

EXPLORING PREFERENCES AND PERCEPTIONS OF THE EUROPEAN YACHTSMEN VISITING THE CANARY ISLANDS (SPAIN)

Yen Elízabeth Lam-González

Carmelo Javier León

Javier de León Ledesma

Instituto Universitario de Turismo y Desarrollo Económico Sostenible - Tides
Universidad de las Palmas de Gran Canaria
tides@ulpgc.es

The nautical sector has great potential for the socio-economic development of tourism because of the multiplier effect it generates on the economy. The creation of stable and qualified employment, the complementarity with the tourism services, the mitigating effect of the seasonal nature of tourism, the impulse it gives to the qualification and diversification of coastline infrastructures, and technological innovations, (Landaluce, 2012; Ferradás Carrasco, 2001), are some of the reasons that confirm the above statement. In addition, the level of attraction the nautical sector has for a segment with a high socio-economic level and purchasing power is clear. This in turn indicates the high profitability potential that the sector offers (Luković, 2013; Rivera Mateos, 2010 a.; Ferradás Carrasco, 2002).

Nautical tourism has been defined as a strategic sector with great importance for the development of tourism in Spain (Gómez, 2012), and there is a clear understanding by governments, universities, companies and other participants of the need to take advantage of the potential that said sector offers (Vadell, 2005; Ferradás Carrasco, 2002). The sector is a key priority especially for the Canary Islands. The qualities that the Spanish archipelago has as a nautical destination are multiple, such as its strategic position for crossing the Atlantic, the natural conditions it has, the climate, the beauty of its coastlines and its position as a top tourist destination at a European level. These aspects, together with the prior experience and tradition the islands have as a stop over port in the Atlantic when crossing Europe towards America, represent strengths that have not yet been taken advantage of in the archipelago's attempt to move away from its image as a traditional sun and beach destination. Such is the case that the Governmental Authorities in the Canary Islands are committed to specialising the destination in nautical tourism and have clear strategies in place to manage this.

There is a clear conviction that it is possible to position the islands as a nautical destination of excellence on a European level. In this strategy yachting tourism, ports and marinas play a key role. The fundamental reasons for considering recreational sailing to be a strategic pillar in the renovation of the tourism industry in the Canary Islands are determined by a series of premises. Ports and marinas are considered to be the most important capital base for nautical tourism (Luković, 2012; Besteiro, 2004). It is a sector with a high level of consumption of services, with a strong proportion of intermediate consumption, connected to other important productive sectors (Landaluce, 2012), and with a high direct and indirect multiplier effect on employment at the destinations (Pérez-Labajos, Blanco, Sánchez, Madariaga, Díaz, Torre, López and Sanfilippo, 2014; Landaluce, 2012; Cabrera, 2011). Recreational sailing is also known as one of the most elitist tourist activities and one with great economic potential for the future (Luković, 2013), this is largely because of its high level of connection to factors of a structural character (De Sousa, Fernandes and Carpinteiro, 2009).

However, renewing the nautical tourism sector is believed to be a difficult process because of the large number of participants and factors that interact within the same (Rebollo and Castiñeira, 2010). In this context, the study of the demand and nautical consumer behaviour, which poses a large gap in literature on nautical tourism, (Luković, 2013), takes on a fundamental role given that it allows to support strategies at the destination according to the current needs or preferences of the market (Ferradás Carrasco, 2002).

This research proposes therefore, to undertake a contrasted analysis of the current and future travel preferences and motivations of the European yachtsmen that visit the Canary Islands, as well as their perceptions regarding the ports, the nautical services on offer and the destination itself. In addition, the study further analyses the role that prior familiarity with the port (repeating tourists) and the experience the yachtsmen have, has on the series of evaluations and perceptions these tourists have; their level of satisfaction and perceived image. Finally, the results provide the opportunity to identify weaknesses in the nautical and tourist offer at the destination, as well as provide a series of recommendations regarding the design of products, business models, tourism management and promotional strategies. The paper, therefore, is structured as follows:

In the second section of the paper a review of literature on nautical tourism was carried out, highlighting the main gaps and contrasts to be found on this topic. There is currently no consensus on the definition of nautical tourism (Luković, 2013), or on the characteristics that define the diverse modalities that it comprises (Gómez, 2012; Luković, 2007; Pélaez, 2002; Ferradás Carrasco, 2001). Furthermore, even though the literature on tourism is vast as far as the study of consumer behaviour is concerned, in nautical tourism, there are still only a limited number of publications. Some authors such as Jugović, Kovačić and Hadžić (2011), Pereira, Mascarenhas, Flores and Pires (2014), De Sousa, Fernandes and Carpinteiro (2009), Ferradás Carrasco (2002) and Chapapriá (2000), affirm that the correct combination of nautical and tourism activities at the destination, the service quality, environmental management of the ports and the level of security all have a relevant role in the development of the sector, because they have already shown to have successful trends in some destinations. Similarly, other authors such as Suárez, Zoghbi and Aguiar (2013), Horak (2013), Jovanovic, Dragin, Armenski, Pavic, and Davidovic

(2013) and Znidar (2010) have more recently advanced in studying the choice process, motivations and level of satisfaction. However, it should be highlighted that the advances perceived and the quantitative techniques in tourism have not been extensively applied to the study of nautical tourism.

In the third section there is a brief description of the nautical sector in the Canary Islands outlining its recent evolution and future perspectives. The main statistics of the recreational sailing industry in the Canary Islands, as well as the main challenges and limitations the sector represents according to earlier studies are also covered. As far as demand is concerned, the characteristics and size of the target market for the study are addressed, that is, European yachtsmen on route to the Canary Islands. The process of sample construction, the research tools as well as the data processing is outlined in section four. The fieldwork was carried out during two different periods in the year, November and December of 2013 and May to June of 2014 at the main recreational ports of call in the Canary Islands. As well as the structured questionnaire with open and closed questions, interviews were held which enriched the database with qualitative elements, and which allowed a loyal sample to be chosen at the beginning of the study. The main limitation to the fieldwork and the construction of the sample was the large number of ports users that were residents in the Canary Islands (excluded from the study).

At this point, from a methodological view, the paper considers 4 research questions; Q1.- The organisation and planning of the trip to the Canary Islands differs between the European yachtsmen according to their nationality; Q2.- The satisfaction the European yachtsmen feel towards the ports and marinas differs based on whether they are repeating tourists or not; Q3.- The evaluation of the destination attributes varies among the European yachtsmen based on their sailing experience; Q4.- The travel preferences vary among the European yachtsmen according to their nationality.

Section five shows the results of the empirical analysis, which was structured in 3 different points of interest:

Firstly, it has been confirmed that the level of satisfaction the European yachtsmen currently feel with regards the recreational ports and marinas in the Canary Islands is not optimum. From a consumer point of view, the main weaknesses these installations have lie in environmental management and the basic and complementary services offered. The need to improve these services, increase the global satisfaction and satisfy the expectations of the end user is clear. These aspects should form a key part of the loyalty strategies aimed at clients in this sector. In a more competitive international context of the sector, the current levels of satisfaction that the market indicates, could favour future behaviour of the clients diametrically opposed to that desired.

Secondly, the perceived image of the nautical tourism services on offer at the destination doesn't show optimum values. The same occurs with the global perceived image of the destination. From a cognitive point of view, both experienced and first time tourists consider that the environmental management, security and conditions of the nautical sports companies (particularly sports like water skiing/ chartering/surfing/windsurfing), need improving. Increasing the quality and the capacities of the local nautical tourism companies should form part of the specialisation strategy intended for the destination. Verifying that neither the loyalty of the tourist to the destination nor the experience of the yachtsmen

determine differences regarding the satisfaction with the port or the perceived image of the destination respectively, offers certain advantages for the study's recommendations. Even though the Canary Islands have a long history and wide experience in the development of the nautical tourism sector, there is still a lot of work to be done. The future specialisation strategy for the destination should firstly look at revamping the current products and services on offer, and secondly at carrying out a correct segmentation of the demand and at taking into account the preferences and profiles of the respective current and potential clients this market has.

Finally, this study identifies essential aspects that demonstrate the differences in the profile of European yachtsmen that stop off at the Canary Islands. The reason for the trip, how it has been organised, and the type of water sports that are usually combined with sailing are the main factors that differentiate one yachtsman from another of a different nationality. All these elements play an important role when proposing business models for nautical tourism, and they provide the opportunity to innovate in the design of products and tourist packages that will have greater market success. It is important to understand the preferences of this market regarding their participation in regattas and competitions and the high proportion of yachtsmen that prefer leisure sailing, or an organised crossing based on experiences, as this offers insight into the type of products or services that will offer better opportunities for the destination.

In summary, the current research contributes to the state of art of the sector, given that it allows further analysis of the knowledge of the nautical consumer's behaviour, particularly for those ports and marinas users. This is an area, which is currently lacking in academic literature. The research provides up-to-date and useful information if reflected in the current promotional and specialisation strategies being developed could generate a better and more sustainable growth of the sector.