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## DEVELOPMENT TRENDS OF NAUTICAL TOURISM IN THE PRIMORSKO–GORANSKA COUNTY

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**Abstract:** The development of nautical tourism in the Primorsko-Goranska County is based on the region's attractive natural resources (the indentedness of its coastline and islands, its favourable climate and fairly well-preserved natural environment), its developed infrastructure systems (with all their advantages and weaknesses), its vicinity to major markets, and as well as on the personal safety of boaters and the safety of navigation.

Major weaknesses are reflected in the lack of tourist facilities and in the low level of the structure and quality of the offering of nautical tourism ports in comparison to boater expectations. Redressing these weaknesses will help future development converge with the desired goals. Based on an analysis of nautical tourism development, it is essential to set the guidelines of future development, taking into account the protection and conservation of natural resources and the application of the concept of sustainable development.

*Key words:* nautical tourism, situation and options, development guidelines.

**Sažetak:** RAZVOJNE TENDENCIJE NAUTIČKOG TURIZMA U PRIMORSKO-GORANSKOJ ŽUPANIJI. Razvoj nautičkog turizma na području Primorsko-goranske županije ima uporište u atraktivnim prirodnim resursima (razvedenost morske obale i otoka, povoljne klimatske prilike i relativno očuvana priroda), razvijenom infrastrukturnom sustavu (koji ima svoje prednosti i nedostatke), blizini glavnim tržištima, te osobnoj sigurnosti nautičara i sigurnosti plovidbe.

Kao glavni nedostatak ističe se nedostatak kapaciteta, niska razina strukture i kvalitete ponude luka nautičkog turizma u odnosu na ono što nautičari očekuju. Otklanjanje nedostataka rezultirati će približavanju budućeg razvitka željenim ciljevima. Stoga je nužno na temelju analiza razvoja nautičkog turizma dati strateške odrednice budućeg razvoja uz uvažavanje zaštite i očuvanja prirodnih resursa i primjenu koncepta održivog razvoja.

*Ključne riječi:* nautički turizam, stanje i mogućnosti, razvojne odrednice.

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## 1. INTRODUCTION

Nautical tourism in the Primorsko-Goranska County began to develop spontaneously in Punat on the island of Krk in 1964, but not before the 1980s did it acquire the semblance of a devised and organised system. Today the County's nautical tourist trade has 2,810 berths in nautical tourism ports that do not meet the expectations of modern tourists.

As an increasingly attractive form of tourism activities, nautical tourism needs to be more fully implemented in the strategic documents of tourism development in the Primorsko-Goranska County, with special emphasis on constructing new receiving facilities and improving service quality in the existing ones. Given the fact that the natural resource base is a primary factor of nautical tourism development, environmental protection should be a top priority in developing nautical tourism.

## 2. FEATURES OF THE NAUTICAL TOURISM OFFERING OF THE PRIMORSKO-GORANSKA COUNTY

The geographical position of the Primorsko-Goranska County provides it with strong comparative advantages for the development of nautical tourism. These advantages are reflected in the vicinity of tourist generating markets and the relatively well-preserved and diverse natural resource base suitable for nautical tourism development (the indented coastline, favourable climate, vegetational diversity; natural attractions such as Vrana Lake and the Učka Nature Park; cultural assets, the vicinity of outbound tourism markets...).

The Primorsko-Goranska County has a developed system of marinas, ports and boat harbours that is characterised by specific advantages and weaknesses. In 2005, the County accommodated boaters in 21 ports of nautical tourism having 2,850 mooring berths and 1,649 berths on land and a total water area of 610,913 m<sup>3</sup>. For the most part, these are stationary ports, the majority owner of which is the company ACI Club.

Although minor advancements in improving the service quality in the County's ports of nautical tourism are evident, in particular in the Punat Marina, the quality of the offering has not yet reached the level boaters expect to find. In addition, demand is considerably greater than supply, indicating the necessity of increasing the number of berths. New facilities in nautical tourism ports, as well as new ports, should be constructed exclusively in inhabited places in which the required municipal and transport infrastructures already exist, or alternatively in previously devastated areas in which the construction of a marina would represent an improvement to the environment. There are plans to increase the number of berths in the County by 3,100 to be located in Lovran, Rijeka, Bakar, Crikvenica, Novi Vinodolski, Stara Baška and Nerezine, making a total of 5,910 berths.<sup>2</sup> Given the great spatial opportunities that exist for accommodating and organising nautical services and facilities, care should be taken in the planning and designing stage to thoroughly valorise the surrounding

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<sup>2</sup> Study on Nautical Tourism Development in the Republic of Croatia, Croatian Hydrographic Institute *et al.*, Split, 2006, p. 158.

environment so as to fully tap the potential of the selected location and to prevent the planned intervention from disrupting the location's environmental equilibrium.

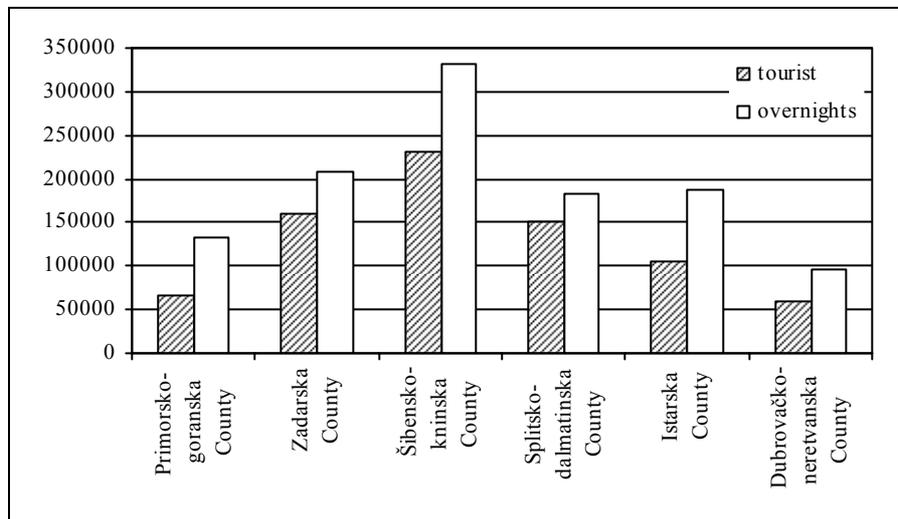
In the 2003 – 2005 period, the County's charter segment has seen a decline from 246 to 115 in the number of charter licences issued.<sup>3</sup> At the same time, there has been an increase in the number of charter licences issued in the counties of central Dalmatia, leading to the conclusion that charter companies have relocated their vessels to Dalmatian destinations in which there is a greater demand for this form of the nautical tourism offering. The charter offering represents an exceptionally important segment of the integral nautical and tourism offering, a fact that should be taken into account when defining future development.

### 3. DEMAND FOR NAUTICAL TOURISM SERVICES IN THE PRIMORSKO-GORANSKA COUNTY

In the overall tourism traffic of the Primorsko-Goranska County, nautical tourism accounts for only 3.2 per cent of all tourist arrivals or 1.3 per cent of total overnights in 2005.

Although claiming an 18.9 per cent share of the total number of berths in Croatia (2005), the Primorsko-Goranska County realises only 8.7 per cent of all tourist arrivals and 11.7 per cent of tourist overnights, a fact that highlights the discrepancy between the tourism-related revenue generated and the potential that the County has in developing nautical tourism.

**Figure 1:** Tourist and overnights in nautical tourism ports per county



Source: Tourism – cumulative date, for the period Jan. – Dec. 2005. Central Bureau of Statistics of the Republic of Croatia, Zagreb, 2006, p. 16.

<sup>3</sup> UNTH Grupacija iznajmitelja plovila (charter) Hrvatske, <http://hgk.biznet.hr> (9.11.2006.)

In comparison to 2004, tourism traffic in 2005 recorded a drop of 11 per cent in tourist arrivals and 22 per cent in tourist overnights.

In 2005, the total number of vessels on permanent berthing amounted to 3,087; 75 per cent of these vessels used sea-berths. In the same year, there were 17,105 vessels in transit or 8.5 per cent of the total number of transit vessels in Croatia.

The low service quality in the County's ports of nautical tourism has resulted in income levels that are substantially lower than potential levels; also, the structure of the income is not favourable (permanent berthing generates more than 80 per cent of overall income in marinas).

**Table 1:** Income realised in nautical tourism ports, VAT excluded

	2004	2005	Index 2005/2004
Total	59,071	59,333	100.4
Berth rentals	46,906	48,156	102.7
Permanent	38,808	41,059	105.8
Transit	8,098	7,097	87.6
Servicing	2,105	1,189	56.6
Other income	10,060	9,988	99.3

Source: Nautical tourism – Capacities and performance of ports of nautical tourism in 2005, <http://dzs.hr> (8.11.2006)

#### 4. SWOT ANALYSIS OF NAUTICAL TOURISM IN THE PRIMORSKO-GORANSKA COUNTY

Understanding the County's nautical tourism offering and its competitive position on the Mediterranean market makes it possible to identify its strengths and weaknesses, opportunities and threats, as presented in the SWOT matrix (Figure 2).

Natural resources have been identified as major attraction factors of the Primorsko-Goranska County, making the protection and preservation of these resources a key guideline in nautical tourism development. Factors impacting favourably on the County's competitive position include the safety of boaters and safe navigation, the vicinity of major outbound tourism markets, the existing nautical infrastructure and other factors.

**Figure 2:** SWOT matrix of nautical tourism in the Primorsko-Goranska County

<p><b>Advantages</b></p> <ul style="list-style-type: none"> <li>- scenic spots, clean sea</li> <li>- indented coastline</li> <li>- numerous islands</li> <li>- favourable climate</li> <li>- biological diversity</li> <li>- ecologically preserved landscapes and seabed</li> <li>- small scope of construction along the coast</li> <li>- geographical position (vicinity of outbound tourist markets, relative to Istria and Dalmatia)</li> <li>- transportation connections/accessibility (developed road infrastructures, air port)</li> <li>- nautical infrastructure (nautical ports)</li> <li>- tradition in the tourist trade</li> <li>- level of tourism development</li> <li>- qualified human resources</li> <li>- educational institutions for tourism and hospitality</li> <li>- good existing organisation in ports and boat harbours</li> <li>- safety in navigation</li> <li>- developed environmental awareness of residents</li> <li>- possibility to increase number of berths in existing ports and boat harbours</li> <li>- possibility to construction new berths in areas that previously had other usage</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>- insufficient number of berths, in particular for larger vessels</li> <li>- inadequate facilities in marinas to accommodate mega-yachts</li> <li>- pronounced seasonal feature of demand</li> <li>- inappropriate price of service (value for money)</li> <li>- technological obsolescence relative to competitors</li> <li>- cooperation with other tourism supply providers (catering establishments, trade...)</li> <li>- insufficient number of charter companies</li> <li>- overloading of berths in the summertime</li> <li>- poor offering of other tourism providers</li> <li>- poorly coordinated legal regulations (customs, ministries, port authorities)</li> <li>- insufficient number of maritime border crossings</li> <li>- geographical position (unattractive aquatorium relative to neighbouring counties)</li> <li>- transportation connections (local network, links with the islands)</li> <li>- insufficient number of fuel stations (for boaters)</li> <li>- poor infrastructure in boat harbours</li> <li>- lack of a clear development strategy of nautical tourism</li> <li>- opinions of professionals are not taken into account in drawing up new regulations</li> <li>- insufficient practical knowledge/lack of appropriate education</li> <li>- administrative barriers</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>- EU accession – opening of a single market</li> <li>- growing world demand in nautical tourism (growing demand for berths)</li> <li>- trends in tourism (short-haul destinations, easily accessed, safe, protected nature)</li> <li>- Croatia is becoming an increasingly popular destination</li> <li>- opening of new markets</li> <li>- further improvement of transport accessibility</li> <li>- adoption of nautical tourism development strategy</li> <li>- favourable climate conditions can help to significantly prolong the tourist season</li> <li>- expected stability of the region</li> <li>- development of local small-scale shipbuilding</li> <li>- eco-tourism development</li> <li>- improvement in the quality of other tourism offerings</li> <li>- foreign investments</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>- uncontrolled development of nautical tourism due to lack of strategy - loss of product attraction</li> <li>- conflicts with other resource users (other forms of tourism, marine farming, navigable waterway, etc.)</li> <li>- environmental pollution</li> <li>- excessive construction along the coast</li> <li>- poorly developed environmental awareness and awareness of the necessity of preserving biodiversity</li> <li>- inadequate legal, planning and other regulations</li> <li>- political instability of the region</li> <li>- terrorism</li> <li>- emergence of new contagious diseases</li> <li>- disruptions on outbound tourist markets</li> <li>- inadequate privatisation process</li> </ul>

Source: Study on Nautical Tourism Development in the Republic of Croatia, Croatian Hydrographic Institute *et al*, Split, 2006, p. 158.

On the one hand, the existing nautical infrastructure represents an advantage for the future development of nautical tourism in the Primorsko-Goranska County, as well as for the achieved development of other tourism offerings, while on the other hand, a considerable weakness of the present state of nautical tourism can be found in the marina offering and service level, including the level of technical services. Another weakness is the insufficient number of berths for boaters, as a result of demand being greater than supply, in particular, demand for berths for longer and larger vessels in accordance to world trends and trends in nautical tourism. A range of other weaknesses is also evident (a lack of charter vessels, weaknesses arising from unsuitable legislature and various administrative procedures...) which will need to be eliminated or reduced to the least possible extent in the future. Special attention should be focused on issues relating to excursion vessels, mini-cruisers sailing the Croatian coast, scuba diving, fishing, etc.

Improvements to service quality, planned incentives to small-scale shipbuilding development, and interest for foreign investments in nautical tourism are factors that exert a positive impact on the development of nautical tourism in the Primorsko-Goranska County.

Threats to nautical tourism development include: environmental pollution, excessive construction along the coast resulting in a loss of the tourism product's attraction, possible conflicts of interests with other users of the region's resources (sea and coast), disruptions on outbound tourist markets, etc.

## CONCLUSION

The analysis of the situation, options and development trends in the nautical tourism of the Primorsko-Goranska County represents a basis on which to build this form of tourism as a well-devised, organised, competitive and manageable system. Despite its disadvantages and weaknesses and its small share in the County's overall tourist traffic, nautical tourism has a special mission of development that is based not only on the aspect of developing a distinct brand of tourism in the County, but also on the aspect of the economic development of the County's island and maritime regions.

Based on the situation identified, it is necessary to formulate the strategic development of nautical tourism, striving to ensure a sustainable, well-designed, competitive, sound, manageable and economically effective system capable of securing the high efficiency, and continuous and sustained development of nautical tourism, in alignment with the guidelines of tourism development in the Primorsko-Goranska County.

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