

EXECUTIVE SUMMARY

TOMAS-NAUTICAL SURVEY 2007	<ul style="list-style-type: none"> • Survey on attitudes and expenditures of yachtsmen in Croatia in summer 2007 • Conducted also in 2001 and 2004 • One of the surveys from TOMAS survey group, conducted by the Institute for Tourism since 1987
TOMAS-NAUTICAL SURVEY 2007 SURVEY METHODOLOGY	
Research goals	<ul style="list-style-type: none"> • Basis for segmenting the nautical tourist market • Identification of the main advantages and disadvantages of the Croatian nautical and overall tourism product used by yachtsmen • Data on yachtsmen expenditures • Continuous tracking of the nautical tourism demand trends • Comparison of tourism demand characteristics between yachtsmen and guests in accommodation facilities (TOMAS Nautical Survey 2007 and TOMAS Summer Survey 2007)
Area frame	<ul style="list-style-type: none"> • 28 marinas along the coast and on the islands (from Umag to Dubrovnik)
Time frame	<ul style="list-style-type: none"> • June to September 2007
Survey instrument	<ul style="list-style-type: none"> • Questionnaire available in eight languages
Method	<ul style="list-style-type: none"> • Personal interview
Sample size	<ul style="list-style-type: none"> • 2144 respondents
Population	<ul style="list-style-type: none"> • 12 countries of origin that realized around 91% of the total number of overnights in nautical ports in Croatia in 2007 (Croatia, Italy, Germany, Austria, Slovenia, Hungary, Great Britain, Czech Republic, France, Poland, Slovakia and Netherlands) • Individual (no renting costs) and charter (renting costs)
Sample design	<ul style="list-style-type: none"> • Stratified random sampling • Strata: <ul style="list-style-type: none"> • Seasons • Country of origin • Sample frame - tourist overnights realized in nautical ports in 2006
Sample weighting	<ul style="list-style-type: none"> • All survey results were weighted by 2007 data (June to September) on tourist overnights in nautical ports by the country of origin
Presentation of results	<ul style="list-style-type: none"> • All survey results are presented by the country of origin, length of vessel and separately for yachtsmen on individual and charter

**MAIN RESEARCH RESULTS AND
OBSERVED CHANGES COMPARED TO THE 2004 SURVEY RESULTS**

<p>Socio-demographic profile</p>	<ul style="list-style-type: none"> • Yachtsmen between 30-49 years of age dominate (57%), followed by those over 50 years of age (32%) and those younger than 30 years of age (11%) • The average age of yachtsmen is 44 • The majority of yachtsmen are well educated - 80% have a two-year college or university degree ✓ The average age of yachtsmen did not change significantly in comparison to 2004 survey results ✓ Yachtsmen are more educated than in 2004 (42% of yachtsmen with university degree in 2004 as opposed to 50% in 2007)
<p>Previous visits and sources of information</p>	<ul style="list-style-type: none"> • Yachtsmen are the most loyal tourists - majority of foreign yachtsmen have been sailing in Croatia two or more times (80%); 49% have been sailing in Croatia six and more times; for 9% sailing in summer 2007 has been first visit to Croatia • Previous visits is the most important source of information (44%), followed by recommendations of friends and relatives (25%), Internet (25%) and various media (24%) ✓ The share of loyal tourists-yachtsmen has increased, while the share of those who visited Croatia for the first time decreased (from 11% in 2004 to 9% in 2007) ✓ The share of those who used media and Internet as source of information has increased (the use of Internet increased from 19% to 25% in 2007; the use of media increased from 19 to 24% in 2007)
<p>Means of transportation</p>	<ul style="list-style-type: none"> • Yachtsmen are arriving to the port of departure in Croatia mostly by car (59%), their vessel (23%) or plane (14%); those who are renting a boat are coming by plane more frequently than other tourists • Within the plane arrivals the scheduled flights are more frequent (10%) than the charter ones (4%); among tourists that arrived by scheduled flights 40% were flying by low-cost airlines ✓ Increase of air transport (from 10% in 2004 to 14% in 2007) and vessel (from 20% in 2004 to 23% in 2007) in tourist arrivals
<p>Travel characteristics</p>	<ul style="list-style-type: none"> • Majority of the interviewed yachtsmen were on their own boats (48%), about 38% were on charter and the rest (14%) were on boat owned by someone else • Of those who were not on their own boat, 78% paid the rent; of yachtsmen who rented a boat 60% paid the rent in Croatia and the rest paid it abroad • Most yachtsmen who rented a boat made reservation through charter company (72%) or travel agency (19%) • 22% of yachtsmen were sailing with hired skipper or crew • There were 5 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)

<p>Travel characteristics</p>	<ul style="list-style-type: none"> • Yachtsmen realized 14 overnights on average during their journey; of those, 9 overnights on average in marinas, 2 overnights on average in town ports and 1 to 2 overnights on average on corpo-morto or moorings outside marinas/ports • Majority of yachtsmen organize their breakfast exclusively (61%) or predominantly (32%) on their boat, they have lunch mostly on board (25% exclusively and 48% predominantly) while dinner is usually organized in restaurants (52% predominantly and 16% exclusively) • Most frequent activities while staying in marinas or destinations are visits to café-bars and cake shops (98%), restaurants (97%), shopping (94%), enjoying excursions (84%), walking in nature (80%), sightseeing (79%) and visits to local parties (78%) ✓ The average duration of sailing has decreased, from 16 overnights in 2004 to 14 overnights in 2007 ✓ Participation in various activities, both in terms of range and frequency, has slightly increased compared to the 2004 survey results
<p>Attitudes</p>	<ul style="list-style-type: none"> • Yachtsmen were, during summer 2007, the most satisfied with beauty of the nature and scenery and personal safety; they were also satisfied with transfer at marinas, hospitality of marina's personnel, gastronomic offer in destinations and the accessibility of the departure port; the yachtsmen were not entirely satisfied with the majority of marina supply elements; yachtsmen were unsatisfied with four elements: variety of cultural manifestations, sport activities and entertainment in destinations as well as with shopping facilities in the marina • The analysis of competitiveness of Croatian nautical tourism product in comparison to other Mediterranean destinations showed that the main advantages are the clean sea, environmental preservation, natural beauty, safety, friendliness of hosts and the geographical spread of marinas • The main disadvantages are the image of Croatia, the variety of gastronomic offer and equipment and supply in marinas; the similar quality was expressed for gastronomic offer and 'value for money' of entire nautical tourism product ✓ On average, yachtsmen' satisfaction with nautical tourism product increased in comparison to the 2004 survey
<p>Expenditures</p>	<ul style="list-style-type: none"> • The average trip expenditures per person, including travel expenditures to departing port and back, vessel expenditures and other expenditures while staying in marinas and destinations, is estimated on 1591 Euro; the average trip expenditures of those on individually organized trips amounted to 1482 Euro, while those who rented a boat spent, on average, about 1789 Euro per trip per person • Average daily expenditures of yachtsmen is 100 Euro per person; daily expenditures of those on individually organized trips amounted to 78 Euro, while those who rented a boat spent, on average, about 171 Euro ✓ Average trip expenditure per person in summer 2007 is about 24% higher than those realized in 2004 ✓ Average daily expenditure in summer 2007 is about 39% higher than those realized in 2004