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Abstract

This paper will present a comparison of ACI marina Opatija and ACI marina Split. The characteristics of both marinas as well as their services will be researched. Indicators will show the number of berths, vessel calls, average capacity utilisation, revenues and expenditures. SWOT analysis of both marinas will be drafted; defining the strengths, weaknesses, opportunities and threats. Suggestion for improvements will be provided, which may be applicable to other Croatian marinas and marinas of countries that share similar characteristics.

Keywords: *nautical tourism, ACI marina Split, ACI marina Opatija, SWOT analysis*

JEL: Z32

1. INTRODUCTION

Nautical tourism is the sum of multifunctional activities and relations caused by the stays of touristsailors, inside and outside the ports, and by the use of boats and other objects related to nauticalrecreation, entertainment, sport or other needs (Moreno and Otamendi, 2017). Furthermore, nautical tourism holds a very important place in the development of the economic activities of the countries (Dundović, Kovačić and Tomić, 2015).

One of the biggest disadvantages of nautical tourism in Croatia is the insufficient number of berths(Jajac, Kilič and Rogulj, 2018). Italy, Spain, France and Greece are Croatia's main competitors:the first three have more berths and better infrastructure and superstructure than Croatia; Greece can compete with Croatia where natural resources and cultural and other assets are concerned, but not when it comes to the number of berths(Kovačić, Favro and Saftic, 2012).

Several prerequisites which nautical tourists take into consideration while choosing a marinashould be met, such as safe berthing of vessels that will be protected from wind and waves, or additional facilities that a marina offers. Currently, there are 56 marinas in Croatia, all members of the Association of Croatian marinas, with 16.000 berths, 8.500 dry berths and 30.000 berths in ports and sport ports (Tomas Nautika-Institut za turizam, 2018). The tourists from Germany, Austria, Italy, Slovenia, the Czech Republic and Slovakia, and recently from Russia and the Netherlandsare the most frequent tourists in Croatia(Croatian Bureau of Statistics, 2018).

ACI marina is the leading company in Croatia with 5.649 berths: 5.013 berths at sea and 636 dry berths(*Adriatic Croatia International Club d.d. –ACI Marina - Vez za Brod - Adriatic Croatia International Club d.d.*, 2019).ACI marina operates the largest number of marinas in Croatia and plans further growth by introducing additional marinas. ACI marinas are affected by concession contracts, which will expire in 2030 (except marina Veljko Barbieri and both anchorages). The duration of concession is the most limiting factor for the development potential of the company (*Adriatic Croatia International Club d.d. –ACI Marina - Vez za Brod - Adriatic Croatia International Club d.d.*, 2019).

In this research, a comparison of the aforementioned two marinasand SWOT analysis will be made, with an emphasis on 2016 and 2017. Following the analysis, improvements will be suggested, which should be applicable to other Croatian marinas and marinas of countries that share similar characteristics.

2. ACI MARINASSPLIT AND OPATIJA

Split is the largest city in Dalmatia, the second largest city in Croatia. ACI marina Split, located in the Middle Adriatic, operates all year round and is recognized as an attractive location with various sights and beaches that are situated in the vicinity of the marina. Its long breakwater provides excellent protection to the southern winds (*Adriatic Croatia International Club d.d. –ACI marina Split, 2019*). ACI marina Split is actually the starting point of Split's waterfront, the longest and certainly one of the most beautiful seaside promenades on the Adriatic, which passes through the famous and varied beaches of the "sunflower of the Mediterranean" (*Adriatic Croatia International Club d.d. –ACI marina Split, 2019*).

ACI marina Opatija is located in Ičići (North Adriatic), and is known for its wide jetty, where vessels of length up to 40 meters can berth. The positive side of ACI marina Opatija are its berths, which are one of the safest berths among the ACI marinas with respect to a well-installed breakwater. Berths at the sea (281 berths) and dry berths (35 dry berths) represent the two main services of the marina, with additional services to maintain the attractiveness of the location (*Adriatic Croatia International Club d.d. –ACI marina Opatija, 2019*). Rijeka, Zagreb, Trieste or Ljubljana airports are just a few hours away from the marina. The possibility of getting to Ičići by road for several hours from Vienna, Milan or Budapest, has made the ACI marina Opatija ideal for both short winter trips and for the beginning or end of the Adriatic cruises at any time of the year (*Adriatic Croatia International Club d.d. –ACI marina Opatija, 2019*). ACI marina Opatija stands out because of the clean environment, and this is the reason for obtaining the Blue Flag certificate. The Blue Flag is one of the significant reasons for choosing this destination. The climate of Opatija is favourable for nautical tourists, and Učka mountain protects vessels from the strong wind. The attractiveness and the beauty of the beach near the marina and the proximity of the city of Opatija, which is famous for its rich history, certainly attracts nautical tourists.

ACI marina Split has a capacity of 348 berths (out of which 30 are dry berths) (*Adriatic Croatia International Club d.d. –ACI Marina - Vez za Brod - Adriatic Croatia International Club d.d., 2019*). In 2013, ACI Marina Split was awarded the 3rd prize in the category of Best Middle Marinas in the Adriatic ("Tourist Flower - Quality for Croatia" award) (*Adriatic Croatia International Club d.d. –ACI marina Split, 2019*). The traffic connectivity is of a great importance to nautical tourists. ACI marina Split is connected with the rest of Croatia by bus lines or ferries, and the vicinity of Dubrovnik, which is the focus of tourism in Croatia, is also important.

ACI marinas Split and Opatija have enriched their services with the following (*Adriatic Croatia International Club d.d. –ACI marina Split, 2019*):

- the reception desk with an exchange office and a shopping point with rich selection of accessories from the ACI collection, cashpoint
- restaurant, café bar
- nautical equipment store, and clothing store, fishing gear store, charter agency etc.
- maintenance and repairs shop
- fuel station nearby
- Wi-Fi internet access etc.

Additional services are (among others): hydraulic cart, boat towing within marina premises, boat towing outside marina premises, fork lift service, supervised battery charging, vessel airing and inspection, sending photographs by e-mail etc. (*Other services-ACI marina, 2019*).

3. ANALYSIS OF BUSINESS INDICATORS OF ACI MARINA SPLIT AND ACI MARINA OPATIJA

The first set of indicators will show the number of berths, vessel calls, average capacity utilisation, revenues and expenditures of marinas. The number of vessels berthed in ACI marinas Split and Opatija in 2016 and 2017 will be compared in Table 1 (*Adriatic Croatia International Club, za djelatnost marina d.d., Opatija, 2017*). Vessel meters are also included to determine the vessel size in a particular marina since the size of the vessel depends on the price and the income of marinas.

Table 1: Indicators -Vessel Days and Meter Days

Marinas	Vessel days 2016	vessel days 2017	Period difference (2-1)	Meter days 2016	Meter days 2017	Period difference (5-4)
	1	2		4	5	
Opatija	96.801	107.858	11.057	1.147.184	1.265.754	118.570
Split	94.726	100.687	5.962	1.324.752	1.391.175	66.424

Source: <https://www.aci-marinas.com/wp-content/uploads/2018/04/Godi%C5%A1nje-izvje%C5%A1%C4%87e-2017-godinu.pdf> (19.06.2018.)

Despite a larger number of berths, in 2016 ACI marina Split recorded 94.726 vessel days, which is 2.075 vessel days less than ACI marina Opatija. In the year 2017, ACI marina Split recorded 7.171 vessel days less than ACI marina Opatija.

Table 1 also shows how many meter days were recorded in each marina. ACI marina Split recorded 177.568 meter days more than ACI marina Opatija in 2016. In 2017, ACI marina Split recorded 125.421 meter days more than ACI marina Opatija. ACI Marina Opatija recorded 118.570 meter days more in 2017, and ACI marina Split recorded 66.423 meter days more, compared to the previous year. The average capacity utilisation of both marinas in 2016 and 2017 is shown in Table 2.

Table 2: Average capacity utilisation in 2016 and 2017

1. 2. 3. Marinas	4. Average capacity utilisation in 2016	5. Average capacity utilisation in 2017
6. Opatija	7. 83,9%	8. 93,5%
9. Split	10. 74,6%	11. 79,3%

Source: Authors, based on <https://www.aci-marinas.com/wp-content/uploads/2018/04/Godi%C5%A1nje-izvje%C5%A1%C4%87e-2017-godinu.pdf> (19.06.2018.)

In order to calculate the average capacity utilisation of ACI marina Opatija in 2016, the indicator *Vessel days* (96.801) is used from the table 1. After dividing that number with the number of berths (annual capacity) in ACI marina Opatija (115.340 berths), the average capacity utilisation is calculated (83,9%). In 2016, the average capacity utilisation of ACI marina Split was 74,6% (the annual capacity was 127.020 berths). The improvement in 2017 is visible: the average capacity utilisation was increased to 93,5% (ACI marina Opatija) and 79,3% (ACI marina Split). Table 3 shows the revenues and expenditures of both marinas in 2016 and 2017 (*Adriatic Croatia International Club, za djelatnost marina d.d., Opatija, 2017*).

Table 3: Business revenues and expenditures in 2016 and 2017

Business revenues in 2016 and 2017 (000)				
MARINAS	BUSINESS REVENUES		DIFFERENCE OF PERIODS (2-1)	INDEX (2/1)
	2016	2017		
	1	2	3	4
OPATIJA	12.176.000	12.989.000	813.000	107
SPLIT	23.157.000	24.387.000	1.229.000	105
Business expenditures in 2016 and 2017 (000)				
MARINAS	BUSINESS EXPENDITURES		DIFFERENCE OF PERIODS (2-1)	INDEX (2/1)
	2016	2017		
	1	2	3	4
OPATIJA	9.772.000	10.222.000	450.000	105
SPLIT	12.523.000	11.584.000	-939.000	93

Source: <https://www.aci-marinas.com/wp-content/uploads/2018/04/Godi%C5%A1nje-izvje%C5%A1%C4%87e-2017-godinu.pdf> (19.06.2018.)

In 2017, the business revenues of ACI marina Opatija were 12.989.000 HRK (813.000 HRK more than in 2016), and the business revenues of ACI marina Split in 2017 were 24.387.000 HRK (1.230.000 HRK more than in 2016). In 2017, business expenditures of ACI marina Opatija were 10.222.000 HRK, (450.000 HRK more than in 2016), while the business expenditures of ACI marina Split were 11.584.000 HRK in 2017 (939.000 HRK less than in 2016).

5. SWOT ANALYSIS AND PROPOSED MEASURES FOR BUSINESS PERFORMANCE IMPROVEMENT

SWOT analysis has a “time dimension”, and the comparison and monitoring by SWOT analysis is useful to the enterprise at a different time points of the business processes (*Prometna povezanost Srednje Dalmacije | Rural Koncept*, 2018). The SWOT analyses of the ACI marinas Split and Opatija are presented below, and they include the positive perspective: strengths and opportunities, but also the negative perspective: weaknesses and threats. The following SWOT analysis helps to understand the business performance of ACI marina Split.

Table 4: SWOT analysis of ACI marina Split

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> • Affordable accommodation, high level of protection for vessels • Favorable climate • Recognizable destination • Good traffic connections • Attractive location • Vicinity of historical monuments • Friendly atmosphere and hospitality • Professional staff 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • Insufficient marina promotion • Absence of the Blue Flag certificate • Insufficient investment in the beaches • Lack of adequate facilities • High sojourn tax • Concession period up to 2030 • Short nautical season
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> • Monitoring the demand and accordingly introducing new attractive services • Investments in road infrastructure • Introduction of more modern information and communication technologies • Additional education and training for employees • Increasing the marina capacity • Foreign sources of funding 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> • New marinas and rapid development of existing marinas • Better and cheaper services of competitors • Increased service quality and specialization of other marinas • Permanent changes in legal regulations

Source: Authors

Although ACI marina Split is attractively located, the location itself is not sufficient to remain competitive in the nautical tourism market. It is important to additionally invest in the education and training of employees, as well as to enrich the marina with additional services. The following SWOT analysis helps to understand the business performance of ACI marina Opatija in relation to ACI marina Split.

Table 5: SWOT analysis of ACI marina Opatija

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> • Affordable accommodation, high level of protection for vessels • Blue Flag certificate • Attractive location • Mild climate • Recognizable destination • Vicinity of Rijeka, Pula and Trieste airports • Good traffic connections • Vicinity of historical monuments • Friendly atmosphere and hospitality • Professional staff 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • Insufficient capacity for larger vessels • Insufficient marina promotion • Insufficient parking places • Lack of adequate facilities • Short nautical season • High sojourn tax • Concession period up to 2030
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> • Increasing the marina capacity • Investments in road infrastructure • Introducing new attractive services • Additional education and training for employees • Foreign sources of funding 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> • Pollution of the environment • New marinas and rapid development of existing marinas • Better and cheaper services of competitors • Permanent changes in legal regulations

Source: Authors

The disadvantage of ACI marina Opatija, compared to ACI marina Split, is the inability to accept larger vessels. Therefore, “the extension of capacity” represents an opportunity. However, the potential environment pollution presents a serious threat.

Berths at the sea and dry berths represent the two main services of ACI marinas Split and Opatija, but the quality of additional services (e.g. organized city tours or diving courses) is very important as well. A survey “Nautical Attitudes and Consumption in Croatia - TOMAS NAUTIKA Jahting 2017” (Tomas Nautika-Institut za turizam, 2018), was conducted between July and October 2017, involving 1,666 respondents (nautical tourists from 14 countries). According to the survey, the activities of nautical tourists are: shopping, restaurants, pastry shops, cafes; diving, fishing, nature hiking, excursions to the National parks, sightseeing, museums and exhibitions, other sport and recreational activities in the sea and mainland, local events, dances or discos, concerts, theatres, water parks, wine tours and olive oil roads. Therefore, the aforementioned marinas should strive to improve the existing services, or to introduce additional services modelled on the services of more developed marinas, such as:

1. Diving and sailing courses
2. Enough parking spaces
3. Fuel supply for large vessels
4. Recycling services-waste separation
5. *Meeting midpoint* (a place to watch movies, arrange excursions, theme shows with animators, organized city tours)
6. Organization of day or evening events (organized walking or running)
7. Summer sailing school for children
8. Fitness area
9. Beauty centre
10. Children’s playroom
11. Pilates and aerobics courses in water
12. Vicinity of the shops with traditional products

6. CONCLUSION

ACI marinas Split and Opatija are a part of the ACI group, the leading company in Croatia with 5,649 berths. ACI marina Split, located in the Middle Adriatic, was awarded the 3rd prize in the category of Best Middle Marinas in the Adriatic (“Tourist Flower - Quality for Croatia” award). The average capacity utilisation was 74,6% in 2016 and 79,3% in 2017. ACI marina Opatija, located in the North Adriatic, has been awarded the Blue Flag which demonstrates the purity of the marina environment. The average capacity utilisation of ACI marina Opatija was 83,9% in 2016 and 93,5% in 2017.

Since ACI marinas Split and Opatija are under the ACI group, their basic and additional services are very similar (e.g., the reception desk with an exchange office and with a shopping point with rich selection of accessories from the ACI collection, cashpoint, restaurant, café bar, nautical equipment store etc.). Of course, berths at the sea and dry berths are the two main services of both marinas. However, the quality of additional services is very important for the demanding nautical tourists. The main additional activities of nautical tourists are shopping, excursions to the National parks, sightseeing, museums and exhibitions, sport and recreational activities etc.

SWOT analyses show that both marinas share the following strengths: high level of protection for vessels, good traffic connections, vicinity of historical monuments, friendly atmosphere and hospitality and professional staff. Their common weaknesses are: insufficient marina promotion, lack of adequate facilities, short nautical season, concession period up to 2030 etc. Opportunities for both marinas are: investment in road infrastructure, introducing new attractive services, additional education and training for employees and foreign sources of funding. Threats that both marinas face are: new marinas and rapid development of existing marinas, better and cheaper services of competitors and permanent changes in legal regulations. Compared to ACI marina Split, ACI marina Opatija is not able to accept larger vessels.

In conclusion, both ACI marina Opatija and ACI marina Split should introduce additional services modelled on the services of more developed marinas such as: organized city tours, diving and sailing courses, organized walking or running, fitness area, beauty centre etc.

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UNAPRIJEĐENJE POSLOVANJA HRVATSKIH MARINA (SLUČAJ SPLITA I OPATIJE)

Primljeno: 24. lipnja 2019.

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Stručni rad

Sažetak

U ovom radu bit će predstavljena usporedba ACI marine Opatija i ACI marine Split. Istražit će se karakteristike marina kao i njihovih usluga. Pokazatelji će prikazati broj vezova, brodskih poziva, prosječno korištenje kapaciteta, prihode i rashode. Napravit će se SWOT analiza obje marine; definiranje prednosti, slabosti, prilika i prijetnji. Dati će se prijedlozi za poboljšanja koja mogu biti primjenjiva na druge hrvatske marine i marine zemalja koje imaju slične karakteristike.

Ključne riječi: *nautički turizam, ACI marina Split, ACI marina Opatija, SWOT analiza;*

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