

Tourist Ports and Yachting: The Case of Sardinia

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Keywords: Nautical tourism, tourist ports, survey, data-analysis, Sardinia-Italy.

1. INTRODUCTION

Marinas constitute a necessary condition for the creation and development of nautical tourism, which actually sits alongside several other leisure and sport activities related to the sea. A further development of this sector may be sought precisely in a form of standardization and packaging of nautical tourism products. The practice of the charter and of yacht rental clearly aims to such a goal and can open up new markets.

In order to understand nautical tourism it is necessary to investigate and outline the boater's behaviour, preferences, habits at sea and on land. In most cases, the need emerges of empirical investigations on the field, that must be interpreted within the specific context (Jovanovic, T. et al, 2013). This is the case of nautical tourism in the islands, which has both the general characteristics of the segment and the particularities linked to the geographical location of the island considered.

The ports are a highly strategic intersection in the chain and represent the land-water interface. They are structured in different ways, starting from the more structured marinas to the most essential functions provided by simple slides to the sea. Moreover, the ports are not all functionally identical and have three main features: "garage-port" , "square on the sea" and the marinas, or "nautical villages".

1 The general outline of this work and paragraph 2 are the result of collaboration between the authors. Paragraphs 1 and 4 are by Gian Marco Ugolini; paragraphs 3 and 5 are by Enrico Ivaldi.



2. OBJECTIVES AND METHODOLOGY

The aim of this study is to analyse the present situation of one of the largest islands in the Mediterranean in relation to the offer of marinas and what is its degree of openness to the inflow from other "continental territories".

The structure of port supply is analysed through a detailed processing of existing databases. The characteristics of the yachting activity in Sardinia are analysed in 2014 through an original research carried out by the authors as part of their scientific direction of the National Nautical Observatory and of their statistical data analyses, through a proprietary database query related to a panel of 1,204 Italian and foreigners boaters.

This survey consisted first of all in the creation of a structured questionnaire for the two categories of stakeholders analysed: the boaters and the port authorities. The boaters were mainly asked about the modalities and motivations linked to their choice of using Sardinian ports. Authorities were asked about the number of berths and the modes of use by the boaters, crossing the data emerged with those indicated by the boat owners. This, among other things, allowed for the first time to have a complete picture of the flows through a matrix that relates the origin / residence of boaters and the region of the home port.

3. RESULTS

In Italy the distribution of ports structure and berths is partly different (Table 1).

Table 1. Ports and berths by macro-area.

Regions/Macro Regions	PORTS				BERTHS			
	N° infrastr.	Marinas	Poly-functional ports	Moorings	N° infrastr.	Marinas	Poly-functional ports	Moorings
Liguria	56	12	38	6	22,994	6,963	15,674	357
Tuscany	43	6	31	6	18,645	3,647	13,562	1,436
Sardinia	80	12	41	27	19,872	5,250	11,411	3,211
Upper Tyrrhenian	179	30	110	39	61,511	15,860	40,647	5,004
Lazio	30	3	27	0	8,681	2,978	5,703	
Campania	51	5	34	12	13,055	2,893	8,831	1,331
Central Tyrrhenian	81	8	61	12	21,736	5,871	14,534	1,331
Basilicata	3	2	1	0	1,900	1,300	600	
Calabria	17	1	9	7	4,779	205	3,427	1,147
Sicily	89	4	47	38	18,099	2,710	10,543	4,846
Puglia	48	3	38	7	10,823	1,648	8,147	1,028
Molise	3	1	2	0	710	420	290	
Abruzzo	8	1	7	0	2,534	1,250	1,284	
South	168	12	104	52	38,845	7,533	24,291	7,021
Marche	12	3	9	0	6,027	2,210	3,817	
Emilia Romagna	24	8	14	2	6,056	3,512	1,796	748



Veneto	48	7	33	8	12,562	3,031	6,811	2,720
Friuli V.G.	42	10	23	9	13,831	4,801	7,533	1,497
Upper Adriatico	126	28	79	19	38,476	13,554	19,957	4,965
Total Italy	554	78	354	122	160,568	42,818	99,429	18,321

Source: our elaboration from Osservatorio Nautico Nazionale (2013).

In Sardinia, the distribution of ports is intimately linked to the diversity of coasts in the four provincial groupings (Table 2 and Figure 1).

Table 2. Breakdown of Sardinian port structures within the geographical groupings.

Geographical grouping	Marinas		Poly-functional ports		Moorings		Total	
	a.v.	%	a.v.	%	a.v.	%	a.v.	%
North	10	83.3	18	43.9	21	77.8	49	61.3
West	-	-	4	9.8	-	-	4	5.0
East	-	-	4	9.8	1	3.7	5	6.3
South	2	16.7	15	36.6	5	18.5	22	27.5
Sardinia	12	100.0	41	100.0	27	100.0	80	100.0

Source: Our elaboration from Osservatorio Nautico Nazionale (2013).

Figure 1. The division by province and the four regional groupings.



Source: Our elaboration.

Revista de Estudios Andaluces, vol. 34, núm. 1 (2017) pp.429-452. e-ISSN: 2340-2776
<http://dx.doi.org/10.12795/rea.2017.i34.15>



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The same analysis carried from the geographical point of view shows a homogeneous framework to that of the structures analysed above (Table 3).

Table 3. The distribution of berths (absolute and % value) and average number of berths in the Sardinian port facilities, by geographical groupings.

Port facilities		North	West	East	South	Sardinia
Geographical groupings						
Tourist ports (Marinas)	n. of berths	4,000			1,250	5,250
	%	76.2	-	-	23.8	100.0
	Average n. of berths	400			625	438
Poly-functional ports	n. of berths	5,698	1,204	1,080	3,429	11,411
	%	49.9	10.6	9.5	30.0	100.0
	Average n. of berths	317	301	270	229	278
Mooring	n. of berths	2,104		400	707	3,211
	%	65.5	-	12.5	22.0	100.0
	Average n. of berths	100		400	141	119
Total	n. of berths	11,802	1,204	1,480	5,386	19,872
	%	59.4	6.1	7.4	27.1	100.0
	Average n. of berths	241	301	296	245	248

Source: Our elaboration from Osservatorio Nautico Nazionale (2013).

With a detailed knowledge of the situation in Sardinia, it is possible to compare it to that of its boating basin (Upper Tyrrhenian) and of Italy (Table 4).

Table 4: Geographical distribution of ports (Sardinia, Upper Tyrrhenian, Italy).

Types of ports		Sardinia	Upper Tyrrhenian	Italy
Tourist ports (Marinas)	a.v.	12	30	78
	%	15.0	16.7	14.1
Poly-functional ports	a.v.	41	111	354
	%	51.3	61.7	63.9
Mooring	a.v.	27	39	122
	%	33.8	21.7	22.0
Total	a.v.	80	180	554
	%	100.0	100.0	100.0

Source: our elaboration from Osservatorio Nautico Nazionale (2013).

Table 5 shows the geographical distribution of berths by types of ports.

Table 5: Geographical distribution of the berths (Sardinia, Upper Tyrrhenian, Italy).

Berths		Sardinia	Upper Tyrrhenian	Italy
Tourist ports (Marinas)	a.v.	5,250	15,860	41,776
	%	26.4	26.6	26.7
Poly-functional ports	a.v.	11,473	38,765	97,054
	%	57.6	65.1	62.0
Mooring	a.v.	3,194	4,897	17,776
	%	16.0	8.2	11.4
Total	a.v.	19,917	59,522	156,606
	%	100.0	100.0	100.0

Source: our elaboration from Osservatorio Nautico Nazionale (2013).



Table 6 shows the distribution of berths for permanent mooring and daily transit, by length.

Table 6. Geographical distribution of berths (Sardinia, Upper Tyrrhenian, Italy) for permanent mooring and daily transit, by length.

Length berths		Sardinia	Upper Tyrrhenian	Italy
< 10 m	berths for permanent mooring	59.1%	56.4%	47.8%
	<i>berths for daily transit</i>	38.1%	37.3%	32.7%
10.01 to 12 m	berths for permanent mooring	20.6%	18.0%	25.0%
	<i>berths for daily transit</i>	27.5%	25.2%	27.9%
12.01 to 18 m	berths for permanent mooring	15.8%	19.2%	20.8%
	<i>berths for daily transit</i>	17.6%	20.2%	24.5%
18.01 to 24 m	berths for permanent mooring	3.4%	4.7%	4.9%
	<i>berths for daily transit</i>	9.8%	10.2%	9.3%
> 24.01 m	berths for permanent mooring	1.1%	1.8%	1.5%
	<i>berths for daily transit</i>	7.0%	7.1%	5.6%

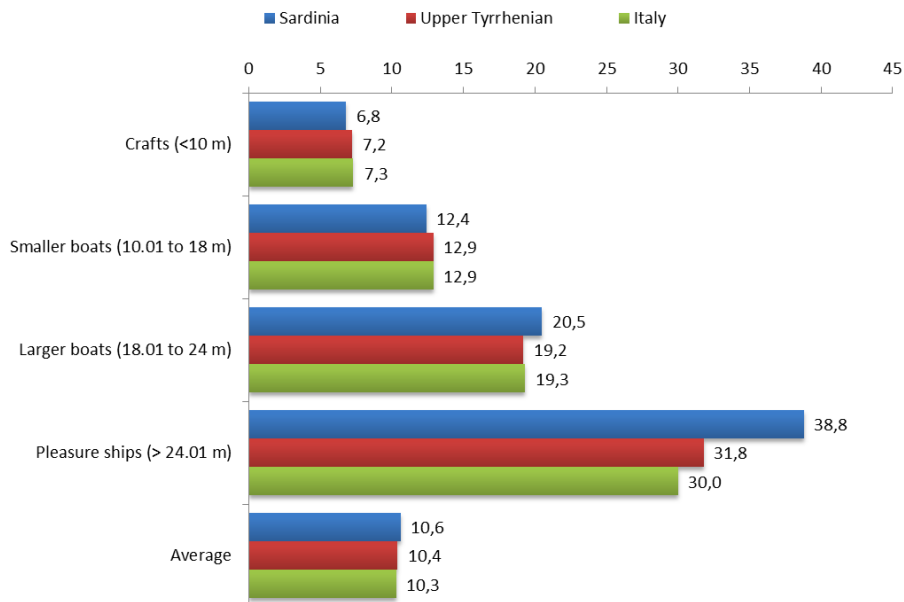
Source: our elaboration from Osservatorio Nautico Nazionale (2013).

4. DISCUSSION

It is useful to focus on the comparison of the data that explicitly concern the boat used and the phase of navigation.

In Figure 2 we can find some information about the size of recreational crafts.

Figure 2: Average length in meters of different types of boats.



Source: Our elaboration.

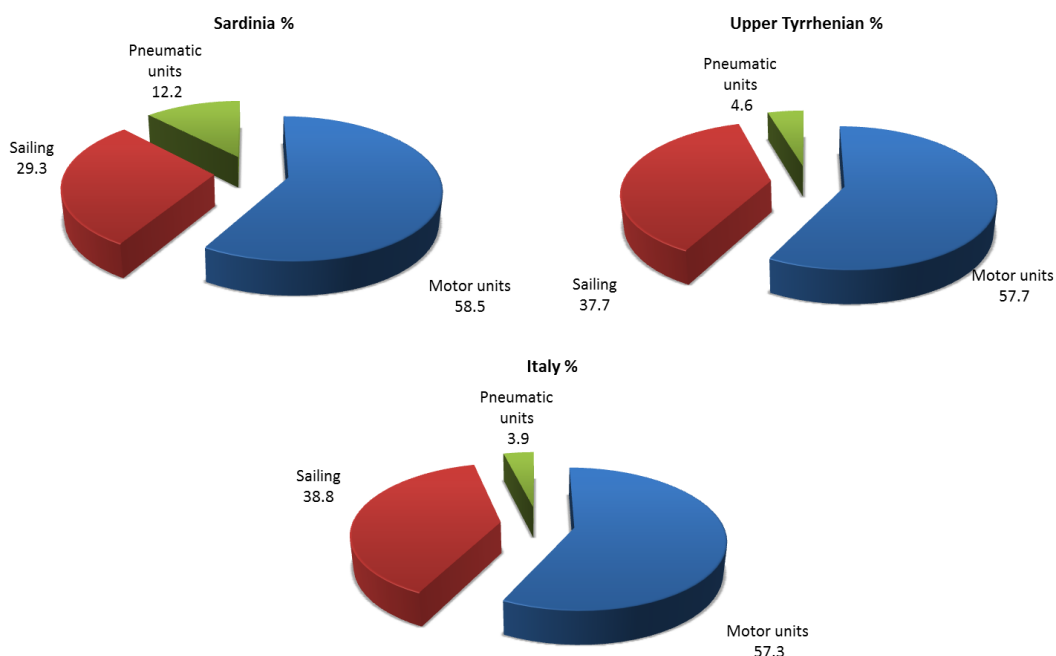
Revista de Estudios Andaluces, vol. 34, núm. 1 (2017) pp.429-452. e-ISSN: 2340-2776
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A rather significant difference is revealed by segmenting the pleasure crafts based on propulsion and type: motor units, sailing or pneumatic units (Figure 3).

Figure 3: Propulsion.



Source: Our elaboration.

When analysing the profile of those who sail along the coast of Sardinia, both those who keep their home port within the region and those in transit, it can be observed that the share of foreign boaters, almost 11%, is significantly higher than that recorded in the Upper Tyrrhenian (4.9%) and than the national average, 4%.

Table 9 examined the flow of boaters in transit by origin; while Figure 4 shows the origin of boaters with home port in Sardinia.

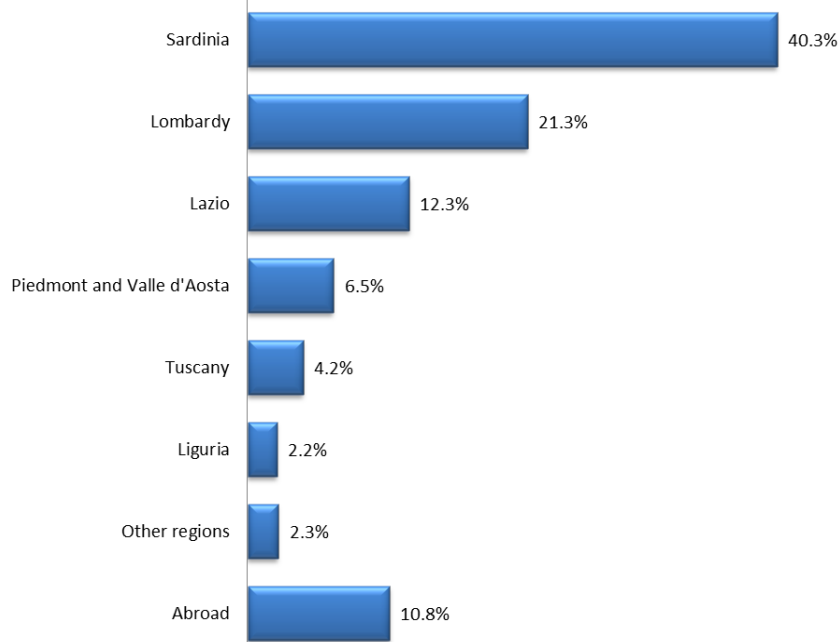
Table 9: Geographical distribution of boaters in transit by origin.

	Sardinia			Upper Tyrrhenian			Italy		
	Italy	EU	Non-EU	Italy	EU	Non-EU	Italy	EU	Non-EU
Crafts	80.0%	20.0%	-	90.0%	10.0%		71.9%	21.1%	7.0%
Smaller boats	36.3%	45.5%	18.2%	79.2%	16.7%	4.1%	61.0%	32.5%	6.5%
Larger boats	28.6%	49.7%	21.7%	70.0%	19.0%	11.0%	52.0%	35.8%	12.2%

Source: Our elaboration.



Figure 4. Origin of boaters with home port in Sardinia.



Source: Our elaboration.

5. CONCLUSIONS

The Italian situation, within which Sardinia is to be located, presents a very broad and diffuse offer of ports at the regional level. Sardinia occupies a pre-eminent position in its area, the basin of the Upper Tyrrhenian, and also at the national level.

The peculiar geographical distribution of port facilities looks rather unbalanced. There are several explanations for this: an irregular coastline, with coves and inlets that favour the presence of ports; the beauty of the coast and waters, that greatly attracts the boaters; the direct access to Liguria (and, through it, to all the rich north-west of Italy), to Tuscany and to the French Riviera.

Nautical tourism in Sardinia has particular characteristics: the demand is characterised by a significant share of foreign boaters, both resident and in transit, and by the presence of an above average number of large yachts, which are the richest segment of nautical tourism today.

The real challenge to develop nautical tourism lies in organizing an offer in the form of real "tourist packages" that include timely information, promotion of natural, monumental, artistic, cultural treasures and of crafts, food and wine, and collective and individual transport. Such a challenge, paradoxically, is played more on solid ground than on the sea itself.

