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ASSESSMENT OF MARINAS IN THE MEDITERRANEAN AND THE POSITION OF TURKEY

ABSTRACT

The most important organizations for developing and advertising the yacht tourism in a country are the marinas. Yachting tourism, being a part of maritime sector tends to play a part in the tourist activities and provides important resources for the general economy.

In this study, the developments in yachting tourism are explained by considering the current status of the marinas in the Mediterranean countries. Basic characteristics of different marinas of the Mediterranean countries will be discussed and also statistical figures will be given. The yachting routes and the potential of Turkey will be analyzed by emphasizing operational, infrastructural and service characteristics. The factors that should be taken into consideration and the methods used for marina marketing will be explained. By considering strengths, weaknesses, opportunities and threats, a SWOT analysis will be made for Turkey marinas. Suggestions will be given fur further development of marina management in Turkey.

KEY WORDS

marina, yacht, Mediterranean, Turkey

1. YACHT TOURISM AND PRESENT SITUATION OF MARINAS IN THE MEDITERRANEAN COUNTRIES

Total yacht mooring capacity in 13 Mediterranean countries is 183,489 in 1992 records. [1] However, as to 2003 records, the total yacht mooring capacity in 20 Mediterranean countries amounts to 293,598. [2] In Table 1 and Table 2, the Yacht Mooring Capacities are presented.

In Table 3 the coastal lengths of the Mediterranean countries are compared with each other by means of nautical miles, marina capacities and number of marinas. As seen from the table below, France is the country, which most efficiently evaluates its potential among Mediterranean countries although it has only 2% of the entire Mediterranean coast. However capacity-wise it is the leader. On the other hand, the Arabian countries commence investing in marinas during the last ten years, after having realized that the west Mediterranean countries make good revenues in yacht tourism.

Table 5 shows the relationship between coastal lengths, and marina capacity. It can be seen that France is the leading country.

2. EVALUATION OF TURKEY BY MEANS OF SUPPLY AND DEMAND IN YACHT TOURISM AND MARINA MANAGEMENT

2.1. Turkey's main marinas and rendered services

Turkey's most established marinas lie on the southern Aegean and Mediterranean coasts at Izmir, Cesme, Kusadasi, Bodrum, Ayvalik, Mersin, Datca, Bozburun, Marmaris, Gocek, Fethiye, Kalkan, Kas, Finike, Kemer and Antalya. These well-equipped harbors contain all the services and provisions any yacht would require. Antalya, Bodrum Dalaman, Izmir and Istanbul airports provide quick links to all marinas in Turkey, ensuring departure by yacht within a day of landing.

Mooring capacities in Table 6 belong to 2004. Not only the marinas, but yacht maintenance locations are also included.

2.2. Blue –flagged marinas in Turkey

The Blue Flag Campaign is one of the four projects executed under the co-ordination of the Europe Environmental Education Foundation (FEEE). The Environmental Education Foundation of Turkey (TURCEV) designates which beaches and marinas have the right display a Blue Flag, which is judged on the basis of cleanliness of water, environmental concerns, security, safety and services. [8]

Table 1 - Yacht mooring capacities of the Mediterranean countries (1992)

No	Country name	Capacity	(%)
1	France (Mediterranean Coasts)	64959	35.40
2	Spain (Mediterranean Coasts)	50858	27.72
3	Italy	39774	21.68
4	Yugoslavia(former)	10274	5.60
5	Turkey	5630	3.07
6	Tunisia	3580	1.95
7	Greece	3329	1.81
8	Malta	1890	1.03
9	South Cyprus	1000	0.55
10	Israel	1100	0.60
11	Monaco	720	0.39
12	Gibraltar	340	0.18
13	Morocco	35	0.02
	Total	183,489	100.00

Note: The length of the yachts is disregarded in calculation of yacht mooring capacity figures

Source: [1]

Table 2 - Yacht mooring capacities of the Mediterranean countries (2003)

No	Country name	Capacity	%	No of Marinas	%
1	France (Mediterranean coasts)[1]	92139	31.38	115	18.55
2	Spain (Mediterranean coasts)[2]	81415	27.73	160	25.81
3	Italy	69.930	23.82	175	28.23
4	Croatia	13610	4.64	48	7.74
5	Tunisia	4249	1.45	11	1.77
6	Greece	8800	3.00	24	3.87
7	Malta	1423	0.48	6	0.97
8	S. Cyprus	1.687	0.57	3	0.48
9	N. Cyprus	200	0.07	2	0.32
10	Israel	2.265	0.77	6	0.97
11	Turkey	12781	4.35	38	6.13
12	Lebanon	1300	0.44	2	0.32
13	Syria	100	0.03	1	0.16
14	Slovenia	1425	0.49	3	0.48
15	Morocco (Mediterranean Coasts)	987	0.34	4	0.65
16	Serbia and Montenegro	1287	0.44	3	0.48
17	Libya			6	0.97
18	Algeria			6	0.97
19	Albania			4	0.65
20	Egypt (Mediterranean Coasts)			3	0.48
	Total	293598	100.00	620	100.00

1) Mediterranean coasts, including Corsica
2) Mediterranean coasts, including Balear islands

Source: [2], [4, 5]

Table 3 - Coastal lengths of the Mediterranean countries

No	Mediterranean Countries	No of Marinas	Yacht Mooring Capacities	Kilom.	Nautical Miles (nm)	Nautical Miles (%)
1	Egypt (Mediterranean Coasts)	3		927	500	2
2	France (Mediterranean Coasts including Corsica)	115	92,139	1,200	648	2
3	Greece	24	8,800	15,147	8,174	30
4	Israel	6	2,265	195	105	0
5	Italy	175	69,930	9,226	4,979	18
6	Slovenia	3	1,425	41	22	0
7	Tunisia	11	4,249	1,927	1,040	4
8	Turkey(Except Black Sea)	38	12,781	6,545	3,532	13
9	Spain (Mediterranean Coasts	160	81,415	2,628	1,418	5
10	Malta	6	1,423	198	107	0
11	Croatia	48	13,610	5,664	3,056	11
12	Lebanon	2	1,300	294	159	1
13	Syria	1	100	212	115	0
14	Serbia Montenegro	3	1,287	293	158	1
15	Libya	6		2,025	1,093	4
16	Algeria	6		1,557	840	3
17	Morocco (Mediterranean Coasts)	4	987	512	276	1
18	North Cyprus	2	200	295	159	1
19	South Cyprus	3	1,687	370	200	1
20	Albania	4	649	350	1	
	Total	620	293,598	49,905	26,932	100

Source: [6]

Table 4 - Blue Flagged Marinas in the World

	Countries	Marina numbers (2003)
1	Germany	186
2	Spain	97
3	Sweden	90
4	France	85
5	Denmark	82
6	Italy	47
7	Holland	36
8	Finland	23
9	Croatia	16
10	England	12
11	Turkey	11
12	Portugal	8
13	Belgium	8
14	Norway	7
	Total	714

Table 5: Relationships among coastal lengths, number of marinas and number of yacht mooring capacities

	Mediterranean Countries	(no of marinas/coast length)*1000	capacity/nautical miles
1	Egypt (Mediterranean Coasts)	6	0
2	France(Mediterranean Coasts,	178	142
3	Greece	3	1
4	Israel	57	22
5	Italy	35	14
6	Slovenia	135	64
7	Tunisia	11	4
8	Turkey	11	4
9	Spain (Mediterranean Coasts,	113	57
10	Malta	56	13
11	Croatia	16	4
12	Lebanon	13	8
13	Syria	9	1
14	Serbia Montenegro	19	8
15	Libya	5	0
16	Algeria	7	0
17	Morocco(Mediterranean Coasts)	14	4
18	North Cyprus	13	1
19	South Cyprus	15	8
20	Albania	11	0

Source: [6]

Table 6 - Docking capacities of marinas in Turkey (Year 2004)

		on sea	shore	Total Capacity	Hauling Facility(Slipway/Hoist)
Marinas of İstanbul - Marmaris Region					
1	İstanbul Ataköy Marina	700	100	800	70 tonnes travellift
2	Setur Kalamışve Fenerbahçe Marina	1,120	220	1340	70 tonnes travellift
4	Çanakkale Public Port	70		70	not available
5	Setur Ayvalık Marina	200	150	350	80 tonnes travellift
6	Setur Çeşme Marina	180	60	240	60 tonnes slipway
7	Çeşme Public Marina	330	70	400	not available
8	Levent Marina	100	40	140	150 tonnes slipway
9	Sığacık Marina	120		120	not available
10	Setur Kuşadası Marina	350	175	525	80 tonnes travellift,150 tonnes syncrolift
11	Port Bodrum Yalıkavak	450	100	550	100 tonnes travellift, 40 tonnes aqua mobile
12	Port D-Marin Turgut Reis Marina	550	100	650	100 tonnes travellift
13	Milta Bodrum Marina	475	50	525	70 tonnes travellift
14	Yacht Lift		100	100	
15	Gündüz Yacht Slipway Facility		85	85	

		on sea	shore	Total Capacity	Hauling Facility(Slipway/Hoist)
16	Pupa Yacht Marina	50		50	not available
17	Marmaris Martı Marina	350	100	450	60 tonnes travellift
18	Marmaris Netsel Marina	720	180	900	110, 20 tonnes travellifts
19	Albatros Marina	200		200	20
21	Sun Marina Yacht Çekek Yeri – Marmaris		100	100	
22	Marmaris Yacht Marina	600	800	1400	330, 80 and 60 tonnes travellifts
23	Kumlubük Yacht Clup – Marmaris	10		10	not available
Total		6575	2490	9065	
Marinas of Antalya - Mersin Region					
24	Göcek İltur Club Marina	205		205	not available
25	Göcek Skopea Marina	85		85	not available
26	Port Göcek Yacht Slipway Facility		156	156	
27	Göcek Public Marina	170		170	not available
28	Port Göcek Marina	400	180	580	70tonnes travellift, 40tonnes boat mover
29	Fethiye Public Port	120		120	not available
30	Fethiye Ece Marina	400		400	not available
31	Kalkan Public Port	40		40	not available
32	Kaş Public Port	80		80	not available
33	Setur Finike Marina	350	150	500	80 tonnes travel lift
34	Park Kemer Marina	240	120	360	60 tonnes travel lift
35	Setur Antalya Marina	235	150	385	60&200 tonnes travellifts, 350 tonnes sledge
36	Antalya Kaleiçi Marina	65		65	not available
37	Bozyazı Public Port	300	150	450	
38	Mersin Public Port	120		120	not available
Total		2.810	906	3.716	
General Total		9.385	3.396	12.781	

Source: [4,5]

In 2003, it had been decided by the International Environment Education Association to nominate 140 beaches and 11 marinas as blue-flagged. However, in 2004, the same association awarded 151 beaches and 12 marinas as blue-flagged. [7] .

2.3. Evaluation of Turkey by means of demand in yacht tourism

The figures below show the number and flags of yachts arriving at Turkish Marinas:

A sharp decrease is seen in the number of yachts in the years 1999 and 2000.

This is due to the big earthquake which occurred in August 1999 in the Marmara region. After that, the number started to increase again.

3. SWOT ANALYSIS

SWOT analysis is to determine the opportunities and threats in external environment and the strengths and weaknesses in the internal environment. However, in this study of SWOT analysis, no reference is made to a particular marina enterprise in the sector, but considered especially for Turkey as a whole.

The Turkey's strengths and weaknesses in yacht tourism and the threats and opportunities arising from external environment have been examined throughout this study.

3.1. Strengths

1. Out of the the total of 8250 km, the coastal length of Turkey – 6545 km belongs to the Mediterranean, Marmara and Aegean;

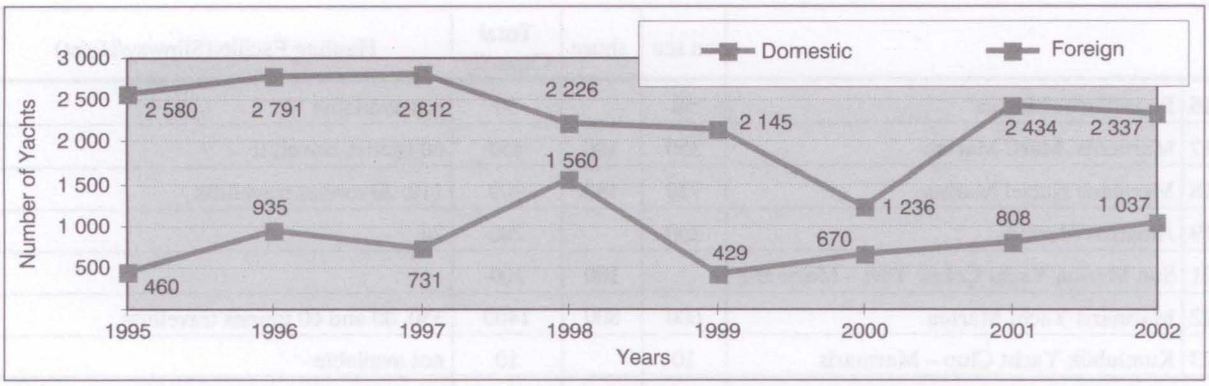

Figure 1 - Distribution of the Flag Q Yachts (for Commercial + Private Use) arriving to Turkish ports by years

Source: [8]

2. Turkey is an attractive country due to its natural beauties, historical cultural wealth, religious motifs and convenient climate located in the middle of a 350 million Europe with high life standards, a 200 million petroleum-rich Arab world on one side and a 250 million opening-out Russian Federation on the other.
3. The East Mediterranean has still preserved its natural beauty.
4. The Mediterranean and Aegean coasts are very attractive regions with their geographical structure, vegetation and the short navigational distance to the neighboring islands.
5. For the yachtsmen, the most important factor in the construction of a marina is the geography of the location, climate and the wind regime. Thereafter comes the distance to the airport. In this respect, the locations of the marinas in Turkey are attractive to yachtsmen.
6. There are 12 blue-flagged marinas in Turkey. The marketing of the blue-flagged marinas represents an important competitive advantage having in view the increasing marine pollution worldwide.
7. In Turkey, there are 6 marinas which have received 5 golden anchor awards. The importance of this award is the fact that it awards international service quality.
8. In Turkey, people from many different nations, origins and religions are living together in peace and respect to each other. This is also an attractive feature for customer loyalty.
9. There is 24-hrs electricity, fresh water and mooring service in almost all the private marinas in Turkey which is an important feature that yachtsmen take into account when selecting marinas.

3.2. Weaknesses

1. In Turkey, the procedures for yachtsmen are still not simple enough and the system works slowly in application.
2. The infrastructure in Turkey concerning the yacht tourism is still insufficient. For instance, most of the serving marinas are located in the Aegean region. Considering the tourists' desire to get to know more about the Eastern culture, regretfully there are no marinas available to serve the cruiser or yacht tourism on the line from Antalya to the east coast.
3. The lack of efficient number of experts in the sector is a considerable weakness.
4. The foreign yachtsmen who visit Turkey during the year are mostly from EU countries. Thus, it is a disadvantage for Turkey to market marinas as it is not a member of EU.
5. Concerning promotion activities, marinas should regularly update their websites and participate in specialist fairs. In this respect Turkey seems to be weak in these promotional activities.

3.3. Opportunities

1. The negative construction, destruction of the nature in the West Mediterranean, as an example Italian coast getting mossy caused yachtsmen to approach East Mediterranean.
2. Charter activities of foreign yachts are not allowed at the Croatian coast since 2005.
3. There are very few blue flagged marinas in Croatia. For instance, Umag is the only one among 21 ACI marinas.
4. The price policy is rather higher than Turkey.
5. Cultural tourism and the cruising from America to Europe is improving rapidly due to the demand of American tourists . There are not sufficient marinas to serve these cruiser ships in Europe.
6. The marina service prices in West Mediterranean are rather more expensive than Turkey.
7. The developed countries in yacht tourism i. e. France, Spain, Italy, Croatia and Greece are using the Mediterranean as an internal sea convenient for yachting. Due to geographical close distance, it

is an advantage for Turkey that these countries had sufficiently promoted Mediterranean to the yachtsmen.

3.4. Threats

1. The East Mediterranean countries do give importance to marina investments due to profitability in yacht tourism. Consequently, the development has been remarkable over the last ten years.
2. The convenient geographical structure, easy distance to European countries and common culture with Europe can be mentioned as Croatia's strengths in yacht tourism. It is also aware that this tourism brings good income and Croatia has a good potential. For instance in the last couple of years, ACI club spent big efforts to make yachting Croatia's national sport and to develop it. Although it has 3056 nm, its marina capacity in the Mediterranean is 4.64%. It still cannot evaluate its potential efficiently.

The service rendered in Croatian marinas is up to international standards.

Especially for the new amateur yachtsmen starting up, it is preferred to be served in ACI marinas since it is possible to leave one ACI marina in the morning and reach another safe one in the same day by the evening.

Having in view all the above mentioned points, Croatia is the strongest rival to Turkey, in marina sector.

4. CONCLUSION

The marina capacities of the Mediterranean countries have almost doubled in the last 10-15 years.

In parallel to this development the East Mediterranean and new countries have invested into this sector as well. The Arabian countries, although very little, have started to make investments. France, Spain, Italy have the leadership in this sector. Turkey with its new investments, follows Croatia as a new upcoming country in the East Mediterranean. Croatia is the strongest rival to Turkey.

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ÖZET

Bir ülkede yat turizminin tanınması ve gelişim göstermesinde çalışabilecek en önemli kuruluşlardan biri marina işletmeleridir.

Marina işletmeleri; doğrudan yat kullanıcılarına hizmet verdiği için yat turizminin tanıtımında etkin bir rol oynamaktadır. Bu noktada da marina işletmelerinin pazarlanması konusu gündeme gelmektedir.

Bu çalışma ile yat turizminin Akdeniz'deki gelişimine kısaca değinilmiş; bugün hangi noktada olduğu ve Akdeniz ülkelerinin bu gelişimdeki payları üzerinde araştırma yapılmıştır. Türkiye'nin Akdeniz'deki konumu belirlendikten sonra; Türkiye'de marina işletmelerinin pazarlanmasında, kullanılan yöntemler, dikkate alınması gereken unsurlar, araştırılmış ve değerlendirilmiştir. Bu amaçla SWOT analizi yapılarak Türk yat turizminin kuvvetli ve zayıf yanları, fırsatlar ve tehditler ortaya konmaya çalışılmıştır.

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