INTERNATIONAL CONGRESS ON COASTAL & MARINE TOURISM
Development, Impacts and Management

OPPORTUNITIES AND IMPEDIMENTS

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Çeşme – TURKIYE

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WHAT IS WTO?

- a specialised agency for the United Nations,
- promotes the development of responsible, sustainable and universally acceptable tourism,
- has a catalytic role in promoting:
  - technology transfer,
  - international co-operation
  - public – private sector partnership
- has 145 full members
- and 7 Associate members.
- The membership is open to the private sector, educational institutions, tourism associations and destination management organisations.
GENERAL TOURISM TRENDS: FACTS & FIGURES
The Inevitable Expansion of International Tourism

International Tourist Arrivals by Receiving Region, 1950-2004*

annual average growth: 6.5%

763 million

25 million

Middle East
Africa
Asia and the Pacific
Americas
Europe
International Tourist Arrivals, 1950-2020
Current Situation and Forecasts
WTO Tourism 2020 Vision

Estimated annual average growth:
1995-2020: 4.1%

- South Asia
- Middle East
- Africa
- East Asia/Pacific
- Americas
- Europe
International Tourist Arrivals:
- 763 million, +11%
- Average growth 1990 - 2004: 4%
  - Europe: + 5%
  - Asia and the Pacific: +28%
  - Americas: + 11%
  - Middle East: + 18%
  - Africa: + 8%

International Tourism Receipts:
- US$ 622 billion;
- +10% in local currencies, constant prices
International Tourism Re-bounds in 2004

International Tourist Arrivals (volume)

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume (mil.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>549</td>
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<tr>
<td>1997</td>
<td>585</td>
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<td>609</td>
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<td>2001</td>
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<td>2003</td>
<td>651</td>
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<td>2004</td>
<td>680</td>
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<tr>
<td>2005</td>
<td>700</td>
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<tr>
<td>2006</td>
<td>689</td>
</tr>
<tr>
<td>2007</td>
<td>763</td>
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</table>

International Tourist Arrivals (% change)

<table>
<thead>
<tr>
<th>Year</th>
<th>% Change</th>
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<tbody>
<tr>
<td>96/95</td>
<td>5.8</td>
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<tr>
<td>98/97</td>
<td>3.9</td>
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<tr>
<td>00/99</td>
<td>3.3</td>
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<tr>
<td>'02/01</td>
<td>3.9</td>
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<tr>
<td>'04*/03</td>
<td>10.7</td>
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</tbody>
</table>

Notes:
- '04*/03 indicates estimated data.
International Tourism, 2004*
International Tourist Arrivals and Market Share (%)

- **Americas**: 126 million, 17%
- **Africa**: 33 million, 4%
- **Middle East**: 35 million, 5%
- **Asia / Pacific**: 153 million, 20%
- **Europe**: 416 million, 54%

*Preliminary results

Source: World Tourism Organization
International Tourism Receipts, 2004

US$ 622 billion

- Europe: 52% (US$ 820)
- Americas: 21% (US$ 820)
- Asia and the Pacific: 20% (US$ 790)
- Middle East: 3.3% (US$ 580)
- Africa: 3.0% (US$ 570)

Receipts per arrival (US$): 1,050 (Americas)

World: 820

Americas: 1,050

Asia and the Pacific: 820

Europe: 790

Middle East: 580

Africa: 570
# World's Top Tourism Destinations

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<tbody>
<tr>
<td>1</td>
<td>United States</td>
<td></td>
<td>Italy</td>
<td>Canada</td>
<td>France</td>
<td>Spain</td>
<td>United States</td>
<td>France</td>
</tr>
<tr>
<td>2</td>
<td>Canada</td>
<td></td>
<td>Canada</td>
<td>France</td>
<td>Spain</td>
<td>Italy</td>
<td>United States</td>
<td>Spain</td>
</tr>
<tr>
<td>3</td>
<td>Italy</td>
<td>71%</td>
<td>France</td>
<td>Spain</td>
<td>Italy</td>
<td>Hungary</td>
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<tr>
<td>4</td>
<td>France</td>
<td></td>
<td>Switzerland</td>
<td></td>
<td>United States</td>
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<td>5</td>
<td>Switzerland</td>
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</tr>
<tr>
<td>6</td>
<td>Ireland</td>
<td></td>
<td>Austria</td>
<td>Germany</td>
<td>Switzerland</td>
<td>22%</td>
<td></td>
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<tr>
<td>7</td>
<td>Austria</td>
<td>17%</td>
<td>Germany</td>
<td>Switzerland</td>
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<tr>
<td>8</td>
<td>Spain</td>
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<td>Germany</td>
<td>Yugoslavia</td>
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<tr>
<td>9</td>
<td>Germany</td>
<td></td>
<td>Germany</td>
<td>United Kingdom</td>
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<td></td>
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<tr>
<td>10</td>
<td>United Kingdom</td>
<td></td>
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<tr>
<td>11</td>
<td>Norway</td>
<td></td>
<td>Hungary</td>
<td>Czechoslovakia</td>
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<tr>
<td>12</td>
<td>Argentina</td>
<td></td>
<td>Greece</td>
<td>Portugal</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Mexico</td>
<td>9%</td>
<td>Belgium</td>
<td>Malaysia</td>
<td>10%</td>
<td></td>
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</tr>
<tr>
<td>14</td>
<td>Netherlands</td>
<td></td>
<td>Bulgaria</td>
<td>Malaysia</td>
<td>10%</td>
<td></td>
<td></td>
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<tr>
<td>15</td>
<td>Denmark</td>
<td></td>
<td>Romania</td>
<td>Croatia</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Others</td>
<td>3%</td>
<td>Others</td>
<td>25%</td>
<td>Others</td>
<td>33%</td>
<td>Others</td>
<td>42%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>25 million</td>
<td></td>
<td>166 million</td>
<td></td>
<td>441 million</td>
<td></td>
<td>763 million</td>
<td></td>
</tr>
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</table>
Top Tourism Destinations, 2004*

**International Tourist Arrivals**

- France: 75.1 million
- Spain: 53.6 million
- USA: 46.1 million
- China: 41.8 million
- Italy: 37.1 million
- UK: 27.7 million
- Hong Kong (China): 21.8 million
- Mexico: 20.6 million
- Germany: 20.1 million
- Austria: 19.4 million

**International Tourism Receipts (US$)**

- USA: 74.5 billion
- Spain: 45.2 billion
- France: 40.8 billion
- Italy: 35.7 billion
- Germany: 27.7 billion
- UK: 27.3 billion
- China: 25.7 billion
- Turkey: 15.9 billion
- Austria: 15.4 billion
- Australia: 13.0 billion

*Preliminary results

Source: World Tourism Organization
2005: International Tourism on track for another strong year

International Tourist Arrivals

<table>
<thead>
<tr>
<th>Region</th>
<th>'03/02</th>
<th>'04*/03</th>
<th>*05/04 (Jan-Jul)</th>
</tr>
</thead>
<tbody>
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<td>World</td>
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<td>5</td>
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<tr>
<td>Europe</td>
<td>1</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Asia / Pacific</td>
<td>-9</td>
<td>28</td>
<td>9</td>
</tr>
<tr>
<td>Americas</td>
<td>-3</td>
<td>11</td>
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<tr>
<td>Africa</td>
<td>4</td>
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<td>9</td>
</tr>
<tr>
<td>Middle East</td>
<td>3</td>
<td>18</td>
<td>3</td>
</tr>
</tbody>
</table>

*Preliminary results

Source: World Tourism Organization
International Tourist Arrivals
2002-2005* : monthly evolution
COASTAL & MARINE TOURISM

OPPORTUNITIES AND IMPEDIMENTS

Coastal tourism is based on a unique resource combination at the border of land and sea environments (beaches, scenic views, sun, rich biological diversity etc.)

Particularly in Europe, coastal tourism = mass tourism.

Becoming increasingly competitive, the consumer expecting more quality.
2020 Tourism vision:

International arrivals: Over 1.56 billion

- 1.2 billion intraregional
- 0.4 billion long haul travellers

1) Europe: 717 million tourists
2) East Asia and the Pacific: 397 million
3) Americas: 282 million

Coastal zones are the target of over ¾ of the world tourism.

Mediterranean region: more than 100 million arrivals a year.
Coastal tourism developments have tended to be made in pursuit of short term economic benefits with damaging consequences for medium term environmental objectives.

Without ignoring the market forces:

- Spatial planning, regional and local policy must manage and influence consumer demand towards more sustainable products.
- Coastal tourism management can be improved through further understanding of social and ecological systems and their linkages.
Tourism development should last not only for tourism but also for the host destination and community: Need for an integrated approach.

The environmental qualities on which marine tourism depends should be maintained and enhanced.

Based on a shared trans-national resource, marine tourism implications should address the integration between all the related sectors, different levels of administration and the territories.

- Demand and supply
- The product (cruise packages)
- Economic impact
- Sustainability
- Safety and security issues
- Medium-term trends, etc.
CLIA (Cruise Lines International Association):

- Represents nearly 98% of the cruise capacity marketed in North America
- 10.6 million people travelled on cruise lines in 2004 (9 million from North America)
- Estimation for 2005: 13 million passengers (CLIA carried 2.66 million during the first quarter of 2005)
- 2.3% increase over the same period in 2004
WORLD TOURISM ORGANISATION

• Estimation of 202.7% occupancy rate in the second quarter of 2005 (2004: 107%)
• Annual increase in the cruise ship market: 8-15%
• Pacific-Asia region, Antarctica, South America, Middle East are growing rapidly
• Total economic impact: 23 billion US Dollars a year
Analysis of demand:

- High number of first timers
- All segments of the population (especially US & Canada)
- Average age: 46
- Average household income $\approx 50,000$ US Dollars (US cruisers)
- 2004: More than 1 million children under the age of 18

Analysis of supply:

- Represents 0.6% of the world accommodation capacity
- Business confidence in the industry: over 14 billion US Dollars
- High present and future grow rates (8-15 per year)
- Generated tourist expenditure on destinations
- Demand for new tourism destinations
- High added value of cruises
CAPACITIES OFFERED BY SEASON (2002)

October-March

- Caribbean
- Mediterranean
- Western Mexico
- South America
- Indian Ocean
- Asia-Pacific
Some of the negative **environmental** and **cultural impacts** are as follows:

- Air pollution through the emission of sulphur rich exhaust fumes,
- Water consumption,
- Waste (sewage, oils, garbage, plastics, hazardous substances,
  - e.g. one week voyage produces: 8 tons of garbage, 1 million gallons of waste water, 210 000 gallons of sewage, 25 000 gallons of oil-contaminated water
- Anchor damage and pollution through toxic paints, etc.
- Infrastructure impacts due to the development of construction sites, new berthing areas, deeper channels and ports
- Cultural impact: Overcrowding of particular destinations
- Pressure on destination services & infrastructure
The relative slowdown in the US demand compared to other markets


Changes in the demographic structures of demand, younger consumer with lower purchasing power from all segments of the population

Greater demand for specialised products

Cruise package price will fall due to the economies of scale, advanced technology and shorter duration of cruises

Ever-increasing size-tonnage with advanced technology: safer, more complex, with more on-board facilities generating larger on board revenues

15 November 2005
The modernisation of fleets for technical and economic efficiency reasons will continue at the current pace.

The horizontal concentration of the industry will accelerate (the investment required to build a standard modern cruise ship exceeds 300 million US Dollars; in this competitive environment, only, highly specialised small cruise lines will be able to survive.

The substantial rise in demand will be accompanied by an expansion in the regions where cruises operate with greater activity in established destinations and the strong entry of emerging destinations like South America, Africa and the Pacific Asia.
IT IS OBVIOUS THAT FURTHER STUDY IS ESSENTIAL FOR CRUISE SHIP ACTIVITIES:

1) Economic impact on destinations
2) Negative impacts on the natural environment and indicators to monitor the impacts and manage the industry
3) Safety and security issues
THANK YOU ...

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