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An Overview of Yachting Tourism and Its Role in the Development of Coastal Areas of Croatia

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Abstract

The economic growth, which took place in the last 3 decades in Europe, helped for yachting tourism to be placed as a considerable option for holidays. Croatia has achieved to become the top yachting destination worldwide during the last 20 years. The current study overviews the literature of yachting tourism and meta-analyzes the significant role of yachting in the economic development of Croatia, based on data sourced from the Croatian Bureau of Statistics. An overall image of the tourism activity in Croatia is provided, from which the differences between the coastal and non-coastal areas of the country become clearer. Literature review on yachting tourism, along with data analysis has been conducted. With the use of comparative document review, the connection between yachting tourism activity and economic development in Croatia is clearly demonstrated. Further data on accommodations and tourists' arrivals for the period 1998-2018 were employed to highlight the disproportion in the rhythm of development between the Adriatic zone of the country and the inner parts of Croatia. For all coastal areas, the contribution of yachting tourism in the local and state economy and the local communities is more than characteristic. The official data about marinas and employment in marinas for the period 2012 – 2017 is presented and further edited for this purpose. However, it seems that yachting tourism offered no solution to one of the biggest challenges of Croatia, which is the equal tourist development of all parts of the country.

Keywords: Yachting, Marina, Croatia, Economy, Coastal Areas

1. INTRODUCTION

The continuing growth of tourism on a global scale, from the '60s to nowadays, has led not merely to an increase in tourism demand, but also, to the emergence of new types of tourism, different that the initial Sun Sea Sex model. The 3S model started to gradually lose his appeal to more and more experienced tourists (Coccossis et al., 2011). Moreover, from the supply's aspect, several areas, worldwide, farther from big urban centers, started to adopt tourism as an economic development tool. Those areas took a distance from the mass tourism model, in their effort to differentiate their product. It was obvious, that there would be no results for them if they followed the 3S, as lack of infrastructures was a restrictive factor for tourism development. Consequently, different types of tourism come to surface. Special interest tourism (or Alternative tourism) is a wide term that was given to denote the differentiation from the 3S model or mass tourism.

Special interest in tourism planning focused on providing experiences and a more personalized approach to tourists' needs. Tourists who seek such kind of experiences are driven by multiple motives (nature-based, hobbies, sports, education, curiosity) and for this reason, this form of tourism is also called as motives tourism. According to Andriotis

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(2008), tourists' motivations related to this form of tourism can be listed as love for nature, outdoor activities, love for the sea, history and culture, health, wellness and learning.

In this paper, it becomes clear that yachting tourism constitutes a type of special interest tourism. Yachting tourists have as their motive the need for spending time in the sea by using a sailing or a motor yacht both as a mean of transfer and as their accommodation base. Also, love for the art of sailing is another significant factor for tourists selecting sailing tourism.

2. LITERATURE REVIEW

Several definitions of yachting tourism appear in the academic community. Diakomihalis (2009) refers to yachting as ''private sea journey'' and defines the term of yachting as the act of chartering a yacht both as a base for accommodation and recreation and as a mean of transportation, from a group of people who plan their route and navigate themselves for recreational purpose. Mikulić, Krešić, and Kožić (2015) from the University of Zagreb enlist yachting tourism as a form of special interest tourism and argue that yachting belongs to the wider category of maritime tourism. They also provide the terms: marina tourism and leisure boating tourism as synonym terms to yachting tourism. Nautical tourism is a wider term, which includes apart from holidaying with a yacht, multiple different sea activities, as participating in sea sports, fishing or tourists' educational interest in underwater life (Mikulić et al., 2015). Further, as Gračan, Gregorić and Martinić conclude (2016), "*nautical tourism covers the entire spectrum of activities given that boaters are not stationary, but guests are characterized precisely by their mobility"*.

According to Mylonopoulos and Mira (2005), "yachting tourism is a sea activity, where tourists charter a yacht for recreation and with the purpose to visit multiple seaside areas of a destination". Horak, Marušić, and Favro (2006) refer to yachting as a tourism activity which takes place beside or in the water and is highly connected to sailing, while, in parallel, they highlight the lack of a clear definition of yachting tourism from UNWTO or the Encyclopedia of Tourism. In the aforementioned definition, Luković (2013) argues that "yachting can include apart from sailing several other activities, either at the marina or in the sea, as all of those elements co-create the total yachting experience". He, also, recognizes 3 main categories of nautical tourism: the marina industry, the charter industry and the cruise industry (Luković, 2012).

Furtherly, Coccossis, Tsartas and Griba (2011) directly connect yachting with sailing tourism and they conclude to a common definition for sailing and yachting tourism, "as the act of chartering different types of yachts for accommodating reasons from a group of people with homogenous characteristics and a common decision about the following routes".

A deeper analysis of the definitions above leads us to a crucial conclusion about the concept of yachting tourism. All definitions do not eliminate yachting as the act of chartering a yacht, but they refer to a wider experience in the sea, where a yacht plays the role of the accommodation facility and a tool for the satisfaction of their needs (sea journey, vacations).

2.1. The Yachting Tourism System

In yachting tourism, tourists can make use of either of their own yacht or charter a yacht from a fleet operator company. There is a plethora of travel agencies worldwide with expertise in yachts chartering, called Brokers or Boat charter agencies. Sailing tourism has become a significant trend in tourism during the last 2 decades, constituting the most productive and currency gaining activity of maritime tourism (Igoumenakis et al., 1998).

The demand for sailing yachts charters faces a continuous increase globally and proves to be noticeably profitable, as it is addressed to tourists with high consumption capacity (Hall, 2001).

Yachts chartering can be categorized in 3 cases, depending on the demand of tourists:

- A bareboat charter, where members of the crew are skipper license holders
- Skippered charter, where none of the crew members possess a skipper's license, or even if they do, they feel insecure to navigate on their own, thus, a professional skipper is required to be hired.
- Crewed charter, where the group of tourists charters a yacht including a professional skipper and a chef or a hostess onboard.

Yacht charters can be categorized under 2 cases, depending on the number of the chartered yachts:

- A bareboat charter, where a group of tourists charter their own yacht and follow their commonly planned route. This option is selected by more experienced yachters and, generally, by tourists aged 30+
- Flotilla charter, where the chartered yacht is part of a wider group of yachts, following a leading yacht. In this case, all flotilla yachts follow a pre-scheduled route and there is no flexibility for any yacht crew to select its own routes. This option is selected by less experienced tourists or tourists with entirely no previous experience. This option characterizes the tourists' age group of 18-25

The chartering of a yacht can proceeds in 2 ways:

- Direct charter from the end client to the fleet owner company
- Indirect Charter to the fleet owner company, through a broker (in this case, a commission is also added on the Net Price for the broker's services)

Chartering bareboat requires from the charterer and his group a deep knowledge of the selected destination and sufficient navigation knowledge. Of course, the fleet owner company members always provide useful information to the crew members about the area and suggested routes with natural beauty. In case that a Broker has intervened in the chartering process, the Broker will also advise the crew members about safe routes and places of interest within the visited area.

2.2.International Yachting Fairs

The growth of yachting tourism led to the emergence of several yachting fairs across the globe, as the demand for yachts chartering is gradually increasing. Table 1 demonstrates all the major International Yachting Fairs, based on web research:

Table 1: International Yachting Fairs

International Yachting Fairs	Location	Participants
Annapolis Boat Show 10–14 Oct. 2019	U.S.A. (Annapolis - Maryland)	B2B + B2C
Boot Dusseldorf 18–26 Jan. 2020	Germany (Dusseldorf)	B2B + B2C
Salon Nautique de Paris 07–15 Dec. 2019	France (Paris)	B2B + B2C
International Charter Expo (ICE) 07–10 Nov. 2019	Austria (Vienna)	B2B
Southampton International Boat Show 07–10 Nov. 2019	United Kingdom (Southampton)	B2B + B2C
Charter Meetup Greece 12–14 Apr. 2019	Greece (Athens)	B2B
Messe Tulln 07 – 10 Mar. 2019	Austria (Tulln)	B2B + B2C
Belgian Boat Show 09 – 17 Feb. 2019	Belgium (Gent)	B2B + B2C
Biograd Boat Show 17 – 19 Oct. 2019	Croatia (Biograd na Moru)	B2B + B2C

Source: By the Author, 2019. (The author participated in these organizations).

Yachting fairs can be grouped into 2 categories. These categories are listed below:

- B2B Yachting Fairs (exclusively for providers and entrepreneurs (Fleet operators – Brokers – Suppliers) B2B or B2B2C sales take place.

- Open Yachting Fairs, where yachting entrepreneurs and direct clients can participate (B2B, B2B2C, B2C sales take place)

In terms of visitor's numbers, Boot Dusseldorf has been the leading fair with the Salon Nautique de Paris following. International Charter Expo and Charter Meetup Athens have been the only B2B fairs in the tourism industry so far. Of course, we cannot ignore the Annapolis Boat Show in the USA, which constitutes a grand yachting fair on the American continent.

The yachting industry has been also having a presence in big international tourism fairs, as yachting is gaining more and more popularity as an option for holidays not only among sailors or yachters but to several groups of tourists. Table 2 presents the most important international tourism exhibitions with yachting tourism entrepreneurs among their participants, based on web research:

Table 2: International Tourism Fairs with Yachting Tourism Participations

International Tourism Fairs	Location	Participants
ITB Berlin 04 – 08 March 2020	Germany (Berlin)	B2B + Visitors
W.T.M. London 04 – 06 November 2019	U.K. (London)	B2B + Visitors
Athens International Tourism Expo (A.I.T.E.) 06 – 08 December 2019	Greece (Athens)	B2B + Visitors
Mitt Moscow 17 – 19 March 2020	Russia (Moscow)	B2B + Visitors

Source: The Author, 2019 (The author participated in these organizations).

Experts of yachting tourism strongly claim that this presence will expand to more tourist fairs in the next years, as yachting tourism (mainly sailing) becomes easier, less expensive and more enjoyable compared to past years, thus, more and more people select a yacht over a hotel for their holidays.

2.3. Economic and Social Impacts of Yachting Tourism

Yachting tourism has been proved a significantly profitable activity for tourism destinations, with direct or indirect social benefits following the financial ones (Favro & Gržetić, 2008; Favro et al., 2009; Zubak et al., 2014). There are ten sources of income for destinations, generating by yachting tourism activity:

- Berth fees for yachts in ports and marinas during the summer period (usually from April to October or November)
- Annually berthing fees, either in marinas or in yacht yards during the winter period (November to April)
- 12 months of operation for marinas and yacht yards with open vacancies for local communities.
- A plethora of seasonal open vacancies during the summer period
- Yachting tourists' consumption in marinas facilities
- Yachting tourists' consumption in the cities where every marina is located.
- Sales of fuel for the yachts
- Taxes for brokers and agencies commissions
- Taxes for fleet operator companies' incomes

- Financial benefits for all complementary sectors to yachting tourism (sea sports companies, transfer companies, souvenir shops, restaurants, local tour guides, technical support companies)

It is obvious that the financial benefits are spread among all the stakeholders of a destination and are not limited to fleet owner companies or brokers. Yachting tourism constitutes a direct source of income for residents and practitioners, while governments generate an indirect income through taxation (Zubak et al., 2014).

2.4. The Tourism Profile of Croatia

Croatia is a popular tourism destination among European travelers but also on a global scale. It is an independent state since the partition of Yugoslavia in 1991. The country covers a surface area of 56,5 km^2 and is divided into 3 zones: a) the northern zone, b) the Dinaric zone (mountain range area) and c) the Adriatic zone. (coastline areas) It covers 1,3% of the total European surface area (European Union, 2016) and claims slightly less than 1% of the total population of Europe (Eurostat, 2016; 2015). Croatia includes numerous islands (718 islands and islets) 289 rocks and 78 reefs along However, the islands amount to only 5.8% of the total Croatian surface area (Croatia.eu, 2018). 61 million overnights take place in the country, which equals with 5,1% of the total overnights in the European continent. It is impressive that based on the previous numbers, Croatia has been listed as a top destination in overnights per capita, along with Cyprus and Malta. Taking a closer look at the tourist activity spread, it is clearly observed that only the coastline areas of Croatia showcase intense activity, highly disproportionately to the other parts of the country (Table 7**).** For this reason, Croatia has concentrated its efforts on gradually developing different forms of tourism, apart from the 3S model (Sea-Sun-Sex or Sand) and nautical tourism. This plan was estimated to spread the financial benefits of tourism (social benefits too) to more areas, by promoting the special characteristics and assets of several other parts of Croatia (Lew, 2008; Robinson & Novelli, 2005; Trunfio et al., 2006). More specifically, the development of special interest tourism, nature, culture or gastronomy based) was the initial planning. However, results have not proved this theory so far, as the current situation shows clearly that tourists insist on showing preference in the third zone of Croatia (Adriatic zone). In more detail, the Croatian Tourist Board confirms that Croatia is closely associated in tourist markets with ‘’Sea Sun and Sand’’ holidays. Over 52% of tourists think of Croatia as a 3S destination, while 25% of tourists link Croatia directly with nautical tourism. (Dwyer et al., 2017).

2.5. Croatia as a Yachting Destination

Two major activities of nautical tourism take place in Croatia: yachting and cruising. Yachting is closer linked with staying on boats without a pre-determined itinerary, while cruising refers to the use of larger, crewed vessels with a pre-scheduled itinerary’’ (Marušić et al., 2014). Croatia witnesses a significantly growing demand for yachting tourism during the last 20 years (Kovačić et al., 2015). Weather conditions, natural beauty, and efficient destination marketing campaign are the three competitive advantages of Croatia’s success story. With mild winds and calm waters, Croatia claims to offer perfect sailing conditions to tourists. Numerous protected bays along Croatia’s coastline are also a major determinant for yachting tourists to select the country as a yachting destination. As Sevinç and Güzel (2017) states, the 2 main reasons for a region to become a yachting destination for yacht tourism are primarily its location and its natural and relatively clean bays. Protected bays constitute a strong asset for a destination, as yachting tourists prefer to anchor and overnight at such places. Croatia has succeeded in becoming the top destination for yachting tourism worldwide, based on the aforementioned factors, and also in a highly demanding environment, with several Mediterranean destinations competing to attract tourists' interest.

Another factor that contributed to the development of yachting tourism in Croatia is the political stability, especially during the last 5 years, in comparison to its main competitors (Greece and Turkey) Financial crisis and political instability of Greece during the period 2011 to 2017, adding to lack of safety that yachting tourists imputed Turkey during the period 2015-2016, created almost perfect conditions for Croatia to outpace its main competitors. Croatia provides more than 35.000 yachts berths and generated more than 800 million kunas[2] in 2008. An ambitious plan by the Croatian government for more than 15 billion kunas of income-generating by yachts berthing for the year 2019 has been deployed.

Regarding the profile of tourists that visit Croatia for yachting purposes, 76% of them are men. 30 – 49 years old is the main age group. German tourists are most of them, with Austrians and Italians following. 80% of yachting tourists who select Croatia as a yachting destination have a university education and the average length of stay is 14 days. Per capita consumption is 78 – 171€ (Andrijanić & Parlov, 2016). Additionally, according to the Institute for Tourism of Zagreb, most charterers in Croatia have managerial working positions. Entrepreneurs and pensioners follow. Regarding occupation, the Institute for Tourism points out the great difference between yachting tourists and the rest of the tourists in Croatia, who accommodate in hotels and they mainly consist of labor class and students (Institute for Tourism, 2012).

Another interesting element is the loyalty of tourists in Croatia, which is high and demonstrates equally high repeatability. The average tourist has visited Croatia at least 3 times for yachting holidays, according to the Institute for Tourism. This repeatability is significantly higher than of the visitors in hotels (Institute for Tourism, 2012). Also, the average length of stay is higher compared to the hotels 17 days according to the Institute for Tourism or 14 days according to Andrijanic and Parlov (2016). German tourists have an average of 26-day length of stay, following by Australians (20 days) and Italians (18 days). It is more than clear from the aforementioned data that Croatia has achieved to obtain a positive image not merely as a yachting destination but generally as a tourism destination. The high lengths of stay and repeatability is also an indicator for a high level of satisfaction among the visitors. Regarding nationalities, the great majority of tourists with interest to charter a yacht (either a sailing yacht or a motor yacht) are Europeans (Germans, Italians, British French and Dutch) (Diakomihalis & Lagos, 2008). Americans and Australians follow. American yachting tourists, in particular, as Diakomihalis states, they seem to prefer motor yachts over sailing yachts (Diakomihalis & Lagos, 2008).

Croatia has also become a pioneer in yachting global distributions systems (yachting GDS) providers as well. Currently, there are 4 GDS for yachts charters: Booking Manager - MMK, Nausys, Sedna, Yacht Sys. 2 out of 4 are Croatia based provider companies (MMK and Nau sys). Efficient marketing has been also proved a strong advantage for Croatia against its Mediterranean competitors. According to Annapolis Boat Show organizers, Greece is the first name that American tourists consider when they hear of the Mediterranean Sea as a destination. However, they finally book their holidays to Croatia, as Croatian fleet operator companies and Brokers appear to have a far better online presence.

3. METHODOLOGY

This paper constitutes a desk research investigating the broader impact of yachting tourism in Croatian economy. Secondary research has been executed, based on Croatian Bureau of

[2] The basic monetary unit of Croatia.

Statistics data major tourism parameters, as accommodation numbers, tourist arrivals numbers, number of marinas and number of employees in marinas, for the last 20 years (period 1998–2018) Literature review of yachting tourism has been used in combination with the presentation of the yachting tourism system. Further, data analysis has been conducted. With the use of documentary analysis, the connection between yachting tourism activity and economic development in Croatia is clearly demonstrated.

As the main tourist activity in Croatia takes place in the western part of the country, near the Adriatic Sea, this paper investigates the growth of 6 major areas: Dubrovnik, Zadar, Sibenik, Kotar – Dalmatia, Istria, and Split, where also yachting tourism flourishes. In particular, the significant growth of tourist arrivals is presented with the use of adequate data. For the same areas, official data about marinas (number of marinas, capacity, income, employment) is provided and by using comparative analysis we demonstrate the financial contribution of yachting tourism in Croatia. Based in literature review and the provided data, it becomes clear that Croatia has gained great social and economic support from yachting tourism activity in the period 2009-2018, in the form of direct income through taxation for the government but also for the residents through either a rise in working vacancies or tourists' consumption. Tourist consumption is also an indirect type of income for the government as well, through VAT or other indirect taxes.

4. Findings on Yachting Tourism of Croatia

Based on the sources of income this paper proceeds to a qualitative analysis of Yachting tourism in Croatia. Table 3 provide tourist arrivals annually for the period 1998 – 2018 (last 20 years). Six coastal areas have been selected, Dubrovnik, Zadar, Sibenik, Kotar–Dalmatia, Istria, and Split, which have gained high popularity within the examined period. The significant increase in the number of accommodations and in tourism arrivals within the period 1998-2018 are illustrated in Table 4.

Table. 3 Tourist Arrivals in Croatia (Period 1998 – 2018).

Coastal Areas of Croatia	Split – Dalmatia	Zadar	Sibenik – Knin	Istria	Primorje Gorski Kotar	Dubrovnik Neretva
1998	653.017	304.337	168.902	1.799.581	1.435.378	328.024
1999	589.731	265.791	144.422	1.576.726	1.226.328	281.989
2000	894.895	451.100	261.369	2.080.359	1.650.848	469.050
2001	1.050.906	612.121	506.299	2.377.801	1.853.917	563.585
2002	1.177.142	654.255	579.078	2.354.931	1.922.927	597.215
2003	1.236.570	741.076	639.714	2.436.799	1.997.459	696.960
2004	1.366.950	843.290	650.677	2.515.701	2.024.597	796.795
2005	1.505.266	931.509	750.840	2.505.017	2.076.456	909.374
2006	1.549.257	977.395	752.081	2.575.090	2.149.985	928.604
2007	1.731.039	1.072.659	820.312	2.719.949	2.247.788	978.402
2008	1.746.311	1.102.170	822.879	2.729.618	2.214.061	986.851
2009	1.657.945	1.049.019	746.532	2.755.269	2.205.627	957.229
2010	1.637.656	971.092	634.614	2.627.918	2.005.292	982.619
2011	1.777.700	1.022.464	650.059	2.895.686	2.170.286	1.046.826
2012	1.834.876	1.074.192	657.371	2.985.042	2.181.095	1.122.420
2013	2.037.977	1.086.788	716.849	2.980.663	2.245.691	1.241.254
2014	2.212.903	1.186.908	754.177	3.059.226	2.266.152	1.346.281
2015	2.473.538	1.289.162	797.035	3.369.905	2.451.047	1.443.103
2016	2.737.304	1.362.206	817.755	3.763.174	2.598.437	1.598.767
2017	3.159.851	1.559.419	923.233	4.104.018	2.789.179	1.864.114
2018	3.468.253	1.664.144	965.089	4.255.408	2.909.581	2.013.577

Source: Croatian Bureau of Statistics, 2018.

Tables 4 and 5 illustrate increasing trends for Croatia, both as a tourism destination and as a yachting destination. This seems to have a continuation in the next years, as far as not any serious incident occurs, or competitor countries of Croatia, as Greece and Turkey, increase their share of the tourism market.

Table. 4 Increase Rate of Accommodations and Tourist Arrivals (1998 – 2018)

Seaside Areas of Croatia	Increase Rate 1999-2018 (Accommodations) (%)	% Increase Rate 1999-2018 (Tourists Arrivals) (%)
Dubrovnik – Neretva	434	513
Split – Dalmatia	414	2.581
Zadar	477	446
Sibenik – Knin	518	3.163
Istria	140	1.321
Primorje – Gorski Kotar	123	964

Source: Data were adopted by the author from Croatian Bureau of Statistics, 2018.

Table 5 highlights the significant increase in the number of marinas situated at the six main locations of interest (Dubrovnik, Zadar, Sibenik, Kotar – Dalmatia, Istria, and Split) for the period 2005 - 2017. An important element emerging from this Table, apart from the obvious increase in the number of marinas, is that the continuous rise in yachting tourism infrastructure features a developing phase for yachting tourism in Croatia. However, the falling rate of the increase in the number of marinas reveals the initiation of a mature phase of yachting.

Table. 5 Number of Marinas in Croatia (Period 2005 – 2017)

Coastal Areas of Croatia	Split Dalmatia	Zadar	Sibenik Knin	Istria	Primorje Gorski Kotar	Dubrovnik Neretva	Total
2005	11	21	11	14	21	6	84
2006	11	24	11	14	29	6	95
2007	11	23	11	14	30	5	94
2008	11	24	11	14	32	5	97
2009	13	24	11	14	32	4	98
2010	13	24	11	15	30	5	98
2011	13	21	13	15	30	6	98
2012	16	19	13	15	29	6	98
2013	17	23	14	14	32	6	106
2014	21	26	15	14	30	6	112
2015	20	36	17	14	27	7	121
2016	27	44	21	13	26	8	139
2017	27	46	21	12	26	8	140

Source: Data were adopted by the author from Croatian Bureau of Statistics, 2018.

An interesting element from Table 6 is the move of yachting tourists flows (number of moorings annually) along the Croatian coastline. This fact makes obvious the domestic competition of Croatian destinations. As such, the county of Primorje – Gorski Kotar displays a continuous decline in moorings during the period 2013-2017, the same as the county of Istria. However, the total number of moorings shows a gradual increase with an exception for the year 2017. This means a move of yachting tourists and boaters from the aforementioned counties to other counties, such as Zadar or Split – Dalmatia, which are highly characteristic paradigms of emerging yachting destinations in Croatia.

Table. 6 Number of Moorings in Croatian Marinas (Period 2013 – 2017).

Coastal Areas of Croatia	Split Dalmatia	Zadar	Sibenik Knin	Istria	Primorje Gorski Kotar	Total
2013	2.021	3.553	3.529	3.668	3.455	16.940
2014	2.332	3.596	3.552	3.605	3.422	17.221
% Increase 2013-2014	15,4	1,2	0,6	-1,7	-0,9	1,6
2015	2.290	3.820	3.630	3.601	3.266	17.351
% Increase 2013-2015	13,3	7,5	2,8	-1,8	-5,4	2,4
2016	2.451	3.969	3.671	3.512	2.891	17.428
% Increase 2013-2016	21,2	11,6	4	-4,2	-16,3	2,9
2017	2.414	4.110	3.662	3.084	2.870	17.067
% Increase 2013-2017	19,4	15,7	3.8	-15,9	-16,9	0,7

Source: Data were adopted by the author from Croatian Bureau of Statistics, 2018.

The continuous increase in the number of marinas leads to increasing marinas' incomes, as seen in Figure 1. In 2012 Croatian marinas generated 660 million kunas, while in 2013 this amount reached up to 680 million, displaying an increase of 3%. This increase continued during 2014 with a total income of 715 million kunas. In 2015 the total marinas' income amounted to 755 million kunas and, finally, 768 million kunas during 2016, showcasing an increase of 16,3% for the period 2012 – 2016.

Figure 1. Marinas' Incomes for the Period 2012 – 2016 in Croatia (.000 kunas).

Source: Data were adopted by the author from Croatian Bureau of Statistics, (2018).

It is important to point out that marinas' incomes are generated not only directly from yachts berthing, but also from yachting tourists' consumption in marinas facilities (bars, restaurants, souvenir shops, water sports equipment, other services). This last element has triggered marinas to offer a grand variety of services and invest in facilities and improvement of infrastructures. As a result, numerous marinas are considered destination assets for their countries and as a strong reason for yachting tourists to visit a destination.

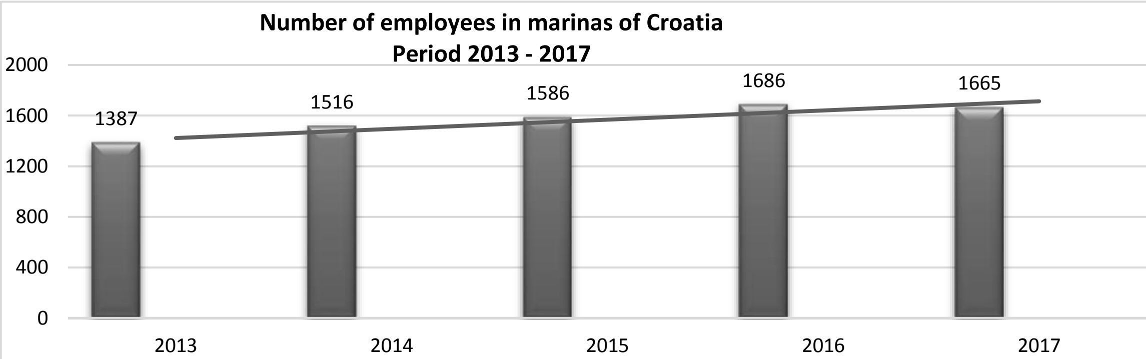

Figure 2. Number of Employees in Croatian Marinas for the Period 2013 – 2017.

Source: Data were adopted by the author from Croatian Bureau of Statistics, (2018).

Tables 5, 6 and Figures 1 and 2 demonstrate a rise of 16,6% in Croatian marinas income during the period 2012-2016 and a rise of 20% in employment in marinas in the period 2013-2017 This fact comes to a result of a noticeable increase of 66,6% in the number of marinas in the country within the last 12 years. Apart from the direct and indirect sources of income for the state of Croatia generated by this increase in the number of infrastructure and income, it is of major importance the contribution of this raise to local communities with new working positions.

Table. 7 Coastal vs Non coastal areas Accommodations and Tourism Arrivals

Non-coastal Areas of Croatia	% Increase Ratio 1999-2017 (Accommodations)	% Increase Ratio 1999-2017 (Tourists Arrivals)	Coastal Areas of Croatia	% Increase Ratio 1999-2018 (Accommodations)	% Increase Ratio 1999-2018 (Tourists Arrivals)
Krapina Zagorje	223	285	**Dubrovnik Neretva**	434	513
Sisak Moslavina	99	110	**Split Dalmatia**	414	2.581
City of Zagreb	287	242	**Zadar**	477	446
Varazdin	41	66	**Sibenik Knin**	518	3.163
Koprivnica-Krizevci	-1	73	**Istria**	140	1.321
Bjelovar Bilogora	153	119	**Primorje Gorski Kotar**	123	964

Source: Data were adopted by the author from Croatian Bureau of Statistics, 2018.

A comparison in growth among the seaside part of Croatia (Adriatic zone) and the rest of the country (northern zone and Dinaric zone) can be found in Table 7 In this Table, the difference in tourism activity between the coastline and the non-coastal areas of the country is clearly demonstrated. However, there is a notable increase in accommodation and tourist arrivals numbers of noncoastal areas, which can be explained by the fact that Croatia has put serious efforts in promoting those areas through the development of other types of tourism than yachting or massive tourism (special interest tourism). Another element is the significant increase in accommodations and tourist arrivals of the capital city of Croatia, which is a positive impact of the establishment of Croatia as a global tourism destination.

Regarding job vacancies, as shown in Table 8, there is an increase in the rate of seasonal employment during the period 2013-2017. In 2013 a ratio of 1/5 (19%) of marinas' employees were occupied in a seasonal base. Within the next two years, this ratio increased to almost 1/4 (26,6%), remaining at the same level until 2017 (26,9%).

Table 8. Rate of Seasonal Employment in Marinas of Croatia (2013 – 2017)

Year	Number of employees (Total)	Number of employees (Seasonal)	Rate (%) Seasonal Employment
2013	1.387	264	19
2014	1.516	336	22,2
2015	1.586	423	26,6
2016	1.686	455	26,9
2017	1.665	448	26,9

Source: Data were adopted by the author from Croatian Bureau of Statistics, 2018.

This increase in the rate of seasonal employment can be explained by strong seasonality, which is the main characteristic of yachting tourism. The rise in the number of marinas and the increase in their generated incomes have been proved insufficient to decrease the rate of seasonal employment in the yachting sector in the same period (2013–2017).

4. CONCLUSION AND DISCUSSION

The continuous development of yachting tourism on a global scale is an undoubtful fact, as tourists show increasing interest in this form of special interest tourism. Multiple destinations across the globe are focusing their tourism planning on developing yachting. Caribbean islands and eastern Mediterranean countries (Greece, Croatia, and Turkey, in particular) constitute the most popular destinations among yachters. Croatia has achieved to become a top yachting destination within the last 20 years. Of course, data shows that Croatia is continuously gaining popularity as a tourism destination and not merely among yachting tourists. The numbers of accommodations and tourist arrivals for all counties of Croatia for the last 20 years (period 1998 – 2018) clearly show a flourish of tourism across the country. However, the intensity of tourism activity, along with the tourism growth rate show great differences between the three zones of the country. The Adriatic zone, which consists of the coastline and the islands, shows a tremendous increase regarding accommodations and visits compared to the other 2 parts of the country, where an increase is also noticed but in a slower rhythm. The Croatian government has focused its efforts on developing special interest forms of tourism and spread the benefits of tourism among the entire country, but data proved those efforts insufficient.

Yachting tourism has significantly contributed to the economy of Croatia, but also to local communities' prosperity, as more and more yachters select the country as their holidays destination and spend money on chartering a yacht or further needs. This yachting activity, of course, was not ignored by public sector and entrepreneurs. Actions were taken about the creation of high standards marinas and other yachting infrastructures, which, on the one hand strengthened Croatia's position towards its competitor countries and on the other hand numerous new working positions were opened for the locals. The current paper suggests that further acts needs to be taken in order for Croatia to respond to this gradually increase in demand in a sustainable way.

As yachting tourism is still spotted in its development phase, this paper highlights the importance of strategic planning for yachting development to be conducted, so that the Croatian economy and local communities benefit the outmost, without any decline in the quality of services or the navigation safety. It is, also, a fact that yachting tourism addresses to middle- and higher-income tourists (Mikačić, 2002; Favro & Grzetic, 2008), which is another strong reason for more and more areas across the coastline of Croatia to invest in yachting infrastructures, with the aim of developing the potentials of yachting tourism. The goal of spreading yachting activity in more areas is twofold: First, it will enable more areas across the coastline to gain popularity among yachting tourists. By this, more areas will take advantage of the economic and social benefits of yachting tourism. Secondly, spreading yachting activity in more areas will decrease the concentration of yachts and tourists in these areas, retaining the environmental and social carrying capacity of those areas.

In a wider framework, similar research is suggested to be conducted for Turkey and Greece, the main competitors of Croatia. As mentioned, the cluster of those three countries constitute the second top visited yachting destination in a global scale (Eastern Mediterranean), hence, it is essential to be examined in what way this form of tourism contributes to countries' economies and local communities' prosperity. Also, the environmental impact of such an increase should be examined in the 6 areas of Croatia where yachting tourism takes place (Dubrovnik, Zadar, Sibenik, Kotar – Dalmatia, Istria, and Split). The increase of 19,4% in the number of moorings during the period 2013 – 2017, combined with the fact that 64 new marinas were built during the period 2005 –

2017, should be monitored from an environmental aspect. Current environmental situation in the aforementioned areas and any possible correlation between environment degradation and yachting development should be examined.

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