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An Analysis of Nautical and Cruise Tourism in Slovenia (2005-2015) and its Position among other Mediterranean countries

Abstract

This article is dedicated to presenting nautical tourism in Slovenia. The basic purpose is to evaluate the extent of nautical tourism, since data on this type of tourism in Slovenia are lacking. Slovenia has three marinas, a few moorings and a passenger terminal. Despite its small coastal strip (46 km), all forms of nautical tourism are represented. This article consists of theoretical and analytical work. The theoretical part presents a number of basic definitions relating to nautical tourism and cruises. This work will also present the development of this form of tourism in Slovenia to date. Slovenia's first marina was built in 1979 in Portorož, while cruise tourism in Slovenia began later, in 2005. Due to its diversity in a small area, Slovenia is an ideal starting point for (maritime) excursions. In the analytical part, numerical traffic data for the period 2005 to 2015 from marinas and the Port of Koper have been collated and analysed. This work is based on data collected by the marinas themselves, since the official nautical traffic statistics are not recorded. The main results of our analysis indicate that nautical tourism in Slovenia has experienced a large decline since 2005. The exception is cruise tourism, which has shown strong growth.

Key words: nautical tourism, cruise, Slovenia, marinas, Koper, Portorož, Izola

1. Introduction

The purpose of this work is to show the development of nautical and cruise tourism in Slovenia over the last ten years. Despite having only 46 km of coastline, Slovenia's Coastal - Karst region supports a variety of nautical tourism. The main contribution to this work is the collation and processing of traffic data from individual locations, since national statistics do not record these forms of tourism.

The beginnings of nautical tourism in Slovenia date back to the 1960s. Marina Portorož was the first marina in Slovenia, opening in 1979. Due to the high demand for such services, this was followed by the opening of Marina Izola and in Koper a while later. In Slovenia, there are three specialised ports for yachts - marinas. There are additional public quays in all three municipalities of Slovenian Istria and at the yacht centre in Izola. All three marinas are recognised European Blue Flag programme sites. Cruise ship docking takes place in the Port of Koper.

Cruise ship tourism has existed in Slovenia since 2005, when the first cruise ship docked at the Port of Koper, marking a consistent rise of the arrivals since then. This has been facilitated by rapid, efficient and focused development.

Nautical tourism has stimulated the construction and development of marinas along the Slovenian coast. These are actual tourist centres, offering virtually all the elements of a tourist offer (restaurants, hotels, shopping, and so on). They have become important business centres, as links with other technical and production services allow for cooperation with other parts of the local economy [11].

Nautical tourism contributes to the integration with other activities (day trips, events, sports, and so on). This also increases tourism-based consumption by passengers. With such additional activities, visitors experience new insights and form impressions of unfamiliar places and people [6].

Cruise ships are the fastest growing sector of nautical tourism [3, p.3]. In economic terms, they are very important. In terms of ship owners, we refer to companies such as Carnival Cruise Line, which began operating in 1972 with just one vessel. By 2006, the company owned 83 vessels, accommodating up to 150,000 passengers. In terms of employment, a single cruise ship creates many different jobs. This can mean up to, and over, 1,000 employees on the largest cruise ships. Cruise lines also employ people on land and in expanding the extent of their involvement with travel agencies and hire services in destinations visited during their voyages. [14, p.3].

Cruise ships, which were the luxury end of the travel market, have developed into a more affordable leisure activity. More and more people are choosing this type of vacation, similarly, from the safety point of view, because in this day and age, when we are threatened by terrorism, cruises are one of the safest forms of travel. For passengers, this has become a very popular and attractive way of spending leisure time, since one can encounter many new experiences on board in a short space of time - new insights. Passengers visit many places, meet new people and become familiar with different cultures. Cruises have everything they need in one place, making it an easier and more

effective use of holiday time. There are daily excursions to learn about new places or even another country. Today's cruise ship passengers have a large variety of activities at their disposal. Passengers are able to retreat from everyday noise, pollution and obligations in an environment that offers them fresh air, the sea and beautiful views of the sea and coastline. They can also choose whether to spend their holidays being active, or to spoil themselves. Cruise ships also provide opportunities for duty-free shopping.

In conclusion, nautical tourism is a very important and profitable industry in places where it has been implemented. This greatly contributes to the development and visibility of the region. Given the (many) technological advances, it also offers great possibilities for future supply (and service) development. Demand for cruise ship travel has been increasing year on year. The result is the development and expansion of cruise line fleets, demand for personnel and offers for more vessels and new destinations.

2. Nautical tourism

Nautical tourism is a very broad notion. Nautical tourism includes all types of travel by sea, and boating on rivers and lakes. (As such,) there are many different definitions that attempt to describe it, including those by the authors below:

- this type of tourism not only takes places on the sea, but also on rivers, lakes and their shorelines, on leased and owned vessels, for the purpose of recreation, entertainment and sport on still water or at sea. [20]
- nautical tourism is a type of tourism related to nautical activities such as: sailing, viewing and buying vessels, and associated infrastructure. [16]
- nautical tourism is part of maritime tourism, which on the one hand represents a community of permanent, frequent or occasional voluntary social events, activity and travel by tourists at the sea and coasts and on rivers, lakes and canals using their own, rented or foreign tourist vessels, in tourism ports and other maritime - nautical - shipyard facilities and infrastructure for fun, relaxation, sports, passive and active recreation, relaxation, environment, health, cultural and other reasons, and this is all tourism, not just for profit; on the other hand, a set of organised economic affairs and functions with the aim to rationally plan and facilitate, develop and improve these events and activities, in order to create and increase income. [8, p.188]
- nautical tourism is a multi-functional tourist activity with a strong marine component. We can also classify nautical tourism into three main branches, which are: marina operations, (yacht) charters and cruises. [13, p.401]
- nautical tourism means the navigation and accommodation of tourists - passengers on cruise ships and in nautical ports for the purpose of rest and recreation. The difference between nautical tourism and other forms of tourism is just sailing. This offers the nautical tourist considerable mobility and frequent changes in where to stay. [17, p.5]

- nautical tourism is a specific tourism product that focuses on attractions and fun-related activities on or near the water. The tourist experience is based on combining elements such as boating, marine research, sailing, diving and eco-tour attractions for holidaying and special occasions. Nautical tourism has become one of the most profitable industries, which has introduced new ways of viewing and exploring the world. [1, p.7]
- in defining nautical tourism, it is important to note that this tourist activity is not an isolated or specific branch, but an association of many industries with specific public administration, infrastructure and general supplementary services. Nautical tourism should therefore be seen as a tourist attraction associated with recreational activities on or near the water, offering a large variety of nautical activities, always with environmental interactions and a respect for nature. [10, p.462]
- nautical tourism is any tourism-based travelling on or near the water utilising different vessels, which may be for fun, sports or scientific purposes. Since this type leisure tourism involves so many people, nautical tourism can be considered a type of mass tourism. Given the high costs of nautical tourism it can be considered one of the most elite forms of tourism. [22]

The fundamental characteristics are well illustrated in Figure 1:

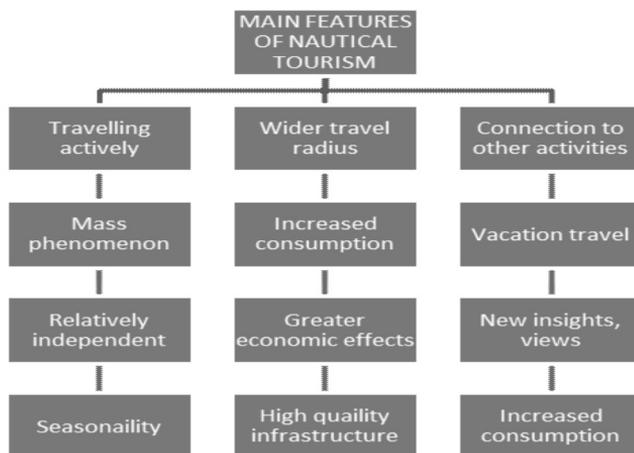


Figure 1: Fundamental characteristics of nautical tourism
Source: [6, p.191]

It is obvious from the above figure that nautical tourism is a highly active tourist activity. It is becoming a mass phenomenon, since it allows individuals a great deal of independence in choosing a preferred service, and also allows larger scope of movement leading to more consumption. Service providers in nautical tourism report better

economic results every year, thus contributing to the improvement of infrastructure. The negative side of this type of tourism is that it is largely seasonal.

Most authors agree that nautical tourism is a form of travel that takes place on or near the water, using rented or owned vessels for the purpose of fun or recreation. Some suggest that this industry is very broad, since it covers other activities such as diving, surfing, sale and rental of vessels and other service activities, in addition to navigation. However, it remains one of the most elite forms of tourism, since the costs associated with this type of vacation are quite high.

Cruise ships were the first large vessels purpose built for vacation and relaxation rather than commerce and freight. Over the years, this type of travel has become an integrated experience offering visits to various places for fun and recreation in relatively short periods. Some definitions for cruises are listed below:

- A cruise is a vacation on a vessel. [14, p.3]
- Cruises take place on all kinds of vessels, particularly yachts, sailing boats or motorboats. These days, cruises are defined primarily as sailing to tourism-related destinations on large, luxurious ships that can accommodate over 3,000 passengers. [9, p.11]
- Cruises are journeys by sea on board a vessel for the purpose of entertainment, usually with stops at several ports. [3, p.3]
- Cruises are a luxurious form of travel, which include all-inclusive vacations on a cruise ship for at least 48 hours with a specific itinerary where the passenger ship visits (different) ports or places. [18, p.3]
- Cruises are longer sailing journeys, according to the sailing direction, purposefully and frequently revised. [16]
- Cruises are sailing by sea or inland waterways along a predetermined path. The purpose of the cruise is for entertainment, sports, education, and visiting specific destinations. [15, p.3]

All authors agree that a cruise means travelling by boat over the sea, with a long journey on a specific route, and, in that time guests get to visit many destinations for the purpose of entertainment, relaxation, sport and new experiences. Cruise ships provide passengers with accommodation, entertainment and recreation. Passengers are provided with comprehensive and sophisticated services.

3. Development of nautical tourism in Slovenia

Nautical tourism in Slovenia started to develop in the 1960s. During that period, tourism in coastal towns developed rapidly, and also the branch of nautical tourism. The first marina in Slovenia opened in 1970 at Marina Portorož. The improved tourism infrastructure subsequently attracted other visitors. This development was followed by the opening of Marina Koper in 1990, and a marina at Izola in 1994. Marina Koper had been operational since 1980, but its operations were still in their infancy. [7]

From those early beginnings to date, Slovenian nautical tourism has developed rapidly. In 2015, the greatest number of nautical guests were Italians, Austrians, Germans and Slovenians. There were also guests from Croatia. Croatia provides the greatest competition to Slovenian marinas because the country has more sea and coastline and therefore also greater opportunities for development of nautical tourism.

Cruises are the industry of nautical tourism, which is in Slovenia the largest emerging economy. The start of this form of nautical tourism dates from 2005. It has had a major impact on the economy and the local population. The effects of cruise tourism are best seen from an economic point of view, in terms of impact on the environment and in terms of impact on the social environment.

The impact of cruises has been well described in a study of the economic effects of the Koper passenger terminal: "When one must assess what impact the cruise industry has on an area, and one must also assess tourism-based consumption, one must be aware that consumption is the result of tourist behaviour, and there are different categories of tourists. This is especially true at the Port of Koper, which offers a wide range of tours, not only in regards to the location, but also the mix of tour possibilities. These can be for excursions around Koper as well as for trips to a variety of Slovenian destinations in different arrangements. Slovenia has been able to capitalise on its particular natural beauty and is attractive to both European and international tourists. The decision to promote itself as a green country, was seen not only as a logical, but also as a winning proposition: over two-thirds of Slovenian territory is protected, comprising over eight thousand caves; in a compact area offering coast and mountains, as well as numerous thermal springs with highly-developed wellness tourism. Since the introduction of (cruise) shipping to Koper, it has been an economic centre for visitors to Slovenian Istria offering (many) different options: city centre tours, Regional Museum, the Praetorian Palace and Loggia, and streets around Tito Square capturing within them the memory of the Venetian period." [19, p.6-7]

With the arrival of cruise liners to Koper, visits to the city increased, thereby increasing the use of other services in the town, with an increase in tour sales and sightseeing tickets. Increases in visits to local restaurants and souvenir outlets were also recorded. Cruise ship guests to the Slovenian coast are predominantly one-day visitors, and as a result more relevant offers would be suitable. Most (day) trips offered by agencies to cruise passengers are organized in the surrounding villages, in the immediate vicinity of the port. All this contributes to the spread of good reputation and promotion of the Slovenian coast and its surroundings. In addition to these obvious effects, increased employment for trained staff during the tourist high season has also been observed. With the arrival of cruise ships Koper has gained much, in terms of visibility and promotion as the destination.

4. Analysis of nautical tourism and cruises in Slovenia 2005-2015

In this section, we analyse nautical tourism in all three Slovenian marinas. We focus on the information available, particularly on the number of occupied berths, type of vessel and the flag it carries. In the second part, we analyse cruises in the same way. We focus on the number of incoming cruise ships and the number of passengers carried. For cruising figures, data is analysed from 2007 onwards.

4.1. Analysis of nautical tourism

As stated earlier, there are three marinas in Slovenia. First, we analyse Marina Portorož [4]. The data available for analysis is the number of permanent vessels and the number of transient vessels in the marina. Data representing vessels at sea, or on land, and in shipyards are for the period from 2005 to 2015.

Table 1: Analysis of the number of vessels at Marina Portorož 2005-2015

YEAR	NO. OF BOATS	INDEX
2005	3099	100
2006	3079	99
2007	3248	105
2008	3553	115
2009	3863	125
2010	3385	109
2011	2748	89
2012	2892	93
2013	2247	73
2014	2199	71
2015	2149	69

Source: Author analysis based on data from Marina Portorož

In 2005, Marina Portorož recorded 3099 vessels and 2149 in 2015, representing a drop by 31 index points. A closer look at Table 1 shows that until 2009 vessel numbers were growing, and then began to fall. In 2010, there was a recorded growth by 9 index points compared to the base year, followed by a significant drop in the following year. This can be attributed to the decline in purchasing power due to the impact of the financial crisis, which, in Slovenia, was at its worst in 2010.

Table 2: Analysis by type of vessel at Marina Portorož 2005-2015

YEAR	MOTOR BOATS	INDEX	SAILING BOATS	INDEX	OTHER	INDEX
2005	1423	100	1419	100	257	100
2006	1380	97	1463	103	236	92
2007	1457	102	1508	106	283	110
2008	1621	114	1568	104	364	142
2009	1577	111	1840	130	446	174
2010	1440	101	1539	108	406	158
2011	1107	78	1461	103	180	70
2012	1122	79	1492	105	278	108
2013	809	57	1216	86	222	86
2014	756	53	1203	85	240	93
2015	802	56	1124	79	223	87

Source: Author analysis based on data from Marina Portorož

Table 2 shows that 1423 motorboats were moored at Marina Portorož in 2005, and only 802 in 2015. This represents a drop by 44 index points in the number of motorboats moored. Table 2 also shows noticeable decline in the number of motor boats of less than 3 index points in 2006, with increases against the base year in 2010. There was a significant decline in the number of motorboats after 2010.

Table 2 shows boat data for Marina Portorož in 2005, with 1419 sailing boats, and 1124 in 2015, representing a drop in the number of boats by 21 index points. For 2005, 257 other vessels are recorded for Marina Portorož, against 223 in 2015, which represents a drop in the number of other vessels by 13 index points.

Marina Portorož recorded the most sailing boats. After 2012, this showed a noticeable decline in the number of all types of vessels, with the largest decline being motorboats. This can be attributed to both the decline in purchasing power, and due to other marinas in the Adriatic offering lower prices.

Table 3: Analysis of vessel flag at Marina Portorož 2005-2015

YEAR	SLO- VENIA	IN- DEX	ITALY	IN- DEX	AU- STRIA	IN- DEX	GER- MANY	IN- DEX	OTHERS	IN- DEX
2005	938	100	835	100	359	100	605	100	362	100
2006	1018	109	871	104	336	94	532	88	322	89
2007	1173	125	964	115	306	85	465	77	340	94

YEAR	SLO- VENIA	IN- DEX	ITALY	IN- DEX	AU- STRIA	IN- DEX	GER- MANY	IN- DEX	OTHERS	IN- DEX
2008	1285	137	1079	129	316	88	437	72	436	120
2009	1496	159	1130	135	395	110	447	74	395	109
2010	1145	122	1090	131	347	97	468	77	335	93
2011	562	60	1292	155	213	59	339	56	342	94
2012	766	82	1120	134	289	81	382	63	335	93
2013	603	64	814	97	180	50	289	48	361	100
2014	572	61	791	95	190	53	265	44	381	105
2015	511	54	773	93	150	42	274	45	441	122

Source: Author analysis based on data from Marina Portorož

From Table 3 it is evident that the greatest decline in the number of flags addressed vessels from Slovenia, Germany and Austria. The reasons for these results could be (linked to) the price rises in marina services, resulting in owners moving their vessels to marinas offering more favourable terms. There is an interesting atypical result for Italian and others flag carrying vessels.

Marina Izola is analysed in the following section [23]. The data analysed is for permanent moorings at sea and on land for the period 2005 to 2015.

Table 4: Analysis of the number of boats at Marina Izola 2005-2015

YEAR	NO. OF BOATS	INDEX
2005	835	100
2006	898	108
2007	893	107
2008	902	108
2009	840	101
2010	787	94
2011	749	90
2012	727	87
2013	728	87
2014	638	76
2015	525	63

Source: Author analysis based on data from Marina Izola

Marina Izola recorded 835 vessels in 2005 and 525 vessels in 2015, representing a fall in the number of vessels by more than 37 index points. A closer look at Table 4 shows that the number of boats at Marina Izola was growing until 2008 and then started to decrease. In 2009, we see a “significant drop in index point growth”, but after that the number of vessels decreases less quickly. The most obvious drop in the number of boats at Marina Izola is from 2010 to 2015. From the analysis, it can be assumed that the reasons for the decline in the number of moorings are similar to those at Marina Portorož, since the decline is observed beyond 2010.

Table 5: Analysis by type of boat at Marina Izola 2005-2015

YEAR	MOTOR-BOATS	INDEX	SAILING BOATS	INDEX	OTHERS	INDEX
2005	373	100	440	100	22	100
2006	404	108	467	106	27	123
2007	388	104	463	105	42	191
2008	403	108	474	108	25	114
2009	378	101	439	100	23	105
2010	349	94	425	97	13	59
2011	322	86	416	95	11	50
2012	320	86	398	90	9	41
2013	330	88	387	88	11	50
2014	284	76	343	78	11	50
2015	203	54	305	69	17	77

Source: Author analysis based on data from Marina Izola

Analysis of the data in Table 5 shows that there were 373 motorboats at Marina Izola in 2005 and 203 motorboats in 2015. This represents a drop in the number of motorboats moored at Marina Izola by more than 45 index points. The data in Table 5 also shows 440 sailboats at Marina Izola in 2005, with 305 in 2015, a decline by more than 31 index points in the number of boats. Marina Izola recorded 22 other vessels in 2005 and 17 of the same category in 2015, which represents a drop in the number of other vessels by almost 23 index points.

Marina Izola is dominated by sailing boats. It can be concluded that a small decline in the number of sailing boats was recorded as early as 2009, but after 2010 the decline was observed in all types of vessels. The reason for this may be uncompetitive pricing, as well as the impact of the financial crisis.

Table 6: Analysis of vessel flag at Marina Izola 2005-2015

YEAR	SLO- VENIA	IN- DEX	ITALY	IN- DEX	AU- STRIA	IN- DEX	GER- MANY	IN- DEX	OTHERS	IN- DEX
2005	578	100	40	100	94	100	78	100	45	100
2006	645	112	44	110	84	89	74	95	51	133
2007	677	117	34	85	75	80	74	95	33	73
2008	691	120	43	108	71	76	61	78	36	80
2009	642	111	34	85	68	72	51	65	45	100
2010	596	103	30	75	57	61	63	81	41	91
2011	557	96	32	80	57	61	60	77	43	96
2012	511	88	49	123	58	62	59	76	50	111
2013	496	86	46	115	71	76	69	88	46	102
2014	423	73	42	105	65	69	56	72	52	116
2015	310	54	58	145	54	57	47	60	56	124

Source: Author analysis based on data from Marina Izola

From the analysis of the period 2005 to 2015, the greatest number of vessels at marina Izola carried the Slovenian flag. The number of vessels carrying the Slovenian flag began to decline sharply beyond 2010. The number of vessels carrying German and Austrian flags was dropping year on year as compared to the base year. For vessels with the Italian or other flags, the result is different. These vessels recorded a growth from 2012 to 2015. This seems to indicate that Marina Izola was a recommended supplier for the Italian market and vessels with other flags due to its comprehensive and affordable services.

Our analysis of Marina Koper completes the survey [12]. The data obtained and analysed is for permanent moorings at sea and on land for the period 2005 to 2015.

Table 7: Analysis of the number of vessels at Marina Koper from 2005 to 2015

YEAR	NO. OF BOATS	INDEX
2005	54	100
2006	58	107
2007	56	104
2008	55	102
2009	59	109
2010	56	104

YEAR	NO. OF BOATS	INDEX
2011	60	111
2012	56	104
2013	65	120
2014	71	131
2015	59	109

Source: Author analysis based on data from Marina Koper

Table 7 shows that 54 vessels were recorded at Marina Koper in 2005 and 59 in 2015, an increase in the number of vessels by 9 index points. The data analysed covers the number of permanent moorings. It can be concluded that Marina Koper was offering nautical tourists quality services with good price ratios and delivering long-term service advantages. Despite the small number of available berths, the spaces were well occupied over the assessed period.

Table 8: Analysis by type of boats at Marina Koper from 2005 to 2015

YEAR	MOTORBOATS	INDEX	SAILING BOATS	INDEX
2005	22	100	32	100
2006	26	118	32	100
2007	16	73	40	125
2008	17	77	38	119
2009	16	73	43	134
2010	30	136	26	81
2011	25	114	35	109
2012	28	127	28	88
2013	35	159	30	94
2014	46	209	25	78
2015	29	132	30	94

Source: Author analysis based on data from Marina Koper

At Marina Koper, numbers of vessels were also seen to increase. A fall in their number is observed after 2012. The likely reason for this is the drop in purchasing power. The observed increase in the number of motorboats after 2010 is interesting. The probable reason for this is better quality of service offer.

Table 9: Analysis of vessel flags at marina Koper 2005-2015

YEAR	SLO- VENIA	IN- DEX	ITALY	IN- DEX	AU- STRIA	IN- DEX	GER- MANY	IN- DEX	OTHERS	IN- DEX
2005	30	100	6	100	5	100	12	100	2	100
2006	29	97	8	133	6	120	13	108	2	100
2007	32	107	10	167	3	60	7	58	4	200
2008	27	90	9	150	7	140	9	75	3	150
2009	32	107	8	133	6	120	9	75	4	200
2010	34	113	6	100	5	100	8	67	3	150
2011	35	117	6	100	8	160	4	33	7	350
2012	28	93	7	117	3	60	6	50	12	600
2013	34	113	9	150	9	180	7	58	6	300
2014	52	173	4	67	6	120	6	50	2	100
2015	40	133	3	50	6	120	4	33	6	300

Source: Author analysis based on data from Marina Koper

From Table 9 it can be concluded that the largest decline in the number of vessels at Marina Koper was recorded in respect of those carrying German flags. Vessels carrying Slovenian, Italian and other flags were growing over that period. Further investigation into the needs of the German market is recommended in order to determine ways of attracting more guests.

If we compare the achievements of the three marinas, we find that the marinas at Portorož and Izola have observed a slight decline in the number of vessels after 2010. There can be many reasons for this. Primarily competition from marinas in Croatia and Italy. Another reason may be the consequences of financial crisis that placed many people in debt and, consequently, reduction in the living standard and in purchasing power. Marina Koper is the only location where the number of occupied berths has been growing since 2005 (onwards). The reason for this is most likely due to the marina offering the best possible service packages.

In the analysis by the type of vessels, we found that all three locations observed a larger number of sailboats and motorboats in the years following the base year. The number of sailboats and motorboats at Marina Koper has remained roughly about the same in recent years. For the studied period, all three marinas have greater numbers of berthed sailing boats in common. Numbers for other vessels have not been considered, as data from Marina Koper was not provided.

In our analysis of flags carried by vessels, we found that in all three locations the highest number carried the Slovenian flag. An observed decline in vessels carrying the Slovenian flag was reported only at Marina Portorož for the years after 2010, though

with an increase in vessels carrying the Italian flag. All three locations observed a drop in the numbers of vessels with Austrian and German flag with the year on year drop since the base year. With the dominant flag in all three marinas being Slovenian, we recommend further analysis of the needs of foreign visitors to thereby improve the current offer. It would make sense that the marinas channel their efforts into better sales service, and by offering competitive pricing and more varied marina-side offers. Progress is possible, but this will require market research and additional investments in infrastructure and in the adaptation of service offerings.

4.2. Position of Slovenia compared to other Mediterranean countries

The nautical sector has been fast growing in Europe, especially in the Mediterranean area. More than 48 million of European yachtsmen, alongside non-EU nautical tourists, enjoy the European coasts and waters. Recreational vessels in European waters are more than 6 million, across 4.500 marinas and 1.75 million moorings, according to the “CNA Research on Dynamics and Market Perspectives of the Nautical Industry of Yachting”.

In order to get a better insight into the position of Slovenian area important for nautical tourism development, it is necessary to compare Slovenia with other Mediterranean countries with developed nautical tourism, such as France, Greece, Italy, Croatia, Montenegro, Spain, and Turkey. It is very important to compare natural characteristics that enable nautical tourism development, such as coastline length, number of marinas, coastal share per domestic and international tourism.

Table 10: Selected indicators for the leading Mediterranean countries in the nautical tourism

Selected Mediterranean Countries	Area (sq. km)	Coastline length (km)	Number of Marinas	Distance (km)	Share Coastal / Total Domestic Tourism	Share Coastal / Total International Tourism
France	547 030	1 703	124	14	18%	20%
Greece	131 940	13 676	135	111	90%	95%
Italy	301 230	7 600	253	29	70%	65%
Slovenia	30 273	32	3	16	25%	25%
Turkey	780 580	5 191	37	140	40%	65%
Spain	504 782	2 580	191	14	40%	70%
Croatia	56 542	6 278	81	72	72%	93%
Montenegro	274	274	2	147	15%	10%

Source: [2, 5]

In Table 10 the coastal lengths of the Mediterranean countries are compared with each other by the number of marinas. The artificialisation of shallow marine habitats

depends directly on the spatial extensions of ports. The mean distance between ports in the Mediterranean is 79km on the average, down to 20 km in Spain, France and Slovenia. The number of marinas and the mean distance between them indirectly reflects part of the impact that recreational boating might have on coastal habitats and natural communities. With the total coastline length of 32 km Slovenia has the shortest coastline in the Mediterranean.

The future development of coastal tourism, cruise tourism and recreational boating in the Mediterranean Sea will depend on several factors including: promotion / communication; efforts towards potential clients; the degree of responsiveness to international demand; the innovativeness and the capacity to develop tourism activities during low season or external factors like the state of the global economy, the evolution of fuel prices and of consumers' preferences.

4.3. Analysis of cruise ships

In this section we focus on cruise ships. We analyse data on the number of incoming cruise ships in detail and the number of guests carried by them for the period from 2005 to 2015. We take 2007 as the base year for calculating the base indices since this was when larger numbers of cruise ships were recorded rather than 2005, where there is insufficient data on the growth dynamics. We also show the breakdown of the guests according to their age and nationality for 2014.

Table 11: Analysis of the number of incoming cruise ships and passenger numbers from 2005 to 2015

YEAR	NO. OF VESSELS	INDEX	NO. OF PASSENGERS	INDEX
2005	18	33	1100	5
2006	18	33	1800	8
2007	54	100	22580	100
2008	44	81	15246	67
2009	53	98	31021	137
2010	55	102	108820	482
2011	78	144	64455	285
2012	47	87	65439	290
2013	54	100	58974	261
2014	49	91	57893	256
2015	65	120	73000	323

Source: [19]

The initial data in Table 11 shows that 18 cruise ships arrived at the Port of Koper in 2005 and 65 in 2015, indicating arrivals growth at a staggering 87 index points. Looking more closely at Table 10, we see that the number of arrivals is of a pendulum-like nature.

We have found that ever since the opening in 2005 the passenger terminal in the Port of Koper has had a greater number of cruise ship arrivals each year. The reason for this is most likely the targeted and deliberate investment by Luka (Port of) Koper in their passenger terminal. (Another) reason could be the arrival of new shipping companies in Koper.

Also observed in Table 10 are numbers of passengers at the Port of Koper, which reported 1,100 passengers in 2005, and 73,000 in 2015, representing an increase by over 418 index points. We found that the number of passengers on the cruise ships grew greatly irrespective of the number of incoming cruise ships. This is due to the arrival of cruise ships with greater capacity at the Port of Koper. The work done by the Port Koper can be assessed as very positive, because their strategy has obviously been very successful. The Port of Koper continues to invest in the development of its infrastructure and passenger terminal and this will certainly pay off. It is also recommended to connect to the new shipping line operators, promoting and advertising Koper as an attractive and interesting destination for a wide range of visitors.

5. Concluding opinions

Our analysis shows that nautical tourism in Slovenia showed a slight decrease in the last few years, with the exception of cruise ships. As previously stated, the most obvious reason is the economic crisis and the resulting fall in purchasing power. Since this industry is largely seasonal in nature and is conditional, among other things, upon weather conditions, this may be the reason for poor results in some years due to poor weather in the high season. Another reason for the drop in the number of vessels in all three locations in 2010 may be that from 2010 onward the Statistical Office of Slovenia no longer required data on occupancy and vessel's type and flag. Such an approach demonstrates lack of interest at the national level for the status of nautical tourism.

Another indicator of how local nautical tourism is treated is the lack of research in this area, either at the national or local level. The majority of researches on nautical tourism is classified with other activities so that only indicative results can be presented. Other types of tourism, such as catering or health tourism have been the subject of more literature and research. For the period prior to 2012, hardly any information on nautical tourism in Slovenia is available, while in Croatia and other maritime nations, more research work and many different studies have been undertaken. We hope for additional researches in the coming years, since in this way we can obtain relevant information to assist in (developing) successful marketing and competitive nautical tourism offers.

In the case of cruise ships, the situation is slightly different. Since 2005, when the Port of Koper passenger terminal first opened, the Slovenian industry has emerged well. All indications are that the numbers of cruise ships stopping at Koper will continue to grow. The strategy, set by the Port of Koper itself in cooperation with the Municipality of Koper, has obviously been successful. There is considerable domestic literature and research covering cruise ship travel. Most of the research is local, but some has also been found at the national level. Through this research we can follow the development of this type of nautical tourism, which has emerged in recent years and offers great opportunities for further development.

While it is possible for each destination to see significant business opportunities in cruise ships, local communities and businesses do not yet know how to better market their marina offers.

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Analiza nautičkog i kruzing turizma u Republici Sloveniji (2005. – 2015.) i njihov položaj u odnosu na druge mediteranske zemlje

Sažetak

Ovaj članak posvećen je predstavljanju nautičkog turizma u Sloveniji. Osnovna svrha je procijeniti opseg nautičkog turizma budući da u Sloveniji nedostaju podaci o ovoj vrsti turizma. Slovenija ima tri marine, nekoliko vezova i putničkog terminala. Unatoč malom obalnom pojasu (46 km), svi oblici nautičkog turizma su zastupljeni. Ovaj članak sastoji se od teorijskog i analitičkog dijela. Teoretski dio predstavlja niz osnovnih definicija koje se odnose na nautički turizam i putovanja. Ovim radom predstaviti će se dosadašnji razvoj ovog oblika turizma u Sloveniji. Prva marina u Sloveniji izgrađena je 1979. godine u Portorožu, a cruising turizam u Sloveniji započinje nešto kasnije, 2005. godine. Zbog svojih raznolikosti u malom prostoru, Slovenija je idealna polazna točka za (pomorske) izlete. U analitičkom dijelu, analizirani su numerički podaci o prometu marine i luke Kopar za razdoblje od 2005. do 2015. godine. Ovaj rad temelji se na podacima prikupljenim od samih marinama, budući da službena statistika o nautičkom turizmu ne postoji. Glavni rezultati analize pokazuju da je nautički turizam u Sloveniji doživljava veliki pad od 2005. godine. Izuzetak čini cruising turizam koji bilježi snažan rast.

Ključne riječi: nautički turizam, kruzing, Slovenija, marine, Kopar, Portorož, Izola

