Nautical Tourism within TSA Framework: Case of Croatia

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Content and Aim

- Croatia and Nautical Tourism
- Terminology
- TSA Framework and Nautical Tourism
- TSA and STS in Croatia
- Conclusions and Further Steps

Stemming from the process of TSA compilation for Croatia, we suggests and discusses the methodological approach to nautical tourism in TSA tables where its visibility is being lost.
Croatia: Attractiveness for nautical tourism

- Mediterranean country
- 6.3 thousand km coastline, 30% on mainland and 70% on islands
- 1246 islands (many of them inhabited), islets, rocks
- Pristine environment
- Great variety of landscape

- Mild climate (including winds)
- UNESCO sites (Dubrovnik, Split, Trogir, Šibenik, Poreč)
- 4 National and 2 Nature Parks
- Proximity/accessibility to major tourist generating markets
Croatia: Attractiveness for nautical tourism

- **58** marinas, 13 land marinas
- **> 17,000** moorings in marinas (+ 5,000 at land storage)
- 58 registered anchorage sites and 7 moorings, but also numerous (unknown number of) moorings in town/public ports along the coast/islands plus unlimited anchorage possibilities
- **> 5,000 vessels** in Croatian charter fleet
- **> 13,000** permanently moored vessels
- **200,000** vessels in transit
- **> 3 million** overnights in charter only
- **160 Euro** per person/night in charter (2012.)
- **70 Euro** per person/night on own vessel (2012.)
- Majority are foreign tourists
Croatia: Attractiveness for nautical tourism

- One of ‘must see’ attractions/ ‘life time’ tours by National Geographic
- > 200 cruise vessels/ships cruising within Croatian sea waters (small ship / ‘domestic’ cruising)
- 30 beds per ship on average

- 40% average expected utilization rate
- 120 Euro per person per night (2017.)
- > 100 million Euro total consumption (2017.)
- Mostly foreign tourists
Terminology

- Lack of internationally adopted terms and definitions generates confusion
- Terms in use (synonyms?): nautical tourism, marine tourism, sailing tourism, yachting tourism, cruise tourism (international, small ship / domestic)
- Use of boat as a means for a boating/sailing experience not as a means of transportation
- Wide range of definitions, even in Croatia:
  - all types of water related activities
  - sailing and staying of tourists on boats
  - including unregistered boats and commercial passenger ships

**Working definition:**

**Nautical tourism is a tourism product comprising different activities and products/services related to the boating experience as the main focus of interest/travel motive of tourists on personally owned or chartered vessels (yachting tourism) and on cruisers (cruising)**
TSA framework and nautical tourism

- TSA compilation still greatly differs between countries (Eurostat, 2009, 2013)
- TSA:RMF 2008 has brought clarification of concepts of tourism expenditure and tourism consumption and has introduced solutions for dealing with some special issues

But

- Despite growing interest, there are no international recommendations regarding statistics for tourism products because these are not ‘sufficiently characterized in a uniform way’ [IRTS 2008]
- TSA:RMF 2001/2008 does not provide an analytical framework for measuring relevant economic characteristics of tourism according to:
  - main purpose of a tourism trip, nor
  - types of tourism products.
TSA framework and nautical tourism

- Nautical tourism is an example of a tourism product with a specific expenditure structure.

- Elements of nautical tourism are recognized in both activity/product classifications and in main tourism statistics methodological manuals:
  - Activity/product classifications regulate all major aspects of different types of nautical tourism products.
  - Tourism statistics manuals:
    - Focus mostly on non-monetary indicators (number of tourist arrivals and overnights by mode of transport).
    - Provide no recommendations for measurement of those indicators especially from the point of: (i) yachtsmen using non-commercial moorings or those on anchor outside the marinas/ports, and (ii) use of permanent moorings, both by locals and tourist.
TSA framework and nautical tourism

Structure (in %) of inbound average tourist expenditures* for Croatia in 2011

<table>
<thead>
<tr>
<th></th>
<th>Tourist in paid accommodation facilities</th>
<th>Nautical tourists</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Yachting tourist</td>
<td>Own/friends and relatives vessels</td>
<td>Charter</td>
</tr>
<tr>
<td>A. Consumption products</td>
<td>100,0</td>
<td>100,0</td>
<td>100,0</td>
<td>100,0</td>
</tr>
<tr>
<td>1. Paid accommodation services for visitors</td>
<td>49,3</td>
<td>0,9</td>
<td>0,5</td>
<td>0,0</td>
</tr>
<tr>
<td>2. Food- and beverage-serving services</td>
<td>24,7</td>
<td>25,4</td>
<td>12,6</td>
<td>28,5</td>
</tr>
<tr>
<td>3. Passenger transport services</td>
<td></td>
<td></td>
<td></td>
<td>39,8</td>
</tr>
<tr>
<td>4. Transport equipment rental services</td>
<td></td>
<td></td>
<td></td>
<td>58,1</td>
</tr>
<tr>
<td>5. Cultural, sports and recreational services</td>
<td>8,2</td>
<td>19,7</td>
<td>9,5</td>
<td>4,0</td>
</tr>
<tr>
<td>A.2 Other consumption products</td>
<td>17,8</td>
<td>54,1</td>
<td>19,3</td>
<td>27,6</td>
</tr>
</tbody>
</table>

* without expenditures for transport cost to and from destination

The structure of tourist expenditure significantly differs between nautical tourists and tourists using paid accommodation facilities

special attention from tourism policy makers is needed
TSA and STS in Croatia

Experience
- Feasibility study, experimental TSA for 2005 & 2007, TSA for 2011
- Weaknesses: availability of structural statistics, assessment of hidden economy, assessment of nautical tourism

Data
- STS assessed as mostly satisfactory (available data from periodical surveys of domestic and inbound visitor activity/expenditures)
- Specific/ad hoc surveys

Nautical Tourism
- Limitations: (i) availability of data on expenditures; (ii) NA two level ISIC data
- Solutions: (i) conducting surveys of different segments of nautical demand, (ii) placing nautical tourism in the standard TSA framework as it was not possible to extract nautical tourism specific activity
**TOMAS Nautica Yachting Survey**

Longitudinal survey on Attitudes and Expenditures of Yachting Tourist in Croatia conducted by the Institute for Tourism

|            | June - September |
| Sample     | > 2,000 respondents/yachtemen (charter and own vessel) |
|            | 20 to 25 marinas, 8 to 10 town ports |
|            | Stratified sample (vessel ownership, month, country of origin) |
| Instrument | Questionnaire |
| Dana collection | Personal interview (CAPI) |
| Scope/content | Profile, sources of information, means of transport, number of overnights (marinas, town ports, on anchorage), hired skipper, activities, satisfaction and expenditures |
Conclusions and Further Steps

- TSA framework is not focused on tourism products as ‘specific packages’ comprising different activities and products/services related to specific interest/motives
- TSA international comparability depends on tourism products mix of tourism destinations/countries
- Nautical tourism is a tourism product which can have a significant impact on TSA results as it is characterized by specific structure of tourism consumption product/service expenditures, significantly different from majority of other tourism products
- **Enhancing tourism statistics coherence and comparability as well as accuracy and reliability in regard to definition of nautical tourism, especially considering:**
  - treatment of boat/yacht as ‘second home’ and/or accommodation facility in case of multi-day (domestic) cruising
  - interpretation of usual environment for those having boat/berth in place of residence
  - treatment of cost of permanent berth and yearly/regular service and treatment of cost for skipper hired separately from the boat etc.
  - international harmonization of measurement of inbound nautical tourist arriving by boat and not using berths or commercial moorings in nautical ports.
- **Increasing – internationally harmonized – visibility of nautical (or any other relevant) tourism product by:**
  - compilation of a specific satellite account for nautical tourism, and/or
  - extraction of specific (recommended) nautical tourism product/services into the country specific nautical tourism products/activities, and/or
  - extension of ten TSA tables by complementary set of tables describing monetary and non-monetary volume of nautical tourism product.
THANK YOU FOR YOUR ATTENTION

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