

# Nautical Tourism and Its Function in the Economic Development of Europe

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## 1. Introduction

Tourism as an industry, and nautical tourism as an integral part of it, is an important sector whose indirect effects are more important than the direct, thus supporting the development of many other industries. Within the last 30 years, the three core industries of nautical tourism (the marina, charter and cruise industries) have been continuously showing high growth rates. In this time of crisis, with its lack of inventiveness and investment, nautical tourism and its sectors become a new opportunity for development. Its growth can be clearly seen at local and regional levels, and its constituent parts are becoming potential local economic leaders. This research focuses on the three core segments of nautical tourism (the marina, charter and cruise industries) which have not been sufficiently studied either theoretically or economically.

The aim of this paper is to demystify these three industries of nautical tourism, to indicate the potential for development, especially in Europe, and to contribute both to the scientific and practical economic thinking on this topic. The goal is to suggest to investors the real and unused potential for development, and the fact that investment in the industry of nautical tourism is highly profitable.

Methodologically, decades of research, experience in the economic sector and the analysis and synthesis of research serve as a foundation for this work. An additional groundwork for the conclusions presented in this paper is research into current trends in all aspects of nautical tourism.

The basic hypothesis is the following: there is no doubt that all three industries of nautical tourism are highly profitable, especially the marina and cruise industries. The best evidence for this claim is provided by an economic analysis of the current situation, though there is still a lack of scientific study regarding this hypothesis.

This paper consists of two main parts. The first relates to the theoretical study, definition and positioning of nautical tourism in the European economies and markets. The second part covers specific and practical explanations and analysis.

## 2. Concept and definition of nautical tourism

**Nautical tourism** as a phenomenon is an aspect of tourism in general, from which it has developed as a subtype. The question of defining nautical tourism should thus be considered

in the context of a general definition of tourism. Etymologically, *nautical tourism* is a combination of two notions, *nautical* and *tourism*. The concept of tourism is known and sufficiently studied in many papers<sup>1</sup>, so there is no need for further analysis. The second term *nautical* developed from the Greek word *naus*, meaning ship, boat or seamanship. In modern terms, *navigation* is a set of practical and theoretical knowledge and skills necessary for a boat skipper to sail safely and successfully from the port of departure to the port of arrival. The term *navigation*, together with the associated term *maritime*, in its broader sense, signifies seafaring. That is the reason why the term *maritime tourism*, and other concepts denoting nautical tourism, such as the English *yachting tourism* or German *nautische Tourismus*, are used in international communication. Apart from these, the term *maritime tourism* has recently become more common, thus stressing the maritime component of nautical tourism. The focus of *yachting tourism* is on the yacht as a symbol of luxury at sea which is perhaps more concerned with symbols of status than an interest in seafaring. This contributes to a clearer definition of the term nautical tourism, which is actually more a part of the tourist, rather than the marine, industry. In practice, especially at universities, nautical tourism is claimed by faculties of both economics and maritime studies, each for their own reasons.

Among various definitions<sup>2</sup> of nautical tourism there are several prescriptive ones. Defining nautical tourism may be a matter of concern in the specific context of national legislation, for example in Croatia, which in its *lex specialis* "Act on the Provision of Tourism Services"<sup>3</sup> defines nautical tourism and explains what activities can be included under that heading. All these definitions have their particular purpose, so should not be neglected but rather understood and built upon.

It is necessary to create a definition that best suits the scientific and practical needs of research and work in the industry of nautical tourism. Taking the definition of tourism given by the Swiss W.Hunziker and K.Karpf as a starting point, and by using the specifics of nautical tourism practice, it is possible to offer the following definition:

*"Nautical tourism is a sum of poly-functional activities and relations that are caused by the tourists-boaters' stay within or out of the ports of nautical tourism, and by the use of vessels or other objects related to the nautical and tourist activities, for the purpose of recreation, sports, entertainment or other needs".<sup>4</sup>*

This definition has elements of a *real, conceptual and nominal* definition, since it clarifies the essence of things, determines the content, and explains the meaning.

Why is this definition acceptable given the circumstances in which nautical tourism occurs?

1. In order to apply the *criteria of comprehensiveness* as much as possible, we avoided the trap of a detailed analysis of nautical and tourist activities. Various analyses<sup>5</sup> have

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<sup>1</sup> Kunziker, W. i Karpf, K. "Die Grundriss der Allgemeine Fremdenverkehrslehre", 1942. Definition is accepted by AIEST and WTO

<sup>2</sup> Luković, T. & Gržetić, Z. "Nautičko turističko tržište u teoriji i praksi Hrvatske i europskog dijela Mediterana", HHI - Croatian Hydrographic Institute Split, Split 2007, page 19.-28.

<sup>3</sup> National "Law on The Provision of Tourism Services" 68/2007, article 44

<sup>4</sup> Luković, T. & Gržetić, Z. "Nautičko turističko tržište u teoriji i praksi Hrvatske i europskog dijela Mediterana", HHI - Croatian Hydrographic Institute Split, Split 2007, page 26.

<sup>5</sup> For example TOMAS NAUTIKA 2007., research for one part of the Mediterranean (Croatian coast of the Adriatic), which is conducted by the Institute for Tourism in Zagreb every three years.

shown that *navigation* is not a specific requirement for nautical tourism. Some tourists, for example, may take a charter boat but remain on board without leaving port. Moreover, cruising as a global business and a aspect of nautical tourism is included in this definition, avoiding a restriction to ports only, but introducing vessels as a means in this segment of tourism. Therefore, the word *navigation* is replaced by *use*, which is more comprehensive and thus more suitable.

2. Boaters do not in general limit themselves to marinas. It should be taken into account that many prefer to anchor in bays, or use ungoverned or private moorings, preferring to retain some independence from commercial facilities. Hence the inclusion of the phrase "*or out of the ports...*". The growth of nautical tourism and the range of activities it involves carry the risk of saturation of coastal regions, and it is important to recognise the values of sustainable development if these areas and their attractions are to be preserved.
3. Apart from the essential term "*vessel*", we inserted "*and other objects associated with nautical tourist activities*" because of the increasing diversification of such activities. Thus, for example, overnight stays while sailing increasingly involve accommodation on a fixed site, which is an integral part of many Mediterranean marinas. Other activities and types of vessels (for example tourist submarines and bathyscaphes) are occasionally available, and they are classified within the field of nautical tourism, as they are associated with marinas in terms of location.
4. In addition to sports, recreation and entertainment, to cover the whole range of recognised interests we included the term "*and other needs*". This was done because wider motive-based demands are expanding on a daily basis and it is a part of the growing, strategic management of marinas which offers the highest level of quality in nautical tourism.

Basically, this definition incorporates all the elements that are generally included in the concept of nautical tourism. Other authors have noted many specific features, but this new definition is closer to the objective phenomena that can be observed across the whole range of nautical tourism activities. However, it should be noted that tourism and nautical tourism are *derived concepts* that represent a range of activities susceptible to change. That is why we say that nautical tourism is a multidisciplinary activity that cannot be unequivocally specified.

In the interests of simplicity and for practical daily usage of the term, we propose a shorter version of the definition: **Nautical tourism is a poly-functional tourist activity with a strong maritime component.**<sup>6</sup>

This simple and practical definition emphasises the main characteristics of nautical tourism that places it in the tourist industry, but involving some measure of seafaring skill and knowledge.

### 3. Classification of nautical tourism

Considering the above mentioned basic definition of nautical tourism, which states that **nautical tourism is a poly-functional tourist activity with a strong maritime component**,

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<sup>6</sup> From reviewed lectures "Nautički turizam" held in 2006 by professor Luković, PhD at the Department for economy and business, University of Dubrovnik

its classification should be observed from the scientific and practical aspect. Such a form of analysis and classification is widely used, and all important studies, such as in Germany<sup>7</sup> and England<sup>8</sup>, have applied it. Since this study is linked to such wider research we suggest that the most appropriate classification of nautical tourism would be as follows:

NAUTICAL TOURISM INDUSTRY					
SECONDARY	MAIN ACTIVITIES				ADDITIONAL
	Harbours for nautical tourism	Charter	Cruising		
<ul style="list-style-type: none"> <li>• Diving</li> <li>• Surfing</li> <li>• Rafting</li> <li>• Diving-bells</li> <li>• Rowing</li> <li>• Fishing</li> <li>• Adventurous tourism</li> <li>• “Robinson” tourism</li> <li>• Lighthouse tourism</li> <li>• Etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Berths</li> <li>• Moorings</li> <li>• Dry marinas</li> <li>• Marinas:               <ol style="list-style-type: none"> <li>1. Category</li> <li>5. Category</li> <li>6. Category</li> <li>7. Category</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>• Motor yachts</li> <li>• With skipper</li> <li>• Bare boat</li> <li>• Sailing yachts</li> <li>• With skipper</li> <li>• Bare boat</li> </ul>	Cruisers: <ul style="list-style-type: none"> <li>• Large world cruisers</li> <li>• Local cruisers (traditional):               <ul style="list-style-type: none"> <li>• One-day cruising</li> <li>• Several-days cruising</li> </ul> </li> </ul>	Cruiser harbours: <ol style="list-style-type: none"> <li>a. Large cruiser harbours:               <ul style="list-style-type: none"> <li>• Specialized ports, members of „Med-Cruise“</li> <li>• Non-specialized ports</li> </ul> </li> <li>b. Ports for local traditional craft:               <ul style="list-style-type: none"> <li>- Coastal ports used by small settlements</li> <li>- Island ports</li> </ul> </li> </ol>	<ul style="list-style-type: none"> <li>• Shipbuilding of mega-yachts</li> <li>• Shipbuilding of small sailing vessels</li> <li>• Production of equipment for nautical tourism</li> <li>• Skipper services</li> <li>• Information services</li> <li>• Sailing schools</li> <li>• Research institutes and educational centres</li> <li>• Other services</li> </ul>
SUBJECT OF THE STUDY					

Source: the author T. Luković

Table 1. Classification of nautical tourism

<sup>7</sup> See: Bonn Institute study – dwif/BTE 2002., see: Luković, T. & Gržetić, Z. “Nautičko turističko tržište u teoriji i praksi Hrvatske i europskog dijela Mediterana”, HHI – Croatian Hydrographic Institute Split, Split 2007, page 126.

<sup>8</sup> See: Welsh Enterprise Institute University of Glamorgan Business School: “A Study That Applies the VoE Framework to the Marine and Coast Environment of Wales”, 2006, also: Luković, T.: “Sukobljene ili sukladne strategije razvoja europskog nautičkog turizma”, “Pomorstvo” University of Rijeka, Scientific Journal of Maritime Research, Vol.23 No.2., Rijeka, December 2009, page 341-356.

This classification of nautical tourism, which emphasises its three basic types: (1) marinas, (2) charter and (3) cruising, is justified by the specific characteristics and distinguishing features of these industries.

The state recognised commercial ports of nautical tourism, or more popularly **the marina industry**, are an important part of any European economy, regardless of whether a country has access to the sea or not. The attractions of water are a dominant feature in tourism, hence the justification of the German term "Wassertourismus" or water tourism. Nautical tourism can occur in all the waters of the world, so in addition to the sea, it is present on lakes, rivers and canals, i.e. in both salt and fresh water. An analysis of the marina industry is made more difficult by the lack of a unique European system of marina registration. Different sources provide very different data on the number and capacity of marinas, though that need not affect the general conclusions regarding their importance and role in Europe.

The charter industry, as a subtype of nautical tourism, is generally associated with marinas and it would not exist without them. Charter, in terms of renting and providing services related to work on the vessels, expands the range of its activity, in addition to which hiring a professional skipper is quite common. It is estimated that one charter yacht in five includes the hire of a skipper.<sup>9</sup> As far as capital goes, charter is the least developed industry within nautical tourism, while at the same time involving higher uncertainty and risks due to its structure and business methods.

In relation to capital, cruising is the most developed industry, not only in the context of nautical tourism, but compared to all other industries. The cruising industry offers a rich and varied range of potential regarding vessels, including 300 large international cruise ships, an increasing number of small luxury cruisers (up to 200 passengers), and about 10,000 local traditional vessels, or 'old-timers'. Potential offers consist of excursions or trips lasting one or several days. Such cruises include ports that may or may not be specialized for the reception of cruise ships, so the cruise industry deserves particular attention in terms of research and economic analysis. With about 20 million passengers on large cruisers in 2011 and about twice as many on traditional old-timers worldwide, and with a ten-year increase in passengers carried of over 2.5 times<sup>10</sup>, with approximately 150,000 employees working directly in the cruise industry, and twice as many in related industries and with a turnover of 34.1 billion euros in related industries, the cruise industry has a significant role not only in many national economies, but also in the global economy. The European contribution to the global market in 2010 was around 20-30%.<sup>11</sup> The continuity of development which has been consistently increasing during the past 30 years, with average annual growth rates of 11%, indicates that this industry has grown considerably faster than national economy averages, and has become an important industry in the European and global economy.

#### 4. Main features of nautical tourism industries

The main features of the three core industries of nautical tourism, differentiating them from other industries are the following: (1) they are strongly connected with the sea and fresh water

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<sup>9</sup> <http://www.europeancruiseCouncil.com>

<sup>10</sup> Passenger Shipping Association: Discover Cruises – Annual cruise review, 2006

<sup>11</sup> European Cruise Council: "The cruise industry, a leader in Europe's economic recovery", "Contribution of Cruise Tourism to the Economies of Europe", Edition 2011, page 3.

activities, and (2) they generally take place under some kind of local concession. In addition to a strong connection with the sea and navigation, the nautical tourism business requires some measure of seafaring skills. The sea and other water bodies are a particular aspect of the destination to which these industries must adapt. Conducting a business under concession has an effect in two ways, depending on whether the concession is (1) direct or (2) indirect. For example, in the marina industry there is a direct concession implemented through a concession contract. In the charter and cruising industries, the concession is indirect or hidden and is implemented through a variety of resources for the maintenance of waterways etc.

In addition to the specific circumstances typical for nautical tourism and its sub-industries, there is a strong element of *seasonality*, which is a characteristic of all types of tourism. This seasonal aspect of the industry demands particular management skills and problem-solving strategies to maintain business continuity. Certainly, the impact of seasonality is not absolutely negative, and although it may show some degree of variation through the sub-industries of nautical tourism, but remains always a key feature of the industry.

The connection between the industry and sub-industries of nautical tourism with the destination can create a complex interdependence and mutual impact; this effect is very variable but can be extremely strong. Seen from a market perspective, the nautical tourism market can be considered in terms of *familiarity or novelty*, and it can be classified into:

- A market that is new for business and for boaters - the new market; today it is largely theoretical, although there are some parts of Europe without developed tourism and they are potential new markets.
- A market that is new to boaters, but although recognised by local businesses circumstances have prevented its commercial development - **an effectively new market** (national parks, military zones in Italy and Croatia which have potential as marinas, but to which until recently entry was not permitted; for example particular political destinations like Brijuni in Croatia).
- A market that was known to boaters, but for various reasons have not been commercially developed - **potentially new markets** (bays without infrastructure, most of the Greek coast without sufficiently developed marina industry).
- A market that is developing and expanding its features, and becoming a part of the market supply of nautical tourism - **developing new market** (suitable Italian, Austrian and German lakes, as well as some Mediterranean tourist markets, like Kaštela and Skradin in Croatia).

Some nautical industries influence the development of a certain site or region depending on the market, i.e. the destination which is their focus. That fact refers to all European markets, but with variations in the type and degree of influence. This topic will be analysed further in the text.

Since the charter and marina industries are closely connected, they will be dealt with as such in this paper. This study does not refer to the characteristics of the supply and demand market because they are already well known<sup>12</sup>, but it will consider some less recognised characteristics of the development of nautical tourism and the economy in general.

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<sup>12</sup> Institute for tourism Zagreb: "Tomas nautika 2007" and "Tomas cruising 2006"

#### 4.1 The marina & charter industries

Marinas are the commercially most important ports of nautical tourism, and their general features are worth exploring. It is hard to give specific data on the size, type and capacities of the marina industry in Europe because there is no professional association that would collect, process, research and unify the data, and encourage the development of the industry. We can nevertheless estimate that Europe has about 4,400<sup>13</sup> salt water marinas, of which more than 1,600<sup>14</sup> are of high quality with 400,00<sup>15</sup> berths that meet the highest standards. If we take into account about 600 fresh water marinas, and those belonging to markets for which there is no data, it is estimated that Europe has over 5,000 marinas with more than 500,000 berths. Estimates of the marina industry capital amount to 60 billion euros, taking everything into account, from the berths themselves<sup>16</sup> to the supporting facilities. If we add charter capital to this, it is clear that this represents a considerable investment on the mega European economic level. These two nautical industries have been insufficiently investigated, and they stand on their own in terms of development, so the need for further research relevant to their development is evident.

Marinas can be classified according to<sup>17</sup>:

- a. The level of equipment:
  - standard, with basic conveniences,
  - luxury, with high level of conveniences,
  - recreational, with the possibility of using additional sport, recreational and entertainment facilities
- b. Types of construction
  - American type
  - Atlantic type
  - Mediterranean type
- c. Position of maritime zone
  - open
  - semi-enclosed
  - enclosed
- d. Marina ownership
  - private
  - municipal
  - public
- e. Location
  - sea
  - lake
  - river
  - canal

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<sup>13</sup> [www.portbooker.org](http://www.portbooker.org)

<sup>14</sup> ADAC: "Marinaführer, Deutschland, Europa", 2010

<sup>15</sup> ADAC: "Marinaführer, Deutschland, Europa", 2010

<sup>16</sup> The value of an unfinished investment per berth is about 20,000 euros, but there are additional investments worth five to seven times more than the berth itself.

<sup>17</sup> See: Luković, T. & Gržetić, Z. "Nautičko turističko tržište u teoriji i praksi Hrvatske i europskog dijela Mediterana", HHI - Croatian Hydrographic Institute Split, Split 2007, page 74.

Each of these classifications suggests its own purpose and context for research. Since the marina industry is a part of almost every national economy, its importance is reflected through the facilities it offers on the market. Analysis of the marina industry points to the considerable variations that occur across destinations and the way in which marinas adapt to them. Given that starting point, the varied role of marinas in Europe can be classified as follows:

- marinas that independently develop their potential within their own area (some marinas in Croatia, as well as anchorages and moorings, and Greek marinas)
- marinas whose facilities extend beyond the usual limitations, thus developing and involving the locality (Marina Frapa),
- marinas part of whose attraction is their link with a major urban centre (Split, Dubrovnik, Zadar, Italian marinas on the Adriatic coast, city marinas in Greece),
- marinas that are part of a larger tourist region (Genoa bay, Côte d'Azur, the beginning of the Spanish coast in the Mediterranean),
- marinas that have a sustainable coexistence with industrial and other economic zones (Spanish marinas in the Mediterranean)
- marinas that are linked to wider sports facilities, partly through which they realize their commercial potential (the entire Mediterranean coast, especially Spain).

Given the above classification and the analysis of marina locations which influence the destination and general development, it can be seen that there are two basic models for the influence of marinas on the destination, i.e. locality and region. That effect is associated with the level of development of a destination, and with the strategic development plan for the marina in the destination. Mutual opportunities and interests of the subjects of development meet here. These two models are both worth researching, and so will both be analysed and explained later.



a. Empuriabrava—the biggest marina-city in Europe



b. Marina Frapa, the world's best marina in 2006 and 2007

Source: Internet, <http://www.immocostabrava.com/en> & <http://www.marinafrapa.com/hr>

Fig. 1. Marinas in Europe (Mediterranean)

An analysis derived from experience and related to the investment capital aspect of the marina industry shows that few experts are aware that when building a marina on the Mediterranean (Mediterranean type) the initial price of an unfinished berth is about 20,000€,



while a fully equipped berth can reach a price of 40,000€. Marinas belonging to other markets, particularly fresh water marinas, have significantly lower investment costs, and are generally of lower attractiveness. Through descriptive analysis, the ROI (return on investment) in marinas is seen to be between 6 and 8 years, depending on a number of factors. In developed markets the role of the State is to support growth, while local authorities, together with investors, can build a model of sustainable development. In less developed markets, or economies in transition, development is more difficult and disorganized, which places added burdens on the investment.

**The charter Industry** is connected with the marina industry through berths and the utilization of marina facilities. The business operations of yacht charter companies are specific and complex. There are a number of small companies on the market operating with one or more vessels, but there are also companies operating with thousands of vessels. Charter companies generally offer two alternative packages:

1. Bareboat charter without skipper
10. Vessel charter with skipper.

In addition to these two packages, charter companies sometimes hire skippers through skipper associations that operate independent of the charter companies. It is interesting how the demand for these two types of charter seem to reverse every 5 to 7 years, but retain a ratio of about 3:1. Charter company fleets consist of vessels that can be (1) motor and (2) sailing boats. A yacht charter fleet is formed in various ways, but the most common is through the leasing of private yachts provided by owners for charter companies by virtue of a contract. In such cases of leasing, business tends to be very risky, and small companies are often faced with problems. For example, in Croatia in 1996 the demand for boats fell abruptly due to the state of war in Serbia and Kosovo. Companies with charter fleet acquired through leasing could not meet repayments, so practically overnight the banks became owners of a large charter fleet. This problem has eventually been solved, but not without consequences for the development of the charter industry in Croatia.

Large charter companies operate in attractive tourist destinations, offering a wide range of yachts and services. Demand tends towards larger vessels regardless of whether sail or motor. If we take into account the definition<sup>18</sup> that a yacht is a vessel longer than 12 metres, and mega-yacht longer than 24 metres (80 feet), then there is an increased demand for these types of boats. One advantage of the charter business compared to the marina industry is mobility. Large charter companies can deal with seasonality by moving their fleet from an off-season destination to one where the season is starting. Marinas do not have that possibility. Small charter companies cannot use that strategy of diversification, so they must have other ways to overcome the adverse effects of seasonality. Studies show that on average in 50% of cases charter companies use the services of tourist agencies to rent their vessels.<sup>19</sup> The charter industry business, especially with a fleet on lease, is quite difficult, and there are several important principles and rules derived from experience. For instance, a charter company must have about 10 yachts to keep a maintenance team of 10 workers. Likewise, for a charter

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<sup>18</sup> Definitions generally accepted on the Mediterranean (<http://www.poslovnih.hr>)

<sup>19</sup> Gračan, D. & Zadel, Z. & Rudančić-Lugarić, A.: "Four Stars Charter Quality' in charter service of Croatia", *Naše more, Znanstveni časopis za more i pomorstvo*, Vol. 58. 1-2, 2011. str. 64-73

company to break even, yachts must be rented for at least 10 weeks in a season. Anything below that number means operating at a loss.

Country of Build	No. of Yachts	Country of Build	No. of Yachts
Argentina	7	New Zealand	37
Australia	56	Norway	19
Austria	1	Oman	2
Bahamas	1	Philippines	2
Belgium	5	Poland	11
Brazil	11	Portugal	2
Burma	1	Singapore	3
Canada	78	South Africa	10
China	3	Spain	27
Croatia	1	Sweden	26
Denmark	31	Taiwan	10
Egypt	3	Thailand	5
Fiji	2	Turkey	77
Finland	13	UAE '	1
France	53	UK	171
Germany	145	Ukraine	1
Greece	34	USA	509
Hong Kong	9	USSR	3
Indonesia	5	Yugoslavia	8
Italy	443	Zimbabwe	1
Japan	26	Unknown	29
Malaysia	1		
Mexico	1		
Netherlands	359	TOTAL	2,243

Source: Malcolm Wood, David Robinson: Market report Italy, 2006

Table 2. Number of mega-yachts over 30 metres in 2005 by country of manufacture

In 2010 there were 6,000<sup>20</sup> registered mega-yachts in the world, of which 4,419 were over 30 metres<sup>21</sup> in length. The direct effects of the charter industry in the global market generate an annual turnover of around one billion dollars.<sup>22</sup> Mega-yachts have become a status symbol and their number is constantly increasing. The leading countries involved in mega-yacht building are the USA, Italy and the Netherlands, together accounting for approximately 58%

<sup>20</sup> [http://www.nmsc.gov.au/media/pages\\_media\\_files/files/MS05-Lance%20Cushion%20-%20Superyacht%20Base%20Australia.pdf](http://www.nmsc.gov.au/media/pages_media_files/files/MS05-Lance%20Cushion%20-%20Superyacht%20Base%20Australia.pdf)

<sup>21</sup> <http://www.superyachtintelligence.com/vesselsummary.asp>

<sup>22</sup> <http://www.ezadar.hr/clanak/najam-mega-jahte-i-60000-eura-tjedno>

of the world production of mega-yachts. Although there are no precise statistical data, more than 60% of mega-yachts are owned by charter companies. The price of yacht charter depends on the size and level of equipment of the boat. For example, a one-week charter of a 17-18 metre yacht costs around 20,000€, while it can cost 60,000€ for a 30 metre mega-yacht. The charter of large mega-yachts can reach an amount of 200,000€ per week. Viewed in terms of value, the price of mega-yacht charter is determined by its length and the quality of workmanship and equipment installed. There are two types of luxury yacht manufacturers: (1) those in mass production and (2) those producing on commission. The average price of an 18 metre (60 feet) long motor yacht is 1.2 to 2 million euros, depending on the manufacturer and equipment. Yachts produced in the USA, Scandinavia and Great Britain are particularly known for the quality of workmanship. These yachts of a better quality are more expensive, so that a 21 metre yacht can cost from 2 to 3 million euros, while one of 35 to 37 metres in length can cost from 10 to 22 million euros, depending on the manufacturer. A budget analysis shows that the cost of building a yacht does not generally exceed one third of its final price, which means that this is a very lucrative business. 40 to 60 metre yachts generally cost about one million euros per metre, and there are no restrictions on price for yachts longer than that. In the world of mega-yachts, there is a constant demand for bigger and better equipped yachts. In the list of the largest yachts in the world in 2009, the length range varied from the 162 metre motor yacht *Dubai* to the 65 metre *Wedge Too*, the smallest in this category. Of these hundred yachts in the world, twenty are located in the USA, the largest being 138 metres, and the smallest 48.8. Yachts are dispersed across all continents except Africa. On the Adriatic, the largest mega-yachts generally available for charter are the metres (Benetti Classic 34M) or 29 metres long (Sunseeker Predator). The 54 metres long Seagull II stands out as an exception.

*Skippers and their services* are an important segment in the charter industry options. From the moment the skipper takes the helm he is responsible for the yacht and the people on it. Certified skipper must have experience in all aspects of operating a yacht, must be trained and skilled in navigation and familiar with maritime regulations. The yacht charterers are generally responsible for the itinerary, destination ports, food and other things, although some charter companies offer that as an additional service. An RYA Day Skipper<sup>23</sup> or similar certificate with and a VHF radio licence are generally considered a minimum requirement. Certificates that prove a skipper's competence vary from country to country, making it more difficult to introduce consistency and order in this industry.

The price of a skipper service depends on his qualifications and on the size and value of the yacht he operates. The initial price of skipper with Yacht Master category A licence (for yachts up to 100 GT) is 130€ per day, so the price for a week is about 1,000€. A skipper with Yacht Master Category B licence (yachts up to 500 GT) can negotiate his price per day with the owner or mega yacht charter. Skippers in England command the highest initial price of 200 € per day.<sup>24</sup>

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<sup>23</sup> The RYA was founded in November 1875 as a Yacht Racing Association (YRA). Its primary goal was to standardise the rules determining the measurements of racing boats, so that sailing boats of different classes could compete. The price of membership was then two guineas, and was available for former and current owners of racing yachts of 10 or more tons.

<sup>24</sup> <http://www.vjesnik.hr/Article.aspx?ID=4BC04C74-3D6E-45A6-801B-3CD76F21C4C7>

The successful function of a skipper depends very much on his psychological and personal profile. Not only should he have a thorough knowledge of yacht management, but must also be familiar with the waters he passes through and be able to select appropriate anchorage for the tourists on board, depending on their wishes. The mental qualities of a skipper are key to the success of the charter.

## 4.2 The cruise industry

The cruise industry, in a narrow sense, uses two main instruments (1) cruisers, ships specialised for cruising and trips, and (2) ports that provide berths and are connected to attractive destinations.

Cruise ships, specialised for the transport of passengers/tourists, differ according to the type of service to which they are adapted by their size and construction.

TOURIST CRUISING INDUSTRY			
Secondary activities	MAIN activities		Supporting activities
	Cruisers	Ports	
Shipyards for large cruisers Shipyards for small cruisers Shipyards for old-timer replicas Manufacturers of equipment and special products for cruises and services Others	Cruisers owned by large companies: <i>Large cruisers</i> <i>Small cruisers</i>	Specialised ports for large cruise ships, members of MedCruise  Non-specialised ports for large cruise ships	Specialised tourist agencies Scientific and educational institutions specialised in training Research institutions supporting development Others
	Cruisers owned by small enterprises: <i>Old-timers for one or several day cruises</i> <i>Small cruisers for one or several day cruises</i>	Small ports suitable for small cruisers and local old-timers	
	SUBJECT OF RESEARCH		

Source: The author, Luković T.

Table 3. Basic classification of cruising industry

The cruising tourism industry should be considered in its totality. Manufacturers, without whom the development of the main industry of cruising tourism would be impossible, form secondary or additional activities. Supporting activities make sure that development is successful and with their services they provide assistance.

Cruise ships specialised in passenger/tourist transport differ by the type of service to which they are adapted by their size and construction. In the field of shipbuilding, some shipyards are increasingly oriented and specialized in large and well-equipped cruiser production.

In international waters there are currently about 300 large cruisers which can be classified according to various aspects, but this study will focus on the classification by passenger capacity and quality of service<sup>25</sup>:

<sup>25</sup> Berlitz "Complete Guide to Cruising & Cruise Ships 2006", Douglas Ward, London, 2006, page 154.

- Boutique Ship (50-200 passengers)
- Small Ship (200-500 passengers)
- Mid-Size Ship (500-1.200 passengers)
- Large Resort Ship (1,200-4,000 passengers).

In relation to the quality of service, cruisers can be divided into four categories according to the quality of lifestyle of the passengers:

- Standard: affordable food and services,
- Premium: slightly more expensive and better in quality than the previous category,
- Luxury: more expensive and better in quality than the previous two categories, with a high level of personal comfort and better food, and a crew that is trained to focus on passenger welfare.
- Exclusive: the best service adapted to a passenger's personal needs, with prices in line with the high-quality service.

Increasingly large and more luxurious cruisers compete in terms of capacity and the diversity of their facilities. Concurrent with the development of large cruisers, there is also an increase in the building of smaller luxury ships with a capacity of around 200 passengers. The price of a package directly depends on the number of passengers, i.e. a larger boat means a lower price. Quality of service plays an important role in pricing, so that, for example, the "Green Star", awarded every year in Miami in recognition of quality is highly valued by the cruise companies.

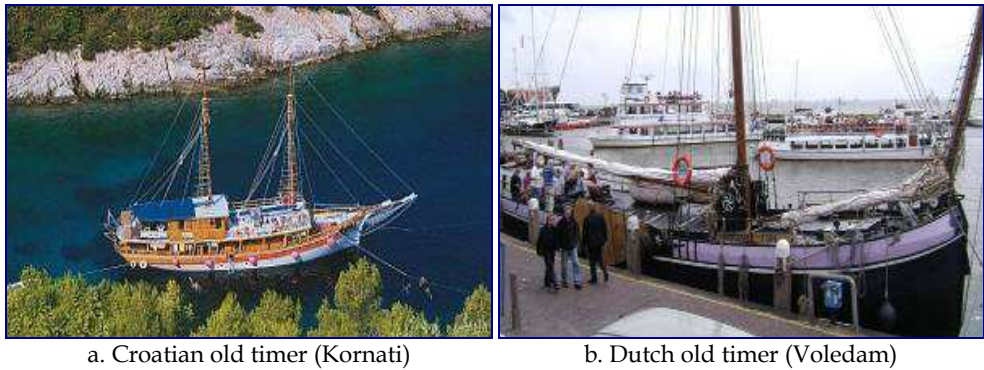
Italian shipyards stand out when it comes to building small luxury cruisers.<sup>26</sup> The production of both large and small cruisers for cruise companies and corporations occurs in a highly competitive market. At the same time, the development of cruising in small traditional craft of local types, usually run as part of a small or family business, is becoming more common and is still an unexplored sub-type of the cruise industry. Everywhere in the world, including Europe, there is an expansion of navigation in local and regional waters, and with it what might be called the *small cruising* business. On the seas, rivers, lakes and canals of Europe we find boats that are a product of a hundred or thousand year old culture and environment of a region. The differences are evident, and it is that diversity that is part of the attraction of cruising in the fresh waters and seas of Europe and worldwide. Traditional Mediterranean boats, from Greece, Italy and Croatia to Spain, France, England and the Netherlands and the countries of Northern Europe, differ widely. In the dictionary of maritime cruising such vessels are often referred to as *old-timers*. Their existence and development are important not only for the growth of small enterprises, but also for the preservation of old and forgotten craft and of traditional local shipbuilding and for the preservation of culture and identity. When the variation in construction and design of the old ships replicas that can be seen in all Mediterranean regions are compared with the similar group of old-timers on the Baltic Sea and European coast of Atlantic, then significant differences are evident.<sup>27</sup> They all, however, have the same purpose which is to supply the

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<sup>26</sup> The main world producer of small cruisers are the Italian Fincantieri, then the Finnish and Aker Finnyards and Kvaerner Masa, the German Meyer Werft and the French Chantiers de l'Atlantique. They are mega-yacht manufacturers and between them built 19 of the 21 mega-yachts built this year.

<sup>27</sup> Luković, T.: "Cruising by old timers, a chance for local and regional development in Europe", the first CRS conference, Bremerhaven, 2009.

market for a cruise with a distinctive attraction. One or several days cruising on an old-timer is a different experience from a cruise on a large or small luxury cruisers.



Source: Taken by the author Luković, summer 2009

Fig. 2. Traditional regional cruisers (old-timers) in Europe

In addition to the old boats and their replicas (old-timers), many small and medium family enterprises augment their cruising fleet with small cruisers of a more modern type, and thus become a noteworthy competition to the larger cruising companies. Recognizing the potential for development of the small cruiser market, many larger companies are developing a fleet of new, luxury small cruisers. Some studies<sup>28</sup> indicate that in the small cruiser business the fleet and ship capacities are very important, but insufficiently explored, while globally such fleets exceeds the number of 10,000 traditional old cruisers. In general, competition in the cruise ship market becomes more and more dynamic, and new forms of offer become more evident.

Besides large and small cruisers on the European seas, cruising with specialized freshwater cruisers of all sizes is also very important. The largest cruisers on the navigable rivers of Europe exceed 1,500 passengers. Freshwater, like sea cruising, has a supranational character, meaning that some international investors have cruisers sailing on European rivers. Unlike sea cruising, large freshwater cruising is organized and led by such large tourist agencies as TUI. The European Union, as a single market without borders, functions well in the case of river cruising, as European borders are frequently crossed. Such routes pass through Germany (Regensburg - Straubing - Windor - Passau), Austria (Linz - Wachau - Vienna), Hungary, Romania and the port of Salina where the Danube flows into the Black Sea. River and lake cruises are organized as either a one day tour, or as several days cruising, with an average price of 138€ per day<sup>29</sup> per person, full board. River cruising in Europe is a highly developed form of tourism, with the tourist companies and crew providing plenty of entertainment and excursions to distinctive destinations during the cruise. In terms of cruising, the busiest navigable rivers are the Danube, Elbe, Weser, Rhine and Main and another.

<sup>28</sup> Luković, T. *ibid*

<sup>29</sup> <http://river-cruise-fleet.com> & <http://www.danube-river.org>

However, a key aspect of this subject remained relatively neglected; that is the destination ports for cruise ships. The tourist cruising business could not exist without such suitable ports.

The ports, after the ships themselves, are the second most important factor in cruising. Ports can be classified as:

1. ports specialised for the accommodation of large cruisers, and
11. (2) ports that are not specialised for large cruisers.

*Ports specialised for cruise ships* stand out for their efficient organization, and have the role of connecting the passengers/tourists with attractive local destinations. Some non-specialised ports for cruise ships do not recognise this form of tourism as an opportunity for growth, while some other ports are very specifically prepared for and focused on cruising. Specialised ports support the development of destination management for which cruising is an important tourist activity. These ports are a result of an orientation towards tourism of a destination and its management. Such ports have several characteristics:

- They gradually “push out” the traditional traffic of passengers from the high-quality areas in the port where liners and other types of ships for cargo and passenger transport previously docked. Passenger transport gives way to the more profitable cruise business,
- Frequent and large-scale investments in port facilities, whether in the port itself or its vicinity
- In the area of the port under customs and police control there can be additional attractions aimed at cruise passengers,
- Tourist agencies have an important function in terms of their provision of opportunities for tourists on a cruise; such provision is generally related to the transport of passengers from cruisers to attractive local destinations,
- Many activities at the locality are focused on the development of products and services for this kind of tourism,

World (2008)				Mediterranean (2009)		
	Ports	passengers	calls		Ports	passengers
1	Consumet	2,569,000	1.008	1	Naples	1,154,742
2	St. Thomas (USV)	1,847,000	730	2	Civitavecchia	1,082,487
3	Grand Cayman	1,553,000	570	3	Barcelona	971,226
4	Nassau	1,472,000	687	4	Dubrovnik	901,389
5	St. Maarten	1,346,000	619	5	Balearic Islands	789,509
6	Naples	1,237,000	660	6	Livorno	754,965
7	Juneau	1,024,000	620	7	Tunisian Ports	752,246
8	Ketchikan	942,000	502	8	French Riviera ports	707,929
9	Livorno	849,000	565	9	Marseille	456,000
10	Dubrovnik	844,000	698	10	Madeira Ports	425,433

Source: The new MedCruise Statistical Reports, 2010 Edition

Table 4. Top-10 largest world's and Mediterranean ports specialised for big cruise ships (2008 and 2009)

*Non-specialised ports* for large and small cruisers offer mooring facilities, but all other services are only sporadically organized and depend on what is available at the destination. Reasons for that are numerous and range from the existence of some other locally important activity for the destination to the lack of attraction of the destination. Hence, we notice that the port is a reflection of a destination and it directly relies on it.

The main objective of the cruise business is the same as for all other businesses, profit. As market competition is becoming stronger, various strategic alliances are formed in order to enhance business results. An example of a large, very successful and well organized strategic alliance of cruise companies is “Carnival UK” (<http://www.carnivalukgroup.com>) which manages 98 large cruise ships.



a. Cruise passengers try to enter the Old Town of Dubrovnik



b. MSC cruiser in the port of Venice

Source: Internet

Fig. 3. Problems in the cruising season

While cruise companies and strategic alliances fight for better business results, passengers, with their personal motives for travelling, are gradually losing their significance as individuals in the cruising industry, which is becoming a form of mass tourism. Companies, often aggressively, try to restrict the passengers' consumption to what is available on board. Thus the destination, as a primary motive for travelling, is slowly losing its importance. As cruise companies do business in direct competition with each other, it is not only the passengers that become less important, but the destinations also become subordinated to the company profits. At the same time, realizing the developmental and financial possibilities introduced by cruising, ports connected to high-quality destinations develop rapidly and expand facilities that can be offered at both port and destination. Their development is mostly based on financial potential and interests, and is rarely connected to the investments of the big cruise companies. Nevertheless, the development of specialised cruise ship ports, together with the recession, has provoked a new way of thinking and initiated new forms of cooperation and strategic alliances. In particular, as a result of passenger dissatisfaction with the reduced opportunities to experience the destination<sup>30</sup>, newly organizational forms of

<sup>30</sup> Luković, T. & Božić Fredotović, K.: “Cruiser bids and offers cruise destinations in the competitive or partnership?”, Third international conference, Cruise Research Society, ICC3, Dubrovnik, 2011



collaboration between port, destination and cruiser<sup>31</sup> have begun to emerge. This leads to a gradual introduction of some basic elements of successful business cooperation where the satisfaction of the passenger/tourist once more becomes the main priority. Port and destination on the one hand, and the cruise ship on the other, are the places where passengers spend money, and it is in their mutual interest to encourage satisfaction in tourists who are then more likely to return.

The development of cruising in Europe is supported by four international organizations: (1) European Cruise Council, (2) Cruise Europe, (3) MedCruise, and (4) Euroyards.

1. The *European Cruise Council* (ECC), based in Brussels (Belgium), is an association of leading European cruise companies with 30 permanent and 34 associate members. The ECC is the counterpart of the similar American Cruise Line Industry Association (CLIA) which is partly responsible for the high degree of development of the cruise industry in the Central American market<sup>32</sup>. The ECC promotes the interests of all cruise operators and collaborates with EU institutions such as the European Commission, the European Parliament, the Council of the EU and their permanent representatives. The ECC also cooperates with the European Maritime Safety Agency (EMSA). The ECC protects the interests of its members through its close connections with other European bodies such as: the European Community Shipowners' Associations (ECSA), the European Sea Ports Organisation (ESPO), and the European Travel Agents and Tour Operators Association (ECTAA). The ECC also promotes the development of the European cruising industry through cooperation with a number of regional bodies, such as Cruise Baltic, Cruise Europe, Cruise Norway and MedCruise.
2. *Cruise Europe*, based in Stryn (Norway), is an association of cruise ship ports in Northern and Western Europe. It is focused on future development and supports and sets standards for the quality of ports by networking between them and conducting research for its members.
3. *MedCruise*, based in Barcelona (Spain), was founded in Rome in 1996, and it acts as an association of Mediterranean ports specialised for cruise ships. It numbers 55 members with 78 Mediterranean ports, including those in the Black and Red Seas, as well as the ports of the so-called Middle Atlantic. The association has 20 associate members, tourist boards, port agents, and other cruise industry bodies. In such a way the field of interest and work of MedCruise extends to the entire cruising industry. MedCruise is working to increase the efficiency of the cruising industry, and to build sustainable relations between cruising industry bodies and to promote its development.
4. *Euroyards*, based in Brussels (Belgium), is an association which gathers leading builders of cruise ships, off-shore and specialized vessels, yachts, ferries, chemical tankers, and specialized cargo ships. Its members employ about 50,000 workers and annually generate a 13 billion euro turnover. All Euroyards shipyards are members of the Community of European Shipyards Associations (CESA).

The cruising industry, in terms of ports specialized for small cruisers and large cruise ships owned by big companies, is very well organized and has been described as "The Cruise

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<sup>31</sup> Luković, T. & Božić Fredotović, K.: "Seasonality – factor of crisis or development in cruise tourism.", Second international conference, Cruise Research Society, ICC2, Plymouth, 2010

<sup>32</sup> Ross K. Dowling: "Cruise ship tourism", Cowan University, Australia, CABI, 2006, page 4.

industry, leader in Europe's economic recovery".<sup>33</sup> By contrast, the industry of small private cruisers and ports is relatively lacking in organisation and still underdeveloped. It is an area that offers considerable scope for further research and development.

## 5. The regional concept of sustainable development and the role of nautical tourism

After the abolition of borders between European countries and the creation of a single market in the EU, the opportunity was created for new models of economic growth of industries and for their unification on a larger scale. That pointed to a new European concept of growth with a prevailing regional market approach. Such a concept, particularly related to general tourism, and thus specifically to nautical tourism, promoted the idea of a destination whose development should be planned and managed. As a result, a new importance was given to destination management, which, in the developed European economies, is an aspect of a decentralized self-governing system of growth. In so doing, the state transfers its authority to lower levels of management, which tends to encourage market-oriented development. That concept is based on the fact that local and regional authorities are more aware than centralised government can be of the particular requirements for development of their market. That concept of strengthening regional and local self-governing requires a developed, functional, and stimulating model of sustainable development. The main bodies, and their responsibility in connecting the varied interests of all parties of the destination, are far more transparently apparent in that model. In this manner, in particular in nautical tourism, visiting sailors and tourists are in the spotlight, which is crucial for a market-oriented development.

The model of sustainable development (Figure 5) shows a case where a marina is a leader of local development, as is quite common in the Mediterranean region<sup>34</sup>. In the sustainable development model, whose role is to support and integrate ecological and ethical (social and economic) aspects, good communication is a key to success, and it takes place in the context of the rule of law and the personal competencies of the entities.

As previously explained, indirect effects of nautical tourism on regional economic development are considerable, and economic analysis confirms that they are generally much greater than the direct effects. Seen from a macro aspect, nautical tourism contributes to the overall economic development in two ways:

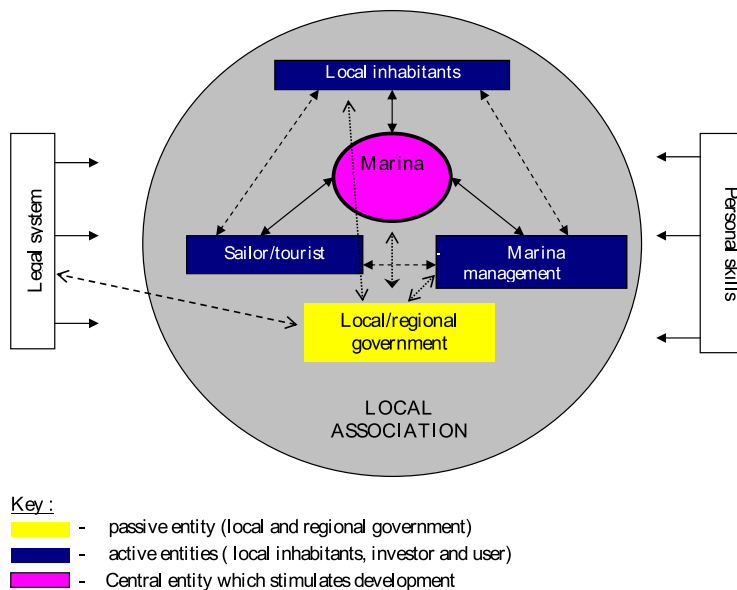
1. the development of nautical tourism being greater than the general rate of economic growth, a relatively significant impact on that general rate is achieved. In that case, nautical tourism encourages economic development, i.e. its faster growth.
2. the development of nautical tourism affects not only the rapid development of existing activities in a country or region, but also the growth of new activities that are horizontally (excursions, underwater photo safari, customer service etc.) or vertically (small enterprises, shipbuilding etc.) associated with it. In this way, a significant number local inhabitants are employed in various sectors, and their direct or indirect goal is to serve the visiting tourists. Frequently the number of local people employed in

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<sup>33</sup> <http://www.cruise-norway.no/viewfile.aspx?id=3186>

<sup>34</sup> Model explained in Section 4.1.

this way is many times greater than those employed directly in the nautical tourist industry. That kind of development is particularly crucial to the economy of the islands in all the seas of Europe, and particularly for the preservation of the island way of life.



Source: T. Luković<sup>35</sup>

Fig. 4. Separate and common competencies of the main entities in a model of sustainable development, exemplified by a marina as a leader in local development

A regional concept of the contribution of nautical tourism to the economic development on the mega European level should be viewed in the context of market distribution, and thereby receptive and emitting markets should be distinguished. One of the chief characteristics of such approach is a national framework of GDP, i.e. the specific GDP from tourism. In the *receptive tourist market* economies, GDP exceeds 4% in the economic structure and even reaches an amount in excess of 10%, while in the *emitting tourist economies* it does not exceed 4%. That indicator is variable and has a national character as for big markets, such as the emitting German market, the absolute size of the GDP from tourism far exceeds the same in smaller economies of the receptive tourist market. Nevertheless, this indicator should be taken into consideration.

Since the receptive markets are very active, and they meet all four characteristics of active markets<sup>36</sup>, they are a potential opportunity for the realization of market demand, and therefore should be studied. In this context, nautical tourism plays an important role in all economies that are receptively oriented. That role is manifested in three ways:

<sup>35</sup> Luković, T. & Gržetić Z.: "Nautičko turističko tržište u teoriji i praksi Hrvatske i europskog dijela Mediterana", HHI Split, Split 2007, page 123.

<sup>36</sup> Four conditions of an active market: demand, ability to pay, willingness to consume and free time for consumption.

- *Nautical tourism, from the perspective of a receptive country*, is an important source of currency inflow. It is considered to be a specific form of export (a so-called invisible export). All the money foreign visitors spend in a country contributes to the balance of payments of the host country. Currency inflow from tourism is particularly important for developing countries, i.e. countries in transition. Some countries, like Croatia, have developed nautical tourism to the extent that they can compete on the competitive international market. In order to achieve better results, most of receptive tourist countries in Europe offer state subsidies which encourage investments in facilities intended for tourist services. These are implemented through various reliefs, grants, benefits, low interest rates and other measures. Still, the real effects come through new investments in the nautical tourism industry which is highly profitable, but unexplored.
- *Nautical tourism, seen from a social point of view*, facilitates the intermingling of nations and the transfer of information, knowledge, culture and lifestyle. In fact, nautical tourism makes a considerable contribution as foreign tourists and their equipment, such as cameras, attract the interest of local inhabitants, which can initiate some level of cultural interchange of ideas. The impact of tourism in general, and nautical tourism in particular, on the overall development of a certain area or country in a social sense is reflected in the interests and education of young people. That factor of social and economic development is immeasurable, but at its best is certainly a significant factor in the process of social change.
- The *multiplying* effect of tourism should not be neglected: it results from the fact that money spent by tourists does not remain in the place of consumption, but continues to circulate and have a chain effect on economic events. Accordingly, money circulates on the national and supra-national level within an entire economy, flowing from one business to the other, from industry to industry, and the more it circulates the bigger are its economic effects. According to studies in the U.S. economy, a dollar invested in tourism effectively multiplies by a factor of 4.2. In Croatia, the multiplier is 3.2, meaning that the income from foreign tourists is effectively multiplied by a factor of 3.2 in the total economy. A similar effect applies in all receptive European countries.

Consequently the European concept of regional development is fully justified, especially in the context of tourism and nautical tourism, and the outcomes are a result of the political and economic market-oriented concept of the European Union. However, the real effects are yet to be observed since the EU, as a single market, is only just beginning to take shape and there are still huge differences between the European national economies of East and West. Still, these discrepancies confirm the hypothesis about the development possibilities in Europe when observed through the economic theory<sup>37</sup> by which differences in the level of development between countries can be positive and stimulating because they provide new opportunities and thus stimulate growth and the flow of investment to the less developed economy.

## 6. Nautical and tourist markets in Europe

The nautical and tourist market of Europe represent a range of differences in terms of the factors that are shaping it. In that context the differences in terms of climate, culture and tradition have special importance.

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<sup>37</sup> Thurow, C. Lester: "The Future of Capitalism", William Morrow and Company, Inc, New York, 1996, where this is called a theory of *punctuated equilibrium*.

It is appropriate to use the classification of the five major markets in Europe for the study of nautical tourism:

1. The Mediterranean
2. European Atlantic Coast
3. Baltic Sea and Arctic
4. European Lakes and Inland Waterways
5. The Black Sea

Once again, it must be stated that data on nautical tourism are scarce, so all available sources should be used to the maximum.

In the marina industry, Europe has something to boast about. Spain has Empuriabrava on the Costa di Sol, the largest marina-city (over 5000 berths) in Europe. France has the 5-star Port Camargue with 5,010 berths, the highest quality marine, specifically recognised by the ADAC. Italy has the highest number of marinas in the Mediterranean. Greece has the greatest potential for development in nautical tourism considering the length of its indented coast and islands. Dutch marinas and waterways are located below sea level. Marinas in England are among the best of European marina systems. Germany has a number of marinas inland and the on the coast of north Europe. Norway has the highest number of marinas in Europe, and also the most ice-covered marinas. Croatia has the marina Frapa in Rogoznica, the world's best marina in 2006 and 2007. The fact is that there are a lot of reasons for European nautical tourism to be thoroughly studied, so that the quality and achievement of its market diversity could be transparently presented on the global demand market.

### 6.1 The Mediterranean

Nautical tourism in the Mediterranean is highly dynamic and developed. *The marina industry* has been developed through a number of marinas, tourist organizations, and all other participants in the industry. The mild Mediterranean climate gives, especially for tourists from the cold North of Europe, the opportunity to go on vacation almost all year round, though the summer season remains particularly popular, so that Mediterranean nautical tourism still has a very strong seasonal character.

Given the scarcity of data on the number of categorized high-quality marinas in the Mediterranean and Europe, we will use the ADAC and other sources. The average size of a marina, in terms of berth number, is 430 berths per marina.

In the Mediterranean there are over 1,000 marinas of all kinds, such as sports marinas, private, and commercial.

*The charter industry* can only be estimated from the fact that in the Mediterranean, charter companies have thousands of boats and yachts and approximately 500 mega yachts. Skippers, as active participants in the charter business, have their associations and guilds in some Mediterranean countries, and their activity is therefore gradually acquiring a legal framework.

The Mediterranean *cruise industry* stands out in terms of ports for tourists from cruise ships, i.e. in relation to high-quality destinations that attract tourists from around the world. Cruisers under all flags sail into the Mediterranean ports, but the Italian Costa company stands out as a local Mediterranean cruise company. Small and traditional cruising is a developed and important segment of small business growth in the Mediterranean coastal area.

1	Marinas & Berths	France (46)	Greece (37)	Croatia (47)	Italy			Spain			Turkey (26)	Malta (4)	Montenegro (3)	Slovenia (3)	Total Mediterranean (398)
					Mediterranean coast (44)	Adriatic coast (71)	Islands (53)	TOTAL (148)	Mediterranean (59)	Malorca & Ibiza (25)					
2	0-100	1	19	4	7	4	18	1	4	5	1	2	1	56	
3	101-500	18	15	38	24	53	100	33	13	46	2	0	0	236	
4	501-1000	17	2	4	10	8	23	17	8	25	3	1	2	78	
5	1001-2000	6	1	1	3	3	7	8	0	8	1	0	0	24	
6	2001-5000	3	0	0	0	0	0	0	0	0	0	0	0	3	
7	> 5001	1	0	0	0	0	0	0	0	0	0	0	0	1	
8	Berth total*	41,845	6,642	13,416	17,752	2,448	11,635	53,835	33,535	9,806	43,341	837	1,108	1,475	171,158

Source: The author T. Luković with reference to ADAC.

Table 5. Marinas on the Mediterranean

## 6.2 The European Atlantic coast

The European Atlantic coast is exposed to strong winds and waves, with tides that can vary in the range of over 8 metres. Under these conditions, ports and marinas are built within a strong breakwater system that protects the port from the sea. Consequently, marinas, as well as berths, are constructed in a special way, so the term "Atlantic marinas" is used in the specialized dictionary of nautical tourism.

In this region, nautical tourism is very well developed in spite of the climate, which is a consequence of the high degree of development of countries in this part of Europe.

In relation to the number of marinas and given the climatic conditions, it may seem surprising that there are 486 high category marinas in this part of Europe, as stated by the ADAC. The total capacity of these 486 marinas is 168,408 berths. The average size of marina on that market is 346.5 berths.

*The charter* business functions in the context of marinas, and is most highly developed in the central and southern regions of this market.

*Cruising* on large cruise ships is somewhat less developed compared to the Mediterranean, but the English market is a leader regarding educational centres and universities specialised for the training of cruise staff (Plymouth, Southampton etc.). Small, local cruising business functions in accordance with climatic and other conditions.

Marinas & Berths	Belgium (19)	Denmark (116)	England* (36)	France (79)	Netherlands (120)	Germany (40)	Portugal (21)	Spain (26)	Sweden (29)	TOTAL European Atlantic (486)
0-100	8	23	5	5	33	26	2	3	7	112
101-500	9	71	25	32	69	14	16	16	15	267
501-1000	2	22	4	27	16	0	3	6	5	85
1001-2000	0	0	2	13	2	0	0	1	2	20
2001-5000	0	0	0	2	0	0	0	0	0	2
> 5001	0	0	0	0	0	0	0	0	0	0
Berth total*	4,781	33,282	12,723	51,127	36,151	4,093	6,770	10,344	9,137	168,408

Note:

\* For England we only have data from ADAC which applies only to marinas on The English Channel

Source: the author T. Luković with reference to ADAC.

Table 6. European Atlantic coast

## 6.3 The Baltic Sea and the Arctic

Nautical tourism in the Baltic and Arctic has been developed in a special climatic environment. Countries in that area have the world's highest living standard, which is reflected in the level of development of nautical tourism.



a. Ice-covered marina, Finland



b. Cruise port and marina Warnemuende (Germany)

Source: the author Luković, T.

Fig. 5. Baltic marinas

	Marinas & Berths	Germany (127)	Poland (14)	Sweden (61)	TOTAL (202)
1	0-100	57	10	37	104
2	101-500	64	4	24	92
3	501-1000	5	0	0	5
4	1001-2000	1	0	0	1
5	2001-5000	0	0	0	0
6	> 5001	0	0	0	0
7	Berth total*	24,525	1,198	7,297	33,022

Note:

\* ADAC has not incorporated marinas of some Baltic and Arctic countries; we will therefore complete this classification with marinas regardless of their quality:

Russia - no data

Lithuania - 5

Latvia - 29

Estonia - 91

Finland - 155

Norway - 963

Source: the author T. Luković with reference to ADAC.

Table 7. Baltic and Arctic\*

The brevity of the summer and sailing season has led to a small number of high-quality commercial and well-equipped marinas. These marinas are functional and intensively used in summer, but ice-covered in winter. According to ADAC, the average size of a high quality commercial marina is 163.5 berths, which is a relatively small number for Europe. Nevertheless, sailing in Scandinavian countries is very well developed, and the number of boats is almost equal to the number of inhabitants, which is an understandable consequence of the local lifestyle and tradition.

*Chartering* is relatively underdeveloped and seasonal.

*Cruising* is highly developed in terms of both ports for large cruise ships and major cruising companies which operate in all markets of the world.



#### 6.4 European lakes and inland waterways

The market of continental nautical tourism in Europe is represented by the supply and demand on the freshwater areas, rivers, lakes and canals. All types of nautical tourism are equally developed, i.e. marinas and cruising are the focus.

As a rule, and almost without exceptions, marinas are organised as clubs, with evident commercialization. They are located in all European countries, but a significant number of countries lack transparent marina statistics. Such countries are Slovakia, the Czech Republic, Hungary, Romania, Moldova, Ukraine, Belarus, Bulgaria, and countries of the eastern Balkans. So the data used in this study give only a vague hint of the real importance of nautical tourism in continental Europe; in other words, they analyze only the western European market. Despite that incomplete data, 623 continental marinas indicate that the largest number of high-quality marinas in Europe is located here. At the same time, the fact that the average capacity of a marina on the continent is 94.6 berths suggests there is room for future development.

*Chartering* is not developed so much because sailors tend to have their own boats; only marinas connected to tourist camps or bigger places offer charters. Almost always it is a one-day charter.



a. Cruisers departing from the port Passau



b. Marina and cruise port Roebel (Germany)

Source: taken by the author Luković, T.

Fig. 6. Continental nautical tourism in Europe Table 7. Marinas on the largest rivers, lakes and channels in Europe\*

*Cruising* is developed and takes place on all European navigable waterways. The Danube, Elbe and Main are suitable for navigation, so multi-day cruises are more widespread. The fact that Europe abounds with beautiful and historically important destinations makes it ideal for the development of the cruise industry, so it can be said that continental cruising has an international character. Very often, big cruise ships are in the hands of international capital and companies. Large and medium-sized cruise ships offer multi-day cruises throughout the elite destinations of continental Europe, such as Vienna, Budapest, etc. As far as cruise management is concerned, it is important to emphasize one feature typical for the European continent. International sources of capital and owners come from various countries but, with mutual interests regarding capital, are willing to invest in the construction and purchase of cruisers, and they do not do business alone, but make considerable use of travel agencies. TUI agency is specialised for this and it manages most of the large and medium-sized cruise ships operating on the waterways of Europe.



## 6.5 The Black Sea coast

As with to the countries of Central and Eastern Europe, there are no data for the Black sea market. It is a known fact that the Black Sea has highly developed general, as well as nautical, tourism, but unfortunately there are no available data. However, that is not a reason not to mention it and thus suggest room for future studies.

## 7. Development possibilities – Research of demand and specificities of development

Market-oriented research implies a study of supply and demand, its level of development and dynamics of movement, as well as other market characteristics. The previous section dealt with supply in the market of nautical tourism, so in order to have a complete market analysis, it is necessary to look also into the demand.

Demand is clearly a significant factor and worth quantifying since it determines the opportunities to which suppliers can adapt. Although mostly spontaneously, at least in the marina industry, supply has successfully adapted to demand though it is generally the case that demand still exceeds supply. If analysed from the aspect of economic development, it means that there is room for new investments in the field of supply.

### 7.1 Demand as a growth factor

In respect of the market, potential for growth of any industry, including nautical tourism, depend on market trends, i.e. on the demand to which supply should be adjusted. In assessing the potential for development, it is necessary to analyse both the supply and the demand. The basic characteristics of supply are presented and quantified in Section 6, while the demand requires further analysis for an assessment of the market. Studies are scarce in the field of analysis of demand, though studies by some European institutes contribute to the knowledge of demand. In Europe there are periodic studies conducted by: the Institute for Tourism in Madrid, the Institute in Bonn, *dwif* consulting GmbH Berlin, and occasionally universities for their state or county, such as the Welsh Enterprise Institute at the University of Glamorgan Business School. Valuable research, such as that by TOMAS-nautical science and TOMAS-cruising, carried out every 2 to 3 years by the Institute for Tourism in Zagreb, should be added to those mentioned above. TOMAS<sup>38</sup> studies of demand in nautical tourism can be found on the websites<sup>39</sup>.

Due to the continuous 30-year-long research in nautical tourism carried out by the Institute for Tourism in Zagreb, it is possible to form some conclusions on the growth of demand in nautical tourism and on the potential supply that adjusts to it. Regarding the results of the demand analysis, and taking into account the fact that in the last 30 years the average annual growth rate of all types of nautical tourism has exceeded 10%, along with the fact that general tourism has shown no signs of “industry fatigue”, further growth of marina and cruise industry is to be expected.

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<sup>38</sup> Detailed characteristics of the demand in nautical tourism can be seen on these links.

<sup>39</sup> [http://www.iztg.hr/UserFiles/Pdf/Tomas/2007\\_TOMAS-Nautika\\_2007.pdf](http://www.iztg.hr/UserFiles/Pdf/Tomas/2007_TOMAS-Nautika_2007.pdf) & <http://www.mint.hr/UserDocsImages/TOMAS2006-cruising.pdf>

## 7.2 Models of development of the growth of nautical tourism and its role in the economy of Europe

The question is: *How does the development of nautical tourism affect economic growth in the European economic circumstances?* In practice, there are two basic models of development that have been recorded, studied and quantified in theory:

- Model a. – in this model the marina has no role in development. The marina is just one product of a spectrum of tourism facilities that is stronger in capital and to which it is subjected. This model can be found on the Cote d’Azur, e.g. Nice, which is saturated with tourist facilities. In this model, marinas, charter and cruising serve only to complement a stronger market, chiefly comprising hotels.
- Model b. – a marina, or cruise port, acts as a leader in the economic development of the locality or region. This model is widely present in the Mediterranean, but also on all the coasts of Europe. The influence of a marina is crucial in the less-developed areas, and, as in concentric circles, it becomes a centre of extended development. Examples of this model is can be found throughout the Mediterranean, but also in the Baltic, where cruising and marinas have become leaders of development in tourism and the economy in general.

The first model functions throughout Europe, though particularly in the Mediterranean, wherever a marina is located near a large city. Being a part of the city environment, there is no need for the marina to develop additional facilities of its own because everything is already available in the city. There is only one example where a marina ‘conquered’ an already developed tourist destination, and achieved a scale that dominates the local tourism environment. That is the Spanish marina ‘Empuriabrava’ on the Costa Brava which is a project of the Immo-Center Group company. The impact of Empuriabrava is such that the city and destination have completely surrendered to its influence, and it has become a symbol of a whole lifestyle and business in this part of Europe.



a. marina Baia Des Anges (Nice), operating in conjunction with the hotel complex



b. Marina Frapa (Rogoznica) as a local leader

Source: the author Luković, T.

Fig. 7. Models of the role marinas play in the economic development in Europe

The second model, where marina or cruise port is an initiating factor the development of the area, is interesting because of the perspective it offers on growth potential in a time of

economic crisis and efforts to find the way out of it. That model developed spontaneously, under the influence of the market, but many European economies have not yet recognized it, so it remains as a potential source of future development. If we consider the European model of regional and local development, where the planning and support for development is transferred from the state to local and regional government, then the marina phenomenon should be studied as a clear example of the theory being put into effective practice.

The second model is particularly relevant to strategies of future development in Europe, on the grounds that such development takes a significant role in the promotion of regional development in a way that can be of central interest to local and regional government. An opportunity is thus provided for a strategy of diversification that can extend to the macro-economic level of development with an obvious positive potential.

### **7.3 How to get to the top in nautical tourism within 10 years time**

All investors are looking at the relevant calculation of ROI (return on investment) before investing, and wondering when and how they might recover the invested capital.

In a time of global crisis, with a surplus of money in the market of financial capital, the investment risks have become too great. All this has resulted in an increase of interest on investment, and investment has almost stopped. But is the crisis the reason for the lack of investments? The crisis actually offers new opportunities for development in the eyes of a truly visionary manager. The question is *where to invest the significant capital?* Given the situation on the market and according to the predictions of analysts familiar with the situation in nautical tourism, the answer is: *"Immediately invest in nautical tourism."* Someone might say that such an answer is frivolous, but it is valid and justified. Still, we should put that argument aside for potential investors who are willing to pay good money for a serious explanation of ROI and for the management of investments in nautical tourism.

Here we will offer a good example of how a visionary with a good idea can reach the top in spite of numerous obstacles, such as an economy in transition, a country at war, a global crisis, a bad reputation of the country on the international stage, general disorder in the country, a lack of staff, the isolation of the destination, and so on. Common sense would suggest that success in such a context would be only a utopian ideal, but practical reality has demonstrated the opposite, and thus reflects and confirms the development strength of nautical tourism.

#### **The example of the marina Frapa (Rogoznica, Croatia)**

The owner of the marina, Mr. Franjo Pašalić came to Croatia during the war in 1992. Several years later he invested in the construction of the marina in the almost abandoned locality of Rogoznica, near Šibenik (Croatia). An artificial island was constructed together with the first pontoons which in 1996 accommodated the first yachts in an unfinished marina. Using only reinvested income the marina has developed over the past 10 years and now offers substantial and attractive facilities for visiting sailors. Strategically, the marina has focused on the elite global demand market and today offers facilities of the highest quality. The question is what happened to the destination and the marina over the 10 years of its existence in Rogoznica?

Development indicators	Before the marina (Year 1996)	Marina in business (Year 2005)
Local population	350	over 2,000
Average age of the population	over 70	about 40
No. of employees	30	800
No. of small and medium-sized companies	10	100
Price of land (per m <sup>2</sup> )	€ 10 - 20	€ 150 - 300
No. of restaurants	1	8
No. of cafes	2	15
No. of shops	2	9
No. of exchange offices	0	2
No. of medical centres	0	4
Primary schools	0	2
Natural resources preservation (ecology)	preserved	preserved

Source: research by the author Luković, T.

Table 9. 10 years of marina Frapa in Rogoznica

Although it is hard to believe that in 10 years the life of a practically dead locality can be revived and raised to a high level, nevertheless it has happened here. Maybe it also occurs, if a bit less dramatically, in all localities where a marina or cruise port becomes an economic and development leader. All the local inhabitants are employed, and the destination is generally being rapidly developed.

Marina Frapa has the role of a leader and is a moving force in the development of Rogoznica. Thanks to the marina local development has been dramatically boosted. The scale and quality of the marina initiated the development of the destination, and the Frapa marina has reached the top in the quality of service it offers. As confirmation of these claims, it is worth noting that in 2006, at the world marina contest in Madrid, between 300 marinas from 60 countries, Frapa received the award of the best marina in 2006. The same happened the next year in Switzerland. The organizers then changed the statute so that the award could not go to the same marina three times (!)

This example illustrates how in completely adverse conditions and in a time of global crisis nautical tourism can open up the possibility of genuine economic success.

A similar situation can be seen in Dubrovnik, a town of about 40,000 inhabitants. The cruise port of Gruž (Dubrovnik) is the 10<sup>th</sup> port in the world in terms of the number of cruise passengers, and the 3<sup>rd</sup> in the Mediterranean. Due to the developed of cruising, the inhabitants of Dubrovnik have safer jobs and security of livelihood.

This model is present at all places where nautical tourism has been developed, particularly where it is associated with a noteworthy tourist destination. Europe abounds in good destinations, not only on the coasts, but also inland, which indicates the still insufficiently explored development opportunities.

## 8. Conclusion

In this time of global financial and economic crisis, development in all industries, especially when seen in terms of new investments, has effectively halted. Reluctance to invest and a general lack of confidence have spread to investors, managers and commercial banks. The crisis of ideas and uncertainty over invested capital, along with the increasing challenges that management has to face but cannot adequately respond to, has shaken the global economy. Europe, which has tried to unite its economy and develop its own economic model right from the earliest stage of its unification, is facing serious difficulties and there is as yet no light at the end of the tunnel.

But is everything so negative?

The fact is that every crisis presents new opportunities for development; but it is a fact that has to be recognized and taken advantage of. The industry of nautical tourism has resisted the negative effects of crisis and maintained a rising trend of development. Certainly, changes occur in nautical tourism; for instance trips have become shorter, though more frequent. The capacities of yachts, marinas, cruisers, ports and attractive destinations are being used in better ways, and the demand for "value for money" has become more crucial.

What is currently on offer in nautical tourism meets all these demands, and ensures its development. At the same time, there is still considerable space for investment in marinas, the charter business and cruising throughout Europe, and such investment is capable of realising significant returns that is not dependant on exceptional management. The areas of nautical tourism, particularly marinas and ports for large cruise ships, support an emerging European model of sustainable regional development, in which they can take the role of local and regional leader.

Thus nautical tourism demonstrates that this could be seen as much as a crisis of ideas as a real economic crisis. There are two key entities with solutions to offer: visionary investors and managers. The demands they have to face are these: to know more, to learn more, to study more, to see further and better than others, and to develop trust and confidence with hard work. The cognitive skills of investors and managers, together with education, are a response to the crisis and the only way in which solutions to it can be found.

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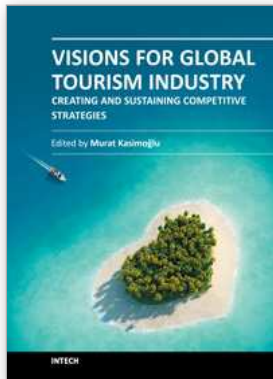
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## **Visions for Global Tourism Industry - Creating and Sustaining Competitive Strategies**

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We have been witnessing huge competition among the organisations in the business world. Companies, NGO's and governments are looking for innovative ways to compete in the global tourism market. In the classical literature of business the main purpose is to make a profit. However, if purpose only focus on the profit it will not be easy for them to achieve. Nowadays, it is more important for organisations to discover how to create a strong strategy in order to be more competitive in the marketplace. Increasingly, organisations have been using innovative approaches to strengthen their position. Innovative working enables organisations to make their position much more competitive and being much more value-orientated in the global tourism industry. In this book, we are pleased to present many papers from all over the world that discuss the impact of tourism business strategies from innovative perspectives. This book also will help practitioners and academicians to extend their vision in the light of scientific approaches.

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