

## EXECUTIVE SUMMARY

<b>TOMAS-NAUTICAL SURVEY 2004</b>	<ul style="list-style-type: none"> <li>• Survey on attitudes and expenditures of yachtsmen in Croatia in summer 2004</li> <li>• Pilot survey conducted in 2001</li> <li>• One of the surveys from TOMAS survey group, conducted by the Institute for Tourism from 1987</li> </ul>
<b>SURVEY METHODOLOGY</b>	
<b>Research goals:</b>	<ul style="list-style-type: none"> <li>• Basis for segmentation of nautical tourism demand</li> <li>• Identification of the main advantages and disadvantages of the Croatian nautical and overall tourism product</li> <li>• Data on yachtsmen expenditures</li> <li>• Comparison of tourism demand characteristics between yachtsmen and guests in accommodation facilities</li> </ul>
<b>Area frame:</b>	<ul style="list-style-type: none"> <li>• 26 marinas along the coast and on the islands (from Umag to Dubrovnik)</li> </ul>
<b>Time frame:</b>	<ul style="list-style-type: none"> <li>• June to September 2004</li> </ul>
<b>Survey instrument:</b>	<ul style="list-style-type: none"> <li>• Questionnaire in seven different languages</li> </ul>
<b>Method:</b>	<ul style="list-style-type: none"> <li>• Personal interviews and self-completion with the assistance of the interviewer</li> </ul>
<b>Sample size:</b>	<ul style="list-style-type: none"> <li>• 1800 respondents</li> </ul>
<b>Population:</b>	<ul style="list-style-type: none"> <li>• 11 countries of origin that realized around 92% of the total number of overnights in nautical ports in Croatia in 2004 (Croatia, Germany, Austria, Italy, Slovenia, Great Britain, Czech Republic, Hungary, France, Poland and Netherlands)</li> <li>• Individual and charter</li> </ul>
<b>Sample design:</b>	<ul style="list-style-type: none"> <li>• Stratified random sampling</li> <li>• Strata:                             <ul style="list-style-type: none"> <li>• Seasons</li> <li>• Country of origin</li> </ul> </li> <li>• Sample frame – tourist overnights realized in nautical ports in 2003</li> </ul>
	<ul style="list-style-type: none"> <li>• All survey results were corrected by 2004 data (June to September) on tourist overnights in nautical ports by the country of origin</li> </ul>
<b>MAIN RESEARCH RESULTS AND OBSERVED CHANGES IN COMPARISON TO TOMAS-SUMMER 2004 SURVEY</b>	
<b>Socio- demographic profile:</b>	<ul style="list-style-type: none"> <li>• Dominant share of yachtsmen between 30-49 years of age (60%), 30% are 50 year of age and older.</li> <li>• 44 years of age on average.</li> <li>• Almost three thirds of yachtsmen (74%) have two-year college or university degree.</li> <li>• Yachtsmen are the most loyal tourists - majority of foreign yachtsmen have been sailing in Croatia two or more times (74%); 42% have been sailing in Croatia six and more times.</li> <li>✓ <i>Yachtsmen are, on average, slightly older than tourists in accommodation facilities and a higher proportion of them completed higher education.</i></li> </ul>

<p><b>Sources of information and means of transportation:</b></p>	<ul style="list-style-type: none"> <li>• Previous visits is the most important source of information (47%), followed by recommendations of friends and relatives (28%), various media (19%) and Internet (19%).</li> <li>• Yachtsmen are arriving to the port of departure in Croatia mostly by car (63%), their vessel (20%) or plane (10%). Those who are renting a boat or sailing on bigger boats are coming by plane more frequently than other tourists.</li> <li>✓ <i>Yachtsmen rely less on various promotional media to get information about Croatia's tourism product than other tourists .</i></li> <li>✓ <i>Similar to other tourists, the share of those who used media and Internet as source of information is increasing; simultaneous use of different sources of information is noticeable.</i></li> <li>✓ <i>Although yachtsmen are mostly arriving to their port of departure by car, the proportion of those arriving by their vessel is growing.</i></li> </ul>
<p><b>Travel characteristics:</b></p>	<ul style="list-style-type: none"> <li>• Majority of the interviewed yachtsmen were on their own boats (52%), about a third (32%) were on charter and the rest (16%) were on boat owned by someone else.</li> <li>• Of those who were not on their own boat, 73% paid the rent. Of yachtsmen who rented a boat 65% paid the rent in Croatia and the rest paid it abroad.</li> <li>• Most yachtsmen who rented a boat made reservation through charter company (70%) or travel agency (16%).</li> <li>• 22% of yachtsmen were sailing with hired skipper or crew.</li> <li>• There were 4 persons on the boat on average, including hired skipper or crew (4 on the boats owned by yachtsmen and 5 on the boats in charter).</li> <li>• Yachtsmen were usually cruising the Croatian coastline from marina/port to marina/port (43%), about 10% was mooring outside the marinas and ports, 25% made daily trips from their port of origin and 22% had half overnights in marinas/ports and half moored outside</li> <li>• Yachtsmen realized 16 overnights on average during their journey; of those, 10 overnights on average in marinas, slightly less than 4 overnights on average on moorings outside marinas/ports and slightly less than 3 overnights on average in town ports.</li> <li>• Majority of yachtsmen organize their breakfast exclusively (51%) or predominantly (42%) on their boat, they have lunch mostly on board (21% exclusively and 51% predominantly) while dinner is usually organized in restaurants (48% predominantly and 20% exclusively).</li> <li>• Most frequent activities while staying in marinas or destinations are visits to restaurants (96%), visits to café-bars and cake shops (95%), shopping (88%), enjoying excursions (76%), visits to local parties (72%), walking in nature (70%) and sightseeing (67%).</li> <li>✓ <i>Number of overnights that yachtsmen are realizing on their journey is decreasing on average, similar to other tourists. The share of those staying 15 and more overnights is decreasing.</i></li> <li>✓ <i>Although yachtsmen are arriving to their port of departure by car, they use plane more often than other tourists.</i></li> </ul>

<p><b>Attitudes:</b></p>	<ul style="list-style-type: none"> <li>• Yachtsmen were, during summer 2004, very satisfied with beauty of the nature and scenery and personal safety and relatively satisfied with hospitality of marina personnel. With all other elements of marinas' products and services as well as destination tourism product (total of 21 elements) they were not satisfied.</li> <li>• The analysis of competitiveness of Croatian nautical tourism product in comparison to other Mediterranean destinations showed that the main advantages are clean sea, environmental preservation and natural beauty, while the main disadvantages are the image of Croatia, variety of gastronomic offer and equipment and supply in marinas.</li> <li>• Results are showing that Croatian nautical tourism product is highly competitive in comparison to Slovenia and Turkey, partly Greece, and less competitive in comparison to Spain, France and Italy.</li> <li>✓ <i>Similar to tourists who stay in accommodation facilities, yachtsmen were very satisfied with beauty of nature and scenery and dissatisfied with various tourism supply elements in destinations visited.</i></li> </ul>
<p><b>Expenditures:</b></p>	<ul style="list-style-type: none"> <li>• Average trip expenditures, including travel expenditures to departing port and back, boat expenditures and other expenditures while staying in marinas and destinations, per person, were 1281 Euro.</li> <li>• Average daily expenditures of yachtsmen were 72 Euro per person; daily expenditures of those on individually organized trips amounted to 55 Euro, while those who rented a boat spent, on average, about 139 Euro.</li> </ul>