EUROPEAN NAUTICAL TOURISTS: EXPLORING DESTINATION IMAGE PERCEPTIONS

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Abstract
Purpose – Nautical tourism is considered to be an under-exploited research area, if we take into account its evolution and growth prospects. This lack of knowledge is probably one of the main reasons the sector has not reached its maximum. The present paper aims at exploring the European nautical tourists´ perceptions of image, in relation to the type of nautical sport they carry out and the type of nautical destination they visit.
Methodology – The research was conducted in the Canary Islands and Morocco during 2013 and 2014. The sample covered 433 European nautical tourists pursuing different nautical sports and was organised into two groups. Structured questionnaires with personal interviews were implemented. Choosing a mature nautical destination and an emerging one enriched the comparative approach for the study.
The findings indicate there are clearly similar profiles amongst the groups of tourists visiting both regions, and that the perceived image varies between a nautical tourist doing sailing and a nautical tourist motivated by other nautical sports. The data analysis reveals that perceptions also vary according to the more intensive and extensive use of the destinations.
Originality – This empirical study provides useful insights into the demand for nautical tourism, the perceptions and evaluations of the ports and marinas as well as the destinations themselves, which can be used as a guide for the tourism industry managers and the Government Authorities to develop more effective marketing and positioning strategies. The study of the destination image in nautical tourism is a contribution to the progress beyond the state of the sector.
Keywords Nautical tourism, nautical destination, perceptions, image, nautical sports

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, inductor of other services, the impetus that they provide to the qualification and diversification of the coastal infrastructures and their technological innovation are only some of the attributes that reinforce this statement (Carrasco, 2001). It is also easy to observe the high capacity the nautical recreational activities have to adapt to the new trends in tourist demands, 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 the high profitability potential (Carrasco, 2002; Mateos, 2010).

Nautical tourism, still considered an under studied field in Spain, has been defined as a strategic sector with a significant role in the development of tourism in the country (Gómez, 2012). In this context, the Canary Islands are considered one of the most important nautical destinations in Spain. 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) (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 and accumulated experience of the archipelago as a nautical destination and its need to reinvent their offer as a mature tourist destination turn this sector into an opportunity for the sustainability of the Canary Islands (Parreno, 2008). Such is the conviction that the Canary Islands can be positioned as a nautical destination of excellence at a global level, that the local Public Administration has made a commitment to specialise the archipelago in nautical tourism with public strategies already in place to motivate the planning, diversification and innovation, thus increasing the competitiveness of the destination and the international promotion of the same.

Morocco on the other hand, despite the excellent natural conditions and materials 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 (nautical 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.

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 represent a significant catalyst for the positioning of Morocco in the sector. However, the renovation of nautical tourism is denoted as being a very complex process in academic literature, mainly because of the large number of agents and factors that take part (Rebollo and Castiñeira, 2010). To achieve the objectives, it is not sufficient to have political disposition and economic promotion in place. The creation of tools and knowledge are also essential in order 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, the market, and the destinations themselves. The present study aims to provide insight into the demand for nautical tourism, by exploring the perception of the Canary Islands and Morocco as nautical destinations, which is considered a poorly researched field. The opinions and impressions of visitors about the destination are a determining factor as far as the intention and the decision to return or recommend the destination to others are concerned (Beerli and Martin, 2004; Chi and Qu, 2008). Also, tourism-related literature has acknowledged the value that the studies into a destination's image have on the development of effective destination marketing and positioning strategies (Baloglu and McCleary 1999; Beerli and Martin 2004).

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 is complex, and may take on different focuses in scientific literature (Luković, 2013). The most global concept nowadays defines nautical tourism as a segment of people motivated by leisure, recreation and sports related to the sea or indeed with intentions to carry out a tourist activity at the destination with a clear nautical component (Carrasco, 2001; Luković, 2007). Until now, all the definitions agree that nautical tourism includes a strong relationship between the tourist and the sea. This relationship has led to another common denomination known as "maritime tourism" (Hall, 2001; Luković, 2012; Orams and Lück, 2014). However, authors do not agree on a global classification, spatial criteria, the means of transport and the nature of the travel that distinguishes maritime tourism from ¨nautical tourism¨, ¨seaside tourism¨ or ¨marine tourism¨. The clash or criticism of concepts, classifications and dilemmas is still an ambiguous area, which is not greatly debated or agreed upon in the scientific literature available on current tourism trends (Kizielewicz, 2012; Luković, 2013).

Nautical tourism can take on different forms. The most studied sub-segments in the academic and scientific fields are cruises, nautical tourism ports (yachtsmen with or without their own boat) and the chartering of boats (rental of boats for recreation or diving, with or without the ship's master). Many authors catalogue the above as key sub-segments of the tourism industry because of the high economic profitability they generate. One characteristic that these modalities have in common is that they are generally developed in ports, which obviously vary considerably in their structures, services, magnitude and activities. Even when the offer of recreational nautical installations (RNI)[1] is very wide and varied, it is the nautical ports and marinas that maintain their role as the most important element and commercial capital of the nautical tourism industry. ¨Yachting tourism¨ and ¨sailing tourism¨ are more contemporary denominations linked to the sub-segments of nautical tourism ports and charter tourism (Besteiro, 2004; Luković, 2012).

There are other modalities within the sector that are considered with certain interest in the contemporary scientific production, 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

[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).

experiencing in tourism preferences at a global level (de la Muela, 1998; Carrasco, 2002; Besteiro, 2004). This refers to the recreational nautical tourism, which are those tourists motivated by water sports (derivatives of sailing and rowing, underwater and sports fishing, skiing, surfing etc.). These activities are generally based at any type of RNI but can also be found on the coast or beach, depending on their characteristics (Gómez, 2012).

References to the demand for nautical tourism in scientific research are very limited. Researchers announce that globally, science is not committed to the sector, which is confirmed by the especially low number of investigations that have been undertaken in comparison to its economic growth and prospects, even in times of a global economic crisis. It is precisely because of this lack of knowledge production, that the sector has probably not reached its maximum (Luković, 2013). The study of the demand for nautical tourism takes on importance because of the role it plays in the development of the sector. Establishing policies for nautical tourism has to be oriented towards the market, focused on the new trends emerging and on the natural transition between sea and land, thus generating other tourist activities of economic interest for the destinations as well (Mateos, 2010; Rebollo and Castiñeira, 2010). The research in nautical tourism has revealed that, generally, the nautical products and services on offer at the destinations seem to not respond to the point of view of the nautical tourists, and what they demand, which is considered the main problem in the design of the nautical offer (Chapapría, 2000; Kovačić and Gržetić, 2008).

The literature on tourism states that the positive experience tourists have in general with respect to the destination can have an impact on their future behaviour, as far as their intention to repeat the visit or recommend the destination to friends or family members is concerned (Chi and Qu, 2008). According to this, some authors have argued that, for nautical tourists, a positive experience is in part related to the variety and combination of the nautical products and services on offer at the destinations. At the same time, the sense of security and the environmental and sustainable management of the marinas are also considered key variables for nautical tourism satisfaction. They affirm also that proper structuring of nautical sports and tourist services can favour the future demand for nautical tourism (Chapapría, 2000; Carrasco, 2002; Jugović, Kovačić and Hadžić, 2011; Horak, 2013).

It is precisely the individual perceptions, experiences and opinions about a destination that create a holistic picture in the mind of the tourist, what is determined as the destination’s image. Some empirical researches have studied how a destination’s image has a determining effect on behavioural intentions (i.e. intention to revisit and willingness to recommend), conditioning therefore the decision-making behaviour of tourists (Chen and Tsai, 2007). In general, the scientific research states that a destination’s image is an influence of perceptions, future behavioural intentions and choice processes (Crompton 1979; Bigné, Sanchez and Sanchez, 2001; Beerli and Martin, 2004; Papadimitriou, Apostolopoulou and Kaplanidou, 2013). Consequently, some authors have said that the study of perceptions, opinions and impressions of visitors about a destination is crucial not only to understand future behavioural intentions and decision making processes, but also for the development of successful destination marketing and positioning strategies (Baloglu and McCleary, 1999; Beerli and Martin, 2004; Chi and Qu, 2008; Qu, Kim and Im, 2011). Although the majority of destination image studies are focussed on cognitive components, with some exceptions (Hosany, Ekinci and Uysal, 2007), the destination's image is composed of two components: cognitive and affective (Crompton, 1979), and both have to be included in the study of the destination's image. Finally, it should be pointed out that, in nautical tourism, studies on destination image are almost inexistent.

2. FIELDWORK, SAMPLING AND METHODOLOGY

The sample of this study was built with two sub-segments of nautical tourism: A) Nautical tourism ports (Non- resident port users with boats based at a port, and port users in transit with boats moored at a port and B) Recreational nautical tourism. The sample was then organised into two separate groups that hereon shall be referred to as ¨yachtsmen¨ and ¨tourists¨, for both regions. As can be perceived the study does not include the segments associated with cruisers or tourists chartering boats.

Two types of questionnaire were developed; A) A structured questionnaire aimed at boat users based at or in transit at the marinas of both regions (yachtsmen), and B) A structured questionnaire aimed at water sport lovers (tourists). If the tourists interviewed had never done water sports, the data was considered to be null. The structure of the questionnaire in both cases was the same in order to facilitate comparing common aspects. It consisted of five sections: socio-economic and demographic variables; travel planning variables; multiple choice questions about the perceived image of the nautical ports and marinas; tourists´ evaluation of some attributes of the destination image for nautical tourism; tourists´ evaluation of the affective image, and questions concerning overall image and behavioural intentions. All the items were analysed with a comparative approach between the sub-segments of nautical tourists and the different regions.

With regards the method used for collecting the information, for this study we chose the exploratory method and carried out direct and individual questionnaires with personal interviews because of the advantage it has for obtaining information otherwise not directly observable. The port is the only RWI evaluated, given that it is the only installation that has been visited by the whole sample. However, the questionnaires were conducted at ports, 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 region, the Souss Massa Drâa Region, one of the most important coastal tourism destinations. In this region there is only one marina, which is situated in the city of Agadir. A sample of 433 nautical tourists was obtained. It should be noted that it was the intention of the researchers to create comparable sub-samples of yachtsmen, whose main motivation behind the trip was to sail, and tourists, whose main motivation was to do other nautical sports at the destinations. Table 1 shows the socio-economic and demographic profile of the respondents.

Table 1: **Sample size and socio-economic and demographic profile of the respondents**

Variables		**Canary Islands %**	**Agadir %**
Size	Yachtsmen	n= 127	n = 32
	Tourists	n = 158	n = 116
Gender	Yachtsmen	Male 85.0	Male 96.9
	Tourists	Male 51.0	Male 71.0
Age	Yachtsmen	46-65 51.0	> 40 59.0
	Tourists	25-34 29.0	> 64 31,0 ; 25-34 20.0
Marital status	Yachtsmen	Married 67.0	Married 62.0
	Tourists	Married 39.0 ; Single 31.0	Married 63.0
Nationality	Yachtsmen	Spanish 47.0; German & British 20.0	Spanish 59.0; French 31.3
	Tourists	British 30.0 ; Norwegians & German	French & German 30.0
Educational level	Yachtsmen	Middle & Higher education 66.0	Higher education 59.0
	Tourists	Higher education 49.0	Higher education 63.0
Employment status	Yachtsmen	Businessman, qualified workers & technicians 47.0	Retired 28,0 ; Civil servant 25.0
	Tourists	Worker-autonomous 47.0	Retired 34.0

Source: Prepared by the authors

This sample is made up of European nautical tourists, mainly men with a high level of education, qualified or retired businessmen above the age of 40. The scarce presence of women may be justified by the fact that nautical sports are still perceived as a segment reserved mainly for men. The first significant aspect about the sample is the composition of the travel group. Said composition varies between yachtsmen and tourists that do recreational nautical activities but it does have a very similar structure for both regions.

The yachtsmen interviewed generally travelled in a group, usually with friends or family members, where as the tourists in the sample chose often to travel with a couple. In both regions and groups there were a low percentage of persons travelling alone. Secondly, to reach their destination the tourists almost always came by plane while the yachtsmen use only their own boats to reach their destination. The Internet and recommendations from friends were the most common means used within the sample for 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 (regattas), which require various months of planning (table 2).

Table 2 shows the nautical sports and tourist activities that are most demanded by the yachtsmen and tourists. It is worth noting that all respondents had carried out more than one nautical sport during their trip with very similar preferences between yachtsmen and tourists. With regards to the rest of the tourist products and services on offer at the destination we can conclude that the yachtsmen´s preferences at both destinations are shopping and eating out. 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 however, the tourist tends to choose to go on excursions and play golf more as part of the complementary tourist activities. It is important to note the similarities that exist between the preference in tourist activities for the yachtsmen and tourists, regardless of the destination they chose. It can be assumed that generally, the tourists that travel to do recreational nautical activities use their time also to enjoy a wide variety of other water sports and active tourism activities on offer, whereas the yachtsmen tended to choose other types of perhaps calmer activities.

Table 2: **Travel planning variables**

Variables		**Canary Islands %**	**Agadir %**
Compilation of the travel group	Yachtsmen	Friends 33.0 ; Family 28.0	Friends 37.0 ; Family 19.0
	Tourists	Couple 46.0 ; Friends 23.0	Couple 62.0 ; Friends 23.0
Means of transportation	Yachtsmen	Boats 100.00	Boats 100.00
	Tourists	Plane 99.00	Plane 84,00
Types of accommodation	Yachtsmen	Boats 85.00 ; Hotel 15.00	Boats 94.00 ; Hotel 6.00
	Tourists	Hotel 87.00	Hotel 100.00
Means to finding out the Destination	Yachtsmen	Internet 41,00 ; Events 29,00	Events 31,00 ; Internet 23,00
	Tourists	Friends 28,00 ; Internet 27,00	Friends 35,00 ; Internet 31,00
Main nautical sports carried out during the trip	Yachtsmen	Sailing; sport fishing ; charter; surf/windsurf ; kayaks ; scuba diving	Sailing; sport fishing ; charter; surf/windsurf ; kayaks ; jet sky
	Tourists	Skin diving; charter ; watercraft ; surf/windsurf ; water skiing	Jet ski ; charter ; watercraft ; surf/windsurf ; sport fishing
Main tourist activities carried out during the trip	Yachtsmen	Restaurants 89.00; Shopping 86.00; Sports 57.00	Restaurants 69.00; Shopping 59.00; Cultural visits 38.00
	Tourists	Swimming 38.00; Nautical sports 27.00; Scuba diving 20.00	Swimming 25.00; Excursions 16.00; Golf 9.00
First time as nautical tourists	Yachtsmen	Yes 20.00	Yes 9.00
	Tourists	Yes 0.00	Yes 42.00

Source: Prepared by the authors

Finally, the majority of interviewees had already had some previous experience in doing nautical activities. 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).

The perceived image was measured by requiring respondents to evaluate different attributes of the ports and marinas and the destinations, through a Likert-type scale, where 1 = very negative and 5 = very positive image. This methodology has been implemented following guidance from existing literature (Baloglu and McCleary 1999; Bigné, Sanchez, and Sanchez 2001; Kneesel, Baloglu, and Millar, 2010). This preliminary study analyses the relevant attributes for nautical tourism. In order to measure the affective perception a five-point bipolar scale and six-items was used: exciting/gloomy destination, genuine/synthetic destination, sustainable/unsustainable destination, dynamic/quite destination, happy/unhappy destination and healthy/unhealthy destination. These items were based on prior empirical studies (Baloglu and McCleary, 1999; Chen and Uysal, 2002; Hosany, Ekinci, and Uysal 2007). The items measured were chosen in order to achieve greater consistency with the nature-based element of this type of tourism.

3. FINDINGS

3.1. Perceived image of the ports and marinas

As mentioned earlier, the port is considered the most important asset in the nautical tourism sector, given that this is where the majority of the recreational and sporting nautical activities are carried out. A nautical tourist, even when carrying out the activities at the beach, generally tends to spend the evening at a port or marina, and even, a tourist that for specific reasons does not carry out nautical tourism, but would like to, tends to prefer areas around the ports or marinas when choosing accommodation. 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.

The image generated by the marinas at the Canary Islands and Agadir for the sample of those questioned is average. The mean values for the group of yachtsmen and tourists were 3.69 and 3.80 respectively for the Canary Islands and 3.40 and 3.60 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 they are 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 present are equal to those of any Canarian port and secondly, that there are factors that affect the general image of these installations**,** given that they received values on the questionnaires that were lower than 4 ("positive image"). As regards the yachtsmen, they gave almost always lower values than those given by the tourists for both regions; the perceived image seems to be influenced by their more intensive usage of the port (table 3).

Some selected attributes of the ports and marinas such as the situation and accessibility, the security, the infrastructures, the environmental management and the general service were independently evaluated by the respondents. It is estimated that the climatic conditions at the marina of Agadir make it not an ideal area for yachting. Security was chosen as an attribute to evaluate, given that it was estimated 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. The results are shown in table 3.

The results show that for the Canarian ports the situation and accessibility (including meteorological conditions, wind movements and quality of the waters) was the only attribute rated above 4, and was the best rated attribute by the yachtsmen of the sample. As far as Agadir was concerned, the situation and accessibility is not perceived as well as in the Canary Islands by the yachtsmen, as they argue that sailing around the Atlantic often requires training and that it is difficult for those with little experience.

The attribute ¨security¨ was the best evaluated by the yachtsmen and tourists in Agadir and was even higher than the values given for the Canary Islands. Interviews reveal that the tourists visiting Agadir always have very low expectations of security, which probably influences their final perceptions. It is important to remark that the yachtsmen gave lower values to the security variable than the tourists do, at both destinations. Interviews reveal that yachtsmen's evaluations were influenced by (little) incidents with their boats.

Table 3: **Perceived image of the ports and marinas considering some attributes**

Attributes*	**Canary Islands**				**Agadir**			
	Yachtsmen		Tourists		Yachtsmen		Tourists	
	Mean	*SD*	*Mean*	*SD*	*Mean*	*SD*	*Mean*	*SD*
The situation and accessibility	4.50	.70	4.00	.70	3.00	.70	3.70	.70
The security	3.30	.96	3.90	.86	3.50	1.08	3.80	.96
The infrastructures	3.60	.92	3.80	1.05	3.10	.93	3.50	.92
The environmental management	3.30	1.02	4.00	.89	3.00	1.05	3.70	1.15
The services (toilets, swimming pool, restaurants)	2.80	.70	3.70	.70	2.90	.70	3.40	.70
Total sample	3.69		3.80		3.40		3.60	

* All attributes were measured on a Likert-type scale (1 = very negative and 5 = very positive image). SD- Standard Deviations

Source: Prepared by the authors

The variable services (toilets, swimming pool, restaurants, facilities, teaching centres, etc.) offered by the port was the attribute that received the worst mean scores within the sample in both regions, especially the values given by the yachtsmen who gave the lowest estimations. In order to be consistent in the comparative analysis with the rest of nautical tourists questioned, the basic services such as the price of the mooring, the supply of fuel, electricity and water for the boats, etc., were not included in this evaluation. However, specific questions to the yachtsmen reveal that the satisfaction with these basic services was not high. For the Canary Islands, 54% of the yachtsmen interviewed evaluated them as "acceptable", showing a lack of satisfaction with some services, and for Agadir, only 42% of yachtsmen indicated the basic services as being ¨good¨ (table 3).

In summary, the situation and accessibility of the Canarian ports was the best rated attribute within the sample, while the attribute of security received the best estimations within the sample of tourists in Morocco. At the same time yachtsmen and tourists at both regions agree that the general services is the worst attribute of the ports and marinas at both destinations, arguing that there is a lack of quality and that their expectations were not met. It is worth noting that the yachtsmen's perceptions vary according to the different use they give to the port. The situation and accessibility for the yachtsmen is observed from the sea and not from the land as for the tourists. The rest of the aspects relating to security, infrastructures and environmental management are also evaluated from other perspectives. Finally, we have been able to confirm that none of the attributes were given high estimations and that perceived image was not positive at all (on average).

3.2. Destination image

As far as the destination's image is concerned, questions regarding the evaluation of attributes were asked; giving the possibility to the interviewees to evaluate these items according to their perceptions and experience lived. The items were chosen according to those attributes that seemed relevant for nautical tourists. According to the literature review, the combination of nautical and tourist activities, the environmental management and the security and accessibility are all important variables for nautical tourism. In the case of the yachtsmen, the item ¨ideal destination for sailing¨ was added to a separate sheet in the questionnaire; because of this being their main reason behind the trip. For the tourists items concerning the evaluation of this attribute were included in the chartering/boating evaluations. Table 4 shows the results of the data analysis.

The highest mean score within the group of the yachtsmen visiting the Canary Islands was for the attribute "ideal destination for doing water sports". The yachtsmen consider that the Canary Islands offer a more positive image as a nautical destination for doing water sports than Agadir. In second place, were the attributes "ideal destination for sailing" and "for sport fishing", with "positive image". The majority of the attributes evaluated by the yachtsmen for the Canary Islands received higher values compared to Agadir, except for the "accessibility", "safety" and "skiing activities" variables. These three attributes are seen by the yachtsmen visiting Agadir as generating a more positive image of the destination. It should be highlighted that that the "safety" variable was also one of the best-rated attributes for the ports and marinas in Agadir. Even when the accessibility is not considered an optimum attribute of the Moroccan ports, the accessibility to the destination is. On the contrary, the accessibility attribute of the Canarian ports was a high-evaluated item by the yachtsmen, but for the destination in general, the perceived image receives lower rates than Agadir. Personal interviews reveal that the yachtsmen's perceptions concerning accessibility are that the air and maritime connections with the archipelago are limited and also expensive.

Table 4: **Descriptive analysis of the attributes of the destination image for nautical tourism**

Sub-segments	Yachtsmen				Tourists			
Destinations	Canary Islands		Agadir		Canary Island		Agadir	
Attributes*	*Mean*	*SD*	*Mean*	*SD*	*Mean*	*SD*	*Mean*	*SD*
Destination with nice weather	3.83	.88	3.50	.83	4.60	1.00	3.60	1.00
A destination with easy access	3.50	.95	3.97	.88	4.00	.72	3.74	.91
A destination offering a high level of safety	3.69	.92	3.94	.84	4.00	.90	3.94	.90
A destination with a healthy and unpolluted environment	3.83	.88	3.69	.83	3.80	1.00	3.83	1.00
Destination offering a diversity of sport, tourist and recreational activities	3.82	.83	3.73	.88	4.00	1.01	3.43	.90
Ideal destination for doing water sports	4.12	.88	3.84	1.00	3.97	.91	3.68	.85
Ideal destination for sailing	4.10	.84	3.40	.96		.89		.86
Ideal destination for scuba diving	3.90	.99	2.83	1.00	3.80	1.02	3.10	.87
Ideal destination for surfing/windsurfing	3.79	1.20	3.46	.96	4.20	.92	3.50	.88
Ideal destination for skiing activities	3.60	1.20	3.85	.92	3.60	1.02	3.20	.85
Ideal destination for kayaking and canoeing	3.88	1.10	3.76	.88	3.20	1.03	3.20	.90
Ideal destination for chartering/boating	3.81	1.10	3.76	.84	3.70	.93	2.80	.85
Ideal destination for sport fishing	4.01	1.00	4.00	.83	4.10	1.03	3.10	.92

* All attributes were measured on a Likert-type scale (1 = very negative and 5 = very positive image). SD-Standard Deviations

Source: Prepared by the authors

It can be also assumed that the yachtsmen perceive Agadir as a nautical destination that is more suited to skiing activities than the Canary Islands are. However, bearing in mind the conditions that Agadir offers for doing water sports, the yachtsmen almost always believe that the destination has a lower positive image than the Canary Islands. They stated that there is a general lack of quality and that the Moroccan nautical companies offering the services were emerging and improvised.

With regards the tourists we can conclude that the climate is the attribute that generates the most positive image for the Canary Islands, followed by the attributes related to conditions for surfing/windsurfing, sport fishing, “accessibility” and “safety”. However, for the tourists visiting Agadir, “safety” and “accessibility”, are the best-valued attributes for the destination. The yachtsmen and tourists visiting Agadir have almost the same perceptions for these aspects. The nautical offer for chartering or renting boats is a below-average attribute according to the tourists visiting Agadir and it is in fact the lowest valued for the whole sample (table 4).

The attribute relating to the climate in Agadir had a lower score on average that the same attribute for the Canary Islands, even when it is known that in general terms, the meteorological conditions are very similar for both regions. The interviews revealed that the difference perceived is owing to the conception that ideal meteorological conditions for the tourists are focussed on the conditions of the water for water sports, and that the perception of "ideal" is very different between a nautical tourist who wants to sail and a nautical tourist pursuing other water sports. Furthermore, each nautical sport requires different climatological conditions. As far as Agadir is concerned, the nautical tourists state that the conditions of its waters are not suitable for all year round use, at least not for certain sports, but that in the summer months however, the waters were ideal. The yachtsmen stated that for sailing, the Moroccan coasts posed certain difficulties when compared with the Canary Islands, but that the climate was indeed favourable for sailing all year round. As regards the Canary Islands, the climate favours nautical tourism in general all year round (table 4).

It is important to note how the destination's image attributes were not given the maximum rate in any case. Here we could conclude that on the contrary to the results given to the image of the ports and marinas, as far as the attributes regarding the image of the destination were concerned, the tourists often gave lower values than the yachtsmen, mainly for the attributes relating to the activities and nautical services (sports). These values may be related to the fact that they use these activities and services more extensively than the yachtsmen.

The mean scores of the affective image are shown in table 5. The Canary Islands, for the yachtsmen and tourists, are mainly characterised with similar adjectives, such as "healthy, happy, exciting" and "happy, healthy and dynamic" respectively. Agadir is seen mainly as an "exciting, dynamic and happy¨ destination by the yachtsmen, and as a ¨genuine, exciting and dynamic" destination by the tourists. The affective image of the nautical tourists visiting the Canary Islands is generally rated more positively in relation to the tourists' evaluations of Agadir.

Table 5: **Descriptive analysis of the affective image of the nautical destinations**

Items*	**Canary Islands**				**Agadir**			
	Yachtsmen		Tourists		Yachtsmen		Tourists	
	Mean	*SD*	*Mean*	*SD*	*Mean*	*SD*	*Mean*	*SD*
Gloomy- Exciting destination	4.02	1.10	3.98	.97	3.87	.70	4.20	.84
Synthetic - Genuine destination	3.99	.96	3.82	.98	3.13	.70	4.30	.84
Unsustainable - Sustainable destination	3.83	.99	3.79	.88	2.98	.92	3.20	.86
Quite-Dynamic destination	3.80	1.10	4.08	.84	3.87	1.00	3.80	.98
Unhappy -Happy destination	4.09	1.10	4.32	.84	3.81	.72	3.90	.97
Unhealthy- Healthy destination	4.24	.84	4.17	.86	2.98	1.20	3.10	.88

*All items were measured on a five-point semantic scale. SD- Standard Deviations

Source: Prepared by the authors

Another aspect evaluated at this stage was the overall image of the destinations and the behavioural intentions of the nautical tourists to recommend the destinations (table 6). Firstly, all the nautical tourists rated the Canary Islands with a ¨Positive Image¨. Secondly, 81.9 % of the yachtsmen and 97.5% of the sample of tourists would recommend the islands to friends and family. The yachtsmen in the archipelago rated the overall destination's image as lower than the tourists. This was the same for their intentions to recommend which are less frequent within the sample of the yachtsmen visiting the Canary Islands. The perceived overall image of the Canary Islands is superior to the Agadir, according to the nautical tourists visiting both regions at the same time.

Table 6: **Overall destination image and behavioural intentions ***

Items	Sub-segments		**Canary Islands**	**Agadir**
Overall destination image	Yachtsmen		4.12 (.91)	3.52 (.70)
	Tourists		4.15 (.75)	3.64 (.70)
Intention to recommend (%)	Yachtsmen	Yes	81.90	87.50
		No	18.10	12.50
	Tourists	Yes	97.50	87.50
		No	2.50	12.50
First visit (%)	Yachtsmen	Yes	1.00	71.90
		No	99.00	28.10
	Tourists	Yes	38,60	39.10
		No	61.40	61.00

*Overall image (Means - Likert-type scale 1 = very negative and 5 = very positive image); (SD) Standard Deviation; Intention to Recommend and First Visit (Frequency analysis)

Source: Prepared by the authors

As far as Agadir was concerned, besides the fact that the overall image mean scores are lower than 4 for both the yachtsmen and the tourists, more than 87% of the tourists within the sample do have the intention to recommend the destination. Furthermore, in this case, the intentions of recommending the destination have the same frequency of positive responses for both groups. It can also be seen that generally the intentions of the yachtsmen and the tourists for recommending both destinations are high.

As far as the Canary Islands are concerned, 38.6% of the tourists were visiting for the first time, and 99% of the yachtsmen had already visited the islands on a previous occasion. For Agadir, the number of yachtsmen (71.9%) staying for the first time was much higher than in the Canary Islands, Similarly for the tourists visiting Agadir, 39% were doing so for the first time. As a conclusion we can perceive that the yachtsmen visiting the Canary Islands are more loyal tourists than the tourists. This is the contrary for the sample of tourists visiting Morocco, where there are more loyal visitors within the tourists. Neither destination received the maximum points for any of the attributes which implies that neither have a "very positive" image.

CONCLUSIONS AND RECOMENDATIONS

The study of preferences of the nautical tourists has provided us with significant conclusions regarding the similarities in profile for both groups. As far as planning the trip is concerned, there is a clear segmentation between the preferences of the yachtsmen and the rest of nautical tourists regardless of the destination they are travelling to. 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 doing sports related to active tourism, and the sea.

In the research carried out, it has been seen that the perceptions and evaluations of the nautical tourists vary based on the type of activity that they are going to do at the destination with clear profiles between a nautical tourist that sails and a nautical tourist that pursues recreational activities.

Regarding the ports and marinas at the Canary Islands (Spain) and the Souss Massa Drâa Region (Morocco), they do not currently generate an optimum image for the nautical tourists. The “services on offer” was the attribute with the lowest mean scores of the entire sample. The yachtsmen clearly use the ports more extensively than the tourists given that generally they stay there most of the time and receive certain services that are offered to them. The evaluations of image given by the yachtsmen were indeed less positive than those of the tourists, seemingly because they are less satisfied with some specific basic services offered at the ports for boat users. Agadir, however, considered an emerging destination with poorer infrastructures and products and services on offer in comparison to the Canarian ports, received very near rates of image, according to the tourists and yachtsmen that have visited it. This indicates that the nautical tourism ports in Agadir offer, as far as the tourist perceives, similar conditions to the Canarian ports. For the case of the group of tourists, the rest of the attributes of the ports and marinas such as “situation and accessibility”, “security” and “environmental management”, were evaluated from other perspectives that arose from the short interviews carried out. Their perception of the image of the ports was also higher than that of the yachtsmen.

It is clear that there are weaknesses in the services offered at the ports and this should be assessed further in order to better position both destinations as top quality spots for nautical tourism. In the same way, the consolidation of both destinations for nautical tourism will depend also on the attention given to the port services and the mix of nautical tourist services offered at them. It is important to improve the Marinas, the services offered there and redesign and define the range of services and products offered to the tourist in order to satisfy the target market better. Security is seen as a positive attribute at Agadir.

As regards the use of the services offered for nautical tourism it can be seen that the tourists make more use of these services than the yachtsmen as they carry out more water sports. This means also that they have greater knowledge of the water sports offered and the conditions of the destination in general. Along the same lines, the image perceived of the attributes of the destination tends to be lower valued by the tourists than by the yachtsmen particularly in relation to the offer of water sports.

As a conclusion the Canary Islands, as a nautical destination, have a positive image, according to the nautical tourists that visited at the time of the research. However, it should be taken into account that the destination did not receive the highest evaluations for any of its attributes, which means that the destination market expectations have not been fully met. The perceived overall image of Morocco did not reach the ¨positive image¨ score for either the yachtsmen or the tourists. However, the analysis separated by attributes shows that Agadir obtains a better image than that of the islands with regards security and accessibility.

The positioning strategies for the Canary Islands as a nautical destination should value the attributes that generate a more positive image for the destination, as well as improving and repositioning the rest of the attributes that were valued with low scores by the groups. The conditions for sailing and doing watersports are in general the strengths the Canary Islands have. The connections by air and sea require special attention. The current offer of packages and services for nautical tourists regarding sport fishing should be better marketed in order to attract more loyal clients and obtain new market share. Exactly the same happens with Morocco; the tourists that have visited perceive the destination as being safe (opposite to common belief) and its ports and marines are also perceived as being safe. Current and future strategies should be focussed on highlighting these attributes, as well as redesigning the range of services offered by the nautical and tourist companies.

Finally, the geographical proximity between Morocco and the Canary Islands, their complementary strategic position in the pathway from mainland Europe to America, their natural and similar conditions (climate and waters), the recent and dynamic evolution in the Moroccan tourism sector, and the commercial and political understanding between these regions, constitute opportunities for the joint development of the nautical sector. By understanding the perceptions and opinions of those nautical tourists that have visited both regions, and determining the most common preferences of the different sub-segments, it is easier to develop more effective strategies to increase satisfaction and image perceived, and to gain a more loyal group of European nautical visitors. The yachtsmen's preferences for organised crossings allows for the design of innovative products, such as crossing the Mediterranean to the Atlantic. The fact that there are some difficulties in Moroccan waters for navigation could also lead to the creation of professional circuits and competitions. The generation of joint products should be developed after carrying out a suitable market segmentation; yachtsmen, tourists that currently do water sports, and tourists with a tendency to do nautical activities, etc. The segments seem very similar but are in fact quite different types of tourists.

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