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INTERNATIONAL CONGRESS ON COASTAL & MARINE TOURISM

DEVELOPMENT, IMPACTS AND MANAGEMENT

November 15-18, 2005

Çeşme, Turkey



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CONTENTS

	Page
FOREWORD	III
COMMITTEES	V
SUPPORTERS AND SPONSORS	VII
PROGRAMME	IX
CONTENTS	XV

YACHT TOURISM AND MARINA MANAGEMENT I

1 A Comparative Analysis of the Marina Development In Two Mediterranean Countries: The Case of Greece and Turkey <i>Nikolaos TRIHAS, Konstantinos TSILIMPOKOS, Magioulia TSILIMPOKOU</i> ...	1
2 A Proposal to Integrate Turkish Marinas and Hospitality Industries <i>Özen KIRANT, Engin Deniz ERİŞ</i>	11
3 Marina Development in Historical Harbour City of Girne- A North Cyprus Case <i>Erdal AKSUGÜR, Ali GÜNYAKTI, Hasan Ali BIÇAK, Mehmet ALTINAY</i>	22
4 Sustainable Waterfront Marina Development <i>Tom CHAPMAN</i>	33
5 New Rules For Yachts and Leisure Crafts and Their Impact <i>Metin TAYLAN, Yalçın ÜNSAN</i>	41

YACHT TOURISM AND MARINA MANAGEMENT II

6 A Comparative Course Through the History of Yacht Tourism in Turkey <i>Galip İSEN</i>	49
7 Alternative Propulsion Systems For Environment Friendly Daily Excursion Type Leisure Boats <i>Yalçın ÜNSAN, Metin TAYLAN</i>	58
8 Advantages of Flotilla Tourism <i>Suavi AHİPAŞAOĞLU</i>	69
9 Turkish Legislation on Foreign Flagged Yachts <i>Huriye KUBİLAY</i>	79
10 Could Yacht Tourism be an Alternative Tourism Potential in North Cyprus? <i>Hasan Ali BIÇAK, Mehmet ALTINAY, Erdal AKSUGÜR, Ali GÜNYAKTI</i>	87

11 A Research on Evaluating the Current State of Yacht Tourism on the Route of Bodrum – Antalya	
<i>Gökçe ÖZDEMİR</i>	97

TRENDS IN OCEAN, MARINE AND COASTAL TOURISM

12 Trends of Coastal Tourism Offer in Croatia	
<i>Branka BERČ RADIŠIĆ, Edna MRNJAVAC, Nadia PAVIA</i>	108
13 Developing Marine Tourism Marketing Strategies for Turkey	
<i>Hilal İNAN, Deniz ZEREN</i>	117
14 Nautical Tourism on Serbia and Montenegro Coast - Possibilities for Development	
<i>Branislav DRAGOVIC, Zoran RADMILOVIC, Tonka CARIC</i>	126
15 Impacts of Marine Tourism and Sustainable Management Applications	
<i>İge PIRNAR</i>	138
16 Vulnerability of Coastal Resorts to Crises: Probable Scenarios and Recovery Strategies	
<i>Ebru GÜNLÜ AKSAKAL, Gürhan AKTAŞ</i>	149

MARINE TOURISM AND TRANSPORTATION

17 A Conceptual Study on Coastal and Cruise Shipping Related Information Communication Needs	
<i>Hüseyin İshak Halil KESİKTAŞ, Umut Mehmet YÜRÜYEN, Nikitas NİKİTAKOS</i>	166
18 Coastal Shipping Between Greece and Turkey: Towards Sustainable Tourism?	
<i>Maria LEKAKOU, Didem ÖZER, Athanasios A. PALLIS</i>	176
19 The Development of Yacht Tourism in the North & South Aegean Regions	
<i>Paris TSARTAS, Dimitris LAGOS</i>	187

ECOTOURISM

20 A Comparison of Ecotourism and the Agri-Environment of Turkey's Aegean Region With That of the EU – Identification of Key Environmental Conservation Challenges for the 21st Century	
<i>Frank BATES, Melek AKIN</i>	197
21 An Integrative Tourism Marketing Effort: Eco-Tourism Opportunities of the Eastern Black Sea Region of Turkey and Possible Sea Transport Routes to the Region	
<i>Çiğdem ŞAHİN</i>	207
22 A Case Study for Evaluation of Ecotourism Approach, Basin of Lake Beyşehir (Konya)	
<i>Fadim YAVUZ ÖZDEMİR, Elif GÜNDÜZ</i>	217

23 Exploring Marine Ecotourism: Is It a Sustainable Option or Not? <i>Işıl ÖZGEN</i>	226
24 The Nature of Ecotourism Activities of Travel Agencies in Turkey <i>Nazmiye ERDOĞAN, Emin BARIŞ</i>	235
25 Sustainable Coastal and Marine Tourism Development in Iskenderun Bay <i>Nuriye GÜREŞ, Yasin BİLİM</i>	243

RECREATION AND WATER SPORTS

26 Leisure Time Valuation and Obstacles to Recreation in Turkey <i>Burhanettin ZENGİN, Mustafa AKAL</i>	254
27 Sharks, Wildlife Tourism and State Regulation <i>John DOBSON</i>	273
28 Investigation of Special Boat Types Suitable for Daily Tours or Fast Transportation along the Coasts of Aegean Sea <i>Yalçın ÜNSAN, Metin TAYLAN</i>	283
29 Kayiks of Izmir: An Extinct Design Is Reborn <i>Emrah ERGİNER, Serim PAKER, Osman ERKURT</i>	294

CRUISE SHIPPING

30 The Cruise Industry: A Service Approach <i>Asuman SONER</i>	301
31 An Integrated Development of Cruise Industry with Timeshare in the Northeast Mediterranean Region Potential and Future Prospects in Greece and Turkey <i>Theodoros STAVRINOUDIS</i>	316
32 Cruise Tourism Applications in Turkey and Suggestions for Improvement <i>Göknil Nur KOÇAK, İge PIRNAR</i>	328
33 Cruise Vessels Development: New Trends in Cruise Industry <i>Branislav DRAGOVIC, Zoran RADMILOVIC</i>	336
34 Replicating Caribbean Cruise Operations in the Eastern Mediterranean <i>Ernst G. FRANKEL</i>	345
35 Hybrid Model For Small Cruise Ships' Safety Risk Management <i>Nikitas NIKITAKOS</i>	351

EDUCATION IN COASTAL AND MARINE TOURISM

36 Development of Degree Based Maritime Leisure Education in the North West of England, UK <i>Steve BONSALL</i>	364
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37 Strategies for Teaching German as a Foreign Language in Tourism <i>Nevenka BLAŽEVIĆ</i>	374
38 Bilingual Education at the Faculty of Tourism and Hospitality Management in Opatija <i>Brigita BOSNAR-VALKOVIĆ</i>	382

PROTECTION, CONSERVATION AND SUSTAINABILITY IN MARINE ENVIRONMENTS

39 Marine Tourism and Pollution in Turkey: In the Framework of Environmental Protection and Sustainability <i>Burcu Selin YILMAZ</i>	388
40 Marine Species into Non-Native Environments, Non-Indigenous Aquatic Organisms Transportation Via Ships' Ballast Water <i>Zuhal ER</i>	401
41 ISO 14001:2004 Transition Plan for Coastal Organizations <i>İsmail Deha ER</i>	414

COASTAL ZONE MANAGEMENT

42 Impacts of Gazimagusa Coastal Zone Planning <i>Ali GÜNYAKTI, Erdal AKSUGÜR, Hasan Ali BIÇAK, Mehmet ALTINAY, Enver YETKİLİ</i>	425
43 History and Sustainable Development of Coastal Tourism in the City of Adana <i>Mehmet Cihan YAVUZ, K. Serdar GİRGINER</i>	434
44 Applicant Reactions to Employment Interviews in the Coastal Hotels in Turkey <i>Mustafa TEPECİ, Burak MİL</i>	445
45 Protection of Coastal and Marine Resources in Turkey for Sustainable Tourism Development <i>Ö. Devrim YILMAZ, Burcu Selin YILMAZ</i>	456
46 ACI Club as the Development Factor of Nautical Tourism in Croatia <i>Christian STIPANOVIC, Daniela GRACAN</i>	471
47 International Tourism Clusters as a Tool of the Ports, Cities and Seashore Regions Development (Case Study of the Baltic Region) <i>Marek GRZYBOWSKI</i>	481

CRUISE TOURISM APPLICATIONS IN TURKEY AND SUGGESTIONS FOR IMPROVEMENT

Göknil Nur KOÇAK*

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ABSTRACT

A continuous expansion is expected in cruise tourism supply and demand in the world. Turkey doesn't have any official and stratejic plans to be able to be a successful part of this expansion. Also literature which proposes any suggestions about improvement of cruise tourism in Turkey is very limited.

The purpose of this study is pointing out the absence and the necessity of cruise tourism planning in Turkey and suggesting some alternatives which may lead further planning process. Especially in the conditions of rising competitive environment of tourism sector, this study may contribute competing power of Turkish travel agents and tour operators and also tourism investors.

This descriptive study is suggesting three main options for planning and development of cruise tourism in Turkey, and also some application alternatives are implied referred to suggested options.

Keywords: *Cruise Tourism, Planning, Product Differentiation.*

1. INTRODUCTION

By means of cruise travels, it is seen that a new product type has emerged among world tourism alternatives. Cruise ships are defined as "floating hotels" (Hall and Braithwaite, 1990), or with another expression "floating resorts" (Wood, 2000). There is no any standard information about the duration of a cruise travel or the average amount of spending. CLIA (Cruise Lines International Association) has reported that , during the past several years most popular cruise travels were the ones those take 3-4 days, on the other hand, travels which may last 80-110 days are gaining popularity, and daily budget range of these tours differ from 100 USD to 3000 USD (Marti, 2002). It is mentioned that, cruise tours can be attractive for people who save money for a life time for such a trip as well as the high income group, generally the passengers aged sixty and above. (Marti, 2002).

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Kadioglu and Güler (1998-44) are explaining the history of the evolution of cruise ship management as follows: Cruise ship transportation was first held by Albert Balin at 1980. In 1930, due to the support of Germany government, cruise tourism presented a rapid improvement. Just after the Second World War Greek ship owners started cruise tours in the Islands Sea. However, the progress of air transportation reduced the interest on cruise tours and as a result cruise tours shifted from transportation to tourism purposes. This shift was supported by different promotion mediums. The popularity of "The Love Boat" television series in the United States in the 70s and 80s contributed to the sector's expansion and success (Dickinson and Vlademir 1997; Douglas and Douglas 2001; Wood 2004 – as quoted by Weaver, 2005). Especially after 1955, when cruise tourism began to grow and gain its modern meaning, cruise ships separated from conventional ship typologies and presented a constant improvement. The first modern cruisers began serving to Northern American customers at Caribbean in the beginning of 1970's, and than cruising spread to Britain, rest of Europe and later on Asian-Pacific region (Worldwide Cruise Ship Activity, 2003). Cruise tourism still continues to grow in the means of supply and demand.

A number of tourism researchers have already studied various aspects of cruise ships. Recent scholarship has examined the expansion of the sector (Douglas and Douglas, 2001; Dowling and Vasaduvan, 2000; Miller and Grazer 2002; Wood, 2000 and Wood 2004), the ways in which it has affected port communities and island economies (Braun, Xander and White, 2002; Dwyer and Forsyth 1998; Jaakson, 2004; Wilkinson 1999), customer service (Petrick, 2003; Teye and Leclerc 1998), tourist behavior (Douglas and Douglas, 1999; Foster, 1986), workplace conditions on board (Klein, 2002; Mather, 2002) and the notion that these ships are a reflection of the contemporary world system has even been explored (Wood, 2000 - as quoted by Weaver, 2005) and structural comparisons between cruises and hotels (Toh, Rivers and Ling, 2005). There is very limited literature in Turkey about this subject and they usually tend to mention the importance of cruise tourism throughout the world and in Turkey, and point the necessity of completing cruise tourism planning accordingly. (Barla, Aklan, Atken and Yıldız, 1998; Yercan, 1998, Boyacı and Cizel, 1998).

1.1 Purpose of the Study

The purpose of this study is to point out the possible options for Turkey to get actively involved into the cruise tourism sector, and for this purpose some options are specified and suggested.

1.2 Significance of the Study

Attracting more tourists to visit Turkey and promoting them to spend more is somehow a mutual aim of tourism sector and to achieve these goals Turkey is trying to manage product differentiation. However, cruise tourism is neglected in plans despite its well adjustment with this policy. Even though it does not exist in plans and policies, some regions in Turkey still serve as transit harbors for cruise ships. It is needed to take precautions not to fall back in the competition, and to take part in this type of tourism, and to prevent regions and harbors from troubles which they can face due to the lack of planning. This study is important by taking attention to the lack of public and private planning and by suggesting solutions to resolve the problems. This subject gains more importance, especially when the European Union membership process is considered within the context of negative and positive reflections.

1.3 Method of the Study

The work is in descriptive nature. Within the work the following aspects are searched with an inductive manner.

- Pointing out the potential demand and insufficient supply by indicating the general cruise demand and supply.
- Identifying the values created by cruise tourism.
- Examining the necessity of cruise tourism planning in Turkey.

According to the mentioned examinations, some planning options are suggested.

2. CRUISE TOURISM IN THE WORLD

Cruise tourism is growing rapidly throughout the world. Cruise industry produced a volume of 25 billion dollars business in 2003 and the amount of ships and their capacities as well as cruise demand continuously increasing (Deniz Sector Raporu, 2003).

Although 2/3 of world cruise demand is created by Northern America, even in Northern America noticeable amount of potential demand still exists. CLIA foresees the cruise tourism demand will reach to 43.5 million individuals within five years. After America Europe market is in second place with two million demands (1). Expectations and facts show that cruise tourism promises significant potentials in the near future. According to World Tourism Barometer; in the first quarter of 2004 the amount of passengers of cruise tourism reached to 7.9 millions (2). American, English and Norwegian Firms dominate the cruise tourism supply (Peisley, 1995 – as quoted by Dwyer and Forsyth, 1998: 393-394). According to the data represented in Worldwide Cruise Ship Activity, 2003 cruise industry represents just 0.6% of the world's accommodation capacity. This ratio may be seen pretty small but however there are other figures that must be taken into account in order to form a clearer picture of its importance (Worldwide Cruise Ship Activity, 2003):

- The high level of business confidence in the industry is reflected in operators' order books (worth over 14 billion dollars).
- High present and future growth rate (8% per year).
- Tourism consumption generated at destinations.
- The possibility of opening up new destinations for land-based tourism due to the intense desire created by cruises to return to the destination.
- High added value of cruise.

In 2003, North Amerikan cruise lines have out-performed the hotels with an average of more than 95% cabin occupancy rate, which have an average room occupancy rate of only 59% (Toh, Rivers, Ling, 2005: 121).

The average growth rates of countries/regions within the cruise tourism were noted as; USA 7%, Europe 15%, Britain 17%, Spain 24%, South Cyprus 40% in the 11th of TUYED's (Turizm Yazarları, Gazetecileri and Editörleri Demeği -Tourism Authors, Journalists and Editors Foundation) series of panels called "Meetings With the Sector", which was held at 25 December 2003. As seen from these figures, Cyprus as one of the "growing markets" in the Mediterranean route is growing rapidly in cruise tourism (http://www.tgc.org.tr/suat_tore/yazi10.htm). Greek Ministry of Tourism is also highly promoting cruise tourism (3). Dubai may be given as another example of those countries

which trying to participate in world cruise tourism market with new routes (4). These examples can be assumed as signs for the improvement of cruise tourism and increase in competition.

3. CRUISE TOURISM IN TURKEY

Geographically, Turkey is located at very suitable and important region for cruise tourism. Throughout the world there is no place where three continents, like Asia Africa and Europe, can be visited in a short term cruise tour (Sea Sector Report, 2003). On the other hand, Turkey's cultural and historical attractions are widely known. Despite all these advantages, Turkey is pretty weak about cruise tourism. Among 13 million tourists who have visited turkey, only one million preferred sea transportation (Sea Sector Report, 2003). This ratio highlights the given (or lack of given) importance to the sector. The improvements observed in yachting sector should be vitalized in cruise sector (Sea Sector Report, 2003).

Table 3 shows the statistics of transit passengers of cruise ships which visited Turkey.

Table 3: Cruise Ships' Transit Passenger Statistics (2004)

Harbor	Number of Journeys	Number of Passengers
Kuşadası	343	310.000
İstanbul	132	182.000
Alanya	101	54.488
Antalya	56	56.704
Marmaris	62	66.973
Dikili	17	9.560
Trabzon	13	3.832
İzmir	32	64.000
Bodrum	65	45.000
Sum	821	792.557

Source: Deniz Ticareti Dergisi, 2005 January, p.51

Varlier (2003) has pointed that 10 millions of passengers travel in Mediterranean Bowl and Aegean Sea hosts 5% of this amount in 2002 (5). Authorities of Ege Port A.S. who is running the Kusadası Harbour, reports that at the end of 2005 season 412 cruises and a 400 thousand cruise tourists, is expected to be hosted by the harbor and the village (6). According to table 3 and these explanations, it is understood that Kusadası is the number one region which hosts cruise tourists in Turkey. However, it is known that Kusadası has been criticized because of exceeding its carrying capacity. Even this shows the lack of cruise tourism planning.

In TUYED's final report, it is mentioned that the search of cruise tourists for new places, may provide new opportunities for Turkey, and suggested that Turkish Travel Agents Union (TÜRSAB) and the Russian Travel Agencies Union (RATA) may attempt to

develop cruise tourism at Black Sea (7). But even this attempt was supported by International Federation of Tour Operators (IFTO) it did not brought up to reality.

Although some progress is due in Turkey such as "MSC Cruises Turkey" was founded by the partnership of Mediterranean Shipping Company (MSC) and Arkas and cruise tours organize by this firm is still continuing. These efforts are very important for the sector, but not enough when the potential is considered.

4. DISCUSSIONS AND SUGGESTIONS FOR IMPROVEMENT

Turkey's portion taken from the world cruise tourism depends on the choices of foreign ship operators. Cruises are dropping their passengers for a day shopping to specified harbors and Turkey's gain comes only from these passengers' daily spending within the harbor area. Cruise tourism may be used as a tool in order to avoid disadvantages of tourism seasonality and to diminish regional development differences. Here suggested some alternative actions for Turkey to increase its gaining and obtain more sufficient benefits from cruise tourism. These alternative actions in order:

1. Improving the variety of goods and services which offered to cruise customers for the purpose of increasing their spending and revenue of the host region.
2. Attracting more cruises to visit Turkey.
 - 2.1. Adopting necessary actions to persuade more cruises to visit presently engaged ports more often and stay longer.
 - 2.2. Suggesting some other ports in different regions of Turkey to the cruise operators which may provide alternative attractiveness for cruise customers and by doing so obtaining additional benefits for these ports's host community.
3. Encouraging Turkish investors to run their own cruise business by either owning or renting cruise(s).

Below, there are some suggestions for the application of the mentioned three alternative actions.

1. Improving the variety of goods and services which offered to cruise customers for the purpose of increasing their spending and revenue of the host region:

World Tourism Organization is foreseeing that; due to changing customer profile to satisfy changing needs some new tourism styles may appear. One of these improving tourism styles is nature based tourism (Gökdeniz, Çeken and Erdem: 2003). Turkey holds an extraordinary potential, considering to the world, with its nature tourism resources in all its regions. Nature tour alternatives, gastronomy tours may be organized and suggested to the cruise passengers. Unique natural and cultural sources of Turkey may encourage the preferences of cruise operators and customers.

2. Attracting more cruises to visit Turkey:

To achieve success with the efforts of increasing cruise visits to the Turkish ports, considering the carrying capacity of port areas is very essential. On the other hand, economic contributions of cruise tourism to the host communities should be examined with reference to features of local economies. For instance, non-developed region harbors in tourism, or regions which suffer from all-inclusive system may be appropriate choices.

In Turkey there may be many places which are suitable for cruise tourism. For example, at Adana's governor's official web site, Yumurtalık and Karataş coasts are reported as suitable for cruise tourism (8). Same approach is also valid for Black Sea region.

Another important issue for the ports and destinations which are subject to cruise tourism is environmental sustainability which should be assured by the local authorities. It is also important that the local authorities of the cruise destinations should work in close relation with cruise operators to sustain the social justice (Johnson, 2002). These actions may encourage local support towards cruise tourism and create improved and long rang satisfaction for all parties. These approaches should be applied to regions which already accept and potentially will accept cruise tourists.

Another aspect which should be considered about cruise tourism is the institutioning of specialized agencies about cruise tourism. In the research of Toh at al. (2005: 134), it is pointed out that among 1.8 million passengers carried by Carnival Cruise Agency, just 0.5% made their reservations from internet, and likewise Norway Cruise Lines reported a percentage of %0.6. Cruise passengers require getting informed about the alternatives and this can be provided by experienced agencies. (Toh at al., 2005: 134). Considering the mentioned facts, by improving their qualifications, Turkish agencies may achieve an advantage under the improving competition conditions especially if the European Union membership process concludes.

In order to attract more cruises to visit Turkey, some other ports in different regions of Turkey may be suggested to the cruise operators. After necessary feasibility studies completed appropriate seaports and airports can be renovate or even new ones may be developed. Seaports and airports development and renovation efforts may be perceived as nonprofitable when only compared with the revenue expected from cruise tourism. However, these investments are in harmony with the development policies of airports and seaports especially when considered EU adaptation process. This process may contribute to the collaboration of different governmental bodies such as Ministry of Culture and Tourism, Ministry of Transportation and Sea Counsellorship. This cooperation with shared mutual aims may lead to more efficient and unified results.

The possibility of realization of all these suggestions is significantly related to the legal authorities' viewpoint. As the precautions consisted in the official plans about tourism and revenue improvements examined; it's seen that "product differentiation" is one of the main approaches which has been mentioning since 1979. Likewise in the web site of the Culture and Tourism Ministry there exist a long range tourism activities list consist; "hunting, faith tours, winter sports, silk road, thermal resorts, congress tourism, golf, youth tourism, yachting, botanic, spelunking, highlands, air sports, mountaineering, rafting, underwater diving, ornithology" but there is nothing mentioned about cruise tourism (9). This is considered as a remarkable absence.

3. Encouraging Turkish investors to run their own cruise business by either owning or renting cruise(s):

In order to promote investments on cruise tourism, structural advantages of this sector should be mentioned. Cruise lines have perishable assets that are movable, and this structural advantage has been used after September 11 to relocate cruise ships to safer locations (Toh, Rivers, Ling, 2005: 133). This superiority is indeed very important to

manage the structural disadvantages of tourism. "Carnival Cruise Lines" who essentially created the mass-market cruise holiday were advertised it's ships as the main holiday destinations for tourists (Weaver, 2005).

At TUYED's panel, it is pointed out that according to the DIE's (State Institute of Statistics) data, there are 3.5 million individuals whose annual income are over 28.000 dollars in Turkey. With reference of an 8 to 10 days cruise tour's price which starts from 1.500 dollars, it's mentioned that there are 3.5 million potential cruise customers in Turkey. However at the moment just ten thousand people are attending to these tours (7). Relying upon this statement, there expected sufficient demand in Turkey to support cruise tourism. In order to vitalize the cruise sector in Turkey and to induce private investments; advantages of the sector may be explained, necessary incitement may be provided, autocratic requirements may be reduced, some governmentally owned investments may be done as headers, leasing type alternatives may be encouraged. On the other hand it is seen that some agencies in Turkey working as representatives of some world cruise firms. Setur, Cruise Rep, Golden Bay Tour, Royal Cruises are the examples of these agents. This means, world cruise sector trying to activate Turkish cruise customer potential. Furthermore, Turkish labor that work abroad and visit Turkey annually can also be considered as potential. They are still transported by Greek ships.

It is believed that, planned actions taken for improvement of cruise tourism will serve Turkey's product differentiation and revenue expansion policies and will provide opportunities for harmony and competition among world cruise markets.

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