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# Nautical Tourism: Generator of Croatian Economy Development

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## ABSTRACT

In nautical tourism, Croatia has great potential for further development; from the conditions of navigation, safety, destination content, traffic accessibility, natural beauty, traditional hospitality and gastronomic offer of island and coastal places, etc. Its features, at the same time, are the advantages of competing countries: purity of the sea and coastal places, beauty and preservation nature, climate, security, hospitality, country image and spatial layout of the marina. The disadvantages relate to insufficient availability and nautical ports equipment, insufficient education, low level of technical service at nautical ports. The research aimed at analysing the current state of nautical tourism in Croatia. The methods used, based on the collected data, have been analysed. The results of the analysis rely on the existing state of nautical tourism, which determines the importance of additional investment in this form of tourism. The aim of the research is to define and shape the necessary measures and development strategies to achieve the purpose of research: the development of nautical tourism contributes to the growth of Croatia's economy.

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## 1 Introduction

Among the European countries, the small country of Croatia has one of the longest coasts. Natural beauty, clean sea, indented coastline and numerous islands, favourable climatic features, personal safety and traffic connection of the Adriatic Sea, are the bases on which the assumptions and plans for the future growth of nautical tourism will contribute to the growth of economy of the country. The characteristics of the Adriatic, as a certain advantage in the Mediterranean, are its affiliation with the warm seas and its position along the European mainland – the Adriatic is the deepest gulf of the Mediterranean Sea.

Nautical tourism in Croatia is an important factor in the development of tourism and of the Croatian economy. There are many untapped potentials that can, with a good plan and good development strategy, grow and enable Croatia to compete with other countries in the Mediterranean by offering them to the potential users. Investing in the infrastructure is an important means of

maintaining economic activity in times of crisis, thus stimulating the sustainable development of the country.

Ports of nautical tourism in Croatia have the annual revenue of about 95 million euros, of which the largest share, in some cases over 70%, makes up the revenue from the billing of berths.

The Croatian Adriatic coast is 1,777 km long and occupies most of its eastern coast. The total length of the coastline, with the islands included, is three times higher, totalling 5,835 km, which is about  $\frac{3}{4}$  of the total coastline in the Adriatic Sea. In accordance with *The United Nations Convention on the Law of the Sea*, Croatia exercises sovereignty over the relevant part of the Adriatic Sea, inland waters and territorial sea: a total of 31,067 km<sup>2</sup> which represents 35.4% of the total territory of the state [1, 4-5].

Thanks to natural resources, Croatia has the potential to be the unique market of the European Union in the field of nautical tourism, with data suggesting a steady growth in nautical tourism operations. As such a country, Croatia has become an increasingly popular tourist destination,

but at the same time asks for additional investments in nautical ports because of the lack of new berths.

## 2 Analysis of Nautical Tourism State

According to the *World Tourism Organization*, in 2016, 1.235 billion international tourist arrivals were recorded worldwide, which is 3.9% more than in 2015 and represents a new record level. Of the total number of international tourist arrivals, the largest share (50.2%) was realized in Europe, where, last year, the increase in tourist arrivals amounted to 12.2 million [2]. Tourism in Europe realizes 9.7% of the total EU (*European Union*) GDP (*Gross domestic profit*) revenue, and, by 2025, the figure is expected to increase to 10.4% [3].

After Europe, the Asia-Pacific region (24.5%) followed by nearly double the number of arrivals as compared to Europe (23.6 million international tourist arrivals more than in 2015). The highest growth was also recorded in Northeast Asia (11.8 million more) and Southeast Asia (8.6 million more). Other world regions (Americas and Africa) also recorded a growth, with the exception of the Middle East, which fell by 4.1% as compared to 2015 [2].

Europe is the leading area for nautical tourism in the world (70% of the total share of world tourism in nautical tourism is realized in the EU). With its 70,000 km of coastline, 27,000 km of waterways, Europe has more than 4,500 marinas with 7.75 million berths.

The importance of the development of nautical tourism is also presented by the data of the shipbuilding industry for nautical tourism in Europe. According to these data [4], 280,000 people are employed directly in the shipbuilding industry for nautical tourism, about 6 million crafts are sailing in European waters, and the total revenue from the shipbuilding industry turnover for 2011 in nautical tourism amounted to 20 billion € (*euros*).

Based on the conducted study [5], nautical tourism in Europe has created more than 234,000 jobs and achieves the annual revenue of 28 billion euros. About 48 million citizens of the European Union regularly participate in water sports, of which 36 million regularly take part in the activities on board crafts. More than 4,500 dry land and sea marinas have opened 70,000 new jobs with the annual turnover up to 4 billion € [6, 2].

The Mediterranean has a total of 407 marinas, 175 thousand berths (an average of 429 berths per marina), while the share of the total berths in the Mediterranean by a particular country reads as follows: France counts 46 marinas, Spain 84, Italy 148, Slovenia 3, Croatia 71, Montenegro 3, Malta 4, Greece 40 and Turkey 26 [7].

Of the nine countries in the Mediterranean, which have developed nautical tourism, Croatia has 9.7% share out of the total capacity in the Mediterranean. How much tourism, as an activity, is important for Croatia is also affected by the data on profit. According to the *Croatian National Bank* (CNB) data, earnings from foreign tourist amounted to 8 billion € and 635 million € in 2016, which represents

an increase of approx. 8 billion in 2010, which is 5% or 673 million € [8].

## 3 Nautical Tourism in the Republic of Croatia

Nautical tourism in Croatia plays a significant role. In addition to increasing the overall tourist turnover of a seasonal character, it should be developed into a long-term source of revenues as one of the drivers for the extension of the tourist offer in the pre-season and post season as well. Analysing the situation of Croatia, a developing country with a great potential and investing in this kind of tourism, could prove to be one of the possible drivers of the economic development in Croatia.

According to CBS (*Croatian Bureau of Statistics*) data, the total revenue from nautical tourism in 2016 was by 2.1% higher than in the previous year and, in 2010, amounted to 769 million HRK (excluding VAT) of which 539 million HRK referred to the income realized from renting berths, which means that about 70% of the total revenue of nautical tourism came from renting berths [8].

In Croatia, the ports of nautical tourism are classified into several types according to the Ordinance on Classification and Categorization of Nautical Tourism Ports [9]. Accordingly, the types of nautical tourism ports are determined by the type of services provided at the port. The ports of nautical tourism are classified into the following types offering:

1. Anchorage,
2. Dry land boat storage with no conditions for boaters to stay in,
3. Dry land boat storage with conditions for boaters to stay in,
4. Marinas.

The **anchorage** is part of the sea or water space suitable for anchoring floating crafts equipped with anchoring devices. The **dry land boat storage with no conditions for boaters to stay in** is defined as a part of the land enclosed and arranged for offering service facilities at the disposal of the floating crafts on dry land and providing transport, water discharge and pulling a craft out of the seawater and onto a dry land, whereby boaters cannot stay in the landfill of the craft nor can they prepare the craft for navigation. The **dry land boat storage with conditions for boaters to stay in** includes a part of the land that is enclosed and arranged to provide dry land storage facilities, transport, pulling a craft out of water onto a dry land. Unlike the dredging facilities, in a dry marina, boaters can stay and can prepare the sailing boat and other crafts for navigation, can provide beverage and food services. The **marina** is defined as a part of the water area and the coast, specially built and arranged for providing link services, tourist accommodation in the craft and other services in accordance with the Regulations, as well as beverage and food services in accordance with the Ordinance [9].

The Adriatic area is characterized by a strong tourist activity along the coastal area around the develop-

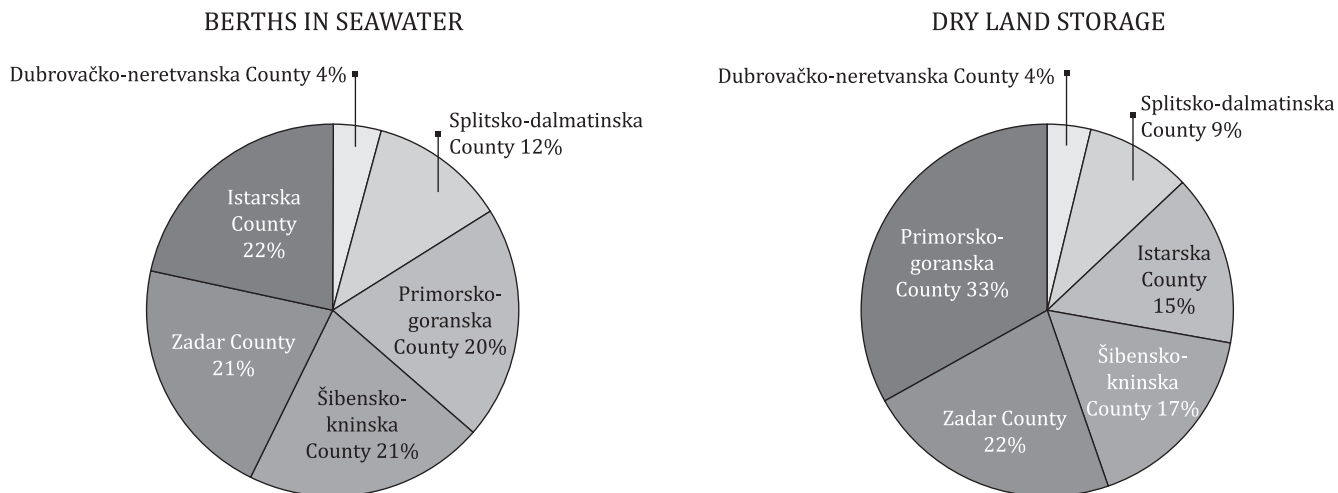


Figure 1 Schedule of Berth Capacities within the Counties

Source: Nautical Tourism Action Plan, Ministry of Tourism of the Republic of Croatia, Zagreb 2015, p. 15

ment centres of Istria and Kvarner (Rijeka, Pula), Middle Dalmatia (Split, Zadar, Šibenik) and southern Dalmatia (Dubrovnik) [1, 77]. According to the data [8], Croatia has about 17,000 equipped with berths for sailing boats and yachts and about 5,500 berths on dry land boat storage [10]. In 2016, there were 139 ports of nautical tourism, of which 58 were only anchorages, 71 marinas (of which 13 dry land boat storages) [8], 7 moorings and 3 unclassified ports of nautical tourism. Of all these, 22 marinas are part of the ACI (*Adriatic Croatia International Club*) chain [11], the majority of which is owned by the state, while all other nautical ports are under the concession regime where the concessionaires are privately owned Croatian and foreign companies.

The same number of nautical tourism berths can be found in the four northern coastal counties, while the Split-Dalmatia County, and especially the Dubrovačko-neretvanska one, lag behind in the available capacities for this purpose, while, with a share of 33%, the Primorsko-goranska County is dominating. These data are shown in the Figure 1 [10, 15].

Of the six counties, the greatest revenue of nautical tourism in 2016 was realized by the Šibensko-kninska

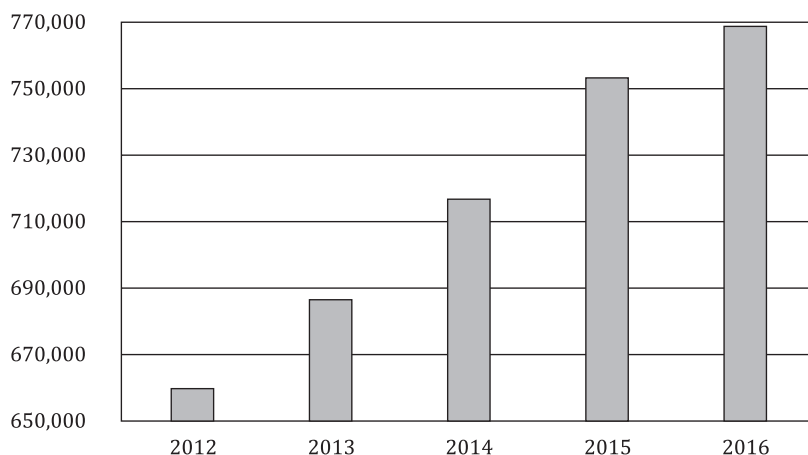
County, a total of 202,218 million HRK, which was 3% more than in the previous year, while in relation to 2012, the revenues increased by 12%. The most successful of the counties was also the Splitsko-dalmatinska County, which in 2016, generated revenues of 159,380 million HRK, up by 9% more than in 2015. According to the analysed data, the Splitsko-dalmatia County has achieved the largest total revenues from nautical tourism in the observed period of 5 years, in 2016, it increased by 58% as compared to 2012. In the same year, higher revenues than in 2015 were obtained by the Zadar County (3%) and by the Dubrovačko-neretvanska County (5.4%).

The Primorsko-goranska and the Istarska County were stagnant in 2016, while revenues in the previous year were somewhat higher. The revenues of the Primorsko-goranska County in 2016 amounted to 101,482 million HRK, which is 8.4% less than the previous year, while the Istarska County, with total revenues of 111,199 million HRK in the same year, was less than 1.8% compared to the previous year, and in 2015, up to 8% less compared to 2012, when the highest revenues were 120,825 million, while the Primorsko-goranska County increased by 2%.

Table 1 Revenues (in million HRK, excluding VAT) of the Nautical Ports in the Croatian Counties (from 2012 to 2016)

	2012	2013	2014	2015	2016
Primorsko-goranska County	99,019	97,724	97,963	110,778	101,482
Zadar County	141,689	143,627	151,020	154,704	159,393
Šibensko-kninska County	163,603	191,807	194,229	194,979	202,218
Splitsko-dalmatinska County	100,951	102,730	122,688	146,284	159,380
Istarska County	120,825	115,846	117,696	113,209	111,199
Dubrovačko-neretvanska County	33,903	34,926	32,959	33,458	35,266

Source: Created According to the Data of the CBS (*Croatian Bureau of Statistics*)



**Figure 2** Revenues (in million HRK, excluding VAT) of the Nautical Ports in the Croatian Counties (from 2012 to 2016)

Source: Created According to the Data of the CBS (Croatian Bureau of Statistics)

Analysing the total realized revenues of nautical tourism in Croatia from 2012 to 2016, revenues increased by 28,465 million in these years, and in 2016, revenues of 768,938 million increased by 17% more than in 2012 (Figure 2).

Nautical tourism for Croatia is of particular importance because of its economic efficiency and its developmental, untapped potential. According to the 2012 TOMAS NAUTIKA survey [12], every foreign tourist sailed for six or more times in Croatia, but three quarters sailed along the Croatian part of the Adriatic more than three times, while, in summer 2012, only every ninth foreigner (11%) sailed for the first time in Croatia. Every boater visited one or two marinas, and about one-third of the boaters visited four or more marinas during their sailing. On an average, boaters spent 12 nights, of which about 7 overnight stays in marinas and one or two nights in local ports and on buoys or at anchorages outside the local ports and marinas.

Annually, the Adriatic is visited by around 60,000 foreign yachts and sailing boats with more than 300,000 boaters, sea-lovers and active vacationers [13]. Given the opportunities that Croatia can offer as a tourist country to boaters, they expressed their satisfaction only with the beauty of nature and landscape and with the safety of life at sea and personal security. They also expressed their satisfaction with the gastronomic offer at the destinations, the traffic accessibility to the port and the spatial marina. However, they were partly satisfied with the breadth and quality of berths, the quality of technical services and catering services offered in marinas, toilet block facilities in the marinas and the supply of crafts. The charter offer, the availability of transit berths and equipment of the marina and the total nautical offer in Croatia were rated worse in comparison with Spain, France and Italy, the countries which, in the field of nautical tourism, are the main competing countries of Croatia.

#### 4 Economic Effects of Nautical Tourism

The influence of tourism as an activity, which may depend on the development of many countries, can generally be described through the action of numerous multiplier effects that contribute to the growing interest of tourism development, directly affecting the prosperity and thus the growth of the economy of the state. As tourism in a country is more present, its share in GDP is higher. In the less developed countries, it is considerably larger than in the developed ones. According to that, it can be concluded that less developed countries and countries in transition are partly dependent on tourism, i.e. that their development depends on the development of tourism activities.

The Croatian economy depends on tourism and even more than it is common in other countries. This can also be confirmed by the fact that, in 2016, foreign currency income from tourism in Croatia amounted to 18.01% of GDP, far the largest in Europe. Along with Croatia, a large share of tourism in GDP in 2016 was Malta (14%) and Cyprus (12.8%). In other EU countries, the percentage is smaller, some of which are Italy with 2.2%, France with 1.9% and Spain 4.7% of tourism share in GDP. It can be concluded that the development of Croatia and the development of its economy in general depends heavily on tourism.

The increased interest in investments in nautical tourism and the construction of ports arises from its high rates of profitability that is the result of a positive influence on many functions that are multiplied in this activity and effectively intertwine and realize high nautical tourist consumption by boaters and boats, on an average twice the consumption of the so-called classic tourists [14, 212].

Nautical tourism adopts its multiple effects to the richer quality of living, urbanization and landscaping and has a number of other effects. Through boating, numerous direct and indirect effects have been achieved for individual economic sectors and for the economy of the country as a



whole. The effect of the boating consumption is achieved by direct and indirect revenues, which affect the growth of individual branches of the economy. Marinas represent complex facilities offering a whole range of services and often realize a higher profitability rate of capital invested in their construction than that invested in other types of tourism. The same is achieved by builders, shipbuilders, merchants, caterers and all those who have indirect effects from selling their products through catering and trade services to yachtsmen.

Profitability in nautical tourism varies and is the result of various factors [15, 29]:

- micro-location,
- fundamental market factors,
- specifics of business (seasonal business),
- the rate of investment in supra- and infrastructure due to lower primary effects and long depreciation (up to 20, 30 and even 50 years).

Revenues generated by the consumption of boaters are divided into direct and indirect revenues. The direct revenues of nautical tourism are [16]:

- revenues from floating facilities on a permanent annual basis in the ports of nautical tourism,
- revenues from transit berths,
- seasonal bond revenues,
- revenues from nautical berths in the port area open to public transport,
- revenues for maintenance and repair of boats and engines in nautical ports and other services,
- revenues generated by chartering,
- revenues from cruise ships,
- incomes from various fees (registration of vessels / entry fees, issuance of vignettes for yachts and boats, sojourn tax),
- revenues from concessions on maritime domains and
- revenues from propulsion fuel sale.

Indirect revenues are made up by the effect of boating consumption at destinations: consumption of drinks in cafés and restaurants, museum tours, historical sight-seeings and organized excursions, boating consumers at markets, fish farms, various other grocery stores and other places of consumption. Indirect revenues also include revenues generated by the transport and manufacturing branches of economic activity (transport, shipbuilding, refurbishing shipyards).

Figure 3 shows how nautical tourism affects the branches of economic activity by the effect of boating efforts (it directly affects tourism, and indirectly affects the development of trade and hospitality, shipbuilding and traffic/transportation). Investing in nautical tourism would also stimulate the development of other activities in the country. An example might be a small domestic shipbuilding, which would have potential for the shipbuilding development as a production activity, construction of small boats for nautical tourism, which would stimulate development and other activities related to small shipbuilding, employment, etc.

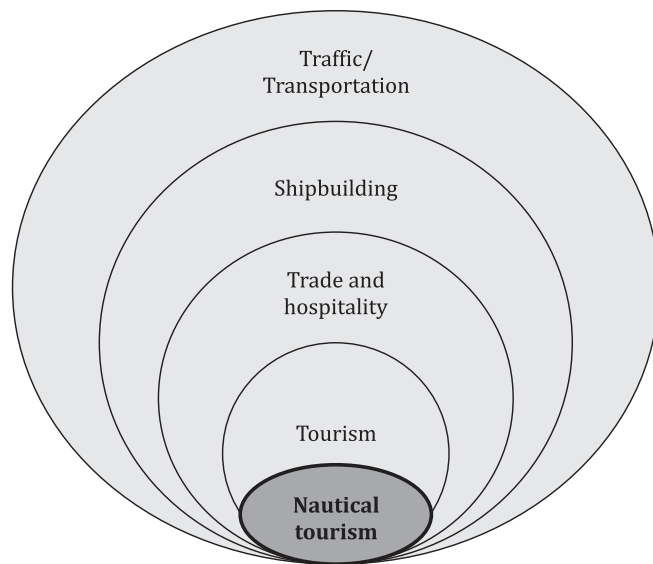


Figure 3 Economic Activity Branches

Source: Author

Croatia is one of the few countries that have the rich potential that needs to be utilized and maintained in a functional and sustainable way in the future. The development of nautical tourism can have a major impact on Croatia's economy as well:

- development of domestic (small) shipbuilding and shipbuilding renovation would have developed a manufacturing activity,
- the nautical form of tourism - as the main driver of the season extension - growth of income and employment (employment for more than 2 months),
- development of nautical tourism – sustainable development - a possible form of ecotourism development,
- introduction of new technology and innovation (improvement, further education and training of the staff).

Development of this type of tourism should be considered on a long-term basis, especially in the context of sustainable development and environmental protection. New investments would have positive effects on both the economy and the population of Croatia, raising the level of welfare of the population (growth of income and employment). Nautical tourism is of the greatest importance to Croatia, and new investments are crucial for the further development of such a vision of tourism. The exceptional significance of nautical tourism in stimulating development and the overall economy is reflected in the following benefits:

- nautical tourism has the highest and most powerful effect of the multiplicative effect, which would definitely be the first competitive product of Croatia in the world as soon as possible,
- it is a branch of tourism that provides a minimum of 180 to 210 business days a year, and the turnover of

the invested capital in relation to hotel facilities is much more dynamic,

- there are fewer investments for the same number of accommodation units,
- the return of the invested capital is up to two times faster than in other branches of tourism, - bringing financially stronger and more quality clientele, which promote quality and enhances the image of the destination,
- the comparative advantages are almost crucial for the development of nautical tourism in comparison to Croatian competitors in the Mediterranean [14, 212-213].

According to the research carried out and analysed in the last five years (2011-2016), Croatia had a total of 98 ports of nautical tourism in 2011, and up to now the number of ports has increased to 139 [8], on an average of about 8 new nautical ports<sup>1</sup>. The lack of the infrastructure for the reception of crafts near cities and islands has a major impact on the nautical tourism revenues. The nautical form of tourism can in the future be one of the main drivers of the regional economic development and of the Croatian economy in the country level. Investing in its development and expansion would have a positive impact on other activities, such as manufacturing (domestic, small shipyards), various other service activities (catering, service facilities). In addition, such a form of tourism attracts the clientele of greater monetary power, which raises the quality of the destination to a higher level, thus increasing tourism spendings and, at the same time, the revenues generated by tourism increases.

## 5 Development Strategy

According to the research carried out in this paper and based on the analysis of the existing data, the obtained results have indicated the importance of investing in a nautical tourism form, and the fact that development has stagnated for a couple of years while the demand for such a form of tourism is constantly increasing. Croatia as a country with great potential for development, thanks to its natural beauties and position, may and should strive better, because productive development could have more than any competitive country in that sector. The natural wealth that Croatia owns is based on the made assumptions and plans for the future economic development of the state, which makes it so special, as well as on one of the few strategic advantages Croatia has on the world level.

The basic strategic goals of nautical tourism in Croatia were laid down in the Strategy for the Development of Nautical Tourism of the Republic of Croatia for the Period 2009 - 2019 [16] and the Tourism Development Strategy by 2020 [13]. As a continuation of the planned activities of

nautical tourism development in Croatia, the Action Plan for the Development of Nautical Tourism [10] adopted in 2015 under the guidance of the Croatian Ministry of Tourism. The plan was designed with the intention of correcting goals and measures of the 2009-2019 Strategy and the results that were expected were not carried out with the planned dynamics.

According to the Croatian Spatial Development Strategy [16], adopted by the Croatian Parliament in September 2015, pursuant to Article 81 of the Constitution of the Republic of Croatia and Article 52 paragraph 2 of the Physical Planning Act (*Official Gazette No. 153/2013*) [17], a moderate scenario for the development of nautical tourism has been adopted, based on the established carrying capacity of space, a moderate annual growth rate and a balanced regional development principle with the potential to deviate due to the characteristics of some counties.

An important factor in the development and improvement of nautical tourism are the natural conditions and the material basis, the resources and the current investment construction. Infrastructure construction implies the construction of appropriate tourist ports and the infrastructure needed to meet the needs of users who will attract a greater number of yacht tourists and contribute to their retention in ports [18, 141]. In order to develop nautical ports, it is necessary to continuously stimulate developmental and research studies and to expand the cognitive basis from the position of modern worldview, and to provide continuous activity that will enable the process to be seen and view interest in the function of timely provision of spatial-development options to investors and realization of spatial assumptions for development [19, 134].

One of the main goals in the strategy is to increase the capacity and the quality of nautical tourism. This implies introducing "green" technology and innovation in the development of supply and management, creating an effective system of environmental protection and nature, increasing the abovementioned boating consumption, and increasing the safety of sailing and rescue at sea.

It is necessary to create an effective system of environmental protection a, harmonize legislation and, in addition, harmonize official terminology. This system should manage all the necessary data (create an application) and create a tracking system, enabling data to be aggregated into a single file and so used to others. Likewise, the introduction of "green" technology and innovation in the development of nautical tourism can create a system of statistically monitoring data on nautical tourism in Croatia (record of all capacity, number of companies, number of vessels and traffic inside and outside the ports open to public transport).

The aforementioned system needs to provide publicly accessible databases needed to manage the nautical tourism system (collection capability, companies, crafts). The technology would enable monitoring the overall economic effects of nautical tourism, a continuous monitoring the characteristics of nautical tourism, and would contribute to further research in the field of nautical tourism, par-

<sup>1</sup> Includes: *Anchorage, Moorings, Marinas and Uncategorized Nautical ports*

ticularly on elements related to environmental and natural resources protection. It is necessary to develop nautical tourism in a sustainable manner, meaning that the environment and nature are the primary tourist resources that make it a destination and realize tourist consumptions. Their proper protection is a precondition for a sustainable and successful development of tourism and nautical tourism as well.

Incomplete, inconsistent and inadequate legislation makes it difficult to achieve the sustainable growth. First of all, the Maritime Law and Sea Ports Act, the Physical Planning Act and the Nature Protection Act need to be improved in order to achieve the goal of nature protection and effective maritime concession system. Maritime Domain represents an economically important and scarce resource; it is a general good of special interest where no one has the right to acquire ownership. In order to achieve an efficient economic use of the maritime domain, it is important to properly and consistently categorize the maritime assets and the concession on the maritime domain.

With the development of the nautical form of tourism, the state is developing, the economic growth is growing, and a positive action remains also on local communities. When the ports of nautical tourism have been built on sites that are relatively poorly developed, they have taken on the role of local development drivers. At such port locations, they develop their products and services to the highest degree of quality. By developing her services, the port also conditions the development of the destination to which she gravitates. Likewise, the developed hinterland of nautical ports contributes to its positive development [20, 65].

## 5 Conclusion

The results obtained have shown a rise in nautical tourism turnover over the past five years, and the revenue generated by the "spending effect" of the yachtsmen directly and indirectly affects the development of certain branches of the economy. According to the analysed data, nautical tourism is profitable and because of its profitability and long-term investment opportunities, it creates interest in investing in the future. With the development of nautical tourism, the building of new ports in areas that are less developed, the newly built nautical ports act as drivers of the development of the site, thus stimulating the development of the region and acting on the growth of Croatia's economy.

According to the research carried out, the number of nautical berths intended for nautical tourism is located along the north coastal counties: Primorsko-goranska, Istarska, Zadarska and Šibensko-kninska County, while the Splitsko-dalmatinska, and, especially, the Dubrovačko-neretvanska County, lag behind the available capacities for this purpose. Insufficient number of berths nearby cities and islands affect the further development of nautical tourism. According to the research carried out, in the observed period of five years, on an average, the annual

number of nautical ports increased by only approximately 8 nautical ports each year, resulting in a lack of boat chartering facilities. For a particularly maritime country as Croatia is, where the number of nautical berths and the building of new berths is stagnant from year to year, it is necessary to abolish this law, which will make it easier for future investors and speed up the process of building new berths, needed for the further development of nautical tourism.

Incomplete, incompatible and inadequate legal regulations facilitate the operation of the existing economic operators in nautical ports, slow down and hamper the potential for the sustainable growth and development of nautical tourism, and that is why the most important thing is to regulate the management and economic use of the maritime domain. In addition, the development of nautical tourism should be developed as an effective system of nature and environmental protection, in order to increase the quality of nautical tourism.

The development of this type of tourism should be a long-term process and the development of the capacity expansion need to follow the protection and improvement of natural resources. New investments would have positive effects on the economy and the level of welfare of the population in Croatia. Nautical tourism is of great importance to Croatia, and new investments are crucial for the further development of such a vision of tourism. The Nautical Tourism Development Plan together with the Development strategy should find ways to implement their goals. While investors are missing, interested parties to invest in this kind of tourism have been growing over the last few years. The problems that arise when implementing the set of goals should be solved by a new strategy and a law that will facilitate the achievement of concession at the maritime domain, and future investments could be monitored in a proper way.

The research carried out and data analysed in this paper can be used for further research on nautical tourism and for the adoption of a new strategy plan and development of nautical swarms in Croatia.

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