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REVIEW OF CRUISE TOURISM IN THE WORLD AND IN TURKEY, GLOBAL TRENDS AND LOCAL FACTORS AFFECTING CRUISE TOURISM IN TURKEY

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Abstract

Cruise tourism plays an important role in marine tourism all over the world. Having Aegean and Mediterranean coasts and İstanbul which is a center of attraction increases the potential of take a large economical share from cruise tourism industry. However, in recent years, it is seen that Turkey cannot benefit from this potential. Looking at the statistics, the number of passengers visited cruise ports in Turkey increased gradually to the highest level in 2013, but started to decline in 2014 and 2015. Finally the number of cruise passengers decreased more than 70 percent when compared to peak year, 2013 and reached to lowest level since 2004. In this study, state of the cruise tourism industry globally and in Turkey was examined. Global trends and local factors affecting the decline in this sector, which provides significant economic return to our country, have been investigated.

Keywords: Tourism, Marine Tourism, Cruise Tourism, Cruise Ship, Cruise Port

DÜNYADA VE TÜRKİYE'DE KRUVAZİYER TURİZMİNİN İNCELENMESİ, TÜRKİYE'DE KRUVAZİYER TURİZMİNİ ETKİLEYEN KÜRESEL TRENDLER VE YEREL FAKTÖRLER

Özet

Kruvaziyer turizm tüm dünyada deniz turizmi içerisinde önemli rol oynamaktadır. Türkiye'nin Ege Denizi ve Akdeniz kıyıları ile İstanbul gibi bir cazibe merkezine sahip olması kruvaziyer turizm sektöründen ekonomik olarak büyük pay alma potansiyelini arttırmaktadır. Ancak son yıllarda Türkiye'nin bu potansiyelden yararlanamadığı görülmektedir. İstatistiklere bakıldığında, Türkiye'deki kruvaziyer limanlarını ziyaret eden yolcuların sayısının günden güne artarak 2013 yılında tarihin en yüksek seviyesine ulaştığı, ancak 2014 ve 2015 yıllarında düşüş yaşamaya başladığı, daha sonra 2013 yılında zirveye ulaştığı döneme göre kruvaziyer yolcu sayısının yüzde 70 azalarak 2004 yılından bu güne en düşük seviyesine gerilediği görülmektedir. Bu çalışmada kruvaziyer turizm sektörünün dünyadaki ve Türkiye'deki durumu incelenmiştir. Ülkemize önemli ekonomik getiri sağlayabilecek bu sektördeki düşüşü etkileyen küresel eğilimler ve yerel faktörler araştırılmıştır.

Anahtar kelimeler: Turizm, Deniz Turizmi, Kruvaziyer Turizm, Kruvaziyer Gemiler, Kruvaziyer Limanlar

1. INTRODUCTION

In the scope of International Maritime Organization (IMO) there is no specified category for cruise ships and they are classified in passenger ships. IMO (2014) defines passenger ships as a ship carrying more than 12 passengers. But, however both passenger and cruise ships actually carry passengers, there is a significant difference between purposes of these passengers. A passenger ship can be defined as a ship carrying people who only want the transportation service from a point to another. On the other hand, Dilek (2015) defines that a cruise is used to refer to ships with accommodation and certain standards of sizes and comfort conditions which are used for holiday purposes. According to Bülbül (2002), purpose of cruising not to move passengers between two points but to visit various ports

within a specified time frame within a certain period of time and to carry out activities in these ports. Kizielewicz (2013) defines cruise as “a voyage of at least 60 hours by a seagoing vessel, mainly for pleasure. No cargo/rolling stock will be transported but only passengers with tickets that should include accommodation and all meals. The Cruise voyage must include at least two visiting ports apart from the starting and ending port.”

According to World Tourism Organization (2008) tourism is defined as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited. As tourism segments are classified into multifarious categories in the literature, cruise tourism is marked as a rising field of the tourism industry with its astonishing growth rate over the past years, in particular in last two decade (Aslanoğlu and Balakan, 2016). The cruise ship industry has been the fastest growing segment in the travel industry around the world, and since 1980, the average annual growth rate in the number of cruise passengers worldwide has been 8.4%. (Brida and Zapata-Aguirre, 2008). Cruise tourism has been described as the fastest growing segment of the overall global tourism industry. For some areas of the world – the Caribbean, parts of the Mediterranean, Alaska – cruise tourism has become the dominant form of tourism (Clancy, 2017).

2.GLOBAL CRUISE INDUSTRY

Cruise industry continued to be one of the brightest segments of the maritime sector with strong expansion and record-high investments, and the increase in demand has been in recent years. The increase in the number of passengers traveling by cruise ships is an important indicator of the growth in the sector. According to Cruise Lines International Association (CLIA), which was established in 1975 and aims to provide support to industry for safe, secure and healthy environment; in recent years, the number of passengers preferring cruise tourism has showed a stable and remarkable growth reaching 25.8 million in 2017 while it was 17.8 million in 2009 (CLIA, 2018). As shown in Table 1, since 2009, approximately 200 million passengers have travelled by cruise ships and the sector experienced 4.8 percent compound annual growth rate (CAGR). Also according to projections, number of passengers is estimated to increase and reach over 27 million in 2018.

Table 1: Number of cruise passengers by years (CLIA, 2018)

Years	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018 (p)
Number of Passengers (millions)	17,8	19,1	20,5	20,9	21,3	22,3	23,1	24,7	25,8	27,2

When the origins of cruise passengers are examined, it is seen that North America is the region that has most demand for cruise tourism. North America, which provides more than half of the cruise passengers, is followed by Europe with a share of more than 25 percent.

Table 2: Origins of cruise passengers in 2016 (The Florida-Caribbean Cruise Association, 2018)

Origin	Percentage
North America	54,5
Europe	26,0
Asia	9,2
South America	3,5
Oceania	5,2
Middle East/Africa	1,6

As the number of passengers travelled by cruise ships shows the growth in industry, current cruise ship fleet and orderbook for next years also indicates increasing trend. There are more than 50 cruise lines under the membership of CLIA and these companies form more than 95 percent of whole industry (CLIA, 2016). According to data gathered from CLIA, and compiled from official websites of cruise lines, more than 500 ocean and river cruise vessels are currently operating as shown in Table 3. In addition, number of finalized ship orders shows that cruise companies are attempting to meet the increasing demand for cruise tourism. As shown in Table 4, cruise lines have an effort to enlarge their fleet or decrease the average age of their ships and as a result, in the next 3 years more than 60 cruise ships will begin their voyages. A total of 109 cruise ships are expected to be active until 2027. (Cruise Industry News, 2018) When cruise operators are examined, it is seen that major companies leads the industry by merger or acquisition activities. Three major companies; Carnival Cruises, Royal Caribbean and Norwegian Cruise Lines; operate multiple cruise brands under their management. In addition, MSC Cruise Lines, which is privately held and also the second biggest container shipping line in the world, follows these major companies as fourth brand by means of number of cruise ships owned. Approximately 90 percent of the total ocean cruise ship fleet is operated by these four major companies. Due to these companies hold the market power, it can be said that global cruise industry is close to an oligopolistic structure.

Table 3: Number of cruise ships (Drawn by author due to various sources)

Ocean Cruise Ships	256
River Cruise Ships	251
Total	507

Table 4: Orderbook for cruise ships (Cruise Industry News, 2018)

Years	Fixed Cruise Ship Orders
2019	25
2020	20
2021	20
2022	17
2023	9
2024	6
2025	5
2026	5
2027	2

When the demand of passengers who prefer cruise tourism is examined, it is seen that there is no change by years in the regions that have the largest share. As shown in Table 5, the percentage of the Caribbean region in terms of the number of passengers visited has declined from 40,4 percent in 2004 to 35,4 percent in 2017 experiencing 5 per cent decline. However Caribbean is the region that host most cruise passengers among whole cruise destinations. Mediterranean region, in which Turkey is also located, has consistently become the second region by means of number of cruise passengers hosted. But the region experienced 4 percent decline from 2014 to 2017 while percentage of passengers decreased from 19.8 percent to 15.9 percent. Another remarkable point in Table 5 is that Asian and Australian regions are quite popular in recent years. While the total share of these two regions was 3.4 percent in 2008, it reached 10.3 percent in 2014 and 16 percent in 2017. Decreasing passenger rates in the Caribbean and Mediterranean regions and increasing the number of passengers visiting Asia and Australia indicate that destination demands of cruise passengers has showed a notable shift.

Table 5: Percentage of Cruise Destinations by means of passengers hosted
(Aslanoğlu and Balakan, 2016; The Florida-Caribbean Cruise Association, 2018)

	2004	2008	2014	2017
Caribbean	40,4	37,2	37,3	35,4
Mediterranean	12,6	17,5	19,9	15,8
Other Europe	9,8	8,3	11,1	11,3
South America	1,4	2,9	3,3	2,1
Alaska	7,7	7,6	4,5	4,3
Asia	0,5	1,2	4,4	10,4
Australia	0,9	2,2	5,9	6,0

Cruise tourism provides significant economic contribution to the regions where cruise ports are located. The economic contribution of cruise tourism can be classified as direct, indirect and induced impacts. Direct contribution refers to the effect provided by onshore expenditures of cruise passengers and crew or purchases of cruise companies. Indirect impact refers to the spending by directly impacted businesses for those goods and services they require to support cruise industry. Induced contribution is arose from the increased income and expenditures of firms or households who get economic contribution from cruise industry directly and indirectly. (Marksel, Tominc, Bozicnik, 2016)

The direct economic contribution of cruise ships to the ports they visit takes place in three ways; onshore expenditures of cruise passengers, onshore expenditures of crew and purchases of cruise lines as stores and supplies for ships. However it is difficult to make a general estimation because onshore expenditures vary across different destinations. For instance, according to different studies and reports, average onshore spending of a cruise passenger visiting Caribbean Region ports is \$95 while it is £50 at cruise ports in Slovenia. Another study shows that average spending is £79 at ports of Estonia. On the other hand, it is stated that passengers visiting ports on Atlantic coast of Canada spend an average of \$63.

According to Business Research and Economic Advisors (BREA) (2017) it was estimated that cruise industry generated \$57.9 billion direct economic contribution in 2016 by onshore expenditures of cruise lines, passengers and crew. In addition, BREA stated that \$68.03 billion was generated as indirect and induced contribution and global economic impact of cruise industry reached \$126 billion in 2016 according to latest data.

3. CRUISE TOURISM IN TURKEY

Turkey, with its location which provides natural beauties and its history that hosted many civilizations providing rich cultural heritage, has been one of the most demanded countries for tourism activities. Like other tourism types, cruise tourism gained its own share from this attraction. The number of cruise passengers traveled to Turkey, which were approximately 582 thousand in 2003, increased to 2,240,776 in 2013. With a steady increase in general, except 2009 which an economic recession was experienced globally, number of cruise passengers showed a growth with a 13.8 percent CAGR until 2013. Number of cruise ships visited Turkey is also increased from 887 to 1572 between 2003 and 2013 years. (Republic of Turkey Ministry of Transportation, Maritime Affairs and Communication, 2017)

Table 6: Number of cruise ships and cruise passengers visited Turkey by years
(Republic of Turkey Ministry of Transportation, Maritime Affairs and Communication, 2017)

	Number of ships	Number of passengers
2003	887	581.848
2004	927	645.264
2005	1048	757.563
2006	1317	1.016.314
2007	1421	1.368.400
2008	1612	1.605.372
2009	1328	1.484.194
2010	1368	1.719.098
2011	1623	2.191.420
2012	1685	2.133.930
2013	1572	2.240.776
2014	1385	1.790.125
2015	1456	1.889.370
2016	590	628.033
2017	307	306.887
2018 cont.	176	155.414

Number of passengers, which reached peak in 2013, began to slightly decline after that point but in 2015 these numbers were still close to previous years. However, in 2016 and 2017, a dramatic decline was experienced in the number of cruise ships and passengers visited Turkey. Over two years numbers of cruise ships visited Turkey which was 1456 in 2015, declined to 590 and then 307. Concordantly, the number of passengers decreased by more than 80 percent in two years. According to Turkish Ministry of Transportation, Maritime and Communication data, decline has continued in 2018 and until now only 176 ships and 155,414 passengers visited Turkey. Although 2018 is not yet finished, in the rest of the year, the number of passengers visiting the country is not expected to increase much.

When the number of cruise ports in Turkey is examined, it is seen that an average of 20 ports met the demand between 2011 and 2016. In 2017, number of active cruise ports decreased to 15. Decreasing trend in demand of cruise passengers for Turkey resulted in a decrease in supply and so far in 2018 only 11 cruise ports welcomed cruise passengers. As stated in Table 7; İstanbul, İzmir, Kuşadası and Marmaris ports took the first four places in terms of number of passengers in every year between 2011 and 2015. Between these years, these four ports accommodated at least 80 percent of the passengers visited the country. Although there were changes in the first four ports in 2016 and 2017, port of Kuşadası continued to become the most crowded cruise port. The economic contribution to Turkey by cruise tourism is still continuing despite the decreasing trend; but by means of management of a cruise line, Turkey has no economic profits. Although Turkey had two cruise ships that have sailed under national flag in the past, at the present time there is not any Turkish owned cruise line or cruise ships. (Turkish Chamber of Shipping, 2017)

When number of cruise ships and passengers visited Turkey in the past years evaluated, it can be considered that cruise industry has potential to make a significant positive effect on Turkey's economy. The direct economic impact of the industry can take place in various ways. These ways can be classified as onshore expenditures of passengers and crew, port services like pilotage and towage, agencies, ship repair and maintenance, ship supplies and public revenues like harbor duty or taxes. Turkish Chamber of Shipping (2017) states that average spending of a cruise passenger per day is \$120 in Turkish ports while tourists other than cruise passengers spend \$55 per day. Spending per day increases to \$150 if

visited port is a home-port of a cruise voyage. In addition, crew members working onboard cruise ships spend \$70 per day. According to Turkish Chamber of Shipping (2015) it was estimated that around \$400 million was generated in 2014 by only the onshore expenditures of passengers and crew in Turkish ports.

Table 7: Number of ships and passengers visited cruise ports in Turkey
(Directorate General of Merchant Shipping, 2018)

	2011		2012		2013		2014		2015		2016		2017	
	Number of ships	Number of passengers	Number of ships	Number of passengers	Number of ships	Number of passengers	Number of ships	Number of passengers	Number of ships	Number of passengers	Number of ships	Number of passengers	Number of ships	Number of passengers
Alanya	19	22.324	22	25.674	53	40.719	23	18.556	34	22.332	13	9.271	22	12.190
Anamur	4	351	1	63	-	-	-	-	-	-	-	-	-	-
Antalya	64	127.250	55	12.553	64	12.402	58	175.778	52	168.538	16	45.979	11	40.301
Bartın	2	208	9	852	15	2.068	20	2.824	8	954	2	171	1	103
Bodrum	82	46.031	131	49.861	114	27.276	78	32.879	90	62.050	46	61.315	22	31.817
Bozcaada	-	-	-	-	-	-	-	-	12	14.970	3	1.336	-	-
Çanakkale	23	4.371	25	4.177	36	7.465	42	9.999	73	22.494	28	6.394	5	848
Çeşme	1	89	25	4.393	54	7.602	57	62.115	41	40.772	68	57.987	62	66.021
Dikili	34	17.485	24	4.476	21	6.789	32	7.914	41	8.317	17	3.998	1	99
Fethiye	5	1.975	11	1.969	4	1.035	8	1.938	10	2.824	2	338	-	-
Göcek	7	1.216	6	1.038	2	252	3	380	6	883	2	162	4	538
Güllük	3	1.692	7	1.079	7	476	3	329	3	347	3	323	7	640
İskenderun	5	1.308	-	-	-	-	-	-	-	-	-	-	-	-
İstanbul	420	627.897	382	498.717	381	523.563	317	518.935	345	595.880	56	43.543	5	1.332
İzmir	262	493.533	288	492.398	190	476.774	124	257.233	114	241.716	24	27.619	18	9.172
Kaş	3	507	7	1.018	3	1.152	3	625	11	4.122	4	1.057	-	-
Kuşadası	568	662.456	464	545.148	428	538.917	448	556.745	506	567.315	271	349.781	126	119.884
Marmaris	84	170.021	88	56.922	112	95.709	82	107.724	83	129.126	22	15.628	24	23.736
Mersin	3	416	2	774	3	1.361	-	-	2	1.597	3	2.505	-	-
Mudanya	5	922	-	-	2	413	-	-	2	655	-	-	-	-
Samsun	3	208	7	1.190	12	1.281	17	1.558	5	550	1	54	-	-
Sinop	9	4.088	10	3.708	16	7.451	30	17.518	5	1.361	2	171	1	103
Taşucu	4	805	4	706	-	-	3	937	1	286	2	174	-	-
Trabzon	13	6.267	18	7.643	24	7.438	37	16.138	10	2.281	3	226	1	103

4. GLOBAL TRENDS AND LOCAL EFFECTS ON CRUISE TOURISM IN TURKEY

In spite of the economic recession which has affected the other areas of the maritime sector in a highly negative manner in last ten years, the cruise tourism sector continued its uninterrupted growth. Turkey has taken a decent share of this growth until 2015 but for the last three years, in contrast to the global cruise industry a downward movement has been experiencing in Turkey. It is considered that there are many local and global causes that trigger this downward movement.

Because of cruise passengers started to prefer Asian and Australian regions as a rising trend, a shift in demand for cruise destinations experienced. As stated in Table 5, these regions increased number of passengers hosted by 400 percent in recent years. It can be considered that increasing demand for these two regions caused a decrease in demand for other regions including Turkey. Another demand shift is expected to happen in the next years due to global warming. Melting icebergs in Polar Regions by the effects of global warming created new waterways which are suitable for ships to navigate. According to

CLIA and Florida-Caribbean Cruise Association (FCCA) it is projected to see an increase in popularity of cruise destinations in Arctic and Antarctica regions.

Increasing demand for river cruise tourism is also a threat for cruise ports in Turkey. Again, in recent years, cruise tourism on rivers in Europe is a rising trend. It is stated in a report that river and small ship cruising continues to gain traction among travelers, specifically the millennial set, with a focus on the ever-expanding itineraries and destination experiences (The Florida-Caribbean Cruise Association, 2018). River cruise tourism represents one of the fastest growing segments of tourism with a tendency of further accelerated growth and there has been a continued rapid growth in demand for river cruising in the last few years (Ruzic, Bosnic, Kelic, 2018). Also Jones and Comfort (2016) states that river cruising has grown rapidly in popularity in recent years to become a high profile niche element within the leisure tourism market.

It can be said that the strikes since 2016 at port of Piraeus which is used as home-port by the cruise companies operating in Eastern Mediterranean may have a slight negative effect on cruise tourism on Turkey. Because of the happening strikes from time to time, caused after privatization of port of Piraeus, some cruise companies expressed that they intended to divert some voyages to another routes at Europe. As a result of this, number of voyages beginning at port of Piraeus and make calls at Turkish ports decreased. However, the number of cruise passengers visited Piraeus decreased only from approximately 1.3 million to 1 million between 2013 and 2017 so it can be considered that the negative effect of these strikes on cruise tourism in Turkey remained limited. (The Association of Mediterranean Cruise Ports, 2017)

It is safe to say that the biggest reason for the dramatic drop in cruise tourism is the security concerns of the visitors. In 2015 and 2016, there were 32 terrorist attacks in the country, 460 people were killed and more than 2,000 people were injured in these attacks. Some of these attacks occurred in places that directly affect tourism such as Atatürk Airport, Beşiktaş, İstiklal Street and Ankara. Besides these attacks, experiencing a failed coup attempt in 2016 increased the security concerns of foreign tourists about Turkey. As mentioned in Table 6, sudden drop in number of cruise passengers started after these years. The Association of Mediterranean Cruise Ports, which is an association of cruise lines, cruise ports and cruise agencies in Europe, stated that the difficult moments that Turkey experienced in 2016, had a major effect in Turkish cruise ports that have seen the cruise traffic minimizing, as cruise lines either cancelled or re-directed their calls. The challenging social conditions and the non-port related security incidents observed in Turkey affected cruise activities in all Turkish ports, including the major home-port in the country which is Istanbul. Consequently, Istanbul dropped out of the list of the 10 most popular home-ports in the Mediterranean and its adjoining seas. (The Association of Mediterranean Cruise Ports, 2017)

5. CONCLUSIONS

When cruise tourism industry is examined globally, it is seen that the industry is in an increasing trend since 1980s and according to projections increasing trend would last longer. In 2017; the number of cruise passengers increased to 26 million which is the highest figure of all time and more than half of these passengers were originated from North America. Caribbean and Europe regions are the most preferred destinations but demand for Australia and Asia has been increasing especially in last years. According to estimations, in 2016, the industry generated \$126 billion economic contribution globally by direct, indirect and induced impacts.

When cruise tourism in Turkey is investigated, it is firstly seen that the number of cruise passengers visiting Turkey had increased continuously until 2013 and reached 2.2 million, but in the following years a decreasing trend was experienced and only 306.000 cruise passengers visited Turkey in 2017. In connection with this, between 2013 and 2017, number of cruise ships visited Turkey decreased from 1572 to 307. In 2018 only 11 cruise ports served cruise ships and passengers while there were 20 active cruise ports in 2013. Looking at the fact that average onshore spending per day of a cruise passenger visiting ports in Turkey is \$120 and crew members also spend \$70 per day, cruise tourism has

high potential to provide significant economic contribution to the country.

Although the cruise industry continues to grow globally, Turkey is in a downward movement on this field. Demand for Australia and Asia regions has increased especially in last years and shifting demand affected other regions negatively. Increasing demand for river cruising and increasing potential of cruising to polar region also have potential to affect other regions negatively by gaining a share from destination market. Also it can be considered that terrorist attacks occurred in Turkey in 2015 and 2016 caused security concerns on cruise passengers and have a noteworthy effect on decreasing trend in cruise tourism in Turkey.

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