

# NAUTICAL TOURISM IN CROATIA

Vlasta Roška<sup>1</sup>

Sara Soldo<sup>2</sup>

Karlo Osmanović<sup>3</sup>

**Abstract:** Nautical tourism has become a vital contributor to Croatia's economy, driven by the country's extensive maritime resources, strategic location, and well-developed infrastructure. This study investigates the core elements of Croatia's nautical tourism sector, focusing on infrastructure capacities, port revenues, and the economic influence on connected industries. Methodologically, the research combines quantitative analysis of revenue data and comparative assessments of Croatian and Italian nautical tourism sectors to evaluate competitive positioning within the Mediterranean market. Results highlight Croatia's reliance on specialized services, particularly berth rentals, as a primary revenue source, while Italy's nautical sector benefits from a more diversified revenue base. Despite strong growth, Croatia faces challenges related to environmental sustainability, emphasizing the need for policies that support green investments and eco-friendly practices. The findings suggest that strategic investments in infrastructure and adherence to sustainable development policies could bolster Croatia's position as a premier nautical destination. This paper underscores the importance of balancing economic growth with environmental preservation to sustain Croatia's maritime appeal for future generations.

**Key words:** Nautical Tourism, Economic Impact, Sustainable Development

<sup>1</sup>Libertas International University, Trg J.F: Kennedy 6b, Zagreb, CROATIA), vroska@libertas.hr

<sup>2</sup>Libertas International University, Trg J.F: Kennedy 6b, Zagreb, CROATIA), ssoldo1@libertas.hr

<sup>3</sup>Student at Libertas International University, Trg J.F: Kennedy 6b, Zagreb, CROATIA)

## 1. INTRODUCTION

Nautical tourism in Croatia has evolved into a dynamic sector, blending leisure, transport, and culture, and significantly shaping the nation's economy. With over a thousand islands, a mild climate, and crystal-clear waters, Croatia has become one of the leading nautical destinations in the Mediterranean.

Nautical tourism represents a significant segment of Croatia's tourism industry, attracting both local and international visitors. Situated along the eastern Adriatic coast, Croatia stands out for its remarkable shoreline, pristine sea, and over a thousand islands and islets, making it a premier destination for nautical enthusiasts. The Croatian coastline stretches over 6,000 kilometers and includes more than 1,000 islands, creating a haven for visitors seeking nautical adventures (Šamanović, 2002). This diverse landscape enables a wide range of activities, such as yachting, sailing, diving, fishing, and exploring historical and natural landmarks along the coast.

The development of nautical tourism in Croatia is further supported by a well-established network of marinas and ports, offering all necessary amenities and services for sailors. Croatian marinas provide safe mooring, high-quality services, modern facilities, and access to numerous attractions. Beyond natural beauty, Croatia's rich cultural and historical heritage draws nautical tourists, with historical city centers, forts, churches, and national parks offering unique experiences for those wanting to explore inland. Nautical tourism has a substantial economic impact in Croatia, creating jobs, stimulating local spending, and contributing to regional development. The growing number of tourists drawn by nautical activities has diversified Croatia's tourism offerings and extended the tourist season.

This paper investigates the structural and economic aspects of Croatia's nautical sector, including marina capacities, infrastructure, port revenues, and the economic impact on related industries. Furthermore, the study highlights the sector's challenges, such as environmental concerns and the need for sustainable practices, as Croatia balances growth with preservation of its natural resources. By examining these factors, the paper aims to provide a well-rounded understanding of the economic, environmental, and strategic dimensions of nautical tourism in Croatia.

## 2. THEORETICAL RESEARCH

### 2.1. Definition

Nautical tourism is a specific form of tourism closely connected to water navigation, making it unique in its characteristics. Over the past twenty years, it has seen a significant rise and is increasingly regarded as a luxurious, selective form of tourism

aimed at tourists with high economic capacity. This trend emphasizes individuality and personalization of experiences, catering to the specific needs of each tourist. The word ‘nautical’ originates from the Greek word ‘nautas,’ which literally means sailor. In the context of nautical tourism, the term signifies the science of seafaring, according to Šamanović (2002).

The most precise definition of nautical tourism was provided by the author Dulčić, who links this selective form with both tourism and nautical activities, thus creating a new concept—nautical tourism (Dulčić, 2002). Several authors have contributed to the understanding of this form of tourism:

A general definition, available from many online sources, describes nautical tourism as a selective form of tourism that meets tourists’ needs for water-based navigation. According to Luković (2007), nautical tourism encompasses a wide range of activities and interactions arising from the stay of nautical tourists within or outside nautical ports, including the use of vessels and other infrastructure related to nautical tourism. Vukonić and Čavlek (2001) define nautical tourism as a distinct form of tourism characterized by the navigation and residence of tourists on their own or rented vessels.

Nautical tourism provides specific tourism services that differ from typical tourism offerings, as noted by Šamanović (2002). These services include the rental of berths along protected coasts, rental of vessels for leisure and recreation, skipper services, reception, care, and maintenance of vessels at sea moorings, supply of energy sources (electricity, gas, water, fuel), preparation and maintenance of vessels, and the provision of various information to sailors, such as weather forecasts and schedules.

## 2.2. Infrastructure

Today, nautical tourism in Croatia is governed by a robust regulatory framework, including the Law on Tourism Activities (NN 18/96) and the Law on the Provision of Tourism Services (NN 152/14). However, a specific law targeting all aspects of nautical tourism has yet to be established. The existing law governs the navigation and stay of tourists in nautical tourism destinations, focusing on their leisure and meeting specific tourism needs.

Modern nautical tourism in Croatia began with the development of nautical infrastructure in the 1960s, which significantly contributed to its growth. According to Bartoluci and Čavlek (2007), this period saw the construction of four nautical marinas with a total of 150 berths, accommodating 1,500 foreign yachts and sailboats. This initiative was driven by the arrival of foreign nautical tourists seeking recreational activities in Croatian ports that lacked adequate nautical infrastructure at the time. This

development marked the start of a purposeful growth of nautical tourism in Croatia, which today holds a prominent position as a strong niche in the country's tourism market.

In addition to marina development, a key milestone was the contract for building, storing, and maintaining boats at the Punat shipyard, marking the beginning of one of Croatia's largest marinas today. Furthermore, in 1963, the Adriatic Croatia International Club (ACI) was established, which continues to operate and manages a series of marinas along the Adriatic coast (Bartoluci and Čavlek, 2007). ACI currently manages 21 marinas, offering an attractive array of services for nautical tourists. These marinas are equipped with top-notch nautical infrastructure, providing high-quality services to incoming tourists at affordable rates.

According to Bartoluci and Čavlek (2007), the importance of nautical tourism development in Croatia is evident through several characteristics: strong recognition and competitive positioning in the global tourism market compared to other niche tourism sectors, a higher average expenditure by nautical tourists compared to other visitors, and increased property values near marinas. These characteristics make nautical tourism an appealing and economically significant segment within Croatia's tourism industry.

Nautical tourism in Croatia experienced substantial progress after the establishment of the Croatian Marina Association in 1991 and the Nautical Tourism Association in 1994. These associations were founded to address challenges faced by marinas and to promote nautical tourism within Croatia. Today, nautical tourism in Croatia is governed by a robust regulatory framework, including the Law on Tourism Activities (NN 18/96) and the Law on the Provision of Tourism Services (NN 152/14). Over the past 15 years, nautical tourism has grown significantly and is now recognized as an essential niche within Croatian tourism, as the country aligns itself with European tourism trends.

The nautical tourism infrastructure of Croatia plays a key role in attracting seafarers from around the world. With its coastline stretching along the Adriatic Sea and encompassing over 1,000 islands, Croatia offers a diverse nautical infrastructure that meets the needs of various types of vessels and tourists (Krce Miočić, 2014). The main elements of Croatia's nautical tourism infrastructure are as follows (HTZ, 2019; Luković & Bilić, 2007; DZS, 2023; Križman-Pavlović, 2008):

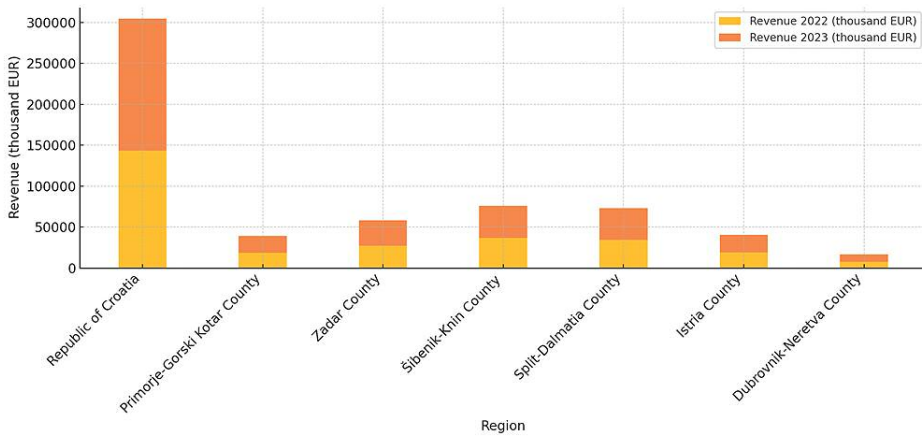
- **Marinas and Ports:** Croatia has over 50 marinas distributed along the coastline and islands. These marinas offer a wide range of services, including moorings for vessels of all sizes, from small boats to large yachts. Marinas are equipped with modern facilities for accommodating vessels, such as electricity, water, internet, and sanitary facilities, and are often connected to restaurants, shops, boat services, and other amenities needed by seafarers.

- **Breakwaters and Anchorages:** In addition to marinas, Croatia has numerous smaller ports, breakwaters, and anchorages suitable for smaller vessels or those who prefer quieter coves and hidden locations. These anchorages often provide basic services such as mooring and access to the mainland, making them ideal for exploring the coastline and islands.
- **Boat Services:** Along the Croatian coast are service workshops and shipyards that offer maintenance, repair, and modification services for vessels. These services are crucial for ensuring the safety and functionality of vessels during their stay in Croatia.
- **Navigation Services:** Croatia has a well-developed navigation infrastructure, including navigation markers, lighthouses, buoys, and electronic navigation systems. These elements are essential for safe navigation along the coast and between islands, especially during night sailing or adverse weather conditions.
- **Tourism Amenities:** In addition to vessel infrastructure, Croatia offers a variety of tourist amenities tailored for nautical tourists. These include various water activities like diving, sailing, fishing, and opportunities to visit national parks often located close to the coast.
- **Legal Framework:** The legal framework for nautical tourism in Croatia is regulated by the Maritime Domain and Seaports Act, the Tourism Activities Act, and other relevant regulations that govern the provision of nautical tourism services, environmental protection, and navigation safety.
- **Promotion and Development:** Croatia continuously invests in the development of its nautical infrastructure to meet the growing demand for nautical tourism. Investments in new marinas, the modernization of existing facilities, and the promotion of nautical offerings are key to strengthening Croatia's position as a leading nautical destination.

### 2.3. Port revenue

Nautical tourism in Croatia shows dynamic growth and varying revenue trends across different counties, reflecting the diversity of offerings and development potential of this important tourism sector in the country. Presented table (1) below shows data collected in 2022 and 2023 from State Bureau of Statistics for various counties in Croatia.

Table 1. Revenue of Nautical Tourism Ports in Croatia for the Years 2022–2023



Source: DZS (2023): NAUTICAL TOURISM – Capacities and Operations of Nautical Tourism Ports in 2022, available at [https://mint.gov.hr/UserDocsImages//2023\\_dokumenti//230428\\_dzs\\_nauticki2022.pdf](https://mint.gov.hr/UserDocsImages//2023_dokumenti//230428_dzs_nauticki2022.pdf), accessed 21.06.2024.

In 2023, nautical tourism ports in Croatia achieved significant financial growth, generating a total of 161 million euros in revenue (excluding VAT), marking a 12.1% increase compared to the previous year (Table 1). The largest share of total revenue, amounting to 115 million euros or 71.6%, comes from berth rentals (DZS, 2023). This sector experienced a 14.6% increase from 2022, further confirming its crucial role in Croatia's nautical tourism economy. In 2023, all Croatian counties with nautical tourism reported an increase in total revenue compared to the previous year. Dubrovnik-Neretva County recorded a growth of 19.6%, Zadar County 15.6%, Istria County 14.1%, Split-Dalmatia County 12.4%, Primorje-Gorski Kotar County 8.7%, and Šibenik-Knin County 8.3% (DZS, 2023).

Continuing the trend from the previous year, nautical tourism ports in Šibenik-Knin County remain the leaders with the highest revenues. The total revenue amounts to 40 million euros, representing an impressive 24.6% of the total revenue of nautical tourism ports in Croatia (DZS, 2023). Of this amount, 26 million euros, representing 64.9% of Šibenik-Knin County's revenue, comes from berth rentals. These statistics indicate the continuous growth of nautical tourism in Croatia, highlighting berth rentals as the main revenue generator and the regional diversity in the distribution of tourism revenue along the coast. The upward trends are driving further investments in infrastructure and promotion, ensuring the sustainable development of nautical tourism as a key segment of Croatia's tourism offerings.

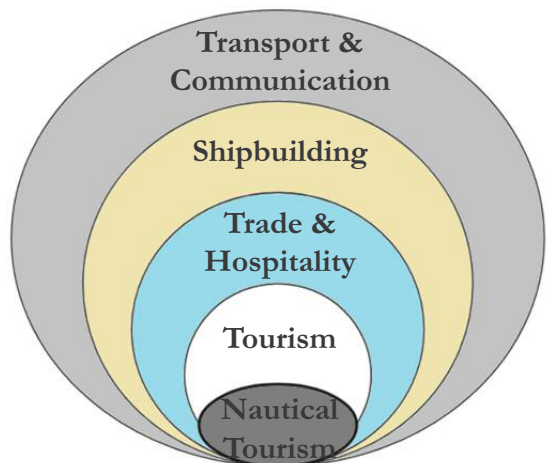
The private sector contributes to nautical tourism through investments in various tourist services and attractions tailored to seafarers. This includes luxury hotels, villas, and apartments along the coast, exclusive restaurants, and bars, as well as activities like diving, sailing, fishing, and organized excursions to nearby islands (Alkier et al., 2015).

## 2. 4. Economic Effects of Financing Nautical Tourism in Croatia

Tourism has a significant impact on the economies of many countries, which can be explained through various effects that contribute to the growth of this industry. Tourism directly influences a country's prosperity and contributes to its economic growth. In countries with developed tourism sectors, the share of tourism in the gross domestic product (GDP) is typically higher than in less developed countries. Therefore, less developed, and transitional countries rely heavily on tourism as a key factor in their economic development. The Croatian economy is particularly sensitive to tourism, even more so than in most other countries. This is evidenced by the fact that tourism revenue accounted for 14.1% of Croatia's GDP in 2022 (DZS, 2023), the highest share in Europe. Alongside Croatia, other Mediterranean countries like Malta (14%) and Cyprus (12.8%) also have a significant share of tourism in GDP. In comparison, the share of tourism in GDP is notably lower in other European Union countries, such as Italy at 2.2%, France at 1.9%, and Spain at 4.7% (Šorak and Marušić, 2015).

Nautical tourism in Croatia brings numerous positive effects, impacting quality of life, urbanization, environmental management, and the economy. This sector generates a range of direct and indirect effects that stimulate the development of various economic segments. As shown in Figure 1, the economic sectors with the largest contribution to nautical tourism in Croatia are transport and communications. Marinas, as complex facilities, offer a wide range of services and often achieve high profitability, making investment in their construction more attractive compared to other forms of tourism (MMPI, 2009).

*Picture 1. Economic sectors with the greatest economic contribution to nautical tourism in Croatia*



Source: adapted by the author from Ivanić and Perić Hadžić, 2018, p. 63

The profitability of nautical tourism varies depending on factors such as the marina's specific location, market conditions, the seasonal nature of operations, and infrastructure investments. Unlike some other tourism sectors, nautical tourism can have long amortization periods, lasting up to 20, 30, or even 50 years (Šorak and Marušić, 2015).

## 2. 5. Comparison Italy vs. Croatia Nautical tourism

Nautical tourism plays a key role in the economies of Croatia and Italy, given their extensive coastlines and favorable climates that attract tourists from around the world. However, a detailed comparative analysis of nautical tourism revenue in these two countries reveals important differences and similarities that shape their economic environment.

Croatia is renowned for its intricate coastline stretching over 6,000 kilometers, including islands, islets, and reefs. According to data from the Croatian Bureau of Statistics, total revenue from nautical tourism in Croatia has been growing year after year. In 2023, revenues from nautical tourism ports reached 161 million euros, excluding VAT, representing a 12.1% increase compared to the previous year. The largest share of total revenue, 71.6% or 115 million euros, comes from berth rentals, highlighting the importance of this service to the nautical sector. Additionally, revenue from berth rentals increased by 14.6% compared to 2022. Geographically, the highest revenue from nautical tourism in Croatia is generated in Šibenik-Knin County, which in 2023 produced 40 million euros, accounting for 24.6% of the total revenue in the country. It is followed by Zadar, Istria, and Split-Dalmatia counties, which also recorded significant revenue growth.

As shown in Table 2, all regions experienced revenue growth in 2023 compared to the previous year, 2022. The Emilia-Romagna region recorded the highest revenue in both years, with 334,000 euros in 2022 and 366,000 euros in 2023.

*Table 2. Revenue (000 EUR) of Italian Nautical Regions from 2022–2023*

Region	2022	2023
Basilicata	78	85
Calabria	82	89
Campania	61	67
Emilia - Romagna	113	125
Total	334	366

Source: Revision of Authors from data Istituto Nazionale Ricerche Turistiche (IS.NA.R.T.), 2024.



Italy, with a coastline of approximately 7,500 kilometers and over 160,000 berths, is one of the main destinations for nautical tourism in the Mediterranean (Russo et al., 2016). The annual spending on tourist activities by boaters in Italy, excluding boat-related expenses, amounted to over four billion euros in 2022. Additionally, Italian shipbuilding contributes significantly to the national economy, with production reaching 3.6 billion euros in 2021, supported by substantial export contributions (ISNART, 2024).

Italian shipyards mainly focus on the production and sale of large vessels, further strengthening their position in the global market. In 2021, Italian maritime and civil motor vehicle offices issued nearly 71,000 permits (ENIT SPA, 2024), which includes new issuances, renewals, and replacements, reflecting the growing interest in recreational boating.

When comparing nautical tourism revenues between Croatia and Italy, several key factors stand out. Italy has a considerably larger nautical tourism market compared to Croatia, in terms of both total revenue and the number of tourists (Ivaldi, 2014). While Croatia's market is characterized by a large share of revenue from berth rentals, the Italian market is marked by greater revenue diversification, including significant income from shipbuilding and the sale of large vessels. In Croatia, revenue is concentrated in a few key counties, whereas in Italy, income is more widely distributed along the entire coast, with a particular focus on regions like Liguria, Tuscany, and Campania (Russo and Rindoino, 2019).

Italian boaters spend four to five times more on land compared to land-based tourists (Ivaldi, 2014), whereas Croatian revenue is more focused on berth rentals and related services. Nautical tourism significantly impacts the GDP of both countries, though in Croatia, this impact represents a higher percentage of GDP due to the relative size of the economy and the importance of tourism as an economic sector. Italy has a stronger tradition in shipbuilding and greater investment in the development of infrastructure for nautical tourism, as evidenced by higher production numbers and the issuance of permits.

### **3. CONCLUSION**

In conclusion, Croatia's nautical sector is a key driver of the national economy, attracting tourists, generating revenue, and supporting diverse industries. This research demonstrates that Croatia's infrastructure and market positioning have strengthened its competitive edge in the Mediterranean. However, challenges, particularly in environmental sustainability, require ongoing attention.

While both Croatia and Italy generate substantial revenue from nautical tourism, Italy stands out for its diversified and expansive industry, yielding higher overall income. In contrast, Croatia leverages its natural assets and focuses on specific services, such as berth rentals, to maximize income. Both countries have growth potential but require strategic investments and policies aimed at sustainable development and attracting foreign tourists to fully harness the benefits of nautical tourism.

By fostering sustainable practices, investing in infrastructure, and upholding environmental standards, Croatia can continue to thrive as a premier nautical destination. Sustainability is essential to Croatia's nautical tourism, with investments in green technology, eco-friendly practices, and resource conservation vital for long-term success. Beyond environmental benefits, sustainable nautical tourism brings economic advantages, creating jobs, enhancing local revenue, and contributing to GDP growth.

Funding for Croatia's nautical tourism is a blend of public, private, and international sources, each playing a critical role in the sector's growth. Public funding supports infrastructure and promotional efforts, the private sector brings flexibility and innovation, and international sources add financial strength and expertise. Specific areas like charter and cruising tourism further strengthen the economic foundation, enhancing Croatia's global competitiveness in nautical tourism.

Given these factors, nautical tourism has strong potential for continued growth and a lasting impact on Croatia's economy, provided that sustainable practices and quality service investments remain a priority.

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## NAUTIČKI TURIZAM U HRVATSKOJ

**Sažetak:** Nautički turizam postao je ključni čimbenik hrvatskog gospodarstva, potaknut velikim pomorskim resursima zemlje, strateškim položajem i dobro razvijenom infrastrukturom. Ova studija istražuje ključne elemente hrvatskog sektora nautičkog turizma, fokusirajući se na infrastrukturne kapacitete, prihode luka i ekonomski utjecaj na povezane industrije. Metodološki, istraživanje kombinira kvantitativnu analizu podataka o prihodima i komparativne procjene hrvatskog i talijanskog sektora nautičkog turizma kako bi se ocijenilo konkurentsko pozicioniranje na mediteranskom tržištu. Rezultati naglašavaju oslanjanje Hrvatske na specijalizirane usluge, posebice najam vezova, kao primarni izvor prihoda, dok talijanski nautički sektor ima koristi od diverzificiranije baze prihoda.

Unatoč snažnom rastu, Hrvatska se suočava s izazovima povezanim s održivošću okoliša, naglašavajući potrebu za politikama koje podržavaju zelena ulaganja i ekološki prihvatljive prakse. Nalazi sugeriraju da bi strateška ulaganja u infrastrukturu i pridržavanje politika održivog razvoja mogli ojačati poziciju Hrvatske kao vrhunske nautičke destinacije. Ovaj rad naglašava važnost uravnoteženja gospodarskog rasta i očuvanja okoliša kako bi se održala pomorska privlačnost Hrvatske za buduće generacije.

**Ključne riječi:** Nautički turizam, Ekonomski učinak Održivi razvoj