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ANALYSIS OF THE DEVELOPMENT OF THE NAUTICAL TOURISM OFFER IN THE REPUBLIC OF CROATIA

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Abstract

To be able to develop a competitive nautical tourist offer, destinations need to have attractive factors and a quality infrastructure like ports, marinas, and additional facilities that nautical tourists expect. From the economic point of view, this form of tourism is significant because it attracts tourists with higher purchasing power, who are ready to pay for the high quality of the service provided. Republic of Croatia is a European destination that successfully develops nautical tourism as one of the most important forms of tourism for the entire economy. This is conditioned by the existence of a quality resource base and support in the form of attractive and receptive factors. The paper analyzes the current state of the offer of nautical tourism in Croatia based on quantitative and qualitative indicators. Based on the results, guidelines for the further development were developed in order to take a better position on the tourist market.

Keywords: nautical tourism, competitiveness, Republic of Croatia

INTRODUCTION

Contemporary tourists are showing a growing interest in participating in tourism flows and escaping from the reality. Their interest is not strictly focused on passive holiday and leisure, but on active spending of free time. This change resulted in strong and successful development of nautical tourism because it enables an ideal combination of sports and recreation activities and tourism in one. Nautical tourism has been registering successful development and growth on world level, and in particular in the European part of the Mediterranean, due to the fact that its particular offer has been enabling for tourists the establishment of particular relations with nature, sea and its beauties outside of the permanent place of residence (Gračan & Alkier Radnić, 2005). Nautical tourism represents an important element of the diversification of the tourist offer as well as economic

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development not only at the local but also at the regional and state level (Ivanić et al., 2018). The Republic of Croatia (further in paper Croatia) is a tourist destination which has profiled itself as one of the most developed nautical tourism destinations in Europe since the 1980s onwards (Jugović et al., 2013), which is why it is well positioned on the (nautical) tourism market today. To be able to maintain such high position, it is very important to analyze the state of the nautical tourist offer and make the necessary improvements. The purpose of this paper is to analyze the state of Croatian nautical tourist offer in the post-pandemic period, and based on the findings discuss the ways of potential improvement.

THEORETICAL BACKGROUND

Nautical tourism represents one of the most developed specific forms of tourism in the world. This type of tourist offer includes travels that are related with the stay of tourists at sea (Esteve-Perez, 2015). This type of travel allows tourists to visit many destinations (Erdeji & Dragin, 2017), which provides them with a diverse tourist experience. In addition to staying on vessels, this form of tourism is also connected to different segments of the tourist offer such as attractions, accommodation, etc. (Miskolczi et al., 2020). Although nautical tourism is recognized as a significant factor in the development of coastal destinations (Rindone, 2019; Martínez Vázquez et al., 2021), in the literature there is still uneven attitude of authors when defining this term. Nautical tourism can take on different forms, with cruises, water sports, boat rentals for water activities, etc. being most often analyzed in the literature. (González et al., 2015). According to Luković (2012), nautical tourism represents a set of multifunctional activities and relations, which is a consequence of the stay of boating tourists in or around the port, while the use of vessels and other facilities is related to recreation, entertainment, sports, etc. Accordingly, this form of tourism includes various services such as the services of nautical companies, cruise companies, charters, ports, underwater tourism industry, shore service, etc. (Troian et al., 2023). The emphasis is on recreational activities, which tourists engage in outside the place of permanent residence and focused sun and marine environment (salt water under the influence of the tide) (Orams, 1999; Darmawan et al., 2022). Nautical tourism is a relatively complex concept, bearing in mind that recreation on sea implies various activities, which provide tourists with a quality and meaningful experience. The variety of coastal and marine recreation is much more than a beach holiday because the free time that tourists have can be used for diving, underwater photography, recreational fishing, cruising (Moreno & Amelung, 2009); sailing, jet skiing, kayaking, visits to fishing grounds, sailing, maritime events, boat races, etc. A similar interpretation of this term is advocated by Gračan et al., (2016), stating that nautical tourism is based on traveling on water, river or sea, as well as that the infrastructure used is developed so that it is intended for holiday tourists, whose primary motive of stay on water are holidays and recreational activities. Nautical tourism represents a more exclusive form of

tourism, considering that tourists spend time on cruise ships and yachts, and at the same time they form a demand segment, which is highly paid and demanding in terms of quality of services. Nautical tourists represent a segment of the demand for this form of tourism because they are highly sophisticated tourists who are ready to pay to get a meaningful experience. According to Alkier (2019), today tourists are much more active in using water surfaces, especially the sea, compared to the previous period when they originally bathed and enjoyed the sun. Tourists are increasingly interested in sports and recreational activities on the open sea. Also, the authors point out that this form of tourism is very complex, considering the use of very expensive equipment and infrastructure, but also the observance of certain legal regulations, whereby nautical tourism is associated with a certain amount of risk (Favro et al., 2008; Kasum et al., 2018). The development of this form of tourism depends on the existence of large water areas, primarily the sea, but also the necessary infrastructure, which is certainly a key factor in the development of nautical tourism. So that nautical tourism as a specific form of tourist activity together with infrastructure and superstructure has a significant impact on the transformation of the space in which it develops (Butowski, 2014; Kovačić et al., 2015; Alihodžić Jašarović et al., 2023). From the economic aspect, nautical tourism affects the development of the entire economy through the engagement of resources from various activities, the quality of life of the local population, as well as the development of services that are intended for tourists but are also available to the local community. The effects of consumption are realized in a direct and indirect way, but primarily significant effects are achieved on shipbuilding, ports, marinas due to the necessity of returning invested capital as well as profits. On the other hand, significant economic effects were realized through various activities, whose services tourists use, such as shops, catering facilities, accommodation, etc. (Ivanić et al., 2018). Nautical ports represent a significant generator of jobs and income, which is why they are very important for the overall social and economic development of coastal communities (Marušić, 2021; Gallo, 2023). In addition to significant economic effects, this form of tourism requires significant use of natural resources while creating a negative impact on the environment. In this sense, nautical tourism is one of the few forms of tourism, the long-term development of which requires monitoring and controlling the degree of endangerment of natural resources.

CHARACTERISTICS AND THE STATE OF THE NAUTICAL TOURIST OFFER IN THE REPUBLIC OF CROATIA

Croatia is a destination which possesses numerous natural, historical, and other resources, as well as the necessary infrastructure for the development of a competitive nautical tourist offer (Alkier et al., 2015). When discussing natural resources, it is necessary to mention flora and fauna, characteristics of the sea, appropriate climate, and relief. Croatia has one of the clearest and cleanest seas

in the world, with appropriate currents (relatively calm sea). Winds are very frequent and have a strong influence on tourist's experiences. Croatia has one of the most indented coasts in the world, whose length amounts 6,278 km with 1,244 larger and smaller islands, rocks and reefs. (Croatian National Tourist Board, 2023; Gračan, Alkier Radnić and Uran, 2011 according to Blažević, 1988, p. 5, Naval Encyclopedia, 1976). Croatia is successfully developing nautical tourism, which is testified with the fact that most of the marinas offer high quality facilities for nautical tourists, like reception desks, currency exchange, accommodation facilities, catering facilities, ATM, beauty salons, casinos, facilities for children, swimming pools, organizing same-day trips, dry cleaning, wellness services, playing golf, gym, renting bicycle, laundry services, library, medical services, rent-a-car, transfers, motorbike rental, parking facilities, boat cleaning, maintenance and other services in marinas, boat rentals, diver services, meteorological station, navy-guard service, sailing school, sanitary facilities, satellite antenna connection, scuba diving school and scuba renting equipment, technical protection of piers (video surveillance), Tesla charging stations, various shops, water and electricity connections, etc. (see more in Marine, n.d.; Charter Croatia.net, n.d., etc.). To present the current state of the offer of Nautical tourist offer in the Republic of Croatia, besides the previously presented structure of services of nautical tourism, the authors will analyze the latest quantitative and qualitative indicators. Quantitative data was gathered from the Central Bureau for Statistics of the Republic of Croatia. In terms of qualitative indicators, selected results of the TOMAS Nautica Survey Attitudes and consumption of yachtsmen in Croatia in year 2022 were used, published by the Institute of Tourism in Zagreb. According to the Central Bureau for Statistics of the Republic of Croatia (2022a, 2022b, 2022c, 2022d), in 2022, a total of 16.176 vessels on permanent berth in the ports of nautical tourism was registered, of which 12.632 vessels used sea mooring, and 3.544 used only land berths. When observing the realized income of the ports of nautical tourism, in 2022, a total of 143.581 euro (VAT excluded) was registered, of which 100.562 euro was earned from renting berths (77.762 euro from permanent berths and 22.801 euro from transit berths), 29.941 euro from other incomes, and 13.077 euro from repair services.

From the economic aspect, nautical tourism is a significant revenue generator for the entire economy of the Republic of Croatia, as a result of which it is necessary to continuously monitor and analyze the achieved results in order to improve the achieved position on the tourist market. Also, the analysis of the attitudes of boaters in the Republic of Croatia about the quality of the offer can greatly help in defining and implementing a strategic approach to the development of this form of tourism. TOMAS Nautics-Attitudes and consumption of yachtsmen in Croatia in year 2022 has been conducted on a sample of 2,508 sailors, in 32 marinas and 7 ports open to public traffic along the coast and on the islands of Croatia. Research was conducted from June until October 2022, and CAPI method (Computer-aided personal interview) was

applied. Following the authors will present the selected results. Following table presents the sociodemographic characteristics of the respondents.

Table 1: Sociodemographic characteristics

Age	%
up to 25	2,1
26-35	20,5
36-45	33,5
46-55	28,7
56+	15,3
Level of education	%
High school or lower	7,9
College	44,3
Faculty or more	47,8
Country of origin	%
Germany	15,5
Austria	13,1
Croatia	8,7
Italy	7,5
Slovenia	7,4
Poland	5,7
Czech Republic	5,6
Hungary	4,6
Switzerland	4,6
France	4,3
Netherlands	4,2
Slovakia	4,1
Great Britain	4,0
Nordic countries	2,7
USA	2,2
Rest	5,9
Monthly income in EURO	%
Up to 1.000,00	0
1.001,00-1.500,00	0,1
1.501,00-2.000,00	0,5
2.001,00-2.500,00	2,5
2.501,00-3.000,00	6,1
3.001,00-3.500,00	13,0

3.501,00-5.000,00	20,9
5.001,00-7.500,00	23,8
7.501,00-10.000,00	18,3
10.001,00 and more	14,7

Source: Marušić et al. (2023, p. 21-28)

Previous table presents the sociodemographic characteristics of the respondents. According to the age, most of the yachtsmen belong to the age group 36-45 (33,5%), followed by those in the age group 46-55 (28,7%) and 26-35 (20,5%). They come from Germany (15,5%), Austria (13,1%), Croatia (8,7%), Italy (7,5%) and Slovenia (7,4%) and are very educated (47,8% with a faculty diploma or more, and 44,3% with a college diploma). They also have a high purchasing power since 23,8% of them have a monthly income ranging from 5.001,00-7.500,00 EURO (23,8%), followed by those with 3.501,00-5.000,00 (20,9%).

Table 2: Activities during their stay in a nautical destination

Activities	%
Going to restaurants	99,8
Going shopping	91,6
Going to pastry shops, cafes, etc.	68,9
Nature walks/hiking	49,2
Visiting local parties	45,0
Sightseeing, visiting museums and exhibitions	39,1
Diving	37,0
Fishing	36,9
Dance/disco	32,7
Tour of wine roads/olive oil roads	29,9
Excursions to national parks/protected natural areas	28,0
Other sports and recreational activities at sea (except swimming and bathing)	24,1
Visit to theme (water, amusement, etc.) parks	18,5
Sports and recreational activities on land (tennis, hiking, cycling)	18,3
Visiting concerts, theater and performances	13,4
Visits to family farms	12,2
Something else	3,6
The entire experience on this cruise in Croatia	%
In line with expectations	61,6
Above expectations	37,9
Below expectations	0,5

Source: Marušić et al. (2023, p. 37)

From the previous table it is visible that during their stay in Croatia, yachtsmen prefer to visit restaurants (99,8%) and explore gastronomic offer, go shopping

(91,6%), visit pastry shops, cafes, etc. (68,9%), enjoy their walks in nature or go hiking (49,2%), visit local parties (45,0%), go sightseeing and visiting museums and exhibitions (39,1%), diving (37,0%), fishing (36,9%), go dancing in discos (32,7%), go on tours of wine roads and olive oil roads (29,9%), and on excursions to national parks/protected natural areas (28,0%).

Table 3: Level of satisfaction

Degree of satisfaction with the elements of the offer	%
The beauty of nature and landscape	95,0
Personal security in Croatia	94,9
Atmosphere, atmosphere	94,2
Gastronomic offer in the town	93,8
Environmental protection in Croatia	92,9
Reception at the airport (transfer)**	92,8
Overall satisfaction with sailing in Croatia	92,8
Condition of the ship (correctness, arrangement, equipment, etc.)**	92,5
Spatial arrangement of marinas	92,4
Orderliness and cleanliness of the place	91,8
Traffic accessibility of the port of departure	91,5
Acceptance at the departure marina**	91,4
Information/instructions/recommendations on navigation**	91,2
'Value for money' total offer for boaters	89,5
Tidying and cleanliness of the marina	88,9
Sufficient connections for water and electricity in the marina	87,2
Connections (width, correctness)	86,8
Entertainment facilities	86,6
Water supply (cold and hot) in the marina	86,5
The helpfulness of the marina staff	86,4
Availability of information in the marina about the tourist offer of the place	86,1
Sanitary facilities in the marina	85,3
Cultural manifestations	84,5
Hospitality services in the marina	84,1
Possibility of shopping in the place	83,2
Sports facilities	82,9
Quality of technical service (repair speed)	80,8
Possibilities of shopping in the marina	70,0

Source: Marušić et al. (2023, p. 39)

The results in the previous table indicate that yachtsmen show a significantly high level of satisfaction with the elements of the nautical tourist offer. The highest level of satisfaction was expressed for all the elements of the offer except. Only one element, Possibilities of shopping in the marina (70%), was marked with a high level of satisfaction.

Table 4: Average daily expenditures of boaters on sailing according to vessel ownership (per person, per diem, in EUR)

Average daily expenses	€
Total	181,96
Expenses for the vessel	111,12
Expenses for boat rental	52,63
Expenses for the skipper (if not included in the rent)	9,88
Vessel mooring expenses (not including permanent mooring expenses)	15,99
Fuel expenses	30,34
Expenses for service services and other expenses	2,28
Expenditure for the initial supply of the vessel	10,83
Other expenses during navigation	60,01
Expenses for hospitality services	34,07
Expenses for purchases	14,12
Expenditures for culture and entertainment	2,97
Expenditures for sports and recreation	2,71
Expenses for organized trips	0,97
Local transport expenses	2,72
Expenses for accommodation on land during the voyage	0,60
Rest	1,85

Source: Marušić et al. (2023, p. 41)

It is visible from the previous table that average daily consumption of yachtsmen amounts 181,96 euro per day per person. Most of the funds are related to expenses related to the vessel (boat rental, expenses for skipper (if not included in the price), mooring expenses, fuel, etc.) (111,12 Euro). while 60,01 Euro includes other expenses like hospitality services, purchases, entertainment, etc. They spend the least on initial supply of the vessel (10,83 Euro).

CONCLUSION

The focus of this paper was determining the level of development of nautical tourism in the Republic of Croatia, which belongs to the developed part of the Mediterranean and represents a highly developed destination of this form of tourism with a built image on the tourist market. Both quantitative and qualitative indicators are clearly indicating the importance of and successful development of this specific form of tourism. It is visible that nautical tourists are loyal (most of them visited Croatia 3-7 times due to its nautical tourist offer), and very satisfied visitors who spend significant amounts of money per day. It is evident that high-paying tourists cruise the sea areas of the Republic of Croatia with the desire to use different segments of the offer in addition to staying on the coast in their vessels. This trend should be maintained with the improvement of all segments of the offer, but also with more intensive marketing activities on social networks and tourist fairs. In addition, monitoring of the sustainability of the development

of nautical tourism should be considered and implemented with the aim of providing a quality experience to tourists, but also to preserve nature, which will be one of the main challenges in the future.

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