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## **Nautical Tourism within TSA Framework: Case of Croatia**

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## Content and Aim

- Terminology
- Nautical tourism in Croatia
- TSA framework and nautical tourism
- Case of Croatia
- Conclusions

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

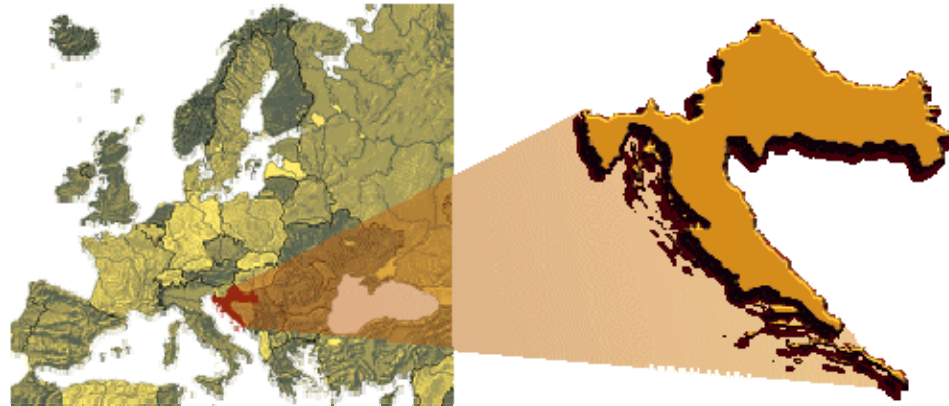
# Terminology

- Lack of internationally adopted terms and definitions generates confusion
- Terms in use (synonyms?): nautical tourism, marine tourism, sailing tourism, yachting tourism
- Use of boat as a means for a boating/sailing experience not as a means of transportation
- Croatia - wide range of definitions:
  - 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)**

# Nautical tourism in Croatia



## ATTRACTIVENES OF CROATIA FOR NAUTICAL TOURISM

- Mediterranean country
- 6.3 thousand km coastline, 30% on mainland and 70% on islands
- 1246 islands, islets, rocks
- Pristine environment
- Great variety of landscape
- Proximity/accessibility to major tourist generating markets



# Yachting tourism in Croatia

- **2013:**
  - 106 nautical ports on the Croatian coast, of which 67 marinas (including 14 land marinas) with 16,940 moorings in 2013 (CBS, 2014a)
  - 13.7 thousand permanently moored vessels
  - 182.9 thousands vessels in transit
  - Vessels moored in numerous town/public ports along the coast/islands are not statistically registered
- **Longitudinal survey on Attitudes and Expenditures of Yachting Tourist in Croatia in 2012 (Institute for Tourism, 2013a) shows that:**
  - yachtsmen realize 12 overnights during their journey
  - average expenditure (excluding travel expenditures to/from departing port) is 100 Euro per yachtsmen/day
  - about half of yachtsmen were in charter (vessels hired in Croatia) while others were on their own or vessels owned by friends and relatives

# TSA framework and nautical tourism

- **TSA compilation still greatly differs between countries (Eurostat, 2009, 2013)**
- **TSA potential benefits are numerous (Frangialli, 2006) such as:**
  - policy formulation
  - promotion of cooperation between stakeholders and marketing
  - improvement of environmental accounting and tourism statistics
- **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 framework and nautical tourism

- **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.
- **The fact that the tourism industry is heavily under pressure to apply market segmentation and diversification practices rises the question of extent to which TSA can be used for policy formulation and marketing**
- **Additionally, international comparison of TSA results (i.e. structure of expenditure) is questionable when there are significant differences in tourism product mix and especially when tourism products differ in expenditure patterns**



# 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 productsbut
  - 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

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

\* 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



# Case of Croatia

## Experience

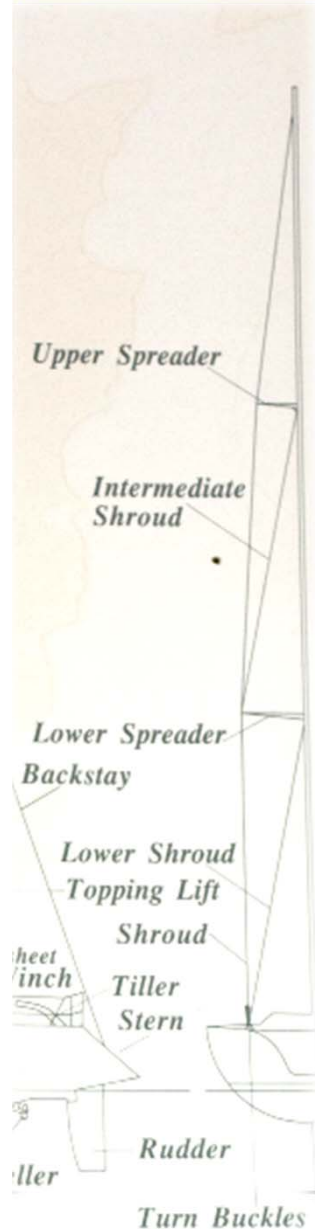
- Ten years experience:
- Feasibility study, experimental TSA for 2005 & 2007, TSA for 2011
- Weaknesses: availability of structural statistics, assessment of hidden economy, assessment of nautical tourism

## 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 of a few surveys of different segments of nautical tourist, (ii) placing nautical tourism in the standard TSA framework as it was not possible to extract nautical tourism specific activity



# Case of Croatia

## Inbound tourism expenditure\* for Croatia in 2011

	Tourists in paid and non-paid accommodation facilities		Tourists in nautical tourism		Total tourists	
	billion Euro	%	billion Euro	%	billion Euro	%
<b>A. Consumption products</b>	5,046.0	100.0	684.1	100.0	5,730.2	100.0
<b>1. Paid accommodation services for visitors</b>	1,787.5	35.4	0.0	0.0	1,787.5	31.2
<b>2. Food- and beverage-serving services</b>	1,338.0	26.5	130.9	19.1	1,468.9	25.6
<b>3. Passenger transport services</b>		0.0	11.3	1.7	11.3	0.2
<b>4. Transport equipment rental services</b>		0.0	190.6	27.9	190.6	3.3
<b>5. Cultural, sports and recreational services</b>	209.2	4.1	73.4	10.7	282.7	4.9
<b>A.2 Other consumption products</b>	1,711.3	33.9	278.0	40.6	1,989.2	34.7

\* without expenditures for transport cost to and from destination

- Nautical tourism generates 11.9% of total inbound tourism expenditure in Croatia
- Nautical tourism has a significant impact on structure of inbound expenditure: decreased share of paid accommodation, increased share of cultural, sports and recreational services and transport equipment rental
- Lost opportunity for analysis of direct contribution of nautical tourism to Croatian tourism

# Conclusions

- **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**



# Conclusions – Further steps

- **Enhancing tourism statistics coherence and comparability as well as accuracy and reliability in regard to definitions 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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