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## **Analysis of River Cruising with the main focus on Croatia**

### **Abstract**

The topic of this paper concerns the analysis of river cruising in Europe and Croatia in order to explain problems affecting this kind of tourist product. There are a lot of possibilities to use rivers to complete the whole tourist experience, which is a top priority for the Croatian budget. This paper analyzes the current state of river cruising in Croatia, the types of ships used, the different types of users, the main reason for the poor state of river cruising in Croatia, and possible solutions Croatia can introduce in order to revitalize river cruising.

**Keywords:** river cruising, the Danube river, river tourism

### **1. Introduction**

Tourists today choose shorter stays at destinations and look for new kinds of tourist products and experience. The main reason for analyzing this topic is that there are a lot of possibilities and opportunities in this kind of tourist aspect, which are insufficiently exploited. This paper is based on the analysis of river cruising in Croatia, focusing also on the main cruise rivers in Europe because of their connection with Croatian rivers. In the last few years, there has been some progress in the number of ships arriving at Croatian river ports, especially in Vukovar. The growth could be even faster, but there are some other problems concerning this kind of business, and they are also included here. In addition, this paper brings the analysis of the types of ships sailing on rivers,

the tendency in the growth of average river cruise ships, types of average passengers, their residence, their satisfaction with the destination and cruise, and their average expenditure in Croatian river ports. This paper aims to explain the main problems facing river cruising in Croatia and to give a fresh view upon who river cruise customers are and what they expect.

## 2. River cruise and main cruise rivers in Europe

River cruise is quite a new tourist branch and has the possibilities for a quick growth in classic global tourist services. Multiple-day river cruises have been flourishing since the beginning of this century as a response to the swift rise of sea cruises. Its main features are accommodation on board, a variety of restaurants, bars and commercial services, entertainment, leisure, recreation, sightseeing around different towns and exploring their culture. Some of the characteristics are:

- there are two types of infrastructure demands for the river cruise industry – tourist and operational demands. Tourist demands are: pier / quay close to the city center and easy accessibility to buses and taxis, while operational demands are: waste reception facilities, sewage handling facilities, shore-side power supply, accessibility, fresh water and bunker supply [6];
- the average river cruise ship built in 1996 had a width of only 11m, draft around 1.5m and length around 110m (capacity of 140 passengers), while today ships are 135m long, 17m wide and have a capacity of 220 passenger [5];
- the importance of river cruises can be found in 12,000 direct jobs onboard, 10,000 jobs involved outside vessels, € 1.1 bn. new building investment within two years, € 1.3 bn. passenger expenditure and € 0.5 bn. shore side expenditure in Europe according to the Central Commission for the Navigation of the Rhine [6];
- the biggest river cruise region is Europe, whereas the country with the most developed river transport is Germany (the Rhine, Main, and Danube rivers). According to the German Travel Agents Council, the average tourist on a river cruise ship is 57 years old and is inclined towards themed cruises, highlighting topics such as golf, music, art, cooking and wellness. Citizens of Germany, France and Great Britain show the greatest demand for river cruising in Europe [4];
- the average price for river cruises in Germany in 2007 was € 1,180, while in 2015 it was € 1,027, which shows a price dropping trend in river cruises [7];
- operators in Europe have different routes and offers, so tourists can choose between one-day short river cruise or just dinner cruise, and a one week cruise in down, middle or upper part of the Danube river. The lower part of the Danube river usually starts in Budapest (Hungary) including Croatia, Serbia, Bulgaria and ending at the Black Sea in Romania;

- the average number of days spent on river cruises in Germany was 7.2 days in 2015, whereas in 2007 it was 7.76 which means a shortening trend in the duration of river cruising by 0.7% yearly [7].

These characteristics reveal that river cruising has been growing in Europe and the following topic brings the analysis of river cruises in Croatia.

### 3. Analysis of river cruises in Croatia

Croatia has just a few navigable rivers. The biggest is the Danube, followed by the Drava, Sava and Kupa. Their ports are Vukovar, Ilok, Osijek, Aljmaš, Batina and Sisak. (1) All these ports are located in a relatively small area, yet with a big potential owing to the developed cultural and historical hinterland and natural attractions. Some of the destinations that can be visited by cruising the Croatian rivers are Eastern Slavonia, Baranja, Posavina, Moslavina... All these places are definitely underestimated and they need this kind of tourism to show their natural attractiveness (e.g. Nature Park Kopački rit) and offer. The opportunity for increasing tourist visits to these places should be sought in the rise of the demand within the European Union and in the increasing demand for authentic destinations.

The biggest disadvantages of river cruising in Croatia are: seasonal fluctuation of water levels, underutilization of European development funds, insufficient cooperation of participants in the system, and poor promotion. [1]

Unfortunately, the Croatian government has not recognized the importance of this kind of tourist product and it is not even mentioned in their strategic documents that should determine the direction and development of river tourism. These documents are:

- the River Transport Development Strategy in the Republic of Croatia (2008-2018) adopted by the Croatian Parliament (nautical tourism is not mentioned at all)
- the Medium-term development of inland waterways and inland ports of the Republic of Croatia (2009-2016) - listing the number of passengers and cruise tourism, but not providing any detailed guidance for their development; missing the new mid-term plan for the period beyond 2016
- the Strategy for Transport Development of the Republic of Croatia (2014-2030) - not mentioning either one-day or multi-day river cruises, or nautical tourism on rivers at all.

Regardless of the lack of concern for river cruising, and for river tourism in general, by the state bodies, river cruising in Croatia recorded an average annual growth in passengers in the past 5 years by 32%, as shown in figure 1, and an average annual growth in cruise port calls in the past 5 years by 33%, as shown in figure 2.

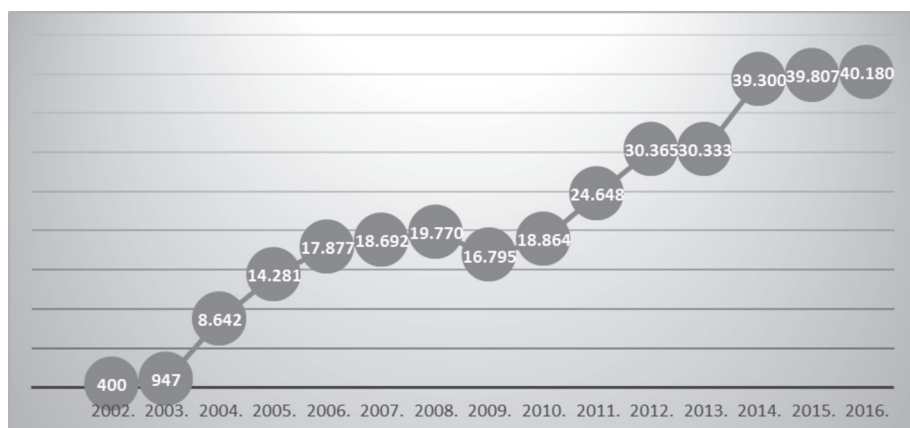


Figure 1 - Passengers in Croatian river ports (Data sources: the Ministry of the Sea, Transport and Infrastructure and Port Authority Osijek)

According to the data displayed in Figure 1, the number of passengers has grown from 400 in 2002 to 40,180 in 2016, which means a growth by 10048% in only 14 years, and it has the potential to continue growing.



Figure 2 - Cruise port calls in Croatian river ports (Data sources: the Ministry of the Sea, Transport and Infrastructure and Port Authority Osijek)

Figure 2 shows similar results as Figure 1, yet it refers to cruise port calls in Croatian river ports. As shown, there were only 2 river cruisers in 2002, and in 2016 there were 330 of them in Croatian river ports, which means a growth exceeding 16500%, with the potential for further growth as well.

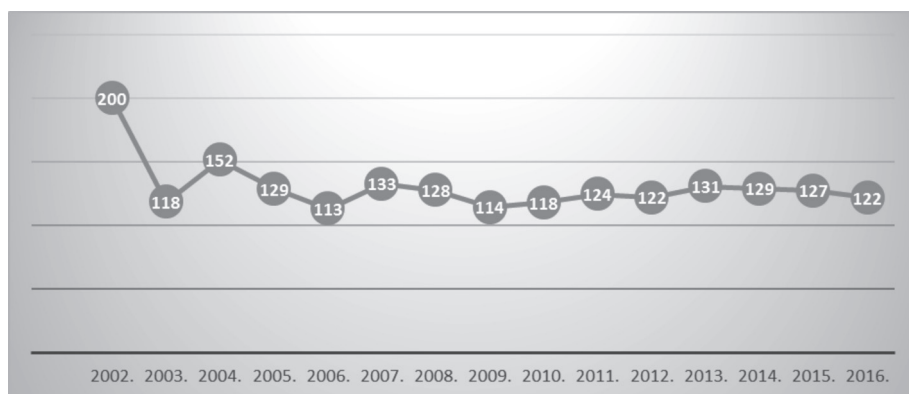


Figure 3 – Number of passengers per ship (Data sources: the Ministry of the Sea, Transport and Infrastructure and Port Authority Osijek)

As displayed in Figure 3, there were in 2002 (the start of river cruise in Croatia) 200 passengers per ship, and a few years later, in 2005, only 129. After 2005, there were no significant differences in the number of passengers per ship, and this drop can be related to the arrival of more luxurious ships with larger rooms, and a wider range of themed facilities.

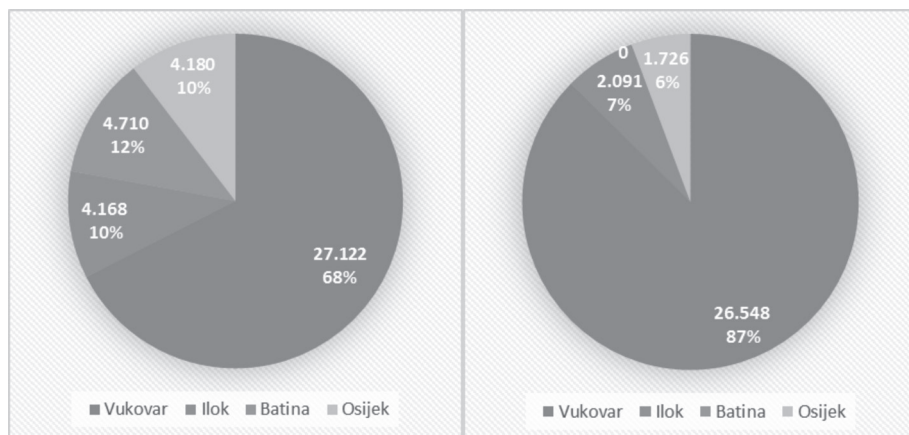


Figure 4 – Proportion of passengers in Croatian river ports, 2016 (left) and 2012 (right) (Data sources: the Ministry of the Sea, Transport and Infrastructure and Port Authority Osijek)

According to Figure 4, most passengers from river cruisers in 2016 were in the port of Vukovar (68%), Batina (12%), Osijek (10%), and Ilok (10%), which makes Vukovar the leading port and city of river cruising in Croatia. In 2012, Vukovar had a

share of 87%, Osijek 6 %, Ilok 7% and Batina did not have any passengers from any river cruise ship, which leads to the conclusion that Vukovar has been losing share, and other ports are recording faster growth.

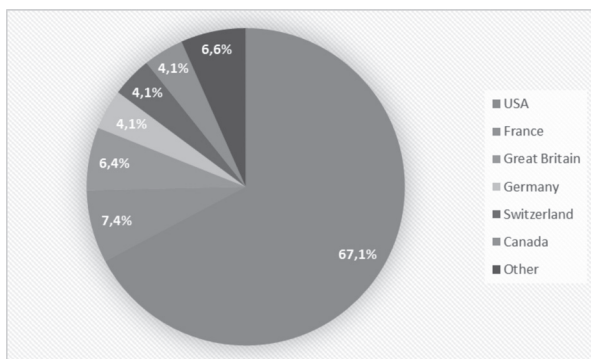


Figure 5 – Demand for river cruising in Croatia (Riječna krstarenja u Hrvatskoj, 2014)

One interesting fact is shown in Figure 5 - the biggest demand for river cruises in Croatia comes from the USA (67.1%). It is probably attributable to the habits of passengers coming from that area and to big offer of river cruising on their continent. Passengers from the USA are followed by those from France, Great Britain and Germany.

The Croatian Ministry of Tourism has made an analysis of river cruise passengers’ and crews’ satisfaction with their stay in Croatia, and the results are shown in Table 1.

Table 1 - Satisfaction survey of passengers on river cruise ships in Croatia (Riječna krstarenja u Hrvatskoj, 2014)

Elements of supply	Passengers	Crew
expertise and language skills of tourist guides	☺	☺
kindness of staff in restaurants, shops, tourist information centers	☺	☺
hospitality of local residents	☺	☺
gastronomy	☺	☺
organized excursions	☺	☺
personal security	☺	☺
organization of sightseeing	☺	☺
overall experience of the destination	☺	☺
orderliness (cleanliness, green and public areas)	:/	:/
quality of tourist signs	:/	:/
availability of tourist brochures	☹	:/
shopping	☹	☹
souvenirs	☹	☹

According to Table 1, passengers and crews are satisfied with the hospitality, organization and gastronomy; however, they have a few objections to the cleanliness and quality of tourist signalization. As the biggest problem, they see unavailability of tourist brochures, shopping (small number of duty free shops, hand-made stands, shopping centers...), and small number of souvenirs, except “made in China” souvenirs. In conclusion, local residents and local businesses are working very well; however, local governments and tourist boards are not, because tourists perceive cities as “half dirty” and without sufficient tourist signs.

Passengers mostly buy souvenirs, drinks and local products, while ship crews buy cosmetics instead of souvenirs. The average amount spent is 11 Euros per passenger during their stay ashore, while the average amount spent by crew is 24 Euros pp. To increase the spending, the offer of souvenirs and local products needs to be improved. [1]

#### 4. Conclusion

In conclusion, river cruising has a great potential, but it requires hard work of all entities involved. If properly operated, the river cruise industry can boost tourism of every country. Everyone, from a small agricultural business to a tourist agency and the government, can benefit from it. Mostly, it is older and wealthier people who buy river cruise arrangements and they spend considerable amounts of money in river ports and cities if they can find places where to spend it.

In Croatia, the river cruise business started around 2002 and ever since it has been recording large growth rates every year, despite the fact that the government has not recognized it as a strategic point of interest. If the government, local authorities and local tourist boards start giving this topic more serious consideration and investing in the promotion of this kind of business, it will probably flourish in a couple of years. There is also enough space for introducing one-day or just dinner cruises on Croatian rivers and one-day trips from cruise ports to inland destinations. The Danube has a great potential but Croatia should also think about developing cruises on other rivers. This would become possible with the construction of the Sava-Drava-Danube canal which would make it navigable along almost its entire length.

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## **Analiza riječnog kružinga s posebnim naglaskom na Hrvatsku**

### **Sažetak**

Tema ovoga članka je analiza riječnog kružinga u Europi i Hrvatskoj u svrhu razumijevanja problema ove vrste turističkog proizvoda. Postoji veliki broj mogućnosti korištenja rijeka kako bi se upotpunilo cjelokupno turističko iskustvo, koje je jedno od prioriteta Hrvatskog državnog proračuna. Ovaj članak analizira trenutno stanje riječnog kružinga u Hrvatskoj, koje se vrste kružera koriste, tko su korisnici (turisti), koji su glavni razlozi za loše stanje riječnog kružinga u Hrvatskoj te što Hrvatska može učiniti za revitalizaciju riječnog kružinga.

**Ključne riječi:** krstarenje rijekama, rijeka Dunav, riječni turizam