**

Campsites are establishments consisting of an organised outdoor space intended for the provision of accommodation services, various buildings for accommodating guests and catering to the guests' other needs. Camp Preluk was the only campsite in Rijeka, but it was closed in 2016.

As seen in Tables 5 and 6, the data on arrivals and overnight stays according to type of accommodation was no longer collected after 2016 and as such is not comparable for the ten-year period examined in this Analysis. According to the data in the above tables, we can conclude that 2010 recorded the greatest number of arrivals and 2011 the greatest number of overnight stays, while the category records a decrease in both arrivals and overnight stays from then on.

## 2.6. Share of age groups in the total arrivals and overnight stays

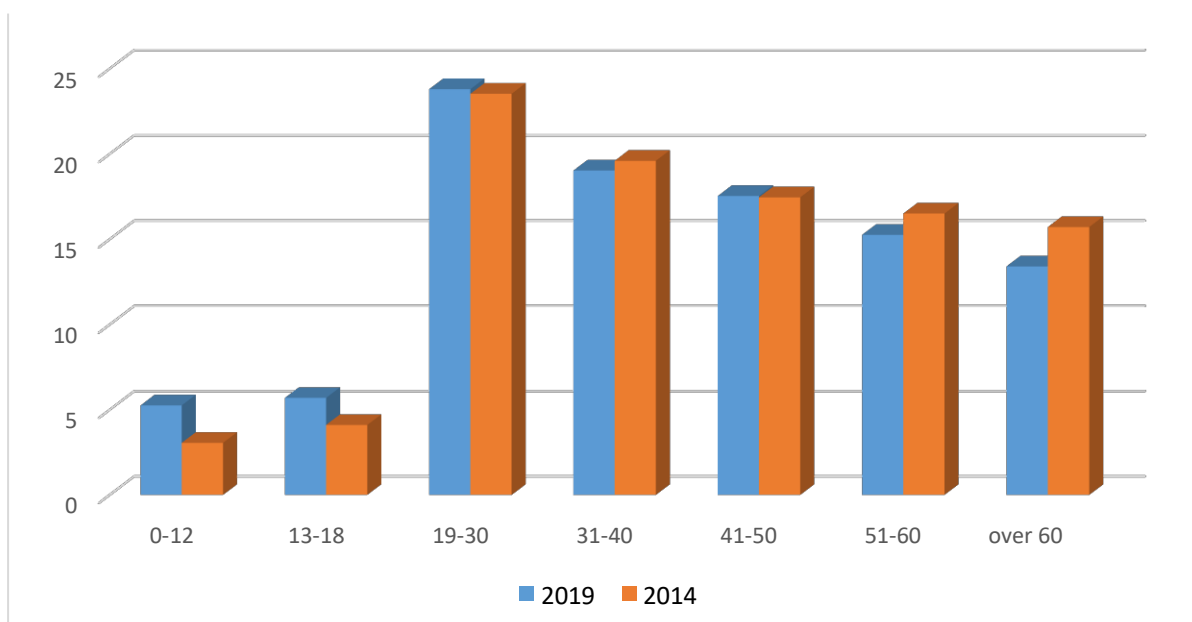
The following is an overview of the number of tourists visiting Rijeka according to age group. Tourist traffic (arrivals and overnight stays) according to age group will be presented for 2014 and 2019 given the fact that the relevant data has only been tracked from 2014 and logged by the eVisitor system since 2016.

The tables below show that in terms of arrivals and overnight stays, the greatest number of tourists in the city of Rijeka belong to the 19-30 age group, followed by the 31-40 age group, while the fewest tourists belong to the 0-12 and 13-18 age group.

Table 8 – Comparison of the absolute and percentage shares of the age structure of tourists in arrivals (2019/2014)

AGE GROUP	Arrivals 2019	Arrivals 2014	Share of arrivals 2019	Share of arrivals 2014
0 to 12 years	8,761	2,773	5.26%	3.06%
13 to 18 years	9,501	3,732	5.70%	4.11%
19 to 30 years	39,816	21,350	23.80%	23.53%
31 to 40 years	31,702	17,779	19.03%	19.60%
41 to 50 years	29,212	15,840	17.54%	17.46%
51 to 60 years	25,420	14,978	15.26%	16.51%
over 60 years	22,328	14,265	13.41%	15.72%
<b>TOTAL:</b>	<b>166,568</b>	<b>90,717</b>	<b>100.00%</b>	<b>100.00%</b>

Chart 5 – Comparison of the percentage share of the age structure of tourists in arrivals (2019/2014)



In terms of age, younger people in the 19-30 age group accounted for the most arrivals in 2019, with 39,816 arrivals and a 23.80% share. At 21,350, the number of arrivals in 2019 increased by 85.69%

compared to 2014, while the share of arrivals increased by 0.27% compared to 2014, when tourists in that age group accounted for 23.53% of the total share of arrivals. Another age group with a large share in arrivals is the 31-40 age group, with 31,702 arrivals in 2019 and a 19.03% share, which is a 78.41% increase in arrivals compared to 2014. This age group accounted for a 19.60% share of the total arrivals in 2019, which is a 0.57% decrease compared to 2014.

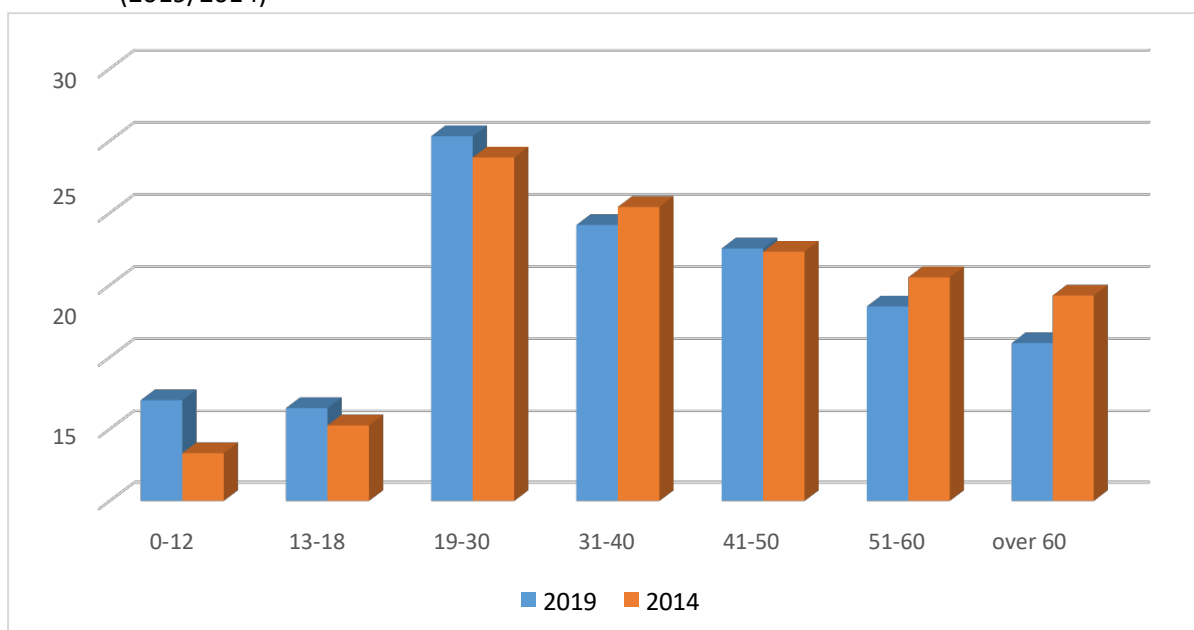
Tourists in the 41-50 age group accounted for 17.46% of arrivals in 2014 and 17.54% in 2019, while tourists in the 51-60 age group accounted for 16.51% of arrivals in 2014 and 15.26% in 2019. Tourists over 60 had a 15.72% share of arrivals in 2014 and a 13.41% share in 2019. Tourists in the 13-18 age group accounted for 4.11% of arrivals in 2014 and 5.70% in 2019. Tourists in the 0-12 age group recorded the fewest arrivals, with a 3.06% share in 2014 and a 5.26% share in 2019.

When comparing 2019 to 2014, we can conclude that the 0-12, 13-18, 19-30 and 41-50 age groups increased their share in arrivals, while the 31-40, 51-60 and the over 60 age groups experienced a decrease in the share of arrivals.

Table 9 – Comparison of the absolute and percentage shares of the age structure of tourists in overnight stays (2019/2014)

AGE GROUP	Overnight stays 2019	Overnight stays 2014	Share of overnight stays 2019	Share of overnight stays 2014
0 to 12 years	32,766	5,769	7.01%	3.32%
13 to 18 years	30,201	9,132	6.46%	5.26%
19 to 30 years	118,444	41,397	25.32%	23.85%
31 to 40 years	89,685	35,436	19.17%	20.42%
41 to 50 years	82,023	30,066	17.54%	17.32%
51 to 60 years	63,245	26,969	13.52%	15.54%
over 60 years	51,351	24,780	10.98%	14.28%
<b>TOTAL:</b>	<b>467,720</b>	<b>173,549</b>	<b>100.00%</b>	<b>100.00%</b>

Chart 6 – Comparison of the percentage share of the age structure of tourists in overnight stays (2019/2014)





In terms of age, tourists in the 19-30 age group accounted for the largest number of total overnight stays in 2019, with 118,444 overnight stays and a 25.32% share. The number of overnight stays increased two-fold from 2014, when tourists in this age group accounted for 41,397 overnight stays, while the total share increased by 1.47%. Tourists in the 31-40 age group are also responsible for a large number of overnight stays in 2019, accounting for 89,685 overnight stays and a 19.17% share. The number of overnight stays increased two-fold from 35,436 in 2014, while the share of total overnight stays decreased by 1.25%. Tourists in the 41-50 age group accounted for 17.32% of overnight stays in 2014 and 17.54% in 2019, while tourists in the 51-60 age group accounted for 15.54% of overnight stays in 2014 and 13.52% in 2019, and tourists over 60 accounted for 14.28% of overnight stays in 2014 and 10.98% in 2019. Tourists in the 13-18 age group were responsible for 5.26% of the total overnight stays in 2014 and 6.46% in 2019. Tourists in the 0-12 age group were responsible for the least amount of overnight stays, with a 3.32% share in 2014 and 7.01% in 2019.

In terms of demographics, younger (19-30) and middle-aged (31-40) tourists are responsible for the most arrivals and overnight stays, while children and teenagers (0-12 and 13-18 age groups), as well as tourists over 60 are responsible for the fewest arrivals and overnight stays.

When comparing 2019 to 2014, we can conclude that the 0-12, 13-18, 19-30 and 41-50 age groups increased their share in overnight stays, while the 31-40, 51-60 and the over 60 age groups experienced a decrease in the share of overnight stays.

## 2.7. Share of agency and individual arrivals and overnight stays

One of the more important indicators of tourist traffic is the type of arrivals and overnight stays, which provides information on the number of tourists engaging a travel agency compared to the number of tourists arranging their trip and accommodation individually.

The statistics on agency and individual overnight stays have been tracked by the eVisitor system since 2016, while this Analysis takes into account the period from 2016 to 2019.

Table 10 – Percentage share of tourists according to type of arrival and overnight stay in the 2016-2019 period

YEAR	Type	Arrivals	Overnight stays	Arrivals %	Overnight stays %
2016	Agency	59,242	118,177	51.62%	45.21%
	Individual	55,514	143,202	48.38%	54.79%
	<b>Total</b>	<b>114,756</b>	<b>261,379</b>	<b>100</b>	<b>100</b>
2017	Agency	63,365	124,849	47.11%	37.42%
	Individual	71,134	208,762	52.89%	62.58%
	<b>Total</b>	<b>134,499</b>	<b>333,611</b>	<b>100%</b>	<b>100.00%</b>
2018	Agency	62,405	126,086	40.15%	30.91%
	Individual	93,018	281,877	59.85%	69.09%
	<b>Total</b>	<b>155,423</b>	<b>407,963</b>	<b>100%</b>	<b>100%</b>
2019	Agency	58,949	128,620	35.39%	27.50%
	Individual	107,619	339,100	64.61%	72.50%
	<b>Total</b>	<b>166,568</b>	<b>467,720</b>	<b>100%</b>	<b>100%</b>

Table 10 shows that tourists organise their trips, or arrivals and overnight stays, themselves more often than engaging the services of travel agencies, except in 2016 when 59,242 (51.62%) arrivals were organised through travel agencies, 6.27% more than arrivals organised individually. Out of the total 261,379 recorded overnight stays, individual organisation accounts for 54.79%, while 45.21% of overnight stays were booked through an agency.

A big change in the organisation of arrivals and overnight stays is evident in 2019 when the number of agency arrivals and overnight stays is considerably lower than in 2016. Out of a total 166,568 arrivals and 467,720 overnight stays in 2019, arrivals and overnight stays organised individually accounted for 64.61% of arrivals and 72.50% of overnight stays, while agencies accounted for 35.39% of arrivals and 27.50% of overnight stays.

### 2.8. Average stay of tourists

The average stay represents the ratio of total overnight stays and arrivals and is an important indicator of the tourist destination's offer. Thanks to its geographical location, Rijeka is the central transit hub of the Kvarner Gulf, as evidenced by tourists staying for approximately two days.

Chart 7 – Total average length of stay in the 2009-2019 period

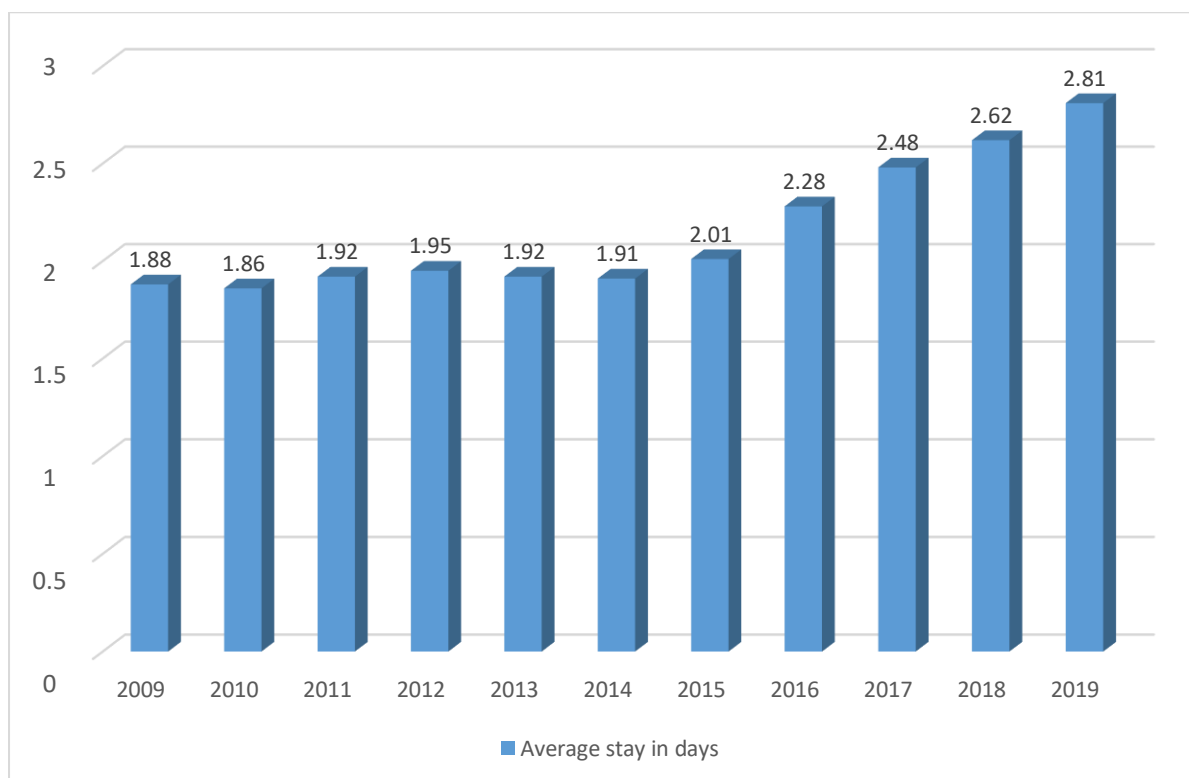


Table 11 – Total average length of stay by accommodation type in the 2009-2019 period

YEAR	Hotels	Campsite	Private accommodation	Hostels
2009	1.78	2.50	3.58	1.40
2010	1.72	2.55	3.63	1.41
2011	1.77	2.63	3.52	1.43
2012	1.78	2.46	3.96	1.48
2013	1.74	2.22	3.63	1.58
2014	1.78	2.25	3.19	1.56
2015	1.82	2.08	3.21	1.71
2016	1.79	-	3.20	1.73
2017	2.27	-	3.25	1.77
2018	2.33	-	3.24	1.89
2019	2.57	-	3.32	1.83

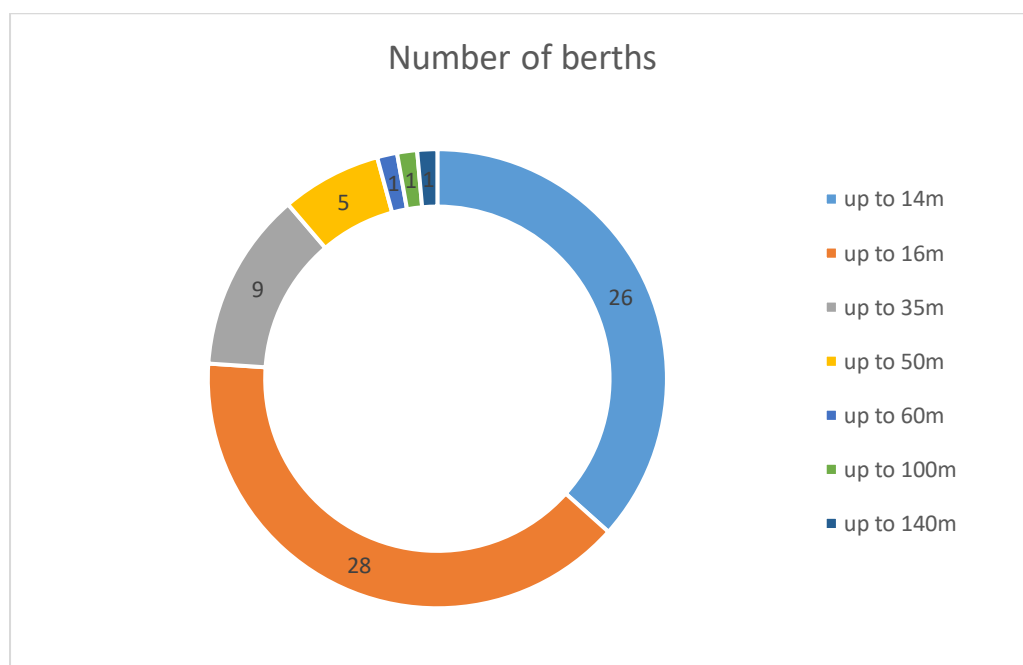
Looking at the average lengths of stay in Table 11 and Chart 7, the average length of stay of tourists has continuously increased, with slight deviations in 2010, 2013 and 2014. Over the years, the trend of the average length of stay has been relatively stable. In 2019, tourists stayed in the destination for an average of 2.81 days, the largest number in the period considered.

Taking 2019 as an example, Table 11 shows the different length of stay depending on the accommodation type. The longest average length of stay can be observed in the private accommodation category, longer than three days. Tourists record an average stay of 2.14 days in hotels and 1.78 days in hostels.

### 3. Nautical tourism

Nautical tourism is an economic activity based on activities and amenities connected to navigating the seas, rivers and lakes for tourism or recreational purposes. Nautical tourism in Rijeka has a positive trend, recording the greatest statistical increase in recent years and is considered to become one of the pillars of tourism in Rijeka in the coming years. The steadily increasing number of cruise ship and sailing vessel calls, as well as the number of passengers, shows that the Adriatic is an attractive destination for tourists, owing to its beautiful and preserved nature and coastal landscapes. Currently, boaters spend up to a day and a half in Rijeka. According to the latest recorded data from 2019, the total berth capacity for vessels in nautical tourism in the Port of Rijeka was 71, with further details displayed in the chart below:

Chart 8 – Berth capacity for vessels in nautical tourism in the Port of Rijeka in 2019



### 3.1. Nautical traffic, number of passengers and calls in the 2009-2019 period

Table 12 shows the number calls, or entries into the Port of Rijeka, as well as the total number of passengers for the boater tourist target segment.

Table 12 – Cruise ship and sailing vessel traffic in the 2009-2019 period

YEAR	CRUISE SHIPS		SAILING VESSELS	
	Number of calls	Number of passengers	Number of calls	Number of passengers
2009	0	0	231	6,940
2010	1	502	218	6,528
2011	0	0	212	7,216
2012	1	1,758	216	7,781
2013	1	685	220	7,124
2014	0	0	247	9,026
2015	7	9,082	222	7,971
2016	15	13,876	281	9,942
2017	15	12,656	263	10,582
2018	11	10,913	298	12,188
2019	24	41,139	345	12,759

Cruising is a type of nautical tourism business organised as a cruise trip on a vessel owned by a cruising company or a vessel procured and specially prepared for that purpose.

Looking at the cruising tourism data, it is possible to conclude that since 2015, there has been a significant increase in the number of calls, as well as in the number of passengers. The number of calls doubled in 2016 to 15 calls and 13,876 passengers, or a 52.79% increase in the number of passengers compared to the previous year. The same number of cruise ship calls was recorded in 2017, but with 9.64% fewer passenger arrivals. In 2018, there were 4 fewer cruise ships and 15.97% fewer passenger arrivals in the Port of Rijeka. During the period considered, the most cruise ship calls, or entries into the port, were observed in 2019, with 24 calls bringing a total of 41,139 passengers, which represents a significant and positive shift. Compared to the previous year, there were 13 more cruise ship calls in 2019 and a significant three-fold increase in the number of passengers.

The data on sailing vessels in the Port of Rijeka show fluctuations in the number of calls, with continuous growth occurring only from 2017. The least sailing vessel calls occurred in 2011 with 212 entries, while the most entries, 345, occurred in 2019. Comparing the 345 calls from 2019 with the previous year shows a 15.77% increase in sailing vessel calls. The number of passengers on sailing vessels in 2019 was 12,759, which is a 4.68% increase compared to the previous year. The number of sailing vessel arrivals fluctuates until 2015, after which there is a positive trend of growth in the number of passengers.

### 3.2. Nautical traffic in the 2016-2019 period by month

Nautical tourism experiences less seasonality than stationary (maritime-holiday) tourism, allowing for an extended season. Tourism in Croatia aims for an extended season, which nautical tourism provides. Data displayed in Table 13 is based on available indicators from the Port of Rijeka Authority.

Table 13 – Number of passengers on cruise ships and sailing vessels in the 2016-2019 period by month

MONTH	2016		2017		2018		2019	
	CRUISE SHIPS	SAILING VESSELS	CRUISE SHIPS	SAILING VESSELS	CRUISE SHIPS	SAILING VESSELS	CRUISE SHIPS	SAILING VESSELS
January	-	-	-	-	-	-	-	-
February	-	-	-	-	-	-	-	-
March	-	-	-	-	2,640	-	-	-
April		290	552	127	375	129	354	100
May	1,499	1,302	686	1,328	552	1,585	4,988	1,883
June	1,228	1,380	1,197	1,793	263	2,656	9,878	2,593
July	1,256	2,213	2,467	2,207	1,782	2,107	7,782	2,199
August	1,252	1,988	1,821	2,027	1,263	2,488	4,094	2,723
September	3,022	2,044	1,859	2,165	685	2,332	4,451	2,099
October	4,717	725	2,632	935	2,782	873	7,438	1,139
November	663	-	1,442	-	571	18	2,154	23
December	239	-	-	-	-	-	-	-
<b>TOTAL:</b>	<b>13,876</b>	<b>9,942</b>	<b>12,656</b>	<b>10,582</b>	<b>10,913</b>	<b>12,188</b>	<b>41,139</b>	<b>12,759</b>

Looking at the number of passengers between 2016 and 2019, it becomes evident that they mostly visit Rijeka between June and October. Based on the data from Table 13, it is possible to conclude that the largest number of cruise ship passengers arrived in the city of Rijeka in October. In 2019, the largest number of cruise ship passenger arrivals was in June. Compared to the number of passengers arriving in Rijeka by sailing vessel, the greatest number of calls is recorded in the summer months between June and August. Cruise ship and sailing vessel traffic is minimal between November and March.

The data shows a record number of calls and passengers in 2019, indicating the development of nautical tourism in the city of Rijeka. An even greater number of cruise ship calls and passengers is expected in 2020, when Rijeka will take over as the European Capital of Culture.

## 4. Annual financial indicators

Annual financial indicators were processed in this Analysis according to three basic tourism activities described in more detail in section 4.1. The three basic activities defined according to the national classification of activities (NKD) from 2007 are activity 55 – Accommodation, activity 56 – Food and beverage service activities and activity 79 – Travel agency, tour operator reservation service and related activities. In order to demonstrate the financial effect of tourism on the economy of Rijeka, this Analysis includes the total revenues, number of undertakings and number of employees. The Financial Agency (FINA) database was used as a source of data. The observed period refers to the 11-year period from 2009 to 2019.

### 4.1. Tourism activities

Undertakings register tourism activities in accordance with the National Classification of Activities (NKD) from 2007. Each activity is clearly and precisely described, enabling the quality distinction of the tourist category content and facilitating the methodological comparison of activities. The following is a short description of the tourism activities used to process financial data in this Analysis:

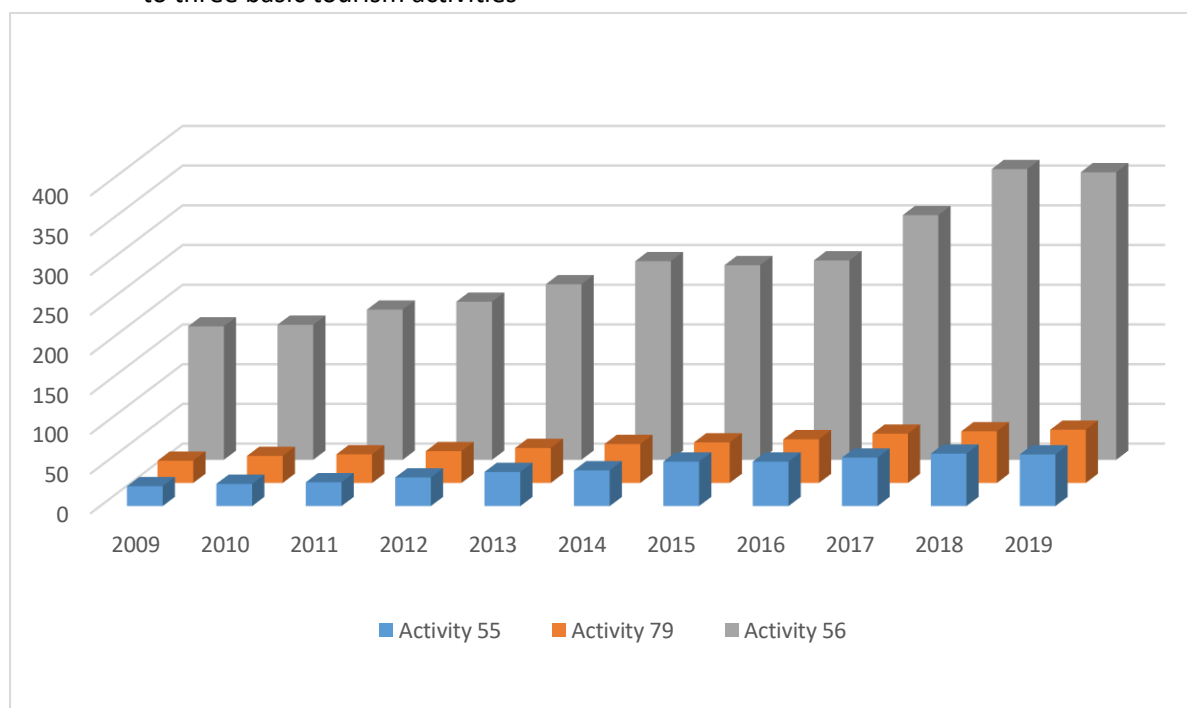
According to the NKD, section I refers to the ACCOMMODATION AND FOOD SERVICE ACTIVITIES, which includes activity 55 – Accommodation and activity 56 – Food and beverage service activities. Section N – ADMINISTRATIVE AND SUPPORT SERVICE ACTIVITIES include activity 79 – Travel agency, tour operator reservation service and related activities.

### 4.2. Total number of commercial entities

Table 14 – Total number of commercial entities between 2009 and 2019 according to three basic tourism activities

Activity	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019.
<b>55</b>	25	28	30	36	43	45	56	56	61	66	65
<b>56</b>	168	170	189	199	221	250	245	251	308	366	362
<b>79</b>	28	34	36	40	44	49	51	55	62	65	67
<b>Total:</b>	<b>221</b>	<b>232</b>	<b>255</b>	<b>275</b>	<b>308</b>	<b>344</b>	<b>352</b>	<b>362</b>	<b>431</b>	<b>497</b>	<b>494</b>

Chart 9 – Comparison of the total number of commercial entities between 2009 and 2019 according to three basic tourism activities



The data on undertakings according to three tourism activities, activity 55 – Accommodation, activity 56 – Food and beverage service activities and activity 79 – Travel agency, tour operator reservation service and related activities, show that the greatest number of undertakings is represented by activity 56 – Food and beverage service activities. Table 14 and Chart 9 also demonstrate that the number of commercial entities in all activities has increased since 2009, except for activity 56, with six fewer entities recorded in 2016 compared to the previous year. The decline is again observed in 2019, with four fewer business entities than in the previous year.

In 2019, the total number of commercial entities in all three tourism activities was 494, 273 more than in 2009. In 2019, 65 entities were registered in activity 55 – Accommodation, 362 entities were registered in activity 56 – Food and beverage service activities and 67 entities were registered in activity 79 – Travel agency, tour operator reservation service and related activities. The largest number of commercial entities was recorded in activity 56.

#### 4.3. Total number of employees in the tourism activities

Table 15 – Total number of employees between 2009 and 2019 according to three basic tourism activities

Activity	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>55</b>	272	277	260	245	201	221	229	228	247	221	293
<b>56</b>	996	964	930	955	1,107	1,215	1,208	1,341	1,542	1,393	1,473
<b>79</b>	107	114	138	119	144	178	184	181	185	182	202
<b>Total:</b>	1,375	1,355	1,328	1,319	1,452	1,614	1,621	1,750	1,974	1,796	1,968



The total number of employees in the three tourism activities decreased between 2009 and 2012, while the period between 2013 and 2017 experienced a positive trend of growth. The largest number of employees was in 2017 with a total of 1,974 people employed in tourism activities. In 2018, the number of employees was 1,796, which is a 9.02% decrease compared to the previous year. The number of employees increased again in 2019, with a 9.58% increase compared to the previous year.

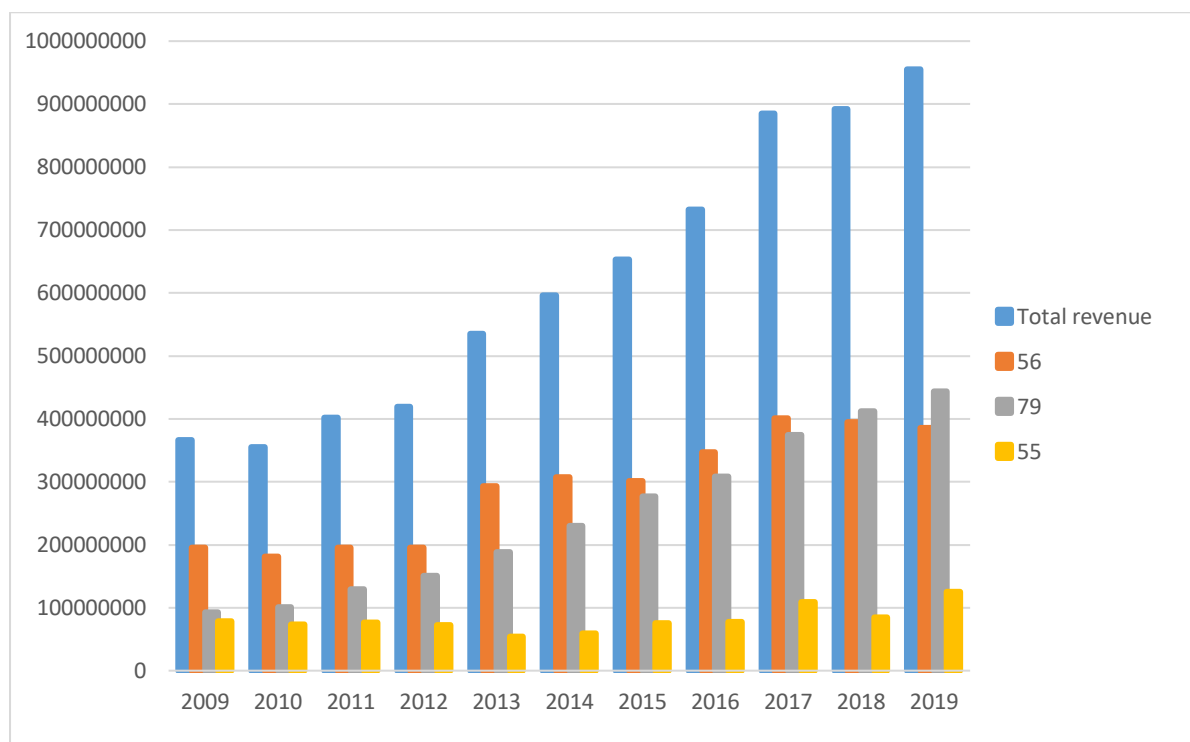
Looking at each activity individually, activity 55 – Accommodation experienced fluctuations in the period considered. In 2019, the number of people employed in this activity was 293, which was a 32.58% increase compared to the previous year. Fluctuations were also observed in activity 56 – Food and beverage service activities. From 2015 to 2017, the number of employees in this activity increased, followed by a 9.66% decrease in 2018 compared to the previous year. In 2019, the number of employees increased again by 80, or 5.74% compared to 2018. Activity 79 – Travel agency, tour operator reservation service and related activities mostly experienced an increase in the number of employees, except for 2012, 2016 and 2018 when there was a slight decrease in the number of people employed in this activity. In 2019, the number of people employed in this activity was 202, which was an 11% increase compared to the previous year.

#### 4.4. Total tourism revenues

Table 16 – Total tourism revenues for the 2009-2019 period according to three basic activities

Year	55	56	79	Grand total:
2009	78,055,580	195,524,970	92,879,733	366,460,283
2010	73,658,436	181,152,224	100,618,246	355,428,906
2011	76,763,058	195,271,860	129,490,016	401,524,934
2012	72,784,420	195,818,685	150,581,694	419,184,799
2013	54,232,283	292,557,573	188,548,765	535,338,621
2014	59,226,540	307,514,001	229,619,724	596,360,265
2015	74,981,976	301,143,782	277,280,351	653,406,109
2016	77,709,737	347,185,418	308,010,186	732,905,341
2017	109,367,038	401,247,549	374,144,138	884,758,725
2018	85,023,639	394,846,206	411,983,548	891,853,393
2019	125,580,207	385,933,113	444,072,097	955,585,417

Chart 10 – Comparison of total tourism revenues for the 2009-2019 period according to three basic activities



The total revenues followed the positive growth trend of the tourism indicators until 2019, when the total revenues amounted to HRK 955,585,417. Due to the increased number of commercial entities, the total revenues in 2019 increased by HRK 63,732,024, or 7.15% compared to the previous year. When comparing the total revenues in 2019 with the total revenues in 2009 (Chart 10), it is evident that the total revenues in tourism have increased by almost three times.

Looking at the total revenue according to activity, activity 79 – Travel agency, tour operator reservation service and related activities experienced an increase in revenue each successive year, culminating in 2019 with the highest total revenues compared to activity 55 – Accommodation and activity 56 – Food and beverage service activities. That same year, activity 79 – Travel agency, tour operator reservation service and related activities generated HRK 444,072,097 in total revenue, a 7.79% increase compared to the previous year. The total revenues of activity 55 – Accommodation experienced fluctuations in the reported period. In 2013, there was a significant decrease in the total revenues of 25.49% compared to the previous year, with another decrease in 2018, when after a period of continuous increase between 2014 and 2017, the total revenues decreased by 22.26% compared to the previous year. In 2019, activity 55 – Accommodation experienced a renewed increase of 47.70% compared to 2018. Activity 56 – Food and beverage service activities experienced an increase in the total revenues between 2011 and 2014. In 2015, there was a 2.07% decrease in the total revenues compared to the previous year, as well as in 2018, when the revenues decreased by 1.59% compared to the previous year. In 2019, the total revenues of this activity decreased further by 2.26% compared to the previous year. The decline in revenues in these activities was accompanied by a decline in the number of employees displayed in section 4.3. Total number of employees in tourism activities.

#### 4.5. Total investment in tourism of the city of Rijeka

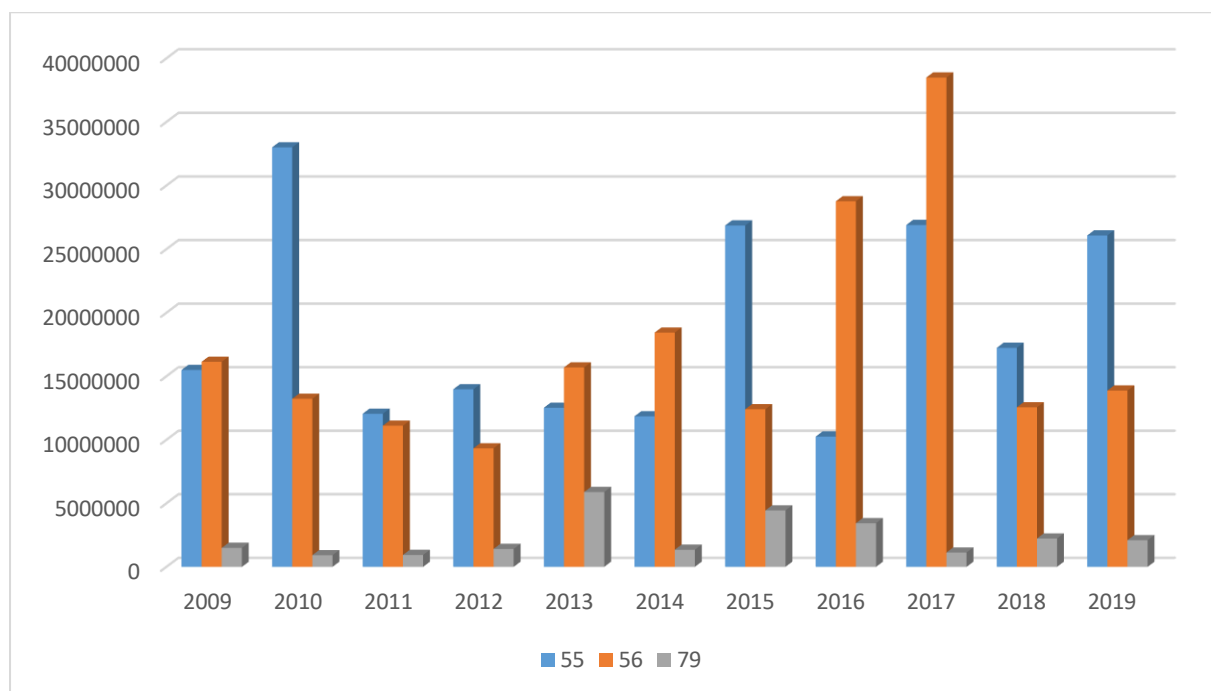
The following is an overview of investments by undertakings in the three basic tourism activities: activity 55 – Accommodation, activity 56 – Food and beverage service activities, activity 79 – Travel agency, tour operator reservation service and related activities. The average annual investment in the tourism of the city of Rijeka in the period considered amounted to HRK 38.32 million. It is possible to conclude that tourism workers invested hundreds of millions of HRK in long-term assets while improving their own business, as well as international competitiveness. Looking at the data from Table 17, it is possible to conclude that the most investments in tourism were made in 2017, when a total of HRK 66.51 million was invested in tourism, representing a significant 56.67% increase in investments compared to the previous year.

Table 17 – Total investment in the tourism of the city of Rijeka for the 2009-2019 period according to three basic activities (in HRK millions)

Activity	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
55	15,494	33,001	12,050	13,976	12,523	11,851	26,860	10,257	26,899	17,239	26,077
56	16,138	13,226	11,113	9,327	15,694	18,434	12,409	28,766	38,492	12,556	13,877
79	1,495	0,918	0,938	1,413	5,891	1,344	4,441	3,434	1,125	2,231	2,098
<b>Total</b>	<b>33,127</b>	<b>47,145</b>	<b>24,102</b>	<b>24,715</b>	<b>34,107</b>	<b>31,629</b>	<b>43,710</b>	<b>42,457</b>	<b>66,516</b>	<b>32,026</b>	<b>42,052</b>

Table 17 displays the total investment in tourism of the city of Rijeka in HRK million. The table also shows that the most investments in tourism were made in 2017 in activity 56 – Food and beverage service activities (HRK 38.49 million). Chart 11 shows the ratio of investments in the three tourism activities. The most investments were made in activity 55 – Accommodation and activity 56 – Food and beverage service activities. Activity 55 – Accommodation had the most investments in 2010 with HRK 33.00 million. In terms of activity 79 – Travel agency, tour operator reservation service and related activities, it is evident that in Rijeka's surrounding area, the least investments are made in travel agencies, which is corroborated by earlier data revealing that tourists mainly organise their trips by themselves. The largest amount invested in travel agencies was in 2013, with HRK 5.89 invested.

Chart 11 – Comparison of total tourism investments for the 2009-2019 period according to three basic activities



#### 4.6. Average net salaries in the tourism sector

In addition to investing in property as one of the ways to improve business and tourism competitiveness, it is also important to invest in employees, as evidenced by the data in Table 18.

Table 18 – Average net salaries in tourism for the 2009-2019 period according to three basic activities

Activity	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
55	4,561	4,456	4,575	4,499	4,315	4,219	4,097	4,328	4,387	4,919	5,471
56	2,796	2,784	2,699	2,642	3,249	3,281	3,276	3,482	3,389	3,362	3,644
79	4,079	4,042	4,393	4,640	4,461	5,022	5,129	5,297	5,168	5,330	5,977

Table 18 shows the average net salaries according to each of the three main tourism activities. Looking at the data in this Analysis, it is possible to conclude that the highest net salaries are in activity 79 – Travel agency, tour operator reservation service and related activities, and the lowest in activity 56 – Food and beverage service activities. Furthermore, the largest net salaries in all three activities were recorded in 2019. Activity 79 – Travel agency, tour operator reservation service and related activities recorded an average net salary of HRK 5,977 in 2019, which is a 12.14% increase compared to the previous year. The net salaries in activity 56 – Food and beverage service activities also experienced an increase in 2019 in the amount of 8.39% compared to the previous year, while activity 55 – Accommodation recorded an 11.22% increase in the average net salaries compared to 2018.

## 5. Comparative analysis of tourism revenue indicators

### 5.1. Comparison of the total revenues with the total number of overnight stays

Given the available databases, there are two significant links between physical and financial performance indicators in tourism activities. Comparing the total tourism revenues with the total number of overnight stays, it is possible to establish a connection to the stable growth in the number of tourists, generating more revenue each successive year.

Chart 12 – Comparison of the total revenues with the total number of overnight stays in the 2009-2019 period

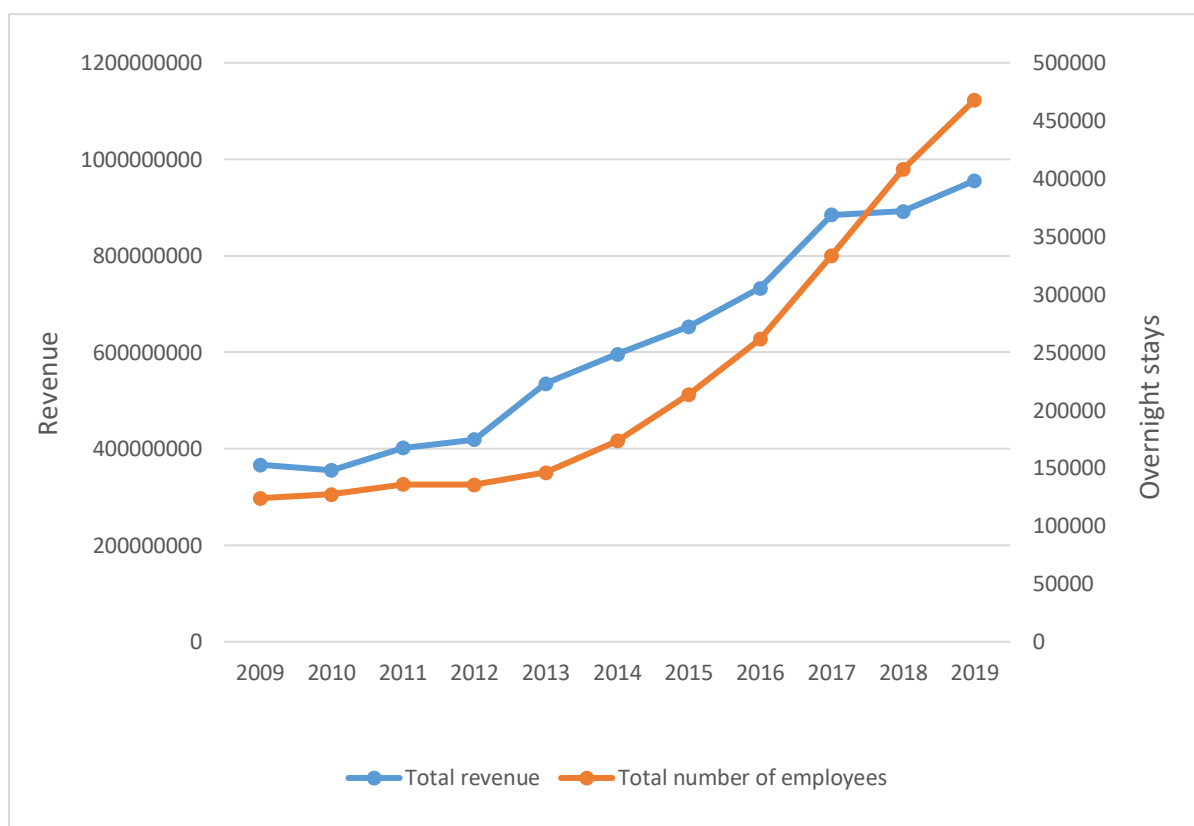


Chart 12 shows that the number of overnight stays is constantly increasing, and thus generating revenues that have also been growing continuously since 2010. A significant increase in the total revenues occurred in 2013 and 2017, when the number of overnight stays increased by 27.63% and the total revenues by 20.72% compared to 2016.

## 5.2. Comparison of the total revenues with the total number of employees

Planning for the further strategic development of tourism in Rijeka has a strong foundation in the existing trends that are expected to continue in the coming years and strengthen in parallel with the recovery of the economy and consumer purchasing power. The following is a comparison of the total revenues with the total number of employees, showing a clear correlation between the two.

Chart 13 – Comparison of the total revenues with the total number of employees in the 2009-2019 period

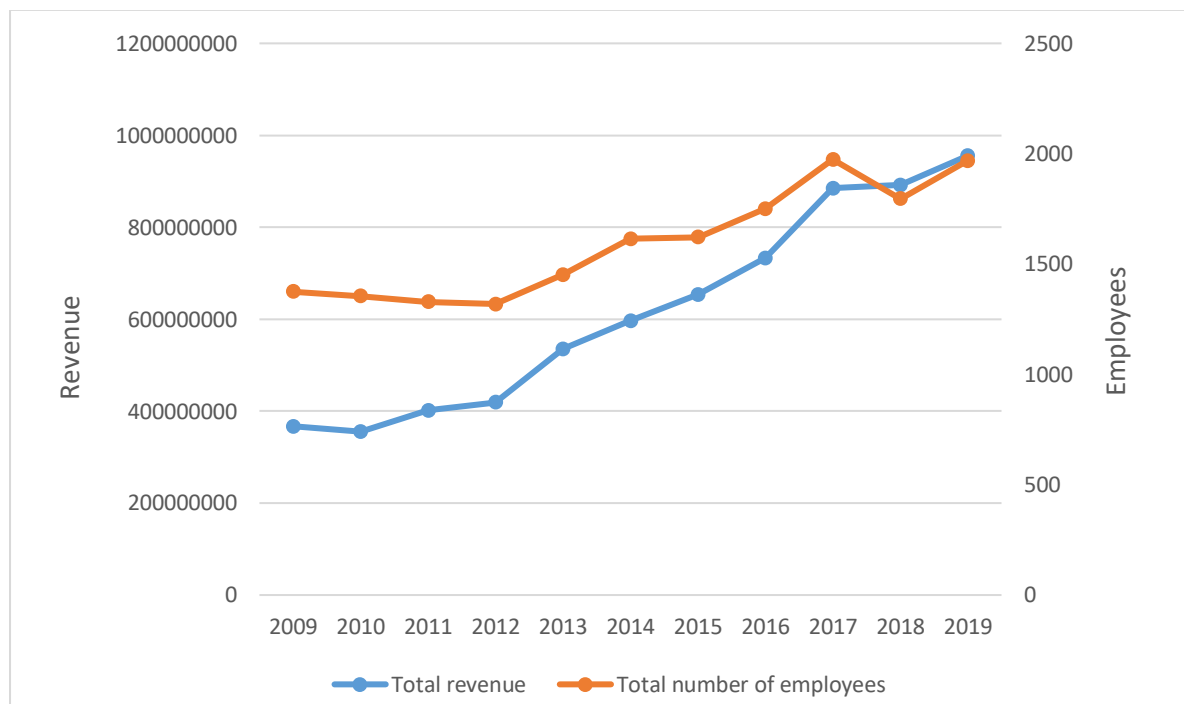


Chart 13 shows that until 2014, the number of employees was higher than the revenue generated. The situation stabilised in 2015 and revenues increased with regard to the number of employees. This is the result of the increased tourism offer in the city of Rijeka across all segments. Improving the tourist offer by providing additional facilities and activities, as well as increasing the capacities for accommodation creates additional value, which eventually results in a greater number of undertakings participating in the tourism sector, and with it a greater need for employees in the different sections of the tourism sector. The Chart shows the connection between the total revenues and the total number of employees. The total number of employees increased from 2012 to 2017 by 1,796 employees. In 2018, the total number of employees decreased by 9.02% compared to the previous year but returned to its 2017 numbers in 2019. Unlike the total number of employees, the total revenues have been continuously increasing over the reported period.

## 6. Conclusion

The city of Rijeka recorded a stable and continuous increase in the number of beds across all categories in the period between 2009 and 2019. In 2019, there were a total of 8,280 beds available. In the period considered, private accommodation experienced the greatest changes in accommodation capacities, with 5,273 beds in 2019 and a 30-fold increase compared to 2009. Private accommodation accounted for the greatest number of beds in the period considered (44%), followed by hotels (18%), inns (12%), hostels (10%), university campuses and secondary school dormitories (9%), and campsites (7%).

The total arrivals of domestic and foreign tourists experienced a continuous increase except in 2012. The greatest number of arrivals was recorded in 2019 with 166,568 arrivals. The number of arrivals increased two-fold compared to 2009. The number of foreign tourist arrivals continuously increased, except in 2012. The largest number of foreign tourist arrivals was recorded in 2019 with 135,191 arrivals, which is a two-fold increase compared to 2009. Domestic tourist arrivals recorded fluctuations in the period considered. The largest number of domestic tourist arrivals was recorded in 2019, with 31,377 arrivals, representing a 72.04% increase compared to 2009.

A continuous increase of domestic and foreign tourist overnight stays was observed since 2014. The greatest number of overnight stays in the period considered was recorded in 2019, with 467,720 overnight stays, which is a three-fold increase compared to 2009. The number of foreign tourist overnight stays has been continuously increasing since 2009. In 2019, foreign tourists accounted for 387,947 overnight stays, a four-fold increase compared to 2009. Domestic tourist overnight stays in the period considered recorded slight fluctuations between 2009 and 2017. The greatest number of domestic tourist overnight stays was recorded in 2019 with 79,773 overnight stays, which represents a two-fold increase compared to 2009. Each year, foreign tourists account for a greater number of overnight stays compared to domestic tourists. In 2019, foreign tourist overnight stays accounted for 82.94% and domestic tourist overnight stays for 17.06% of the total number of overnight stays.

In the period observed, tourists from Italy accounted for the largest number of arrivals and overnight stays with 150,091 arrivals and 296,253 overnight stays. Tourists from Germany are second with 87,901 arrivals and 246,248 overnight stays. Other significant markets in terms of the number of arrivals include Spain, France, Austria, Hungary, USA, Korea, Great Britain and Bosnia and Herzegovina. In terms of overnight stays, Germany is followed by tourists from Spain, France, Bosnia and Herzegovina, Hungary, USA, Austria, Poland and Serbia.

Private accommodation ranks first in terms of the total number of arrivals and overnight stays in the period considered. In 2009, the share of private accommodation accounted for 4.38% of the total arrivals and 8.30% of the total overnight stays, while in 2019 the share was 47.94% and 56.74% respectively. Hotels followed in second place. In 2009, hotels accounted for 75.81% of arrivals and 71.66% of overnight stays, and 33.06% of arrivals and 21.43% of overnight stays in 2019. Hostels, non-commercial accommodation and inns followed.

According to age structure, tourists aged 19-30 accounted for the greatest number of arrivals and overnight stays in 2019, with a share of 23.80% in arrivals and 25.32% in overnight stays.

Tourists organise their arrivals and overnight stays themselves more often than using the services of travel agencies. In 2019, 64.61% of arrivals and 72.50% of overnight stays were organised individually. Tourists usually stay for an average of two days. In 2019, tourists stayed for an average of 2.81 days,

the largest number in the period considered. The longest average length of stay is recorded in the private accommodation category, which is longer than three days.

A significant increase in the number of calls and passengers on cruise ships has been recorded since 2015. During the period considered, the most cruise ship calls were observed in 2019, with 24 calls bringing a total of 41,139 passengers. An increase in the number of calls and passengers on sailing vessels has been observed since 2017. Sailing vessels recorded the greatest number of entries in 2019, with 345 calls and 12,759 passengers. Tourists mainly visit Rijeka between June and October.

The greatest number of commercial entities in all three activities was recorded in 2018 with 497 entities, a two-fold increase compared to 2009. The greatest number of entities was included in activity 56 – Food and beverage service activities. The total number of employees fluctuated in the period between 2009 and 2019. The largest number of employees was in 2017 with a total of 1,974 people employed in tourism activities, or a 43.56% increase compared to 2009. The greatest number of people was employed in activity 56 – Food and beverage service activities.

The total revenues followed the positive growth trend of the tourism indicators until 2019, when they amounted to HRK 955 million. In 2019, the total revenues increased by HRK 63 million, or 7.15% compared to the previous year. Activity 79 – Travel agency, tour operator reservation service and related activities generated the most revenue. The total revenues followed the growth trend of overnight stays until 2019. A significant increase in the total revenues occurred in 2013 and 2017, when the number of overnight stays increased by 27.63% and the total revenues by 20.72% compared to 2016. Compared to the total number of employees and total revenues, which experienced a continuous increase, the number of employees decreased in 2018 by 9.02% compared to the previous year before returning to its 2017 numbers.

The average annual investment in the tourism of the city of Rijeka in the period considered amounted to HRK 38.32 million. The largest investment in the tourism sector was in 2017, when the total investments amounted to HRK 66.51 million, a two-fold increase compared to 2009. Activity 55 – Accommodation had the most investments.

Activity 56 – Food and beverage service activities recorded the largest average net salary in 2019 at HRK 3,644. The largest average net salaries in activity 79 – Travel agency, tour operator reservation service and related activities and activity 55 – Accommodation were also recorded in 2019, at HRK 5,977 and HRK 5,471 respectively.

In conclusion, the tourism sector of the city of Rijeka experienced good results, with Rijeka continuing its development as an attractive tourist destination.

With the arrival of 2021, the strategic document of the City of Rijeka – the Strategic Development of the City of Rijeka for the 2014-2020 Period – ceases to be valid. During this period, the city underwent numerous and significant changes, and positioned itself as a smart city, providing excellent working and living conditions. For Rijeka to continue developing in this direction, a new strategic document is being developed to serve as a blueprint for the city's development during the period between 2021 and 2027. The document should focus on reducing its environmental impact and climate change mitigation through compliance with the European Green Deal. Another area of focus is continuing the digitalization trend through the implementation of solutions based on new technologies.



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