

## KEY COUNTRIES FOR TOURISM IN THE NEW EUROPE

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**Abstract.** *The tourism industry in the New Europe, region represented by the New Member States of the European Union (the thirteen countries that acceded the European Union after 2004) was highly influenced by the European integration process. The European Union policies and guidance, as well as market oriented policies, have had a great impact on tourism development in Central, East, and Southeast Europe. Schengen Agreement is one of the greatest advantages brought by the membership of the European Union, as it ensures market openings, visa policies harmonisation, easier border crossing procedures and free movement of persons. Besides, people's curiosity and tendency to explore new destinations, non-traditional and unique places, the lower prices compared to the West, the increasing global interest in tourism, the higher wages and standard of living or the more frequent business-related trips contributed to the 20.5% increase in the number of EU arrivals in the New Member States in the period 2007-2015. The topic of the tourism sector in the Old Member States has been intensively researched, but incomparably less study has been undertaken for the case of the New Member States. Therefore, this paper provides an examination of tourism in the New Member States of the European Union. Data such as the number of international arrivals or overnight stays, number of tourism establishments and bed places in tourism establishments are considered to be one of the most relevant indicators for measuring a country's competitiveness in tourism and will be the basis of our research. To capture various perspectives and create a comprehensive paper, the research methodology will be multi-method, including both secondary and primary sources of data. European tourism has undergone significant changes in the past years, and sustainable tourism has become one of the key issues in the sector. In this regard, major trends, threats, and opportunities for tourism in the European Union will be sketched, as the paper to better serve not only participants in the academic community, practitioners in the tourism business or the financial market parties and consultants, but any individual with an interest in this topic.*

**Keywords:** *New Europe; the New Member States; tourism trends; marketing strategies; tourism marketing.*

### Introduction

Since 2004, the European Union has expanded its economic and territorial space towards Central, Eastern, and South-Eastern Europe. Three new accession waves took place (in 2004, 2007 and 2013) and tourism is one of the sectors most impacted by this expansion. The latest report published by the World Tourism Organization – UNWTO - (2016, p.7), highlights that 51% of the international tourist arrivals (5% increase in 2015 compared to 2014) and 36% of the international tourism receipts were recorded in Europe (3% increase in 2015 compared to 2014), Europe currently being the most important continent for tourism, both in terms of incoming and outgoing tourist flows.

Plus, roughly 80% of the international tourist arrivals and approximately 83% of the international tourism receipts in Europe were reported in the EU-28.

As per the latest publication from Eurostat (Bourgeois & Lewczuk, 2017), in absolute terms, Spain, Italy, France and the United Kingdom recorded the highest number of nights spent by non-residents at the destination, but, in terms of percentage increases, four of the New Member States performed best, namely Bulgaria (approximately 18% increase), Slovakia (up 16%), Poland (roughly 12% increase), and Cyprus (approximately 11% increase). The only countries that reported smaller figures compared with the previous year were France and the UK, most probably as a consequence of terrorist attacks and threats.

Hence, this paper aims to provide an analysis of tourism sector in the thirteen New Member States (NMS-13) of the European Union, focusing on the countries identified as key destinations. Indicators such as the number of international tourist arrivals or overnight stays, number of tourism establishments and bed places in tourism establishments are taken into consideration in order to identify the most important countries for tourism among the region indicated, Central, Eastern, and South-Eastern Europe.

The main research questions this paper is based on are: Which of the New Member States performed best tourism-wise in the period 2007-2015? What type of tourism and tourism products do these countries offer? Which are the main sources of tourists for the countries identified? Are there any particularities regarding the tourism sector in these countries? In order to be able to answer these questions, the paper will be structured as follows: it will start with a brief overview of the current state of the literature on this topic, section followed by a presentation of European Union programs and policies in the travel and tourism field. A quantitative analysis precedes, this enabling us to identify the key countries for tourism in the NMS-13, for which specific trends, factors, and touristic offerings will be depicted.

## Literature review

The latest Travel & Tourism Council Report (2016) reveals that the total contribution of the tourism sector to the New Member States region's GDP is approximately 12%, while the direct contribution of tourism to the area's GDP is roughly 5%. Forecasts are positive and predict that the travel and tourism sector's direct contribution in the next decade in the NMS-13 will grow by 2.8%, which outperforms the growth rate for the whole Europe – 1.9%.

According to Weiermair (2003), e-tourism expansion and increasing competition that enabled product offerings innovation are some of the factors that led to the recent tourism boost in the region, together with exchange rates fluctuations, deregulation of international air transport and the development of low-cost airlines, event particularly frequent in Europe (Sharpley & Telfer, 2015) or even the changes in income (higher standard of living) and lifestyle, as travel has become more popular and is being perceived as a mean to “escape” daily routine or a stressful living (Hudman & Jackson, 2003, p.25).

The European Union Barometer on Europeans preferences towards tourism (European Commission, 2015) indicated that sun and beach tourism is the main motivation for travel in the European Union, followed by visiting friends or relatives. Additionally, the main reason for choosing the same holiday destination is represented by the natural features of that place. On average, more than 70% of the European Union citizens are travelling for at least one night, this percentage increasing yearly. A trend towards holidays outside one's country of residence has also been identified, but the final destination is still a place located in the European Union, only one-fifth of the Europeans spending their main holiday outside the European Union territory.

Studies referring to the evolution of tourism in Central and Eastern Europe address it from various perspectives: political, strategic, branding, investments etc. A selective collection of works includes: Aubert et al. (2015), Copacenaru (2017), Dinu and Zbucea (2010), Hall (2011), Rosenbaum (2015). Most of the research included in the mainstream literature concentrate on specific destinations and forms of tourism. Little focus has been put on the entire region, including comparative research.

### **European Union bodies & policies in the travel and tourism field**

Even though tourism's contribution to the economy has been increasing over the last decades, it has been just recently that the European bodies started to pay attention to this sector. It cannot be discussed about a genuine common tourism policy at EU level, but rather about a series of policy initiatives and strategies for tourism, mainly sets of actions and directions at the national level, that European Commission has published since 2001. This particularity is seen by some scholars, as for example by Halkier (2010) as one of the main weaknesses of the EU tourism industry. Another important challenge for the European tourism is represented by the behavioural, technological and demographic changes that are currently taking place, as the elderly population, people over 65, is expected to reach 20% of the total EU population by 2020. Social, political and environmental security, safety and quality of food and accommodation establishments or socio-cultural sustainability are also considered as key challenges for tourism in the EU (Bâc, 2012), but issues such as seasonality, taxation, and regulations in the tourism sector, the difficulty of finding and retaining skilled staff or bureaucracy should not be neglected either (Fouloy, 2015). To overcome these threats and any other that might occur in the tourism sector, the European Commission adopted in autumn 2011 a strategy called "Europe, the world's no. 1 tourist destination – a new political framework for tourism in Europe", initiative that focuses on four main goals: "to stimulate competitiveness in the European tourism sector, to promote the development of sustainable, responsible, and high-quality tourism, to consolidate Europe's image as a collection of sustainable, high-quality destinations, to maximise the potential of EU financial policies for developing tourism" (European Commission, 2010, p.7).

Taking everything into consideration, it can be concluded that European Union bodies are more and more aware of tourism sector's importance for the economy, but the Member States should also be more actively involved, more open and willing to cooperate not only with the European Institutions but also among themselves for their common well-being. Continuous efforts should be made in order for the NMS-13 to be able to align to the developed countries' level of quality and prestige, to increase

tourists' confidence in the products offered, to identify and exploit their competitive advantages, and be able to compete with key players in the market.

In the sections that follow, a quantitative analysis for the countries in the region will be conducted in order to determine the most important countries and destinations for tourism among the New Member States. These will be then discussed in more detail, from a perspective that includes specific trends, factors, and touristic offerings.

### **Context and methodology**

Approximately 80% of the total arrivals in Europe (609 million tourist arrivals in 2015 according to the latest UNWTO Report (2016)) can be attributed to EU-28 and roughly 15% to the New Member States, which are, after the date of accession, in chronological order, the following: Czech Republic, Cyprus, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia in 2004, Bulgaria and Romania in 2007, Croatia in 2013. The main source of data for these countries was Eurostat, but, whenever information was missing, statistics were collected from the World Tourism Organization.

After studying different research papers related to tourism and based on the availability of data, we found that, in order to be able to identify the key countries for tourism in the New Europe and to determine specific trends, factors and touristic offerings that make these successful, the following indicators were relevant:

- number of arrivals and number of overnight stays – these two related indicators include visitors entering the economic area of the Member States taken into consideration. The number of arrivals includes tourists and same-day non-resident visitors. Additionally, the overnight stays correspond to the number of nights spent by guests, non-resident tourists in all kinds of accommodation establishments (hotels, holiday and other short-stay accommodation, camping grounds, recreational vehicle parks and trailer parks).
- number of tourism establishments and number of bed places in tourism establishments – a tourist accommodation establishment is a local kind-of-activity unit providing as a paid service (although the price might be partially or fully subsidised) short-term or short-stay accommodation services. The number of bed places is determined by the number of persons who can stay overnight in the beds set up in the establishment, ignoring any extra beds that may be set up upon customer request

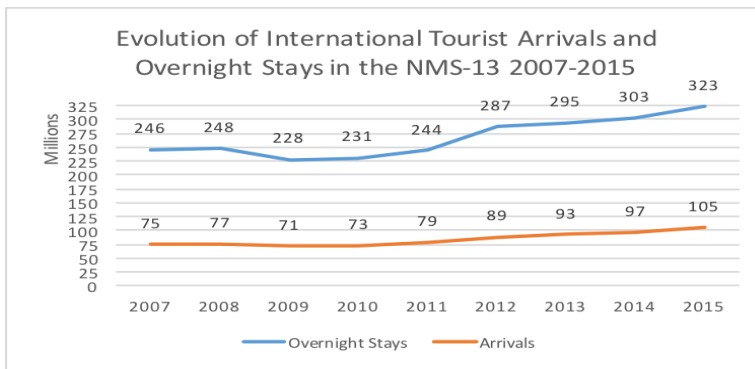
The number of arrivals and overnight stays was considered to be relevant for countries' popularity and attractiveness. As per Dupeyras and MacCallum (2013, p.22), "measuring visitor numbers is a direct and objective means of assessing success in tourism, with the difference between one year's figure and the next being a transparent and easily conveyed way of showing growth or decline". On the other hand, the number of tourism establishments and of bed places in tourism establishments are important indicators which reflect the potential of tourism consumers and measure the tourism phenomena (Balan & Birsan, 2010). We will analyse time series, because, as a year-on-year indicator, growth in number of arrivals and overnight stays reflect international appeal and awareness, while the evolution of tourism establishments and number of bed places indicate the tourism business sector advancement and help us identify trends more easily.

## Main statistical findings

In this section we will analyse the tourism statistical indicators previously mentioned, with the purpose to identify the countries with the biggest number of arrivals and overnight stays, but also the Member States with the largest number of tourism establishments and bed places in tourism establishments, more precisely the key countries for tourism in the New Europe.

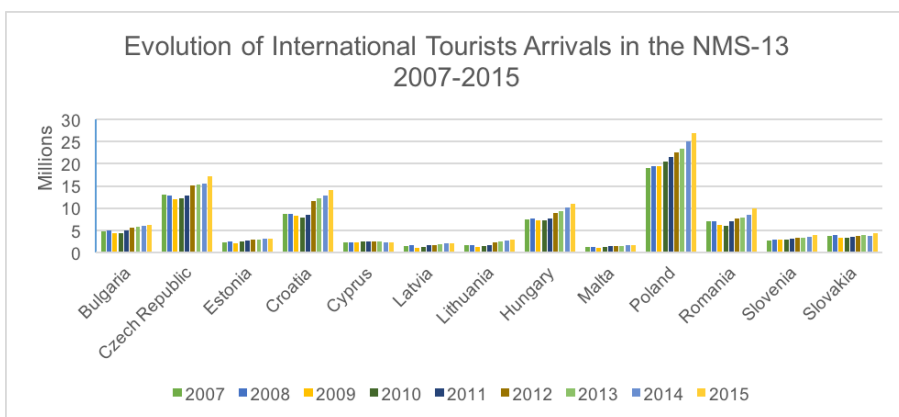
### *International tourist arrivals and overnight stays in the NMS-13 2007-2015*

According to Eurostat (2017), the number of international arrivals in the NMS-13 increased 1.4 times in 2015 compared to 2007, from 75 million international arrivals to 105.5 million tourists, while the number of overnight stays follows a similar trend, rising 1.3 times in 2015 compared to 2007. The evolution of these two indicators is presented in Figure 1.



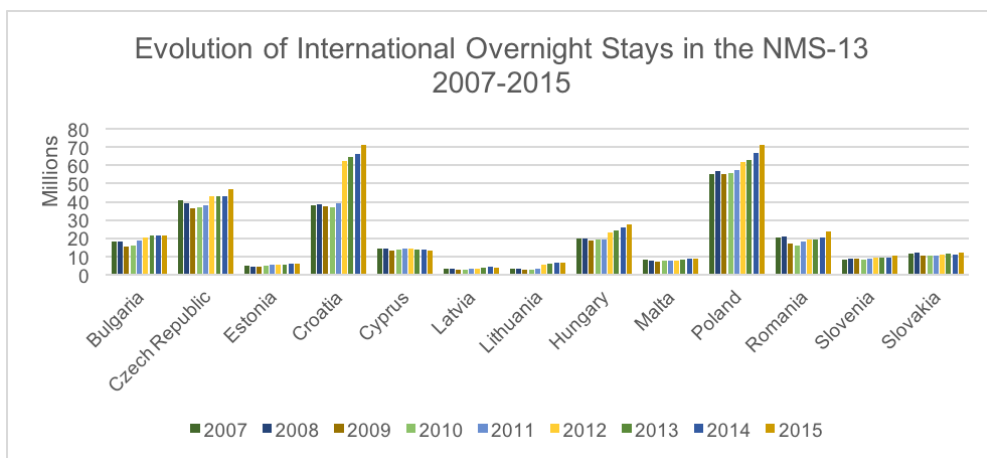
**Figure 1. Evolution of International Tourist Arrivals and Overnight Stays in the NMS-13 2007-2015 (author's conception, based on data from Eurostat)**

The international tourist arrivals for the period 2007-2015 are illustrated year-by-year for all the countries in the region in Figure 2.



**Figure 2. Evolution of International Tourist Arrivals in the NMS-13 2007-2015 (author's conception, based on data from Eurostat)**

In the period 2007-2015, the number of international tourist arrivals was the highest in Poland (247.7 million arrivals), Czech Republic (138.5 million arrivals) and Croatia (116.6 million arrivals), while in terms of number of overnight stays in the NMS-13 in the period 2007-2015 (illustrated in Figure 3), the top is pretty similar to the previous one, Poland ranking first, 542.4 million overnights, followed by Croatia, 454.7 million overnights, and Czech Republic, 368.5 million overnights.

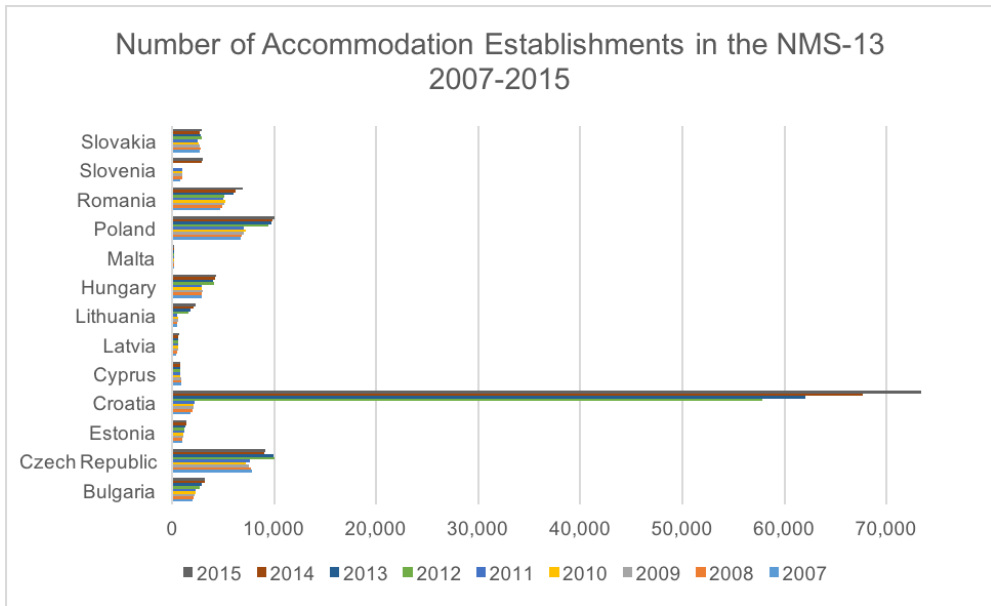


**Figure 3. Evolution of International Tourist Arrivals in the NMS-13 2007-2015 (author's conception, based on data from Eurostat)**

Considering the results provided by the number of international tourist arrivals and the number of international overnight stays, it can be noticed that Poland, Czech Republic, and Croatia are key countries for tourism in the New Europe.

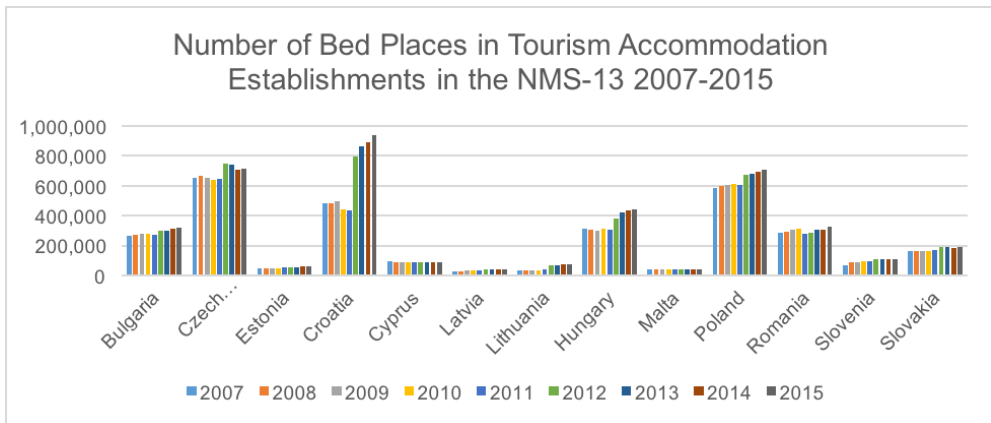
### ***Number of tourism establishments and number of bed places in tourism establishments in the NMS-13 2007-2015***

In what regards the number of accommodation establishments and bed places in accommodation establishments in the time-frame considered, looking at Figure 4 and Figure 5, it is easily noticeable that Croatia, Poland, and the Czech Republic are the countries with the highest development level among the New Member States. However, it must be mentioned, that the huge increase in the number of establishments that can be noticed for the year 2012 in Croatia is probably related to the changes in scope or revised reporting methodologies (Eurostat, 2017). In terms of accommodation establishments, this sector increased by almost 1.5 times in Poland and by roughly 20% in Czech Republic (for Croatia a 4 times boost was reported) in 2015 compared to 2007, while the number of bed places in tourism accommodation establishments was the largest in the Czech Republic – 6.2 million bed places, Croatia – 5.8 million bed places and Poland – 5.7 million bed places.



**Figure 4. Number of Accommodation Establishments in the NMS-13 2007-2015 (author’s conception, based on data from Eurostat)**

All the indicators considered, the number of international arrivals, the number of international overnight stays, the exports in travel and the number of accommodation establishments and number of bed places in accommodation establishments pointed out that the same three countries, namely that Poland, Czech Republic, and Croatia were key countries for tourism in the New Europe in the period 2007-2015.



**Figure 5. Number of Bed Places in Tourism Accommodation Establishments in the NMS-13 2007-2015 (author’s conception, based on data from Eurostat)**

**Key countries for tourism: Poland, Czech Republic, and Croatia**

In this section, the three Member States identified as key countries for tourism in the New Europe will be analysed from the tourism industry point of view. Main sources of

tourists, the most important destinations, types of tourism, branding and tourism policies in place are some of the features that will be approached.

### ***Poland***

As per the Organization for Economic Co-operation and Development (2016, p. 250), tourism's contribution to Poland's GDP is approximately 5%, and the number of international tourists arrivals is increasing yearly. Hence, Poland was the 16<sup>th</sup> most visited countries in the world in 2015 (Salamanca, 2015) and the 10<sup>th</sup> in Europe (World Tourism Organization, 2016). According to Euromonitor International (2016), the main reasons for which Poland's tourism sector is so successful are: the well-developed air travel industry – the number of passengers travelling by air to and from Poland is expected to triple (Goettig, 2017), the diversified and of good quality accommodation establishments, conferences infrastructure, but also the country's stable economic and political environment. E-tourism is also well advanced and provides great opportunities for the tourism business environment in Poland.

The marketing campaigns currently on going in Poland are relevant examples of “best practices” not only for the European travel and tourism industry but at international level. Poland's tourism strategy in place focuses on competitiveness, innovation, and sustainable development. For the period 2007-2015, business tourism was the centre of attention for Poland, followed by urban and cultural tourism, rural tourism, recreational and active tourism. For the same period, the Polish Tourism Organization prepared the “Marketing Strategy in Polish tourism sector”, a document that set directions and forms of actions in the Polish tourism sector. Conferences, congresses and business travel, tourist products that belong to business tourism were aimed attention at, followed by religious tourism, health tourism (wellness and spa), urban and cultural tourism, rural tourism (ecotourism and agro-tourism), recreational tourism (sea and sand, mountains, lakes, hiking) and active tourism (horse riding, cycling – supported by the EuroVelo Carpathian Cycle Route, winter sports, windsurfing, sailing) (Piotrowski, Soliński, Pacholska, & Warzybak, 2010, p. 16).

According to OECD (2016, p. 253), the main source markets for the inbound tourism in Poland are Germany, Ukraine, Russian Federation, Belarus, and Lithuania, with Warsaw and Krakow ranking 73<sup>rd</sup> and 75<sup>th</sup> in the Top 100 City Destinations Ranking (Geerts, 2017). Małopolska, region that includes Cracow, the historical capital of Poland and the Auschwitz concentration camp is the most visited region in Poland according to Eurostat regional database. Some of the main programs and initiatives for Małopolska region's tourism development were Małopolska Region UNESCO Route, Wooden Architecture Route, Małopolska Traditional Craft Route, the expansion of Cultural Air-Park in Cracow or the organization of periodic festivals such as Małopolska Cultural Heritage Days (Piotrowski, Soliński, Pacholska, & Warzybak, 2010, p. 20).

In what regards the support received from the EU, Poland is and used to be the largest beneficiary of EU funds, more than half of the money necessary for the projects undertaken so far coming from the EU. According to the official information portal of the Republic of Poland, run by the Ministry of Foreign Affairs (2017), the largest share of funds went to building express roads and motorways and the second largest recipient was the Polish railways, which most certainly contributed to tourism development in Poland. Tourists of Poland are able to commute more easily, are more willing to pay for transportation services, and the incentive to travel inside Poland's



territory is greater. Plus, historic buildings were restored, and sports facilities, science, technology parks and sewage treatment plants were built, all predominantly with EU funds. A good example of touristic attraction modernized with EU funds is represented by the GrotyNagorzycckie caves, the remaining of a sand mine located near glassworks, which were adapted for tourism. Roughly two-thirds of the total cost of the project was co-financed by the EU.

### ***Czech Republic***

In what regards Czech Republic, considerable income is generated by tourism businesses, sector that makes up 7.8% of country's GDP (Knoema, 2016), with Prague ranking 22<sup>nd</sup> in 2015 in top 100 destinations in the world and being the 4<sup>th</sup> most visited city in the EU (accounts for roughly 62% of the total number of nights spent by international non-residents in the Czech Republic according to Eurostat (2017)), after London, Paris and Rome according to a report published by Euromonitor International (Geerts, 2017). Except for Prague, other popular destinations in the Czech Republic are Severozápad and Severovýchod – 22% of the total number of nights spent by international non-residents in the Czech Republic (Eurostat, 2017), regions that include the Karlovy Vary, Mariánské Lázně and Františkovy Lázně spa towns, the Ore Mountains, the Czech Switzerland national park, the Lusatian Mountains and Jizera Mountains, protected landscape areas. According to the Czech Tourism Office (2017), cultural heritage, health, and spa (both for relaxation and medical tourism), hiking, skiing and clubbing are the main reasons for travel to the Czech Republic, while business tourism accounts for almost  $\frac{1}{4}$  of the total number of international incoming tourists in the Czech Republic.

The main sources of tourists for the Czech Republic are, by market share, according to Eurostat (2017) and the Czech Tourism Office (2017), Germany, United Kingdom, Russia, Italy, USA. By the amount of average daily expenditure, key markets are Russia (roughly 70 EUR per day), the USA, the UK, Italy and Japan (OECD, 2016).

In what regards the Czech Tourism Authority's objectives, they mainly aim to "rebrand" the whole country, as it is apparently still seen as a communist destination but also focus on increasing the repetition of visits and the satisfaction of tourists (Czech Tourism Office, 2017).

In promoting the Czech Republic, a marketing campaign called "Czech Republic: A Country Full of Stories" was put in place, focusing on journeys of discovery the country through unique cultural elements, gastronomy, traditions, and customs. The current National Tourism Policy until 2020 is "Destination Czech Republic – number one in the heart of Europe", with a global objective to increase the competitiveness of the tourism sector at the national and regional levels and maintain its economic performance as a result of achieving a balance between economic, socio-cultural, environmental and regional development (Czech Tourism Office, 2017, p.150).

### ***Croatia***

Croatia is the 28<sup>th</sup> and latest member of the EU, acceding on the 1<sup>st</sup> of July 2013. Here, the service sector accounts for 70% of Croatia's GDP, with tourism playing a significant role in Croatia's development (20% contribution to GDP) (OECD, 2016, p. 326). According to Eurostat (2017), most of the foreign visits in Croatia are from the EU,

Germany ranking first in the period 2007-2015 (13 million tourist arrivals), followed by Italy (8.5 million tourist arrivals) and Slovenia (8.3 million tourist arrivals).

Croatia's tourism is greatly impacted by seasonality, being mainly based on sea and sand type of tourism. Therefore, the latest tourist campaign launched in July 2014 by the Croatian National Tourist Board, suggestively called "Croatia 365", struggles to make Croatia a four-season destination. The Foreign Direct Investments in tourism and auxiliary infrastructure, the great variety of touristic product offerings, the rise in the number of protected tangible and non-tangible attractions throughout the country, and the fact that Croatia has been starred in "Game of Thrones", a famous HBO TV series are several factors that contributed to the impressive growth in the tourism industry in Croatia.

The current tourism strategy was launched in 2013 and seeks EUR 7 billion in new investments in tourism by the year 2020, mainly directed to private and public accommodation establishments, able to attract tourists outside the summer months, but also to increase tourism expenditure, create new jobs, improve quality of tourism services and decrease the turnover rate. Diversifying touristic offerings, organizing cultural, gastronomic and sport events, as well as setting up and promoting thematic parks and cycling routes are among the Croatian tourism industry's priorities. An innovative project developed by the Ministry of Tourism (2016) that acknowledged the high influence e-tourism and Social Media has had recently, was the implementation of a HOT-SPOT programme, able to support free internet access in tourist destinations in Croatia.

Adriatic Croatia attracts roughly 90% of the total number of tourists in Croatia, the most popular cities in the area being Dubrovnik, Split and Zadar, destinations where plenty of UNESCO Heritage Attractions can be found. One of the main touristic spots in Croatia, Plitvice Lakes, reports more than 1 million visitors per year, while the capital city, Zagreb is an important competitor for cities such as Prague or Budapest. Furthermore, cultural tourism is one of the main reasons for travel in Central Croatia, as Zagreb is the city with the most museums per square foot in the world (Zgorelec & Zgorelec, Zagreb, 2016). Croatia is also famous for the presence of naturist resorts (Lonely Planet, 2017), more than 1 million visitors yearly coming to Croatia (approximately 10% of the total according to Eurostat (2017)) being involved with naturism. Last, but not least, Croatia has 116 Blue Flag beaches (certification that a beach meets stringent standards imposed by the Foundation for Environmental Education) and numerous nature reserves.

The main relevant criteria in evaluating the tourism industry in the three New Member States identified as key countries in the region are summarized in Table 1.

**Table 1. Criteria for evaluating the tourism industry in Poland, Czech Republic and Croatia (author's conception)**

Criteria/Country	Poland	Czech Republic	Croatia
Tourism contribution to GDP	5%	7.8%	20%
Comparative advantage	well-developed air travel industry, the diversified and of good quality	unique cultural heritage attractions and protected landscapes	Blue Flag beaches, many nature reserves, and UNESCO Heritage

	accommodation establishments, conferences infrastructure, the country's stable economic and political environment		Attractions
Main tourism forms	Business tourism	Cultural heritage & business tourism	Sea and sand
Main source market (by market share)	Germany	Germany	Germany

## Conclusions

One of the most important aspects to be highlighted and remembered is that tourism in the New Europe is one of the most challenging sectors of the economy, but provides the countries in the area with great benefits, accounting for approximately 12% of their GDP, total contribution. There is huge, still unexploited potential, but the European Union official bodies seem to be increasingly aware of it and have been launched and implemented various policies and programs meant to support, develop and exploit New Member States' comparative advantages in the sector. The main factors that affect the tourism industry in the NMS are the European integration process, the continuously changing tourism preferences, the growing desire to travel and higher budgets designated for this activity, but this topic is yet to be explored and provides a great potential for further research.

Hence, the main conclusions drawn based on the analysis conducted for the period considered, 2007- 2015, reflect the following:

a. Among the NMS, Poland, the Czech Republic and Croatia recorded the highest number of incoming tourist, highest number of international overnight stays and reported the largest number of accommodation establishments and bed places in tourism accommodation establishments in the period 2007-2015. Most of the tourists come from the EU, from neighborhood countries, as a consequence of geographical proximity, reasonable, affordable prices and presumably higher cultural similarity. The best performers in relative terms among the New Member States could also be an interesting topic for further research.

b. The tourism sector in the New Member States is as on a continuously ascending path, and in the period 2007-2015 high levels of growth for all the studied indicators were recorded. It looks like the New Member States are catching up and take great advantage of the opening of new markets and of the existing EU projects, funding, and policies.

c. Poland, Czech Republic, and Croatia differentiate themselves by offering unique experiences. These countries travel and tourism policies tend to focus on niche markets rather than on mass-market tourism. Besides, they benefit of natural heritage landmarks, most of them already UNESCO-listed attractions, to which the tourism bodies worldwide pay high importance.

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