

Development of International Tourism in Turkey : Its Effect and Problems

YAMAMOTO, Kenji / 山本, 健兒

(出版者 / Publisher)

法政大学比較経済研究所 / Institute of Comparative Economic Studies, Hosei University

(雑誌名 / Journal or Publication Title)

Journal of International Economic Studies

(巻 / Volume)

11

(開始ページ / Start Page)

69

(終了ページ / End Page)

92

(発行年 / Year)

1997-03

(URL)

<https://doi.org/10.15002/00002134>

Development of International Tourism in Turkey

— Its effect and problems —

Kenji Yamamoto

Faculty of Economics, Hosei University

Abstract

The purpose of this paper is to describe the development of international tourism in Turkey and to explain it by shedding light on the behavior of two kinds of actors, namely the central government and tour operators. Turkey has experienced the most rapid growth of international tourism among leading countries in this sphere in the last decade. In this sense, Turkey is a successful country. Those two actors have played decisive roles respectively in Turkey's success in international tourism. By analyzing the behavior of these actors, it is possible to explain the reasons why Turkey could be successful from a particular year in the 1980s, and how it could overcome the crisis of international tourism in the 1990s. However, there are also serious problems caused by the development of tourism. This paper points out the problems as well.

1. Introduction

Some Japanese scholars have recently argued that tourism is one of the most important activities in the present life of human beings and have begun to conduct research into tourism and to publish studies on it. Most of them use the Japanese word "*kanko*" 観光 as a synonym for tourism. We can find a typical example in Kitagawa (1996). But "*kanko*" does not mean tourism in general, but travel for leisure. On the other hand, the term "tourism" really has a much broader sense than "*kanko*". It implies not only holiday activities in any other place away from one's normal residence with temporal restrictions, but also travel which is conducted for attending trade fairs, congresses and conventions, and even for visiting another place with the aim of business, religion, study, health care, and so on (Davidson, 1993, pp.1-4; van Harssel, 1994, pp.3-4). According to the World Tourism Organization in Madrid, which publishes statistical materials on international tourism, "tourism includes all travel that involves a stay of at least one night, but less than one year, away from home" (Shaw & Williams, 1994, p.5).

Thus the term "international tourism" is not restricted only to leisure activities in foreign countries but includes also travel which is conducted for attending international trade fairs, congresses and conventions, and visiting foreign countries with the

aim of business, religion, health care, and so on. The statistical data on international tourism which Kitagawa (1996) presents actually include the activities other than leisure in foreign countries, though she does not mention the coverage of the statistics. Nevertheless it is also true that tourism is a concept inseparable from leisure activities. It is not unused to leisure activities in the course of business travel.

International tourism is one of the most important activities in the sense of economic development both for developing and for advanced countries. It is a type of cross-border flow of people as well as of money and information. Without numerous transactions in people, goods, money and information, even the most developed countries would gradually lose their position in the world economy. Therefore, a number of countries and cities are eager to promote international tourism, especially for business.

On the other hand, for developing countries, international tourism means inflow of foreigners who want to enjoy their holidays. It is important for these countries, above all because it can bring about employment opportunities and because international tourists bring the host developing countries hard currency. Therefore, many developing countries are trying to invite as many international tourists as possible in order to promote employment opportunities in their own countries and to acquire foreign currency. Vorlaufer (1990) points out that acquiring foreign currency, growth of employment opportunities and increase of income are targets of promoting international tourism for Third-World countries. Turkey is a typical case.

Tab. 1 World's top tourism destinations

Rank 1992	Country	Tourist arrivals (in thousands)			Growth rate		
		1992	1988	1985	92/85	92/88	88/85
1	France	59,590	38,288	36,748	1.622	1.556	1.042
2	Spain	55,331	35,000	27,477	2.014	1.581	1.274
3	Italy	50,089		25,047	2.000		
4	USA	44,647	34,474	25,417	1.757	1.295	1.356
5	Hungary	20,188	10,563	9,724	2.076	1.911	1.086
6	Austria	19,098	16,571	15,168	1.259	1.152	1.092
7	UK	18,535	15,798	14,449	1.283	1.173	1.093
8	Mexico	17,271	5,692	11,907	1.450	3.034	0.478
9	Germany	15,147	13,113	12,686	1.194	1.155	1.034
10	Canada	14,741	15,493	13,171	1.119	0.951	1.176
11	Switzerland	12,800	11,700	11,900	1.076	1.094	0.983
12	Greece	9,331	7,778	6,574	1.419	1.200	1.183
13	Portugal	8,884	6,624	4,989	1.781	1.341	1.328
14	former CSR	8,000	14,028	4,869	1.643	0.570	2.881
15	Hongkong	6,986	5,589	3,370	2.073	1.250	1.658
16	former USSR	6,900	6,007			1.149	
17	Turkey	6,549	3,715	2,079	3.150	1.763	1.787
18	Romania	6,280	5,514	4,772	1.316	1.139	1.155
19	Malaysia	6,056	3,374	2,933	2.065	1.795	1.150
20	Netherlands	6,049	3,322	3,329	1.817	1.821	0.998

Source: *Der Fischer Weltalmanach '92*, Fischer Taschenbuch Verlag, Frankfurt a.M., 1991, S.962-963.
Der Fischer Weltalmanach '96, Fischer Taschenbuch Verlag, Frankfurt a.M., 1995, S.1115-1116.
 Jan van Harsseel (1994): *Tourism. An Exploration*, Third edition, Prentice-Hall International, Englewood Cliffs, p.11.
 Original source stems from the World Tourism Organization in Madrid.

Europe and North America have seen the most developed international tourism. There were seven European countries among the top ten which received more than fourteen million foreign tourists in 1992. France ranked first, followed by Spain and Italy. Four other European countries and three in North America also received more than ten million foreign tourists. Turkey ranked only seventeenth with about 6,549,000 foreign tourists in 1992 (Tab. 1).

But if we compare the growth rate of international tourism, it is Turkey that has seen the most rapid growth in numbers of foreign tourists. Only Turkey recorded a threefold increase in foreign tourists between 1985 and 1992. Foreign visitors increased slightly more than two times in Spain, Italy, Hungary, Hongkong and Malaysia. The other countries among the top twenty recorded less than twofold increases. Turkey seems to be the most successful country in international tourism in the last decade, to judge from this statistics. Why and how could Turkey become such a country? The purpose of this paper is to describe the development of international tourism in Turkey as a receiving country, to explain it, paying attention to the behavior of important actors in this sphere, and finally to point out problems which have occurred through the development of tourism.

2. Growth of foreign tourists into Turkey

Hütteroth (1982, S.438), a German geographer specialized in Turkey's regional geography, pointed out at the beginning of the 1980s that tourism had not yet developed in Turkey and that the number of foreign tourists had been far fewer in this country than in Spain, Italy and Yugoslavia. He found this surprising in view of the abundance of ancient cultural monuments, exotic bazaars in many cities and interesting life in the rural areas, very beautiful natural landscape and last but not least sunshine along the beaches in Turkey. These tourism resources in this country are no less attractive than those in the other Mediterranean countries mentioned above (Hütteroth, 1982, S.446).

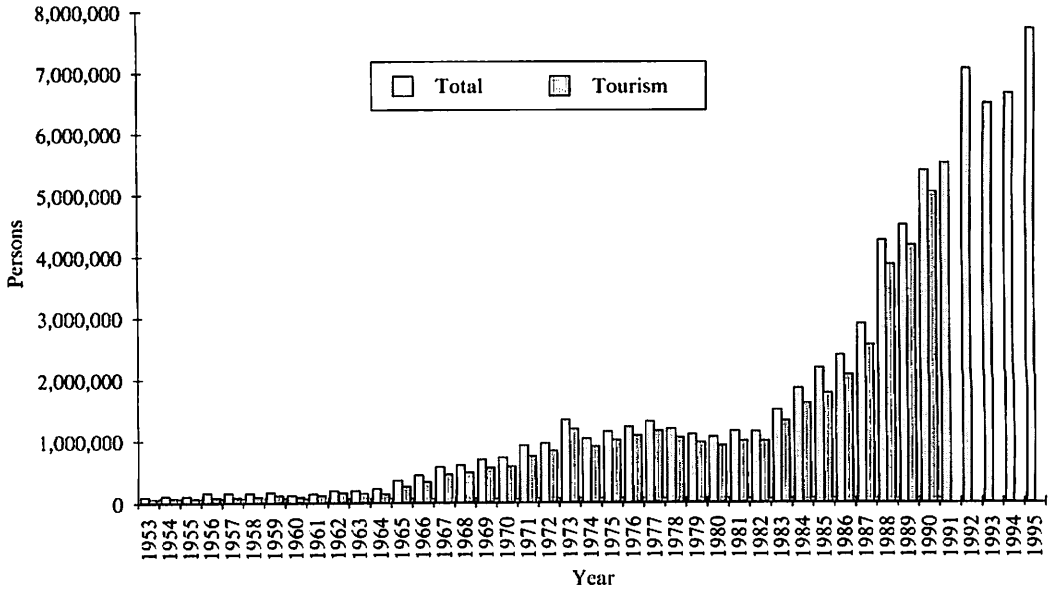
The number of foreigners arriving in Turkey gradually increased in the 1960s and this tendency continued until 1973, but stagnated after this year of the first oil crisis until 1982 (Nakabayashi, 1996, p.29; Fig. 1). According to the other statistical material, there seems to have been some stagnation in the mid 1980s as well, although more foreigners arrived in Turkey in this period than until the beginning of the 1980s¹⁾. At any rate, tourists have almost always accounted for more than 80 per cent of the total number of foreigners arriving in this country since 1968 and more than 90 per cent since 1988.

Foreign tourists in Turkey really began to increase rapidly in 1983 and especially between 1988 and 1992. But we should pay attention to some fluctuation. Numbers suddenly decreased in 1993, stagnated in 1994, and rose again in 1995. The number in 1996 will probably be more than in 1995, since the first half year of 1996 recorded more than in the first half year in 1995 (Fig. 2). A director of the Ministry of Tourism in Turkey assured me firmly that there will be more foreign tourists in 1996 than in the previous year, when I visited his office and interviewed him in August, 1996.

The rapid growth of international tourism has contributed to offsetting the trade deficit. Turkey, however, saw a negative balance between tourism receipts and

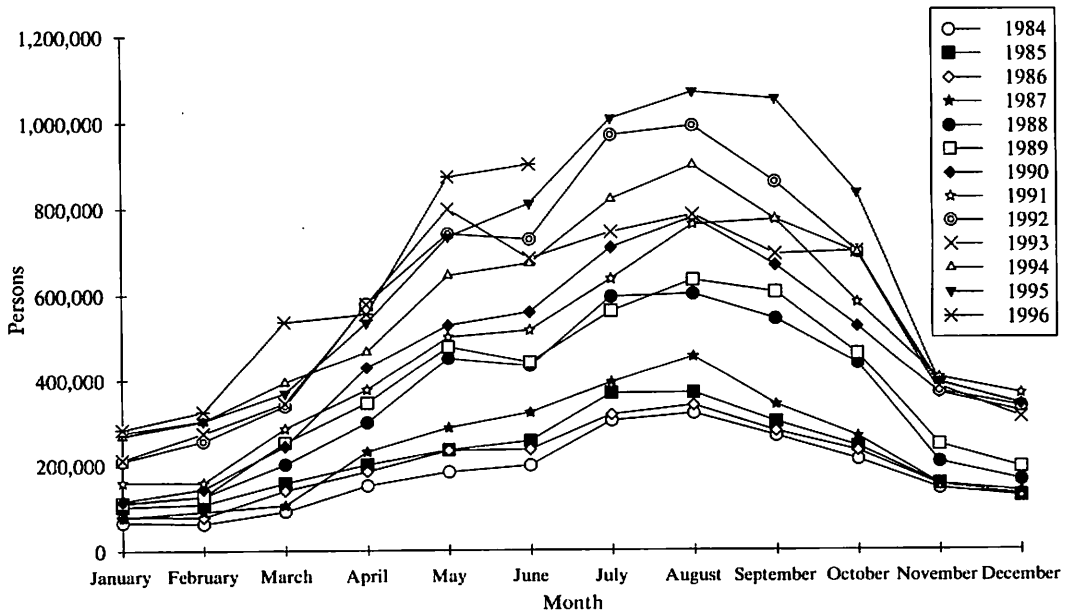
expenditures in the 1960s, although the number of foreign tourists into Turkey surpassed the number of Turkish tourists abroad²⁾. It was due to the very low average expenditure of foreign tourists in Turkey. This amounted to less than 40 US dollars

Fig. 1 Foreigners arriving in Turkey by purpose of travel, from 1953 to 1995



Source: Ministry of Foreign Affairs, Turkish Republic through internet: <http://inter.mfa.gov.tr/GRUPE/statisti.htm> (between 1953 and 1990).
 Informationsabteilung des Türkischen Generalkonsulats in Frankfurt a.M. Original source stems from General Directorate of Security, Turkey (between 1991 and 1995).

Fig. 2 Seasonal fluctuation of arrivals of foreigners into Turkey by months, from 1984 to 1996



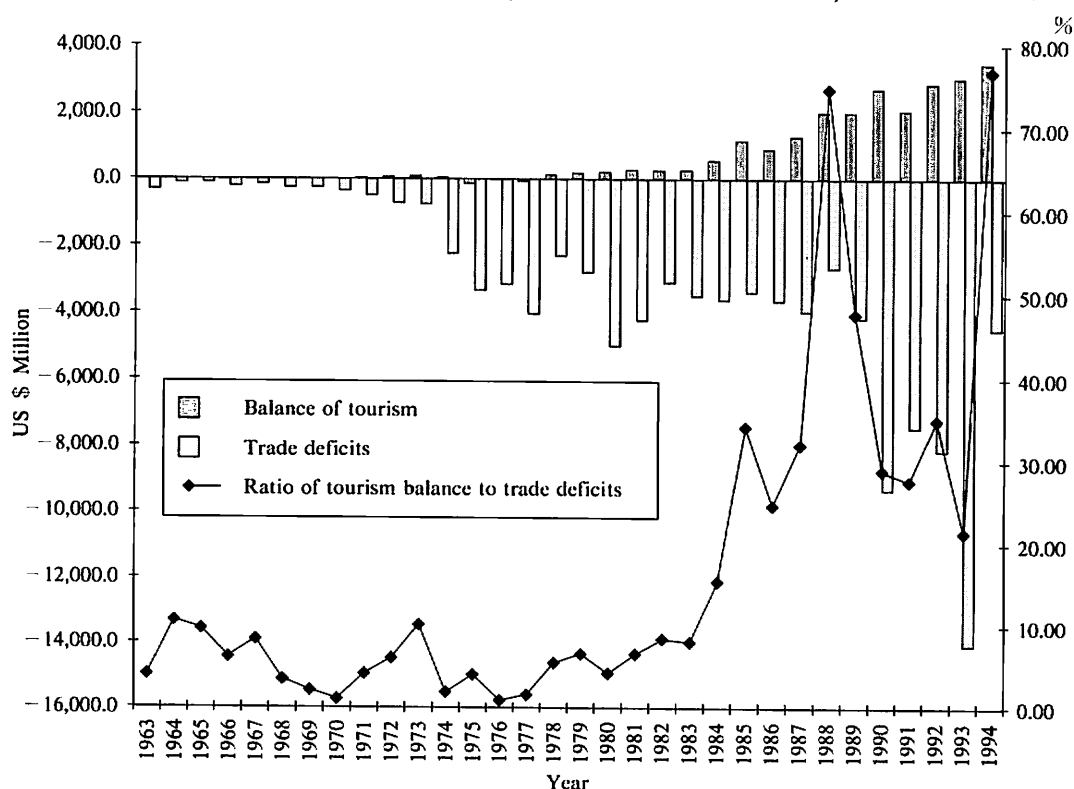
Source: Informationsabteilung des Türkischen Generalkonsulats in Frankfurt a.M. Original source stems from General Directorate of Security, Turkey.

until 1968, while Turks traveling abroad at that time spent between 130 and about 200 US dollars (Ministry of Tourism, 1995b, p.89). Turkey suffered from trade deficits which were thus worsened further through tourism deficits. Therefore, in 1963, the Turkish government set up a program in the First Five Year Plan to eliminate tourism deficits by 1965 (Ministry of Tourism, 1995b, p.92-93). It eventually achieved this aim in 1970.

Turkey has been able to enjoy a surplus in its tourism balance since 1970, with the exception of the period between 1975 and 1977, and the surplus has grown steadily. On the other hand, this country has always seen trade deficits. Although the amount of trade deficits has been very large, Turkey has been able to offset more than 20 per cent of trade deficits with the tourism balance since 1985. In 1988, when international tourism to Turkey leaped up, the proportion of the tourism balance to trade deficits reached more than 70 per cent. Because of the huge trade deficits between 1990 and 1993, that proportion decreased to less than 40 per cent. This, however, rose up again more than 70 per cent in 1994, when trade deficits declined slightly (Fig. 3).

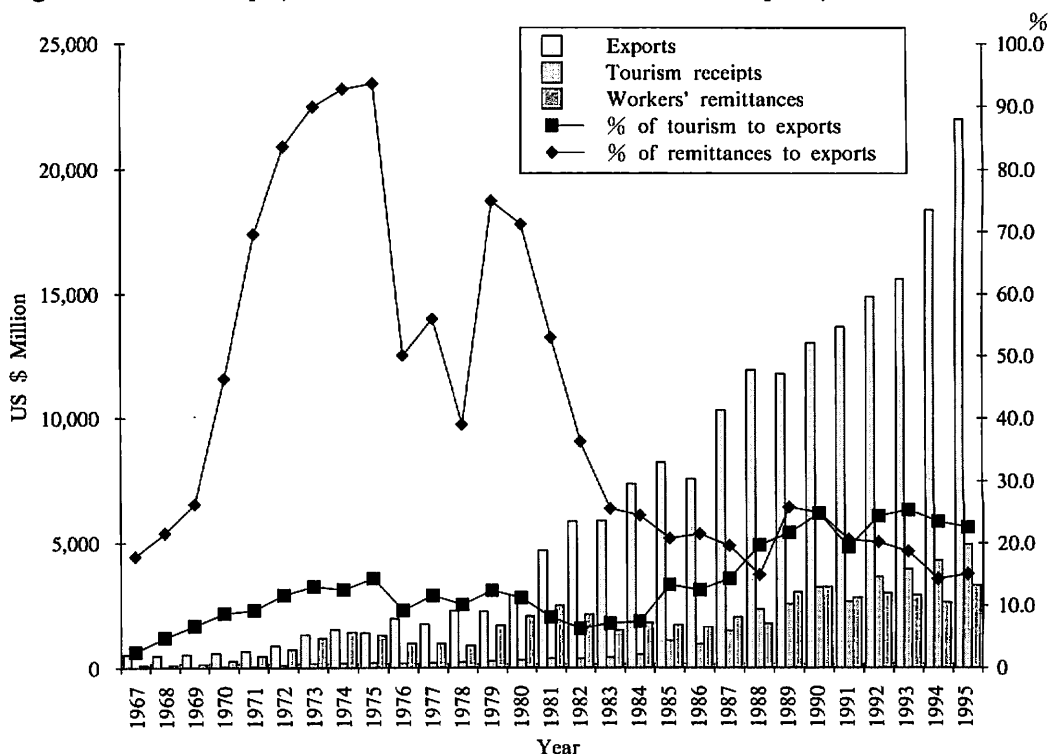
We should also refer to workers' remittances, when we examine the balance of payment in developing countries. Turkey has been one of the most well-known emigrant countries since the beginning of the 1960s. A large number of Turkish laborers work in West European countries and send their earnings to their families or relatives living in the home country. After the first oil crisis, the Turkish Employment Service

Fig. 3 Balance of tourism receipts and expenditures and trade deficits, from 1963 to 1994



Source: Ministry of Tourism, General Directorate of Investments. Department of Research and Evaluation (1995): Bulletin of Tourism Statistics, p.101.

Fig. 4 Tourism receipts, workers' remittances and merchandise exports, from 1967 to 1995



Source: The Central Bank of the Republic of Turkey: Balance of Payments Statistics of Turkey, 1996.
 Martin, Ph.L. (1991): *The Unfinished Story: Turkish Labour Migration to Western Europe*, ILO, p.34.

began to send its countrymen to some Arab countries with petroleum resources as well (Martin, 1991, pp.21-33). Migrant workers into both West Europe and Arab countries have contributed to offsetting trade deficits with remittances. In the 1970s, workers' remittances were very important for acquisition of foreign currency and their proportion to the total merchandise exports amounted to even more than 90 per cent in 1974 and 1975. The degree of contribution has, however, relatively decreased since the beginning of the 1980s and the ratio of workers' remittances to exports is now smaller than 20 per cent (Fig. 4).

Tourism receipts exceeded workers' remittances for the first time in 1988, though they were almost equal between 1988 and 1991. However, since then international tourism has become much more important for the current account of the Republic of Turkey than workers' remittances. No single manufacturing sector, with the exception of the textile industry, could earn more foreign currency than the tourism sector in 1991³⁾.

Although it is not clear how much employment has been generated through the development of international tourism, there is no doubt that many people are employed directly in the tourism industry such as travel agents, hotels, restaurants, souvenir shops, transportation specialized in tourism and so on. According to *Süddeutsche Zeitung* (17. Jan. 1996), only one per cent of employed persons are engaged in tourism in Turkey. It is much less than in Greece (ten per cent), Spain (nine per cent) and other countries with developed international tourism. But if we include some other industries which are related to the tourism industry such as

Tab. 2 Comparison of foreigners arriving in Turkey by country of nationality

Rank in 1984	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	Rank in 1995
	Rank in 1984												
	Name of Country												
1	Germany	241,712	299,509	388,192	523,675	767,905	896,989	973,914	779,882	1,118,750	994,301	1,656,310	1
2	U.S.A.	213,345	196,261	79,614	130,557	165,401	204,502	205,831	79,256	182,429	271,166	290,220	4
3	Yugoslavia	179,705	366,473	366,302	343,733	290,498	217,266	325,703	158,699	169,854	118,754	70,034	16
4	Greece	179,284	213,222	211,308	173,818	430,331	277,333	227,709	138,918	147,174	127,005	154,142	10
5	Iran	175,454	353,731	180,807	165,541	233,838	240,972	253,452	150,168	119,692	231,392		
6	France	103,359	149,950	143,971	168,566	246,784	283,545	310,809	117,070	247,603	301,009	251,602	6
7	Syria	94,146	53,756	64,182	74,101	85,914	92,860	112,716	119,872	123,108	119,387		
8	United Kingdom	89,709	124,677	154,231	266,900	465,142	405,943	351,458	200,813	441,817	568,284	734,634	3
9	Austria	71,151	76,705	60,365	75,897	118,259	156,875	196,561	102,071	204,662	211,337	181,707	8
10	Italy	65,856	74,803	87,622	102,358	144,322	154,083	156,342	64,134	158,185	134,669	108,231	12
11	Bulgaria	59,800	19,653	9,135	4,609	9,098	15,626	72,741	943,250	818,895	368,813	170,587	9
12	Cyprus	56,313	53,641	39,150	50,748	52,447	63,677	52,782	45,733	55,961	66,536	71,092	
13	Poland	46,301	88,339	63,311	55,945	166,470	196,376	206,682	184,008	111,931	51,562	33,952	21
14	Hungary	44,070	37,486	32,615	28,243	61,323	194,391	172,357	164,903	148,131	98,921	16,194	23
15	Saudi Arabia	38,981	40,067	40,874	36,058	32,708	27,338	16,417	15,083	19,423	21,077		
16	Libya	34,225	39,360	16,646	67,911	95,805	43,620	22,557	20,450	11,564	9,233		
17	Jordan	32,422	25,041	25,648	29,296	27,211	22,878	17,039	15,324	22,356	26,758	62,806	18
18	Switzerland	28,143	36,272	39,783	47,872	67,662	77,945	76,368	41,606	78,735	82,853	47,639	
19	Netherlands	27,098	31,217	39,450	49,915	81,039	106,709	150,337	107,018	204,802	216,182	203,001	7
20	Belgium	21,707	20,138	20,731	24,061	39,207	47,533	56,258	33,763	75,071	88,120	107,474	13
22	Spain	19,386	18,853	21,955	27,896	44,283	56,176	62,220	24,944	47,318	63,120	28,786	22
23	Finland	10,225	13,032	17,013	20,505	48,710	69,626	104,321	80,511	104,190	96,359	102,412	15
25	USSR (C.I.S.)	15,302	11,711	16,532	19,932	22,013	43,369	223,211	731,869	1,241,010	1,167,044	1,430,107	2
29	Israel	6,923	4,770	9,874	23,214	25,076	41,058	40,064	46,043	49,858	100,748	303,920	
27	Czechoslovakia	9,873	5,764	5,798	6,801	8,199	11,942	66,224	217,232	126,773	75,176	32,638	20
21	Romania	20,231	12,993	16,967	13,583	16,067	13,223	377,273	503,785	566,665	311,235	283,013	5
28	Denmark	7,828	8,665	14,349	18,946	30,517	32,362	34,507	32,320	64,016	79,369	104,636	14
26	Sweden	10,082	10,938	15,002	27,952	43,393	66,761	110,204	69,344	120,248	87,021	93,852	11
30	Norway	6,289	6,327	9,070	17,164	21,174	25,735	39,889	24,590	42,482	54,332	52,360	19
24	Japan	13,060	16,811	16,740	21,067	28,008	32,298	35,358	18,479	36,398	47,317	63,745	17
	Foreigners in total	2,117,094	2,614,924	2,391,085	2,855,546	4,172,727	4,459,151	5,389,308	5,517,897	7,076,096	6,500,638	6,670,618	7,726,886

Source: Informationsabteilung des Türkischen Generalkonsulats in Frankfurt a.M. Original source stems from General Directorate of Security, Turkey.

Note: The source does not mention the successors of former Yugoslavia and Czechoslovakia.

agriculture, construction and so on, the economic effect of international tourism must be enormous in Turkey.

What kind of factors have been important for the development of international tourism in Turkey? It is of course not business, but leisure, that is important for the development of international tourism into this country in the last decade. Many tourists come from West European countries as well as from neighboring ones including Yugoslavia. Tab. 2 shows changes in the number of foreigners arriving in Turkey by nationality between 1984 and 1995. The difference between the number of arrivals from Germany and that from the other country such as the USA, Yugoslavia, Greece and Iran was not great in 1984, when more and more tourists had just begun to come to Turkey. Those who came from neighboring countries, including Yugoslavia, seem to have visited Turkey not because of leisure activities but for other purposes such as shopping. Höhfeld (1995, S.182) writes that tourists from neighboring countries visit Turkey mainly for the sake of shopping, because there are plenty of kinds of goods and prices are cheaper in Turkey, and the length of their stay in the country is usually short. A considerable number of tourists also came from former European socialist countries, especially from Poland, Hungary and former Czech-Slovakia, in the period between the end of the 1980s and the beginning of the 1990s. It is not clear if they were tourists for leisure or for shopping. At any rate, it is visitors from Germany that increased most rapidly in the second half of the 1980s. United Kingdom and France followed Germany.

Turkey also witnessed a rapid increase in tourists from the other former European socialist countries than those mentioned above in the early 1990s. The influx of Bulgarians in 1991 and 1992 was caused by the arrival of refugees of Turkish ethnicity. A large number of Russians began to come to Turkey in the 1990s. Russian tourists may be divided into three groups; first, wealthy Russians who can afford to enjoy vacations in Turkey; second, those who have the objective of shopping as business; and third, those who work in Turkey. Israeli tourists increased rapidly from 1993. They also enjoy vacations, especially in Antalya, the capital city of the province with the same name on the Mediterranean Sea and a regional center of international tourism in Turkey. According to interviews with informed persons in Turkey, Israelis come to the country to enjoy games in casinos attached to luxury hotels. Casinos are forbidden in Israel, and Antalya is not far from Israel. The increase in Russian and Israeli tourists is reflected in signboards written in their languages everywhere in the amusement quarters of Antalya.

At any rate, it is Germany and United Kingdom that have sent most tourists for leisure to Turkey and their numbers have grown very rapidly since the mid 1980s. The seasonal fluctuation in the number of arrivals of foreigners also proves that many of them come to Turkey for summer vacations. The fluctuation is very strong as shown in Fig. 2. We can say on the basis of the evidence mentioned hitherto that international tourism in Turkey reached the stage of mass tourism in the mid 1980s. There is no doubt that international tourism in Turkey rests on the development of mass tourism in West European countries, above all in Germany.

The mere existence of the excellent tourism resources which Hütteroth (1982) mentions is not sufficient for the development of mass tourism. International mass tourism is not a purely natural phenomenon. It is, rather, intentionally created by business activities, based on the fact that the people in sending countries can afford

to spend their money on holiday activities abroad. Of course, it is also important for the development of international mass tourism that travel becomes common practice or a way of life in sending countries. We should take such factors in sending countries into consideration in order to explain the development of international mass tourism. The present author, however, is concerned here with forces which promote the tourism potential from the Turkish side. Government policy has been one of the most important factors⁴⁾. The Ministry of Tourism itself writes that insufficient promotional activities was the reason why international tourism was slack until the mid 1980s (Ministry of Tourism, 1995a, p.82).

3. Development policy of the Turkish government for promoting international tourism

In Turkey, there is a ministry which is engaged with promotion of tourism. According to the General Directorate of Information of the Ministry of Tourism, the forerunner of the Ministry of Tourism of today was the Ministry of Press, Information and Tourism which was founded 1957. The main object of this forerunner was to acquire foreign currency through promoting international tourism. It also had a secondary aim, to promote domestic tourism for Turkish people. This ministry, however, seems not to have been active in promoting international tourism, because a semi official report mentions nothing about this ministry (Ministry of Tourism, 1995a, pp.82-83). There is no doubt that it was too early to speak of international mass tourism in the 1950s. A senior official whom the present author interviewed in August 1996 also did not explain the activities of the ministry in the 1950s in detail.

The ministry was reorganized in 1963 and the Ministry of Tourism and Information was founded. In that year, the Turkish government adopted a five-year plan for the development of the Turkish economy and its related infrastructure. Tourism development policy was situated in the framework of the first Five-Year Plan (Ministry of Tourism, 1995c, p.6). The Ministry of Tourism and Information was, however, not active in promoting international tourism in the 1960s any more than its forerunner. Mass tourism in West European countries began to develop just in those days⁵⁾. It was still too early for Turkey to attract a large number of foreign tourists from West European countries.

According to the Ministry of Tourism (1995a), it was at last in the 1970s that the Turkish government took a fairly serious interest in tourism. This report does not, however, explain it in any detail. The present author interviewed a former official of the Ministry of Tourism and Information in summer 1996. This informed man had worked at the Department of Planning in the ministry between 1971 and 1981. According to him, responsibility for planning the promotion of international tourism was held not by that ministry, but by the State Planning Organization until 1972. This organization entrusted a Danish consultant company with development planning of tourism centers with facilities for accommodation, etc., at a number of places along the Aegean and Mediterranean coasts. As a result, a series of reports were issued and State Planning Organization (1971) was one example. The Turkish government, however, did not adopt the plan proposed by the Danish consultant company. According to the ex-official, the reason was the bad quality of the planning. The

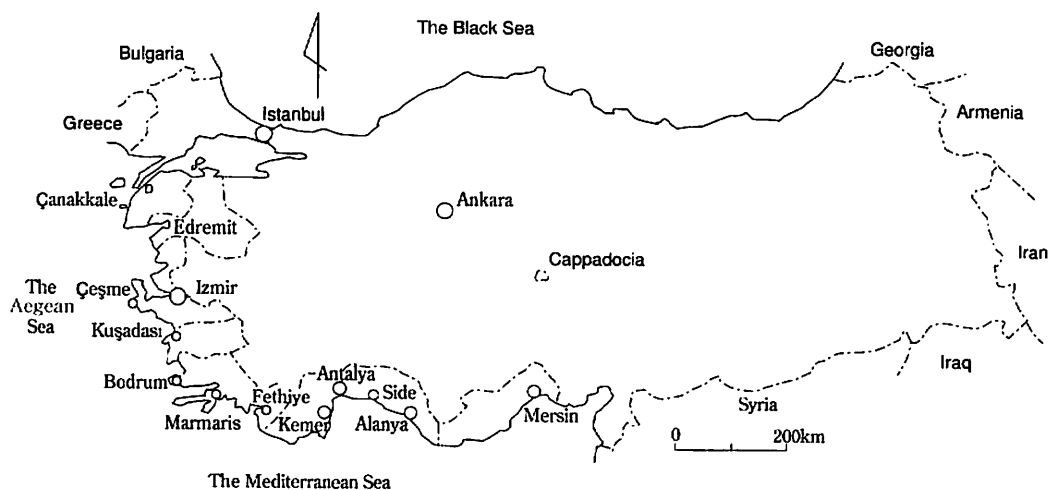
consultant company presented plans to construct high-rise hotels in every tourist center. The Turkish government did not welcome such a plan. We may well, however, guess that the real reason for the rejection might have been a financial problem.

Before infrastructure such as a road of high standard between Antalya through Kemer to Kaş was provided, a holiday village was already opened at the beginning of the 1970s in Kemer. Kemer is located about 40 km south of the city of Antalya and is centrally situated in South Antalya. The holiday village was constructed jointly by an Italian company and a Turkish bank. It was managed jointly by the Italian company and Club Méditerranée, a French enterprise (Rauh, 1979, S.50). After this holiday village was opened, the Turkish government started to develop the infrastructure for South Antalya. It began to plan its development in 1974 and obtained financial support of 26 million US dollars from the World Bank in 1976. The construction of the road was finished in 1978, but only as far as Kemer. International tourism in Antalya province did not become mass tourism yet in the 1970s. According to a person who was president of the regional executive committee in Antalya of TÜRSAB⁶⁾ in 1995, a number of foreign tourists began to visit the Antalya province in the form of study tours for the ancient heritage in 1974. The first study tour traveling in this province was organized by a German tour operator, Studiosus. This type of travel cannot be, however, called mass tourism, because the number of participants in the study tour was restricted and it was rather expensive⁷⁾.

In spite of unfavorable economic and political conditions, the Ministry of Tourism and Information made every effort in the 1970s to promote international tourism to Turkey. The development of infrastructure mentioned above was one example. Robinson Club, a subsidiary of TUI⁸⁾, was opened after the completion of the infrastructure in South Antalya (according to the interview with the ex-official). This might well be a fruit of the policy. Local government was also eager to promote international tourism by the end of the 1970s. The mayor of Antalya, for example, visited Cologne, West Germany, in 1978 and through a television broadcast appealed to his countrymen working there to come back to Turkey and to invest in the tourism sector with their savings. He promised every support, if they invested in Antalya. Responding to the mayor's appeal, a Turkish guest worker who had come from central Anatolia and been employed by a company in the suburbs of Düsseldorf, came back to Antalya in order to manage a *pension*. However, there were only a few cases as such in Antalya, as far as the returnee knows. He was not a guest worker any more, just before he came back to Antalya. He had resigned his company in 1976 and managed a pub in the suburbs of Düsseldorf (Interview with the returnee living in Antalya).

As shown in Fig. 1, between 1973 and 1982, there was no remarkable progress of international tourism into Turkey, because of the first oil crisis, outbreak of the Cyprus problem, and the restricted budget of the ministry. It was not till the 1980s that the Turkish government launched a serious development policy for international tourism (Ministry of Tourism, 1995a, p.82). A military *coup d'état* occurred in September 1980 and a government nominated by the military controlled the country until December 1983 (Çevik, 1993, p.39, pp.119-120). Under this regime⁹⁾, Turkey started promoting international tourism in earnest. The Ministry of Tourism and Information was reorganized and the Ministry of Culture and Tourism was born in 1980. Cultural heritage and museums are attractions for international tourists. The

Fig. 5 Main resort cities and areas in Turkey



government realized this fact and amalgamated the section for tourism promotion and the Ministry of Culture into the new ministry (interview with the Directorate of Information, Ministry of Tourism, in August 1996).

A question of vital importance for receiving countries of international tourism is whether there are enough accommodation facilities of the international standard to welcome foreign tourists. The bed capacity in Turkey was only about 45,000 in 1976, including also motels, holiday villages, *pensions*, camping places, apart hotels, inns (*oberj*) and so on (Statistisches Bundesamt, 1989, S.95). There were only a few cities which had more than 1,000 beds in the mid 1970s, namely Istanbul, Ankara, Izmir and Kuşadası. Accommodation capacity was rather larger in Antalya, Alanya and Marmaris than in the other places along the Aegean and Mediterranean coasts, but there were only between 500 and 1,000 beds in these three cities (Ritter, 1977, S.38). Hütteroth writes that only Kuşadası, Çeşme, Marmaris and Bodrum attracted a lot of foreign tourists among the Aegean and Mediterranean coastal regions in the 1970s. It was not till about 1980 that two cities along the Mediterranean Sea, Antalya and Alanya, joined those small cities along the Aegean Sea as resorts (Hütteroth, 1982, S.446). According to the Turk mentioned above who returned to Antalya with the aim of participation in the tourism industry, there were only two hotels and five *pensions* which could offer foreign tourists accommodation of European standard in the city of Antalya at the beginning of the 1980s.

The Turkish government enacted the Tourism Encouragement Law No.2634 in 1982 in order to promote international tourism. Under this law, tourist regions, areas and centers were designated and investment in tourism facilities was encouraged (Çevik, 1986, pp.281-287), while the state itself was to be in charge of investment in infrastructure. The designated tourism regions extends along the Aegean and Mediterranean coastline from Çanakkale to Mersin with a width of three km, including Cappadocia on the basis of the "Tourism Development Study of Western Turkey" and "Physical Study for Tourism in Turkey" (Çevik, 1986, pp.272). In spite of these government measures, the number of beds increased only slightly from just over 50,000 in 1979 (Çevik, 1982, p.422) to 64,000 in 1983 in the whole country (Statistisches Bundesamt, 1989, S.95). Because the Turkish government had already

planned construction of about 600,000 beds capacity in those designated regions (Tab. 3) and wanted to accomplish the target as quickly as possible, it amended policies for international tourism in 1983 and became more eager to encourage investment not only from domestic capital but also from foreign sources (Çevik, 1986, pp.268). The ex-official of the Ministry of Tourism and Information said that the real promotion of the tourism industry began under the government formed by Özal after the democratic general election in 1983.

Since then, the Turkish government has offered foreign and domestic companies several kinds of incentives for investment in the construction and management of tourist facilities, provided that the investors fulfill certain conditions in relation to the size of investment. The investors can enjoy the benefits of the following incentives:

- allocation of public land for the construction of tourist facilities on long-term lease,
- long-term loans with lower interest from the Tourism Bank¹⁰⁾, up to 60 per cent of the total investment cost,
- low-interest and long-term loans from the Tourism Development Fund (up to 15 per cent of the total investment cost for capacities over 300 beds,
- exporter rights,
- permission to employ foreign personnel and artists,
- discount tariff rates on water, electricity and gas prices,
- priority in allocation of telephone, fax and telex lines,
- customs tax exemption: mechanical or electronic equipments, and other necessary equipments or materials not produced locally, are subject to customs duties exemption,
- investment allowance from the State Planning Organization,
- property tax exemption for five years,
- transferability of the profit for foreign investors,
- foreign exchange retention quotas: a percentage of foreign exchange earned by tourist establishments may be retained by the investors and used for essential imports required for operation,
- corporation income tax exemption: maximum 20 per cent of the foreign exchange earnings of tourist establishment is deducted from the total gross profit subject to taxation,
- cash rebate which is provided by the Central Bank of Turkey up to 20 per cent of fixed investment cost in cash as means of financial support. (Çevik, 1986, pp.278-279)

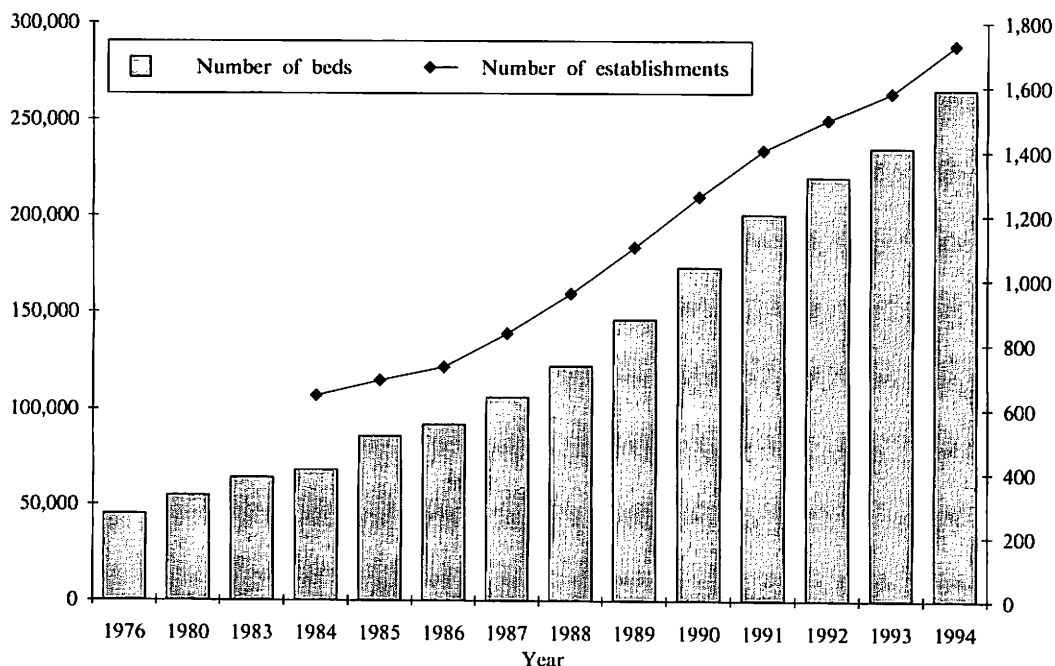
Foreign investors may have an equity share up to 49 per cent of the total investment

Tab. 3 Planned bed capacity in the areas designated for tourism

Tourism area	Planned bed capacity
Edremit-Burhaniye	44,600
Ayvalık-Küçükköy-Altınova	16,000
Bergama-Dikili	38,400
Foça-Yenifoça	6,000
Çeşme-Karaburun	66,800
Seferihisar-Dilek	70,700
Yenihisar-Güllük-Akbük	51,050
Bodrum-Karatoprak	32,250
Gökova-Körfezi	13,100
Datça	19,000
Marmaris-Bozburun	17,300
Köyceğiz	10,550
Fethiye-Dalaman	80,200
Kaş-Finike-Kumluca	20,350
South Antalya	25,100
Serik-Manavgat	55,100
Side Turizm Gelişim Projesi	12,900
Cappadocia	15,000
Total	594,400

Source: Çevik (1986, p.276)

Fig. 6 Increase in bed capacity and establishments for accommodation in Turkey, from 1976 to 1994



Source: Ministry of Tourism, General Directorate of Investments. Department of Research and Evaluation (1995): *Bulletin of Accommodation Statistics 1994*.

Statistisches Bundesamt (1989) *Landesbericht Türkei 1989*. Metzler Poeschel, Stuttgart, S.95

for accommodation facilities, if these have bed capacity between 100 and 200. If the bed capacity is more than 200, foreign investors can have an equity share up to 100 per cent of the total investment (Çevik, 1986, pp.278).

Accommodation facilities have been constructed one after another for the promotion of international tourism since the mid 1980s. The ex-official mentioned above, for example, resigned from the ministry in 1981 and came to Antalya in 1984 in order to establish an auto camp with various facilities such as a restaurant, a swimming pool and so on. He opened his auto camp in 1986 in Beldibi, a small hamlet located between the city of Antalya and Kemer.

As a result of the "encouragement policy" of the Turkish government, the capacity of accommodation has increased very rapidly since 1986 (Fig. 6). It increased most in Antalya, followed by Muğla, among all the provinces in Turkey. The Antalya province has now almost twice as many beds in tourist facilities licensed by the Ministry of Tourism as does Istanbul. Moreover the average size of hotels is larger in Antalya than in any other province. Within Antalya province, Kemer and Alanya are head and shoulders above the rest in the number of beds. On the other hand, the size of hotels, holiday villages and so on is much larger in Serik, Side and Manavgat than in Kemer and Alanya (Tab. 4).

It is not clear whether the main source of investment in tourism facilities was either foreign companies or domestic ones. It is, however, certain that the USA and Germany preponderate over any other foreign sources. And among domestic capital, the owners of large-sized textile and construction companies have invested eagerly in the international tourism sector, especially in Antalya province. A number of luxury hotels in this province were in hand of such people (according to interviews with

Tab. 4 Bed capacity and establishments in main tourism districts, 1994

Name of district	Name of province	Number of beds	Number of establishments	beds per establishment
Merkez	Çanakkale	1,060	11	96.4
	Çanakkale total	1,531	17	90.1
Ayvalık	Balıkesir	2,455	15	163.7
Burhaniye		876	6	146.0
Edremit		1,292	12	107.7
Erdek		1,021	10	102.1
	Balıkesir total	6,829	56	121.9
Konak	Izmir	5,983	34	176.0
Çeşme		4,025	24	167.7
Foça		1,109	5	221.8
Menderes		1,060	10	106.0
Seferihisar		1,912	9	212.4
Selçuk		884	12	73.7
		Izmir total	16,423	113
Kuşadası	Aydın	15,757	75	210.1
Didim		1,330	9	147.8
	Aydın total	18,726	106	176.7
Bodrum	Muğla	10,962	86	127.5
Datça		1,598	7	228.3
Fethiye		6,979	27	258.5
Köyceğiz		653	6	108.8
Marmaris		14,982	96	156.1
Milas		963	5	192.6
	Muğla total	36,649	233	157.3
Merkez	Antalya	7,523	65	115.7
Alanya		21,507	110	195.5
Kaş		830	14	59.3
Kemer		21,967	83	264.7
Manavgat		8,652	22	393.3
Serik		3,853	6	642.2
Side		11,711	25	468.4
	Antalya total	76,638	335	228.8
Mersin	Içel	3,261	23	141.8
		Içel total	5,381	44
Merkez	Nevşehir	2,544	14	181.7
Ürgüp		2,096	11	190.5
	Nevşehir total	5,629	30	187.6
Istanbul		38,486	261	147.5
Ankara		9,353	67	139.6
Turkey surveyed		251,230	1,614	155.7

Source: Ministry of Tourism, General Directorate of Investments. Department of Research and Evaluation (1995): *Bulletin of Accommodation Statistics 1994*.

various experts). It is noticeable that the textile industry capital is a key for the acquisition of foreign currency in the tourism sector as well as in the manufacturing sector.

Mass tourism began in Antalya in 1985. The first package tour to Antalya for the general public was organized by a German tour operator, Neckermann (NUR)¹¹. Since then more and more foreign tourists have come to Turkey, especially to Antalya province. This was possible partly because foreign and domestic companies invested heavily in this province. But investment by private companies is not a sufficient condition for the development of international tourism. Not only accommodations but also manpower had to be provided for the tourism sector. The Turkish government plays an important role in this sphere as well, and has supported manpower training. It is, for example, an important policy to train travel guides who can explain Turkish culture and heritage accurately in foreign languages as well as other manpower for the tourism industry such as cooks and hotel staff.

According to the Turk who began to manage a *pension* in Antalya in 1980, the Ministry of Tourism and Culture offered a training course for travel guides for the first time for Antalya province in 1980. 28 persons participated in the course after the successful entrance examination, and 24 passed the graduation examination. Most of them were English-language travel guides. There were also two travel guides for German among the 24 persons. Both were returnees from Germany and one of them was the owner of the *pension*. Among the 24, many travel guides were teachers at *lise* or senior high schools. According to the Directorate of Information of the Ministry of Tourism, the training course is not always available. There are now plenty of travel guides in some European languages. But as many tourists have visited from Russia and Israel, there is a shortage of travel guides for Russian and Hebrew. Therefore, the ministry recently opened training courses for travel guides in these languages. It is very difficult to enter the training course. Candidates for travel guides should have conversational ability in a foreign language and knowledge to the level of university students. According to the Representative of the Association of Travel Guides in Antalya, about 480 persons are now members of this organization. There are 266 travel guides for the German language, 157 for English and 41 for French.

The training courses for cooks and hotel staff are always available in twelve places. Many of them are located in small towns along the Aegean and the Mediterranean such as Selçuk, Alaçatı and Kemer besides large cities such as Ankara, Istanbul, Izmir and Antalya. About 1500 persons are trained at the courses annually. It was the beginning of the 1980s that the ministry in charge of tourism promotion began to open the courses (according to the Directorate of Information, Ministry of Tourism).

In 1989, the Ministry of Tourism and Culture was divided into the Ministry of Tourism and the Ministry of Culture. This reorganization does not mean a change of tourism policy. It is merely a result of cabinet changes, according to the Directorate of Information, Ministry of Tourism. The Ministry of Tourism not only supports construction of accommodation facilities, but also supervises their management so that the quality of accommodation should be maintained. Within the ministry, there is a section which is responsible for the inspection of hotels, holiday villages and so on. Travel agencies and their association are also strictly controlled by the ministry. TÜRSAB was established in 1972 according to the Law No.1618 which has the

purpose of regulating the tourism industry and the operation of travel agencies (Association of Turkish Travel Agencies, 1994, p.3).

Publicity is also decisive for the development of international tourism in Turkey. The Turkish government plays an important role in the sphere of marketing. The Ministry of Tourism has spent from 20 million to 30 million US dollars annually in recent years for participation in various international fairs for tourism, inviting journalists from various countries for travel within Turkey, and advertising in foreign newspapers and magazines. In 1995 it spent 34 million US dollars (according to the Directorate of Information, Ministry of Tourism). There are now information offices of the Ministry of Tourism abroad in twenty countries. The ministry has three offices in Germany, namely in Frankfurt am Main, Munich and Berlin. In the USA there are Turkish information offices for tourism in two cities, and there is only one office in each of the other countries. Because there were two offices already in the mid 1980s only in Germany among fifteen countries where the ministry located its branch offices abroad (Çevik, 1986, p.293), it is clear that Germany has been the most important market for the tourism industry in Turkey.

4. Crises of international tourism in the 1990s and the role of tour operators

As we have already seen, the number of foreign tourists fluctuated considerably. There is no doubt that political conditions have been responsible for this. Turkey witnessed a sharp increase in foreign tourists in 1992. This was attributed partly to the civil war in former Yugoslavia which broke out in June 1991 with the independence declarations of Slovenia and Croatia as a trigger, extending to Bosnia-Herzegovina in 1992. Tourists who had been customers for former Yugoslavia had to go to another country, if they wanted to enjoy their vacation along the Mediterranean coast. The Gulf War between 1990 and 1991 and its end had some influence on the stagnation of the number of foreign tourists in 1991 and its rapid growth in 1992, as well as the civil war in former Yugoslavia.

The civil war in the former Yugoslavian area changed the stream of tourists from West European countries to Turkey. Before the civil war, a large number of tourists came to Turkey through the former Yugoslavian territory by automobile. Because of danger in that area and because of the cost of a detour, for example through Italy and by car ferry, the number of individual tourists with automobiles decreased greatly. Instead, holiday package tourists who come to Turkey by airplane have increased. Such holiday packages are usually combined with hotels of higher standard. Because of this it has become more and more difficult to manage small-sized *pensions*. Most *pensions* located in the old city, Kaleiçi, of Antalya, suffer from unprofitability because tour operators guide tourists to hotels by means of holiday packages in which airplane and hotel are combined. The Turk mentioned above who runs a *pension* in Antalya has recognized that the situation has changed, and has decided to retire and to hand over the management of his *pension* in 1997. His son had no wish to take over the business.

However, there are also problems for the tour operators and hotels of higher standard which organize package holidays and promote mass tourism. These

problems have become particularly apparent since 1993. Political conditions brought about the sudden decrease in the number of foreign tourists in this year and the stagnation in 1994. This was not due to conflicts in foreign countries, but to the one in Turkey itself. There had actually been a case of abduction of German tourists in Eastern Turkey by a terrorist group in 1991 (*Bild*, 3. Aug. 1991). Furthermore, conditions became worse in the main centers of international tourism in Turkey during 1993. The clash between the Turkish government and PKK (Party of Kurdish Workers) became intensified.

At the beginning of March 1993, the Turkish air force bombarded the district of Southeastern Turkey where Kurdish people live (*Süddeutsche Zeitung*, 5. März 1993; 8. März 1993). On the other hand, the PKK threatened citizens of West European countries, especially of Germany, just before the International Tourism Fair held annually in Berlin, if they should come to Turkey as tourists (*Die Welt*, 25. Feb. 1993). The PKK insists that the tourism industry is one of the main resources which enables Turkey to purchase weapons from foreign countries for use against Kurdish people. Therefore the PKK has declared its intention to attack tourist facilities in Turkey.

Although the Turkish government had assured foreign tourists that they would not be endangered (*Süddeutsche Zeitung*, 6./7. März 1993), by the beginning of April about 20,000 Germans had canceled their package holiday bookings in Turkey in summer 1993, because they were afraid of trouble in the country (*Bild*, 2. April 1993). Further cancellation in rapid succession was also caused by a series of bomb attacks in several cities, including Istanbul, in the middle of March, which appeared to be the work not of the PKK, but of some other radical group (*Süddeutsche Zeitung*, 17. März 1993).

On 27 June, there were several terrorist attacks in Antalya. Bombs exploded at several tourist sites in the city of Antalya one after another, and more than twenty persons, including nine Germans, were wounded (*Süddeutsche Zeitung*, 29. Juni 1993a; *Die Welt*, 30 Juni 1993). A number of large-sized German tour operators immediately reacted to this occurrence by promising that their customers could change their package holiday bookings from Turkey to another country, if they should start their holiday tour before 5 July (*Süddeutsche Zeitung*, 29. Juni 1993b; *Die Welt*, 30 Juni 1993). There were further bomb explosions in July (*Die Welt*, 19. Juli 1993).

The troubles over Kurdish people in Turkey influenced the decision-making of German tourists in 1994 as well. A quality newspaper in Germany, for example, reported about a series of troubles in Turkey, although it also described the charm of holiday tours in this country (*Süddeutsche Zeitung*, 3. Mai 1994). The number of bookings decreased rapidly at some large tour operators in Germany. Transair and Tjaereborg experienced more than 50 per cent falls in booking, and Club Aldiana, which was located in Turkey and belonged to NUR, had to be closed because of the sharp decrease of bookings by German people. Robinson Club, which belonged to TUI, was also closed temporarily. (*Welt am Sonntag*, 22. Mai 1994).

The Ministry of Tourism adopted a policy of giving foreign tour operators subsidies, if they became active in marketing tourism for Turkey in their countries. If they placed advertisements for Turkish holiday packages in newspapers and magazines, the ministry gave them subsidies, covering 50 per cent of the cost. It also bore

ten per cent of the printing cost of catalogues for package holidays in Turkey. These incentives were offered only to tour operators located in foreign countries and only in 1993 and 1994.

Tour operators and hotels adopted a strategy of price reduction in order to cope with the sharp fall in bookings. In 1994, one could buy a one-week holiday package at a four-star hotel, including flight cost between any German city and Antalya, at the price of DM 700,-, even in summer. This price was about 30 per cent cheaper than package holidays in Spain, Greece or Italy. It was a great discount, because it cost more than DM 600,- to fly between a German city and Antalya by a charter airplane in 1994 (*Die Welt*, 10. Juni 1994).

According to *Hamburger Abendblatt* (11. Juni 1994), some tour operators offered a package holiday which was steeply discounted down to between 20 and 40 per cent, in order to obtain customers, while there were tour operators which did not implement such a policy. NUR experienced a 64 per cent decrease of booking because of the latter policy. LTU, the largest charter flight company in Germany had to reduce the number of flights between Germany and Turkey from 24 to 18 per week. That discount was an important reason why Russian and Israeli as well as British tourists increased rapidly in 1994 in comparison with in 1993.

According to other newspapers, German tourists for the summer vacation decreased by about half, to 600,000, in 1994. A successful Turkish charter flight company, Sun Express, had to cut the number of flights from 65 to 12 per week. The price of a one-week package holiday fell to DM 500,-, which was no longer profitable. Such discounting of holiday packages was, however, not only due to the decrease in demand. The secretary general of the Association of Hoteliers in the Mediterranean Region¹²⁾ commented that the hotel business had been not very profitable in this region since some years ago, because there had been oversupply of accommodation. Nevertheless a large number of new hotels has been constructed continuously. (*Der Tagesspiegel*, 8. Oktober 1994; *Frankfurter Rundschau*, 15. Oktober 1994)

The number of beds is, however, much fewer in 1994 than that planned by the government at the beginning of the 1980s. On the other hand, there is certainly oversupply of tourist accommodation along the Aegean and Mediterranean coasts. Therefore, the Ministry of Tourism does not think now that more accommodation facilities should be constructed along the Aegean and Mediterranean coasts. It will develop regions along the Black Sea in order to attract more foreign tourists to Turkey (according to the General Directorate of Information, Ministry of Tourism).

The price of package holidays in Turkey is lower than in the other Mediterranean countries and lower than the profitable level. It has become more and more difficult for medium and small-sized tour operators in foreign countries to survive in the hard competition with large-sized operators, if they provide only normal package holidays. There have been some cases of bankruptcy among them in Germany (according to interviews with the secretary general of the Association of Turkey Tour Operators in Germany in August 1996).

The main actors among tour operators have changed in recent years because of the different strategy of adaptation to political conditions and economic circumstances. Until 1992, German people bought package tour products mainly from large German tour operators. As sales of their products decreased, some medium-sized tour operators increased their sales (Tab. 5). These operators call themselves Turkey

Tab. 5 Number of persons who bought package tour products for Turkey by tour operators in Germany

Name of operators	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95
TUI	98,200	81,210	146,700	134,400	91,600	152,600
NUR	68,521	57,062	109,473	95,962	65,561	125,000
ITS	27,100	22,080	42,095	37,334	27,240	39,486
ALLTOURS		2,530	15,370	18,400	11,000	39,000
JAHN	20,693	16,741	29,012	30,061	22,088	30,446
TJAERBORG	15,162	6,854	12,716	14,342	6,687	19,350
KREUTZER	27,258	18,300	24,760	21,636	11,930	16,600
AIRMARIN	4,259	3,392	11,466	11,768	6,005	11,358
HETZEL	14,736	8,167	19,237	17,260	8,605	11,834
TRANSAIR	7,436	5,700	14,899	16,019	13,056	20,935
STUDIOSUS	5,929	2,158	3,451	2,976	1,088	1,534
BFR	2,068	2,945	5,223	4,901	2,940	3,881
CLUB MED	9,584	3,286	5,322	2,390	1,582	2,387
JET	13,704	4,400	4,774	3,479	4,710	
ÖGER*	84,700	127,195	162,789	277,083	385,500	595,170
NAZAR*			38,000	43,768	117,284	221,207
ATT*	44,119	67,646	83,187	75,779	75,970	
Total	443,469	429,666	728,474	807,474	848,846	1,290,788
% of Turkey Specialists	29.05%	45.35%	38.98%	49.11%	68.18%	63.25%

Source: Nizamettin Şen (1995): Hans Amce'da Neler Oluyor? In: Türkiye Seyahat Acentaları Birliği Turizm Dergisi (Association of Turkey Travel Agencies Monthly Review), No.137, pp.16-17.
TÜRSAB Türkiye Seyahat Acentaları Birliği Turizm Dergisi, No.147, 1996, pp.44-45.

Notes: The number of tourists at NUR in 1994/95 stems from "Reisebüro Nachrichten", Nr.1, 1996, S.5. The number of tourists at Öger in 1994/95 includes the number of tourists at ATT.

Asterisk means a tour operator (Turkey specialist) whose president stems from Turkey.
ATT has become a subsidiary of Öger since March 1994.

specialists. The biggest specialist for the package tour to Turkey, Öger, had already surpassed TUI in the number of persons treated in 1990/91. But this company and the second largest Turkey specialist, Nazar, have increased the amount of sales rapidly since 1992/93 and 1993/94 respectively. More than 60 per cent of German tourists purchase package holidays from the Turkey specialists today. The owners and managers of these tour operators stem from Turkey.

It is also problematic for Turkey, if it can maintain its environmental quality for the local residents and tourists along the Aegean and Mediterranean coasts. As stated above, a lot of hotels have been constructed especially in the Mediterranean region. There are a considerable number of places where the coast has been concreted with accommodation facilities. Construction of second houses for Turkish people may well be more dangerous to the maintenance of the environmental quality, because the construction of these cannot be controlled and their number surpasses by far the bed capacity of hotels given license by the Ministry of Tourism. One can see such examples in Marmaris, Bodrum, Alanya and their neighboring areas. Rare species, such as a turtle, *Caretta caretta*, would have been exposed to the risk of extinction in Dalayan Bay, if development for tourism had been implemented according to the original plan. There are of course serious problems of sewage and garbage disposal as well. Water supply may be polluted with the waste, if those disposal problems cannot be resolved. The Turkish government is afraid that the country may repeat the same mistake that

has happened, for example, on the Costa Brava in Spain, the northern coastal region of Crete and the Ligurian coast in Italy. (*Die Zeit*, 26. Juni 1992)

The Turkish government has been aware of these problems since the end of the 1980s. The Ministry of Tourism states the principles of tourism policy as follows:

1. To create an efficient tourism sector with a high international competitiveness;
2. To meet the needs of foreign and domestic tourists and the resident population, to develop social tourism facilities, and to extend the economic benefits of tourism to the people; and
3. To ensure the continuity of natural and cultural assets.

Under these main principles:

... With the awareness that the natural and cultural assets of the environment are the creative source of tourism, the priority is to protect these assets and to ensure their continuity. The concept of MODERN TOURISM, where the success is measured not just by tourism income, but by environment-conscious approaches such as sustainable tourism and soft tourism, is adopted; and many environmental projects are conducted under this concept (such as the ATAK, the Blue Flag Campaign, the Anti-Mosquito Project, the Project for Monitoring our Coasts from the Air against Pollution Originating from the Sea, etc.) (Ministry of Tourism, 1995c, pp.5-6)

Among the projects mentioned above, the ATAK project is most noticeable. The Ministry of Tourism launched this project in 1989 to protect environment, by developing infrastructural systems of drinking water, sewerage, waste-water treatment and solid waste-disposal facilities in the region along the Aegean and Mediterranean coasts from the Edremit Basin to the Antalya Basin. The ministry has done pre-feasibility studies and feasibility studies in order to get financial support from the World Bank. These studies could be conducted with financial aid from the Japanese government through the World Bank. It has, however, not successful in getting financial support for the construction of the infrastructural systems from the World Bank as of summer 1996, although the feasibility studies were already finished in 1992. Nevertheless, the South Antalya region around Kemer has been successful in providing infrastructure for environmental protection. The quality of the sea at Kemer and its neighboring communities is excellent.

5. Conclusion and prospects of further researches

As described above, the policy of the Turkish government has been decisive in promoting international tourism in this country. It has provided infrastructure for international tourism, given incentives for establishing private enterprises in this sector, provided training courses for manpower, and energetically conducted marketing activity by itself. It also supervises private enterprises in this sector. Without the support of the government, it would have been impossible for the Turkish tourism industry to grow so rapidly.

It was German operators that first played an important role in the development of international tourism for that country, as well as the Turkish government. But as competition has become harder and harder, and as the crisis occurred through the political conditions, tour operators which were established by Turks living in Germany have taken the place of the large German tour operators. It is said that

international tourism is a passport to peace. But in reality peace is a pre-condition for international tourism, and the industrial structure of tourism can be changed through political conflicts.

There remain several problems to be clarified. The industrial structure of international tourism is not sufficiently discussed in this paper. It is not yet clear what kind of interrelationship there has been between international tourism and domestic tourism for Turkish citizens¹³⁾. Furthermore it has to be elucidated how the Turkish people settled in West European countries are involved in international tourism in Turkey.

Many say that ecological problems occur through the construction of second houses for Turkish people rather than international tourism itself. One may well think that a large number of Turks living in West European countries buy second homes along the Aegean and Mediterranean coasts. They temporarily come back to Turkey to enjoy vacations in their home country. But neither the Ministry of Tourism nor tour operators seem to have any interest in their behavior. It should be established whether the behavior of Turks living in West European countries has any relationship with the ecological problems in the tourist areas. Of course, the behavior of developers may well be more problematic for the ecology in tourism areas than the behavior of Turks living in West European countries.

It is also open to question whether cultural exchange can be advanced through the development of international mass tourism. Foreigners who come to Turkey on package holidays organized by tour operators seem to shut themselves in hotels, holiday villages, and so on. This tendency has been strengthened by the management policy of tour operators. There are large souvenir shops along the main highway away from the city centers and near sight-seeing spots such as ancient monuments. Tourists enjoying their vacations on the beach are brought in groups by buses to such souvenir shops. There are few chances for such foreign tourists to encounter the real everyday life of Turks.

From the geographical viewpoint, it is also necessary to inquire how the development of international tourism has influenced regional and urban development in Turkey. This theme is partly dealt with by Mizuuchi (1996).

Acknowledgment: This paper is one of results of the research conducted in 1995 and 1996 in Turkey and Germany through the support of the Ministry of Education, Science, Sports and Culture (Monbusho) in Japan, Grant-in-Aid for International Scientific Field Research, No. 07041063. This research project was organized and represented by Prof. Dr. Itsuki NAKABAYASHI, Center for Urban Studies, Tokyo Metropolitan University. The author greatly owes a debt of gratitude to a number of Turks whom he interviewed and to the researchers who participated in this research project.

Notes

- 1) There are some differences in the statistics on the number of foreign tourists arriving in Turkey according to different sources, although the difference is not big. The present author has shown in Fig. 1 the statistical data obtained through Internet from the Ministry of Foreign Affairs of the Republic of Turkey and from the Ministry of Tourism of the Republic of Turkey. The overall tendency in the both sources is similar. But there is a difference not to be disregarded. According to the former source, the number

- of foreign tourists increased in 1986 in comparison with 1985, while according to the latter it decreased. The author does not know the reason for the difference.
- 2) The number of Turks traveling abroad was fewer than 200,000 until 1968, while the number of foreigners arriving in Turkey had already exceeded 200,000 in 1964 (Ministry of Tourism, 1995b, p.89).
 - 3) Clothes are the most important Turkey's export. They accounted for about 3,775 million US dollars in 1991. Vegetables and fruits are second most important, amounting to about 1,749 million US dollars. The third is thread, and the fourth is iron and steel. The former amounted to about 1,429 million US dollars and the latter to about 1,309 million US dollars. There were no other export goods which amounted to more than 600 million US dollars in that year (Statistisches Bundesamt, 1994, S. 88-89). Germany is the most important trade partner for this country, followed by the USA and Italy. The amount of exports to Germany is much larger than to the other countries. It was about 3,413 million US dollars, while there was no other country to which Turkey exported more than 1,000 million US dollars in 1991 (Statistisches Bundesamt, 1994, S. 91).
 - 4) Bütow and Albrecht (1994, S.181-182) also find that the Turkish government has played an important role in the development of international tourism. They do not, however, explain this in detail.
 - 5) It was in 1963 that Josef Neckermann, the most eminent pioneer of tourism industry in Germany, began the business as a tour operator (Scherer, 1995, S.15). And the various laws for vacation in the Federal Länder of Germany, which differed from each other, were repealed and the Federal law of vacation came into effect in 1963.
 - 6) TÜRSAB is the Association of Turkish Travel Agencies.
 - 7) According to the representative of the Association of Travel Guides in Antalya, it cost DM 4,700,- in 1994, if one participated in a study tour of 16 days, while a normal tour of 12 days cost only DM 2,000,-. He said that participants in study tours are usually intelligent and rich.
 - 8) TUI means Touristik Union International GmbH & Co. KG and is the largest tour operator in Germany.
 - 9) Turgut Özal was nominated deputy premier and state minister in charge of Turkey's economic affairs under this regime. Although he resigned from his post in June 1982, he became prime minister in December 1983 on the basis of the result of the parliamentary election in November 1983. He led his cabinet until November 1989 and then became president of the Republic of Turkey (Çevik, 1993, p.107, pp.120-122). He adopted a policy of export-orientated industrialization instead of the policy of import substitution practiced in the previous period (Adanir, 1995, S.110).
 - 10) The Tourism Bank was established in 1960 by the government and reorganized into the Turkish Development Bank in the 1990s.
 - 11) NUR means "Neckermann und Reisen" and is the second largest tour operator in Germany.
 - 12) The Association of Hoteliers is called AKTOB. This association was founded in 1984. The number of members was 20 in this year, but this has now risen to about 140. The number of members increased especially in 1989 and 1990. One of the important tasks of the association is promotion and marketing of tourism in the Mediterranean region of Turkey. It was in 1986 that this association participated in the International Tourism Fair in Berlin for the first time (according to interview with the president of AKTOB in August 1996).
 - 13) German geographers have dealt with this theme. According to them, it was not customary for Turkish people to stay on the beach in summer. They used to live temporarily on the uplands in summer in order to avoid summer heat in the lowlands. Europeans

brought the habit of staying on the beach in summer to Turkey. First of all, rich urban residents in Istanbul and Ankara accepted the European habit in Turkey, and it gradually diffused all over the country (Hütteroth, 1982, S.442-444; Höhfeld, 1995, S.187-188). These authors do not, however, deal with the interaction between Turkish citizens and foreigners in the sphere of tourism in recent years.

References

- Adanir, Fikret (1995): *Geschichte der Republik Türkei*, B.I.-Taschenbuchverlag, Mannheim Leipzig, Wien, Zürich.
- Association of Turkish Travel Agencies (1994): *Travel Agencies in Turkey*, Istanbul.
- Bild* (3. Aug. 1991): "10 deutsche Urlauber entführt. Vier Kinder dabei".
- Bild* (2. April 1993): "Türkeireisen storniert".
- Bütow, Martin and Gertrud Albrecht (1994): Von Troja bis Terror: Tourismus in der Türkei, in: *Mecklenburg-Vorpommern: Tourismus auf dem Weg*, Greifswalder Beiträge zur Rekreatiionsgeographie/Freizeit- und Tourismusforschung, Bd.5, Förderkreis Freizeit- und Tourismusforschung e.V. Greifswald, S.179-191.
- Çevik, Ilnur (1982): *Turkey 1982 Almanac. A Turkish Daily News Publication*, Ankara.
- Çevik, Ilnur (1986): *Turkey 1986 Almanac. A Turkish Daily News Publication*, Ankara.
- Çevik, Ilnur (1993): *Turkey 1991-1992 Almanac. A Turkish Daily News Publication*, Ankara.
- Davidson, Rob (1993): *Tourism*, Pitman Publishing, London, second edition.
- Frankfurter Rundschau* (15. Oktober 1994): "Urlaub in der Karibik ist kaum teuer. Die türkische Tourismus-Motor gerät ins Schottern".
- van Harsseel, Jan (1994): *Tourism. An Exploration*, Prentice-Hall, Englewood Cliffs, third edition.
- Hamburger Abendblatt* (11. Juni 1994): "Preisrutsch bis zu 40 Prozent".
- Höhfeld, Volker (1995): *Türkei. Schwellenland der Gegensätze*, Justus Perthes Verlag, Gotha.
- Hütteroth, Wolf-Dieter (1982): *Türkei*, Wissenschaftliche Buchgesellschaft, Darmstadt.
- Kitagawa, Fumi (1996): Kanko no Tanjo (Birth of tourism), in: S. Yamashita (ed.) *Kanko Jinrui-gaku (Anthropology of Tourism)*, Shin'yo-sha, Tokyo, pp.14-23, (in Japanese).
- Martin, Philip L. (1991): *The unfinished Story: Turkish Labour Migration to Western Europe with special reference to the Federal Republic of Germany*, International Labour Office, Geneva.
- Ministry of Tourism (1995a): Promoting Turkish Tourism, in: *Executive's Handbook Turkey Almanac 1996*, pp.82-83.
- Ministry of Tourism (1995b): *Bulletin of Tourism Statistics 1994*.
- Ministry of Tourism (1995c): *Tourism Investment Opportunities and Procedures in Turkey*, Ankara (General Directorate of Investments. Department for the Guidance of Investments).
- Mizuuchi, Toshio (1996): Urban development and urban policy of Antalya, Turkey, in relation with the development of international tourism, in: *Jinbun Kenkyuu (Bulletin of Faculty of Letters, Osaka City University)*, Vol.48, No.5, pp.1-31, (in Japanese).
- Nakabayashi, Itsuki (ed.) (1996): *Japanese Invent Turkey. Tour, Perception, and Media. An Interim Report*. Center for Urban Studies, Tokyo Metropolitan University.
- Rauh, Günter (1979): *Beobachtungen zum innertürkischen Fremdenverkehr in der Provinz Antalya*, Nürnberger Wirtschafts- und Sozialgeographische Arbeiten, Bd.30, Selbstverlag des Wirtschafts- und Sozialgeographischen Instituts der Friedrich-Alexander-Universität, Nürnberg.
- Ritter, Gert (1977): *Der Tourismus in der Türkei. Wirtschaftliche Bedeutung, langbedingte*

- Strukturmerkmale, regionale Verteilungsmuster und Entwicklungsaussichten, in: *Zeitschrift für Wirtschaftsgeographie*, Jg.21, S.33-43.
- Scherer, Brigitte (1995): *Tourismus*, Rowohlt Taschenbuch Verlag, Reinbek bei Hamburg.
- Shaw, Gareth & Allan M. Williams (1994): *Critical Issues in Tourism. A Geographical Perspective*, Blackwell, Oxford.
- State Planning Organization, Republic of Turkey (1971): *Tourism in Turkey. Belek Feasibility Study. Economic Survey*.
- Statistisches Bundesamt der BRD (1989): *Länderbericht Türkei 1989*, Metzler Poeschel, Stuttgart.
- Statistisches Bundesamt der BRD (1994): *Länderbericht Türkei 1994*, Metzler Poeschel, Stuttgart.
- Süddeutsche Zeitung* (5. März 1993): "Türkische Luftwaffe bombardiert Kurdengebiete".
- Süddeutsche Zeitung* (6./7. März 1993): "Ankara versichert: Touristen in der Türkei nicht gefährdet".
- Süddeutsche Zeitung* (8. März 1993): "In der Region um den Berg Ararat. Türken bombardieren Kurden".
- Süddeutsche Zeitung* (11. März 1993): "Im Kampf gegen Kurden. Weitere Ausnahmerecht in Anatolien. Türkische Sicherheitskräfte verstärken ihre Operationen".
- Süddeutsche Zeitung* (15. März 1993): "Kurden angeblich zu Verhandlungen bereit".
- Süddeutsche Zeitung* (16. März 1993): "Türken lehnt Verhandlungen mit Kurden-Rebellen ab".
- Süddeutsche Zeitung* (17. März 1993): "Serie von Anschlägen in türkischen Städten".
- Süddeutsche Zeitung* (20./21. März 1993): "Ankara ruft Kurden zur Kapitulation auf".
- Süddeutsche Zeitung* (22. März 1993): "Newroz-Fest der Kurden".
- Süddeutsche Zeitung* (27./28. März 1993): "Razzia gegen mutmaßliche PKK-Rebellen".
- Süddeutsche Zeitung* (1. April 1993): "Blutige Zusammenstöße im türkischen Kurdengebiet".
- Süddeutsche Zeitung* (29. Juni 1993a): "Attentat im türkischen Seebad Antalya vermutlich Werk der PKK. 26 Verletzte bei Bombenanschlag. Neun Bundesbürger unter den Opfern".
- Süddeutsche Zeitung* (29. Juni 1993b): "Türkei-Reiseveranstalter bieten Umbuchungen an".
- Süddeutsche Zeitung* (3. Mai 1994): "Türkei: Anziehendes und Abschreckendes. Ökologische Bemühungen um Erhaltung des Tourismus, politische Entwicklungen dagegen".
- Süddeutsche Zeitung* (17. Jan. 1996): "Sie leben vom Tourismus".
- Der Tagesspiegel* (8. Oktober 1994): "Zu weit weg, zuwenig Komfort. Türkei-Tourismus leidet auch unter Strukturproblemen".
- Vorlaufer, Karl (1990): Dritte-Welt-Tourismus. Vehikel der Entwicklung oder Weg in die Unterentwicklung, in: *Geographische Rundschau*, Bd.42, S.4-13.
- Die Welt* (25. Feb. 1993): "Terror-Drohung gegen Touristen. Kurdische Arbeiterpartei will türkische Reiseziele überfallen".
- Die Welt* (30. Juni 1993): "Angust vor Anschlägen – Deutsche meiden die Türkei".
- Die Welt* (19. Juli 1993): "Wieder Bomben-Anschläge in türkischem Badeort".
- Die Welt* (10. Juni 1994): "Hoffnungsträger Gastfreundschaft. Die Türkei ist ein ideales Reiseland. Günstige Preise und fast menschenleere Strände".
- Welt am Sonntag* (22. Mai 1994), S.25.
- Die Zeit* (26. Juni 1992): "Güllük aber ist überall".