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The Canary Islands And Morocco As Destinations For Nautical Tourism. A Comparative Approach Through Tourist Perceptions

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THE CANARY ISLANDS AND MOROCCO AS DESTINATIONS FOR NAUTICAL TOURISM. A COMPARATIVE APPROACH THROUGH TOURIST PERCEPTIONS

LAS ISLAS CANARIAS Y MARRUECOS COMO DESTINOS NÁUTICOS: UN ENFOQUE COMPARATIVO A TRAVÉS DE LAS PERCEPCIONES DE LOS TURISTAS

AS ILHAS CANÁRIAS E MARROCOS COMO DESTINOS PARA TURISMO NÁUTICO. FOCO COMPARATIVO ATRAVÉS DAS PERCEPÇÕES DO TURISTA

LES ÎLES CANARIES ET LE MAROC COMME DESTINATIONS POUR LE TOURISME NAUTIQUE. UN POINT DE VUE COMPARATIF À TRAVERS DES PERCEPTIONS DU TOURISTE

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ABSTRACT

Nautical tourism is considered to be an underexploited research area, taking into account its empirical evolution and growth prospects. Despite the existing progress in the scientific production in tourism, the studies covering perceptions and attitudes of nautical tourism demand are limited. The present research was conducted to nautical tourists in a segmented way during their visit to the

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Canary Islands and Morocco between 2013 and 2014. Findings indicate that although the intentions of the nautical tourists to repurchase and recommend both destinations are high, their expectations respect to the nautical and leisure activities on offer at the destinations have not been fulfilled. The study provides the opportunity to identify destinations´ weaknesses from the market point of view. Finally, the contrasted analysis shows the existence of similar profiles between the nautical tourists visiting both regions, and the market potential for developing transnational and joint nautical tourism products and services, which is, in fact, a priority for the Public Administrations in both regions.

KEYWORDS:
nautical tourism, nautical destination.
JEL CLASSIFICATION:
L83, M20.

RESUMEN

El turismo náutico se considera un área de investigación poco abordada si se compara con la evolución empírica y las perspectivas de crecimiento que se le otorgan al sector. A pesar de los avances en la producción científica del cocimiento en turismo, los estudios referentes a la demanda de turismo náutico, sus percepciones y actitudes, aún se consideran escasos. El presente artículo aborda un análisis segmentado de las percepciones de los turistas náuticos durante su visita a las Islas Canarias y Marruecos entre los años 2013 y 2014. Los resultados muestran que, aunque las intenciones futuras de estos turistas náuticos de volver a visitar y recomendar los destinos son positivas, sus expectativas con respecto a la oferta de actividades náutico-turísticas del destino no han sido cumplidas. Así mismo, el estudio empírico permite identificar las principales debilidades de los destinos, desde la perspectiva de su demanda actual. Finalmente, el artículo demuestra que existen claras similitudes en el perfil de los turistas náuticos que visitan ambas regiones, y que existe un potencial de mercado para la generación conjunta de productos y servicios transnacionales en turismo náutico, lo que constituye una prioridad para el sector público de ambas regiones.

Palabras clave: destino náutico, turismo náutico.
Clasificación: JEL: L83, M20.

RESUMO

O turismo náutico é uma área de investigação pouco abordada se é comparada com a evolução empírica e as perspectivas de crescimento que é dado àquele setor. Apesar dos avanços na produção científica do cocimiento em turismo, os estudos sobre a demanda de turismo náutico, as suas percepções e atitudes, ainda é considerado escassas. Este artigo apresenta uma análise segmentada de turistas náuticos durante sua visita para as Ilhas Canárias e Marrocos entre os anos 2013 e 2014. De acordo com os resultados obtidos, embora estes turistas náuticos têm intenção de visita novamente e de recomendar os destinos, não foram completadas seus expectativas sobre a oferta de atividades náuticas e

turísticas do destino. O estudo empírico também permite identificar as fraquezas principais dos destinos, da perspectiva de sua demanda atual.
Finalmente, o artigo demonstra que existem semelhanças claras no perfil dos turistas náuticos que visitam ambas regiões, e que há um potencial de mercado para a geração combinada de produtos e serviços transnacionais em turismo náutico, o que constitui uma prioridade para o setor público de ambas regiões.

Palavras chave: destino náutico, turismo náutico.
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RÉSUMÉ

Le tourisme nautique est une domaine d'investigation peu abordée s'il est comparé à l'évolution empirique et aux perspectives de croissance qui lui sont données à ce secteur. Malgré les avances dans la production scientifique en tourisme, les études concernant la demande du tourisme nautique se considèrent peu abondantes. Cet article présente une analyse segmentée des perceptions et attitudes des touristes nautiques pendant leur visite aux îles Canaries et au Maroc entre les années 2013 et 2014. Selon les résultats obtenus, bien que ces touristes nautiques aient des intentions positives de revisiter et recommander les destins, ses expectatives au sujet de l'offre d'activités nautiques et touristiques du destin ne se sont pas accomplies. L'étude empirique permet d'identifier les faiblesses principales des destins, depuis la perspective de son actuelle demande. Finalement, l'article démontre qu'existent de claires similitudes dans le profil des touristes nautiques qui visitent les deux régions, et qu'il y a un grand potentiel de marché pour la génération conjointe de produits et de services transnationaux dans le tourisme nautique, ce qui constitue une priorité pour le secteur public des deux régions.

Mots clés: destin nautique, tourisme nautique.
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INTRODUCTION

Nautical activities have great potential for the socio-economic development of tourism because of the multiplying effect they generate for the economy. The generation of stable and qualified employment, easy fit with other tourism packages, lack of seasonality, the impetus that they provide to the qualification and diversification of the coastal infrastructures and the technological innovation are only some of the attributes that reinforce this statement (Ferradás Carrasco, 2001). It is also easy to observe the high capacity the nautical activities have to adapt to the new trends in tourism demand, as well as their high level of attractiveness to a market segment with a high socio-economic level and purchasing power. This, in turn, reinforces their high profitability potential (Rivera Mateos, 2010 a).

Nautical tourism, still considered an understudied field in Spain, has been defined as a strategic sector with a significant role in the development of tourism (Gómez, 2012). There is wide recognition among governments, universities, entrepreneurs and other agents for the need to specialise the nautical sector in the country (Ferradás Carrasco, 2002; Vadell, 2005).

The qualities that the Canary Islands possess as a nautical destination are widespread. Their strategic position in the middle of the Atlantic, the natural conditions of the islands, the climate, the beauty of their coastal landscapes and their positioning at a European level as a top quality tourism destination are all key elements. The fact that some of the most important nautical events in the world, such as the Atlantic Rally for Cruisers (ARC), which is the longest transoceanic regatta in the world, take place here emphasizes the catalysing capacity this segment possesses for the tourist sector in the archipelago. The potential of the nautical sector, the qualities of the archipelago and the need to reinvent their offer as a mature destination turn nautical tourism into an opportunity for the sustainability of the Canary Islands as a tourist destination (Parreno, 2008). Such is the conviction that the Canary Islands can be positioned as a nautical destination of excellence that the local Public Administration has made a commitment to specialise with public strategies already in place to motivate the planning, the diversification of the supply and demand, the competitiveness of the destination and the international promotion of the same.

Morocco on the other hand, despite the excellent natural conditions it possesses (coastline with high capacity to adapt to different uses, good climate and its strategic position in the pathway from the Mediterranean to the Atlantic), is still considered to be an emerging nautical destination. This is mainly due to the fact that the nautical sector was for a long time considered to be an activity reserved for a wealthy social class. In recent years there has been an effort to revalue the sector and, essential for this to be so, there is also a political desire behind this, which has provided new dynamics, particularly in construction and modernisation of installations (ports and marinas), the import and sales of recreational vessels, promotion for the starting up of nautical companies and the concern for professional training and communication, as it is considered to be a sector with wide economic opportunities for the country.

For Spain and particularly for the Canary Islands, Africa is an attractive market considering the geographical proximity and the political understanding of recent years. At the same time, the Public Administrations of both regions are keen to undertake the desired transformation of the nautical sector on a mutual basis. It is believed that joint nautical tourism packages widen the spectre of market opportunities for the Canary Islands and represents a significant catalyst for the positioning of Morocco in the sector. In addition, the fact that the commercial relations and cooperation between the Canary Islands and Morocco are growing, provides a solid base for future economic strategies to develop on. Morocco is publicly known as one of the priority objectives of the Spanish international trade policies, ahead of the other Maghreb States and ahead of the countries situated in geographical areas considered as priority.

However, renewing the nautical tourism sector is denoted as being a very complex process, mainly because of the large number of agents and factors that take part (Rebollo and Castiñeira, 2010). In this case, the complexity is of course duplicated because of the regional scope. To achieve the objectives, it is not sufficient to have political disposition and economic promotion in place, as the creation of tools and knowledge are essential to allow for the development of effective strategies based on the analysis, the suitable interpretation of the problem and the objectives, the peculiarities and complexities of the sector, and the destinations.

This research proposes therefore to undertake a contrasted analysis of the attitudes and perceptions of the nautical tourists visiting the Canary Islands and Morocco as nautical destinations. The study also explores the perceived image of the ports and marinas, and the tourists´ satisfaction with the nautical and leisure activities on offer at the destinations. The comparative approach is enriched by using a sample composed by different sub-segments of nautical tourists visiting both regions. Finally the market disposition to consume products and services from the other destination or indeed joint ones is also considered.

1. LITERATURE REVIEW

The nautical sector is characterised as being multifunctional, as it covers a wide and forever growing number of maritime activities. This multivariable nature means that the definition of nautical tourism may take on different focuses in scientific literature (Luković, 2007). The most global concept nowadays defines nautical tourism as a segment of people motivated by leisure, recreation and sports related to the sea (Ferradás Carrasco, 2001), or indeed with intentions to carry out a tourist activity with a clear maritime component (Luković, 2007).

Similarly, nautical tourism can take on different forms. The most studied in the academic and scientific fields are 1) Cruise tourism, 2) Nautical ports or Yachting tourism (sailing with or without one's own boat) and 3) Charter tourism (rental of boats for recreation or diving, with or without the ship's master). These are catalogued by many authors as key sub-segments of tourism because of the high economic profitability that they generate. One characteristic that these modalities have in common is that they are generally developed in ports, which obviously vary considerably in terms of structures, capacity, services and activities. Even when the offer of recreational nautical installations (RNI)[1] are wide and varied in Europe, it is the ports and marinas that maintain their role as the most important elements and commercial capital of the nautical tourism industry (Besteiro, 2004; Luković, 2012).

There are other modalities within the sector that are being considered with certain interest in the scientific production in recent years, because of the role that they are taking on in the diversification of the nautical offer at tourist destinations, and the boom that they are experiencing in tourism preferences at a global level. This refers to recreational nautical tourism, defined as tourists that travel to do water sports (kayak, jet boating, parasailing, sport fishing, water-skiing etc.) These activities are generally

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[1] The different types of RNI in Spain were established in 1975, by the Ministry of Public Works and Urbanism. The RNIs are classified as: Port, Marina or Maritime City, Dry Dock, Wharf, Maritime Base, Dock, Harbour and Marina Village (Gómez, 2012).

based at any type of RNI but also on the coast or beach (Gómez, 2012).

All the previous definitions of nautical tourism include a relationship between the tourist and the sea, which has led to another common denomination that emphasises the role of the sea as a resource, known as "maritime tourism" (Luković, 2012). The clash or criticism of concepts, classification and dilemmas is a topic, which is not greatly debated or agreed upon in scientific literature available on current tourism trends (Luković, 2013).

The services structure at the ports and marinas has been a topic with certain attention in scientific literature related to nautical tourism. These services can be classified using four criteria: A) Basic services, B) Peripheral services, which are the services directly related to the boats (electricity, water) or the equipment (fuel, maintenance, etc.); C) Basic derived services that are not necessarily linked to the basic services (toilets, swimming pool, dry docks, training centres, etc.), and D) Complementary services, those not linked to the nautical activity (e.g., the leisure and recreational tourism activities away from the sea) (Chapapría, 2000). Research has revealed that generally, managers of ports and marinas tend to prefer offering those services that are directly related to the needs of the boat users (safe drinking water, toilets, electricity, fuel, etc.), and consider the rest as less important (Chapapría, 2000). In that regard, there are authors that believe that this is the main problem in the design of the nautical products. They believe that it is often conceived from a business perspective by the owners and not from the point of view of the demand, and what they prefer, which clearly has to be the key to success (Kovačić and Gržetić, 2008).

Concerning the nautical tourism demand, publications are considered scarce (Lam González, De León and León, 2015). The findings reveal that diversity and combination of products and services are important variables that affect the nautical consumer´s motivations, as well as the concerns for the environmental and sustainable management of the marinas (Ferradás Carrasco, 2002; Jugović, Kovačić and Hadžić, 2011).

Some authors consider that not only the correct combination of nautical products and services, but also the leisure and recreation activities on offer at the destinations, constitute a determining factor in the success of business models (Rivera, 2010). Some other studies reveal that the combination of the recreational nautical activities (especially underwater activities, fishing, training in sailing and scuba diving), chartering and the tourist offer (e.g., celebration of events), are successful trends for some destinations (Ferradás Carrasco, 2002; De la Muela, 1998).

More recently, literature shows little advances in studying the consumer behaviour in nautical tourism. Authors such as Jovanovic, Dragin, Armenski, Pavic, and Davidovic (2013) have deeply studied constraining factors determining destination choice. There is a clear conviction that security of the marinas has an influence on the satisfaction of those seeking to do nautical tourism (Horak, 2013; Znidar; 2010). Other case studies show that for nautical tourists, the fact of having done water sports in other places beforehand has a direct influence on their motivations and decisions to return to the same destination (Suárez, Zoghbi and Aguiar, 2013).

Nevertheless, researchers announce that globally, science is not committed to the sector, and that is precisely because of this lack of knowledge production, that the industry has probably not reached its maximum (Luković, 2013). Advances in destination image and tourist satisfaction research, which is a greatly debated topic in tourism, because of the influence it has on the future behaviour of the tourist (Beerli and Martín, 2004; Chi and Qu, 2008), have not been deeply applied to the study of nautical tourism demand (Lam González et al., 2015).

Establishing policies for nautical tourism destinations has to be oriented towards the market, focused on the new trends and being conceived as a natural transition between land and sea, thus generating other activities of economic interest related to different tourist attractions and even with local community (Rivera Mateos, 2010 b). There are few scientific publications covering this idea.

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2. METHODOLOGY

Tourism activity has become a key sector for the Canary Islands and Morocco economies. The Spanish archipelago, with more than 11 million of tourists every year is positioned as a top quality tourism destination and the most important tourist cluster at a European level. On the other hand, Morocco, with more than 10 million of international tourist arrivals annually, is known as one of the most important tourism destinations in the Middle East and North Africa (Bouzahzah and El Menyari, 2013).

Concerning nautical tourism, the prior experience and tradition the Canary Islands have as a stopover port in the Atlantic, represent a strength 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. Moreover, the geographical proximity of the archipelago to Morocco, and their strategic position in the pathway from the Mediterranean to the Atlantic Ocean when crossing Europe towards America, are also considered underexploited strengths. It is believed that joint nautical tourism packages widen the spectre of market opportunities for the Canary Islands and represents a significant catalyst for the positioning of Morocco in the sector.

In 2014, according to official records, the total number of nautical tourists visiting the Canary Islands was superior to 1.8 million. This figure includes the sub-segments of cruises passengers and recreational nautical tourists, and excludes the group of yachtsmen stopping off at the ports and marinas (yachting tourism). Although the absence of the tourism statistics in the Canarian ports and marinas, the yachtsmen´s population in the archipelago can be estimated superior to 15,000 tourists (Figueira de Sousa and Serra, 2005). Official data at national and local level does not provide a true picture of the leisure marine industry in the archipelago. Nevertheless the population can be estimated superior than 20,000 vessels every year (Icomia, 2013; Figueira De Sousa and Serra, 2005) For the case of Morocco, unfortunately, nautical tourism statistics are non-existent. There is an incoherent and inconsistent data of the sector.

The sample of this study was built considering two sub-segments of the nautical tourism population:

1) Non-resident port users with boats moored at a marina or nautical port (yachtsmen), and
2) Tourists that usually do recreational nautical activities, conducting or planning to conduct this type of activities at the destinations (recreational nautical tourists). The sample was then organised into two separate segments and four groups. Each segment that hereon shall be referred to as ¨yachtsmen¨ and ¨tourists¨ was divided into two groups, according to the region where they were questioned. As can be perceived the study does not include the segments associated with cruisers.

The main research tool of the study was the questionnaire. Two types of questionnaire were developed:
a) A structured questionnaire aimed at boat users in transit at the marinas of both regions (yachtsmen), and
b) A structured questionnaire aimed at water sport lovers that do recreational nautical sports (tourists). Both surveys were structured in the same five sections, in order to facilitate comparing common aspects; 1.) Social demographic profile of the respondents, 2.) Travel planning variables, 3.) Perceptions and opinions of the nautical and leisure offer, and 4.) Future behavioural intentions and market opportunities for joint products and services.

With regards the method used for collecting the information, for this study we chose the exploratory sample method and carried out direct and individual questionnaires with personal interview because of the advantage this technique has for obtaining information otherwise not directly observable. If the tourists interviewed had never done water sports, the data was considered as null.

The questionnaires were conducted at the most important ports, marinas, clubs, sport centres, beaches, hotels and the main rental points of nautical equipment, in both regions, from November 2013 to June 2014. For the case of Morocco

The questionnaires were conducted at the most important ports, marinas, clubs, sport centres, beaches, hotels and the main rental points of nautical equipment, in both regions, from November 2013 to June 2014. For the case of Morocco the study was focused on a specific tourist area, the Souss Massa Drâa Region, one of the most important coastal tourism destination of the country. In this region there is only one marina, which is situated in the city of Agadir. Finally, a sample of 433 nautical tourists (tourists and yachtsmen) was obtained, and divided in four comparing groups. All the analysis were made in a comparative way between the groups and the destinations.

the study was focused on a specific tourist area, the Souss Massa Drâa Region, one of the most important coastal tourism destination of the country. In this region there is only one marina, which is situated in the city of Agadir. Finally, a sample of 433 nautical tourists (tourists and yachtsmen) was obtained, and divided in four comparing groups. All the analysis were made in a comparative way between the groups and the destinations.

Data analysis allowed to identify a demographic profile of each group of respondents as well as the characteristics of their trips. Frequency analysis and k-means permitted to analyse the nautical tourists´ perceptions of the ports and marinas, their attitudes and satisfaction regarding the nautical and leisure activities on offer at both destinations, and the future intentions in relation to the destinations and some transnational products and services.

The sample is composed mainly of European men with a high level of education, above the age of 40 and married. The scarce presence of women may be justified by the fact that nautical sports are still perceived as a segment reserved mainly for men (table 1).

Table 1. Sociodemographic profile of the respondents.

Variables	Canary Islands			Agadir	
		Yachtsmen	Tourists	Yachtsmen	Tourists
Sample size		n = 127	n = 158	n = 32	n = 116
Gender					
	Male	85.5	50.6	96.9	70.7
	Female	14.5	49.4	3.1	27.6
Age					
	> 65	18.1	6.3	31.0	31.0
	45-65	51.2	28.4	59.0	31.0
	25-44	27.5	47.4		30.1
Marital status					
	Married	77.6	64.5	62.0	62.9
	Single	22.4	31.0	38.0	23.3
Nationality					
	Spanish	47.0	4.4	62.5	6.0
	British	18.0	29.7		6.0
	German	8.0	12.6		25.0
	French	4.0	5.7	31.3	30.0
	Norwegian	5.0	14.5		
	Dutch	4.0	10.7		
Educational level					
	High degree	66.0	48.7	84.4	84.5
	High school	19.0	39.3	12.5	
	Primary education	10.0	10.8		6.0
Employment status					
	Businessman	21.8	16.4	15.6	25.0
	Professional	14.5	43.0	40.7	22.4
	Qualified worker	28.2	30.3	15.7	7.8
	Retired / Pensioner	25.0	7.5	28.0	34.5

Source: Prepared by the authors.

3. FINDINGS

3.1. TRAVEL PLANNING

Table 2 shows the descriptive statistics for the travel planning variables. The table only shows the most frequent responses of each group. The first significant aspect about the sample is the composition of the travel group. Tourists´ travel planning composition varies between yachtsmen and tourists but it does have a very similar structure in both regions. The yachtsmen interviewed generally travelled in groups, with friends or relatives, whereas the tourists in the sample chose more often to travel with a couple. In both regions and groups there were a low percentage of persons travelling alone. Secondly, the method of transport used by the travellers was questioned. To reach their destination the tourists almost always came by plane while the yachtsmen use only their own boats to reach their destinations. With reference to finding out the destination, the Internet and recommendations from friends and family were the most common means used by the sample in both regions. The results obtained show that the yachtsmen tended to prepare their trip earlier than the tourists, even when they had the method of transport at their disposition, given that in both regions there are a significant number of them that travel to participate in programmed crossings or organised events (nautical events), which require various months of planning. With regards the reason behind the trip, all of those questioned confirmed it was for nautical tourism (table 2).

Finally, the majority of interviewees had already had some previous experience in doing nautical activities at other destinations. The results by segments denote that among the yachtsmen that travelled to the Canary Islands, there were more amateurs (their first time) than those that travelled to Agadir. In the same way, among the tourists that travelled to Agadir, there were a greater proportion of people that had never done recreational nautical sports (table 2).

Table 2. Descriptive analysis for the travel planning variables.

Variables		Canary Islands		Agadir	
		Yachtsmen	Tourists	Yachtsmen	Tourists
Sample size		n = 127	n = 158	n = 32	n = 116
Travel group					
	Friends	33.0	23.0	37.0	23.0
	Family	28.0		19.0	
	Couple	23.0	46.0	12.0	62.0
	Alone	5.0	12.5	12.5	5.0
Means of transport					
	Sea	100.0	1.2	100.0	16.0
	Airplane	-	98.7	-	83.6
Means to finding out					
	Internet	41.0	26.5	23.1	31.0
	Nautical events	29.0		7.7	
	Family / Friends	30.7	42.4	17.9	37.9
	Tour operator/ Agency		39.2		22.4
	Magazines/ Guides			12.8	
First time					
	Yes	20.0	-	9.4	42.0
	No	80.0	100.0	90.6	58.0

Source: Prepared by the authors.

3.2. THE PORTS AND MARINAS

As mentioned earlier the ports are considered the most important asset in the nautical tourism sector, given that this is where the majority of the recreational nautical activities are carried out. A nautical tourist, even when carrying out the activities at the beach, generally tends to spend time at a nautical port or marina. It is for this reason that many businessmen see the port not only as the base for carrying out the sporting and recreational nautical activities but also as a tourist product per se.

According to the scores given by the nautical tourists of the sample, the ports and marinas in the Canary Islands and Agadir do not generate an optimum image. On a five point scale, where 1 means very negative image and 5, very positive image, mean scores given by the groups of yachtsmen and tourists were 3.6 and 3.8 respectively for the Canary Islands and 3.4 and 3.3 for Agadir. It is worth noting that for Agadir although the evaluations were slightly inferior, they were very similar to those of the Canary Islands, despite the fact that the Moroccan region is considered an emerging sector with fewer infrastructures and products and services on offer. This denotes, on one hand, that the conditions the Marina at Agadir presents are equal to those of any Canarian port and secondly, that there are factors that are affecting the perceived image of these nautical installations. As regards the yachtsmen, that give values lower than those given by the tourists for both regions, the perceived image may also be influenced by the more intensive use of the services at the port.

Some relevant attributes of these installations were also questioned; such as the situation and accessibility, the security, infrastructures, environmental management and services. Descriptive statistics are shown in table 3. Firstly, it was decided to evaluate situation and accessibility, given that the climatic conditions at the marina of Agadir were considered not to be ideal for doing recreational sailing. Security was chosen given that it was supposed that the Canarian ports offered greater security to the yachtsmen than those offered at the Moroccan ports, as was the case with the services offered.

Finally, we have been able to conclude that the basic services offered at the ports and marinas are seen as the most negative attribute by the four groups of respondents, which surely is influencing the overall perceived image of these installations. According to the differences between the groups, it is possible to detect that yachtsmen have a very different perception of image to that of the nautical tourists, probably because they spend more time and use more intensively the services at these nautical installations. The attribute situation and accessibility for example, is evaluated from the sea and not from the land, and those aspects related to security, infrastructures and environmental management are also evaluated from other perspectives.

Concerning the Canarian ports, the situation and accessibility (including meteorological conditions, wind movements and quality of the waters) was the only attribute valued above 4 that is "positive image", and was the best attribute scored by the yachtsmen. The services was the worst valued attribute for the whole sample. For the services attribute, the respondents only evaluated the basic services (toilets, swimming pool, teaching centres, etc.). By this, it was possible to carry out a comparative analysis between yachtsmen and tourists. It is worth noting that none of the aspects were given high estimations for the Canarian ports (table 3).

On the other side, the Marina of Agadir received always lower scores than those of the Canary Islands, and tourists constantly gave a higher value than the yachtsmen. The yachtsmen gave constantly around 3 for environmental management and the situation and accessibility, arguing that for the last point, sailing that area in the Atlantic often requires training and is difficult for those with little experience. The attribute security received the highest mean scores in Agadir, which probably means that the nautical tourists´ previous expectations about the destination have been exceeded (table 3).

Finally, we have been able to conclude that the basic services offered at the ports and marinas are seen as the most negative attribute by the four groups of respondents, which surely is influencing the overall perceived image of these installations. According to the differences between the groups, it is possible to detect that yachtsmen have a very different perception of image to that of the nautical tourists, probably because they spend more time and use more intensively the services at these nautical installations. The attribute situation and accessibility for example, is evaluated from the sea and not from the land, and those aspects related to security, infrastructures and environmental management are also evaluated from other perspectives.

Table 3. Descriptive analysis of the ports and marinas´ attributes.

Attributes	Canary Islands		Agadir	
	Yachtsmen	Tourists	Yachtsmen	Tourists
Situation and accessibility	4.5	4.0	3,0	3.7
Security	3.3	3.9	3.5	3.8
Infrastructures	3.6	3.8	3.1	3.5
Environmental management	3.3	4.0	3.0	3.7
Services	2.8	3.7	2.9	3.4

Attributes were measured on a Likert-type scale (1 = very negative and 5 = very positive image)

Source: Prepared by the authors

3.3 THE NAUTICAL AND LEISURE OFFER

Data regarding the valuation of the nautical and leisure activities on offer at the destinations was collected. In this group of questions the interviewees were asked to give a value between 1 and 5, where 1 was wholly dissatisfied and 5, highly satisfied, for each of the nautical activities carried out during the stay. Table 4 shows the level of satisfaction tourists have with the most frequent nautical activities carried out (each of the nautical activities shown in the table has been carried out for at least 40% of the sample groups).

It can be seen some common preferences among the groups of yachtsmen and tourists, regardless the destination visited. After sailing, sport fishing, chartering and kayaks are the most commonly preferred nautical activities among yachtsmen. In general, the tourist satisfaction with the nautical offer at the Canary Islands was on average. For yachtsmen and tourists the mean scores were 4.1 and 3.8 respectively. Yachtsmen´s satisfaction with sailing and sport fishing activities were the most positive scores. For Agadir, carrying out nautical activities was perceived as having a below average satisfaction. The latter evaluation was mainly made according to the lack of quality services and the service experience offered by the nautical companies, many claiming that they were emerging and improvised companies. For the groups of yachtsmen in Agadir the average level of satisfaction with the nautical and sporting offer was 2.8. For the group of tourists the mean score was 3.1 (table 4).

Table 4. Tourist satisfaction with the nautical activities on offer at the destinations.

Attributes	Canary Islands		Agadir	
	Yachtsmen	Tourists	Yachtsmen	Tourists
Sailing	4.1		2.6	
Sport fishing	4.0		4.0	
Chartering	3.8		3.7	
Kayaks	3.8	4.0	3.3	
Scuba diving	3.9	3.8	2.8	2.4
Jet ski	3.6	3.9	3.8	3.4
Surf-windsurf		4.0		3.3
Boating	-	4.0		3.1
Overall satisfaction	4.1	3.8	2.8	3.1

Variables were measured on a Likert-type scale (1 = wholly dissatisfied and 5 = highly satisfied)
Source: Prepared by the authors.

As far as the tourist activities are concerned, questions regarding accommodation and other aspects were asked, giving the possibility to the interviewees to choose the activities they prefer doing during their stay and to evaluate them according to the experience lived. With regards the accommodation the results show that tourists typically used hotels, and yachtsmen, their own boat. Yachtsmen choose hotels as a second type of accommodation in very few cases. The satisfaction for accommodation services in the Canary Islands was on average 4, on a scale of 1 to 5 where 1 was wholly dissatisfied and 5, highly satisfied. For Agadir, the level of satisfaction for accommodation was 3 on average for the whole sample. In the study, the location of the accommodation was not defined.

With regards to the leisure offer, the interviewees were asked to give values in a range from 1 to 5, where 1 is wholly dissatisfied and 5, highly satisfied, to the tourist products and services on offer at the destinations, according to the experience lived. Table 5 shows the most frequent tourist activities carried out by the groups of nautical tourists, as well as the mean scores given to the satisfaction level with each experience. In general, the level of satisfaction with the tourist offer at Agadir tends to be lower than that for the Canary Islands. At the same time, yachtsmen tend to be less satisfied than tourists in both regions.

It is important to make note of the similarities that exist among the groups of yachtsmen and tourists, regarding their preferences for tourist activities. Yachtsmen at both destinations tended more to go shopping or eat out. In the Canary Islands the yachtsmen also tended to do sports and in Agadir make cultural visits. With regards the tourists, swimming was the main activity carried out outside the nautical area, both for the sample at the Canary Islands and that of Agadir. In addition, at the Canary Islands the tourists chose to do more sporting activities in the sea, but different from those related to the reason behind the trip itself. In Agadir the tourists tend to choose more to go on hiking and play golf as part of the complementary tourist activities (table 5).

As far as both regions is concerned, none of the activities received high values, which means that the nautical tourists´ expectations had not been met at the time of being interviewed. These evaluations denote that not only at Agadir, but also at the Canary Islands, the tourist offer requires some improvements in order to increase the users' level of satisfaction (table 5).

Table 5. Frequency analysis and tourist satisfaction with the leisure activities on offer at the destinations.

Yachtsmen				
Activities	Canary Islands		Agadir	
	%	Mean	%	Mean
Restaurants	89.0	3.8	69.0	2.9
Shopping	86.0	3.6	86.4	3.2
Sport activities	57.0	3.8		
Nature activities	48.0	3.8		
Night life activities			62.5	3.3
Cultural visits			75.0	3.1

Tourists				
Activities	Canary Islands		Agadir	
	%	Mean	%	Mean
Swimming	38.0	4.2	25.0	3.2
Other nautical sports	26.6	3.7	17.5	3.2
Hiking	12.0	4.5	16.0	3.5
Cycling	10.0	4.3		
Golf			9.0	3.4
Paragliding			7.8	3.1

Variables were measured on a Likert-type scale (1 = wholly dissatisfied and 5 = highly satisfied)

Source: Prepared by the authors.

3.3 Future behavioural intentions and market opportunities for joint products and services

At this stage data resulting from the tourists´ future intentions to recommend and repurchase the destinations was analysed. As far as the Canary Islands are concerned, the intentions of the yachtsmen and tourists to recommend the destinations are high. Although for 38.6% of the tourists this was their first time visiting the Archipelago, almost 98% of them were going to recommend the destination. Similarly, but in less proportion (81.9%) the yachtsmen would also recommend the islands. It is noticed a high level of repeaters among the group of yachtsmen. The 99% had already visited the islands on a previous occasion. For Agadir, the number of visitors staying for the first time was higher, particularly among the yachtsmen (71.9%). In the same way, 39% of the tourists group visiting Agadir were doing so for the first time; however, nearly 88% of them would indeed, recommend the destination to family and friends (table 6).

This set of questions reveals the first significant differences among the groups of the same segment. While yachtsmen in the Canary Islands tend to be repeaters (99% had already visited the destination), there is a greater proportion of first visits within the group of yachtsmen in Agadir. At the same time, there are more positive intentions among the group of tourists to repurchase the nautical destination Agadir, than for those visiting the Canary Islands (table 6).

Table 6. Tourists´ intentions to recommend and repurchase the destinations.

Variables		Canary Islands		Agadir	
		Yachtsmen	Tourists	Yachtsmen	Tourists
To recommend					
	Yes	81.9	97.5	96.5	87.5
	No	18.1	2.5	3.5	12.5
To repurchase					
	Yes	97.5	69.8	57.0	87.5
	No	2.5	30.2	43.0	12.5
First visit					
	Yes	1.0	38.6	71.9	39.0
	No	99.0	61.4	28.1	61.0

Source: Prepared by the authors.

Finally, the market disposition to consume products and services from the other destinations or indeed joint ones was questioned. Respondents visiting the Canary Islands stated that Morocco was very much known as a destination for nautical tourism. Firstly, all the tourists stated that during their stay in the Canary Islands the most advertised destinations were Agadir and Tunis. Secondly, 75.6% of the yachtsmen staying in the Canary Islands had already sailed in Moroccan waters. Thirdly, 13.4% of the yachtsmen group questioned in the Islands had already used a Moroccan port at some time in their lives.

As far as the tourists visiting Agadir were concerned, besides the fact that 60% of the sample were Spanish, the rest of the nationalities knew the Canary Islands very well, and had even visited, some as nautical tourists and others as beach goers. The yachtsmen in Agadir also stated that their favourite place for sailing were the Canarian islands. Spain was in first position in the ranking of preferences of yachtsmen in Agadir, followed by Portugal and in third place, Agadir itself. This extensive level of knowledge and use of what is on offer at the other destination suggests that there is a common market for both regions, which should be evaluated in greater depth in future studies.

Furthermore, the respondents were asked about their disposition to consume transnational products and services. More the 60% and 80% of the total interviewees in the Canary Islands an Agadir respectively said they would probably consume some type of joint tourist packages. The disposition of the tourists visiting Agadir was notably higher than those that visited the Canary Islands (table 7).

The 74% of the yachtsmen visiting the Canary Islands stated they would join a sailing race Canary Islands-Morocco. On the contrary, yachtsmen in Agadir do not show a high disposition for the consumption of combined activities. During the interviews it was possible to collect some relevant qualitative information according to this.

Morocco is considered as being a region with a certain amount of difficulty for sailing because of the climate, according to the tourists questioned in the Canary Islands. In relation to the climate, the tourists at Agadir stated that another difference between the Moroccan and Canarian waters, was that the prior are not able to be used all year round, at least not for certain recreational nautical sports. However, the yachtsmen stated that for sailing the conception of ideal meteorological conditions is different and that the Moroccan coasts posed certain difficulties in comparison with the Canary Islands, but that the climate was however favourable for sailing all year round. These statements make us reconsider the theory behind the fact that nautical tourism has a non-seasonal effect for the tourist economies, at least from a global point of view. As regards the Canary Islands, the climate favours nautical tourism all year round but for Agadir the climate does have an influence and is key for doing recreational nautical sports.

Table 7. Disposition to the consumption of transnational products and services.

Aspects	Canary Islands		Agadir	
	Yes	No	Yes	No
	n = 285		n = 148	
Willingness to consume joint tourist packages Canary Islands-Morocco	60.9	39.1	80.0	20.0
	n = 127		n = 32	
Willingness to participate in a sailing race Canary Islands-Morocco	74.0	26.0	42.0	58.0

Source: Prepared by the authors.

CONCLUSIONS

In the research carried out, it has been seen that attitudes and perceptions in nautical tourism vary according to the different sub-segments, existing clear different profiles and trends between a nautical tourist doing sailing and a nautical tourist pursuing other type of recreational nautical activities.

In general terms, the ports and marinas at the Canary Islands (Spain) and the Souss Massa Drâa Region (Morocco), do not currently generate an optimum image, according to the nautical tourists´ perceptions. The tourists and yachtsmen found that their expectations with the services offered at the nautical installations visited were not fulfilled, being this attribute, the most negative valuated aspect. Other attributes such as security, infrastructures and environmental management neither generated very positive valuations, which shows the necessity to study this aspect more in depth in order to improve it. Agadir, however, considered an emerging nautical destination with poorer infrastructures and products and services on offer in comparison to the Canarian ports, is considered to have a similar perceived image to that of the Canary Islands according to the tourists and yachtsmen that have visited it. This indicates that the conditions of the Marina de Agadir are similar to any of the Canarian ports. The evaluations given by the yachtsmen were indeed less positive than those of the tourists, seemingly because they are less satisfied with the services offered for the boats.

According to the tourist satisfaction with the nautical offer at the destinations, data analysis reveals that the market expectations have not been met and thus it is required a requalification of the nautical tourism enterprises at both regions. Although the Canary Islands are considered a nautical destination with certain accumulated experience in the sector, tourists' perceptions were not very positive. Agadir, as an emerging nautical destination, received less positive valuations than the archipelago. This indicates the necessity of proposing meaningful improvements in the Moroccan nautical tourism industry.

As far as the recreational offer is concerned, it can be seen that there is a clear segmentation between the preferences of tourists and yachtsmen, regardless the destination they are visiting. Shopping and eating out are the favourite activities of the yachtsmen, whereas the tourists, other than the main reason for their holiday (water sports), prefer sports related to active, nature and maritime tourism. This information is very useful in order to design nautical tourism packages with high market potential. According to the tourists´ perceptions it was found that in both regions, the tourist offer requires some improvements in order to increase the users' level of satisfaction. These results provide useful information to tourism stakeholders.

It should be highlighted that in Agadir, where high evaluations for satisfaction were not given for the tourist activities on offer at the destination, nor for the nautical activities, the positive intentions of the nautical tourists to repurchase and recommend the destination are high. The sense of security and some emotional factors are probably influencing said future intentions. This topic shall be studied more in depth in the future.

It has also been demonstrated that there is a mutual recognition by both destinations and similar preferences on activities to be carried out, which is directly related to the profile of nautical tourists that visit this part of the world. The yachtsmen's preferences for organised crossings allow for the design of innovative products. Also, the fact that there are difficulties in Moroccan waters could lead to the creation of professional circuits and competitions for a specific market niche.

Nevertheless, the desired renovation in nautical tourism will depend on the attention given to the ports´ basic services and the qualification of the nautical tourism enterprises in both regions. The Canary Islands have a long history in the development of the tourism sector, particularly from small local companies that could be used as a basis for developing the African market. Furthermore, the internationalisation of the Canarian nautical enterprises can also contributes to rise their competitiveness capacities. The research provides up-to-date and useful information if reflected in the current promotional and specialisation strategies.

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