

Highlights of consumption and satisfaction in nautical tourism.

A comparative study of visitors to the
Canary Islands and Morocco

Elementos clave del consumo y la satisfacción en el turismo náutico. Estudio comparativo entre las Islas Canarias y Marruecos

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Abstract

Nautical tourism is considered to be an under-exploited research area, taking into account its evolution and growth prospects. The present study was conducted with nautical tourists during their visit to the Canary Islands and Morocco between 2013 and 2014. Our aim is to better guide the creation of new joint businesses by determining the most demanded activities among the nautical tourists that visit this part of the world. Some findings indicate that tourists' consumption and satisfaction vary between a nautical tourist that sails and a tourist motivated by other nautical activities, regardless of the destination they choose. The study also differentiates the nautical tourists' preferences according to the most popular activities carried out at the destinations they are visiting, highlighting the role that resources such as "sea" and "nature" play as the main tourists' motivations behind the trip. Finally, the results also reveal which elements of the nautical tourism products and services in offer are the current destinations' weaknesses, according to the nautical tourists.

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Keywords

Nautical tourism, nautical destination, preferences, consumption, satisfaction, sea.

Resumen

El turismo náutico se considera un área de investigación escasamente explotada, si se compara con la evolución y perspectivas de crecimiento del sector. El presente estudio fue realizado con turistas náuticos durante su visita a Canarias y Marruecos entre los años 2013 y 2014. La investigación tiene como objetivo guiar y apoyar la creación de modelos de negocio conjuntos, basados en la determinación de las actividades más demandadas entre los turistas náuticos que visitan ambas regiones. Los resultados indican que el consumo y la satisfacción varía entre un turista náutico navegante y uno motivado por otra actividad náutica, independiente al destino que se encuentren visitando. Este estudio también identifica las preferencias de los turistas náuticos, tomando en cuenta las actividades más demandadas en los destinos, y resaltando el rol de recursos como el “mar” y la “naturaleza” como las principales motivaciones de estos viajeros. Finalmente, en los resultados se revelan los elementos de la oferta náutico-turística que son percibidos como debilidades del destino, de acuerdo a la opinión de los turistas náuticos.

Palabras clave

Turismo náutico, destino náutico, preferencias, consumo, satisfacción, mar.

Introduction

Nautical activities have great potential for the socio-economic development of tourism because of the multiplying effect they generate in the economy. Some of the attributes that reinforce this statement are the generation of stable and qualified employment; easy fit with other tourism packages; lack of seasonality; promotion of other services; and the impetus they provide to the qualification and diversification of the coastal infrastructures and their technological innovation (Carrasco 2001). Nautical recreational activities have also an increasing capacity to adapt to new trends in tourist demands, as well an elevated attractiveness to a market segment with a high socio-economic level and purchasing power. This, in turn, reinforces the high profitability potential (Mateos 2010).

Nautical tourism, still considered an under-studied field in Spain (Gómez 2012), has been defined as a strategic sector with a significant role in the development of tourism in the country. There is wide recognition among governments, universities, businesses

and other agents of the need to improve and qualify tourism products and services in the country, as well as to strengthen other potential factors offered by the nautical sector. These possibilities are supported by different studies carried out globally that demonstrate the economic impact of this activity, its stimulating nature for the coastal areas, and the business volume it generates (Carrasco 2002; Vadell 2005).

The qualities possessed by the Canary Islands a nautical destination are widespread. Some of their key elements are their strategic position in the middle of the Atlantic, the natural conditions of the islands, the climate and the beauty of their coastal landscapes, as well as their status as a nautical destination (in Spain) and as a top quality tourism destination (in Europe). The fact that some of the most important nautical events in the world, such as the Atlantic Rally for Cruisers (ARC, the longest trans-oceanic regatta in the world) take place here every year emphasizes the catalyst capacity this segment possesses for the tourist sector in the archipelago.

The qualities of the Canary Islands as a nautical destination and the need to reinvent their offer as a mature location turn the nautical sector into an opportunity for their sustainability as a tourist destination (Parreno 2008). Such is the conviction that the Canary Islands can be positioned as a nautical destination of excellence that the local Public Administration has made a commitment to specialise the archipelago in nautical tourism with public strategies already in place to motivate the planning, diversification of the supply and demand, the competitiveness, and the international promotion.

Morocco, on the other hand, with excellent natural conditions (coastline with high capacity to adapt to different uses, good climate and strategic position in the pathway from the Mediterranean to the Atlantic) stands as an emerging nautical destination. In recent years, there has been an effort to revalue the sector, an idea supported by a political desire. This has resulted in new dynamics for this sector, particularly in the construction and modernisation of installations (ports and marines), the import and sales of recreational vessels, promotion for the starting up of nautical companies, and the concern around professional training and communication, as it is considered a sector with wide economic opportunities for the country.

The geographical proximity between Morocco and the Canary Islands, their complementary strategic position in the pathway from Europe mainland to America, their natural and similar conditions (climate and waters), the recent and dynamic evolution in the Moroccan tourism sector, and the commercial and political understanding between these regions, constitute opportunities for the joint development of the nautical industry. It is also believed that combined nautical tourism packages wide the spectre of market opportunities for the Canary Islands and represent a significant catalyst for the positioning of Morocco in the sector. Furthermore, public administrations of both regions are keen to undertake the desired transformation of the nautical sector on a mutual basis.

The renovation of nautical tourism is denoted as being a very complex process in academic literature, mainly because of the large number of agents and factors that take part (Rebollo and Castiñeira 2010). To achieve the objectives, it is not enough to have political disposition and economic promotion in place, as the creation of tools and knowledge are essential to allow the development of effective innovation strategies, based on the analysis and the suitable interpretation of the problem, the objectives, the peculiarities and complexities of the sector, the market and the destinations.

The final purpose of this paper is contributing to a better guidance for the creation of new joint nautical products and services by ranking the activities most demanded by the nautical tourists that visit this part of the world. The comparative study is enriched by having a segmented valuation of nautical tourists that are choosing a popular nautical destination and an emerging one.

Background

The nautical sector is characterised as being multifunctional, as it covers a wide and growing number of maritime activities. This multivariable nature means that the definition of nautical tourism may take on different focuses in scientific literature (Luković 2007). The most global concept nowadays defines nautical tourism as a segment of people motivated by leisure, recreation and sports related to the sea (Carrasco 2001), or indeed with intentions to carry out a tourist activity at the destination with a clear maritime component (Luković 2007).

Similarly, nautical tourism can take on different forms. The most studied in the academic and scientific fields are cruises, nautical sports (sailing with or without one's own boat) and chartering of boats (rental of boats for recreation or diving, with or without the ship's master). These are catalogued by many authors as key sub-segments of tourism because of the high economic profitability they generate.

One characteristic that these modalities have in common is that they are generally developed in

ports, which obviously vary considerably in their structures, services, magnitude and main activities. Even when the offer of Recreational Nautical Installations (RNI)¹, schools and training centres are very wide and varied in Europe, it is the Marinas that maintain their role as the most important element and commercial capital of the nautical tourism industry (Besteiro 2004; Luković 2012).

There are other modalities within the sector that are considered with certain interest in scientific production in recent years, because of the role that they are taking on in the diversification of the nautical

offer at tourist destinations and the boom they are experiencing in tourism preferences at a global level. This refers to recreational nautical tourism, which are those tourists that travel to do water sports. These activities are generally based at any type of RNI but also on the coast or beach, depending on their characteristics (Gómez 2012).

A classification of the main modalities of nautical tourism is presented in Figure 1. Various authors include chartering as a recreational nautical activity (Gómez 2012), but because of its importance according to the majority of scientific publications, it has been separated in the present classification as an independent modality. Training, for any of these activities, but particularly those related to recreational nautical activities, has become part of the nautical services in many European destinations.

1. The different types of RNI in Spain were established in 1975, by the Ministry of Public Works and Urbanism. The RNIs are classified as: Port, Marina or Maritime City, Dry Dock, Wharf, Maritime Base, Dock, Harbour and Marina Village (Gómez 2012).

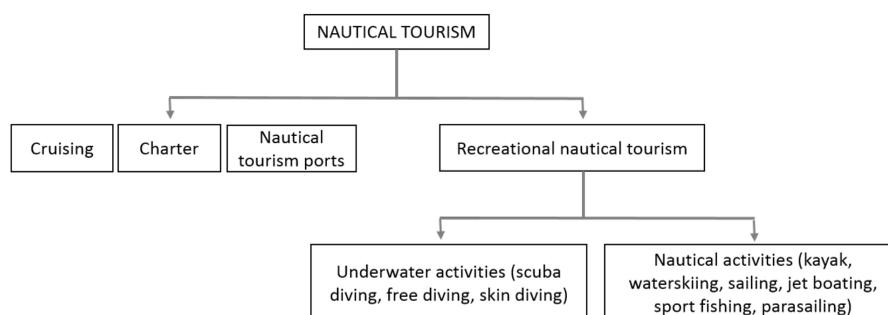


FIGURE 1. Main modalities of nautical tourism. Source: prepared by the authors.

For now, it is possible to conclude that the common characteristic between all the definitions of nautical tourism is the direct relationship between the tourist and the sea. In fact, for nautical tourism, the water resource is considered by many authors as the main motivation behind the tourist's trip. This relationship has led to another common denomination that emphasises the role of the sea

as a resource, known as "maritime tourism" as well as other more specific sub-segments, referred to as "yachting tourism" or "sailing tourism", which are directly related to the activity being carried out (Luković 2012).

Furthermore, experienced contemporary authors confirm that globally, science is not committed to the sector, a fact that is revealed in the low number

of investigations, particularly in universities. This scarce scientific production is not keeping pace with this sector's economic growth and prospects, even in times of global economic crisis. Authors also consider that it is precisely because of this lack of knowledge production that the sector has not probably reached its maximum (Luković 2013).

The services offered at the Recreational Nautical Installations (RNI) have been one of the few topics developed in scientific literature related to nautical tourism. In an RNI the services can be classified by using four criteria:

- a. Basic services
- b. Peripheral services, which are directly related to the boats (electricity, water) or the equipment (fuel, maintenance, etc.)
- c. Basic derived services that are not necessarily linked to the basic services (toilets, swimming pool, dry docks, and training centres)
- d. Complementary services, those not linked to the nautical activity (e.g., the leisure and recreational tourism activities away from the sea) (Chapapría 2000).

Research has revealed that, generally, managers of nautical installations tend to prefer offering services directly related to the needs of the boat users (safe drinking water, toilets, electricity, fuel), and consider the rest as less important (Chapapría 2000). In that regard, there are authors that believe that this is the main problem in the design of nautical products offered to tourists. They believe that it is often conceived from a business perspective by the owners and not from the point of view of the nautical tourists and what they demand, which clearly has to be the key to success (Kovačić and Gržetić 2008).

Correct structuring of what is on offer will allow existing demands to be addressed or at least to focus on a potential demand (Chapapría 2000). The diversity and combination of products and services are important variables affecting the motivations behind the demand of nautical tourism, as well as the concerns for environmental and sustainable management of the marinas (Carrasco 2002; Jugović et al.

2011). In academic literature, some authors analyse the relationship between nautical tourism and environment; we can mention Marin et al. (2008), Horak et al. (2006), Hall (2001) and Jordan (2000).

Some authors have considered that not only the correct combination of nautical activities, but also the integration of tourist services offered at the nautical destination constitutes a determining factor in the development of this type of tourism (Mateos 2010; Rivera 2010). In relation to that, scientific literature on tourism has revealed that the positive experiences that tourists have in general with respect to the other resources at the destination, can have an impact on their future behaviour as far as their intention to repeat the visit or recommend the destination to friends or family members (Chen and Tsai 2008). Therefore, a positive experience for the nautical tourist regarding the offer of tourism products and services is key for the growth and development of the destination.

In a European context there are various studies mentioning that the combination between the nautical sporting offer, the recreational offer (especially underwater activities and fishing, sailing training and scuba diving), chartering, and the tourist offer (e.g., celebration of events), are successful trends for some destinations (Carrasco 2002). In Spain some studies indicate that the business models with greater economic potential for the development of nautical sports are those that also include chartering, the Nautical Stations², and the nautical recreational activities (underwater sports, sailing and sport fishing) (Méndez de la Muela 1998). Furthermore, there have also been studies in Spain about the relevance that the creation of nautical products supported by complementary tourism activities at the destination could have on the sector's development (Chapapría 2000).

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² The concept of Nautical Stations was promoted within the framework of the Plan of Competitiveness of Spanish tourism (1996), and motivated the creation of the concept of the "Nautical Stations" as an integrated nautical tourism product (Méndez de la Muela 1998).

All of the above denotes the importance of the study of the demand preferences in nautical tourism because of the role it plays in the sector's development. Establishing policies for nautical tourism has to be oriented towards the market, focused on the new trends and from the perspective of tourism packages that provide a natural transition between land and sea, thus generating other activities of economic interest related to different types of attraction, even with the inhabitants themselves (Mateos 2010). There are few scientific publications covering this idea.

For example, some authors have investigated the negative factors associated to the lack of demand for nautical tourism. The case study conducted in Serbia was based on the three dimensions of the Crawford and Godbey model (1987). The first (intra-personal) negative factor of the demand for nautical tourism was related to fear (to the nautical activity, to the lack of ability to swim and even to traveling alone). The second factor was not considering nautical activities as a personal interest (personal), or not having sufficient time or money (physical) to do them; these are considered structural factors. The third one was the influence of the person's social circle (interpersonal) such as the travel agency, family, and friends (Jovanovic et al. 2013). Other study carried out in Croatia showed that the security of the marinas has an influence on the satisfaction of those seeking to do nautical tourism (Horak 2013). Other factors such as loyalty and satisfaction, also determine the behaviour of the nautical consumer (Znidar 2010). This information is a useful tool for the understanding of this market in a context albeit different to the studied.

Some investigations undertaken in Spain show that climate, culture and nature are the aspects that most influence tourists when it comes to choosing a destination for nautical tourism. It was also determined that the transfer of nautical tourists from the base port to other places, and the climate, diversity, quality of the services and the distance itself (Carrasco 2001) all played a key role. In the Canary Islands

in particular, such discoveries related to the sector are scarce. The most recent publication shows that for nautical tourists the fact of having done water sports in other places beforehand has a direct influence on their motivations and decisions to return to the destination of Gran Canaria. This perspective values the attributes of the tourist per se, and their link to the decision making process (Suárez et al. 2013).

In Morocco, the scientific publications on nautical tourism are almost non-existent. Summer is clearly peak season for the coastal areas, which has a positive effect on the practice of nautical-recreational sports at that time (Guibert 2013).

Methodology

The enormous flexibility and integration that exists between nautical sports, recreational activities and tourism at the studied destinations allows us to establish very wide concepts and profiles for nautical tourism packages. The target market for nautical tourism was divided into three sub-segments for the purpose of this study:

1. Port users with boats based at a port
2. Port users in transit with chartered boats at a port
3. Tourists that usually do recreational nautical activities

The sample was organised into two separate groups that hereon shall be referred to as "yachtsmen" and "nautical tourists". They constitute the first potential market for the new joint products. The study does not include the segments associated with cruisers. The structure of the questionnaire in both cases was the same in order to facilitate the comparison of common aspects (Figure 2).

Two types of questionnaire were developed:

1. A structured questionnaire aimed at boat users based or in transit at the marinas of both regions (yachtsmen).
2. A structured questionnaire aimed at water sport lovers that do recreational nautical sports (nautical tourists) during their stay in the Canary Islands or Morocco. If the tourists interviewed had never done water sports, the data were considered as null.

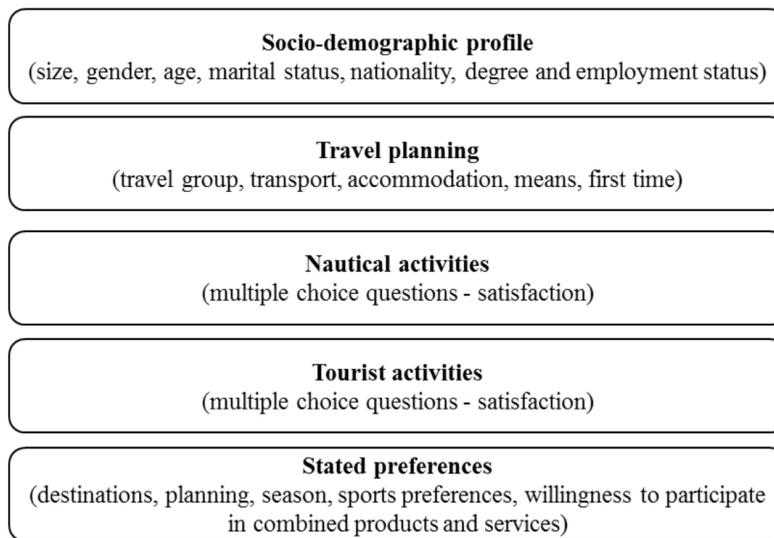


FIGURE 2. Questionnaire structure for yachtsmen and nautical tourists in both regions. Source: prepared by the authors.

With regards to the method used for collecting the information, for this study we chose the exploratory sample method and carried out direct and individual questionnaires because of the advantage of the personal interview for obtaining information otherwise not directly observable. The port is the only RNI evaluated, given that it is the only installation that has been visited by the whole sample. However, the questionnaires were conducted at ports, clubs, sport centres, beaches, hotels and the main rental points of nautical equipment, in both regions, from November 2013 to June 2014.

For the case of Morocco the study was focused on a specific touristic region, the Souss Massa Drâa, one of the most important coastal tourism destinations in the country. In this region there is only one marina, which is located in the city of Agadir. Finally, a sample of 433 nautical tourists and

yachtsmen was obtained with a confidence interval of 95% for the whole sample.

This sample was composed mainly of European men, married, with a mean age prowling the 38 years. The scarce presence of women may be justified by the fact that nautical sports are still perceived as a segment reserved mainly for men (see Table 1). A high level of education and qualified workers and businessmen are also common aspects within the sample.

With respect to the profiles of yachtsmen and nautical tourists respectively, there are some similarities regardless the destination they are visiting at the moment of being interviewed. For example, the lower ages of the sample are concentrated within the group of nautical tourists that usually do recreational nautical activities and the Spanish nationality is concentrated within the group of sailors. For this reason, all the following results are presented in a segmented way.

TABLE 1. Socioeconomic and demographic profile of the respondents.

Aspects		Canary Islands	Agadir
Size	Yachtsmen	127	32
	Nautical tourists	158	116
Gender	Yachtsmen	Men (85 %)	Men (96, 9%)
	Nautical tourists	Men (51 %)	Men (71%)
Age	Yachtsmen	46-65 (51 %)	More than 40 (59%)
	Nautical tourists	25-34 (29 %)	More than 64 (31%); 25-34 (20%)
Marital status	Yachtsmen	Married (67 %)	Married (62%)
	Nautical tourists	Married (39 %); Single (31 %)	Married (63%)
Nationality	Yachtsmen	Spanish (47 %); German; British	Spanish (59%)
	Nautical tourists	British (30%); Norwegians; German	French and German (30%)
Degree	Yachtsmen	Middle & Higher education (66 %)	Higher education (59%)
	Nautical tourists	University (49 %)	University (63%)
Employment status	Yachtsmen	Businessman, qualified workers and technicians (47 %)	Retired (28%); Civil servant (25%)
	Nautical tourists	Worker-autonomous (47 %)	Retired (34%)

Source: prepared by the authors.

Results

Travel planning

The first aspect analysed in this phase was the composition of the travel group. As a significant feature we can observe that this aspect varies between yachtsmen and nautical tourists motivated by recreational nautical activities but it does have a very similar structure for both regions. The interviewed yachtsmen generally travelled in a group, usually with friends or family members, whereas the nautical tourists in the sample chose often to travel with a partner. In both regions and groups there was a low percentage of persons travelling alone (see Table 2).

Secondly, the transportation method used by the travellers was also analysed. To reach their destination, nautical tourists came by plane in almost all of the cases (99% for the Canary Islands and 84% for Morocco). Only 1% of the interviewed nautical tourists came by boat to the Canary Islands. However, nautical tourists visiting the Moroccan coasts also chose to come by ferry (12% of those interviewed). Yachtsmen, however, used only their own boats to reach their destination.

Another aspect of the questionnaire looked into accommodation. Results show that nautical tourists typically used hotels. 85% and 94% of the yachtsmen in the Canary Islands and Agadir –respectively– used their own boat as accommodation. In a few cases hotels were chosen (more in the Canary Islands).

TABLE 2. Travel planning variables

Aspects		Canary Islands	Agadir
Composition of the travel group	Yachtsmen	Friends (33 %); Family (28 %)	Friends (37%); Family (19 %)
	Nautical tourists	Couple (46 %); Friends (23 %)	Couple (62%); Friends (23 %)
Method of transport	Yachtsmen	Boats (100 %)	Boats (100 %)
	Nautical tourists	Plane (99 %)	Plane (84 %)
Types of accommodation	Yachtsmen	Boats (85 %) Hotel (15 %)	Boats (94 %) Hotel (6 %)
	Nautical tourists	Hotel (87 %)	Hotel (100 %)
Means to finding out about the destination	Yachtsmen	Internet (41 %); Events (29 %)	Events (31 %); Internet (23 %)
	Nautical tourists	Friends (28 %); Internet (27 %)	Friends (35 %); Internet (31 %)
First time as nautical tourists	Yachtsmen	Yes (20 %)	Yes (9 %)
	Nautical tourists	Yes (0 %)	Yes (42 %)

Source: prepared by the authors.

With reference to finding out about the destination, the Internet and recommendations from friends were the most common means used within the sample for both regions. The results obtained show that yachtsmen tended to prepare their trip earlier than nautical tourists, even when they had the transportation method at their disposition. This can be explained by the fact that in both regions there is a significant number yachtsmen traveling to participate in different nautical events, which requires various months of planning.

Finally, in relation to the reason behind the trip, all of the interviewees confirmed it was for nautical tourism. The majority had already had some previous experience in doing nautical activities at other destinations. The results by segments denote that among the yachtsmen that travelled to the Canary Islands, there were more amateurs (their first time) than those that travelled to Agadir. In the same way, among the nautical tourists that travelled to Agadir, there was a greater proportion of people that had never done recreational nautical sports before (see Table 2). The majority of those interviewed revealed

that their reason for travelling was to do nautical sports and recreational activities. With regards to the yachtsmen, in both regions, an additional reason behind the trip was participating in programmed crossings or organised events (regattas).

Nautical activities

As mentioned earlier, the port is considered the most important asset in the nautical tourism sector, given that this is where the majority of the recreational and sporting nautical activities take place. A nautical tourist, even when carrying out the activities at the beach, generally tends to spend the evening at a port or marina; and even a tourist that for specific reasons does not carry out nautical tourism (but would like to), tends to prefer areas around the ports or marinas when choosing accommodation. Because of that, many businessmen see the port not only as the base for carrying out the sporting and recreational nautical activities, but also as a tourist product per se. For this reason, we decided to conduct the study around the port, which is clearly the main attraction not only for yachtsmen, but also for nautical tourists in general.

The evaluation of satisfaction with the destination's nautical offer for nautical tourists and yachtsmen was made through a multiple choice question. The interviewees were asked to select those nautical activities most used during their visit. At the same time they were asked to give a value to each activity between 1 and 5, where 1 is "not at all satisfied" and 5 is "very satisfied", taking as a reference their experience during the stay (Table 3).

The collected data allowed obtaining information about the most preferred nautical activities at the destination. In Table 3 we can see a ranking of these activities, per group interviewed, and according to each region. After "sailing", the yachtsmen of the sample did "sport fishing", "chartering", "kayaks" and "surf-windsurf" more often. The satisfaction with the Canary Islands as a destination for sailing is positive, whereas the Moroccan waters were considered below average. Similarly, the Islands have satisfied the yachtsmen, according to their most preferred nautical activities.

For Agadir, other nautical activities presented a satisfaction level below average. The latter evaluation was mainly made according to the yachtsmen's experience. They affirm that there is a lack of quality on the services offered at the ports, and the experience of nautical companies is low, mainly because they are emerging. The low satisfaction perception about sailing in Moroccan waters is due to the attribute "situation and accessibility" of Marina de Agadir. Yachtsmen consider the location of this installation as not ideal for unexperienced sailors. They constantly give values lower than those given by the rest of nautical tourists for both regions, which may be influenced by the more intensive use

of the port and its services for the boats. The qualitative data collected reveals that yachtsmen were not satisfied at all with the basic services offered at the ports; the evaluations for the supply of fuel, electricity and water were not positive. For the Canary Islands, 54 % of those interviewed evaluated them as "acceptable", showing a lack of satisfaction with some services. For Agadir, more than 42 % of yachtsmen indicated the basic and peripheral services as being "good".

With respect to the nautical tourists, the overall satisfaction generated by the Canary Islands for doing nautical sports was good. The most common activities carried out by them are presented in Table 3. We can also see some common areas between the two regions, which means that preferences are likely similar even when they are choosing different nautical destinations. The satisfaction with Agadir as far as the specific activities indicated is still average.

Finally, we have been able to confirm that none of the aspects were given high values, which means that the products and services on offer at both regions require some improvements in order to meet the expectations of nautical tourists. It is worth noting that for Agadir, although the evaluations were slightly inferior, they were similar to those of the Canary Islands, despite the fact that it is considered an emerging sector with fewer infrastructure, products and services. This denotes, on one hand, that the conditions of the nautical destination are equal to those in Spain, and on the other hand, that there are factors affecting the overall satisfaction.

TABLE 3. Level of satisfaction with the most demanded nautical activities at the destinations*

Nautical activities -Yachtsmen			
Canary Islands	Mean	Agadir	Mean
Sailing	4,1	Sailing	2,6
Sport fishing		Sport fishing	
Chartering/Boating		Chartering/Boating	
Surf-windsurf		Surf-windsurf	
Kayaks		Kayaks	
Scuba diving		Jet ski	
Nautical activities - Nautical tourists			
Canary Islands	Mean	Agadir	Mean
Skin diving	3,8	Jet ski	3,3
Chartering/Boating		Chartering/Boating	
Watercraft		Watercraft	
Surf-windsurf		Surf-windsurf	
Water skiing		Sport fishing	
* Sample means. All items were measured on a Likert-type scale (1 = not satisfied; 5 = very satisfied). The table shows the mean values of each group of activities.			

Source: prepared by the authors.

Tourist activities

In relation to the complementary tourist activities, questions regarding accommodation and other activities were asked, giving the possibility to the interviewees to choose which activities they preferred doing during their stay and to evaluate them according to the experience lived. As mentioned above, with regards to accommodation, the preference of yachtsmen was to stay on their boats, whereas the rest of the nautical tourists preferred to stay at a hotel. The satisfaction for accommodation in the Canary Islands was on average 4 (on a scale of 1 to 5 where 1 was “not at all satisfied” and 5 was “very satisfied”). For Agadir, the level of satisfaction for accommodation was 3 on average for the whole sample. In the study, the accommodation location was not defined; it is not known whether the accommodation was at the port itself or in the surrounding area.

With respect to the rest of the tourist products and services on offer at the destination, we can con-

clude that yachtsmen at both destinations tended to “eat out”, “go shopping”, “do evening activities” and “do sports”. In the Canary Islands, 48% of the sample also tended to “do environmental activities”, proving that yachtsmen in these Islands are very interested in activities related to the nature and the sea. In Agadir, 38 % of yachtsmen tended to “make cultural visits”.

The average level of satisfaction of yachtsmen in relation to the complementary tourist products and services on offer at the Canary Islands was medium to high. By analysing the range of the evaluation (where 1 is “not at all satisfied” and 5 is “very satisfied”), the yachtsmen that visited the Islands were “quite satisfied” with the activities carried out. As far as Agadir is concerned, the average level of satisfaction shown by yachtsmen is very low, which may influence the overall general perception of satisfaction with the destination (Table 4).

TABLE 4. Descriptive analysis of the consumption of the tourist products and services on offer at the destinations and level of satisfaction *

Tourist activities - Yachtsmen			
Canary Islands	Frequency	Agadir	Frequency
Restaurants	89 %	Restaurants	69 %
Shopping	86 %	Shopping	59 %
Sports	57 %	Evening activities	50 %
Environmental activities	48 %	Cultural visits	38 %
Evening activities	45 %	Sports	31 %
<i>Level of satisfaction</i>	3.6	<i>Level of satisfaction</i>	2.4
Tourist activities - Nautical Tourists			
	Mean	Agadir	Mean
Swimming	38 %	Swimming	25%
Cycling	10 %	Excursions	16%
Hiking	12 %	Golf	9%
Golf	8 %	Cycling	8%
Paragliding	6 %	Horse riding	7%
<i>Level of satisfaction</i>	3.8	<i>Level of satisfaction</i>	3.2

* Frequency analysis; Level of satisfaction (all items were measured on a Likert-type scale 1 = not satisfied; 5 = very satisfied).The table shows the mean values of each group of activities.

Source: prepared by the authors.

Swimming was the main activity for nautical tourists outside the nautical area: 38% of the sample of Canary Islands and 25% for the sample of Agadir. Additionally, in both locations these tourists chose to do more sporting activities related to the active tourism, such as “cycling”, “golf” and “hiking”, which were different from the reason behind the trip. In this sense, the most popular tourist activities among the visitors are those related to the nature and the sea. The nautical tourists at the Canary Islands are on average “quite satisfied” with the activities at the destination; whereas those at Agadir were “satisfied” at the time of being interviewed (Table 4).

It is important to make note of the similarities that exist between yachtsmen and nautical tourists in relation to the preferences for certain activities, regardless of the destination they chose. It can be assumed that generally, the tourists that travel to do

recreational nautical activities also used their time to enjoy a wide variety of other water sports and activities of active tourism, whereas yachtsmen tended to choose other types of perhaps calmer activities.

Given the evaluations for nautical and tourist activities carried out at the destinations, the interviewees were asked to indicate the intention of recommending the location after their experience and their satisfaction level. The intentions of yachtsmen and nautical tourists to recommend the destinations are high. As far as the Canary Islands are concerned, although for 38.6% of nautical tourists it was their first visit, almost 98% of them were going to recommend the destination. Similarly, but in less proportion (81.9%) yachtsmen would also recommend the Islands and 99% had already visited the islands on a previous occasion. For Agadir, the number of visitors staying for the first time was higher, particu-

larly among yachtsmen (71.9%). In the same way, of all the respondents visiting Agadir (39%) were there for the first time. However, nearly 88% of the interviewees would indeed recommend the destination to other people.

Stated preferences

As mentioned earlier, the questionnaires were implemented individually and in face-to-face contexts, which allowed us to collect qualitative data. Table 5 shows the preferences of yachtsmen and the rest of nautical tourists. According to the most visited destinations, the respondents tend to choose sun and beach and adventure locations, which means that the sea, weather and nature resources are the main motivations behind the trip. With respect to the planning, we can affirm that

the interviewed tourists generally “self-organized” their trips.

Additionally, data regarding the annual travel frequency of nautical tourists was also collected. Sailors tend to travel more than the rest of the nautical tourists per year as average, which probably constitutes a distinctive feature of this group. The summer holidays is the most preferred season for traveling, even when many yachtsmen have affirmed that they do it all over the year if it is possible. Finally, the statements according to the most preferred sporting activities reveal that boaters or nautical tourists did not perform some of the favourite ones. There are two likely reasons behind this: the lack of information or non-existing activities on offer at the destinations. In any case, it constitutes a commercial opportunity for these regions.

TABLE 5. Descriptive analysis of the stated preferences of yachtsmen and nautical tourists.

		Canary Islands	Agadir
Popular destinations	Yachtsmen	Beach (44,3 %)	Beach (31,3%) Adventure (12,5%)
	Nautical tourists	Sun and beach (+90 %)	Beach (73%) Adventure (20%)
Planning	Yachtsmen	Self-organized (35,5 %)	Self-organized (43,8%)
	Nautical tourists	Self-organized (52 %)	
Annual frequency	Yachtsmen	2 a 8 (69 %)	20 (56, 3%) 12 (15, 6%)
	Nautical tourists	1 (75 %)	2(75%)
Season	Yachtsmen	“Others” - all over the year (46 %)	“Others” (32, 5%)
		Summer holidays	Summer holidays (25%)
	Nautical tourists	Summer holidays (69,8 %)	Summer holidays (45%)
Non-nautical sports ranked by preferences	Yachtsmen	1. Horse riding 2. Fishing 3. Paddle 4. Golf 5. River sports	1. Fishing 2. Ball sports 3. Cycling 4. Ski 5. Alpinism
	Nautical tourists	1. Swimming 2. Diving 3. Hiking 4. Charter/Boating	1. Swimming 2. Excursions 3. Paragliding 4. Golf 5. Horse riding

Source: prepared by the authors.

Finally, in order to identify a potential market niche for new joint nautical products within the sample, we implemented a combined question with three sections. Firstly, we inquired into the knowledge and use of the nautical products and services on offer at the other destination; secondly, the perceived difficulties; and thirdly, the willingness to participate in any recreational or sporting nautical activity.

The main results observed for the Canary Islands visitors, was that Morocco was very much known as a destination for nautical tourism. Firstly, all the tourists stated that during their stay in the Canary Islands the most advertised destinations were Agadir and Tunis. Secondly, 75.6 % of the yachtsmen that were on the Canary Islands had already sailed in Moroccan waters. And thirdly, 13.4 % of the sample in the Islands had already used a Moroccan port at some time in their lives. As far as the nautical tourists that visited Agadir, besides the fact that 60 % of the sample chosen were Spanish, the rest of the nationalities knew the Canary Islands very well, and had even visited it, some as nautical tourists and others as beach goers. Yachtsmen in Agadir also stated what their favourite places for sailing were: Spain (in the first position of the ranking), followed by Portugal and in third place, Agadir itself. This extensive level of knowledge and use of what is on offer at the other destination suggests that there is a common market for both regions, which should be evaluated in greater depth in future studies.

With regards to the difficulty of doing nautical tourism given the particularities of the regions' waters, the Canaries are considered as a region with few difficulties by the majority of those interviewed at both destinations. Both yachtsmen and nautical tourists indicate that it is an ideal destination all year round. Morocco is considered by some of the respondents that visited the islands (33 %), as being

a region with a certain amount of difficulty for sailing because of the climate, and the patrolling and controls placed on the yachtsmen. In relation to the climate, the nautical tourists at Agadir stated that another difference between the Moroccan and Canarian waters was that the former are not able to be used all year round (at least not for certain sports), but that in the summer months the waters were ideal. However, yachtsmen stated that the conception of ideal meteorological conditions for sailing is different and that the Moroccan coasts posed certain difficulties in comparison to the Canary Islands, but that the climate was however favourable for sailing all year round.

These statements make us reconsider the theory behind the fact that nautical tourism attenuates the seasonal effect for the tourist economies, at least from a global point of view. In the case of the Canary Islands, the climate favours nautical tourism all year round but for Agadir the climate does have an influence and is key for doing recreational nautical sports.

Once discovered the fundamental difficulties of doing nautical tourism at the other destination, the nautical tourists were asked about their willingness to consume combined products (See Figure 3). More than 60 % of the interviewees in the Canary Islands said they would probably consume some type of joint product between the two regions. For yachtsmen, for example, combined regattas is a possibility and for the rest of nautical tourists different packages or competitions were also appealing. In the same way, 48 % of the nautical tourists at Agadir stated they would be willing to participate in joint initiatives. The willingness of the nautical tourists that visited Agadir was notably higher than those that visited the Canary Islands; therefore, the initiative may be more successful in the beginning if the focus is on the main international markets.

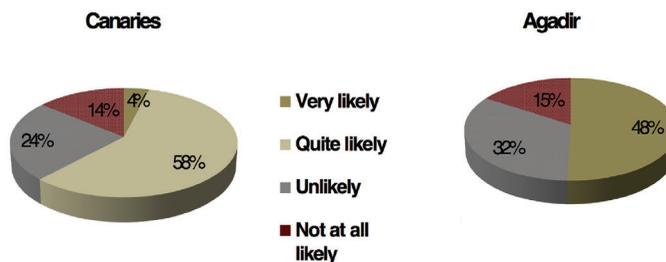


FIGURE 3. Willingness to participate in combined recreational nautical activities Canary Islands-Agadir. Source: prepared by the authors.

Given the evaluations presented above, we can assume that there are good market opportunities for the joint development of the sector. What is currently offered at both destinations should be improved without forgetting the importance of the quality and sustainability of the activity and the destinations themselves.

Conclusions

Correct market segmentation is key to an effective study of the demand of nautical tourism, as it is for any of the sub-segments of the tourism industry. In the research carried out, it has been seen that the behaviour and evaluation of nautical tourists varies based on the type of activity they will do at the destination, with clear profiles distinguishing a nautical tourist that sails from a nautical tourist that pursues recreational activities.

It can be concluded that nautical tourists and yachtsmen found that their expectations with the nautical and tourist services offered at the destinations were not fulfilled, suggesting an existing lack of quality at both destinations. Agadir, considered an emerging destination with poorer infrastructure, products and services on offer in comparison to the Canary Islands, is considered to have not very low evaluations. However, Moroccan tourist and nautical enterprises require qualification in order to meet the market expectations.

With respect to the use and satisfaction of the nautical offer, yachtsmen (regardless the destination they are at) after sailing tend to fish, charter a boat, diving or do kayaks and surf-windsurf; whereas the tourist motivated by nautical recreational sports tends to do many different activities (the most popular are charter, watercraft, surf-windsurf, skiing and diving). The satisfaction of yachtsmen was indeed less positive in comparison to nautical tourists, seemingly because they are less fulfilled with the basic services offered to their boats at ports, which influences their satisfaction as sailors.

As far as the use and satisfaction of the complementary tourist offer at the destination, it can be assumed that in general, nautical tourists that travel to do recreational nautical activities also use their time to enjoy a wide variety of other water sports and activities related to active tourism and nature; whereas yachtsmen tended to choose calmer activities. Shopping and eating out are the favourite activities of yachtsmen, whereas the rest of nautical tourists, besides the main reason for their holiday (water sports) prefer swimming and other sports related to active tourism, the sea and excursions. Likewise, whereas nautical tourists and yachtsmen were satisfied with these activities on their visit to the Canary Islands, in Agadir the products and services on offer require some improvement in order to increase the user's level of satisfaction. Nevertheless,

the majority of yachtsmen and nautical tourists that have visited the Canary Islands and Agadir during the studied period would recommend the destinations to family and friends, although the satisfaction with nautical products and services did not present the maximum values.

The potential offered by both destinations for the development of combined nautical packages is clear. It has been demonstrated that, from a market point of view, there is a mutual recognition of both regions as nautical destinations and there are similar preferences on activities to be carried out, which is directly related to the profile of nautical tourists visiting this part of the world. The yachtsmen's preference for organised crossings allows designing innovative products, such as crossing the Mediterranean to the Atlantic. The fact that there are difficulties in Moroccan waters could lead to the creation of professional circuits and competitions. Furthermore, the definition of both destinations for nautical tourism will also depend on the attention given to the port and its services.

With regards to the generation of new joint packages, the Canary Islands have a long history of development in the sector, particularly from small local companies, an experience that could be

used as a basis for developing the African market. We could confirm that, given the current preferences in the nautical tourism demand, not only a varied nautical package assures a greater market success, but also, the integration of other tourist, cultural, nature and sporting experiences seems to respond better to the multifunctional profile of the nautical tourist.

In order to meet the expectations of the current sailors that visit Canarian and Moroccan ports, businessman, after guaranteeing the qualification of the services to the boats, should also verify that their ports are able to offer or recommend some other nautical activities, such as sport fishing, diving, kayaks or surf-windsurf. Thus, the probability of increasing their satisfaction will be raised. Ports, more and more, should be conceived as a mean of integration between the sailors and the tourist, and as a cultural and commercial offer of the destination. At the same time, new joint strategies regarding products and services for tourists motivated by other nautical sports, should integrate the active tourism as a differentiation key element. A more qualified and integrated nautical and tourist offer at destinations is the key to meet the expectations and satisfaction of the actual nautical tourism demand.

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