

BLUE GROWTH STRATEGY: SUSTAINABLE DEVELOPMENT FOR EUROPEAN COASTS AND SEAS

Opportunities from Blue-Growth: sustainable tourism in
coastal and marine areas
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From the “Pre-assessment for the implementation of the
Marine Water Framework Directive -DG Environment”

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Coastal Tourism:

Several uses for a single resource

→ Coastal tourism > high differentiation: coasts “attract” different typologies of tourists.

Every typology differs in:

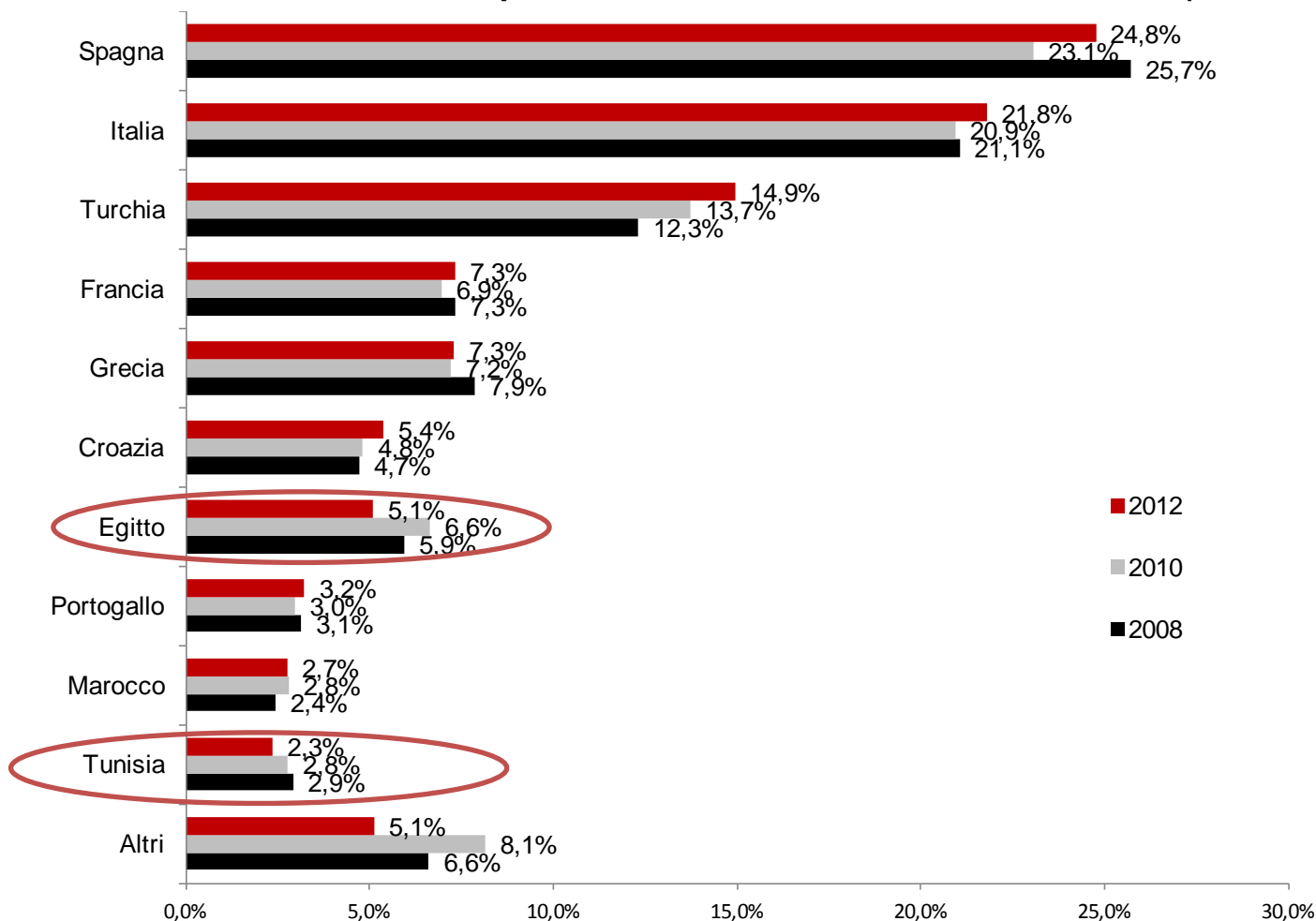
- market
- evolution and trend
- attention to water quality or to other environmental components.

→ Different roles of the resource “sea” inside tourism consume: key resource for sea & sun tourism and for nautical tourism; secondary resource for urban tourism, although in port cities



Tourism in Mediterranean coastal areas

Share of coastal areas of some important destinations on total Mediterranean (% international arrivals)



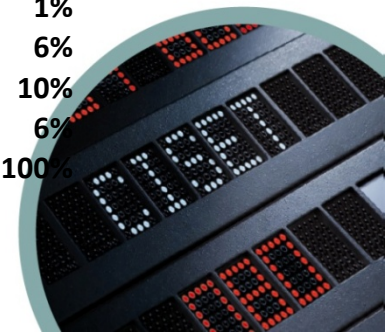
Tourist overnights in Italian coastal areas

Estimation of tourism pressure in Italian coastal areas, total and regions (official tourism + non-register tourism)

	Total nights	% Composition
Italian Coastal Regions	847.397.164	87,0
--of which coastal areas	635.730.747	65,3
Other Regions	126.474.774	13,0
TOTAL ITALY	973.871.938	100,0

**Multipliers:
2.4 – 3.2**

Total nights	Coastal Areas	Total	Coastal Areas/Total	Region/Total
Liguria	53359263	55627040	96%	8%
Veneto	64200355	123674070	52%	10%
Friuli-Venezia Giulia	15698638	23076658	68%	2%
Emilia-Romagna	96986980	128305276	76%	15%
Toscana	47747654	92956105	51%	8%
Marche	28823732	39736575	73%	5%
Lazio	51509631	68399444	75%	8%
Abruzzo	33177137	45914991	72%	5%
Molise	1947364	5106821	38%	0%
Campania	38823082	43868499	88%	6%
Puglia	58981890	63395061	93%	9%
Basilicata	4350796	6079328	72%	1%
Calabria	38977243	39399211	99%	6%
Sicilia	60773508	70297512	86%	10%
Sardegna	40373475	41560573	97%	6%
TOT Coastal Regions	635730747	847397164	75%	100%



Tourism supply in Italian coastal areas

Coastal areas account for **54,6% of the overall bed places** (51,4% hotel e 57,5% non-hotels)
(Source: ISTAT)

Top areas:

- Veneto-Friuli Venezia Giulia coasts
- Emilia Romagna coasts
- Toscana
- Costa Smeralda
- Campania coasts
- Gargano



Sources: Ciset on data ISTAT, Rapporto sul turismo Italiano, Banca d'Italia

Tourism supply system in coastal areas: The main macro-areas



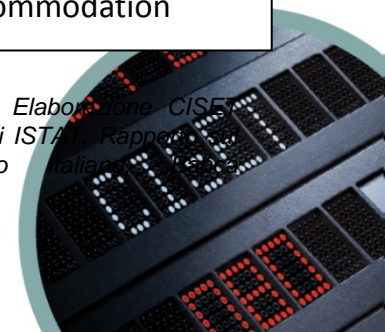
Tyrrhenian coasts: from Liguria to Basilicata, a greater extension but smaller destinations, difference in landscapes (rocks, sandy beaches, etc.).

Southern coasts: Islands and Calabria, tourism that is mainly local and less organized with only some medium size centers.

North Adriatic coasts: from Friuli to Marche, sandy beaches organized with seamless mass tourism destinations

Central and Southern Adriatic coasts: from Abruzzo to Puglia, smaller destinations with some big centers only which concentrate the overall accommodation

Fonte: Elaborazione CISE su dati ISTAT, Rapporto turismo italiano 2010 d'Italia



Economic tourism dimension in coastal areas

Estimation of tourist expenditure in coastal areas

	Expenditure (bil €)	Share
Italian coastal regions	74,32	75,7%
Of which only in coastal areas	46,25	47,1%
Italian internal regions	23,91	24,3%
TOTAL - Italy	98,23	100,0%

Spese (mld Euro)	Aree costiere	Totale regionale	Costa / Regione	Costa / Italia Costiera
Liguria	3,6	4,7	75,4%	7,7%
Veneto	4,7	11,1	42,8%	10,3%
Friuli-Venezia Giulia	1,1	2,3	48,9%	2,4%
Emilia-Romagna	7,4	10,8	68,5%	16,0%
Toscana	4,5	10,3	43,6%	9,7%
Marche	1,5	2,3	64,6%	3,2%
Lazio	5,6	10,3	54,1%	12,0%
Abruzzo	1,5	2,3	67,3%	3,3%
Molise	0,1	0,2	35,8%	0,2%
Campania	3,5	4,6	75,7%	7,6%
Puglia	3,4	4,2	82,8%	7,5%
Basilicata	0,2	0,3	58,8%	0,4%
Calabria	1,4	1,5	93,9%	3,1%
Sicilia	4,6	5,9	77,9%	9,9%
Sardegna	3,1	3,4	89,8%	6,6%
TOT Italia Costiera	46,25	74,32	62,2%	100,0%

Sources Ciset on data ISTAT, Rapporto sul turismo Italiano, Banca d'Italia



TOURISM AND POLLUTION

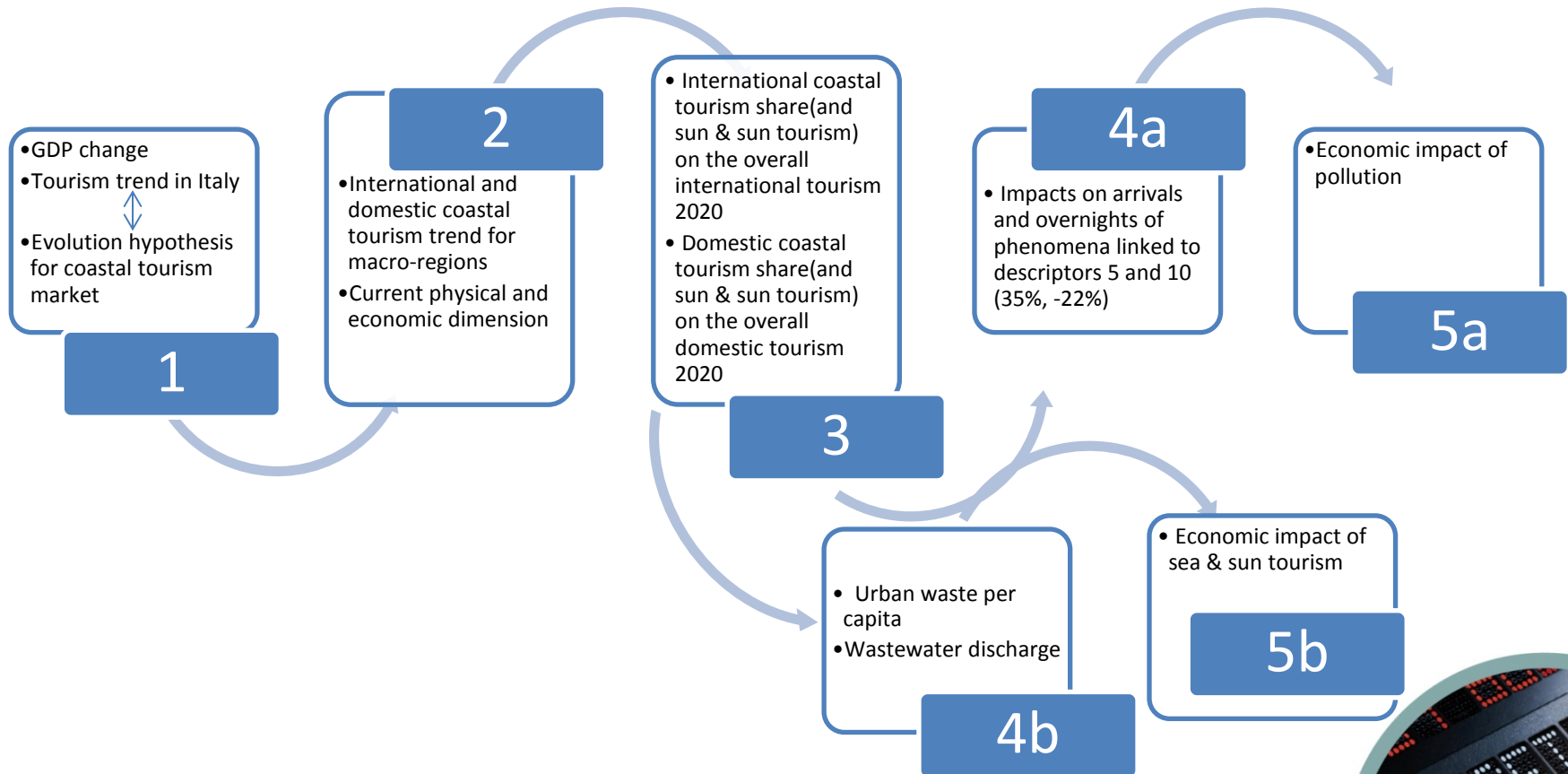


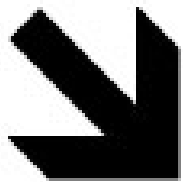
DETERIORATION SCENARIO TO 2020 AND CONNECTION WITH THE MODEL CGE (FEEM)





Steps of analysis





2020. Costs for the management of pressure linked to tourist overnights (official and non-register) (4b -5b)

	Cost per AE (€)	Cost linked to overnights in official accommodation (€)	Cost linked to overnights in private houses and non-register accommodation (€)	Management cost (€)
Liguria	5	72.834.208	231.381.402	304.215.610
Veneto	5	188.377.625	495.743.905	684.121.530
FVG	5	16.553.898	110.360.452	126.914.350
Emilia-Romagna	5	158.904.863	565.226.767	724.131.630
Toscana	5	106.198.289	434.109.706	540.307.995
Marche	5	43.350.279	181.781.126	225.131.405
Lazio	5	142.587.584	233.984.496	376.572.080
Abruzzo	5	30.524.620	229.747.815	260.272.435
Molise	5	1.261.246	28.043.684	29.304.930
Campania	5	91.791.484	150.958.861	242.750.345
Puglia	5	69.441.861	292.789.179	362.231.040
Basilicata	5	8.064.107	28.501.748	36.565.855
Calabria	5	42.593.390	183.474.885	226.068.275
Sicilia	5	72.480.240	353.808.835	426.289.075
Sardegna	5	71.413.497	178.390.783	249.804.280
Coastal Regions	5	1.121.021.546	3.693.659.274	4.814.680.820



Main segments and sensitiveness to pollution (4a – 5a)

Sensitiveness to improvement/deterioration of marine water quality ...

<u>Segments</u>	<u>Sensitiveness</u>
Sea & sun tourists	Medium - high
Nautical tourists	Low
Cruise tourists	Zero (CLIA survey, limited use, several attractors)
Urban tourists	Zero (other attractors)





Descriptors and sea & sun tourism

On the basis of past experiences, the descriptors that are related better than others to the type of sensitiveness of the sea & sun tourism demand are 5 and 10, however at levels that bring an evident positive impact.

Descriptor 5: Eutrophication

Jellyfishes, weeds

Descrittore 10: Marine waste

Waste in the sea
or on the beach

**Reduction
of tourist
arrivals and
overnights**





Deterioration and tourism to 2020: simulation

Simulation: possible case of pollution caused by eutrophication in Northern Adriatic coasts in 2019 with effects in 2020 too.

The area was selected on the basis of the preliminary evaluation made by ISPRA, that underlines that the area of Northern Adriatic Sea is that one with the highest indicators referring to eutrophication.

	Change in tourist overnights (%) compared to the case without deterioration		Change in tourist expenditure (Millions of €) compared to the case without deterioration		Change in tourist expenditure (%) of the overall regional added value**	
	2019	2020	2019	2020	2019	2020
Veneto	-12,80	-17,70	-1529	-2278	-0,94	-1,38
Friuli Venezia Giulia	-10,30	-21,00	-207	-427	-0,54	-1,11
Emilia Romagna	-8,50	-17,60	-1096	-2289	-0,62	-1,29
Total*	-3,38	-5,71	-2832	-4994	-0,24	-0,42
Rest of Europe	0,20	0,34	682	1203	0,005	0,008
Rest of the World	0,04	0,06	2149	3790	0,005	0,008

* All coastal regions

** Calculated by referring values of columns 4 e 5 to regional AV contained in the projections of the CGE model baseline

Sources: FEEM on Ciset scenario

