CROATIA
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%.

1 in 4 net new jobs were created by Travel & Tourism over the last five years.

10.3% Total GDP contribution

330 Mn Jobs globally (1 in 10 jobs)

25.0% of total economy

+4.1%

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>5%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>35%</td>
</tr>
<tr>
<td>Retail</td>
<td>5%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>45%</td>
</tr>
</tbody>
</table>

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

CROATIA 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

25.0% OF TOTAL ECONOMY
Total T&T GDP = HRK99,854.3MN (USD15,025.8MN)

+4.1%
2019 Travel & Tourism GDP growth vs +2.9% real economy GDP growth

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

383.4 JOBS (000's)
(25.1% of total employment)

INTERNATIONAL VISITOR IMPACT

HRK80,247.5 Mn in visitor spend (38.6% of total exports)
(USD12,075.4MN)

INBOUND ARRIVALS

1. Germany 17%
2. Slovenia 9%
3. Austria 9%
4. Italy 7%
5. Poland 6%
Rest of World 52%

OUTBOUND DEPARTURES

1. France 27%
2. Italy 11%
3. Slovenia 9%
4. Austria 6%
5. Germany 5%
Rest of World 42%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)

- Leisure Spending 95%
- Business Spending 5%
- Domestic Spending 11%
- International Spending 89%

1All values are in constant 2019 prices & exchange rates
As reported in March 2020