

Article

Management Framework for Sustainable Nautical Destination Development: The Case of Montenegro

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Abstract: This paper examined ten main components of a nautical destination and the level of satisfaction with them by the nautical tourists visiting Montenegro. The goal is to propose the strategic management directions for sustainable development of Montenegro as an attractive, new Adriatic and Mediterranean nautical destination. A sample of 609 nautical tourists was examined on different dimensions of Montenegro as a destination; their obtained responses used exploratory factor analysis. All categories of respondents expressed the greatest level of satisfaction with the natural beauties of Montenegro, while being least satisfied with the nature protection. Given that strategic decision-makers are still in the process of considering the options for the development of the researched destination, and that foreign investors have recognised its attractiveness, this paper aims to offer to all stakeholders—the central government, local self-governments, investors, managers and tourism organisations—a framework for sustainable nautical destination management. The survey focuses on satisfaction defined quite broadly, since the aim is to gain an insight into crucial elements threatening the destination's sustainability to be able, in the next steps, to examine the specificities of the problems detected. An added value is the applicability to similar nautical destinations, which very much like Montenegro, invest considerable efforts in boosting the development of this segment of tourism supply.

Keywords: nautical tourist destination; sustainability; nautical tourist satisfaction; management; sustainable development



Citation: Kovačević, Z.;

Šekularac-Ivošević, S. Management Framework for Sustainable Nautical Destination Development: The Case of Montenegro. *Sustainability* **2022**, *14*, 11476. <https://doi.org/10.3390/su141811476>

Academic Editor: Marc A. Rosen

Received: 18 July 2022

Accepted: 5 September 2022

Published: 13 September 2022

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1. Introduction

The process of littoralisation, which is now, after 150 years of continentalisation, gathering pace at all levels, is caused by the peculiarities of the sea as the largest and most important biotrophic factor on Earth [1]. The benefits of this process were most felt in the countries on the European shores of the Mediterranean, in the Caribbean and in Australia, where maritime activities play a significant role in the development of national economies [2]. Maritime tourism growth rates mostly surpass other forms of tourism, gaining an increasingly significant share in the global economy [3]. In the 1980s, it was noticed that among all maritime activities, nautical tourism showed the most dynamic growth. Encouraged by these trends, many tourist destinations intensified the development of coastal infrastructure for the reception of leisure boats [1].

Montenegro lacks a strategy paper that would set the direction for the development of this segment of tourism at the destination level, although back in late 2018, the Ministry of Tourism began the preparations for drafting the Strategy for Nautical Tourism Development 2020–2025. The 2008 Master Plan, as the main strategic planning document for the development of Montenegrin tourism, which expired in 2020, favours the development of selective tourism [4]. However, notwithstanding the distinct potential of the coastal region and the development trends over the observed period, the Master Plan failed to address the issue of nautical tourism [5]. The 2021 assessment of the implementation of this strategic

document, carried out by the line ministry to provide inputs for future policies and plans, also fails to identify the absence of a nautical tourism strategy as a gap [6].

From 2007 to 2018, along the 295 km long stretch of Montenegrin coast, 1800 commercial berths were developed and made operational [7], meaning that in 2020, when the new marinas in Tivat (Lustica Bay) and Herceg Novi (Porto Novi and Lazure) started to be utilised, the overall capacity of nautical tourism ports exceeded 2000 berths. Over the period observed, the number of foreign vessels in nautical tourism which entered Montenegrin territorial sea, increased by more than 100%, from 2145 vessels in 2007 to 4775 vessels in 2019, while the number of tourist arrivals connected with leisure boats increased by 300%, from 9145 to 28,562 [8].

Examining a significant volume of research in the field of nautical tourism, we came to the conclusion that in a large number of destinations, the situation concerning sustainable destination management is very similar to that in Montenegro. Less developed countries, such as Montenegro, are particularly disadvantaged in terms of sustainable tourism development. The problem of implementing the sustainable destination management model in less developed countries lies in the fact that the economic dimension of development is given precedence, justified by the need to foster a better standard of living. Due to the lack of own-source capital, the control over tourism development is often relinquished to foreign interests, offering in the process of attracting capital various concessions such as tax incentives, liberal access to state-owned land, and low environmental standards [9]. Wishing to use scientific methods to obtain results that will harmonise nautical destination management with the principles of sustainability, we conducted the survey.

Since the destination's spatial potential for nautical tourism development, given the limited stretch of the Montenegrin coast, has been determined several times [10], and that the sociological, economic and environmental aspects of the carrying capacity from the point of view of the local population have already been measured [11], we surveyed nautical tourists to examine their views about different components of the nautical destination to develop the recommendations for having sustainable destination management.

The main motive driving this research is the observation that a significant number of authors in the field of nautical tourism believe that this market has likely not yet reached its peak. The consensus is that this is due to the limited research, particularly market-oriented, expectations of nautical tourists globally on current trends, and especially in Montenegro [12].

The theoretical background of this work is mainly based on the research carried out in Croatia and Spain, where the authors gave recommendations for defining management measures and strategies for the sustainable development of these nautical destinations [12–16]. Guided by their models formulated on nautical tourists' perceptions and satisfaction, we decided to develop research for Montenegro as the new point on the global map of nautical destinations. The nautical tourists are end users in the formation and distribution of the destination product. In that sense, the main research question in this paper is: How can the attitudes of nautical tourists contribute to the definition of the management framework and the national strategy for sustainable nautical destination development? The marginal contribution of the paper is that this was the first time in Montenegro where data was collected and confirmed that defining a framework of sustainable destination management measures was needed; this was required to make Montenegro an attractive nautical destination.

Our "2021 Survey of the Attitudes of Nautical Tourists in Montenegro" was carried out along the entire Montenegrin coast at the ten most important nautical spots and included 609 visitors from 30 countries. The survey was conducted in August, the nautical season peak in this part of the Mediterranean, and September as the month with the largest number of vessels in the shoulder season [17].

The survey aimed to explore the satisfaction of nautical tourists, focusing on destination components identified in the pertinent literature. Given the possibility of a "halo effect", i.e., the conflation of satisfaction or dissatisfaction with one of the components to the sentiment of the overall destination [18], tourists were surveyed on the ten most

important destination components, which were selected to cover a wide range of the diverse aspects of a nautical destination; these components surveyed were: organisation of nautical tourism (cross-border procedure, safety of navigation, availability of transit berths, availability of gas stations), marina-based services, supply of services (intended for vessels), hospitality offer, beach offer and quality, leisure amenities, culture and history, natural beauties, conservation-attitude towards nature, and a sense of security during your stay in Montenegro.

This research article is structured in the following way: after a concise overview of the scientific literature related to the sustainable development of nautical destinations, Section 2 summarises the methodology covering a description of the materials and methods applied to conduct the work, which involves the description of the conceptual framework, as well as statistical analysis of the data and structure of the research instrument. Section 3 is devoted to the results, highlighting the characteristics of the nautical tourist visiting Montenegro and the composite satisfaction index. Moreover, key findings are discussed in Section 4. Section 5 concludes on the main results, and emphasises the wider implications of this work. Finally, Section 5 also summarises limitations and recommends future studies.

2. Materials and Methods

2.1. Theoretical Background

Nautical tourism, as a part of selective tourism in all its subtypes (yachting, marinas, charter, cruising), is a highly profitable activity, which in the context of destination sustainability, primarily depends on the quality of destination management [19]. With this paper, we tried to raise the quality of management of a nautical destination in a long-term sustainable way. The previous statement implies conducting a corehensive research of the end users' attitudes so that it would be the starting point for establishing or changing the way of managing a nautical destination. The surveys of this type are made difficult given the absence of a widely accepted definition of sustainable tourism, on the one hand [16], and of a single definition of nautical tourism, on the other. Thus, this paper determines the essential components of the nautical destination contributing to the definition of nautical tourism and its sustainable development. Among the multitude of nautical tourism definitions that exhibit certain specificities but also share some similarities, all can largely be divided into the ones based on economic considerations or the ones focusing on the leisure approach [20–23].

For many years, the pace of actual nautical tourism development has not been properly followed by research. The first paper related to nautical tourism was published by Miller in 1986, followed three years later by Dešković on "Development of Marinas in Yugoslavia". However, the number of papers on the subject in WOS and SCOPUS indexed journals was under 10 papers published annually until 2007, when more intensive publication of petinent research papers began [24]. Considering that in Montenegro this tourism segment has been developing more intensively only in the last twelve years, and that the local scientific community is only peripherally touching this subject, it is not surprising that only a few papers have been published in journals indexed in major bibliographic databases.

Existing studies show the relationship between customer satisfaction and responsible sustainable management of tourist facilities. The application of the principle of sustainable management is one of the most important factors a tourist considers when deciding to return to the location or to recommend a destination [25]. Concerning sustainability, studies that examine customer satisfaction are mainly based on data from surveys and interviews [26].

So far, no one has tried to determine the carrying capacity of Montenegro as a nautical destination by applying the principles of sustainable development. Many authors argue that defining sustainable development and carrying capacity are essential for tourist destination management [27]. Carrying capacity can be defined as the ability of the destination to receive a certain number of nautical tourists that justify the development of certain reception facilities, without significantly disrupting the already built, natural and socio-cultural

environment of the given area. Sustainable tourism requires management that anticipates and pre-empt problems that arise when the carrying capacity is exceeded [27]. The contribution of this work is reflected in a sizeable sample, which can provide data on the challenges that threaten the sustainability of the nautical destination.

In the research on the attitudes of the bidder in nautical tourism in the Balearic Islands from 2017, local actors saw Montenegro and Croatia as successful models of destination development; these two destinations and their policy approaches, clearly strive to take a significant share in this high tourism market and thus ensure sustainable business for the national economy [28]. However, on deeper examination of the views expressed by the surveyed local stakeholders, one sees that it is primarily based on Montenegrin privileged tax policy for nautical tourism, which encouraged exceptional growth of investment and arrivals, without taking into account long-term sustainability. Compared to the findings of the literature mentioned, this work reveals the perceptions of the final users, which could affect the stakeholders' income. At the same time, tax policies are temporarily not being dealt with or considered.

The discussions around sustainable tourism are largely based on value judgements, and less on empirical research and evidence [29]. The annual statistics on the number of vessels and tourist arrivals provided by the Montenegrin Statistics Office (MONSTAT) fail to provide the data needed to define sustainable destination management policy, particularly given that it fails to capture the visitors and vessels continuously staying in Montenegrin territorial waters, regardless of the flag they fly. The problem of tracking nautical tourists to identify the reasons for choosing specific navigation routes, together with transit and final destinations, is a challenge that most destination managers face. Data obtained using modern technologies, such as AIS (Automatic Identification System), can provide a better insight into the number and location of vessels at a destination, but cannot give any indication of the reasons for choosing it over others, which is crucial for modelling management and development decisions and plans [30]. More specifically, knowing the attitudes of nautical tourists is the basis for ensuring product differentiation, as a key element of long-term sustainability of nautical tourism companies and destinations [31]. Thanks to their long-term work and personal authority in the field, the authors carried out primary research since the MONSTAT's database does not contain data on nautical tourists' perceptions, motives, and satisfaction.

Choosing one of the tourism market segments has significant implications for defining the destination's sustainable tourism strategy, because their behaviour produces different environmental, economic, socio-cultural and political impacts [13,32]. The behaviour of market segments is not based on socio-demographic and economic characteristics only, but also includes behavioural and psychological characteristics through the analysis of motives, attitudes, risk perception, products and the like [33]. According to Antunac, each type of selective tourism has underpinning motives which are distinct from other types and which direct it towards a certain selective product [34]. Measuring and understanding the key determinants of nautical tourist satisfaction can significantly contribute toward successful destination management [35]. The demographic profile of visitors may serve destination managers as a guide on where to locate demand [3]. Therefore, this paper examines different characteristics of target market segments according to the cited literature; this paper clearly distinguishes the profile of the market segments of Montenegro as a nautical destination (See Sections 2.2.1 and 2.2.3). Knowing that there is more than modest research so far, this paper's contribution is significant in providing information about the market, both to future researchers and to representatives of the industry.

The utilisation of the destination's spatial resources leads to conflicts between different interest groups, from investors in tourist facilities, residential units, and shopping malls on the one hand, to those who would invest in green spaces, parks and protected areas, on the other. Deciding on priorities is one of the biggest challenges for policy-makers and destination managers when putting sustainable management in place [14]. The set of measures proposed in this paper address the responsibilities of three key stakeholders:

the central government, local governments and service providers; this paper proposes the integration of the theoretical bases of marketing and management as scientific disciplines. Namely, the authors developed a management framework for the stakeholders mentioned above to act after investigating the satisfaction of nautical tourists.

Recent years have seen growing global concern about the state of the coastal and marine environment, coupled with a clear aspiration of nautical tourists to experience a pristine environment [36], which only adds to the topicality of this survey.

2.2. Methodology

2.2.1. Data Collection

The survey began with an analysis of relevant literature. By applying the method of classification, in the process of selecting literature, we were guided by titles and key-words, the content of book prefaces, and abstracts of scientific articles. The key words used as search criteria include: nautical tourism, maritime tourism, yachting, destination management, destination sustainability, customer satisfaction, etc.

As shown in Table 1, the “2021 Survey of the Attitudes of Nautical Tourists in Montenegro” was primarily conducted as field survey, while a small section was conducted using CAWI (Computer Assisted Web Interview)–Google Survey. The questionnaire was printed in 1000 copies in 5 languages (English, German, Russian, Italian and Montenegrin). The same questionnaire in 5 language versions was prepared in the Google application, for those respondents who preferred to present their views in digital form, usually after leaving the destination. Respondents were offered a 5-point Likert scale to express their level of satisfaction with the statements related to nautical destination components.

Table 1. Structure of the questionnaire for the “2021 Survey of the Attitudes of Nautical Tourists in Montenegro”.

Question Category	Subcategory	No of Questions
(1) Nautical tourists	Country of origin	
	Age (years: less than 25, 26–35, 36–45, 46–60, 60+)	
	Sex (F/M)	
	Education (elementary school or lower, High school, Faculty or College, MSc, PhD)	
	Monthly household income (eur: up to 2000, 2000–3500, 3500–5000, 5000–10,000, over 10,000)	
	Frequency of visiting Montenegro (first time, second time, 3–5 visits, 6 visits or more),	
	Length of stay in Montenegro(days: up to 3, 3–7, 7–14, more than 14)	
		Total 7
(2) Nautical destination components	Organisation of nautical tourism supply (Q1)	
	Marina-based services (Q2)	
	Supply of services (Q3)	
	Hospitality offer (Q4)	
	Beach quality (Q5)	
	Leisure amenities (Q6)	
	Culture and history (Q7)	
	Natural beauties (Q8)	
	Nature conservation (Q9)	
	Feeling of security (Q10)	
		Total 10
		Total 17

Field work was carried out at the 10 most important nautical tourism spots along the Montenegrin coast, from the sea border with Croatia to the border with Albania (Figure 1): (1) Border Police Office Herceg-Novi, (2) Municipal Port Škver, (3) Zelenika

Service Marina, (4) Marina Porto Novi, (5) Border Police at the BCP Port of Kotor, (6) Marina Porto Montenegro, (7) Marina Lustica Bay, (8) Border Police in the Port of Budva, (9) Marina Bar, and (10) Border Police Office in the Port of Bar. Thanks to the cooperation with the Border Police, the survey also included those nautical tourists who did not stay in marinas, but are obliged under Montenegrin regulations to report to the Border Police when entering/leaving the territorial waters of Montenegro.

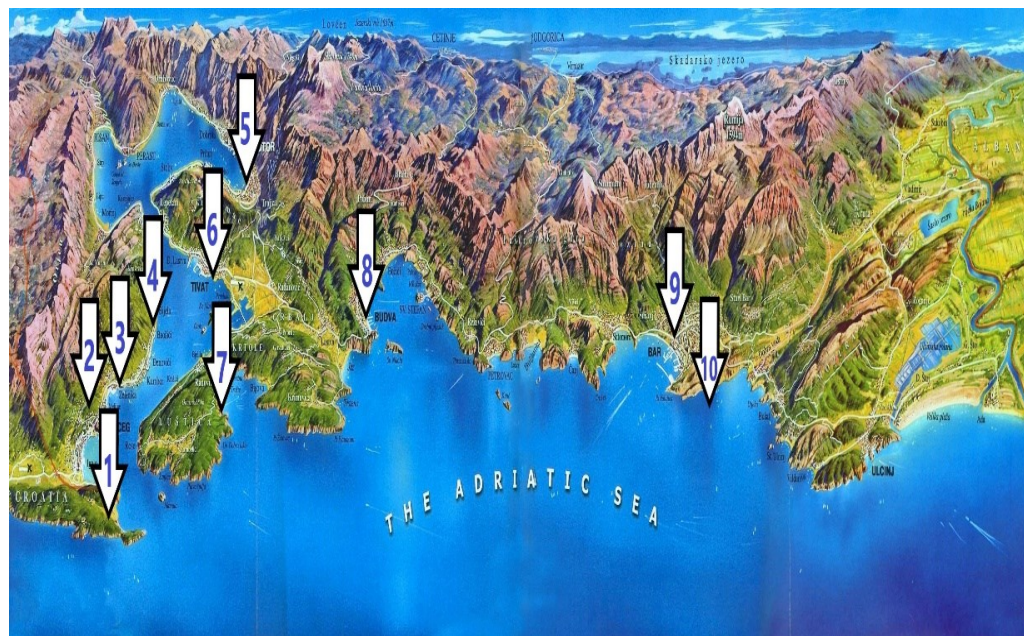


Figure 1. The locations along the Montenegrin coast covered by the survey. Source: Elaborated by the authors-<https://www.mapsland.com/europe/montenegro> (accessed on 25 January 2022).

2.2.2. Measures Used

We propose that the respond to the research question given in the Introduction section will be the set of measures defined as in Figure 2.

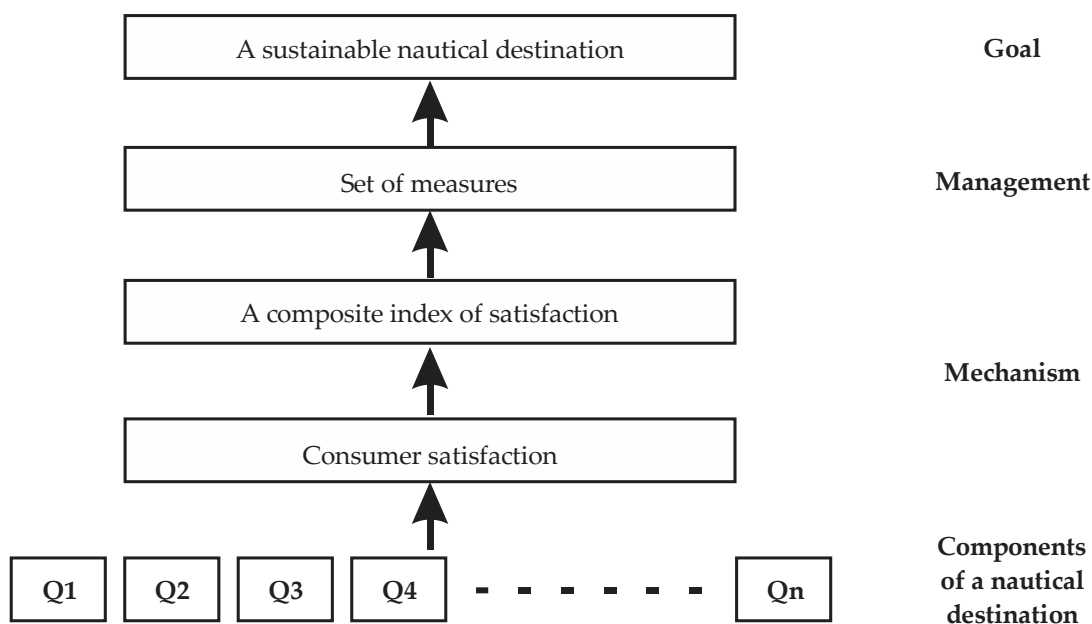


Figure 2. The methodological framework.

The primary survey is underpinned by various components of a nautical destination (Q1–Qn) to examine consumer satisfaction. The components of nautical destinations have been determined to be comparable to the results of research on the attitudes of nautical tourists in neighboring Croatia-TOMAS NAUTICA, conducted by the Zagreb Institute of Tourism since 2004 [37]. The locations had the same questionnaires and were answered based on each location experience and the ten main components. The tool used to define the set of measures to achieve the goal—sustainable nautical destination—is a composite index of satisfaction (Figure 2).

2.2.3. Survey Sample

The survey conducted among nautical tourists on board pleasure boats in August and September 2021 came to a random sample of 609 respondents from 30 countries. Of that number, 360 were from non-EU countries (majority from Russia, Serbia, USA, and Great Britain) and 249 from EU member states (majority from Croatia, Italy, Germany, and France). The age structure of the respondents shows that the largest share fall in the age group 46–60 (30.5% or 186), followed by 26–35 with 24.1% (147) and 36–45 with 22.7% (138). The respondents under the age of 25 accounted for the lowest share (4.9% or 30). Among the respondents, men outnumber women with 74.9%, which is not peculiar to Montenegro alone: rather, a similar trend was observed in the studies of the characteristics of nautical tourists in other destinations. The vast majority of respondents or 79.8% are university graduates, and among them 27.6% have a master's degree, and 4.9% a doctor's degree. The survey confirmed that nautical tourists belong to high-end tourism demand, judged by their monthly income. Over half of the respondents (51.7%) have a monthly income in excess of 3500 Euros, while less than a quarter (21.2%) have incomes below 2000 Euros. 29% of respondents have a monthly income of over 5000 Euros, and 11.3% of them over 10,000 Euros.

2.2.4. Data Analysis

We obtained data from a sizable sample, which was statistically processed using SPSS.

The normality check for each of the variables included in the factor analysis was performed using graphic methods of the Q-Q plot, and the outliers were identified using the Box-plot. The sample is also large enough, so we relied on the application of the Central Limit Theorem (CLT). CLT states that the distribution of sample means approximates a normal distribution as the sample size gets larger, regardless of the population's distribution.

In addition to descriptive statistics, we used factor analysis to condense and reduce the number of (empirical) variables interrelated into a smaller number of mutually relatively independent latent variables that can explain the interrelationships of the research subject. The PCA was used for the factors extraction. In this particular case, factor analysis was applied to determine adequate weights that will be assigned to the variables that make up the structure of the Composite index of satisfaction. The weighting values are proportional to the percentage of the variance explained by the components isolated and to the factor loadings of each manifest variable [38].

Using the PCA method, two main components have been identified that explain 57.16% of the total variability in the data. The reliability test that was applied is the Intraclass correlation coefficient; its value of 0.86 confirms the validity of the analysis.

We structured the different ratios of the results obtained, and then, by creating a composite satisfaction index, we determined 10 variables to which weights were assigned proportionally to the values of factor loads.

We applied the t-test for independent samples, as well as the ANOVA (analysis of variance) test to examine different relationships of data obtained from the sample [39]. After synthesising the data obtained from literature and the statistical processing of the survey data, using the description method, guided by the recommendations given in the sixth and seventh editions of the Publication Manual of the American Psychological Association [40,41], we presented the survey results.

3. Results

All categories of respondents, observed by the number of visits, expressed the highest degree of satisfaction with the natural beauties of Montenegro.

First-time visitors to Montenegro are least satisfied with Q5-Beach offer and quality (3.702); those who are in Montenegro for the second time are the least satisfied with nature conservation Q9-(3.66). Category 6 multiple-visit respondents are least satisfied with the supply of services for vessels in Montenegro-Q3 (average satisfaction level 3.63). All categories expressed the lowest level of satisfaction (less than 4) with how Montenegro treats nature protection. Only first-time visitors assign to Q9 an average score of more than 4; still, their average level of satisfaction with nature conservation is lower than other tested criteria (Table 2).

Table 2. An overview of average satisfaction levels in reference to frequency of visits.

Frequency/Variables		Q1	Q2	Q3	Q4	Q5	Q6	Q71	Q8	Q9	Q10
First time	Mean	4.2041	4.1020	3.9375	4.1633	3.7021	3.9388	4.2041	4.5918	4.0204	4.0408
	N	147	147	144	147	141	147	147	147	147	147
	Std. Deviation	0.70165	0.79152	0.75000	0.71233	0.79951	0.76949	0.67173	0.60540	0.84780	0.75741
Second time	Mean	4.1667	4.3333	3.9714	4.2222	4.0278	3.8611	4.1667	4.4286	3.6667	4.3333
	N	108	108	105	108	108	108	108	105	108	108
	Std. Deviation	0.72987	0.62652	0.94520	0.63147	0.68982	0.79082	0.80303	0.84190	0.94720	0.71040
3–5 visits	Mean	4.1795	4.2821	4.1026	4.1026	3.8974	3.9231	4.3333	4.5385	3.9231	4.3333
	N	117	117	117	117	117	117	117	117	117	117
	Std. Deviation	0.71457	0.64120	0.74723	0.81351	0.87479	0.73290	0.73108	0.67643	1.00133	0.69481
6 visits or more	Mean	3.9241	4.1519	3.6329	3.8228	3.7089	3.7468	4.0759	4.6329	3.7089	4.1519
	N	237	237	237	237	237	237	237	237	237	237
	Std. Deviation	0.91279	0.71465	0.97221	0.82482	0.97187	0.97600	0.67219	0.55641	0.87554	0.76616
Total	Mean	4.0837	4.1970	3.8557	4.0296	3.8010	3.8473	4.1724	4.5693	3.8177	4.1921
	N	609	609	603	609	603	609	609	606	609	609
	Std. Deviation	0.80575	0.70984	0.89521	0.78164	0.87615	0.85532	0.71278	0.65124	0.91656	0.74838

Comparing the average level of satisfaction with the respondents' length of stay in Montenegro revealed that nautical tourists staying up to 3 days are the only category rating only one satisfaction criterion below 4 on average, more specifically Q9 (3.89)-nature conservation, while at the same time they are most satisfied with Q8 (4.48)-natural beauties. Tourists who stay for 3 to 7 days are least satisfied with Q5-Beach offer and quality, while they also express the highest level of satisfaction with natural beauties (4.517). The visitors staying from 7 to 14 days, as well as those staying up to 3 days, are least satisfied with nature conservation (average 3.81), while at the same time they are most satisfied with the natural beauties (4.63). Lastly, those who stay in Montenegro the longest (over 14 days) are least satisfied with the beach offering and quality (3.57) and the supply of services for vessels (3.73), and most satisfied with the natural beauties of Montenegro (4.65) (Table 3).

Table 3. An overview of average satisfaction levels in reference to length of stay.

Length of Stay in MNG/Variables		Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10
Up to 3 days	Mean	4.4359	4.3846	4.1053	4.2821	4.1579	4.1282	4.1795	4.4872	3.8974	4.0769
	N	117	117	114	117	114	117	117	117	117	117
	Std. Deviation	0.71178	0.74099	0.85568	0.68034	0.74761	0.76043	0.81595	0.78362	0.98598	0.86257
3–7	Mean	3.9322	4.0000	3.7414	3.9831	3.6724	3.8136	4.1525	4.5172	3.7797	4.1525
	N	177	177	174	177	174	177	177	174	177	177
	Std. Deviation	0.71186	0.61237	0.80232	0.70287	0.65547	0.65213	0.63461	0.59598	0.76280	0.66093
7–14	Mean	4.1628	4.2093	3.9767	4.0000	4.0000	3.8837	4.1860	4.6279	3.8140	4.3488
	N	129	129	129	129	129	129	129	129	129	129
	Std. Deviation	0.68226	0.63337	0.73384	0.78062	0.81009	0.72487	0.72637	0.57377	0.97442	0.60791
More than 14	Mean	3.9672	4.2459	3.7377	3.9344	3.5738	3.6885	4.1639	4.6557	3.8033	4.1803
	N	183	183	183	183	183	183	183	183	183	183
	Std. Deviation	0.94288	0.78423	1.05718	0.88707	1.06584	1.09756	0.70743	0.62596	0.97473	0.82225
Total	Mean	4.0891	4.1931	3.8600	4.0297	3.8050	3.8515	4.1683	4.5771	3.8168	4.1881
	N	606	606	600	606	600	606	606	603	606	606
	Std. Deviation	0.80411	0.70934	0.89540	0.78358	0.87650	0.85535	0.71215	0.64335	0.91874	0.74806

Comparing satisfaction ratings with monthly income levels shows that the respondents with income up to 2000 Euros per month express the greatest satisfaction with natural beauties of Montenegro (4.65), while the offer of leisure amenities (Q6) together with Q9 (nature conservation) was rated the lowest with the average score of 3.72. Respondents with a monthly income of 2000 to 3500 Euros, as well as those with an income of 3500 to 5000 Euros, are most satisfied with natural beauties, and least satisfied with the attitude towards nature at the destination. In contrast, respondents from categories with incomes from 5000 to 10,000 Euros and above showed the lowest level of satisfaction with Q5 (beach offer and quality), and the highest, very much like other categories of respondents, with the natural beauties of Montenegro. Looking at the overall rating, in addition to natural beauties Q8 (4.57), marina-based services-Q2 is the best rated segment (4.19). While nautical tourists, from previous categories in total, are least satisfied, in addition to Q9 (nature conservation), also with Q5 (beach offer and quality) and Q3 (supply of services for vessels) (Table 4).

Composite Satisfaction Index

The composite satisfaction index includes the 10 variables (Q1–Q10). The weights assigned to each variable are proportional to the values of the factor loads obtained by applying the exploratory factor analysis. Using the Kaiser-Meyer-Olkin Measure of Sampling Adequacy (KMO) and the Barlett's Test (Table 5), we found that the conditions for applying this analysis were met, because the KMO Measure is 0.879 and at the same time it exceeds the cutoff value of 0.5.

Table 4. An overview of average satisfaction levels in reference to monthly income.

Monthly Income		Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10
Up to 2000 e	Mean	4.2326	4.2558	3.8372	4.0233	3.7442	3.7209	4.1395	4.6512	3.7209	4.2326
	N	129	129	129	129	129	129	129	129	129	129
	Std.										
	Deviation	0.74490	0.75290	1.01389	0.79515	1.08454	0.99982	0.63423	0.52517	0.90119	0.74490
2000–3500	Mean	3.9804	4.0980	3.8627	4.0588	3.8235	3.8431	4.0784	4.4400	3.7647	4.2353
	N	153	153	153	153	153	153	153	150	153	153
	Std.										
	Deviation	0.75629	0.63624	0.79521	0.75424	0.81206	0.75322	0.86244	0.80668	0.94427	0.70491
3500–5000	Mean	4.1304	4.1522	3.9130	4.1304	4.0667	3.8913	4.1957	4.6087	3.8696	4.2391
	N	138	138	138	138	135	138	138	138	138	138
	Std.										
	Deviation	0.68163	0.66070	0.83253	0.74311	0.71446	0.86863	0.64907	0.60935	0.79987	0.73051
5000–10,000	Mean	3.8889	4.2500	3.7059	3.9444	3.6000	3.8333	4.2500	4.5833	3.7778	3.9444
	N	108	108	102	108	105	108	108	108	108	108
	Std.										
	Deviation	1.07940	0.79866	0.96049	0.78339	0.87266	0.83722	0.68529	0.59789	1.11350	0.85197
Over 10,000	Mean	4.2609	4.3043	3.9130	3.8261	3.6087	4.0435	4.2174	4.6087	4.0870	4.2609
	N	69	69	69	69	69	69	69	69	69	69
	Std.										
	Deviation	0.67850	0.69249	0.88682	0.87374	0.77112	0.75605	0.66132	0.64665	0.72232	0.67850
Total	Mean	4.0854	4.1960	3.8477	4.0201	3.7970	3.8492	4.1658	4.5707	3.8191	4.1859
	N	597	597	591	597	591	597	597	594	597	597
	Std.										
	Deviation	0.80752	0.70719	0.89471	0.78338	0.87878	0.85573	0.71487	0.65386	0.91818	0.75124

Table 5. KMO and Bartlett's Test.

KMO and Bartlett's Test		Measure
Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		0.879
Bartlett's Test of Sphericity		Approx. Chi-Square
		Df
		2223.158
		45

All variables comply with the requirements for being included in the factor analysis, as the Measures of Sampling Adequacy (MSA) for each of the variables was higher than 0.5. Using the PCA (Principal Component Analysis) method, two main components were identified, which account for 57.611% of the total variability in the data (Table 6).

Table 6. Principal Component Analysis.

Component	Initial Eigenvalues			Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings		
	Total	% Variance	Cumulative %	Total	% Variance	Cumulative %	Total	% Variance	Cumulative %
1	4.504	45.038	45.038	4.504	45.038	45.038	3.478	34.780	34.780
2	1.257	12.572	57.611	1.257	12.572	57.611	2.283	22.830	57.611
3	0.791	7.911	65.522						
4	0.725	7.252	72.774						
5	0.655	6.554	79.328						
6	0.506	5.060	84.388						
7	0.461	4.606	88.995						
8	0.405	4.049	93.044						
9	0.363	3.627	96.671						
10	0.333	3.329	100.000						

Once the two main components have been identified, the original 10 variables can be represented by only 2 latent variables that contain the original variables (Table 7).

Table 7. Factor loads.

	Component	
	1	2
Q1	0.747	0.195
Q2	0.670	0.264
Q3	0.801	0.097
Q4	0.700	0.370
Q5	0.759	0.201
Q6	0.782	0.208
Q7	0.272	0.789
Q8	−0.004	0.822
Q9	0.309	0.619
Q10	0.300	0.516

The factor loads shown in Table 7, obtained after Varimax rotation, represent the correlation coefficients (degree of concordance) of the original variables with the newly created latent variables (factors); this means that the first factor consists of 6 variables (Q1–Q6) satisfaction with infrastructure and service, while the second factor consists of 4 variables (q7–q10) satisfaction with natural and cultural content; these two components were separated only in order to adequately assign weights to the variables in the Composite satisfaction index structure. A large number of composite indicators were created exactly in this way. Hence, the composite satisfaction index will consist of two sub-indices.

The relative significance of each question, or dimension of satisfaction is weighted. The weights assigned to these dimensions (questions) are proportional to the values of factor loads and the percentage of variability that explain the main components (factors) of which they are composed.

The highest weight is assigned to Q3 (0.1404), which means that the component Q3-satisfaction with the supply of services for vessels in Montenegro-has the greatest importance in the structure of the index. The lowest weight is assigned to Q10 (0.041), which means that the least important in the structure of the index is the sense of security during the stay in Montenegro (Table 8).

Table 8. Ponders assigned to nautical destination components Q1–Q10.

	Ponder
Q1	0.1310
Q2	0.1174
Q3	0.1404
Q4	0.1228
Q5	0.1331
Q6	0.1371
Q7	0.0627
Q8	0.0653
Q9	0.0492
Q10	0.0410

Lastly, in order to further assess the attitudes of nautical tourists, we examined the significance of the difference in the satisfaction index between the categories of respondents according to the length of their stay in Montenegro.

According to the results shown in Table 9 above, the most satisfied are those who stayed at the destination the shortest over the observed period (average satisfaction level is 4.23).

Table 9. Descriptive measures of the Composite satisfaction index, considering the length of stay.

	N	Mean	Std. Deviation	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
Up to 3 days	114	4.2322	0.50536	0.04733	4.1384	4.3260	3.24	5.00
3–7	174	3.9038	0.48922	0.03709	3.8306	3.9770	2.91	5.00
7–14	129	4.0845	0.53937	0.04749	3.9905	4.1785	2.76	5.00
More than 14	183	3.9311	0.68914	0.05094	3.8306	4.0316	2.13	5.00
Total	600	4.0134	0.58269	0.02379	3.9666	4.0601	2.13	5.00

Testing the significance of the difference in the mean values of the Composite satisfaction index was carried out using ANOVA. The obtained results (sig. < 0.0001), point to the conclusion that there is a significant difference in the mean values of the Composite satisfaction index with regard to the length of stay. The impact of the length of stay on the level of satisfaction was not measured, ANOVA was only applied in order to determine whether or not there is an effect of the length of stay on the level of satisfaction. In other words, the length of stay as a factor has a significant effect on the level of satisfaction, as expressed by the Composite satisfaction index (Table 10).

Table 10. Results of ANOVA test.

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	9.443	3	3.148	9.673	0.000
Within Groups	193.937	596	0.325		
Total	203.380	599			

4. Discussion

4.1. Segmenting Demand to a Sustainable Destination Supply in Montenegro

We conducted a survey of boaters' attitudes in 2021, while there was still a partially limited movement caused by the global Covid 19 pandemic. According to MONSTAT, decline in statistics (number of arrivals of foreign vessels-NoV and nautical tourists-NoT) 2020 (NoV-1858; NoT-7458) in relation to the most successful 2019 (NoV-4775; NoT-28562) recovered quickly in 2021 (NoV-4176; NoT-25123) [15].

According to the survey findings, 95% of nautical visitors to Montenegro in 2021 were older than 25 years. The age structure trends correspond to those recorded in the EU, where the average age of nautical tourists is seeing a shift from 45 to 55 years of age [42]. In Montenegro, nautical tourists aged from 46 to 60 and over account for the largest share (48.2%).

Given the limited spatial and carrying capacity for the development of nautical tourism in Montenegro (295 km long stretch of coastline) [43], (compared to Croatia (5835 km, 1777/4058 km mainland and islands shoreline) [44], nautical tourism policy-makers in Montenegro should focus on high-end section of demand that will bring the greatest benefits in the context of long-term sustainability, with the least burden on the carrying capacity. Comparing the survey findings with the ones from a similar survey done in 2017 for the East Adriatic, in neighbouring Croatia [45], today one of the most wanted nautical

tourism destinations globally [16], we observed quite similar features for this segment of tourism demand concerning the age, but also some differences in terms of the education profile and income levels. Thus, for instance, in Croatia university graduates accounted for 50.6% of all respondents, while in Montenegro the share was significantly higher, as much as 79.8%. The survey has also shown considerable loyalty to the destination, because the share of nautical tourists who visited Montenegro two times and more is 75.8%, being somewhat lower in case of Croatia with 68.5%.

Croatia, very much like Montenegro, with around one-fourth of GDP (24.9%) accounted for by tourism [46] with over 120 mil Euro (918 mil HRK) income from nautical tourism [47], has twice lower share of nautical tourists with monthly income below 2000 Euro (Cro. 10.8%-Mne. 21.6%); likewise, the share of those with monthly income above 10,000 Euro is comparatively higher (Mne. 11.6%-Cro. 7.3%). Despite some oscillations in the shares of peripheral categories, our survey confirmed that the East Adriatic coast is mostly visited by nautical tourists holding university degrees, of strong purchasing power, with a monthly income over 3500 Euros (Mne. 52.8%-Cro. 55.9 %) and with a higher level of expectations in relation to a responsible attitude towards nature and sustainable development.

The findings were structured with this in mind, leading to the conclusion that the target segment-nautical tourists with higher purchasing power (with income over 3500 Euros per month) represent more than half (61.3%) of those who are in Montenegro for the first time, and most of them (59.4%) do not plan to stay for more than 3 days. Structuring the findings concerning the preferred categories, we concluded that nautical tourists with higher purchasing power are the least satisfied with the natural resource management, unlike the lower income ones who lack leisure amenities the most. Destination managers should be particularly aware of the fact that as the frequency of visits increases, the degree of satisfaction with certain elements of the offer decreases. The notable exception are Montenegrin natural beauties, which consistently received the highest rating (4.63) from nautical tourists who visited the destination 6 or more times; this leads to the conclusion that, notwithstanding the intensive construction of marinas, natural beauties are the main reason for returning to the destination. However, satisfaction with the attitude towards natural assets, as a basic development resource, is progressively declining, as the frequency of visits increases. Complementary trends are also seen in relation to the length of stay, where all components are best rated by nautical tourists who stay the shortest (up to 3 days). Staying longer, nautical visitors begin to notice more acutely the shortcomings in the attitude to nature, the supply of services for vessels, beach facilities and leisure amenities, restaurants, and general destination arrangements. The ANOVA test confirmed that the degree of satisfaction depends on the length of stay, i.e., the analysis of the composite satisfaction index shows that the most satisfied are those who stay the shortest.

The issue of safety and security is not raised, because the destination, viewed from the angle of safety of navigation, especially the Bay of Kotor, is a natural protected harbour, while the fact that Montenegro has been a member of NATO since 2017 contributes to the feeling of overall security. On the other hand, the lack of an appropriate supply of services for vessels is one of the central issues to be addressed in developing Montenegro as a nautical destination.

4.2. Measures and Competencies

Based on the above survey findings, while developing proposed actions, given the absence of a nautical tourism development strategy, and aspiring to sustainability, the measures to be taken were grouped according to different stakeholders: measures within the competence of the central government; measures within the competence of coastal municipalities; and measures to be taken by individual providers.

Measures proposed are based on the division of competencies in Montenegro and include: drafting a strategy for nautical tourism development until 2030, redefining planning documents, forming a single nautical destination product, managing marine protected

areas, revising the anchorage plan, addressing beach quality, infrastructure management, development of regulations and measures in the field of education and training.

4.2.1. Measures under the Responsibility of Central Government

In line with the above, the measures that fall under the ambit of the central government include the following:

- Adopt the Nautical Tourism Development Strategy by 2030, as an umbrella document, to be developed by the ministry responsible for tourism and the active participation of the expert public (the University of Montenegro-the Institute for Marine Biology, the Faculty of Maritime Studies and the Faculty of Tourism), local communities and other stakeholders;

- Redefine planning documents while respecting sustainable carrying capacity and involving the interested public;

- Extend the coverage of marine protected areas to particularly vulnerable parts of the water area (Government of Montenegro, the Ministry of Ecology, Spatial Planning and Urbanism, 2021) with clearly defined navigation conditions;

- Develop a register of berths in the context of redefining the anchorage plan towards reducing the number of illegal moorings for pleasure boats;

- Integrate all pertinent stakeholders into a single nautical destination product;

- Improve the offer and quality of beaches through the Public Company for Coastal Zone Management;

- Plan and develop transport and power supply infrastructure (under state jurisdiction) in order to support the improvement of the quality of nautical tourism supply;

- Amend legislation towards establishing a sustainable destination;

- Accredit specialised educational programmes required for sustainable nautical destination development.

According to the results of the survey based on the composite index, special measures relate to component Q3-Supply of services for vessels in Montenegro. In that context, the central government is obliged to additionally encourage investments in service capacities intended for the repair and regular maintenance of pleasure boats by planning and developing relevant infrastructure. Lack of skilled staff is one of the development barriers for nautical tourism, both in Montenegro and in other European countries [43,48], requiring additional support by relevant authorities to develop customised nautical tourism training programmes. Experience related to the COVID-19 crisis indicates the need to prepare for the “new normal”, in which tourists will avoid mass gatherings by demanding an optimal mix of nature-based experiences, offering yachting tourism a distinct opportunity [49]. In this regard, the state will fulfil its role in supporting sustainable destination management if it starts redesigning planning documents and legislative alignment timely, applying EU recommendations concerning maritime spatial planning (MSP) and integrated coastal zone management (ICZM), as related processes that should lead to long-term sustainable use of coastal and maritime space, by rationally allocating and coordinating development policies of different pertinent sectors [50].

4.2.2. Measures under the Responsibility of Local Governments

Apply to six coastal municipalities: Herceg Novi, Tivat, Kotor, Budva, Bar and Ulcinj. Local governments are perhaps the most important institutional bodies in the context of the expansion and development of marinas and related activities [51]. The development of the strategy, viewed from the macro level, puts the activity in focus, while the coastal municipalities in this process should primarily take into account local resources. In this way, subordinating activities to the resources available [52] fosters sustainable nautical destination development. In this context, measures within the responsibility of local governments should be integrated into the actions taken by the central government in reference to development policy planning in order to enhance the supply and increase the satisfaction of nautical tourists, mindful of protecting the interests of local communities, natural and other resources. The specific measures include the following:

- Prepare for taking part in drafting the Strategy for Nautical Tourism Development until 2030;

- Redefine local planning documents respecting sustainable carrying capacity and involving the interested public;

- Active participation in preparation for extending the coverage of marine protected areas (MPA) within respective municipal territories;

- Active participation in redefining the anchorage plan, taking into account the interests of the local population;

- Involvement of local self-governments and local tourism organisations in providing a single nautical destination offer;

- Support the Public Company for Coastal Zone Management in the process of improving the offer and quality of beaches;

- Planning and development of relevant utility and traffic infrastructure (under municipal responsibility) towards improving nautical destination offer;

- Active participation in amending legislation towards establishing a sustainable destination;

- Improve the offer of communal ports towards establishing a sustainable destination.

4.2.3. Measures under the Responsibility of Individual Providers and Stakeholders

Research shows that nautical tourism managers are focused on the requirements of nautical tourists in relation to what they offer, while the rest is regarded to be of less importance [53]. However, although some aspects such as Q2 (Marina-based services), Q4 (Hospitality offer) and Q7 (Culture and history), are rated high, their future sustainability hinges on the quality of multifaceted destination management. For this reason, it is necessary to encourage the active participation of individual providers in the preparation and implementation of development policy measures in the context of sustainable destination management. Increasing the satisfaction with the destination offer, particularly among the preferred categories of nautical tourists, the assumptions are being put in place for reducing seasonality, repeated visits and longer stays, and more profitable operation with optimal utilisation of available resources. The measures pertinent to individual providers and stakeholders include the following:

- Participate in and support the development of the Strategy in line with sustainable development principles;

- Revise own development plans in line with the Strategy for Nautical Tourism Development until 2030;

- Provide environment-friendly vessels for visiting MPAs;

- Active participation in redefining the anchorage plan, taking into account the protection of the interests of current providers;

- Organisational and financial support for the establishment of a single nautical destination offer;

- Information provision and awareness raising among nautical tourists towards the preservation of pristine coves and beaches;

- Support to the development of services towards improved destination operation and sustainability;

- Active participation in amending legislation towards establishing a sustainable destination;

- Support for the development of training and upskilling programmes to develop skills required for sustainable nautical destination development.

5. Conclusions

Starting from the premise that the sustainability of nautical destinations depends primarily on high-quality destination management, it is recognised that Montenegro, as a Mediterranean destination composed of excellent, but limited natural assets for the development of this type of tourism, has been intensively developing reception capacities and recorded a tremendous increase in the number of nautical tourist visits, but still lacks the strategic framework in this field.

The extraordinary natural beauties of the Montenegrin coast are of interest to various investors. However, the lack of a quality systemic response leads to conflicts in making decisions about their use of the coasts; this issue often results in unbridled urbanisation. In this respect, Montenegro is no different from most developing destinations, which continues to raise serious concerns about the states of the coastal and marine environment.

Capacity constraints place a heightened focus on sustainable destination management, which prioritises those activities that will bring the greatest benefits with the least negative effects. Given that nautical tourists are recognised as high revenue generators, and as environmentally responsible, the development of this segment of the destination offer is in line with the overall development priorities. Bearing in mind that each type of selective tourism has a basic motivation that often differs from others and focuses on a certain type of offer, we explored the attitudes of nautical tourist to ensure long-term destination sustainability by defining product management measures. All categories of surveyed nautical tourists expressed a high degree of satisfaction with the natural beauty and quality of marinas in the Montenegrin part of the Adriatic. The environmental concerns, availability and management of beaches, and the supply of services for vessels, on the other hand, are the segments that reduce the destination's competitiveness in the nautical market. Destination sustainability, to be achieved through strategic management mindful of the limited spatial resources, should focus on high-end nautical tourists and meet their expectations. Given that this category is predominant among those who stay the shortest and have the lowest frequency of visits, the goal is to optimise and differentiate the product to meet their expectations, to encourage repeat visits and longer stays; these are the lines along which the survey, the first of its kind in Montenegro, was conducted. By linking the field survey results and the appropriate scientific assumptions, we have come up with a proposed set of measures for putting in place a sustainable destination management model.

The limitations encountered during the survey refer to the lack of more comprehensive statistical data and published research papers concerning this destination specifically, and the initial misunderstanding of some providers about the need and importance of establishing destination management underpinned by relevant research.

Possible implications of the survey findings primarily refer to speeding up the drafting and adoption of a strategy for nautical tourism development in Montenegro, and a better understanding of the need to model sustainable destination management through scientific research.

We are confident that the findings of this research will be applicable both in Montenegro and in other destinations that are developing this segment of the tourist supply. Finally, surveying nautical tourists' attitudes about Montenegro as a nautical destination should continue in future, in order to ensure continuous alignment of the sustainable destination management model by linking it with the results of the research.

Author Contributions: Conceptualisation, Z.K. and S.Š.-I.; methodology, Z.K. and S.Š.-I.; software, Z.K.; validation, Z.K. and S.Š.-I.; formal analysis, Z.K. and S.Š.-I.; investigation, Z.K.; resources, Z.K.; data curation, Z.K.; writing—original draft preparation, Z.K.; writing—review and editing, S.Š.-I.; visualisation, Z.K. and S.Š.-I.; supervision, S.Š.-I. All authors have read and agreed to the published version of the manuscript.

Funding: This research received no external funding.

Institutional Review Board Statement: Not applicable.

Informed Consent Statement: Not applicable.

Data Availability Statement: Data extracted from the WoS search, books, questionnaires in electronic and analogue form, statistical processing and other data used for the analyses will be available upon request to the corresponding author.

Conflicts of Interest: The authors declare no conflict of interest.

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