

Transition strategies towards a more sustainable marine tourism: some proposals from a European project

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ABSTRACT

In Italy, the economic relevance of coastal and inland tourism is demonstrated by its added value, which amounts to about 10% of the national GDP, and by its share on total employment, around 13%. Marine tourism is the main type of tourism in Italy, accounting for 20% of foreign arrivals only, but 30% of attendance.

This paper analyzes the implementation process and some results on possible transition strategies towards a more sustainable marine tourism of the European Project Bluemed, a Coordination and Support Action (CSA) just focused on specific characteristics and needs of the Mediterranean area. One of the main maritime socio-economic drivers identified and then analyzed by Bluemed is just marine tourism, given its importance for the economic and coastal-maritime development (Italy has about 7.500 km of coastline). Nevertheless, it has many constraints to face and solve, mainly the high seasonality, strongly concentrated in the summer months.

In the present paper, only the Italian activities and results of Bluemed will be analyzed. These activities have been carried on with the engagement and contribution of the Italian marine scientific community and of relevant marine and maritime stakeholders. This paper will describe the several approaches, activities and tools adopted within the four Italian Mirror Platforms, created in order to manage these interactions, as well as the new transition strategies proposed.

This paper is complementary to the [video](#) presented by the author at Blue Planet Economy (BPE) European Maritime Forum 2021.

KEYWORDS: marine tourism, sustainability, blue growth.

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1 INTRODUCTION

Maritime and coastal tourism is the largest maritime activity in Europe and employs nearly 3.2 million people, generating more than 180 billion EUR in gross value added, which represents over a third of the maritime economy.

Coastal tourism includes not only tourist and recreational activities related to the beach, but also many other activities for which the sea proximity is an advantage, such as those that can be carried on along the coast and inland. Maritime tourism, on the other hand, refers to mainly water activities, such as sailing and water sports or cruises.

Coastal tourism shows significant differences at the local scale. Some areas are characterized by tourism products that have reached good levels of maturity. Other places, especially in the coastal hinterland, are still struggling to become a tourist destination and to intercept the nearby seaside tourism and integrate with it. Italy is among the countries with the oldest tourist vocation and it also boasts an artistic and natural heritage like few others. Domestic and international bathing tourism, despite generating only 1/5 of arrivals, amounts on 30% of attendance, and is therefore the main type of tourism in Italy (Cariola, 2021).

Coastal economies are particularly vulnerable to economic, financial and political changes, as they are mainly made up of Small and Medium Enterprises (SMEs) and micro-enterprises. Due to the economic crisis, most SMEs, which are active in the tourism sector, have problems accessing credit for investments and innovation.

This paper summarizes some results of the European project Bluemed (a 2016-2021 CSA within H2020), which involved nine different European countries (Croatia, Cyprus, France, Greece, Italy, Malta, Portugal, Slovenia, Spain) and their relevant stakeholders in the definition of shared strategies for the empowerment of the blue growth in the Mediterranean area. The Italian National Research Council (CNR) coordinated this project. Bluemed analyzed the most relevant activities and thematic objectives for some of the main marine and maritime socio-economic drivers (such as transports, tourism, energy, shipbuilding, etc.). The present paper focuses its attention on Bluemed's results relating to the coastal and maritime tourism sector, trying to draw some suggestions for its development and some policy indications.

2 A FRAMEWORK OF THE SECTOR

Tourism expansion continued until 2019¹: for example, between 2000 and 2016, tourist arrivals grew by 42% and the number of nights spent by 17%. This trend is even more relevant as far as the international portion is concerned: before the Covid-19 crisis, foreign arrivals had increased by about +60%, and the share of foreign tourists had passed from 44% in 2000 to about 50%. The provenance of foreign tourists is relevant because it implies different behaviors: the German-speaking share (1/4 of the total international arrivals) mainly prefers seaside resorts, lakes and spas in northern Italy; Anglo-Saxon and non-European mature tourists focus on cities of art. The Italian tourists have always shown a strong preference for proximity seaside tourism, mainly during the summer, characterized by regional or interregional movements with the use of private transportation (especially towards the second home). For these reasons, bathing tourism is the main type of tourism in Italy, accounting for 20% of foreign arrivals only, but 30% of attendances (CNR-IRiSS, 2016; CNR-IRiSS, 2017; CNR-IRiSS, 2020).

After the 2020 serious tourism crisis, due to the COVID-19 pandemic, summer 2021 turned positive mainly thanks to the return of Europeans, as it emerges from the usual end-of-season survey carried out by CST Florence for Assoturismo Confesercenti². According to this survey, in Italy the summer of 2021 was characterized by an estimated growth in flows of + 21% more than

¹ Data www.istat.it/it/archivio/turismo (last access on 30/09/2021).

² <https://centrostuditoristicifirenze.it/blog/turismo-estate-2021-in-italia/>

the summer of 2020, with 33 million tourists and 140 million overnight stays. Seas (+ 19%) and Mountains (+ 13.1%) were doing well, but also Cities of Art (+ 25.4%), Lakes (+ 29.2%), and Hills (+20.4) were recovering. The estimated increase in demand from foreigners was + 25.1%. These were European tourists: Germans (+ 40%), French (+ 30%), Dutch (+ 25%), and Swiss (+ 21%). Overseas and Asian tourism was still on standby. Unfortunately, these data are not stable yet, as the pandemic is not over yet, and its trend determines continuous variations and stop and go.

3 ELEMENTS CHARACTERIZING THE STRUCTURE OF THE PROJECT

In the past, most of the European policies in favor of the sea have never paid a particular attention to the Mediterranean. On the contrary, they have often favored the seas bordering the Northern European countries. Instead, the Mediterranean area has always been a crucial crossroad for the history, economy and culture of European, Middle Eastern and North-African Countries. This specific context has very different problems compared to the Northern European seas and the Oceans.

For this reason as well, in the last years, the European Union (EU) has decided to support a more sustainable use of the sea and its sustainable marine/maritime economic development, in particular with reference to the Mediterranean Sea³.

The present article analyzes the implementation process and some results related to the marine tourism sector of the European Project - Coordination and Support Action (CSA) - Bluemed⁴, just focused on the specific characteristics of the Mediterranean area. Eleven organizations from nine countries participated in Bluemed (budget 2,998 K€), which involved the relevant actors/stakeholders of the Mediterranean Sea in the definition of sustainable strategies for supporting the blue growth, with many different approaches, tools and activities. The eleven organizations are:

- Consiglio Nazionale delle Ricerche (CNR) Italy;
- Research Promotion Foundation (RPF) Cyprus;
- Ministerio de Economía y Competitividad (MINECO) Spain;
- Instituto Español de Oceanografía (IEO) Spain;
- Centre National de la Recherche Scientifique (CNRS) France;
- Institut Français de recherche pour l'exploitation de la mer (IFREMER) France;
- Hellenic Centre for Marine Research (HCMR) Greece;
- Institut Za Oceanografiju i Ribarstvo (IZOR) Croatia;
- Malta Council for Science & Technology (MCST) Malta;
- Direção-Geral de Política do Mar (DGPM) Portugal.

The methodology followed in the Bluemed project was based on a long interactive process for the definition of goals, in turn divided into actions and sub-actions specifically identified to reach those goals. To support this process, interviews, panels and workshops with main maritime actors and stakeholders were carried on in each participating country. The Mediterranean Region is characterized by evolving political, social and environmental conditions, according to the aim of the project, it needed an interactive process, able to involve the main actors from different sectors

³ See: European Commission Staff Working Document (2017). Report on the Blue Growth Strategy: Towards more sustainable growth and jobs in the blue economy Staff Working Document (SWD), 128. Available at [https://ec.europa.eu/transparency/documents-register/detail?ref=SWD\(2017\)128&lang=en](https://ec.europa.eu/transparency/documents-register/detail?ref=SWD(2017)128&lang=en); European Commission, Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (2017). The European Tourism Indicator System: ETIS toolkit for sustainable destination management. Publications Office. Available at <https://data.europa.eu/doi/10.2873/982144>;

European Commission, Directorate-General for Maritime Affairs and Fisheries (2016). *Facts and figures on the common fisheries policy* (basic statistical data: 2016 edition). Publications Office. Available at <https://data.europa.eu/doi/10.2771/207860>

⁴ <http://www.bluedmed-initiative.eu/the-project/>

and disciplines, in order to build the right environment for supporting the economic growth, also considering social implications and environmental conservation (EU, 2016; Cvitanovic et al., 2015).

Both a top-down and a bottom-up approaches have been used to stimulate a dialogue among stakeholders; four thematic working groups were established, the so called Bluemed Platforms, both at the national (Mirror Platforms) and at the Mediterranean level. They are:

1. Knowledge Platform: knowledge of Mediterranean Sea dynamics and ecosystems
2. Economic Platform: economic sectors of Blue Growth economy
3. Technology Platform: enabling technologies for Blue Growth
4. Policy Platform: science to policy for Blue Growth

Platforms have been conceived as “virtual environments” where representatives from stakeholders at the national level could interact to convey the message of national communities, as well as to discuss and agree on gaps, needs, barriers and priorities related to the actions identified in the Bluemed Strategic Agenda (Bluemed Italian Working Group, 2018).

One of the platforms’ activities was to identify the most relevant thematic objectives for Blue-growth in the Mediterranean for each of the main marine and maritime socio-economic drivers (tourism, food, transport, chemicals and materials, energy, security). Their relevance has been defined by looking at their potential impact in terms of societal, economic and environmental benefits.

3.1 ACTIVITIES AT THE ITALIAN LEVEL WITHIN THE MIRROR PLATFORMS

In this paper we will describe the activities carried on within the Mirror Platforms only at the Italian level, with the contribution and the active engagement of the Italian marine scientific community and of relevant stakeholders. Several approaches and tools were adopted within the four Italian Mirror Platforms in order to reach shared opinions on the strategies to be pursued to achieve the objectives set for each driver, including tourism.

The main tools and activities carried out in Italy have been (Bluemed Italian Working Group, 2018; Cariola, 2021):

1. National Bluemed events gathering the Italian stakeholders (the first one was held in Rome, June 2017) for collecting ideas and suggestions and identifying problems and areas of intervention in order to draw up a draft of the Bluemed Agenda.
2. The online survey “Share your view on the Research and Innovation agenda for the Med”. It was launched to obtain inputs/revisions to update the Bluemed Agenda by examining in detail each goal and action, identifying barriers and bottlenecks, always with specific attention to the peculiarities of the Mediterranean area.
3. Consultations with experts. Leading experts in different marine sectors were invited to review the state of the art of “blue” sectors; to analyze related cross-cutting issues and constraints; to define trajectories towards Blue Growth objectives.
4. An inter-ministerial working group on Blue Growth. To coordinate and strengthen the outputs of the previous steps, open and public discussions were organized through regular meetings. They involved decision makers, including representatives from relevant ministries, to better align and strengthen the Bluemed goals with national programs and strategies on the Mediterranean.

4 POSSIBLE TRANSITION STRATEGIES TOWARD A MORE SUSTAINABLE TOURISM SECTOR

Among the Bluemed Italian platforms’ activities, for Tourism and each of the other identified marine and maritime socio-economic drivers, the most appropriate roadmaps have been written,

to overcome the many obstacles identified and reach the relevant thematic objectives selected for the Blue growth in the Mediterranean.

Seasonality has been identified as one of the main obstacles in the marine and coastal tourism sector. As it is concentrated in the summer period, there is a consequent lack of career opportunities because this seasonality does not attract or retain sufficient qualified staff, thus causing problems in the quality of services and hindering competitiveness. The sector needs qualified professionals, with a service-oriented mindset and ability to speak multiple languages. It also needs dynamic entrepreneurs to promote professional approaches between local businesses, administration and stakeholders (European Commission Staff Working Document, 2017).

Today, many tourists prefer a unique and personalized experience rather than a more traditional type of “sun and sea” holiday solution. This turn in demand requires flexibility and the operators’ ability to adapt very quickly, developing new products and innovative activities, for example promoting the attractiveness and accessibility of coastal and marine archeology, maritime heritage, underwater tourism and food and wine activities. In the last years, an interesting case has been the *SubArcheo* project⁵, which has developed new methodologies for distance learning, aimed at training archaeologists and underwater guides in the coastal areas of the Mediterranean Basin, as well as Certifications for the use of Multimedia Tools and Visual Tools (e.g., virtual reality reconstruction through 3D software). The project also contributed to developing courses for the retraining of fishermen, as well as to promoting the protection of social and cultural heritage.

Another kind of marine tourism, cruise tourism, has had a great expansion until the Covid limitations; in the future, it could still be a great opportunity for the coast and the inland areas. However, if not well managed, it is not always easy to reap the economic benefits generated by cruise tourism. This type of tourists often stop in the port for only a short time without giving a real added value to the area involved in the landing, notwithstanding the high investments requested by cruise tourism for port infrastructures and environmental protection.

Considering the main opportunities and the obstacles identified by Bluemed, the transition strategies towards a more sustainable and profitable marine tourism sector can be summarized in the following roadmaps (Bluemed Italian White Paper Working Group, 2018; Cariola, 2021):

- Identification and differentiation of the main types of coastal tourism (e.g., nautical tourism, maritime tourism, cruise tourism, urban tourism, green tourism, experiential tourism) and the related main objectives, in order to offer to each of them different and targeted proposals, but also proposals of integration with cultural and natural attractions.
- Integration between the coast and the hinterland with forms of slow inter-mobility; for example, through connection and promotion of cycle routes between coastal areas and the hinterland and combination with other forms of mobility, such as navigable waterways and railway network.
- Integration of marine tourism into other productive activities (agriculture, crafts, culture, fishing, etc.) and between different destinations, in order to expand the offer of tourism products. An example could be the development of fishing and ichthyic tourism, involving local fishermen or local workshops in tourism offerings, so that vital productive activities and important professions can be valued (Manente, 2016). The interventions for the development of fishing tourism, involving local entrepreneurs, could thus be able to supplement their income; visits to historic artisan businesses could enhance and maintain vital productive activities and professions relevant for the local culture, both tangible and intangible, which is at risk of disappearance.
- Use of tourism as a vehicle for educating people, increasing the use of the heritage and historical-cultural, natural and food and wine resources.
- Development of new advantages for coastal tourism also through a “life learning” approach and of alternative tourism products that respond to the growing demand for a more

⁵ <http://euroreso.eu/projects/subarcho/>

experiential and active holiday, which allows to “discover and live” the destination in an authentic and sustainable way. For example, responsible underwater tourism, volunteer camps for responsible tourists, experiential-educational proposals through boat excursions with marine biologists, marine archaeologists and other experts.

- Implementation of interactive and multi-device tools based on ICT technologies to enrich the visit experience (e.g., augmented and virtual reality that allows to “reconstruct” aspects of the territory that are no longer visible, or historical events, or to learn a certain craftsmanship technique, etc.).
- Expansion towards the coast and the inland of the opportunities offered by cruise tourism, which is often “hit and run”.
- Greater control and better management of tourist flows, to limit temporal and spatial over/under uses.
- Promotion of new products and activities along the coast, addressed to more “advanced” and “spending” tourists.
- Fostering the tourism development of the internal “minor” localities, often little known, but which could offer interesting opportunities for recreation and integration with more purely maritime activities.

5 CONCLUSIONS

Some results of the analysis and activities carried on within the Bluemed project have allowed to identify the main criticalities/bottlenecks that could prevent or preclude the achievement of the national and trans-national objectives of the Bluemed Agenda. Specifically, we refer to those carried on within the Mirror Platforms on tourism, one of the more important marine and maritime socio-economic drivers in Italy. In conclusion, the main specific identified factors on which the maritime system should still concentrate its efforts are (Cariola, 2019; European Commission Staff Working Document, 2017):

- The different perception of priorities within the different stakeholders (tourism operators, public authorities, civil society, scientists, industries).
- The present low levels of interactions among the different stakeholders.
- The present strong level of competition among different areas and the existing conflicts for related activities.
- The knowledge gaps (related to each aspect: natural sciences, technology, economy).
- The skill gap (fit-for-blue-job competences which have yet to be developed).

In order to give impulse to a sector with very good potential, but still with many critical issues, it could be helpful to follow a strategy focused mainly on three directives (to be then declined on various levels) , namely (Bosello et al. 2016; Cariola, 2019; EC, 2017, MIBACT, 2017):

- New technologies and ICT services for a more sustainable and profitable marine tourism.
- Integration between coast and hinterland, to overcome the next challenges, including those related to climate change.
- De-seasoning and differentiating the tourist offer, enhancing the enjoyment of the historical-cultural, natural and eno-gastronomic heritage of the hinterland.

This kind of strategy could favor another important twofold objective: promoting new products along the coast aimed at more “advanced” and “spending” tourists, and promoting the tourist development of the internal “minor” localities. This strategy should also seek to predict the dynamics of tourism in Italy in the next future: it is estimated that cultural tourism will be the most dynamic; green tourism will be expanding, too; while seaside tourism could slow down in the medium-long term (CISSET, 2018).

The way towards a complete sustainable and profitable development of coastal and marine tourism is still long and sometimes tortuous, but the main cornerstones have been defined and

placed. The influence of the pandemic and climate changes are also creating new sensitivities in the population and this could be supportive even at a policy level.

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