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RESULTS
QUESTIONNAIRE
REGARDING
SATISFACTION WITH
THE 2024 CHARTER
SEASON



Results of the 2024 Charter Season Satisfaction Survey

This analysis is derived from the findings of an anonymous survey distributed to charter companies throughout Croatia.

The purpose of the questionnaire was to identify significant challenges, priorities, and trends within the nautical charter industry for the 2024 season.

The questionnaire was organized into multiple thematic sections:

Operational challenges: Factors including pricing, competition, and infrastructure.

Priorities and objectives: Expanding the client base, digital transformation, sustainability.

The significance of emerging technologies: Automation, artificial intelligence, analytics.

Promotional strategies: Partnership with influencers, utilization of video content, sustainable branding.

Essential information:

Target audience: Charter companies of varying sizes, ranging from those with fewer than 5 vessels to those with over 100.

Number of responses: A total of 112 responses were collected.

Data collection period: October 29 to November 11, 2024.

These results offer significant insights into the present condition of the industry and assist in formulating strategies to enhance business in the forthcoming seasons.

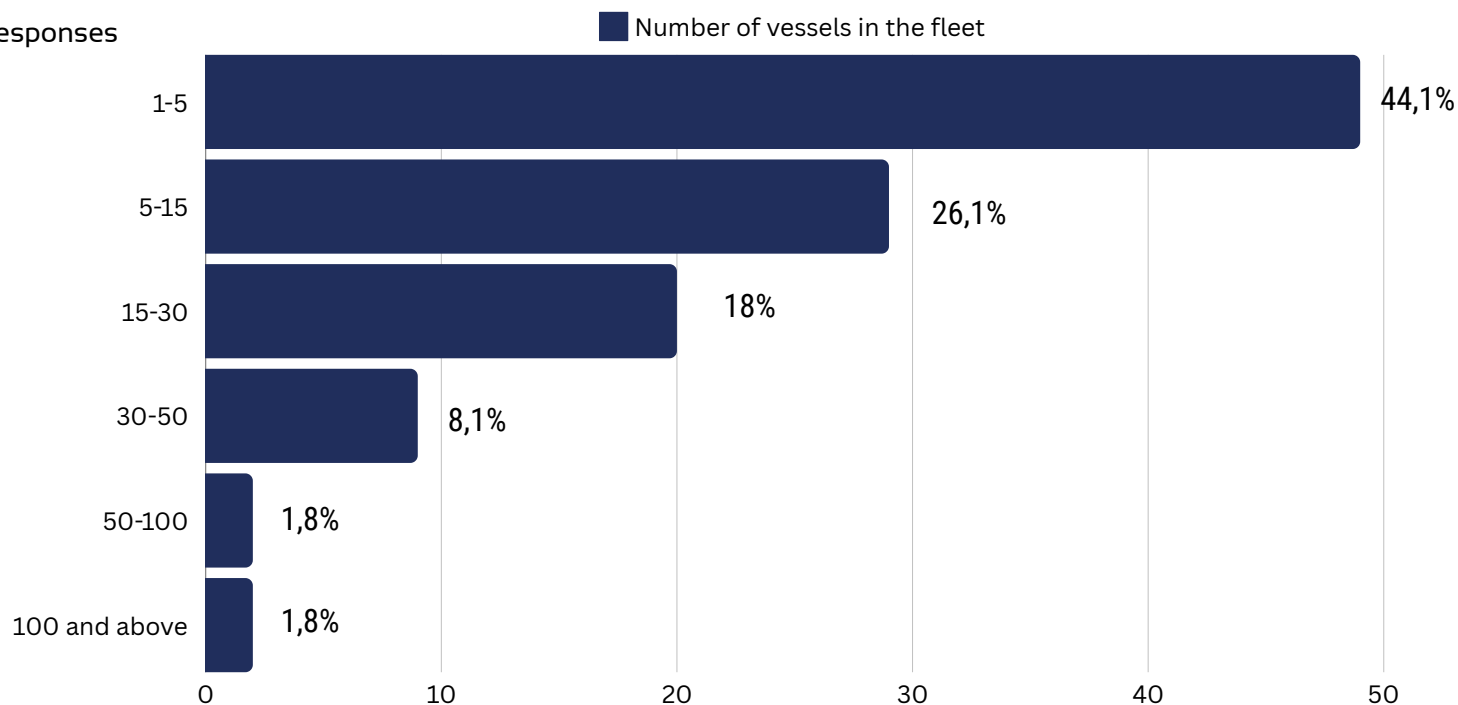


Results of the 2024 Charter Season Satisfaction Survey

Respondent fleet capacity

We currently possess the following quantity of vessels in our charter fleet:

112 responses

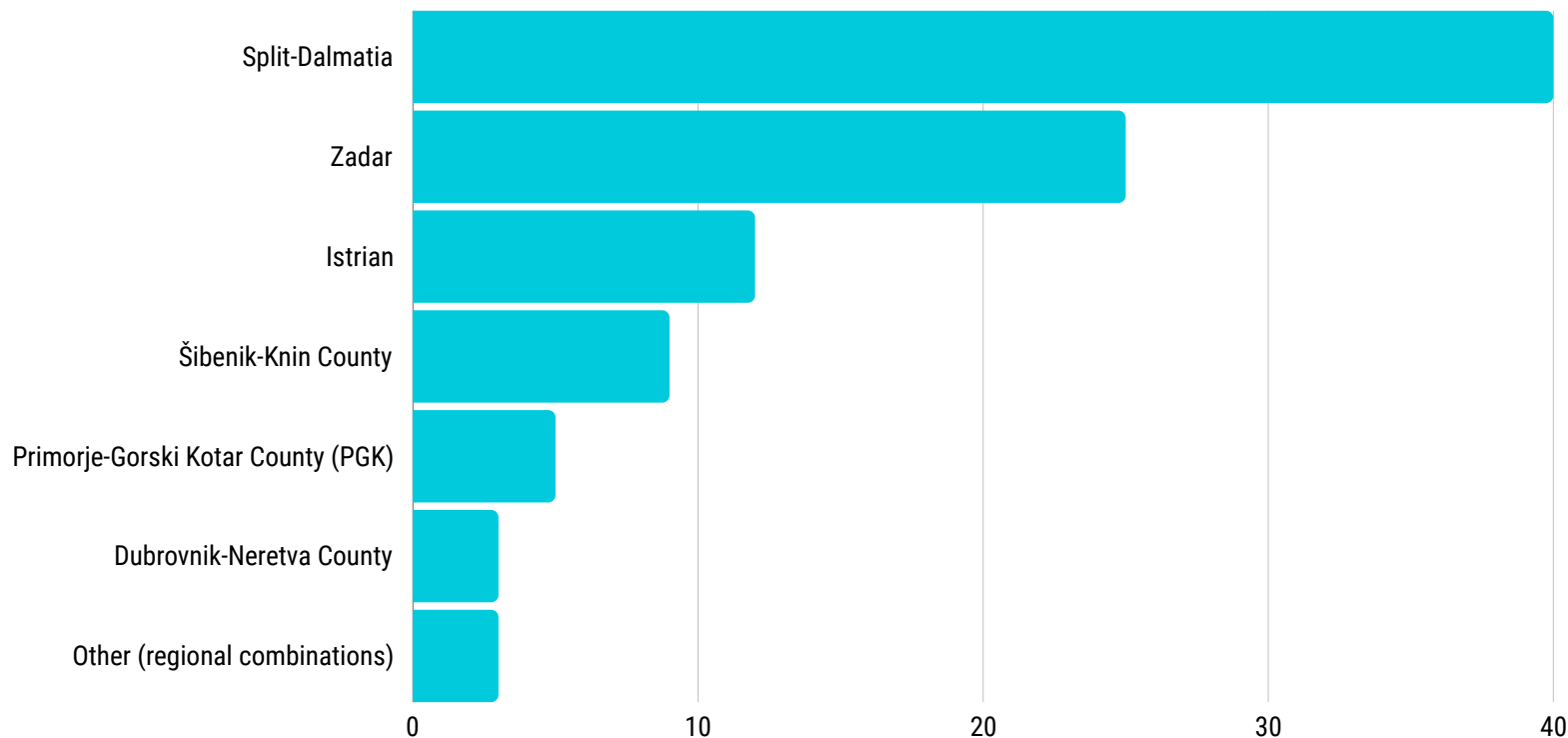


The majority of respondents, 44%, operate small fleets consisting of 1-5 vessels, whereas the least represented group (2%) oversees fleets of 50-100 vessels and those with 100 vessels or more.



Results of the 2024 Charter Season Satisfaction Survey

Location of charter activity



We were interested in the regional distribution of our respondents. The results indicate that the largest proportion comes from the Split and Zadar regions, accounting for 65% of all respondents, while the smallest proportion is from the Dubrovnik region, representing 3%.

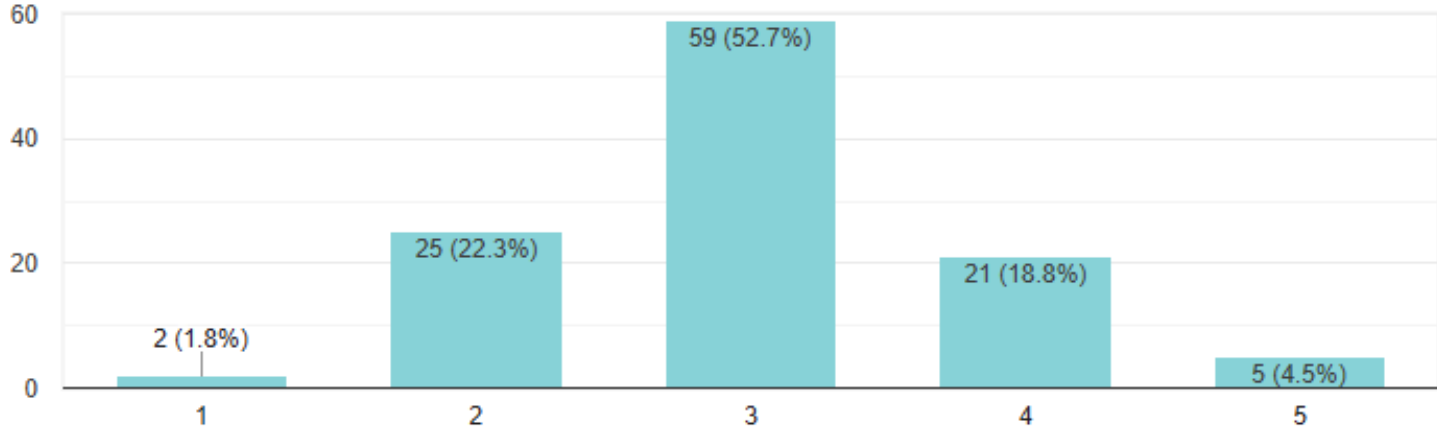


Results of the 2024 Charter Season Satisfaction Survey

Charter Season Rating 2024.

How would you rate charter season on a scale of 1 to 5?

112 responses



Only 2% of charter companies assessed the 2024 season as inadequate, whereas 53% deemed it good, 19% classified it as very good, and 5% considered it excellent.



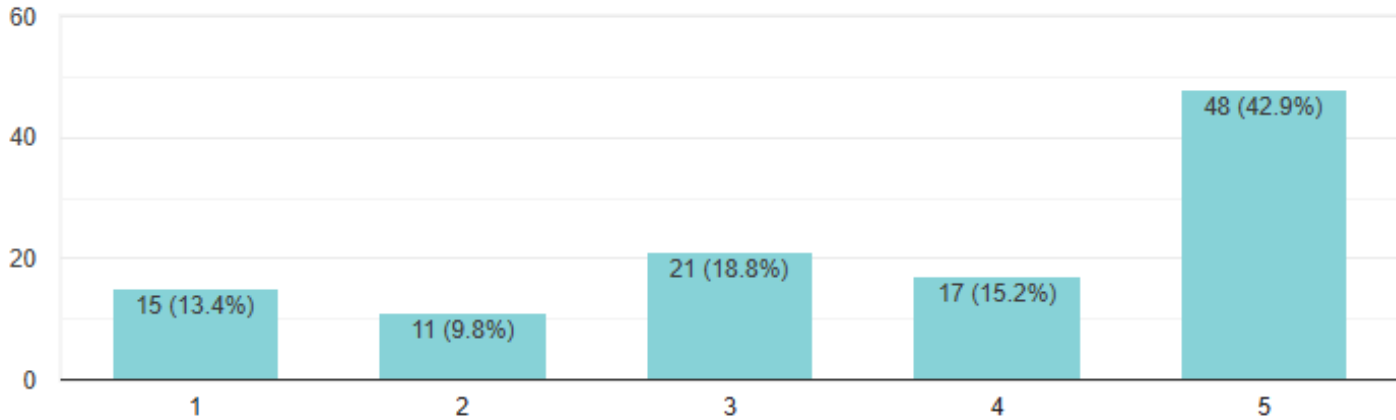
Results of the 2024 Charter Season Satisfaction Survey

Number of charter reservations for 2024.

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

This season, we had fewer reservations compared to last year.

112 responses



The majority of respondents (43%) fully concur that they experienced fewer reservations than in the previous year, whereas a smaller segment (13%) does not share this sentiment. This reflects a notable trend of declining bookings; however, variations among respondents may be associated with fleet size, geographic region, or business strategy.

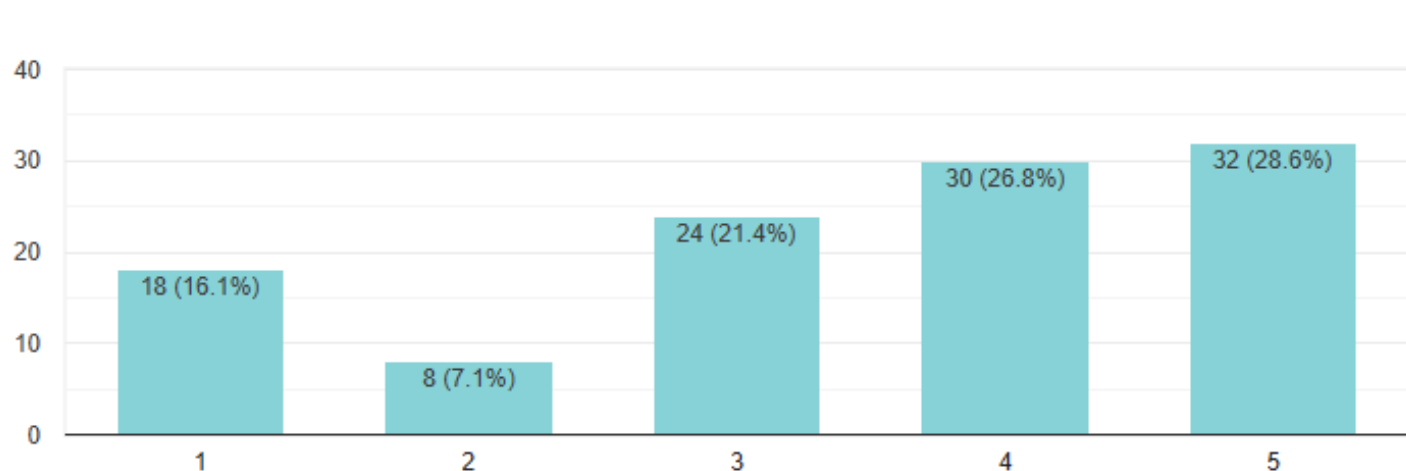


Results of the 2024 Charter Season Satisfaction Survey

Business expenses and the pricing and quality of services

Great operational expenses forced us to increase prices while decreasing the quality of services.

112 responses



A substantial percentage of respondents (29%) fully concur that elevated costs compel price increases and diminish service quality.

Conversely, a smaller percentage (16%) does not perceive costs as the primary cause of the issue. The average score and distribution reflect a pervasive discontent regarding elevated operating costs and their effects on services.



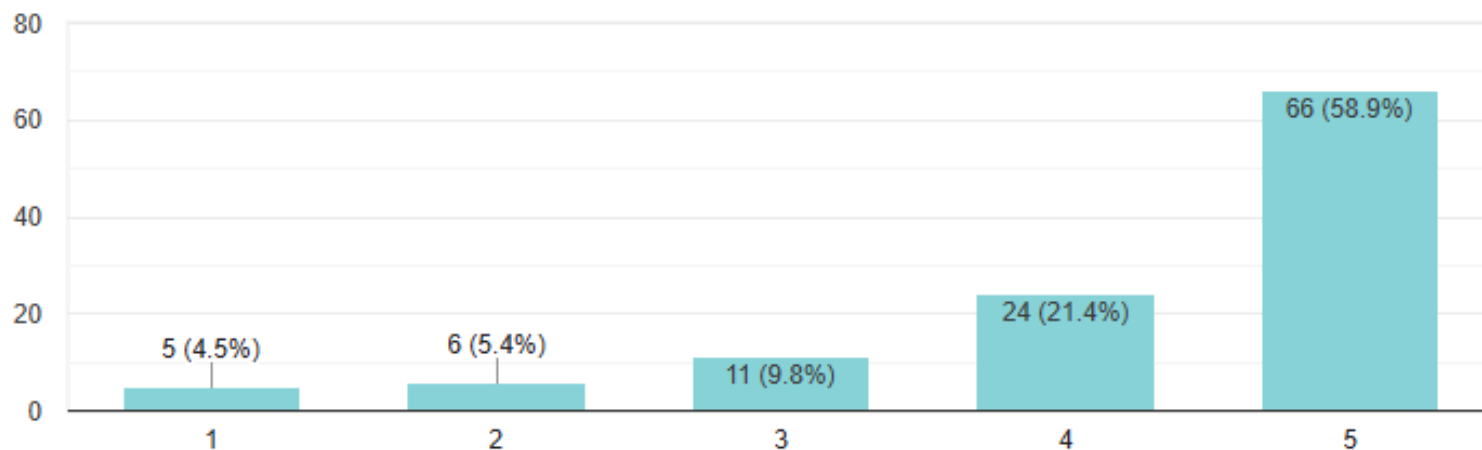
Results of the 2024 Charter Season Satisfaction Survey

Competition and pricing in charter services

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

Competitors with large fleets are dumping prices, and we have to follow them to stay competitive.

112 responses



A significant majority of respondents (59%) fully concur that large fleets and their aggressive pricing strategies compel smaller entities to adjust in order to maintain competitiveness. A mere 10% of respondents disagree or do not perceive this issue as significant. The average rating of 4.54, coupled with the high frequency of 5 ratings, suggests that this issue is perceived as one of the most significant challenges within the industry.



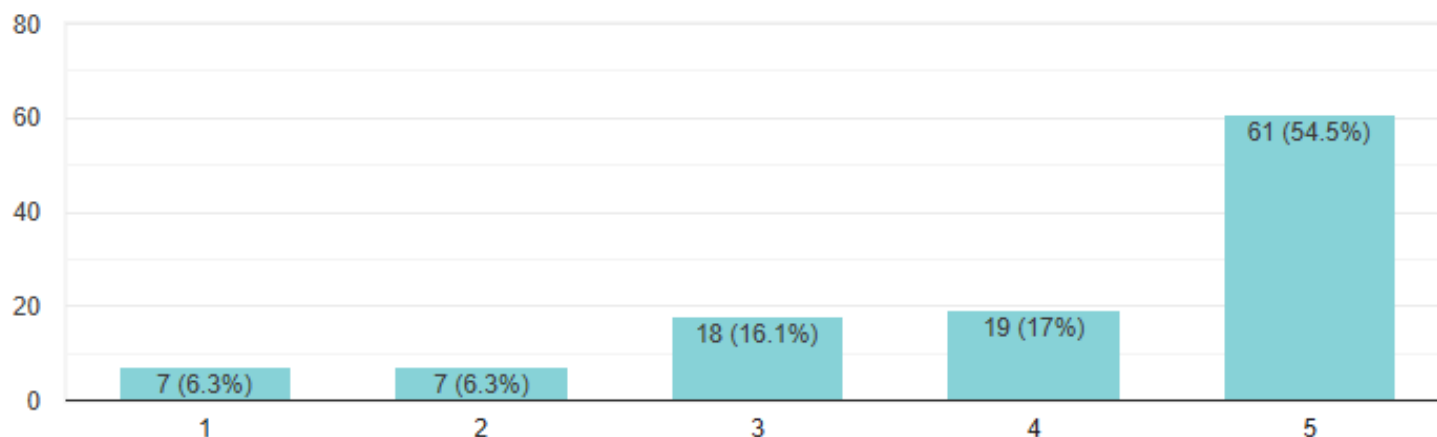
Results of the 2024 Charter Season Satisfaction Survey

The impact of online agencies

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

Big online agencies have a significant influence on dumping prices.

112 responses



The majority of respondents (55%) strongly concur that large online agencies play a substantial role in driving down prices in the market.

Only 6% of respondents express any disagreement with this statement.

The average score of 4.36 underscores respondents' perception of the detrimental influence of these agencies on market conditions.



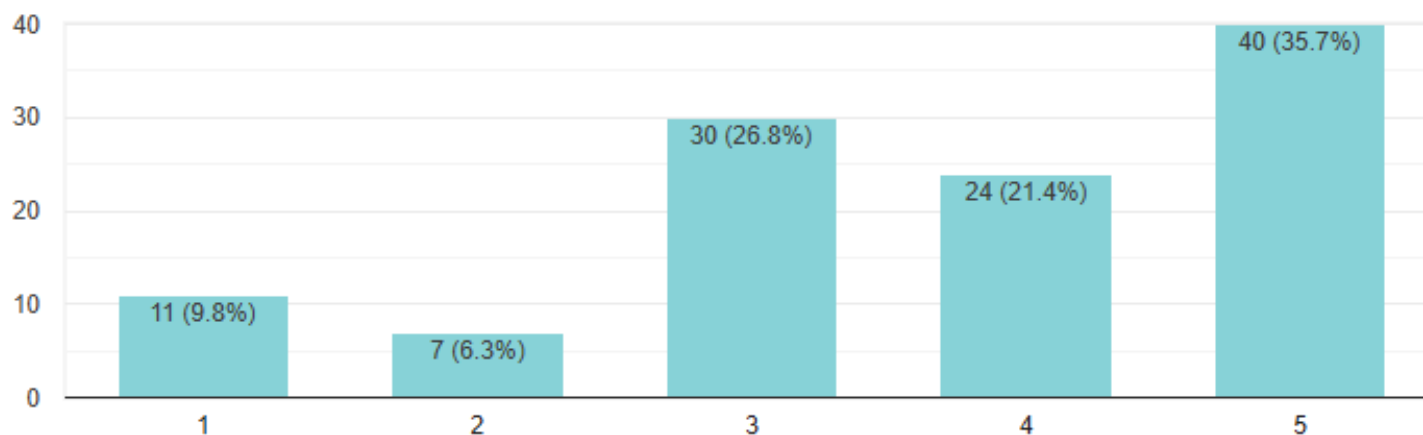
Results of the 2024 Charter Season Satisfaction Survey

Restricting the number of vessels within fleets

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

Restricting the number of vessels within fleets will address the issue of low reservations.

112 responses



The majority of respondents (36%) fully concur that restricting the number of vessels would assist in addressing the issue of insufficient reservations.

Only 10% of respondents express complete disagreement with this statement.

The average rating of 3.81, along with the significant frequency of ratings of 4 and 5, indicates that the concept of limiting the number of vessels is regarded as beneficial, though it is not universally embraced.



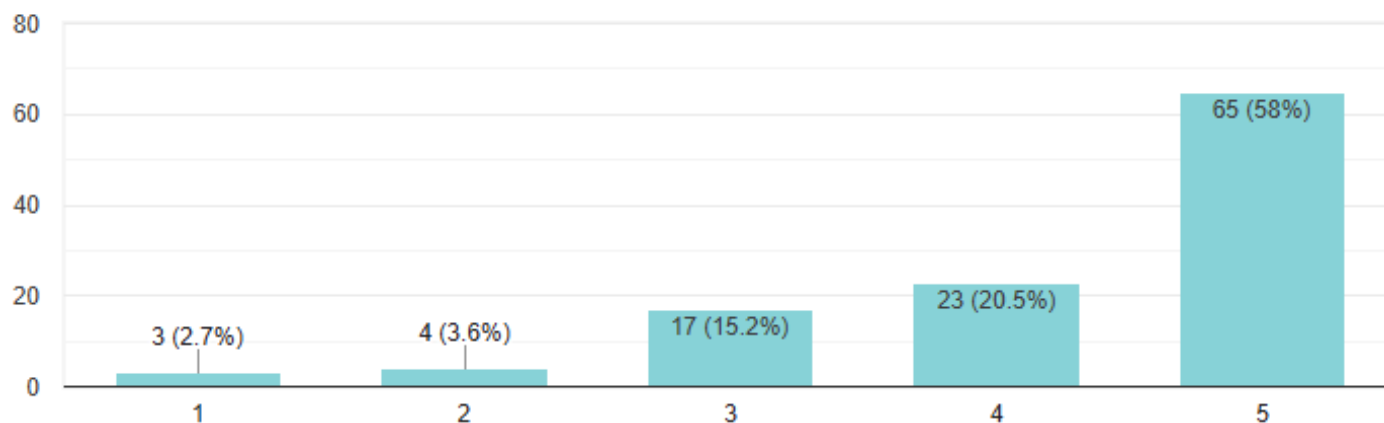
Results of the 2024 Charter Season Satisfaction Survey

Tourism board and promotion of maritime tourism

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

The tourism board promotes nautical tourism in an inadequate manner.

112 responses



More than half of respondents (58%) fully concur that tourist boards insufficiently promote nautical tourism.

A smaller percentage of respondents (7%) disagree with the statement, suggesting a limited number of regions or entities that have a favorable experience with promotion.

The average rating of 4.48, coupled with the high frequency of 5 ratings, suggests that the perception of inadequate promotion is prevalent.



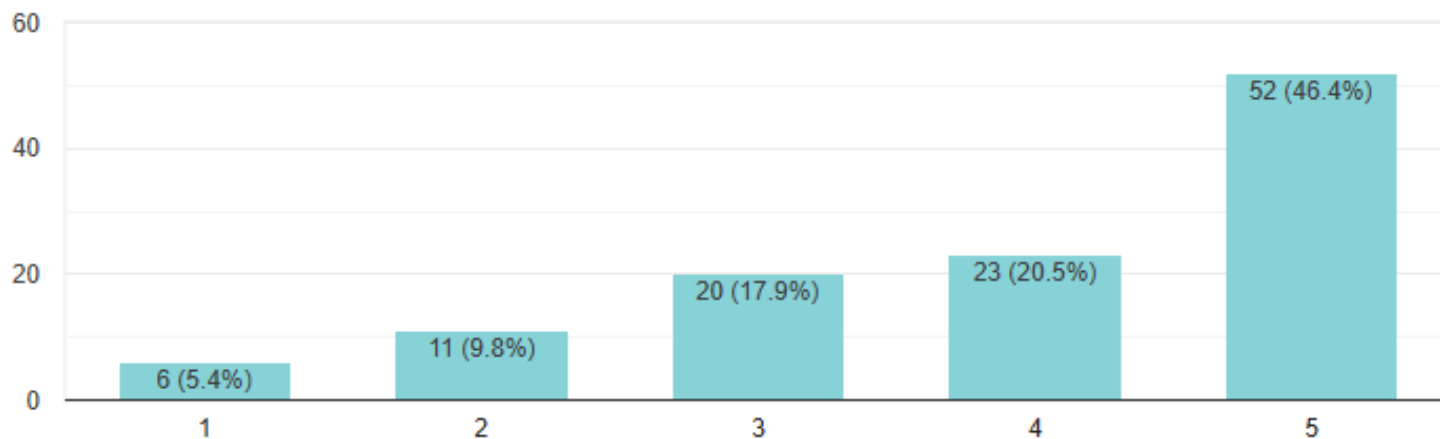
Results of the 2024 Charter Season Satisfaction Survey

Charter promotional initiatives

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

We do not have enough budget for marketing activities.

112 responses



A significant majority of respondents (46%) fully concur that they lack sufficient budget for substantial marketing initiatives.

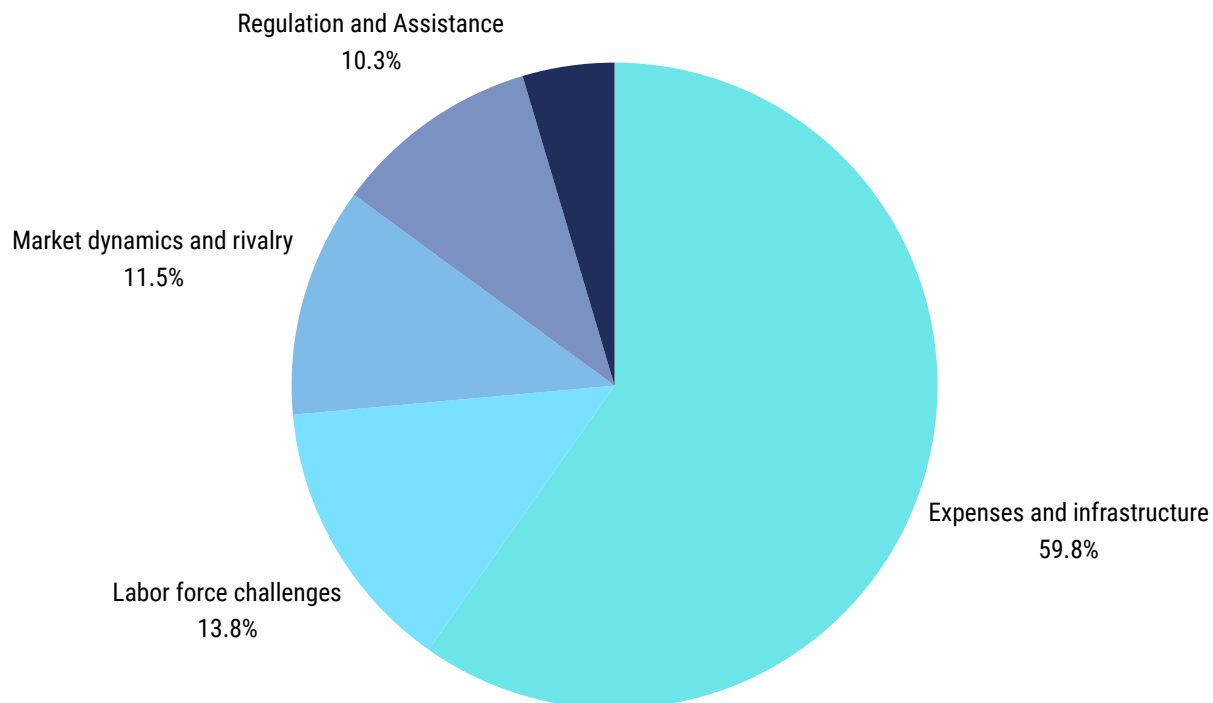
A lesser proportion of respondents (18%) indicated moderate agreement (score 3).

A portion of respondents (15%) entirely disagrees with the statement, suggesting that specific entities may have secured marketing resources.



Results of the 2024 Charter Season Satisfaction Survey

Are there any additional challenges (risks or barriers) that we have not addressed that are particularly relevant to you?



Respondents identified elevated operating costs, inadequate infrastructure, a shortage of skilled labor, and price undercutting as the primary barriers to industry development. Regulatory issues, insufficient backing from tourism boards, and environmental challenges further jeopardize the sustainability and competitiveness of nautical tourism in the Adriatic.



Results of the 2024 Charter Season Satisfaction Survey

Are there any additional challenges (risks or barriers) that we have not addressed that are particularly relevant to you?

Costs and infrastructure (60% of responses) - selected responses include:

Elevated expenses associated with marinas and berths:

"Elevated expenses for moorings in marinas." "Marina prices are rising annually."

Inadequate infrastructure quality:

"Severely inadequate infrastructure in ports." "Costly and insufficient maritime infrastructure."

Unsatisfactory price-to-quality ratio:

"Unjustifiably increasing berth prices in marinas without a corresponding enhancement in service quality." "The costs of marina services do not reflect adequate value for money."

Overall, the open-ended responses underscore the necessity for:

By enhancing infrastructure and minimizing expenses.

By implementing more stringent regulations regarding black chartering and price dumping.

By increasing investments in education and workforce employment.

Increased promotion and support from tourism boards and governmental institutions.



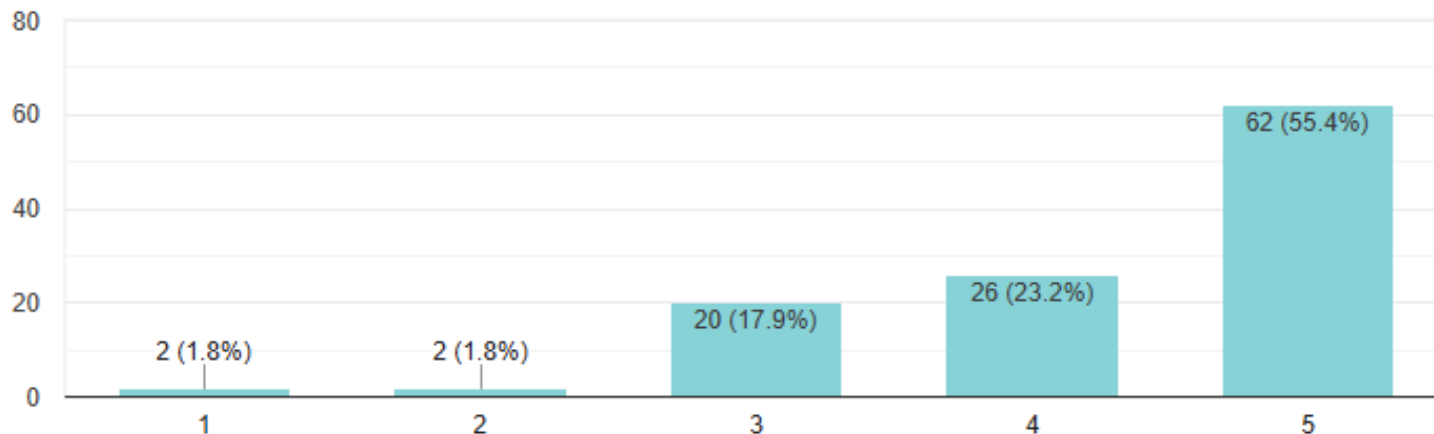
Results of the 2024 Charter Season Satisfaction Survey

Aspirational objectives and advantages

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

We need more clients for our services

112 responses



The overwhelming majority of respondents (55%) fully concur that there is a necessity to augment the number of clients for their services.

Moderate agreement (score 4) was indicated by 23% of respondents.

Only 2% of respondents do not perceive an increase in the number of clients as a necessity, indicating that their capabilities may be adequate or that they were specifically addressing a different issue.



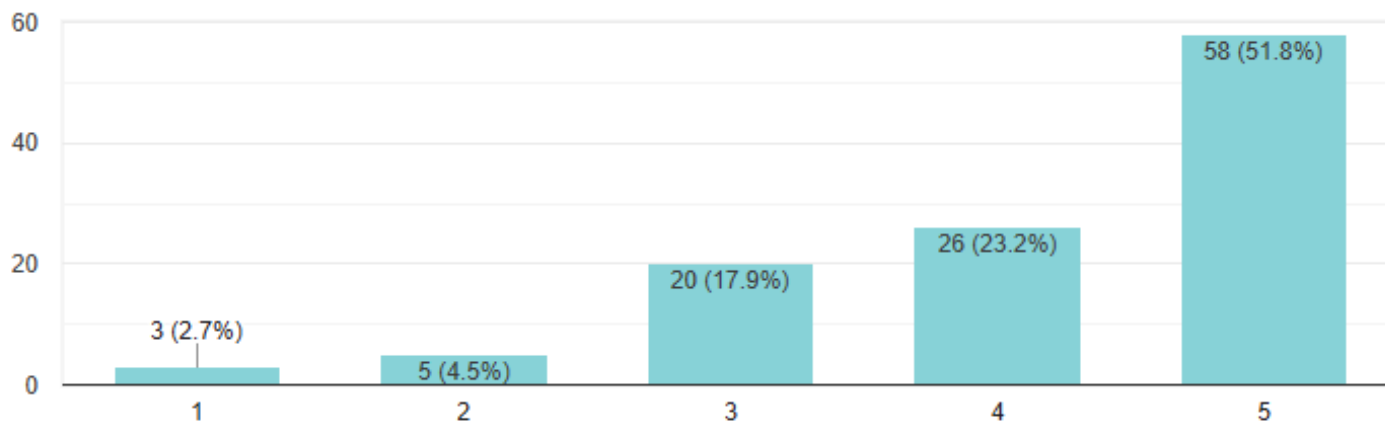
Results of the 2024 Charter Season Satisfaction Survey

How to engage clients?

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

We want clients to find us online and come to us, rather than us searching for them.

112 responses



The overwhelming majority of respondents (52%) fully concur with the statement, while a further 23% express strong agreement (score 4).

Moderate agreement (score 3) represents 18% of responses, indicating that some respondents may be integrating both active and passive marketing strategies.

Only 3% of respondents expressed disagreement with the statement, indicating the particular circumstances of their business.



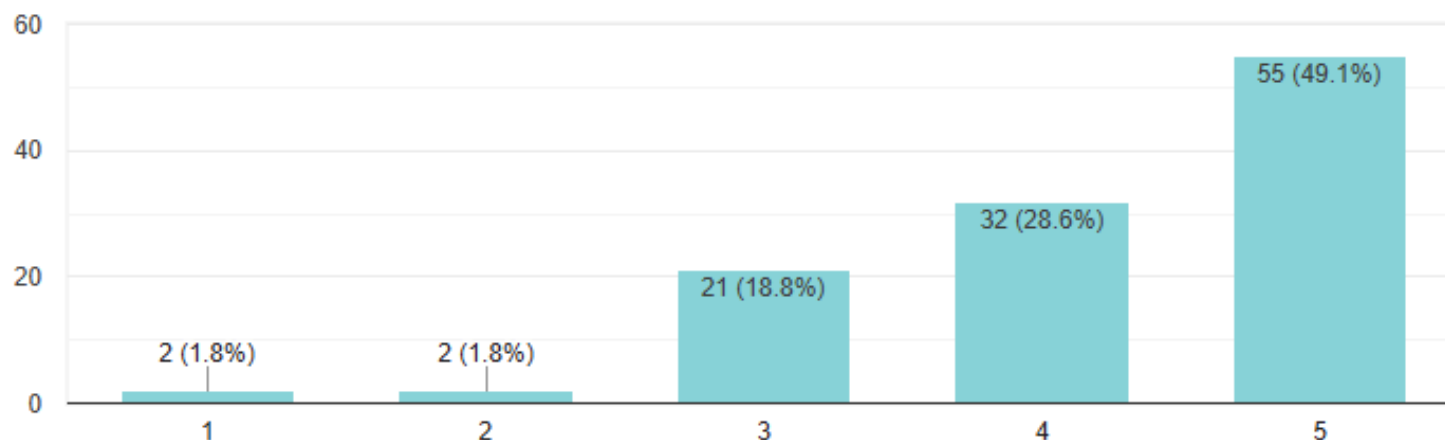
Results of the 2024 Charter Season Satisfaction Survey

Reactions of various markets

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

Want to know how any market reacts in real time in order to calculate the price of our services.

112 responses



The vast majority of respondents (49%) agree that understanding market reactions is critical for them to adjust prices appropriately.

Moderate agreement (score 4) represents an additional 29% of responses, signifying a widespread demand for improved market analysis.

Only 4% of respondents did not indicate a substantial need for this information.



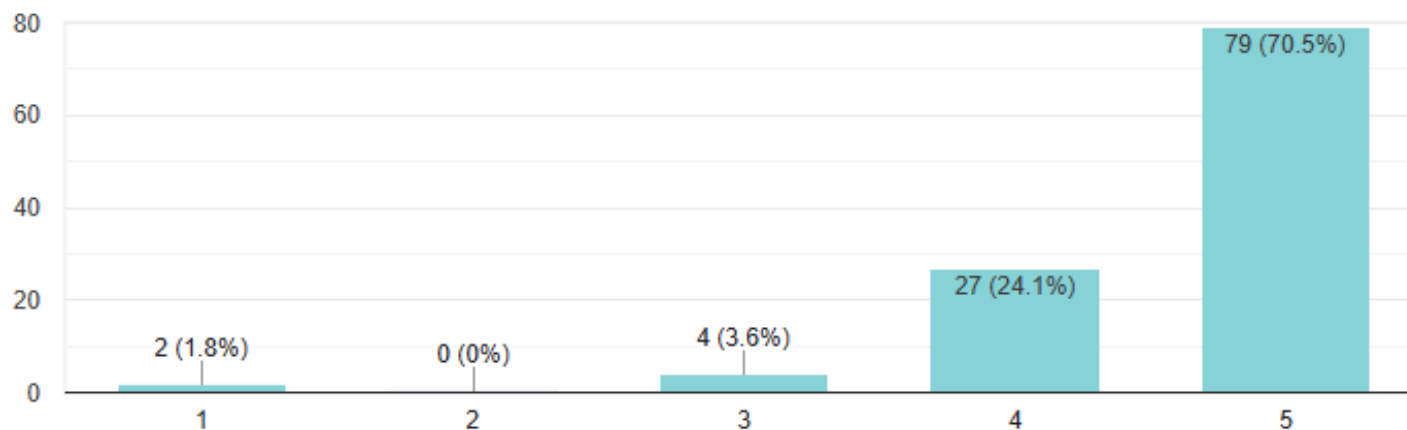
Results of the 2024 Charter Season Satisfaction Survey

How to establish pricing?

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

We want to sell with less discounts.

112 responses



The vast majority of respondents (70%) completely agree that they want to sell weekly tickets for the highest possible price without offering significant discounts.

Moderate agreement (score of 4) was noted among 24% of respondents.

Only 2% of respondents express disagreement with this statement, indicating that the majority of charter companies perceive offering discounts as a necessary evil that they aim to minimize.



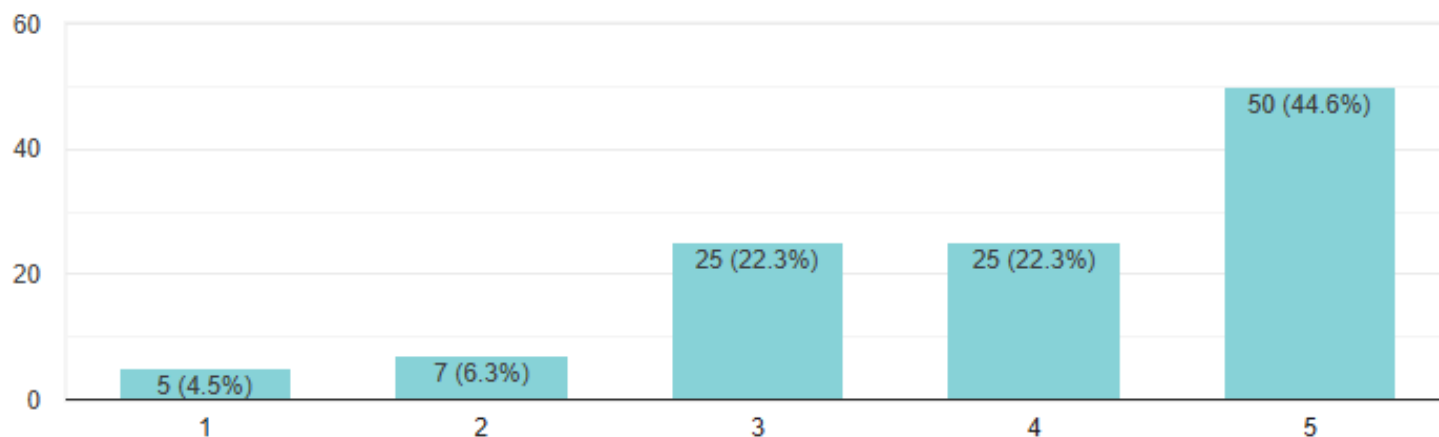
Results of the 2024 Charter Season Satisfaction Survey

Utilization of digital tools

Rating scale: From 1 (strongly disagree) to 5 (strongly agree).

We need digital tools to automate some procedures.

112 responses



More than a third of respondents (45%) express strong agreement regarding the necessity of digital automation tools.

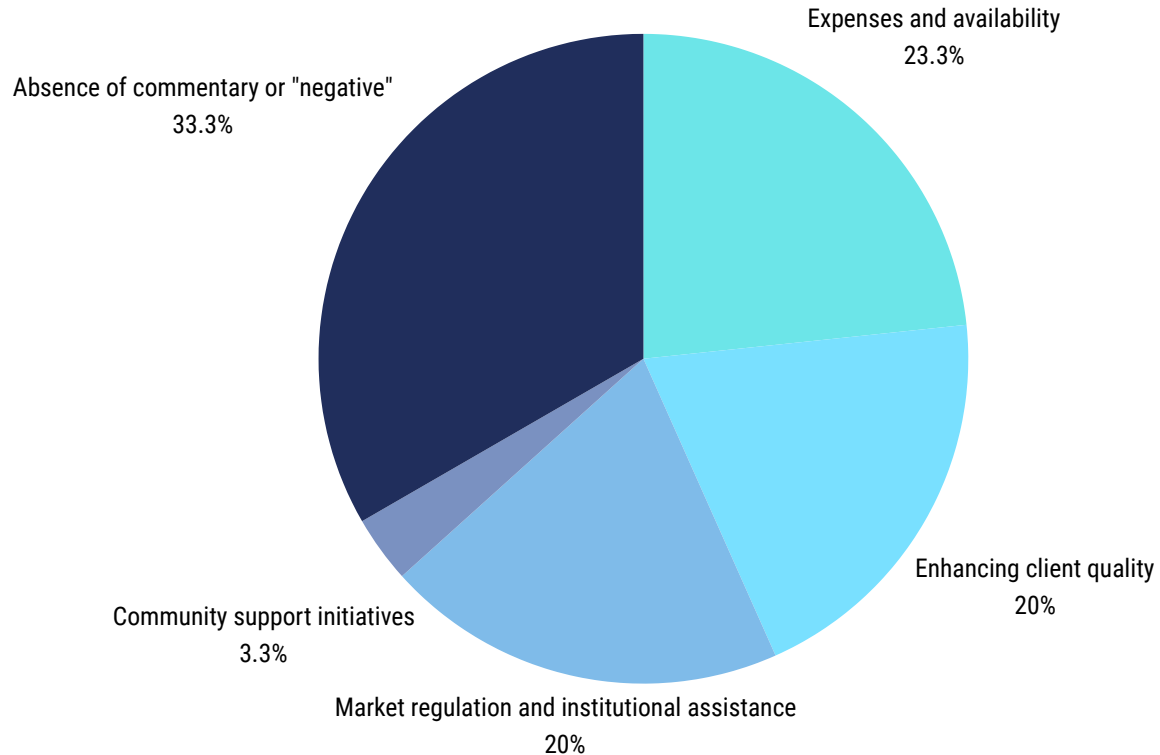
An additional 22% demonstrate moderate agreement (score 4), reflecting widespread acceptance of digitalization as a priority.

Moderate disagreement (scores of 1 and 2) was noted by 11% of respondents, suggesting a reduced necessity for automation in specific companies.



Results of the 2024 Charter Season Satisfaction Survey

Are there any additional DESIRED OUTCOMES that we have not addressed that hold significant importance for you?



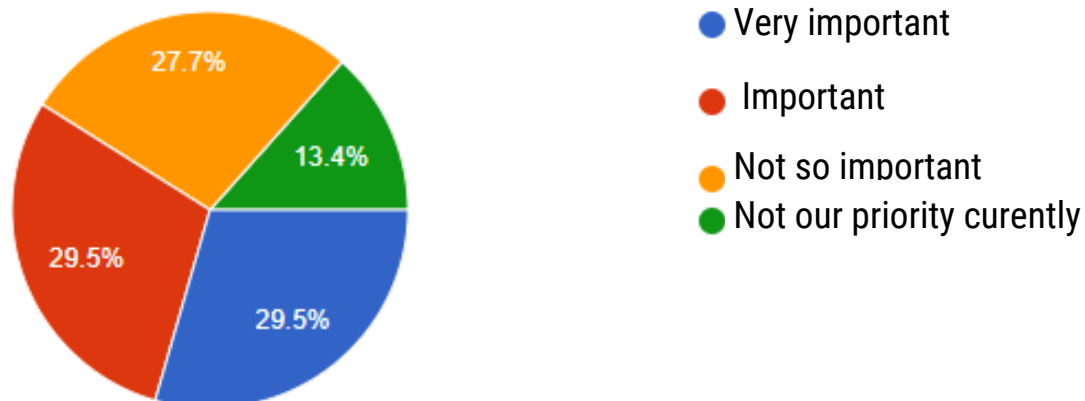
Respondents emphasise the need for cost reductions in marinas, berths, and restaurants, as well as an improved price-to-service ratio, to increase the accessibility of nautical tourism. There is a strong desire to attract higher-income and educated sailors, as well as a call for more robust market regulation and oversight of large charters and foreign companies. Furthermore, respondents expect tourism institutions to provide more support during the off-season by promoting nautical tourism and offering incentives.



Results of the 2024 Charter Season Satisfaction Survey

How important is automated communication with clients?

112 responses



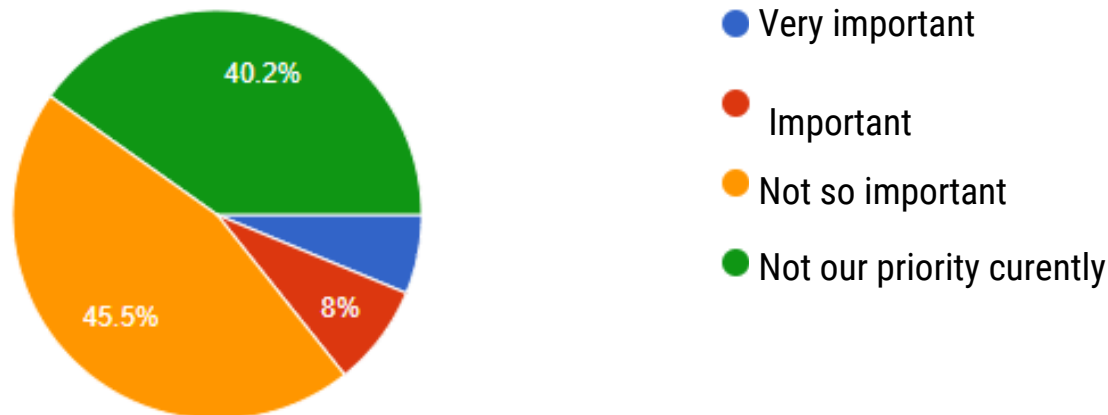
The results indicate that content automation and communication personalization rank highly among the priorities of most respondents, emphasizing the need for continued investment and enhancement to boost business efficiency and customer satisfaction.



Results of the 2024 Charter Season Satisfaction Survey

How important is collaboration with influencers and user-generated content (UGC) for attracting new clients?

112 responses



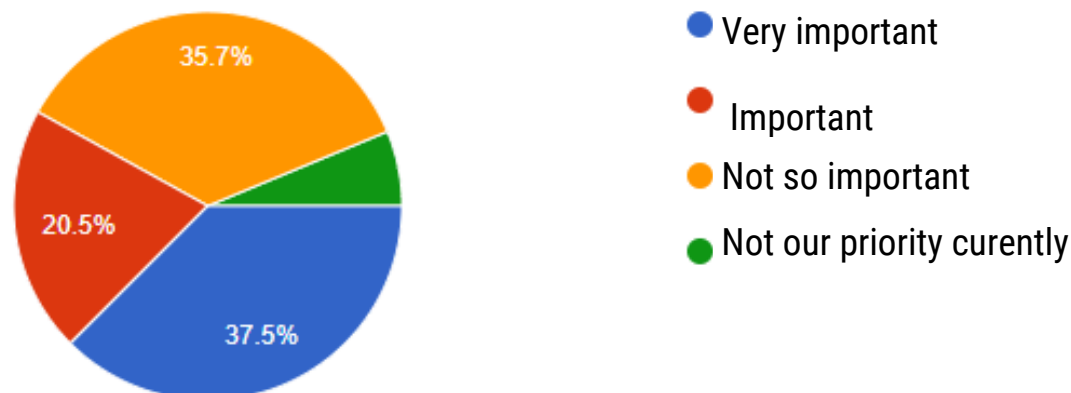
The results indicate that the majority of respondents do not prioritize collaboration with influencers and user-generated content as essential strategies for attracting new clients. Most utilize client content sporadically, while a considerable segment perceives this approach as irrelevant to their business. A limited number of respondents intend to formulate a strategy for engaging with influencers, and only a handful are currently implementing such a strategy.



Results of the 2024 Charter Season Satisfaction Survey

How important is long-term branding and communication for environmental initiatives?

112 responses



Thirty-seven percent of respondents regard sustainability as a fundamental component of their strategy, actively incorporating it into their branding and communication efforts. Twenty percent plan to integrate sustainability into their campaigns, reflecting an increasing trend in the adoption of this practice. Thirty-six percent of respondents recognize the significance of sustainability; however, they remain largely uninvolved, while a minority (6%) does not regard this issue as a priority.



Results of the 2024 Charter Season Satisfaction Survey

Summary of the survey regarding the challenges and priorities faced by charter companies.

The survey identified several significant trends, challenges, and priorities among charter companies, emphasizing business strategies, costs, digitalization, and sustainability.

Business obstacles:

- The high costs associated with marinas, berths, and other services prevail as the primary challenges, compounded by a subpar price-quality ratio of these services.
- Issues such as predatory pricing and illicit chartering undermine market stability and foster inequitable competition.

Targeted market strategies:

- Respondents aim to attract customers with greater purchasing power and expand their clientele beyond the EU; however, limited marketing resources hinder these efforts.
- Sustainable branding and the communication of environmental initiatives rank highly among the priorities of most respondents. Half are already integrating sustainability into their strategies, while the remainder are in the planning stages.



Results of the 2024 Charter Season Satisfaction Survey

Summary of the survey regarding the challenges and priorities faced by charter companies.

Digitalization and technology:

- There is an increasing interest in automation, analytics, and artificial intelligence for optimizing campaigns and enhancing customer understanding.
- The majority of respondents are contemplating the adoption of advanced digital tools, whereas a lesser number are actively integrating technologies into their businesses.

Marketing and Promotion:

Video content is gaining significance, yet it is predominantly utilized sporadically or infrequently. Merely 10% consistently incorporate video as an integral component of their strategy.

Collaboration with influencers and user-generated content presently exhibits limited application, presenting opportunities for growth and education.

Targeted market strategies:

- Respondents aim to attract customers with greater purchasing power and expand their clientele beyond the EU; however, limited marketing resources hinder these efforts.
- Sustainable branding and the communication of environmental initiatives rank highly among the priorities of most respondents. Half are already integrating sustainability into their strategies, while the remainder are in the planning stages.



Results of the 2024 Charter Season Satisfaction Survey

According to the survey results, charter companies are generally not entirely satisfied with the season. The primary reasons for this dissatisfaction include:

A decline in reservations relative to previous years, which many respondents identified as an issue. Elevated operating expenses, encompassing marina fees, mooring charges, and additional service costs, diminish profitability.

Competition issues, including price undercutting by large fleets and online agencies.

Although there are indications of positive initiatives, including investments in digitalization and sustainability, the findings imply that respondents remain cautious and dissatisfied with the prevailing business conditions.

To obtain a more accurate response, further segmented insights (e.g., by region or fleet size) may reveal variations in satisfaction. Nevertheless, the overall tone of the responses indicates a significant dissatisfaction with the season.



Results of the 2024 Charter Season Satisfaction Survey

Conclusion

Charter companies acknowledge the need for digital transformation, sustainable practices, and modern marketing techniques; however, they face challenges such as high costs, unfair pricing, and a lack of skilled workforce.

Nonetheless, the rising interest in technology, automation, and sustainability highlights encouraging trends in innovation and competitiveness. To ensure the long-term viability of the industry, it is crucial to invest in digital tools, marketing efforts, and enhanced regulatory frameworks.



Results of the 2024 Charter Season Satisfaction Survey

We would like to extend our gratitude to all participants in this research for their invaluable insights. We anticipate further collaboration and the opportunity to work together to enhance our industry. Should you have any additional comments, suggestions, or ideas, please do not hesitate to reach out to us. Together, we can navigate challenges and capitalize on opportunities for an even more prosperous future.

Thank you for your confidence and support!

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