

# HRVATSKI GEOGRAFSKI GLASNIK

CROATIAN  
GEOGRAPHICAL BULLETIN  
64

ZAGREB  
2002.

# HRVATSKI GEOGRAFSKI GLASNIK

Izdaje  
Hrvatsko geografsko društvo

Published by  
Croatian Geographical Society

Adresa uredništva

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Časopis izlazi jednom godišnje  
Izdavanje časopisa sufinancira Ministarstvo znanosti,  
tehnologije i informatike Republike Hrvatske  
Časopis je zaključno do vol 58 (1996.) izlazio pod  
nazivom Geografski glasnik, a s vol 59 (1997.)  
promijenio je ime u Hrvatski geografski glasnik.

The journal is published annually  
The journal is supported by Ministry of Science,  
Technology and Informatics of the Republic of Croatia  
Conclusively to Vol. 58 (1996.) the journal appeared by  
the name of Geographical Bulletin, and with Vol. 59  
(1997.) it changed the name to Croatian Geographical  
Bulletin.

**Tisak - Printed by**  
Heroína - Zagreb

**Naklada - Edition**  
700 primjeraka - copies

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# Characteristics of Nautical Tourism in Croatia

Vesna Mikačić \*

In this work the author gives a survey of the trends of the nautical tourist offer and demand in the last five years, and points to the importance of particular regions in the country's nautical tourism. The share of nautical tourism in the whole tourism of Croatia is small, and that is the reason of slight knowledge of its characteristics. The survey carried out in the summer of 2001 in 22 marinas from Umag to Dubrovnik gives an insight into the basic qualitative characteristics of the nautical tourist demand, as well as into the rate and structure of the nautical expenditure. Further research is necessary to test the influence of the nautical tourism development upon the space and environment.

**Key Words:** tourism, nautical tourism, survey, Croatia

## Obilježja nautičkog turizma u Hrvatskoj

U radu autor daje pregled kretanja nautičke turističke ponude i potražnje u zadnjih pet godina te ukazuje na važnost pojedinih regija u nautičkom turizmu zemlje. Udio nautičkog turizma u ukupnom turizmu Hrvatske malen je, a to je i razlog slabog poznavanja njegovih obilježja. Anketno istraživanje provedeno u ljeto 2001. godine u 22 marine od Umaga do Dubrovnika daje uvid u osnovna kvalitativna obilježja nautičke turističke potražnje kao i u visinu i strukturu potrošnje nautičara. Daljnja istraživanja potrebna su kako bi se ispitalo utjecaj razvoja nautičkog turizma na prostor i okoliš.

**Ključne riječi:** turizam, nautički turizam, anketno istraživanje, Hrvatska

## INTRODUCTION

Nautical tourism is a more and more popular form of spending holidays. Yacht tourism, exclusive at the beginning, becomes available to a wide circle of tourist consumers by the increase of living standards and development of various kinds of vessels. Because of its natural characteristics and closeness of the principal markets, the Mediterranean basin is an especially attractive area for the nautical tourism development. During the 1960s the western part of the Mediterranean was already "too narrow" for the yachtsmen, and with the demand increase, they looked for new destinations. That was the time of the development of the nautical tourism of

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Greece, Croatia, Turkey, but also of Portugal, the coast of which although without naturally protected ports, became, by building of marinas, a popular nautical destination on the route Atlantic-Mediterranean. Most of yachtsmen sail from port to port, and a smaller number of them stay at one place for a longer time. According to that and other characteristics, that segment of tourist demand differs from the tourists using the classic forms of accommodation.

There are less published works dealing with nautical tourism than those dealing with other kinds of tourism. In the field of nautical tourism Smith and Jenner (1994, 1995) write about the sporting tourism at sea and about marinas in Europe, while Chaparia V. E. et al. (1998) analyses nautical tourism as a kind of recreative tourism in the Mediterranean on the example of the region Valencia in Spain, and Piqueres V. Y. et al. (2000) discusses possibilities in the nautical tourism development. In 1996 a world congress on the coastal and nautical tourism took place in San Francisco, and in 1994 a round table conference "Littoral and Sea Bed of the Adriatic - a Real Chance for Croatian Tourism" took place in Rijeka (Croatia), where there were extensive presentations about nautical tourism. In Croatia, chiefly economists deal with the problems of nautical tourism and marinas. So M. Montana (1983) discusses the conception of the development of nautical tourism on the Adriatic, and L. Petrić (1995) talks about the role of nautical tourism in the country's tourist development, while S. Weber et al. (1994) analyse the problems of the nautical tourist market. On the regional basis, N. Jančić (1991) considers the optimal development of nautical tourism in the municipality of Dubrovnik, B. Laća (1996) deals with marinas, ports and little ports in the function of the nautical-tourist offer of the Zadar riviera, while the nautical tourism of Istria is analysed by M. Vukčević and R. Dovečar (1996). As to geographers, the nautical tourism problems as the factors of a qualitative development of the Croatian Adriatic tourist offer was several times analysed by T. Žabica (1995, 1999, 2000), while R. Mesarić and D. Jelinčić (2001) consider the connection between nautical science and culture as one of the possible aspects of the tourism development strategy. Different from the individual works and studies mostly based on statistical sources, there are few research works relying on surveying. In order to collect the qualitative information about nautical tourism, as well as the level and structure of its expenditure in the summer of 2001, the Institute for Tourism, Zagreb, organised a survey (S. Weber et al., 2002). The realised research about the yachtsmen's attitudes and expenditure gives an insight into the characteristics of nautical tourism, but also into the possibilities of its comparison to the classic form of the stationary tourism in Croatia.

## DEVELOPMENT OF NAUTICAL TOURISM IN CROATIA

The former development of tourism in Croatia has shown that nautical tourism, besides the classic maritime-holiday one, has the greatest chances for development. The basis of the nautical tourism development is a spacious maritime zone of interior and territorial waters 33 thousand square kilometres in area, and 5,835 km long insular and coastal line with the indentedness coefficient of 9.7.

There are 363 ports, little ports, anchorages and marinas of nautical tourism<sup>1</sup>. The most indented areas of the archipelago are the aquatories of Kvarner, Zadar and Dubrovnik where most of ports (60%), little ports, anchorages and marinas are situated. However, with regard to the realised nautical tourist flow, the archipelago of Šibenik is the most attractive for yachtsmen. The aquatory navigation is secured by lighthouses, navigation marks, as well as by meteorological, repair and rescue services.

The beginnings of nautical tourism on the Croatian coast appeared even before the Second World War, and yachtsmen used services of the coastal and insular ports. Only by the end of the 1960s and at the beginning of the 1970s, within the framework of the project "Southern Adriatic" and "Upper Adriatic" the plans were made for building ports assigned exclusively to nautical tourists (T. Žabica 1995). Soon after, first five specialised and suitably equipped marinas were built: in Punat, Mali Lošinj, Zadar, Split and Dubrovnik (M. Montana 1994). After that the building of marinas was quickened, and by 1984, there were 19 marinas with 4,466 moorings, and in the period from 1984 to 1990, 20 more marinas were built with 5,814 moorings. So, by the beginning of the 1990s, 39 marinas with 10,280 moorings were distributed in that area (T. Žabica, 1995). The latest statistical data from 2002 show that today there are 66 ports of nautical tourism from Savudrija to Rt Oštro, among which there are 51 marinas with 14 thousand moorings.

Tab. 1 Development of the nautical offer in Croatia, 1997-2001  
Tab. 1. Razvitak nautičke turističke ponude u Hrvatskoj, 1997-2001.

	1997	1998	1999	2000	2001	Index 2001/1997
NUMBER OF PORTS OF NAUTICAL TOURISM	42	50	55	60	66	157
number of marinas included	42	47	49	47	51	121
CAPACITY						
number of moorings	10.465	11.860	12.437	12.863	14.009	134
NUMBER OF SAILINGS IN vessels in transit	111.296	121.161	110.614	144.318	161.378	145

Source: Statistički ljetopis Republike Hrvatske, DZS, 1996–2002.

Although nautical tourism makes only a smaller part in the total tourist flow of Croatia, about 7 percent of the total arrivals or 2 percent of total overnights, that kind of tourism records more dynamic rates of growth than the stationary one. In the past five years the tourist flow of yachtsmen has been doubled, and the average annual rates of growth amounted to about 15 percent.

<sup>1</sup> Pravilnik o razvrstavanju i kategorizaciji luka nautičkog turizma (NN 142/99, 47/00, 121/00 and 41/01) classifies the ports of nautical tourism into the following kinds: anchorages, moorings, dry marinas and marinas. The nautical tourism ports must have minimal conditions obligatory by Pravilnik, and only marinas are categorised into three categories (I, II and III) regarding quality of equipment.

Tab. 2 Tourist flow in Croatia, 1996–2001

Tab. 2. Kretanje turističkog prometa u Hrvatskoj, 1996–2001.

YEAR	TOURISTS (in 1000)		OVERNIGHTS (in 1000)	
	YACHTSMEN	STATIONARY	YACHTSMEN	STATIONARY
1996	287	3.899	404	21.456
1997	379	5.206	461	30.314
1998	403	5.449	564	31.288
1999	376	4.751	562	26.564
2000	517	6.620	777	38.406
2001	580	7.280	825	42.579

## BASIC INDEX IN 1996=100

1996	-	-	-	-
1997	132	134	114	141
1998	140	140	140	146
1999	131	122	139	124
2000	180	170	192	179
2001	202	187	204	198

## AVERAGE RATE OF GROWTH

1996-2001	15,1	13,3	15,4	14,7
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Source: Turizam 1996–2001, DZS, Zagreb

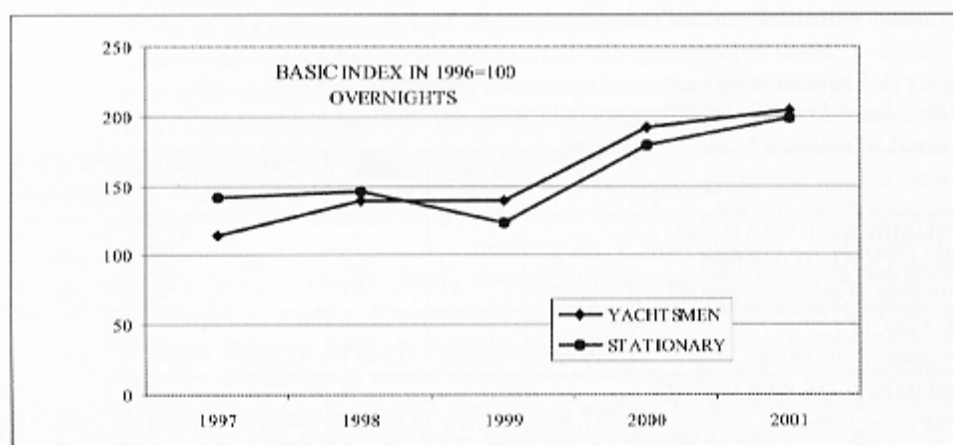


Fig. 1 Index of tourist overnight flow in Croatia

Sl. 1. Indeks kretanja turističkih noćenja u Hrvatskoj

Because of their greater mobility, the average yachtsmen's stay in a destination is much shorter than that of the tourists staying in accommodation facilities. The yachtsmen stay a day and a half in one location averagely, and the stationary tourists six days. However, the total stay of yachtsmen in Croatia is longer than that of the stationary tourists. During their summer holidays most of yachtsmen stay at the Adriatic from two to three weeks, and the stationary tourists from one week to ten days. Most yachtsmen come from the countries of Western Europe. So the Germans, Austrians, and Italians generate between 70 and 80 percent of the total nautical tourist demand of Croatia, while native and Slovenian yachtsmen take part in the



total registered nautical flow between 10 and 12 percent. On the other hand, it is possible to presume that the share of the latter is larger, because, among them, there is a significant number of those who anchor out of the nautical tourism ports without licence and so are not statistically registered.

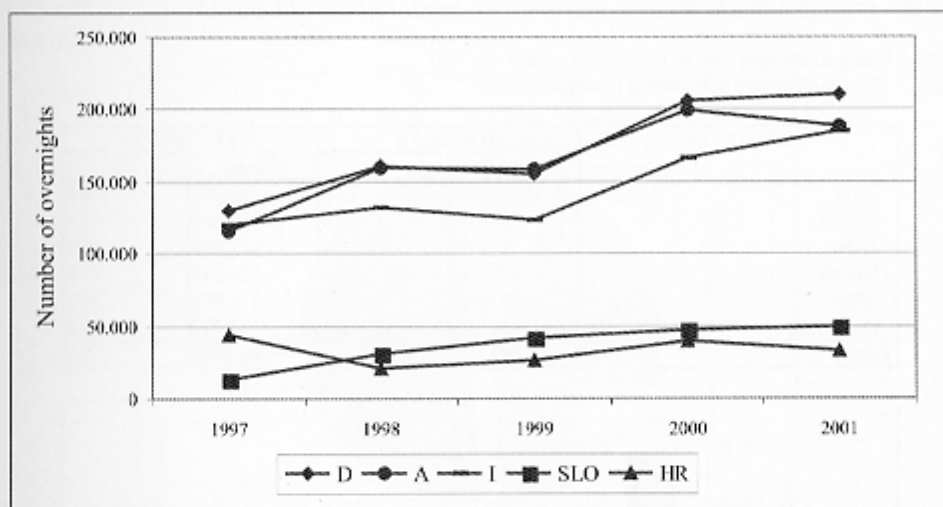


Fig. 2 Nautical tourist flow in Croatia in relation to the country of origin, 1997–2001

Sl. 2. Nautički turistički promet u Hrvatskoj prema zemlji porijekla, 1997–2001.

Nautical tourism, contrary to expectations, is less seasonal than the stationary one. In four top summer months, from June to September, during 2001, yachtsmen realised 78 percent of the total overnights, and the stationary tourists 87 percent.

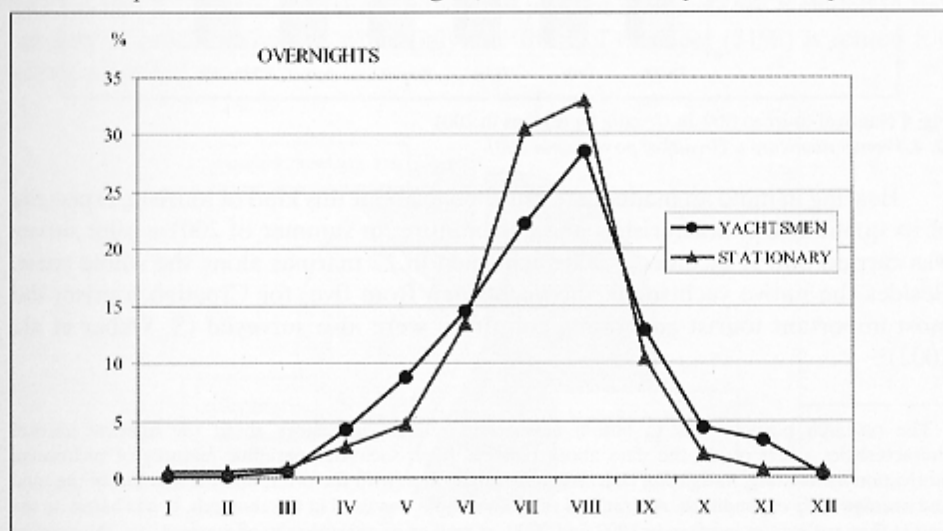


Fig. 3 Monthly distribution of the tourist flow in Croatia in 2001

Sl. 3. Mjesečna distribucija turističkog prometa u Hrvatskoj 2001.

Because of its attractive archipelago, the area of Šibenik records the most intensive tourist flow. In 2001 one third (32% arrivals and 28% overnights) of the nautical tourist flow of Croatia was realised there. Then Istria comes, where about one fifth (21%) of the yachtsmen's overnights was realised because of the closeness of the principal markets.

Tab. 3 Nautical tourism flow in Croatia by regions in 2001

Tab. 3. Promet nautičara u Hrvatskoj po regijama 2001.

REGION OF	TOURISTS		OVERNIGHTS	
	Number	%	Number	%
Istria	98,888	17.0	169,248	20.5
Kvarner	62,700	10.8	110,560	13.4
Zadar	86,786	15.0	125,801	15.3
Šibenik	188,048	32.4	229,543	27.8
Split	97,462	16.8	116,981	14.2
Dubrovnik	46,576	8.0	72,777	8.8
Totally	580,460	100.0	824,910	100.0

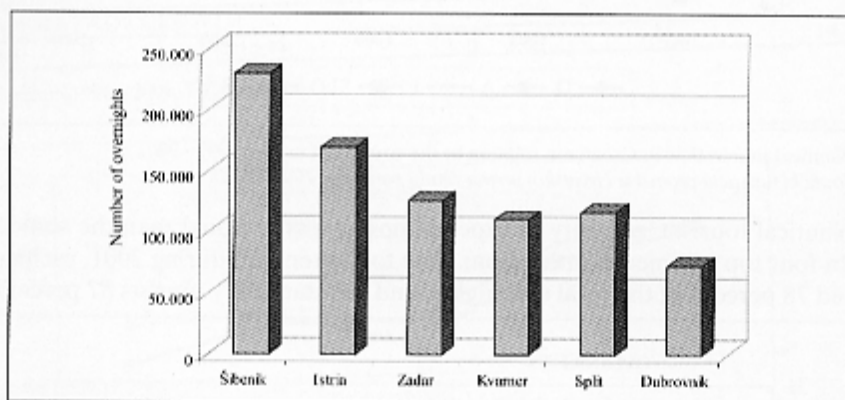


Fig. 4 Nautical tourism flow in Croatia by regions in 2001

Sl. 4. Promet nautičara u Hrvatskoj po regijama 2001.

Bearing in mind an inadequate knowledge about this kind of tourism, especially of its qualitative characteristics and expenditure, in summer of 2001 a pilot survey was carried out. It included 1,500 yachtsmen in 22 marinas along the whole coast. Besides the native yachtsmen, the yachtsmen from five, for Croatian tourism the most important tourist generating countries, were also surveyed (S. Weber et al., 2002)<sup>2</sup>.

<sup>2</sup> The research purpose was to obtain actual and reliable indicators about the nautical tourism characteristics - first of all, the data about nautical fleet, socio-demographic features of yachtsmen, motivation for coming, navigation characteristic, satisfaction with the offer, and the amount of the total and average daily expenditure. A stratified random sample was used in the research. It was based on the tourist flow realised in marinas in 1999 and 2000, as well as on the capacity of marinas, i. e. the number of moorings. The research strata were the country of the tourist origin, travelling organisation (individual or charter travelling), the length of the vessel and surveyed period (from June to September). The work presents the chosen important finds of the carried out research.

## MAIN CHARACTERISTICS OF NAUTICAL TOURISM IN CROATIA

### Tourist nautical fleet

The research finds show that in 2001 a half of the tourist nautical fleet consisted of sailboats (51%) among which those of medium length (11-13 m) are more numerous.

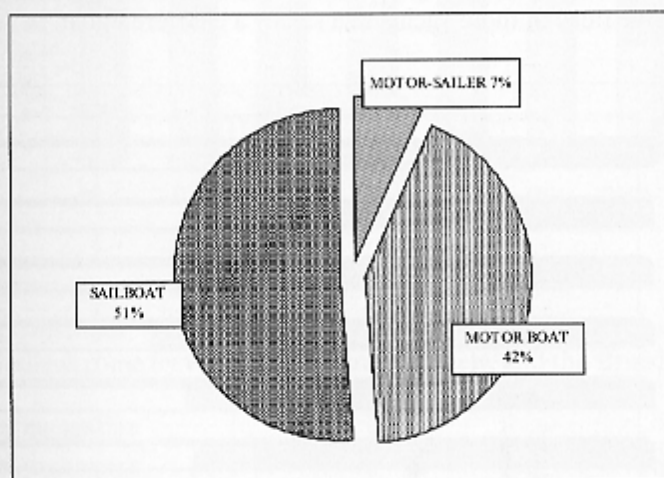


Fig. 5 Kinds of vessels  
Sl. 5. Vrsta plovila

Concerning property, most of vessels are private, whether the owner sails on it or has lent it to his friends and relatives. 69 percent of vessels are included in the category of private property, while only one third of the fleet (31%) is rented for sailing, so-called charter.

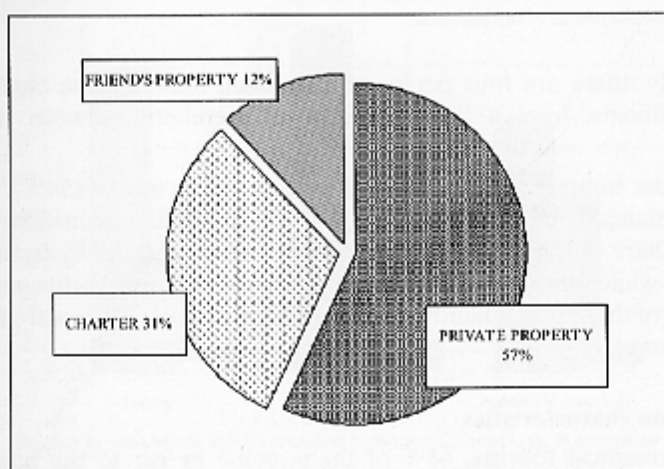


Fig. 6 Possession of vessels  
Sl. 6. Vlasništvo plovila

As to the chartered vessels, sailboats prevail (74%), which points to a greater inclination of the nautical segment towards the traditional kind of navigation, while in individually organised navigation motorboats prevail (60%). It is characteristic that almost a half of yachtsmen (49%) coming from the countries of Central Europe (Hungary, Czechs, Poland) charter a vessel, and the yachtsmen from the traditional West-European markets are mostly the owners and more rarely charter a vessel. In average, only one third of those yachtsmen sail by a chartered boat.

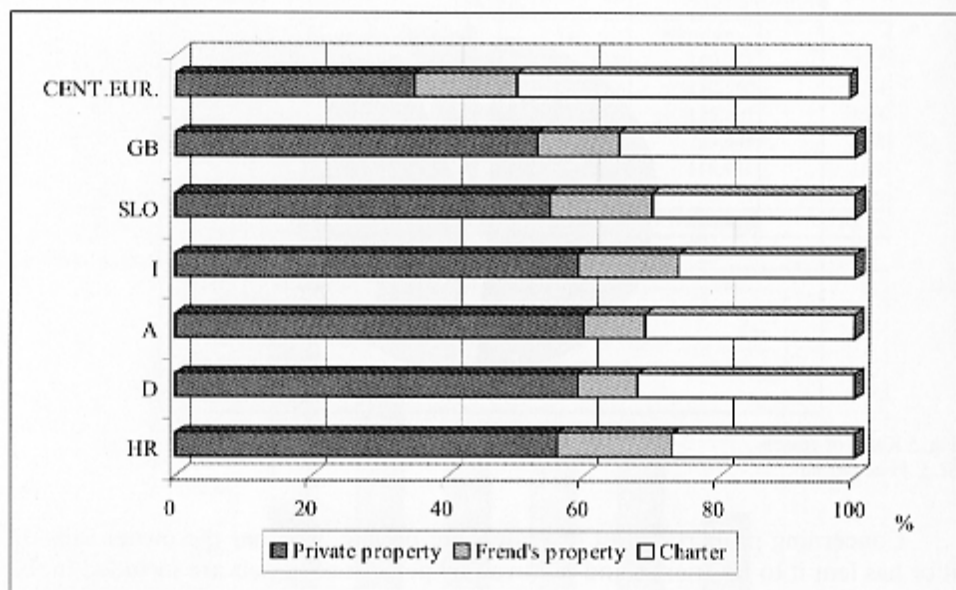


Fig. 7 Property of vessels in relation to the country of origin

Sl. 7. Vlasništvo plovila prema zemlji porijekla

Averagely, there are four persons on a vessel, although the chartered vessels, especially sailboats, have a larger number of members, between five and six persons.

During the summer months most of vessels are in transit (54%), and less of them are permanently moored in marinas (46%). The Italian yachtsmen account for the greatest share of the vessels in transit (65%) which sail chiefly from the Italian parent ports, while among the German, Austrian and native yachtsmen there is a greater share of those permanently moored in marinas where they were found at the moment of survey.

### Navigation characteristics

Most of nautical tourists, 66% of them, come by car to the parent port in Croatia, only 16% come by vessel, one tenth by plane, and the remaining 8% by other vehicles. Here the differences in relation to nationalities are also noticeable.

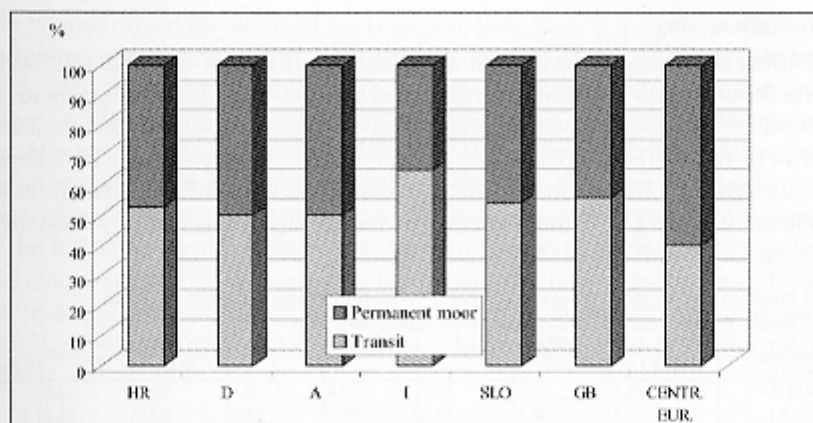


Fig. 8 Kind of the used moor in relation to the country of origin

Sl. 8. Vrsta korištenog veza prema zemlji porijekla

The Croats, Austrians, Slovenians and Germans come by car at an above-average level. The Italians come by vessel more than averagely, and the British by plane.

### Kind of navigation

Most of yachtsmen, 71 percent of them, who sail along the Croatian side of the Adriatic, mostly cruise by the coast and islands, while a quarter of them (25%) stay in the parent port from where they go for trips. Among nautical tourists there are a smaller number of respondents who are on a cruise in the Mediterranean, only 3.4 percent of them. Among the latter, the British account for an above-average share (14.8%), and as to the daily excursionists, it is the Croats (3.2%) and Germans (28.4%).

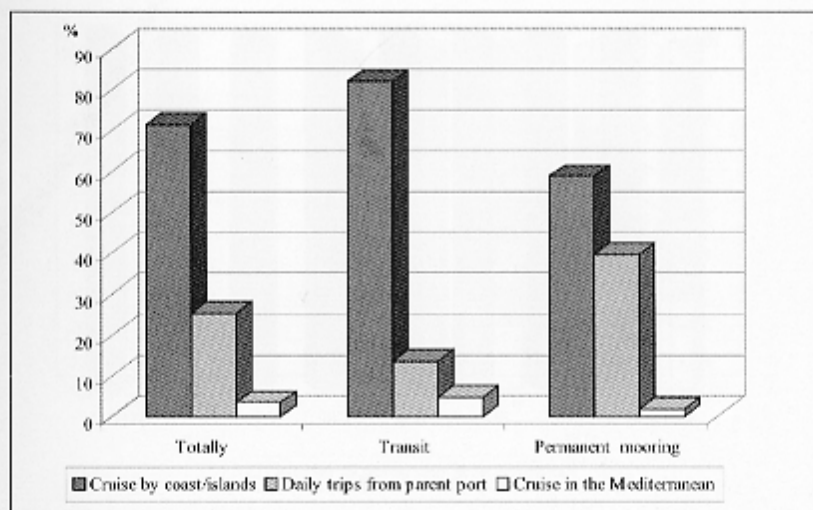


Fig. 9 Kind of navigation

Sl. 9. Vrsta plovidbe

### Length of stay

Different from a short stay in a destination, most of nautical tourists stay in Croatia from two to three weeks. But there are differences among them. So the guests on an individual travelling stay nearly twice as long (24.4 days) than those on charter (13 days), the guests with a permanent moor stay longer (24.5 days) than those in transit (17.8), and among the Germans and British there is the largest share of yachtsmen staying in Croatia over three weeks (26-27 days). The Austrians follow (20 days), then the Italians (18 days).

Tab. 4 Length of the yachtsmen's stay in Croatia in relation to the countries of origin

Tab. 4. Duljina boravka nautičara u Hrvatskoj po zemlji porijekla

DAYS	TOTALLY	Croatia (%)							CENT. EUR.
		HR	D	A	I	SLO	GB		
1 to 7	22.1	29.1	18.8	30.6	16.2	23.2	13.6	26.2	
8 to 14	32.2	30.3	34.8	26.6	34.8	37.7	23.5	46.2	
15 to 21	25.8	24.6	19.9	22.6	33.6	25.4	34.5	18.5	
22 to 28	4.2	2.3	6.3	3.4	3.7	5.1	6.2	1.5	
29 and more	15.7	13.7	20.2	16.8	11.7	8.6	22.2	7.6	
Totally	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

### Socio-demographic profile of nautical tourists

As the research results show, nautical tourists are older than the tourists staying in accommodation facilities. The average age of the yachtsmen in Croatia is 46, while the average age of a guest in an accommodation structure makes 40. But there are differences in age among yachtsmen. So among the Central European and Slovenian yachtsmen there is an above-average share of the young. Among the Croatian yachtsmen there are more middle-aged, and as to the British and German yachtsmen, there is an above-average share of those over the age of 55. It is characteristic that the yachtsmen on a charter travelling are averagely younger (43 years) than the yachtsmen sailing by their own ships (46 years).

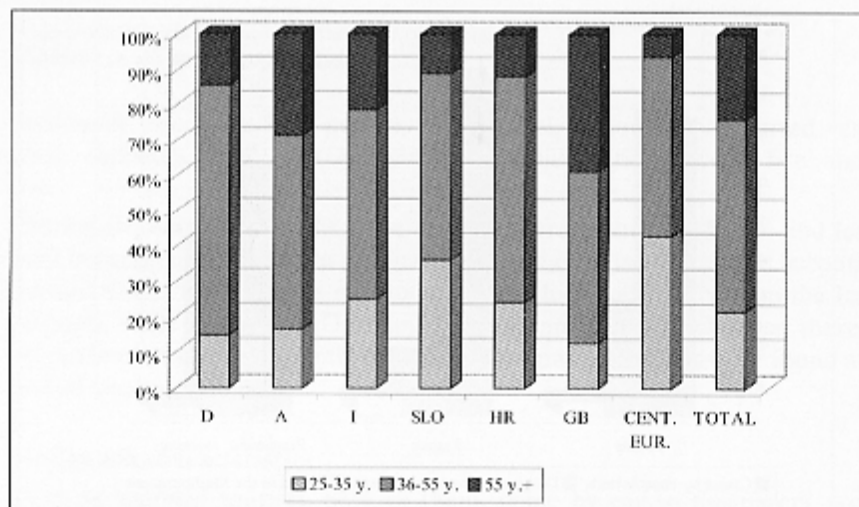


Fig. 10 Age of yachtsmen in relation to the country of origin

Sl. 10. Dob nautičara prema zemlji porijekla

It is characteristic for nautical tourists that they have a higher education than the traditional ones. The differences are also visible in occupations: there is a greater deal of managers and members of free profession and pensioners among yachtsmen, while among the stationary tourists there are more employees and workers. However, among yachtsmen there are also differences, especially when the country of origin is analysed. So among the yachtsmen from the Central European countries, Croatia and Great Britain, there is an above-average share of managers, among the Italians a greater share of the free profession persons, among the British and German pensioners, and among the Austrians and Slovenians employees. Bearing in mind socio-demographic characteristics, it is evident that the nautical population, in relation to the classic tourists, makes a segment of higher payment possibilities.

### Motivation for coming

The main motives for coming of nautical tourists to the Adriatic are rest and relaxation, getting to know the natural beauties, favourable conditions for navigation and new experiences and adventures. Convenient prices are a more rarely mentioned motive, which is somewhat more marked by the British, the yachtsmen from Central Europe and other countries. Some differences exist between the individual yachtsmen and those on charter. While the first ones often stress the motives of rest and relaxation, the other find more important the motive of new experiences and adventures, as well as favourable conditions for navigation.

### Frequency of coming

Frequency of coming to a certain place or country is the indicator of loyalty and satisfaction of a tourist with the offer. Nautical tourists are, as the survey results

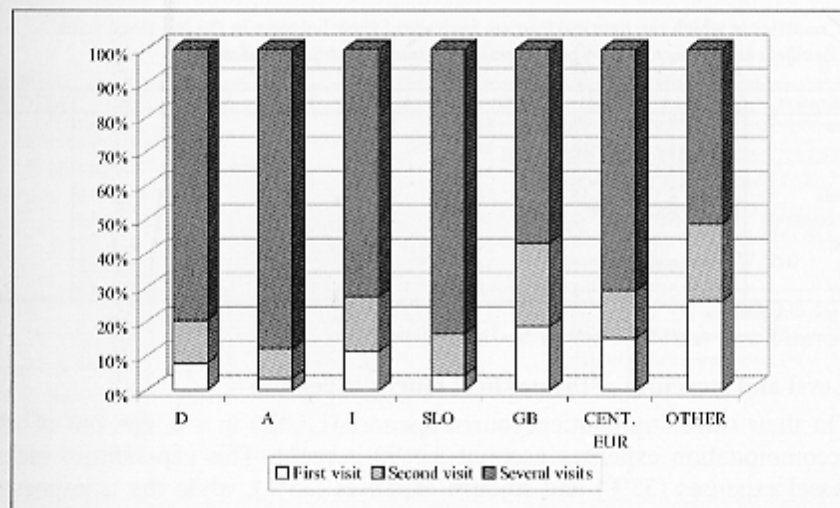


Fig. 11 Frequency of coming to Croatia in relation to the country of origin

Sl. 11. Učestalost dolaska u Hrvatsku prema zemlji porijekla

show, a more loyal clientele than the stationary tourists. Among them, the share of regular guests, i. e. those who have stayed in Croatia several times, comes to three quarters (76.4%), about 14 percent of them have visited the country twice, and only every tenth (9.6%) is a new guest. As to the stationary guests, i. e. those who stay in accommodation structures, the percent of regular guests is 64%.

Excluding the domestic tourists, the most loyal yachtsmen are the Austrians (88%) and Slovenians (83%), who most often sail in the Croatian waters with over 80% of repeated visits, then the Germans (80%), while the Italians and the yachtsmen from the countries of Central Europe register around 70% repeated visits. A smaller share of the repeated visits to Croatia relates to the yachtsmen from Great Britain and other countries. Half of them have visited Croatia several times (56%, i. e. 51%).

### Other destinations for spending holidays

Although most of foreign yachtsmen visiting Croatia belong to the category of the repeated guests, in the last three years many of them have also visited some of competitive Mediterranean destinations. Besides Croatia, which was visited by somewhat more than a half of the surveyed yachtsmen, Italy and Greece are the most attractive destinations, while Slovenia, France and Turkey are attractive to a lesser extent.

Comparing yachtsmen in relation to the country of origin, besides to Croatia, the Germans sail to Italy, Spain or other countries above-average. The Austrian yachtsmen are often guests in Italy, Greece and Slovenia, and the Italians more than other yachtsmen sail in their native waters, while the British sail to Greece above-average. Croatia and Slovenia are the main nautical destinations for the Slovenians. As to the native yachtsmen, their main destinations are Croatia and Italy.

Tab. 5 Countries in which the nautical tourists have spent their holidays in the last three years

Tab. 5. Zemlje u kojima su nautičari proveli godišnji odmor u zadnje tri godine

Destination	TOTALLY	HR	D	A	I	SLO	GB	(in %)	
								CENT.	EUR.
Croatia	57.9	42.9	61.2	58.1	63.4	64.5	46.7	67.7	
Italy	31.1	19.4	34.3	39.9	34.8	18.8	2.1	20.0	
Greece	14.4	5.7	11.1	17.3	18.9	0.7	30.9	9.2	
Slovenia	8.5	5.1	8.3	10.0	7.8	21.0	0.0	3.1	
Other countries	8.3	2.9	10.4	10.0	5.7	5.1	7.4	15.4	
France	7.4	1.7	8.7	3.0	9.3	1.4	21	3.1	
Spain	6.5	1.1	10.0	7.3	4.8	0.7	22.2	3.1	
Turkey	5.7	1.7	6.9	9.6	3.9	0.7	4.9	0.0	

\* More possible answers

\*\* Destination of spending holidays (3 or more days) in the last three years

### Level and structure of the nautical tourist expenditure

On their travelling nautical tourist spend 841 USD in average, out of which the accommodation expenses account for 90 percent. This expenditure includes the vessel expenses (55%) and sojourn expenses (35%), while the transportation expenses claim 10 percent. Differences in expenditure among yachtsmen are conditioned by the length of their sojourn, as well as by the number of the persons



on the vessel, by the country they are coming from, and by the kind of navigation (individual or charter).

The yachtmen who use their own vessels, i. e. organise travelling individually, because of a longer sojourn and growing presence of the guests from the countries of Western Europe, averagely spend (919 USD) - one fifth more (21%) than the charter yachtmen (721 USD). The difference in expenditure is especially visible in the item: sojourn expenses which include the expenses of food and catering, entertainment, shopping and similar. For their sojourn expenses individual guests set aside (826 USD) up to 22 percent more than the charter yachtmen (644 USD). In the expenditure structure of the charter yachtmen the share of the vessel expenses is larger and accounts for even 60 percent of total expenses.

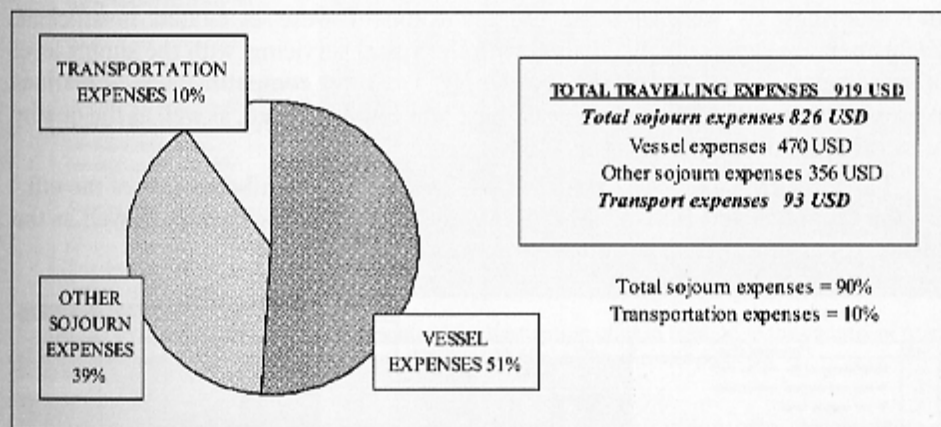


Fig. 12 Average travelling expenses of the individual yachtmen  
 Sl. 12. Prosječni troškovi putovanja individualnih nautičara

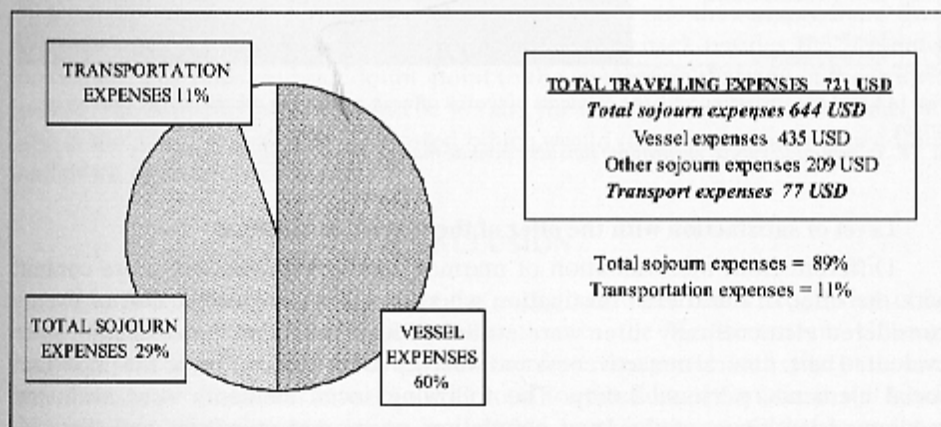


Fig. 13 Average travelling expenses of the charter yachtmen  
 Sl. 13. Prosječni troškovi putovanja čarter nautičara

However, if we observe an average daily expenditure by a yachtsmen, it is significantly greater among the charter yachtsmen and comes to 54.98 USD a day and it makes a quarter more than among the individual guests, whose daily expenditure reaches 36.28 USD. Namely, the yachtsmen who rent a vessel spend, as a rule, less time on travelling, which results in their smaller total expenditure, although their daily expenditure is significantly greater because of the charter.

### Level of satisfaction with the offer in marinas

Evaluating the main elements of the offer in marinas, the survey results show that the guests are critical towards most of the offered services. Only two elements have got a medium mark: hospitality of the marina staff and equipment of marinas by water and current connections. Cleanness and lack of sanitary facilities, water and moorings, as well as neglected environment were evaluated insufficient. Yachtsmen are especially dissatisfied with the vessel servicing, with the supply level of spare parts, as well as with the fuel supply. The offer competitiveness of marinas expressed by the element "value for money" was low estimated, as well as the quality of catering services and shopping.

The most critical guests, who gave the lowest marks to all elements of the offer are the Germans and Italians. The native and Slovenian yachtsmen, as well as the guests from Central Europe and Austria, were less critical.

Rank	Elements of offer	Totally	Croatia	Germany	Level of satisfaction				
					Very high	high	medium	low	Very low
				Austria	Italy	Slovenian	Gr. Britain	Central Eur.	
1.	Helpfulness of the marina staff								
2.	Water and current connections								
3.	Water supply level								
4.	Moorings (width, validity)								
5.	Tidiness and cleanness of environment								
6.	Cleanness of sanitary appliances								
7.	Sufficiency of sanitary appliances								
8.	Fuel supply level								
9.	Quality of catering services								
10.	Shopping possibilities in marina								
11.	Quality of technical service								
12.	Value for money								
13.	Spare parts supply level								

Fig. 14 Level of satisfaction with the elements of tourist offer in marinas in relation to the country of origin

Sl. 14. Stupanj zadovoljstva elementima turističke ponude marina prema zemlji porijekla

### Level of satisfaction with the offer of the tourist destination

Different from the evaluation of marinas, nautical tourists are more content with the offer of the tourist destination where a marina is located. Out of twenty considered elements only three were evaluated high. The elements of nature were evaluated best: natural attractiveness and weather conditions, and as to the important social elements, personal safety. The following social elements were evaluated medium: friendliness of the local population, peace and quietness, and then the quality of food in restaurants. Yachtsmen expressed a low level of satisfaction with the diversity of gastronomic offer, and a very low level of satisfaction with

entertainment and cultural contents in a destination, quality of tourist information, services on travelling, as well as with the value for money.

German yachtsmen are the most critical, Slovenian and Croatian less. It is characteristic that the Germans and Italians, as the most numerous yachtsmen, evaluated variety of gastronomic offer worse than the other, and the Austrians together with the latter the offer of food and drinks in shops.

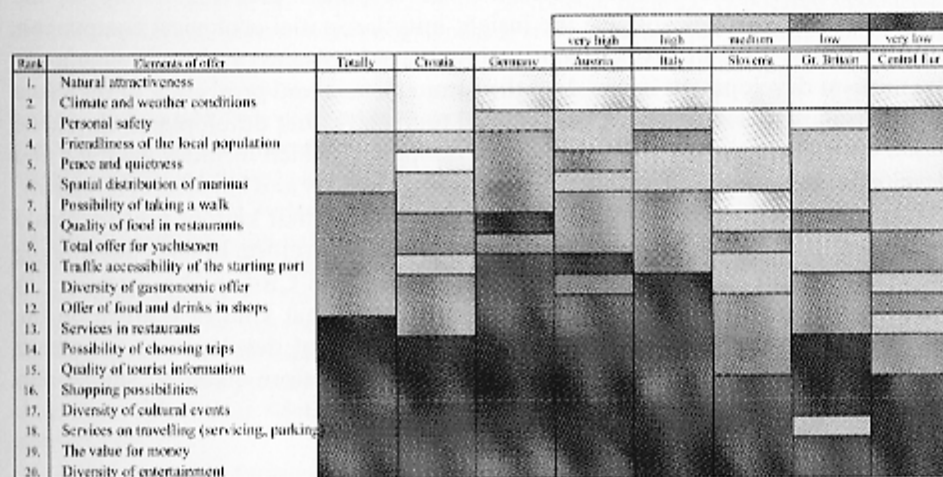


Fig. 15 Level of satisfaction with the elements of the destination offer in relation to the country of origin  
 Sl. 15. Stupanj zadovoljstva elementima turističke ponude mjesta prema zemlji porijekla

Differences among particular guest categories are evident. So the yachtsmen in transit are more satisfied than those who use permanent moorings, and the charter yachtsmen are more satisfied than the individual. These finds show that the guests who come to the Adriatic more often and stay longer better know the offer and are more critical as a rule. However, it is characteristic that among them there is the largest number of permanent guests who come back besides the presented objections. The finds, without doubt, point to the conclusion that one of the priority tasks of the nautical tourism should be to raise the quality of services in marinas, but also in the places where they are located, which would result in a greater expenditure and profit of that tourist segment.

## CONCLUSION

By construction of some fifty marinas in the last two decades Croatia has come closer to the most attractive nautical destinations on the Mediterranean. Although nautical tourism experiences a quicker increase compared with the stationary one, the share of nautical tourists in the total tourist flow of Croatia is still small. It is also one of the reasons of an inadequate acquaintance with this segment of tourist demand. Former research was primarily directed to the observation of the statistically registered nautical flow, and there were almost no data about the

qualitative features, level and structure of the nautical tourist expenditures. The pilot survey carried out in 22 marinas from Umag to Dubrovnik in the summer of 2001 was the first attempt to collect the relevant data by questioning tourists and to compare this segment with the classic tourist demand. The results show that the quality of nautical offer should be increased and substantially enriched. Moreover, the collected data serve as a basis for the evaluation of the nautical tourism economic importance and for its further development planning. However, the carried out survey does not give the insight into the spatial-ecological components of the nautical tourism development and its impact on space and environment. As the tourism development is based on the attractiveness and protection of the space as the primary tourist resource, the nautical tourism further development should be based on the conception of sustainable development, which includes planning and development harmonised with the space carrying capacity and bio-system sensitivity. Taking a long-term view, the extensive development of that kind of tourism would be undoubtedly harmful in spatial-ecological sense. Therefore, besides questioning the attitudes and expenditure of the nautical tourism in Croatia, it is necessary to examine the impact of the intensive development of that kind of tourism on the environment and determine the long-term directions of development consonant with the space capacity. The well-known rule "quality before quantity" should also be applied on the example of nautical tourism.

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Karakteristično je da gotovo polovica nautičara (49%) iz zemalja srednje Europe (Mađarska, Češka, Poljska) unajmljuje plovilo, dok nautičari iz tradicionalnih zapadnoeuropskih tržišta jesu pretežno i vlasnici te rjeđe rentiraju plovilo.

Tijekom ljetnih mjeseci većina se plovila nalazi u tranzitu (54%) a manje ih je na stalnom vezu (46%) u marinama. Udio plovila u tranzitu najveći je kod talijanskih nautičara (65%) koji isplovljavaju pretežno iz talijanskih matičnih luka, dok je među njemačkim i austrijskim kao i domicilnim nautičarima veći udio onih (oko 50%) koji imaju staln vez u marinama.

Većina nautičara, njih oko 71%, koji plove hrvatskim Jadranom uglavnom krstare obalom i otocima, dok tek jedna četvrtina nautičara (25%) boravi u matičnoj luci iz koje odlaze na izlete. Tek manji broj nautičara krstare Mediteranom. Shodno tome je i duljina boravka. Nautičari u pravilu kratko borave na jednom mjestu tako da prosječna duljina boravka u marini iznosi svega jedan do jedan i pol dan dok se njihov boravak u Hrvatskoj kreće od dva do tri tjedna. Međutim, uočljive su razlike u duljini ukupnog boravka. Tako gosti na individualnom putovanju borave skoro dvostruko dulje (24,4 dana) od onih u čarteru (13 dana), gosti na stalnom vezu dulje (24,5 dana) od onih u tranzitu (17,8) a među Nijemcima i Britancima je najveći udio nautičara koji u Hrvatskoj borave iznad tri tjedna (26-27 dana). Glavni motivi dolaska nautičara na Jadran jesu odmor i relaksacija, upoznavanje prirodnih ljepota, pogodnost za plovību te nova iskustva i doživljaji, dok su povoljne cijene rjeđe istican motiv.

I prema sociodemografskim obilježjima ti se turisti razlikuju od turista odsjelih u smještajnim objektima. Nautičari su stariji a prosječna dob nautičara iznosi 46, dok je prosječna dob gosta u smještajnom objektu 40 godina. Za nautičare je karakteristično da imaju višu naobrazbu od tradicionalnih turista, a razlike su vidljive i kod zanimanja. Tako je među nautičarima veći udio rukovoditelja ili pripadnika slobodne profesije te umirovljenika, dok je kod stacioniranih više namještenika i radnika. Međutim, i unutar te skupine postoje razlike posebno kad se analizira zemlja porijekla nautičara.

Učestalost dolaska u neku zemlju ili mjesto pokazatelj je lojalnosti i zadovoljstva turista ponudom. Među nautičarima udio stalnih gostiju tj. onih koji su u Hrvatskoj boravili više puta iznosi tri četvrtine (76,4%). U kategoriju najvjernijih nautičara, ne računajući domaće, spadaju Austrijanci (88%) i Slovenci (83%) s preko 80% višestrukih posjeta, slijede potom Nijemci s 80%, dok Talijani i nautičari iz zemalja srednje Europe bilježe oko 70% višestrukih posjeta.

Premda većina stranih nautičara koji posjećuju Hrvatsku spada u kategoriju stalnih gostiju mnogi od njih posjetili su u zadnje tri godine neka konkurentna sredozemna odredišta. Italija i Grčka su, uz Hrvatsku, najprivlačnija odredišta dok su to u manjoj mjeri Slovenija, Francuska ili Turska.

Na putovanju nautičari potroše u prosjeku ukupno 841 USD od čega 90% otpada na ukupne troškove boravka koji uključuju troškove plovila (55%) i boravka (35%), dok 10% otpada na troškove prijevoza. Razlike u potrošnji među nautičarima uvjetovane su duljinom njihovog boravka kao i brojem osoba na plovilu, zemljom iz koje dolaze te vrstom plovību (individualnom ili čarter). Nautičari koji koriste vlastito plovilo zbog duljeg boravka i veće zastupljenosti gostiju iz zemalja zapadne Europe troše (919 USD) u prosjeku za jednu petinu više (21%) od čarter nautičara (721 USD). Međutim, kad se promatra prosječna dnevna potrošnja po nautičaru tada je ona znatno viša kod čartera a iznosi 54,98 USD na dan i za jednu je četvrtinu (25%) više od individualnih gostiju čija dnevna potrošnja doseže 36,28 USD. Naime, nautičari koji iznajmljuju plovilo u pravilu borave kraće na putovanju što rezultira njihovom manjom ukupnom potrošnjom iako im je dnevna potrošnja uslijed najma plovila znatno viša od onih koji plove na vlastitom brodu.

Nalazi ankete pokazuju da su gosti kritični prema većini ponuđenih usluga u marinama. Samo dva elementa dobila su srednju ocjenu i to: uslužnost osoblja u marinama i opremljenost marina priključcima za vodu i struju. Nedostatnim je ocjenjena čistoća kao i manjak sanitarija, vode i vezova te neuređenost okoliša a posebno su nezadovoljni servisom za plovila. Konkurentnost ponude marina iskazana elementom 'vrijednosti za novac' nisko je ocjenjena kao i kvaliteta ugostiteljskih usluga i mogućnosti za kupnju.

Za razliku od ocjene marina, nautičari su zadovoljniji ponudom u mjestu u kojem se marina nalazi. Od dvadeset elemenata koje su ocjenjivali samo su tri elemenata ocjenjena visoko. Najbolje su ocjenjeni prirodni elementi i to: ljepota krajolika i vremenske prilike te od važnijih društvenih elemenata osobna sigurnost. Srednje su ocjenjeni socijalni elementi: gostoljubivost lokalnog stanovništva, tišina i mir te potom kvaliteta hrane u restoranima. Nizak stupanj zadovoljstva nautičari su iskazali s gastronomijom i ponudom hrane i pića a izrazito su nezadovoljni zabavnim i kulturnim sadržajima u destinaciji, kvalitetom informacija uslugom na putovima kao i s vrijednosti novca u odnosu na kvalitetu ponude. Nalazi, bez sumnje, upućuju na zaključak da jedan od prioriteta zadatka nautičkog turizma je podizanje kvalitete usluga u marinama ali i u mjestima u kojima se one nalaze a što bi rezultiralo višom potrošnjom te zaradom od tog turističkog segmenta.

Received (Primljeno): 2002 - 9 - 19

Accepted (Prihvaćeno): 2002 - 10 - 23