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## METHODOLOGICAL APPROACH AND MODEL ANALYSIS FOR IDENTIFICATION OF TOURIST TRENDS

### METODOLOŠKI PRISTUP I MODEL ANALIZE PREPOZNAVANJA TURISTIČKIH TRENDOVA

**Summary:** *The draw and diversity of the destination's offer is an antecedent of the tourism visits growth. The destination supply differentiation is carried through new, specialised tourism products. The usual approach consists of forming specialised tourism products in accordance with the existing tourism destination image. Another approach, prevalent in practice of developed tourism destinations is based on innovating the destination supply through accordance with the global tourism trends. For this particular purpose, it is advisable to choose a monitoring and analysis method of tourism trends. The goal is to determine actual trends governing target markets, differentiating whims from trends during the tourism preseason. When considering the return on investment, modifying the destination's tourism offer on the basis of a tourism whim is a risky endeavour, indeed. Adapting the destination's supply to tourism whims can result in a shifted image, one that is unable to ensure a long term interest and tourist vacation growth.*

*With regard to tourism trend research and based on the research conducted, an advisable model for evaluating tourism phenomena is proposed, one that determines whether tourism phenomena is a tourism trend or a tourism whim.*

**Key words:** *research, tourism, market, trends, methodology*

**JEL classification:** *L82, L83*

**Rezime:** *Privlačnost i raznovrsnost destinacijske ponude pretpostavka je rastu turističke posjete. Diferencijacija destinacijske ponude se efikasno provodi uvođenjem novih specijaliziranih turističkih proizvoda. Uobičajeni pristup je da se novi specijalizirani turistički proizvodi oblikuju sukladno postojećem turističkom imidžu destinacije. Drugi pristup koji se susreće u praksi razvijenih turističkih destinacija se temelji na inoviranju destinacijske ponude specijaliziranim turističkim proizvodima oblikovanih sukladno globalnim turističkim trendovima. U tu svrhu preporučljivo je odabrati način praćenja i analize turističkih trendova. Cilj je u periodu koji prethodi turističkoj sezoni prepoznati aktualne trendove na ciljanim emitivnim tržištima, te jasno razlikovati hirove od trendova. Prilagođavanje destinacijske turističke ponude turističkim hirovima je rizično sa aspekta povrata ulaganja. Prilagođavanje destinacijske ponude turističkim hirovima može rezultirati i preoblikovanjem imidža koji dugoročno ne može osigurati rast interesa i turističke posjete destinaciji. U kontekstu područja istraživanja trendova u turizmu, u radu se na temelju provedenih istraživanja predstavlja preporučljivi model evaluacije turističkih pojava u kontekstu utvrđivanja da li se radi o turističkom trendu ili o hiru.*

**Ključne riječi:** *istraživanje, turizam, tržište, trendovi, metodologija*

**JEL klasifikacija:** *L82, L83*

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## 1. INTRODUCTION

The competitiveness of a particular tourism destination's offer is significantly dependent on the degree of which it is adapted to global tourism trends (Šerić et al. 2011, 161-176). The match between destination offer and tourism trends determines not only the interest of a particular target market, but also the overall length of destination's tourism season (Kotler and Gartner 2002, 249-261). Based on current knowledge regarding management of developed tourism destinations, previous experiences are seldom used when strategic and tactical decisions are being made. The assortment expansion of destination supply is effectively carried through proactive activities, based on global tourism phenomena analysis. Past standard procedure consisted of forming new, specialised destination products in accordance with the existing destination's image, which is especially unacceptable when one aims to wholly change the structure of the destination's visitors. The current global tourism market has several active members, new countries, whose clientele is characterised by a higher degree of daily spending during the visits, therefore, the destination management is unsure how to exactly adapt the destination's offer to this newly formed segments of visitors. Analysing the actual tourism trends of these new tourism phenomena is an effective solution to such dilemma. Trend analysis can be carried through exploratory research of target markets, or by a fully integrated methodological approach. The former is overwhelmingly present in the tourism research practice (Šerić and Jurišić 2014, 18). By an exploratory monitoring process of potential tourist clientele inhabiting prospective target markets, the researcher ignores the perceptive process which is at the centre of both destination and destination amenities selection (Šerić 2014, 8-12). With such an approach, the risk of misdiagnosing tourism whims as tourism trends steeply rises.

During the recession periods, the new destination products development suffers from almost obligatory, imposed budget constrictions. Supply specialisation for selected target markets is advisable (Hosany et al. 2006, 638). A standardised methodological approach to research and analysis of tourism trends is especially recommendable when destination strategy is used to target chosen markets (Kavaratzis and Ashworth 2005, 506-514). A methodological model will be presented, one formed by authors and utilised during numerous years of practice.

### 1.1. Research subject and problem

Both the research subject and problem are defined by the paper's title. The research subject consists of a modified methodological approach to the research of global tourism trends. The research problem is focused on defining an advisable research model for analysing tourism trends governing key markets. The purpose of the research is to form a model which can differentiate between a tourism whim and a tourism trend, in order to achieve a more efficient expansion of destination's assortment (Šerić 2014, 8-12). The research contribution consists of guidelines for a clear distinguishing between tourism whims and tourism trends. The wrong decision on this matter results in an uncertain return on investment of a newly formed destination product or a tourism destination's amenity. Beside this outcome, modifying the destination offer, according to tourism whims, can also result in unwanted change to a destination's image, one which will not ensure a long term increase in interest and destination visits (Kerr 2006, 4-5). With regard to the research subject and problem, the paper will feature current business experience by the authors, the outcome of numerous case studies. The model formed is a result of the earlier research experiences by the authors (Šerić and Luković 2013a, 51).

### 1.2. Research methods and the basic research question

The research methodology of this paper will consist of a secondary data analysis, obtained from an array of tourism research projects that deal with the research problem.

Induction and deduction methods, specialisation and generalisation methods, along with the case studies will be used.

In accordance with the methodological methods, the fundamental research question is also defined: *The combined qualitative model of testing a tourism phenomenon will ensure the differentiation between a tourism trend and a tourism whim.* The model will be presented in this paper.

## 2. THEORETICAL APPROACH TO TOURISM TREND AND TOURISM WHIM ANALYSIS

### 2.1. Theoretical groundwork

Tourism market research consists of a whole array of standardised methods and procedures that are used for gathering, sorting, analysis and interpretation of gathered data in order to yield relevant information (Šerić and Jurišić 2014, 9). With regard to the continuous attitude and demand change in the global tourism demand, destination management is quite often faced with the dilemma of which particular tourism customer demand to acknowledge (Ashworth and Kavaratzis 2009, 520-531). The acceptance of new demands and wishes of a particular tourism demand also implies the modification of an existing destination offer or a particular supply of an existing tourism entity. The behavioural change of a certain tourism entity can vary in duration. When this change endures quite a few years, one can label it with the term “tourism trend” (Šerić and Jurišić 2014, 20). The tourist wants and wishes which last for a couple of seasons can be labelled with the term “whim”. Tourism business decisions based on tourist whims are quite a risky endeavour. Modifying the existing tourism supply to newly formed tourist’s wishes and desires also implies additional investment and image perception modification. With regard to the duration of tourism whims, a favourable return on investment does not represent a possibility. On the other hand, modifying the tourism supply to suit tourism trends is economically justified, for it contributes to the market share preservation, or even the growth increase in tourist visits to a particular destination (Papadopoulos and Heslop 2002, 294-314).

In accordance with the targeted tourist segment, relevant for a particular tourism subject, a global trend can have varying influence on the tourism consumption (Šerić et al. 2014, 31-35). Business practice has corroborated that tourists react differently to the modification of a destination offer, one based on actual, existing trends (Šerić 2012, 428-436). Yet, tourist reactions are completely absent on certain destination offer modifications (Šerić and Vitner-Marković 2011, 97). Considering that each destination offer change and offer innovation also represent additional expense, a preliminary analysis of supply enhancement alternatives is advisable. It is practical to implement a standardised model when conducting a preliminary analysis of tourism phenomena, which can then be used to determine means of enhancing the destination offer. By standardising the measuring instrument used for determining the characteristics of numerous tourism whims and trends, the researcher ensures the relevance of comparison (Hosany et al. 2006, 639). In the existing scientific literature, the models used for standardising the measuring instrument used for the evaluation of tourism whims and trends have, thus far, not been presented.

The monitoring of each new tourism phenomenon on the global market, along with the informal trend and whim research, presents a desirable starting point of supplementing existing databases of tourism subject’s secondary data. Updated databases of target markets are a prerequisite of testing new tourism demand behaviours and thus, the differentiation between trends and whims. Secondary data obtained by a non-formal research, through every day contact with tourists, agency and tour-operator representatives lack objectivity and therefore result in an inability to generalise for the wider tourism population. Non-objectivity is also a possible difficulty, for the conclusions are deduced from individual attitudes. However, based on this particular approach and the frequent research, it is still possible to create guidelines for the testing of tourism phenomena and behaviour, in order to ultimately determine whether a trend or whim is present.

### 2.2. Current scientific knowledge

The recession conditions actually contribute to the development and growth of tourism demand, because money has a higher perceived value during the exchange process (Hosany et al. 2006, 638-642). Because of this, tourists expect an innovated tourism offer. By predicting complex tourism needs, one is able to also anticipate tourism trends. As some authors, such as Krippendorf, view that the societal change comes through the shift in the system of values, in a similar fashion, the anticipation of new tourism trends should be based on achieving a greater tourism service value in the eye of the beholder, i.e. the prospective visitor (Qu et al. 2011, 465-476). Nowadays, the concept of a *spare time culture lifestyle* is a current one, which means that the tourist will seek additional satisfaction during periods of time spent reaching and staying at a certain tourism destination. The

actual research results point to a completely new pattern of tourism service's value (Šerić and Jurišić 2014, 22). It is characterised by the following attributes (Šerić and Jurišić 2014, 22):

- A more active tourist participation during the process of providing a tourism service;
- Spontaneity of the tourism service;
- A wider social contact during the process of providing a tourism service;
- A relaxed manner of tourism service providing;
- A more entertaining content during the process of providing a tourism service.

The above-mentioned characteristics determine the majority of contemporary tourism trends. They are based on a freedom to choose between offered activities that also enable the tourist to be an active participant (Qu et al. 2011, 465-476). On such a basis, the focus on premium pricing of an innovated tourism service loses its substance, for it no longer guarantees the enhanced tourist loyalty. The formation of tourism supply should therefore be primarily based on the expectancies and wishes of a target segment, not on the act of perfecting the process of providing a tourism service (Qu et al. 2011, 465-476). With regard to this, the tourism destination's content should be primarily based on preliminary tourist expectations. Tourism visits nowadays are significantly dependent on integrating the global tourism trends into the destination's supply. The growth of tourist's interest is evident, but conditioned on significant structural changes. Since Europe is responsible for approximately 45% of the total World tourism, it is a relevant factor when analysing tourism trends. Global tourism trends are nowadays created on globalisation, socio-demographic shift, ecology and new technology considerations. Sustainable development, seen through the prism of new tourism trends is no longer measured through parameters of tourism growth, tourism income or the number of tourists, but through the tourism resource management, particularly landscape and the perseverance of authentic destination's values (Ashworth and Kavaratzis 2009, 520-531). The degree to which the change in living patterns and globalization are accepted as tourism destination's standards ultimately influences both the preservation and the possible growth in tourism share. The issue of modifying the fundamentals as direct constraints of a sustainable and responsible tourism development can be paraphrased by an idea proposed by Keynes, which held that the *key to progress is not in the acceptance of new ideas, but in the abandonment of old ones* (Marušić and Prebežac 2004). Based on such considerations, it is possible to differentiate between trends and whims. The trend repercussions on the tourism destination development are noticeable in different areas, among which three are fundamental (Qu et al. 2011, 465-476):

1. The area of standard tourism needs – mass tourism, acceptable arrangements, tourist stay concentration, regards for mass tourism while creating tourism services, separation of tourism stay from the cultural estates that are visited, the desire for active participation for the purpose of emulation, etc.
2. The tourism supply adapted to the principles of industrial production (serial and mass *production* of tourism services; a high degree of standardization; tourism supply concentration).
3. The area of mass, at times uncontrolled commercialisation of tourism resources.

In the recent years, new tourism products are characterized by the formation of completely new relationships. Technological development contributes to the changing market structure, with the evident processes of target audience concentration and integration. The strengthening of competition caused the increase of both vertical and horizontal integrations in the tourism sector. All of these processes represent valuable experiences, ones that can be analysed to understand future behavioural trends of the tourism demand.

Among the most recent tourism trends is cultural tourism, which should be implemented into the existing tourism supply with particular regard to history, art and heritage and autochthon customs. The trend of cultural tourism is evidently more popular with the more educated and prosperous, middle-aged and elderly. Recent research points to the fact that music events show an increase in interest (20%), for the segment preferring cultural tourism, followed by tourism resources of particular historic and cultural destination significance (18%). The interest in theatre shows is also on the rise (13%). Noticed is a decrease of interest in museums and galleries (with the exception of innovative exhibitions – the *living museum* and the like). The interest in entertaining attractions, theme parks and similar venues is also on the rise. The trend also encompasses *far away destinations* and alternative

tourism offers. Tourism products that are quite dissimilar from the usual, mass tourism destination supply are wanted (Šerić and Jurišić 2014, 22).

The destination offer should be adapted to the narrower segments, characterised by a higher disposable income and based on intimate, authentic experiences, made for smaller groups of tourists. While offering alternative tourism products, high standards of environmental protection should be adhered to, with particular regard to the formation of a suitable utilisation of tourism resources, one that will ensure the protection of the ecological component. The offer should be conceptualised in a way that enables the maximum length of tourist stay in an ecological ambience.

The research and analysis of tourism trends enables the anticipation of trends that are yet to come. To paraphrase Kotler, *in order to become a toreador, one must first learn how to be a bull* (Marušić and Prebežac 2004, 64). In other words, for the tourism entity to ensure good results through offer and image, it should analyse the supply from the aspect of the target audience. The ever changing trends should be monitored and, with regard to current information, the tourism supply should be modified.

The current trends mark an increase in demand for the *lifestyle* destinations. The wealthier clientele avoids travelling to destinations in the vicinity of nations with volatile political conditions. Tours inspired by radio, TV adverts and, particularly, specialised tourism programmes - are on the rise. Trending are also destinations that are used in production of movies and TV series broadcast to the target audiences. The trend on the increase is also the Internet use for the entire process of destination choosing, reservation of the stay and miscellaneous amenities, transfer and pay of all the expenses. A significant influence on trends of Croatia's destination choosing is also the exchange rate parity.

### 3. BUSINESS CASE RESEARCH RESULTS

#### 3.1. The research subject: *Gradac Riviera, Republic of Croatia*

In 2011, a project of tourism branding of the *Gradac Riviera* commenced (Šerić and Luković 2011, 4). Initiated by the representatives of local government, the local tourism board, along with the support of the members of the *Tourism council*, numerous, continuous research attempts are carried in order to support the project (a portion is set forth in the literature section of this paper). A segment of the carried research is closely related to the issue of current tourism trends (Šerić and Luković 2013b, 47). With regard to the set research question: *A combined qualitative model of tourism phenomena testing enables a clear differentiation between a tourism trend and a tourism whim*, the following chapters will deal with experiences and knowledge gained from such projects.

#### 3.2. The summary of trend research on the sample of visitors of *Gradac Riviera*

The research has pointed to myriad new trends regarding health, cultural, dark and sex tourism in the market of the European Union (Šerić and Jurišić 2014, 18). Numerous specific, national trends of the EU members significantly depend on the characteristics of a *typical* tourist visiting the Adriatic. The prevalent age segment for a tourist that visits the Republic of Croatia's coast is between 28 and 47 years of age. In that particular segment, almost 60% of the populace is approximately 41 years of age (Šerić and Luković 2011, 34). The greatest number of tourists in that segment has a secondary education (approximately 40%). The parallel analysis carried out points to the fact that the education level of an average tourist is on the rise. By standardising the realised trends governing the behaviour of this segment, it is feasible to create completely new entertaining and recreational destination amenities (Šerić and Luković 2012, 23). The research results also point out to the increase in interest for *adrenaline daily excursions*, for all of the extreme sports (rafting, canoeing, bungee jumping, zip lining, mountain biking, skydiving, etc.). The destination selection process is also based on the existence of both walking and biking paths, in the areas of an attractive landscape. The interest in visiting destinations with autochthonous amenities and a preserved cultural and historical heritage is also on the rise. Accommodation locations chosen are usually smaller in scale, with a bold family feel to it, but combined with a high degree of comfort and service, with a varied offer of organic food

produced in accordance with the highest ecological standards, the Croatia's national cuisine dishes, etc.

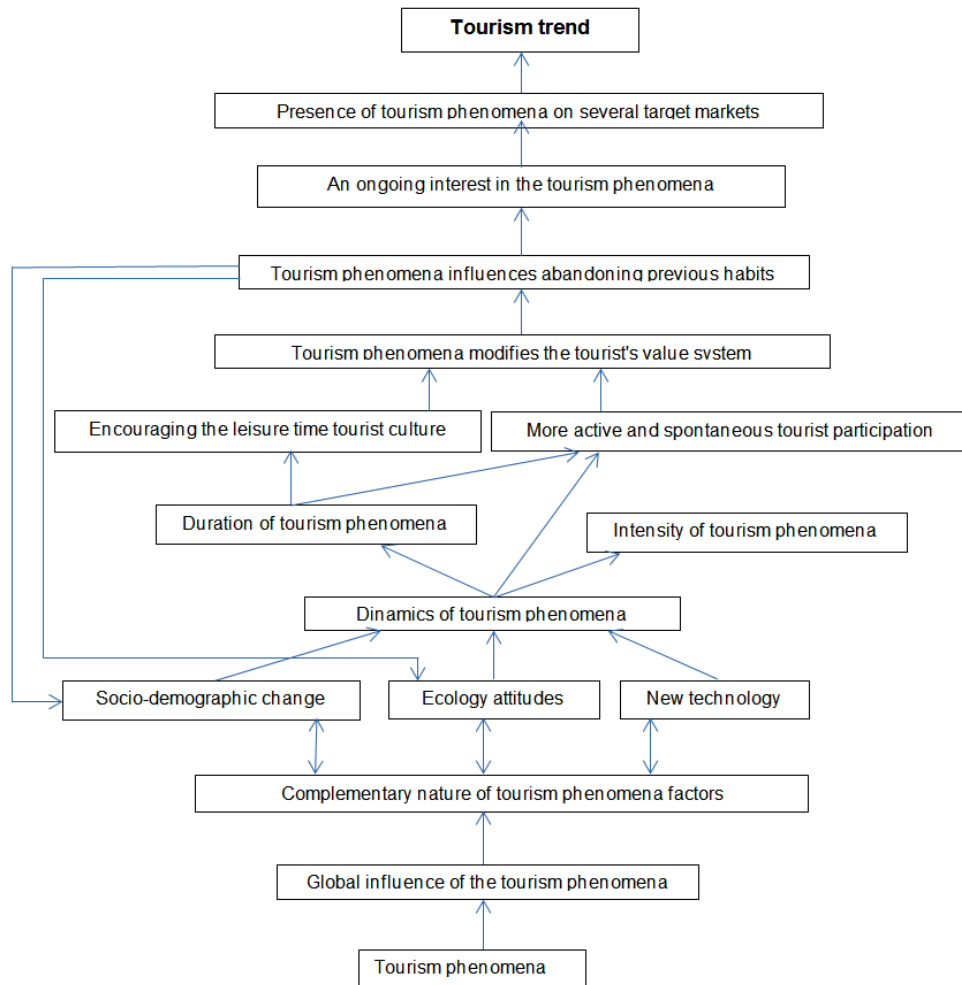
The overall structure of *Gradac Riviera's* visitors tends to gravitate toward family travels, with a decrease in a total number of visitors. Preseason and postseason visits are also more frequent by the elderly segment, not because of lower prices, but because of a calmer and serene destination atmosphere (Šerić and Luković 2013a, 10). The arrival by personal cars is also trending, in opposition to the previous trend of arriving by a bus. An average stay for persons travelling as a couple is from 8 to 14 days, with an increase in short stays by people travelling numerous times a year. The research also pointed out that the number and size of beaches, cultural sights and nightlife amenities are no longer sufficient in maintaining the existing market share of a destination. The need for added specialisation of the destination offer is evident. A quarter of *Gradac Riviera's* visitors bases their decisions on brochures, advertisements, tourism reports featured in the newspapers and magazines issued in their respective countries. The published stories account for 11% of total incentives for choosing *Gradac Riviera* as a vacation spot. Research has pointed out that visitors respond positively to tourism arrangements that feature workshops and education on the local cuisine and the producing of healthy food (Šerić and Luković 2013a, 49).

When compared to trends, the research concluded that tourism whims are of a shorter duration, with initial interest quickly declining. The tourism market whims form quickly, transform and perish (Qu et al. 2011, 465-476). Numerous tourism whims are formed as a consequence of specific behaviour and random, one time visits by celebrities (sportsmen, politicians, movie stars and others) to particular destinations. Directed activities, with the goal of creating loyalty of a certain destination target audience encourage a repeat visit. The continuous visits by famous people transform the whim into a trend. Based on the existence of a possible transformation of whims into trends, coupled with the realistic option of wrongly identifying a whim as a trend, it is advisable to utilise a standardised methodological approach when conducting these tourism research attempts and analysis. Identifying trends based on monitoring the target markets is a risky approach for small countries, because of the humble budget intended for reorganising and expanding the destination offer (Hall 2002, 323-334).

### 3.3. Model proposition

The research dealing with the analysis of tourism phenomena, in order to determine whether it is a trend or a whim, uses a qualitative model, discussed in the following chapter. The starting point is a new tourism phenomenon, analysed with regard to its global repercussions on tourism development and the tourism supply interests. In case the tourism phenomenon in question is isolated phenomena on a particular, constrained market, it is quite possible that a whim is in question. On the other hand, in case an analysis of tourism phenomena components indicates at a complementary nature, a tourism trend is a viable possibility. Defining the variables influencing socio-demographic change, attitudes toward ecology and the importance of new technologies for the further development of the tourism phenomena are all indicators of a tourism trend. A sole dynamic quality of the analysed tourism phenomena does not necessarily confirm that it is a trend, however, in case previously mentioned characteristics are present, and this is an additional confirmation that, indeed, the analysed tourism phenomena is a trend. Additionally, in case the phenomenon is continuous and accepted by numerous tourism segments, it serves as an additional confirmation that a tourism trend is present. More arguments can be found in case the tourism phenomenon in question also facilitates the change in leisure time culture, increasing the instances of tourist participation. Furthermore, another argument that a phenomenon is indeed a trend is if the phenomena have a significant influence on the tourist's system of values. A tourism phenomenon that contributes to the change in past tourist habits definitely indicates that a tourism trend is in question, not a whim. An ongoing tourism interest for a certain destination is an additional confirmation that a tourism trend is present, often associated with a simultaneous existence on several various target segments.

Picture 1: Model diagram



Source: author's research over numerous years 2014

#### 4. CONCLUSION

Global tourism market is nowadays a competitive market for 200 viable target countries. Such competitive pressure makes the monitoring of actual tourism trends and a subsequent modification of destination offer for the chosen target segment an absolute necessity. By considering tourism trends, one is able to identify special tourist desires, brand new market opportunities, profitable investment areas and the viability of necessary investment into the tourism destination infrastructure. The tourism trends were once represented by a narrow segment of wealthy clientele. Nowadays, tourism trends are important for various segments and followed by a majority of tourists. Modern tourism trends are currently driving entire global tourism development, with their inclusion into destination offer ensuring a timely return on investment into tourism infrastructure and network supra structure.

Each tourism trend is based on a particular resource, so the act of modifying destination offer to suit current tourism trends significantly depends on existing, specific characteristics of the destination's resources. With regard to that, it is useful and desirable for the destination management to analyse and monitor current tourism phenomena existing on the target markets. The change in trend formation and customisation is evident when comparing the earlier decades and the actual market environment. Globalisation processes favour the tourism trend development. Destination offer based on global tourism trends ensures a continuous growth in tourism visits.

Predicting tourism trends is a complex area, dependent on a scientific approach and analysis. Although the actual tourism market is primarily characterised by uncertainty, the randomness of tourism demand is actually a theoretical concept, for each form of tourism behaviour is causal in nature. The means of predicting future tourism trends vary, however, and a methodological approach

to analysing existing trends is a constant imperative when strategically managing the destination tourism development.

The behavioural trends of tourist clientele point to the factors relevant in the process of travel decision making (choosing the time of the year when travel will take place, determining the location of the stay, etc.). Examining the casual behavioural factors makes rational destination offer management possible, along with the increase in destination offer with particular, specialised tourism products. After new trends are identified on the global tourism market, destinations compete to more quickly adapt their offer. In such an environment, small tourism destinations, located in transitional economies are unable to equally participate. Exactly because of such a difficult position, the authors have formed, based on their own and others' research, a combined, qualitative model of testing a tourism phenomenon, in order to determine whether it is a tourism trend or a tourism whim.

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