

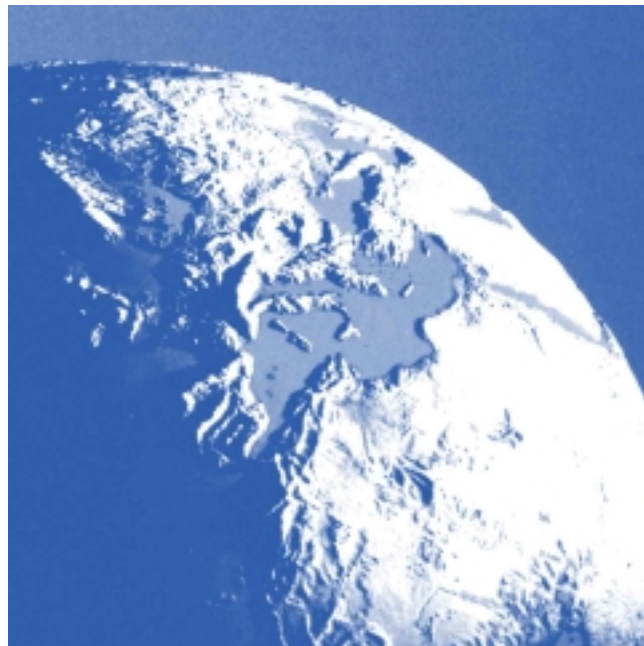


« *Livre blanc* »
Tourisme et développement durable en Méditerranée

« *White paper* »
Tourism and sustainable development in the Mediterranean region

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**Tourism and Sustainable Development
in the Mediterranean Region
Turkey**

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WHITE PAPER
TOURISM AND SUSTAINABLE DEVELOPMENT
IN THE MEDITERRANEAN REGION
TURKEY

CAPTER1:

MAKING TOURISM A FORCE FOR ECONOMIC DEVELOPMENT IN THE MEDITERRANEAN REGION

Maintaining the mediterranean region's position in the world or the flows of international tourism

OBSERVATION

Nearly 400 million people live in the 18 countries bordering the Mediterranean. Every year, during the period between June and September, roughly 180-200 million tourists, coming mostly from central and northern European countries join them. They together, certainly increase the pressure mainly on the coastal ecosystems and local cultures in a variety of ways.

Tourism in general, has already become the most remarkable civil economic and social phenomena of the last century. Number of the tourists traveling in the world reached nearly 700 million at the turn of the Millenium, whereas the international tourism receipts exceeded US\$ 500 billion, translating into receipts per arrival around US\$ 700. The travel and tourism industry employs nearly 150 million workers-one in fifteen workers worldwide. Turism today is the bigger industry than the auto, steel, electronics, or agricultural industries. Although the growth rate is slowing, on the basis of international tourism forecasts conducted by the World Tourism Organization, nearly 4% average annual growth is expected in the first decade of 21. century..

But unfortunately, at global as well as regional and local levels, tourism is an asymmetric phenomena as far as the distribution of the benefits is concerned. World's Top 10 Tourism Destinations and Earners list prepared by WTO includes three Mediterranean countries, Spain, France and Italy (Figure 1). This top 10 countries receive more than 60% of the tourists and the incomes. These three important Mediterranean destinations receive 25 % of the arrivals and 20 % of the earnings generated by the tourism industry worldwide. For instance, France, Spain and Italy together host roughly 170 million tourist per year (% 80) out of 217 million tourists visiting the Mediterranean-rim countries and make (US\$ 93 billion) 75 % of the earnings (US\$ 125 billion) generated by the tourism industry of the region.

Within this perspective, we may conclude that the tourism is concentrated around northwest Europe within a relatively narrow band of Mediterranean coastline where the first tourism activities were practiced some 60 years ago. That is the reason why, generalizations may not reflect the real picture of the tourism around mediterranean region. As seen in figure 2, as the share of the Mediterranean countries in the world

tourism arrivals is slowly decreasing, the share of Turkey in the Mediterranean basin shows a slow increase.

Figure 1: World Toplam's Top 10 Tourism Destinations and Earners, 2000 (WTO)

International Tourist Arrivals (million)	Country		International Tourism Receipts (US\$ billion)
73.0	France	USA	74.4
51.8	Spain	Spain	32.9
48.5	USA	France	31.7
36.1	Italy	Italy	28.4
27.0	China	UK	21.0
25.7	UK	Germany	16.8
19.6	Canada	China	14.1
19.2	Mexico	Austria	11.1
18.5	Russian Fed.	Canada	10.0
18.0	Poland	Greece	8.8
337.4	Total		249.2
664	World		455
216	Mediterranean		125

Figure 2: International tourist arrivals and receipts, as compared with Mediterranean region and Turkey

Years	Turkey		Mediterranean		Med. /Turkey		Med. / World	
	Arrivals (000)	Receipts (US\$ 000 000)	Arrivals (000)	Receipts (US\$ 000 000)	Arrivals %	Receipts %	Arrivals %	Receipts %
1970	724	51	58 085	5 593	0.012	0.009	37.0	32.2
1975	1 540	200	77 582	12 430	0.019	0.016	36.2	30.5
1980	1 288	326	92 942	29 868	0.013	0.011	33.6	28.4
1985	2 614	1 482	116 367	33 009	0.022	0.044	36.2	28.0
1990	5 389	2 705	153 443	74 602	0.035	0.036	33.2	27.7
1995	7 726	4 957	162 677	106 158	0.047	0.046	29.7	26.1
2000	11 569	7 636	216 807	125 107	0.043	0.061	31.1	27.5

Tourism demand fluctuates in accordance with many different factors of diversifying characters, such as the business cycle of the area from which tourists come, tourists' changing perceptions, fashion, violence, political disturbance etc at regional or local levels. For instance, the golf crisis of 15 August 1990 had a very dramatic impact on Turkish tourism market. The rate of cancellations reached the magnitude of 40-90% within a month.

Clearly then, available statistical data that purport to measure the impacts of tourism or to understand the trends of tourism give only very limited idea of the role of the tourism in the development proces. At global level, the relative share of the Mediterranean-rim countries is shrinking but at regional level it is the other way round.

Not only the share of Mediterranean is eroding, but Europe's growth rate in terms of international tourist arrivals and receipts is also eroding for about a decade or two. Europe in general is currently losing market share to new tourism destination regions in the Eastern Asia/Pacific region (figure 3). European countries that top the list as tourism destinations are subject to strong competition from China, Korea, Thailand,

Japan, Hong Kong, and Singapore. WTO's projections for 2020 suggest that the China is going to be at top of the list with 137 million international arrivals (8.6% of world total).

Figure 3: International tourist arrivals

	1993		% variation 1993/1992	
	Arrivals*	Revenues**	Arrivals	Revenues
World	500	324 080	+ 3.8%	4 9.3%
Africa	17.9	6 364	+ 2.0%	+ 8.7%
Americas	106.5	95 545	+ 5.6%	+ 14.3%
East Asia & Pacific	68.5	52 587	+ 11.8%	+ 15.2%
Europe	296.5	162 573	+ 2.1%	+ 5.7%
Middle east	7.2	4 996	- 8.5%	- 7.4%
South Asia	3.4	2 015	- 1.4%	- 2.9%
* millions	** US\$ millions		WTO 1994	

The shift in favoured tourism destinations –from developed to developing countries- indicates that international tourism could become a means of redistributing the wealth of tourism from “north to south”. Keeping these radical changes and shifts in mind, we have to try very hard to find out the real reasons which shape current tourism activities and expectations by all means.

Mediterranean basin possesses a great diversity of resources –natural and cultural- to offer to the tourists of new generation. What is needed is a new tourism strategy which focuses on the cultural and natural resources rather than famous cities and sun-bathing. This strategy should also give the priority to establishing partnerships or to joint initiatives between developed and developing countries of the Mediterranean basin in order to produce new tourism products fitting to the current expectations.

MAJOR PROBLEMS

The top tourism destinations of Europe in general and Mediterranean in particular are overused and lost their charm for two major reasons. Firstly, they are the oldest and wellknown destinations. Secondly, they can not meet the expectations of the new generation tourists.

Few years before and after 1970 can be considered as an important landmark for tourism industry which have caused to dramatic structural changes. The general profile of the tourists before 1970 had a rural character and composed mainly of the employees working for the industry. But on the contrary, the majority of the tourists after 1970 were real city dwellers (born and grown up in the cities) and employed by ever increasing proportions by the service sector. As the living and working environments are shifting from rural oriented to urban oriented and from factories to offices, the main target of tourism had also to shift from relaxing bodies (muscles) to relaxing brains (mental), at the same time. Consequently, cities (urban ecosystems) and 3S (sea, sun, sand) gradually lost their charm while rural areas (natural ecosystems), exotic cultures, and sporting activities are getting more popular.

1970 constitute also a turning point in environmental awareness. Since then, there is no question that the tourism market is becoming “greener” or more environmentally sensitive, both in terms of awareness and in the desire to contribute through its efforts

towards a more sensitive approach to numerous activities and purchases. The demand in the tourism marketplace for a range of environmentally sensitive products, programs, education, and of course labeling is growing fast. Blue flag award, energy and water saving programs, “green rooms” are some of the examples carried out by the tourism establishments. “Green Pine”, “Green Anchor”, and “green Dolphin” awards are given to the environmentally friendly hotels, marinas and yachts respectively who put in to practice the listed standards controlled by the Ministry of Tourism.

It has long been recognised that tourism has the potential to act as a force to conserve natural resources. If properly managed, resource conservation and tourism development can be compatible and complementary. They can benefit greatly from each other and they should be marketing partners. For instance, Dalyan/Turkey owes its fame to the conservation of sea turtles.

Nature-based tourism which includes ecotourism, became a rapidly, if not the fastest, growing sector of the tourism economy. This sort of responsible tourism enormously expands the area on which tourism activities are taking place towards both sides of the coastline, beyond the mountains on one end and to the horizons of the oceans, on the other. Nature-based tourism includes very diversifying activities such as, white-water rafting, trekking, countryside biking, vegetation and wildlife, local cultures, diving, surfing, fishing, mountaineering, etc.

Excluding a few developed country, Mediterranean basin as a whole, is the land of unstability. Being very sensitive to any kind of unstability, tourism, particularly ecotourism, has the potential to play a key role in solving the unstability problem and bringing peace to the region.

The “Ecotourism Year 2002” will certainly help to draw the attention of the tourism investors of the developing countries onto the ecotourism practices without being prepared for it. This may cause to the destruction of the potentials they have.

POSSIBLE ANSWERS OR STEPS TO TAKE

The famous 3S tourism and mass tourism as a derivate of it, has already started to decline. The tourism turns to be nature and exotic culture oriented at a relatively high speed. As a consequence of this conversion, the year 2002 has been declared as the “Year of Ecotourism” by the United Nations. Ecotourism is simply defined as a responsible travel to natural areas which conserves the environment and improves the welfare of local people, realizing that the nature can not be saved at the expence of local people. Mediterranean is certainly the richest region of the world as far as the ecotourism resources are concerned. The tourism strategy of the whole region should essentially be based on ecotourism which will underscore the differences (cultural, natural, social, etc.) rather than similarities and be promoted as such. This extensive strategy can help to the recovery of the Mediterranean’s tourism and at the same time, can bring back the peace between man and nature, man and culture, and man and man which was destroyed earlier.

Ecotourism can relieve the pressure on highly wisited costal zones and reduce seasonality and vulnerability of the tourism sector. A tipical ecotourism facility has

generally a limited size which may preclude the participation of major tourism establishments. One approach to overcome this particular problem may be the development of strategic partnerships between large urban or beachfront hotels and small-scale ecotourism facilities. This **satellite** relationship with larger hotels may benefit both the ecotourism operator with a steady flow of guests and the larger hotel with the possibility of extended and/or repeat stays by guests. This approach looks very appropriate at the very early stages of the introduction of ecotourism in the region.

Within this concept, every individual Mediterranean country has an important role to play. The macro tourism strategy and policy of the Mediterranean region is to be developed and monitored by the participation of the whole countries.

PROBLEMS SELDOM IF EVER TACKLED

In reality, there are roughly two different Mediterraneans; northwest Mediterranean (Spain on the northwest, Greece on the northeast) and northeastern and southwestern Mediterranean (Turkey on the northeast and Morocco on the southwest). The countries of the former are better developed and belong to the Christian culture, the countries of the latter are generally developing and belong to Islamic and Jewish culture. The population growth rate and the structure, prosperity, literacy, etc. differs reasonably between these two sub-regions. Collaboration in tourism operations in general and ecotourism in particular may act as to fill the gap between these two sub-regions.

MAIN PLAYERS

The main players are, local population, public authorities, tourist business, NGOs dealing with tourism and conservation, planners

A right to develop and an evaluation to be controlled or the flows of domestic tourism

OBSERVATION

Generally speaking, tourism as modern socio-economic phenomenon is considered to be pursued in leisure time and started only in the 20th century with the development of capitalism associated with the industrial revolution. The industrial revolution brought about a significant intensification of labor and simultaneously a significant increase of productivity of labour. After some time, it has been realised that the nonstop intensive labor reduces the productivity of the employee significantly. So the working time has decreased slowly and gradually and paid holidays had to be given for the sake of productivity. Here are some average weekly working hours (USA); 1840, 84; 1900, 60; 1950, 45; 1985, 35.

Contrary to the general acceptance, tourism originates from an absolute necessity of putting back the reduced productivity of the labor, not from a discretionary leisure time, raised living standard or so. This is a very important point in understanding the major function of the domestic or international tourism activities. The time devoted for tourism is an integral part of labor.

Based on the statistics of WTO, almost in all regions of the world, the biggest share of the tourists originate from their own region. Europe is the region that depends the most on intraregional travel, with 86% of arrivals originating from Europe itself.

Figure 4: International Tourist Arrivals by Generating Region and Destination Region –1999

Region	World 380 186 000	Europe 328 145 000
Northern Europe	43 615 000	32 415 000
Western Europe	135 750 000	112 533 000
Central/Eastern Europe	72 823 000	66 160 000
Southern Europe*	116 359 000	107 598 000
East Mediterranean Europe**	11 639 000	9 439 000

* Albania, Bosnia Herzg, Croatia, Former Yug. Rep. Macedonia, Greece, Italy, Malta, Portugal, Slovenia, Spain, Yugoslavia

** Cyprus, Israel, Turkey

Within the Mediterranean basin countries (southern and east Mediterranean Europe) the share of intraregional travel is even higher, 91%. The majority of outbound tourist, 5 %, are coming from Americas. Practically, on subregional level, domestic tourism is a dominating character within the Mediterranean basin.

In 2000, the number of arrivals in the licenced tourist establishment has been realized as 15 569 978 in total, and the share of foreigners 43.5 % and citizens' is 55.6 %. Within these figures, the total number of nights spent has been realized as 44 986 605 nights, representing 66.4% of foreign visitors' share and 36.6 of domestic visitors' share respectively. The average length of touristic stays appeared as 4 nights for foreign visitors and two nights for domestic visitors.

Figure 5: Number of Arrivals and Nights Spent at the Accommodation Establishments Certified by the Ministry of Tourism (000 000)

Number of Arrivals

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Citizen	3.6	3.8	4.1	4.8.	4.7	5.0	5.8	7.7	7.7	7.9	8.9
Foreign	3.9	2.4	3.7	4.1	3.7	4.6	6.4	9.4	7.6	4.8	6.8

Nights Spent

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Citizen	6.9	8.0	9.2	9.7	9.6	9.7	11.5	14.9	15.5	16.8	16.5
Foreign	13.3	9.7	16.8	17.1	16.3	18.5	25.5	36.2	30.4	20.4	28.5

The share of Mediterranean in the number of arrivals comprises 50% (26 % Mediterranean, 24% Aegean) of the total where as the nights spent comprises 70% (45% Mediterranean, 25 % Aegean).

Campings have been the most popular for domestic visitors in particular as the average length of stay was the longest as 4 nights, while for holiday village taking the second as 3.5 nights and for tourism complex the third as 2.7 nights on average.

As being a Mediterranean country, domestic tourism looks very important, although roughly 50% of the population is still occupied by the agricultural sector. A large portion of the domestic visitors (25.5%) prefer thermal resorts for the accommodation

while inns taking the rate at 23.5% and 1 star hotels at 21.6%. On the contrary foreigners prefer tourism complex (48.3%), holiday villages (34.4%) and five star hotels (33%).

Since the hotel (3-5 star), and holiday village rates are relatively too expensive for the local people, and those establishments are lined along the mediterranean costline side by side, domestic visitors are isolated from the tourism and also from the mediterranean which causes serious social problems.

As a consequence of this isolation, thousands of thousands second houses were built along the Mediterranean costline and around the touristic establishments. As clearly seen in the figure 6, second houses covers more than 2 times the area of touristic establishment. This intensive second house phenomenon has a very severe negative impact on landscape, environment and tourism quality.

Figure 6: The Land Use Rates Around Mediterranean

Mediterranean Provinces	Settlement	Urban		Second houses		Tourism	
		Ha	%	Ha	%	Ha	%
Balıkesir	2596	720	27.7	1695	65.3	181	7.0
Izmir	4675	1271	27.2	3199	68.4	205	4.4
Aydın	1414	383	27.1	911	64.4	120	8.5
Mugla	6423	2819	43.9	2548	39.7	1056	16.4
Antalya	13143	10067	76.6	595	4.5	24.81	18.9
Total	28251	15260	54.0	8948	31.7	4043	14.3

MAJOR PROBLEMS

The birth day of Turkish tourism industry can be considered as 1980. At this time, there were sufficient amount of information, experiences and data available compiled by the earlier tourism countries, such as France, Spain, Italy and even Greece. Turkish tourism had the chance to make use of these resources of information, but unfortunately she was not so successful. Politicians, investors, planners all concentrated only on foreign tourists targeting to bring in as much as tourist and foreign currency. Locals were omitted and in the end isolated.

Despite this fact, domestic tourism developed steadily and reached to nearly 9 million arrivals in 2000. But at the same time, in the lack of land use regulations second house building along the Mediterranean coast became the major rival to the touristic establishments creating severe negative impacts on environmental quality.

Nearly 90 % of domestic tourism is practiced on the coasts of Mediterranean, but the data collection for domestic movements is not good enough and reliable. It is observed that there is a growing tendency to travel inland destinations, to mountains, lakes, rural landscapes, villages, etc. but is not well documented. As the number of visitors to these new destinations increases, the risk of destruction increases too. It looks obvious that the mistakes Turkey did on his coastlines will be repeated for her inland areas as well. There we need urgent regulations of all types.

Another important issue is the deterioration of the rural resources suitable for ecotourism or nature-based tourism. The illegal and uncontrolled spread of the tourism investments-mostly small scaled- have already started to effect the rural ecosystems.

POSSIBLE ANSWERS OR STEPS TO TAKE

Turkey is an Islamic country having two long religious holidays, one for 3 and the other for 4 days, during which the domestic tourism is activated. In addition to many more, the semester holiday for the schools is another peak holiday time. These activities are not clearly indicated or documented in the statistical records of the Ministry of Tourism. What is needed is a standard format for collecting comparable data about the flow of domestic tourism activities suitable for Mediterranean countries.

To promote the domestic tourism, the local people should be given the opportunity to get in touch with the international tourism. The social (also physical) and economic isolation of the locals from international tourism hinder very deeply the domestic tourism because of the high prices.

As integral parts of ecotourism, satellite tourism and rural tourism should be properly defined and the local people should be encouraged to invest through some credit and tax incentives on these fields. This encouragement is to be supported by an intensive and target oriented education programmes.

Franchisers' meetings, congress, etc. are also important means of domestic tourism.

PROBLEMS SELDOM IF EVER TACKLED

Although there is no proper data available, participation of the young generations to domestic tourism is very low. Students should be given the chance to discover firstly their own country and then the Mediterranean countries through some travel and accommodation incentives, particularly for low seasons. This program should be expanded to include the third generation (retired people) who have time.

MAIN PLAYERS

Main players in domestic tourism are the rural population, students, companies, public authorities, tourist business

Improving and perpetuating the economic importance of tourism or the flows of international tourism receipts

OBSERVATION

International tourism generated in 2000 worldwide estimated receipts of US\$ 476 billion, a growth of 4.5 % over the previous year (455 billion). Worldwide average receipt per arrival amounted in 2000 to US\$ 680. The highest receipt per arrival are found in Americas US\$ 1060 followed by South Asia US\$ 800 and East Asia US\$ 740. Europe is in the 4. line with US\$ 575 which is nearly 20 % less than the world average. Countries of the Mediterranean basin is also under the world average, US\$ 640 per arrival.

Figure 7: International Tourist arrivals and tourism receipts, Mediterranean countries, 2000

		1990	1995	1998	1999	2000
Europe	Arrival	282.7	323.4	373.7	380.2	403.3
	Receipt	143.2	212.8	231.7	233.1	231.5
Arrivals		96.0	103.2	123.6	128.0	140.8
Receipts		50.5	75.5	87.3	89.2	90.1
Average		526	731	706	696	640

Since 1995, a gradual decline is clearly observed in the average receipt per capita for the Mediterranean countries as a whole.

The shrinking of Mediterranean tourism may be explained that current tourism is characterized by strong overall development and by a growing tendency for tourists to visit new destinations, together with tourism product diversification and increasing competition between destinations. Being the birth place of tourism, Mediterranean has to renew herself. So far, France, Spain and Italy were the leading countries of the region. But now, new, less known but attractive Mediterranean countries should be promoted to support the overall tourism potential of the region. It looks that the individuality is over, and collaboration and partnership is emerging. Mediterranean has the potential to overcome this problem and possesses diversing natural and cultural resources to compete with the rivals.

Half a century ago, in 1950s, tourism was practiced either in Europe or in Americas. Among the top 15 countries of 1950 were 11 European and 4 American (US, Canada, Argentina, Mexico) countries. In 1990 the number of European countries dropped down to 10 and American to 2 and two Asian countries took the stage, China and Malaysia. In the year 2000 there were again 10 European countries including Russian Federation in the list and 3 American and 2 Asian countries.

Figure 8: World's Top 15 Destinations by International Tourist Arrivals

Rank	1950	1970	1990	2000
1	US	Italy	France	France
2	Canada	Canada	US	US
3	Italy	France	Spain	Spain
4	France	Spain	Italy	Italy
5	Switzerland	US	Hungary	China
6	Ireland	Austria	Austria	UK
7	Austria	Germany	UK	Russian Federation
8	Spain	Switzerland	Mexico	Mexico
9	Germany	Yugoslavia	Germany	Canada
10	UK	UK	Canada	Germany
11	Norway	Hungary	Switzerland	Austria
12	Argentina	Czechoslovakia	China	Poland
13	Mexico	Belgium	Greece	Hungary
14	Netherlands	Bulgaria	Portugal	Hong Kong
15	Denmark	Romania	Malasia	Greece
	Others	Others	Others	Others
Total	25 million	116 million	457 million	699 million

Taking into account the figure 3, we may conclude that the tourism is shifting from Europe to new, unknown East Asian and the Pacific countries where exotic culture and nature prevails. This shift marks also the transition from city centered tourism to rural and culture centered tourism. Within the Europe, it is the big urban centers,

Vienna, Paris, Rome, London, Amsterdam, Milan, of the Western European countries that generate the most tourists.

Turkey enters the list of “World’s Top 15 Tourism Earners” in the year 2000, a total receipt of US\$ 7.6 billion realising a tremendous growth rate (46.8 %) as compared with the figure of the previous year. It is quite noteworthy that as the average arrivals of Italy, Spain and France increasing, the average receipts are decreasing.

Figure 9: World’s Top 15 Tourism Earners.

Rank	Countries	International Tourism		% Change 2000/1999	Market share (%) 2000
		Receipts (US\$ billion)			
		1999	2000		
1	US	74.9	85.2	13.7	17.9
2	Spain	32.4	31.0	-4.3	6.5
3	France	32.5	29.9	-5.1	6.3
4	Italy	28.4	27.4	-3.2	5.8
5	UK	20.2	19.5	-3.4	4.1
6	Germany	16.7	17.8	6.5	3.7
7	China	14.1	16.2	15.1	3.4
8	Austria	12.5	11.4	-8.7	2.4
9	Canada	10.2	10.8	5.9	2.3
10	Greece	8.8	9.2	5.0	1.9
11	Australia	8.0	8.4	5.3	1.8
12	Mexico	7.2	8.3	14.8	1.7
13	Hong Kong	7.2	7.9	9.4	1.7
14	Turkey	5.2	7.6	46.8	1.6
15	Russian Federation	7.5	-	-	-

Figure 10: Balance of Tourism Receipts-Expenditure and the Average Expenditure Per Person by Years

Year	Receipts US\$ 000	International Arrivals	Average receipt per arrival \$	Expenditure US\$ 000	Citizens Traveling abroad	Expenditure per citizen \$	Balance US\$ 000
1980	326 654	1 288 060	253.6	114 738	1 794 808	63.9	211 916
1985	1 482 000	2 614 924	566.7	323 600	1 806 163	179.2	1 158 400
1990	3 225 000	5 389 308	621.3	520 000	2 917 118	178.3	2 705 000
1995	4 957 000	7 726 886	684.0	912 000	3 981 391	229.1	4 045 000
2000	7 636 000	10 428 153	764.3	1 711 000	5 284 336	323.8	5 925 000

Within two decades, Turkish tourism industry has provided substantial increase in international arrivals (8 times), receipts (23 times), and in average receipt per arrival (3 times).

The net income of Turkish tourism business is about US\$ 6 billion/ year (28 times bigger than the amount of 1980), excluding the indirect contributions and employment provided, in the year 2000.

These figures prove that the tourism is an important financial resource generating sector of the country. Table 11 summarizes the share of tourism in Gross National Product (GNP), foreign exchange and export revenues.

Figure 11: Share of Tourism in GNP, Foreign Exchange and Export Revenues by Years

Years	GNP US\$ illion	Total Foreign exchange revenue US\$ billion	Comodity export US\$ billion	Tourism receipts US\$ billion	Tourism receipts/ GNP	Tourism receipts/ total foreign exchange revenue	Tourism receipts/ commodity exports
1991	150	28.1	13.6	2.7	1.8	9.6	19.8
1992	178	29.4	14.7	3.6	2.3	12.2	24.5
1993	172	31.2	15.3	4.0	2.3	12.8	26.1
1994	131	33.2	18.1	4.3	3.3	13.0	23.8
1995	166	42.6	21.6	5.0	3.0	11.7	23.1
1996	184	51.5	23.2	5.6	3.0	10.9	24.1
1997	194	58.8	26.3	7.0	3.6	11.9	26.6
1998	204	62.7	27.0	7.2	3.5	11.5	26.7
1999	187	52.9	26.6	5.2	2.8	9.8	19.5
2000	202	58.0	27.3	7.6	3.8	13.1	27.8

Tourism receipts constitute 4% of the GNP, 13% of the foreign exchange revenue, and 28% of the comodity exports.

Tourism creates considerable added value and has close trade relations with 38 different sectors such as, food, beverage, banking and insurance, energy, textile, etc. The net tourism receipts cover nearly 40% of the foreign trade deficit.

MAJOR PROBLEMS

Tourism is one of the most vulnerable sector. Anatolia, the present Turkey is surrounded with long lasting problems, such as midleeast (Iraq, Israel-Palestine). For instance the Gulf crises in 1990-1991 has caused considerable drop either in internatonal arrivals (40-90 %) or in international receipts, excluding indirect negative impacts on the whole economy which is estimated as about US\$30-40 billion. Anatolia is also a land of natural disasters, particularly of earthquakes.

The violance that Turkey experienced in 1999 caused a series of cancelations; Germany 27.5%, UK 15.2%, US 9.0%, Austria,8.2%, Holland 6.4%, and France 5.9%. The total decrease in the number of arrivals was 23.23% compared with the 1998. Earthquake which took place in the same year had also a negative impact.

Turkish economy is dependent upon tourism. The economic crisis broke out at the beginnig of 2001 has clearly shown this dependency. The economies of the provinces located on the Mediterranean coastline, such as Antalya and Mugla, are 80-90% tourism dependent.

A typical aspect which makes Turkish tourism more vulnerable to crises of any type is the character of tourism. Turkish tourism strategy and policy is hotel centered.

POSSIBLE ANSWERS OR STEPS TO TAKE

The countries around the mediterranean may work on a program in order to develop a concept and strategy of crise resistant tourism. This does not mean that the negative impacts of crises can be stoped entirely, but be reduced to managable levels. Safety is becomming more and more costly.

Ecotourism which gives the priority to the local resources and values may play a key role in increasing and equitable distribution of in-puts generated by the tourism sector. It may also help to the conservation of natural and cultural resources. Satellite tourism can act as mean to prepare base for ecotourism.

International standarts such as Blue Flag Campaign, Ecolabels, may help to increase the international arrivals.

Because of the sea currents carrying the pollutions along the costlines, winds and rivers the polluted air and water from one country to another, we need to create an awareness that there is only one Mediterranean for all of us.

Mass tourism is a reality. Individual tourism is also. These two are entirely different and need to be taken up separetly. In tutkey many areas suitable for individual tourism practices open up to mass tourism congregation.

Intensive studies on tourism demad should be carried out in order to understand the structure of supply and produce the right supply for maximun benefit.

PROBLEMS SELDOM IF EVER TACKLED

Tourism is very complex industry and has multydirectional relations with numerous sectors. This copmlexity makes the analyses of tourism in-puts and out-puts quite difficult. New and effective metodologies are to be developed to understand the real relations and interdependencies of tourism with other sectors.

MAIN PLAYERS

Tourists, tourism bussiness, goverment organisations, local goverments, NGOs, media

Developing the accomodation capacity, a condition for increased tourism, or the challenge of controing the rate of the phenomon

OBSERVATION

It is generally thought that accomodation forms the backbone of tourism Industry, but it is not. Nobody decides to go to any place to stay overnight in one of the hotels. Tourism desicion is made not on the basis of hotel but on the basis of touristic product which attracts the attention of the person involved such as, sandy beach, a tower, a bridge, a city, a bird specis, a temple, a performence, a spor activity, etc. Travel and accomodation arrangements are built over this basement, over this desicion. We have to shift from hotel centered tourism approach to authentis produc centered approach. Otherwise, clientele can only be attracted by lowered hotel rates which is what happening in Turkey. The figures below represents this approach.

Figure 12: Accomodation Establishments Licenced by the Tourism Ministry

Years	Investment Licenced		Operation Licenced	
	Establishment	Beds	Establishment	Beds
1991	1 987	331 711	1 404	200 678
1992	1 938	309 139	1 498	219 940
1993	1 788	276 037	1 581	235 238
1994	1 578	240 932	1 729	265 136
1995	1 334	202 483	1 793	286 463
1996	1 309	202 631	1 866	301 524
1997	1 402	236 632	1 933	313 298
1998	1 365	249 125	1 954	314 215
1999	1 311	245 543	1 907	319 313
2000	1 300	243 744	1 824	325 168

Figure 13: Disřtribution of Licenced Accomodation Establishements by Main Tourism Provinces 2000

Province	Investmewnt Licenced				Operation Licenced			
	Establishment	%	Beds	%	Establishment	%	Beds	%
Istanbul	82	6.3	25 319	10.4	242	13.3	42 856	13.2
Antalya*	326	25.1	73 742	30.2	420	23.0	114 871	35.3
Mugla*	358	27.5	62 041	25.4	275	15.1	48 239	14.8
Izmir*	57	4.3	12 964	5.3	139	7.6	22 532	6.9
Aydin*	55	4.2	10 143	4.2	101	5.5	19 135	5.9
Others	422	32.5	59 585	24.5	647	35.5	77.535	23.8
Total	1 300	100.0	243 794	100.0	1 824	100.0	325 168	100.0

• Mediterranean

Figure 14: Distribution of Licenced Accomodation Establishments by Type and Classes 2000

	Class	Investmewnt Licenced		Operation Licenced	
		Establishment	Beds	Establishment	Beds
Hotels	5 Star	73	44 708	118	71 136
	4Star	144	50 524	193	52 894
	3 Star	317	51 644	446	73 871
	2 Star	427	36 618	547	46 566
	1 Star	78	3 744	145	9 081
Holiday Villages	1st Class	49	30 243	69	46 603
	2nd Class	20	7 121	12	4 042
Motels	1st Class	6	338	6	862
	2nd Class	15	609	20	917
Special Licenced		24	999	72	4670
Apart Hotels				38	3 219
Pensions		122	4 109	133	4 460
Campings		10	2 852	10	2 834
Inns		3	220	7	1 153
Golf Facilities		3	2 068	2	910
Tourism complex		4	7 517	3	1 451
Training Facilities		5	759	3	499
Total		1 300	243 793	1 824	325 168

The total bed numbers of the operation and investment licenced establishments was only 54 226 (28 354 +25 872) in 1970 and 55 250 (28 992+26 288) in 1980. Between 1970 and 2000, in 30 years time the number of the beds increase 11 folds.

Figure 14: The Accupancy Rates

Years	Foreigner	Domestic	Total
1990	31.7	16.4	48.1
1991	20.6	17.0	37.6
1992	32.2	17.6	49.8
1993	29.3	16.6	45.9
1994	24.6	14.5	39.1
1995	30.8	16.1	46.9
1996	35.3	15.9	51.2
1997	38.6	16.0	54.6
1998	30.6	15.6	46.2
1999	20.4	16.7	37.1
2000	23.3	13.5	36.8

MAJOR PROBLEMS

As the figures given in tabels above the very fast development in accomodation capacity has brought Turkish tourism sector into some serious problems, such as, inadequate infrastructure, self competition, environment degredation, enhanced urbanization and second house construction, cultural erosions, etc.

Very fragile and untouched nature reserves given to the use of tourism sector without considering carrying capacities. Araouna Antalya even the allovable carrying capacity of some beaches exceed. Despite of this fact, new accomodation establishments are built and even planned.

Increased population of the area increased the number of forest fires.

POSSIBLE ANSWERS OR STEPS TO TAKE

Some parts of Mediterranean coast of Turkey, such as Belek, Southern Antalya-Kemer were planed tor tourism develoments. But later, throuh some political pressures the decisions put by the planner have been changed and the capacities increased. As the solitary coastlines are converted into crowded urban tourism centers, the receipts fell down at the same pace.

First thing to be done is to eveluate, understand and to convince the stakeholders on the real value of the natural or cultural resource to be used for touristic purposes. Conservation and participation can grow on this understanding.

PROBLEMS SELDOM IF EVER TACKLED

MAIN PLAYERS

Tourism bussines, local and governmental authorities, related stakeholders, NGOs

MAKING TOURISM A FORCE FOR SOCIAL AND HUMAN DEVELOPMENT IN THE MEDITERRANEAN REGION

Acting for a better distribution of the tourist flows in the Mediterranean basin

OBSERVATION

As explained before, the asymmetric structure of tourism around Mediterranean rim countries constitutes the core of the problem. Before increasing the accommodation capacities of the southern or eastern Mediterranean countries, the potential authentic tourism resources and values should be studied and then produced and marketed as touristic products. Accommodation capacity should be based on the carrying capacity of the touristic product.

Tourism is not an economic activity controlled and managed by only the managers of hotel, travel, and transport sectors, it is multisectoral activity including tourguides, travel agencies, farmers, manufacturers, airlines, etc.

Inspection of the figures given above, clearly shows that the distribution of tourism receipts is not well balanced. Here again, we have to refer to ecotourism for remedying this problem.

MAJOR PROBLEMS

In the countries like Turkey, tourism has created a sort of isolation between local people and tourists, between local people and Mediterranean for some economic and social reasons as mentioned before. We may call this physical or social isolation. The fast increase in the number of beds forced the hotel managers to lower the rates in order to fill their hotels. As an extension of this policy, "all inclusive" has been introduced into the market. It seems that, all inclusive is going to create another but more serious problem, economic isolation. We may find some analogies between "all inclusive" and 11 September violence.

One of the major aim of tourism is to establish peace between different countries and cultures, between man and nature. This can only be achieved by an equitable distribution of the in-put generated through tourism activities. Equitable distribution of touristic in-put, is going to feed tourism in return.

POSSIBLE ANSWERS OR STEPS TO TAKE

The promotion of Egypt is a good and closer example for selling Mediterranean.

Establishment of partnerships among culturally and naturally different countries can be very effective in selling Mediterranean. This may lead the countries for larger partnerships.

Mediterranean is to be used as one of the main transportation tool which may facilitate the partnerships between northern and southern Mediterranean.

PROBLEMS SELDOM IF EVER TACKLED

Not limiting the arrivals of north western countries, but trying to find ways to attract these real tourists to visit the other parts or other countries of the Mediterranean.

A training program on ecotourism and rural tourism may help to the introduction of new tourism destinations and products followed by small, targeted financial aids.

MAIN PLAYERS

Tourists, tour operators, travel agent, local and governmental authorities.

Optimising tourism's positive impact and limiting its negative impact on society

OBSERVATION

This a problem encountered mainly northeastern and southern Mediterranean countries. These countries are culturally and economically different than the tourists they generally receive. They blong mainly to islamic culure and the visitor are almost entirely belong to christian culture. They are mostly developing countries but the visitors are mostly comming from developed countries. On one side, tourism helps to an understanding, and appreciation between the countries which also helps to the establishment of peace. But on the other hand, it has a great impact local cultures and behaviors. For instance, in many hotels in Turkey, the world famous Turkish cafe has been replaced by Nescafe, or Turkish Bath replaced by sauna. It is intersting to note that the more than 75 % of the names of the hotels or travel agencies are either English or Geman.

Conversion of local cultural and natural resources into tourism products properly and under control, may contribute to conservation of the resources.

The living costs (housing, dressing, food, transport, etc.) in touristic areas are nearly 15 % more expensive in Antalya. The population of Antalya grew very fast and reached to 550 000 in 2000 which was only 75 000 in 1975. This is an increase of 7 times in 25 years of time. Uncontrolled growth of the cities caused severe social, economic and environmental promblems which then negatively effected the quality of the tourism.

Antalya is considered as the tourism capital of Turkey, and dependent mainly on tourism. Even the effect of a small and un important cris in tourism bussinee is felt by every sector within the city.

It is also interesting to note that the female visitors coming mostly from former Soviet Union countries played an important role on the social structure of certain cities.

In limiting or controlling the negative effects of the tourism, again ecotourism may play an important role if practised properly.

It should not be forgotten that the TV broadcasts have the same or probably more comprehensive impact on the society.

MAJOR PROBLEMS

Notg the tourism but uncontroled or unplaned tourism may have negative impacts on cultural and natural resources. Tourism certainly will keep on growing. So we have to live with it. In certain parts of our lives we are also tourists. The major problem is to bring them together in harmony.

Another important issue is ever increasing speed of the changes, including ones changed by tourism. Speed of change will keep on increasing. Adaptation to change will be one of the major problems of the future societies.

POSSIBLE ANSWERS OR STEPS TO TAKE

The spread of tourism activities over the whole country and equitable distribution of the in-comes generated by tourism sector has a key role in optimising tourism's impact.

Preparation of guidelines for the participants of the tourism business.

MAIN PLAYERS

Tour operators, local and governmental authorities, local people, tourism companies.

Participating in social and human development by promoting stable, quality jobs

OBSERVATION

Tourism is labour-intensive and partly seasonal activity. Many person are employed directly by tourism establishments, such as travel agencies, hotels, restorants, etc. but many more are employed in directly by the tourism activity. Because of this complex structure the real numbers or the data is difficult to produce.

For Turkey, the total number of the jobs created by tourism is estimated to be 1 job for every 35-40 arrivals, which means nearly 300 000 for the year 2000, and 215 000 for 1999.

MAJOR PROBLEMS

The seasonal character of the tourism business is the major handicap. The qualified or experienced staff are not willing to work for the tourism sector. Another reason is low wages.

The sensitivity of the sector to crises is another point which makes the job unattractive. In the case of crises, many employees are released from their jobs immediately.

POSSIBLE ANSWERS OR STEPS TO TAKE

To make tourism job attractive, tourism should be spread to the whole year. Although the season is quite long (7-8 months) in mediterranean countries, keeping the labour whole year increases the costs.

In search of the fair distribution of tourist revenue

OBSERVATION

Fair distribution of the tourism revenues is a very complex issue and has several aspects. Fair distribution should be accomplished between sending and receiving countries, between developed and developing countries, between international and

national companies. Fare distribution of revenues should also be realised within the country between the different sectors.

It is rather difficult to reach this goal as far as the mass tourism is concerned, mainly because of the sizes of the establishments. But easier for small scale tourism. Ecotourism or rural tourism looks as a good tool to started and gain experiences.

MAJOR PROBLEMS

The market is controlled by a number of large companies.

POSSIBLE ANSWERS OR STEPS TO TAKE

Shifting from hotel centered tourism approach to authentic product centered approach may have an improvig impact. This also means a transfer from mass to individual tourism. Lowering the share of the mass tourism should be accepted as a policy.

Fair distribution of the revenues is resting on the institutional cooperation and participation of the mediterranean countries. Mediterranean is a good and unique product.

PROBLEMS SELDOM IF EVER TACKLED

MAIN PLAYERS

Governments of Mediterranean countries, local tourism companies, banks and international investors

MAKING TOURISM A FORCE FOR PROTECTING AND ENHANCING NATURAL AND CULTURAL HERITAGE

Working for a better distribution of tourist flows to mediterranean coastal regions

OBSERVATION

The figures related to the imbalances in the distribution of tourist flows were given above. Antalya known as the tourism capital of Turkey posses 23 % of the tuoristic establishments and 35.3 % of the beds of the country. 98 % of these establihments and 97 % of the beds are located in a very narrow band (200 meters in width) parallel to coast line. 120 kms to the north of the coastline of Antalya is a district of lakes surrounded by high mountains without almost any touristic activity.

In and around Antalya are seven National Parks of excellent importance, but none is in the servis of tourism.

The economic contribution of tourism to the country causes undervaluing the long term importances of the natural and cultural resources and these resources can easily be sacrificed for short term benefits.

MAJOR PROBLEMS

This imbalance forms the core of many economic and social as well as environmental problems.

Mediterranean is polluted. Still nearly 75 % of the household waste waters discharged into the Mediterranean without any treatment. In Turkey all touristic establishments, having more than 80 beds (40 rooms) have to have a waste water treatment plant. The remainder should have an impenetrable sanitary pit. This is very strictly controlled by the Ministry of Environment. But we still have some serious problems in solid waste disposal.

For the construction of accommodation establishments, sand dunes have been destroyed in many places of Turkey. The nesting beaches of sea turtles occupied by tourists, and the sun bathers and divers frightened the monkseals.

POSSIBLE ANSWERS OR STEPS TO TAKE

Environmental ethic is becoming a reality. We have already accepted and learnt how to share the beaches with sea turtles and the Mediterranean with monk seals. These are promising examples. We have to work on this. Growing environmental awareness and consciousness will compel us, tourists and the tourism investors.

Ecotourism, together with organic farming is again the key:

PROBLEMS SELDOM IF EVER TACKLED

MAIN PLAYERS

Planners and decision makers, tourism sector, locals, local and government authorities.

Fighting the seasonal aspect to improve tourist-flow distribution in time

OBSERVATION

Mediterranean is generally defined as region where there are three springs and one summer. This character of the region may attract the retired people who are available all through the year, through some incentives. Sport or football brings many people to Antalya for about three years. Football teams are coming for training purposes, and the tourists for watching the games.

Mediterranean has the potential to attract the people all through the year. What is needed is a new philosophy and approach in accordance with the demand of the target groups.

Figure 15: International Tourist Arrivals per month, 2000

Months	1999	2000	2001
January	359 045	333 915	359 339
February	371 727	354 487	404 475
March	409 483	435 158	547 057
April	426 558	721 128	871 045
May	691 313	986 376	1 216 246
June	784 642	1 079 148	1 375 955
July	931 895	1 525 718	1 776 067
August	1 079 249	1 419 244	1 597 529
September	876 261	1 368 538	1 436 931
October	800 513	1 178 481	
November	435 790	602 396	
December	320 808	423 564	
Total	7 487 285	10 428 153	9 584 914

MAJOR PROBLEMS

The seasonal aspect is reflected in every activity, such as employment, traffic, trade, noise, pollution, consumption, etc. For instance, the highways are built taking into account the maximum loads, but during the low seasons they are generally in active.

POSSIBLE ANSWERS OR STEPS TO TAKE

The only possible solution to the problems seems to attract the different target groups, retired people, sports teams, students, business meetings by some prize incentives.

PROBLEMS SELDOM IF EVER TACKLED

MAIN PLAYERS

Tourism operators, hotel managers, local people, government authorities.

To promote a creative enhancement of cultural and natural assets

OBSERVATION

Mediterranean is the only region in the world which has its own climate (Mediterranean Climate), its own, vegetation cover (Mediterranean type vegetation), its own food (Mediterranean kitchen), its own culture (Mediterranean culture). Mediterranean is the 6th continent of the world having the richest and oldest collections of human culture, the most diverse natural resources, the most suitable climate for human beings.

For Mediterranean is the name of the sea around which the three continents meet. There are many attractive things for everybody in the region.

MAJOR PROBLEMS

Let Mediterranean be rediscovered.

POSSIBLE ANSWERS OR STEPS TO TAKE

Let Mediterranean be discovered.

PROBLEMS SELDOM IF EVER TACKLED

Diversification of tourism, and spreading the tourism on a much larger space attention to be paid, and measures to be taken for the conservation of these resources.

MAIN PLAYERS

UNESCO, ICOMOS; IUCN, WWF, NGOs, Ministries, locals and local authorities

Controlling the impact of tourist-related transport on the environment

OBSERVATION

The concentrated mobility of the population created a series of problems. Increasing demand and pressure for faster and safer transportation have forced the governments to build highways and airports. Nearly 11 % of the surface of our planet is now covered by asphalt or concrete. The vehicles are polluting environment with their SO₂, CO, and NO and with their noise. They occupy large areas. Parking lots for cars cover more space than the green recreational parks of the cities.

MAJOR PROBLEMS

The emitted gases destroy the cultural heritages as well as nature.

POSSIBLE ANSWERS OR STEPS TO TAKE

As the new areas are planned for tourism purposes, priority should be given to pedestrians and bicyclers.

The efficient use of energy is to be promoted. The touristic establishments, having 126 000 beds in total consuming 171 million KWh saveable energy in vain.

PROBLEMS SELDOM IF EVER TACKLED

MAIN PLAYERS

Ministry of communication, locals and local authorities, national and international transportation institutions

Limiting the denaturing of the coastal space, restoring the natural heritage

OBSERVATION

The touristic establishments, second houses, cities, marinas, powerlines, roads, and harbours destroyed the natural landscape of the Mediterranean coastline.

Figure 16: Marinas Licenced by the Ministry of tourism 2000

	Marinas	Capacity		
		Sea	Land	Total
Investment Licenced	10	1 802	888	2 690
Operation Licenced	15	3 014	1 010	4 024
Total	25	4 816	1 898	6 714

80% of the hotels around Antaya providing their water by pumping out. The gardaning consumes alot of water and chemicals for maintainence. The use of local vegetation lowers the watering and maintenance costs. The use of water saving taps should be encouraged

MAJOR PROBLEMS

Pollutions and man made structures destroy the habitats of certain species in the mediterranean

POSSIBLE ANSWERS OR STEPS TO TAKE

Pomping of the underground water should be controlled. Training courses on environmental issues may help improving the saving programs.

PROBLEMS SELDOM IF EVER TACKLED

MAIN PLAYERS Local and national authorities, hotel managers, investors, planners, land owners

Implementing the environmental management of accomodations, facilities and tourist resorts

OBSERVATION

Tourism creates nopt only income, employment and foreign cyrrency, it also creates severe environmental problems and consume alot. Paralel to the improvement of the environmental awareness, a large portion of the tourists pays attention as he or she sellects the destination. 70 % of the German tourist dont visit the destinations where the environmental quality is destroyed. This tendency among travellers is growing. We have to use this sensitivity for making tourism sektör environmentally friendly.

Touristic establishments can organise environment training programs for their staff. In every department there are something to do for the favour of environment.

Some touristic establishments have started to identify themselves as environmentally friendly hoteles. Some are offering green rooms to the environmentally concious clients. Many of these environmen programs are not costly on the contrary the contribute to the budget of the establishment.

By this way, resources are used efficiently, wastes are minimized, the rate of recycling is increased and incomes are generated. The visitors or the tourist can also participate the programs.

MAJOR PROBLEMS

Mass tourism is wasting and polluting sector. But can be converted into an environmentally friendly shape.

POSSIBLE ANSWERS OR STEPS TO TAKE

Training programs should be developed for tourism activities of any type. This will certainly help in converting the tourism operations into an environmentally friendly shape. This training programs should be crowned with an award.

PROBLEMS SELDOM IF EVER TACKLED

MAIN PLAYERS

Tourist accommodation owners, resort managers, professional organisations