

DEVELOPING ALTERNATIVE MODES OF TOURISM
IN TURKEY

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ABSTRACT

DEVELOPING ALTERNATIVE MODES OF TOURISM IN TURKEY

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Mass tourism being on the agenda of world tourism industry since post war period, has been facing stagnation with late 80's. Additionally consumer's preferences and tendencies towards seeking new activities regardless of sea-sun-sand type of tourism have been started to change. Therefore popular tourist destinations are in a position where to develop alternative tourist activities to sustain their market shares in world tourism market.

In compliance with this trend, the purpose of this thesis is to analyze the need and the reason of Turkish Tourism Industry moving away from concentrating merely on mass tourism and accordingly to evaluate the efforts of Turkish tourism authorities in diversifying tourism activities and extending the tourist season to year round with reference to Tourism Development Regions, Amendment of Tourism Encouragement Law, etc. Additionally the importance of focusing on cultural, historical, traditional identity and unique assets of Turkey in order to sustain its ranking in the international tourism market is stressed.

Keywords: Alternative Tourism, Diversification of Tourism activities, Prolongation of tourist season.

ÖZ

TÜRKİYEDE ALTERNATİF TURİZM TÜRLERİNİN GELİŞTİRİLMESİ

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Dünya turizm endüstrisinin savaş sonrası dönemden beri gündeminde bulunan kitle turizmi, 80'lerin sonuyla birlikte durgunluk dönemine girmiştir. Bununla birlikte tüketici tercihlerinde ve eğilimlerinde deniz-kum-güneşi göz ardı etmeye ve yeni aktiviteleri aramaya yönelik değişimler oluşmuştur. Bu sebeple popüler turizm odakları dünya turizm pazarındaki paylarını koruyabilmek için alternatif turizm aktiviteleri geliştirme noktasına gelmişlerdir.

Bu eğilim kapsamında bu tezin amacı, Türk turizm endüstrisinin sadece kitle turizmi üzerine yoğunlaşmasının yanında; turizmin çeşitlendirilmesi ve turizm sezonunun tüm yıla yayılması çabalarına olan ihtiyacının analiz edilmesi ve bu çalışmaların nedeninin Turizm Kentleri ile 4957/2634 sayılı Turizmi Teşvik Kanunu kapsamında değerlendirilmesidir. Ayrıca Türkiye'nin uluslararası turizm pazarındaki konumunu koruyabilmesi için, kültürel, tarihi ve geleneksel kimliğinin ve kendine özgü değerlerinin üzerinde durulmasının önemi vurgulanmaktadır.

Anahtar Kelimeler: alternatif turizm, turizm faaliyetlerinin çeşitlendirilmesi, turizm sezonunun uzatılması.

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CHAPTER I

INTRODUCTION

It is widely accepted that tourism is gaining more and more importance with the end of 20th century and especially with the beginning of 21st century regarding to the changing trends. Although it is difficult to make a universally accepted definition, World Tourism Organization has taken the concept of tourism beyond holiday-making and officially defined it as follows:

Tourism comprises the activities carried out by people during their holidays and their visit to places different from their usual environment or residence, for a consecutive period of time less than a year, with leisure, business or other purposes (McIntosh, Goeldner and Ritchie 1995: 11).

'Usual environment' in this definition, refers to the movements excluding the routine trips within the daily-used area and frequent regular trips between home and workplace.

Additionally the use of World Tourism Organization's broad definition makes it possible to describe tourism between countries as well as tourism within a country. Accordingly "Tourism refers to all activities of visitors including both overnight visitors and same day visitors" (Lickorish and Jenkins, 1997: 36).

On the other hand tourists are defined as

... the people who are visiting a particular place for sightseeing, visiting their friends and relatives, taking a vacation, and having a good time. [Therefore] tourism may also be defined as the sum of relationships arising from the interaction of tourists, business suppliers, host government, and host communities in the process of

attracting and hosting these tourist and other visitors (McIntosh, Goeldner and Ritchie 1995: 9-10).

With reference to tourist travels, forms of tourism can be grouped as follows (Lickorish and Jenkins, 1997):

- Domestic tourism: This sort of tourism involves the visits by residents of a country to their own country,
- Inbound tourism: This is the sum of visits to a country by non-residents, and
- Outbound tourism: Such an activity contains the visits by residents of a country to another country.

Such groups can be categorized as (McIntosh, Goeldner and Ritchie 1995):

- Internal tourism: comprises domestic and inbound tourism,
- National tourism: comprises domestic and outbound tourism, and
- International tourism: includes inbound and outbound tourism activities.

All definitions stated above indicate that, tourism is a broad concept referring to the people's activities of leisure time within or out of their countries regardless of routine travels i.e. from home to work place, to their daily used areas etc.

Meanwhile, tourism is a multidimensional sector and is made up of several different industries. Accordingly, it has many interactions with other service sectors. It is an activity, which affects societies in different ways and has certain impacts on socio-economic and cultural development of them. It may contribute to the development of many fields. Therefore the number of such fields takes part in tourism movement and any change at these participating sectors, subsequently effect tourism development (Tarhan,

1997). As well as accommodation facilities, the fields that tourism can contribute are stated as follows (McIntosh, Goeldner and Ritchie 1995):

- Regional development
- Employment,
- Travel industry,
- Entertainment activities,
- Culture and other hospitality services,
- Environmental protection,
- Infrastructure,
- Transportation,
- Health,
- Education, etc.

Regarding this, it can be considered that tourism industry and regional development are closely linked, as tourism industry being a service sector contributes to the economic development and job creation. Tourism is a major job generator, including alternative employment opportunities for women, young people, highly qualified and unskilled people that provide the fostering of regional development (World Tourism Organization, Overview 2002).

Tourism sector also has a share in preserving the cultural assets by enhancing them within the surrounding environment, which might otherwise be allowed to deteriorate or disappear. In addition to that, public revenues generated from tourism industry can be counted and such revenues can support the cultural and historical heritage (Lickorish and Jenkins, 1997). On the other hand, unless the carrying capacity and the vulnerability of those cultural assets are count in a sustainable manner, the inevitable outcome will be the complete loss of historical heritage.

Tourism industry may also encourage protection of environment through control of air, water and noise pollution, littering and other environmental problems. On the contrary parallel to tourism development if environmentally sound policies are not developed, the scene will be reversed and tourism appears to be one of the major sectors that deteriorate the natural resources, by bringing overcrowding, congestion, uncontrolled constructions etc.

Tourism can stimulate the development of local infrastructure i.e. roads, water, sewage and sanitary systems, telecommunications etc. providing economic benefits as well as healthy environment.

Tourism may also help the education of especially young generations with regular training programs, work shops etc (World Tourism Organization, 2002), which will in turn provide future generations, conscious about tourism.

Under the light of these features, it is obvious that tourism policies should be based on actual facts and possibilities of the country. Objectives, ways and means have to be rational, realistic, and depended on accurate facts of the country (Tarhan, 1997). Otherwise, over expectations and excessive targets cause the waste of resources, while under expectations cause loss of potential benefits. Realistic and rational policies should be set in a sustainable manner to secure optimal benefits from tourism sector. Addition to that tourism sector should have an organized structure to implement those policies related to above mentioned sub-sectors, to prepare the relevant facts and information, to make evaluations and similar works. Such an organized manner will lead the execution of the decisions from the beginning of preparation until the end of implementations.

Social and economic benefits of tourism sector make it one of the major service industries in the world. Also global forecasts show that tourism sector will continue to grow and contribute to economic development in coming years, as it is reported that tourism has stimulated significantly the domestic economic growth of many OECD countries like Spain, Turkey etc., at the same time has emerged among the major factors for regional development in The United States, France, Ireland, Greece, etc. (Cabrini, 2003).

Such an important sector has also certain impacts in Turkey's agenda, likewise in the world. The contribution of tourism to Turkish economy is a determinant factor in its progress, as total number of tourist arrivals in 2003 was 14 million and tourism revenues were 13 billion USD. It also contributes directly to employment as it activates other sectors, fastens socio-economic and cultural development. Moreover it plays an important role in the improvement of infrastructure etc. Therefore it is accepted as one of the major options in the development model.

When the historical background of tourism in Turkey is examined, it is seen that the development of tourism sector has merely depended on mass tourism and tourism plans has been prepared to promote coastal activities, namely sea-sand-sun (3S) type of activities. Moreover although Turkey has high tourism potential, she had not developed alternative modes of tourism mainly depending on natural, cultural and traditional assets of the country. Finally the outcome of all these figures is reflected as 3.2 % in international tourism arrivals and 3.7 % in tourism receipts in world tourism market (World Tourism Organization, 2002), whereas top three of Mediterranean Region are France, Spain and Italy having percentages of 19.3, 12.9 and 10 in international tourist arrivals and 13.4, 14, 11.2 in tourism receipts respectively. (World Tourism Organization, 2002) These ratios are the outcomes of being trademark in coastal tourism for many years.

In other words the fact is that, although Turkey has relatively higher potential in tourism in comparison to many other popular tourist destinations, the return of this sector is quite low, with respect to Mediterranean Region facing extremely high ratios. Additionally Turkey desires to promote her potential in the international tourism market and accordingly to obtain more tourism revenues. Therefore main question to be asked is that what should be done for the further development of tourism in Turkey and for the competition of her with rival Mediterranean countries.

Regarding to the main questions, the basic hypothesis that will direct this study is that mass tourism, which has been on the agenda of very many tourist destinations for a long time, has been facing certain difficulties and loosing its high market shares. Therefore whether Turkey continues to serve for mass tourism, she can neither develop and rise in the world tourism market, nor compete with Mediterranean countries, but stays as it is, as most of the Mediterranean tourist destinations have been serving for mass tourism for many years and have been holding the larger percentages (in tourism revenues and in tourism receipts) in the international tourism market. This eventually causes high competition among countries in sea-sun-sand market and also the risk of losing market shares due to changing demands.

Second hypothesis is that Turkey has to develop and promote alternative tourism activities regarding contemporary trends in World's tourism and consumer preferences, which will contribute to Turkey in international tourist arrivals and tourism receipts. Additionally development of alternative tourism will be advantageous for Turkey within Mediterranean Region. But this does not mean the complete decline of sea-sun-and based activities and rise of alternative tourism as the rival activities, but it is the rise of

tourism diversification with the support of current potential in coastal tourism. Regarding these, alternative tourism types have to be defined in the light of World Tourism Organization's indications and current demands, and potential areas for such kind of development have to be determined accordingly.

With reference to all above, in this master thesis as a first step, historical background of mass tourism is tried to be analyzed to understand the international tourism market and popularity of certain tourism destinations. As the mass tourism is accepted to originate mostly in Europe and indeed Turkey is having high competition with Mediterranean Region of Europe, the attitude is to search the progress and the stagnation of mass tourism in Europe with its basic features.

After setting the problems of mass tourism, future trends and tendencies towards tourism destinations are searched through World Tourism Organization's prospects. Referring to that, the concept of alternative tourism is tried to be explored in order to set the relation between new trends and the alternative modes of tourism with reference to certain Mediterranean countries. The following step is to describe the place of Turkey in the international tourism market by analyzing the development of tourism policies in Turkey through certain time intervals. After all the main objective is to set the need and the reasons of Turkey to evaluate what has been done up to now and followed by what else to do for the hard rivalry within Mediterranean Region.

Under the light of these, the formulation of the chapters is as follows:

- The first step is to explain various definitions of tourism and accordingly the tourism types. The following phase is to answer the

question of why to develop tourism in Turkey by stressing the importance and impacts of tourism.

- In the second chapter, tourism sector in Europe is evaluated with reference to the rise of mass tourism from 50's to the present time. This is followed by the stagnation of mass tourism including the problems that mass tourism faced. Thirdly the prospects for the international tourism are presented containing the 2020 Vision of World Tourism Organization and long-term forecast and assessment of the development of tourism up to the first twenty years of new millennium.
- The third chapter, Alternative Tourism and Europe presents the rise of alternative tourism, the comparison between mass tourism and alternative tourism and defines the alternative tourist activities. Also with this chapter, four Mediterranean tourist destinations (Spain, Greece, Slovenia and Croatia) are analyzed regarding their tourism development model.
- In the fourth chapter, Evolution of Tourism sector in Turkey, the development of Turkish Tourism policies are presented while mentioning Turkey's tourism activities and potentials through historical analysis. The first period is the initiation of tourism activities between the years of 1923 and 1950. The second period is the initial developments in tourism sector within the years of 1950-1980. The third period is the organized developments in tourism sector between the years of 1980-2001.
- The fifth chapter, New Era in Tourism describes the change in the tourism vision of Turkey regarding the Eight Five Year Development

Plan, Second High National Council on Tourism and the Urgent Action Plan of the Government. The amendment of Tourism Encouragement Law (No: 2634) by Law numbered 4957/2634 and enactment of the regulations related to this law are also be evaluated and under the light of these developments the following step is to define Tourism Development Regions as the case studies of establishing alternative modes of tourism development (Aydın Didim Tourism Development Region, Muğla Dalaman Tourism Development Region, Northern Antalya (Kepez-Varsak- Topallı) Tourism Development Region and Antalya Manavgat Oymapınar Tourism Development Region) and to explain the potentials, selected modes and the expectations.

- In the conclusion chapter, there is brief summary of whole study and hypotheses determined in the introduction chapter are evaluated within this framework. Additionally final remarks are given regarding to the 2020 vision of World Tourism Organization.

Two methodological approaches are adopted in this thesis. The first one is the interpretative-textual method used in chapters III, while stating the tourism policies of selected countries and in chapter V while mentioning about the New Era in Turkish Tourism. The second one is the historical analysis used in chapters II to clarify the development of mass tourism and in chapter IV to examine the historical background of tourism policies in Turkey. Accordingly the pre-determined hypotheses are verified.

In this thesis references benefited from are generally published materials and the documents that are available on internet. Additionally the statistical data used are generally taken from World Tourism Organization and Turkish Ministry of Culture and Tourism.

CHAPTER II

TOURISM IN EUROPE

2.1. RISE OF MASS TOURISM

Likewise in the world, tourism industry in Europe had its major growth within 1950s. Before that time due to the wartime regulations, there were travel restrictions and obstructions concerning health and safety. Therefore tourism sector was negatively affected and stayed as a fragmented sector, and basic components like hotels, transport operators, travel agencies, tour operators etc. worked independently.

1950s was the growth of tour operators, which changed the nature of tourism industry from individual business activities to more integrated activity (Lickorish and Jenkins 1997).

1950s was the time when the international travel for holiday purposes started to be strengthened. This change in the nature of demand was considered among the factors that changed the structure of tourism industry (Lickorish and Jenkins, 1997). Most of the West European countries started to increase their interventions in international tourism and began to promote their tourism industries aiming to increase their share of benefits from it (Tarhan, 1997). This fact was referred to the development of mass tourism, which has started with the postwar period and reached until the present time. Indeed the rise of industrial societies in the Northern and Northeastern parts of Europe has been among the major effects on the progress of mass tourism. Such industrially developed societies made

available wealth and leisure, which are the preconditions of mass tourism.

This process is followed by:

- The rise in real incomes, especially the rise in the disposable income that can be allocated for travel,
- The increase in wealth,
- Change in lifestyles, behaviors,
- The rise of paid holidays and longer periods of leave from work,
- Increasing demand for international holidays

which were the major factors leading the growth of mass tourism (Pearce, Benckendorff and Johnstone, 2001), (Küce, 2001).

Initial developments in mass tourism have changed the structure of tourist market, and accordingly holiday and travel industry started to offer more integrated services. The product of such an integrated manner was the satisfactory package holidays coincided with the population movement of wealthy groups from cold northern industrial cities to warm sunny beaches. This has given a rise to the rapid development of most popular Mediterranean mass tourist destinations.

2.2. STAGNATION OF MASS TOURISM

Till the end of 1980's mass development was facing its best times, but after that period especially with the beginning of 90s such mass movements and the demand for 3S tourism began to show distinct signs of weaknesses (Lickorish and Jenkins, 1997).

The weakness that mass tourism market faced, had certain reasons one of which was the stuck of mass market destinations into high-rise buildings

with lack of infrastructure, polluted air- water, destroyed natural resources, overuse of carrying capacity etc. Unplanned developments caused unrecoverable damages on Mediterranean coasts of popular tourist destinations due to the uncoordinated and unplanned tourist developments. On the other hand it has been recognized that tourism industry should preserve and protect the environment and natural attractions to ensure the continuity of tourist travels. Furthermore awareness of quality and sensitivity to environmental satisfaction has risen (McIntosh, Goeldner and Ritchie, 1995) which lead the cause of interventions of the governments towards tourism activities aiming environmental protection, consumer protection and safety- well being of people. Actually this meant the change in priorities of government interventions as governments were giving up economic benefits in favor of environmental protection (Tarhan, 1997).

Popular tourist destinations serving for mass tourism were facing not only environmental problems but also there have been quality problems in accommodation facilities, food and beverage services etc. due to the high population movements, congestion and overcrowding in peak seasonal period (Lickorish and Jenkins, 1997). Unfortunately seasonality feature of tourism industry was unavoidable due to the mass tourism development.

One other reason was the changing tastes of the consumers.

Consumers generally have become increasingly dissatisfied with standardized mass produced goods and are demanding more varied and customized products that meet their individual needs for self-improvement and relief from the pressure and pollution of an over regimented urbanized environment. Similarly many of today's tourists are rejecting standard mass package tours. More and more are seeking holidays that cater to their desire for learning, nostalgia, heritage, make-believe action and a closer look to other (Boissevain, 1996: 3).

Regarding these changing tastes, consumers started to be in search for more varied products than traditional sun-sea-sand type of summer activities i.e. excursions to authentic and mystical places, traditional lifestyles of local communities, healthy and preserved natural environments etc.

Another issue within this concept was a move away from single long vacation to fragmented- shorter holidays due to greater work pressures (Küce, 2001). Although in the mass travel times, the length of stay per trip was much longer, recently length of stay per trips has continued to fall over years as people started to choose multiple short breaks rather than one longer holiday.

Therefore seasonality has started to lose its importance and active holidays depending on culture, nature, traditional way of life have become the objectives of new tourists. As a result mass markets have lost much of their traditional seaside holidays, but expectations for the high quality and diversification and also interest in environmental satisfaction have become new factors affecting the demand of consumers (Lickorish and Jenkins, 1997). The phenomenon of former mass products such sea-sand-sun is no longer sufficient to provide the long-term success. Additionally all these lead the rise of alternative tourist destinations and slow down the traditional tourist movements from north to south in Europe.

There are mainly two different attitudes towards the problems that mass market has been facing. The first attitude recognizes that this situation does not mean the complete loss of sea-sand-sun based activities. This is because mass tourism market from post war period until present time has nearly brought whole of tourist arrivals and tourist revenues. Therefore popular tourist destinations do not ignore mass tourism potential, instead has been creating tourist destinations according to changing consumers'

tastes and with an environmental perspective. Such new destinations are considered to include complementary activities and attractions to mass tourism, by allowing tourist the chance to enjoy the natural areas, unique assets and cultural history of the region (İktisadi Kalkınma Vakfı, 1991). On the other hand second attitude accepts that mass tourism has caused hazards on natural environment. Therefore certain tourist destinations are propelling rival tourist activities, which will replace mass tourist development, as mass tourism has been blamed for depleting natural resources, for generating relatively low revenues and for attracting low spending tourists (The Croatian Tourism Cluster, 2003).

2.3. PROSPECTS FOR INTERNATIONAL TOURISM

World Tourism Organization has evaluated the growth of tourism industry and has made the long-term forecast and assessment of the development of tourism up to the first twenty years of new millennium, which was named as Tourism 2020 Vision. Such vision includes long-term prospects regarding the international tourist arrivals.

According to World Tourism Organization's predictions, there will be approximately 1.5 billion international tourists in 2020. This figure is estimated through annual growth rates of 4.1% per year.

More specifically, the international arrivals in Europe will rise from 338.4 million tourists registered in 1995 to 717 million tourist in the year 2020, "keeping Europe at the top of the world destination ranking and the issuing markets ranking, according to the same sources" (Spanish Institute For Prospective Technological Studies, 2001:8)

TABLE: 1 INTERNATIONAL TOURIST ARRIVALS BY REGION

INTERNATIONAL TOURIST ARRIVALS BY REGION (MILLION)											
	Years			Forecasts		Average Annual Growth Rate (%)			Market Share		
	1995	1999	2000	2010	2020	1995-2000	1999-2000	1995-2020	1995	2010	2020
WORLD	565.4	650.4	698.8	1,006.4	1,561.1	4.3	7.4	4.1	100	100	100
AFRICA	20.1	26.5	27.6	47.0	77.3	6.5	4.2	5.5	3.6	4.67	5.0
AMERICAS	108.9	122.2	129.0	190.4	282.3	3.4	5.6	3.9	19.3	18.9	18.1
EAST AFRICA AND THE PACIFIC	81.4	97.6	111.9	195.2	397.2	6.6	14.7	6.5	14.4	19.4	25.4
EUROPE	338.4	380.2	403.3	527.3	717.0	3.6	6.1	3.0	59.8	52.4	45.9
MIDDLE EAST	12.4	18.2	20.6	35.9	68.5	10.7	13.2	7.1	2.2	3.57	4.4
SOUTH ASIA	4.2	5.8	6.4	10.6	18.8	8.8	10.3	6.2	0.7	1.05	1.2

Source: World Tourism Organization (WTO, 2002)

TABLE: 2 INTERNATIONAL TOURISM RECEIPTS

INTERNATIONAL TOURISM RECEIPTS (US\$ BILLION)					
	Years			Average Annual Growth Rate (%)	
	1995	1999	2000	1995-2000	1999-2000
WORLD	406.2	455.4	475.8	3.2	4.5
AFRICA	8.1	10.3	10.7	5.7	3.9
Americas	99.7	122.4	136.4	6.5	11.4
EAST AFRICA AND THE PACIFIC	74.5	75.2	82.5	2.1	9.7
EUROPE	212.8	233.1	231.5	1.7	-0.7
MIDDLE EAST	7.6	9.8	9.7	5.0	-1.0
SOUTH ASIA	3.5	4.6	5.1	7.8	10.9

Source: World Tourism Organization (WTO, 2002)

On the other hand, the analysis shows that while Europe will remain the world's largest tourist receiving region, it will lose some parts of its market shares. Europe continues to grow with the lowest percentage among other regions, in other words overall shares of arrivals to the European Region is expected to decrease within the period of 1995-2020. Europe's growth rate is foreseen to be 3% and the European tourism industry faces ever-increasing levels of destination competition from other destinations as the highest levels of growth are expected to be in Middle East, East Asia and The Pacific, and South Asia; which are 7.1%, 6.5% and 6.2% respectively.

The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and Americas (282 million), followed by Africa, the Middle East and South Asia. East Asia and the Pacific, South Asia, the Middle East and Africa are forecasted to record growth at rates of over 5 per cent per year, compared to the world average of 4.1 per cent. The more mature regions Europe and Americas are anticipated to show lower

than average growth rates. Europe will maintain the highest share of world arrivals, although there will be a decline from 60 per cent in 1995 to 46 percent in 2020 (WTO, 2002).

All these figures show that, great amount of tourists in the year 2020 will prefer Far East instead of Europe, although Europe seems to be in the first ranking position of international tourist arrivals table. This indicates that mass tourist destinations are not that much popular as they were before 1980s. Currently new destinations, which seek to develop a tourism attraction base, start to give priority to uniqueness. Replicating what exists in the market or in other destinations does not offer anything new to the tourist, but uniqueness entices people to visit. The forecasted changes in preferences of tourists lead the rise of East Asia and the Pacific, where major attractions are uniqueness and authenticity. "Authenticity reflects the sense of place and represents what currently exists; cultural, historical, natural resources form the foundation of establishing authenticity" (Gartner, 1996:358-360). Additionally uniqueness is related to authenticity as what is authentic about a community and its natural- socio-cultural base can be the key element for uniqueness

With reference to these change in consumers tastes, traditional sea-sand-sun destinations in Mediterranean Region are diversifying their tourism product to encourage the generation of new markets, spreading the demand away from more traditional areas such as cities and coastal regions and expanding the promotion of their historical and natural assets, which are generally located in the interior zones of coastal areas (WTO, 1999). They are giving importance to develop new activities in such inland areas i.e. rural tourism, culture tourism, winter tourism, health tourism, big event organization like habitat, Olympic games etc. with emphasizing environmental management in order to encourage sustainability. Activity based tourism becomes a growing sector among popular tourist

destinations, involving water sports, mountain, hiking, biking, golf, sports holidays, nature parks, etc.

The common objectives of offering varied destinations and activities are:

- Diversifying tourist activities
- Extending tourist season,
- Lengthening the stay periods of the tourists,
- Attracting more qualified and higher spending tourists,
- The optimum usage of infrastructure and carrying capacity,
- Preservation of natural environment,
- Contribution to the socio-economic development of newly emerged tourist destinations (Lawton and Weaver, 2001; WTO, 1999).

In the light of above mentioned objectives, the concept of alternative modes of tourism has stated to be popular and generally used to cover the hazardous side of mass tourist development and to offer more sustainable growth based on tourism.

CHAPTER III

ALTERNATIVE TOURISM AND EUROPE

3.1. ALTERNATIVE FORMS OF TOURISM

The concept of alternative forms of tourism covers all types of tourist activities that are called soft tourism, small-scale tourism, green tourism, nature tourism, integrated tourism etc. The birth of alternative tourism depends on the high criticism towards mass tourism due to the problems it has triggered. Thus alternative tourism has been offered as a hope for proving consistency with natural, social and community values. Major indication of alternative tourist activities is that “Alternative forms of tourism and tourist will have fewer and less severe negative effects on destination areas, environment and their populations without diminishing the positive economic effects” (Smith and Eadington, 1992: 32).

The basic reason behind the rapid growth of alternative tourism is the recognition of the potential for tourism development to produce adverse environmental and social impacts that undermine the long-term attractiveness of the destinations (Moscardo, 2001). In other words, the idea of preserving social, natural and historical assets of tourist destinations becomes principal objective.

All those lead the sustainable tourism as a goal for tourism development, which can be defined as “the tourism that meets the needs of the current generation without compromising the ability of the future generations to meet their own needs” (Weaver David, 2001: 300). The idea behind the sustainability is that, there can not be any tourism development regardless of nature, but on the contrary any tourism development should enhance the

natural riches and contribute to the propelling of socio-economic progress of the region. Therefore the increase of the awareness in environmental sensitivity, ecological consciousness and the combination of them with tourism activities caused the evaluation of mass tourism against alternative forms of tourism.

Referring to table 3, mass tourism is generally characterized by rapid development with the focus on economic revenues and less consideration to environmental and social impacts. Emphasis is on quick growth to generate currency flow rather than sustainable development. However, alternative tourism is defined as a relatively slow development regarding sustainable growth. It is more sensitive to especially economic and social needs of local people and accepts economic revenues stay in the local settlements for a long-term perspective with tourism development.

Additionally mass tourist activities merely depend on seasonal climatic conditions known as sea- sun- sand; therefore they are short-term activities, with creating high capacities during summer months. Tourists travel to popular mass tourism destinations and create high population movement, and congestion in such places. On the other hand alternative tourist activities can occur at any time of the year regardless of summer months therefore may create average capacities.

TABLE: 3 COMPARISON OF MASS TOURISM AND ALTERNATIVE TOURISM

COMPARISON OF MASS TOURISM AND ALTERNATIVE TOURISM		
	MASS TOURISM	ALTERNATIVE TOURISM
GENERAL FEATURES	Rapid Development	Slow Development
	Maximizes	optimizes
	Socially, environmentally inconsiderate, aggressive	Socially, environmentally considerate, cautions
	Short Term	Long Term
	Remote control	Local Control
	Unstable	Stable
	Price Consciousness	Value consciousness
	Quantitative	Qualitative
	Growth	Development
	Peak holiday periods, seasonal	Staggered holiday periods, no necessarily seasonal
	Capacity for high seasonal demand	Capacity for average seasonal demand
	Tourism development everywhere	Development only in suitable places
TOURIST BEHAVIOR	Large Groups	Singles, families, small groups
	Fixed program	Spontaneous Decisions
	Tourists directed	Tourist decide
	Comfortable and Passive	Demanding and active

Source: Gartner, 1996: 339-340

Mass tourism is recalled with large groups, fixed program, where tourists are directed by tour operators, travel agencies etc. The activities of the package tour were predetermined, i.e. where to accommodate, where to visit, when to visit, how long to stay in selected places etc. On the contrary alternative forms of tourism refer to the small groups, families even singles. The idea behind of them depends on quick decisions where all decisions are left to the tourists and consumers select what to do, where to go, how long to visit etc.

With reference to the table 3 it can be said that, large amount of tourists use the selected destination in summer months through all inclusive program with pre-determined activities, most of which happen within the boundaries of accommodation units. There is no chance to get familiar with natural environment and social structure of surrounding settlements.

The activities classified under alternative tourism are various, but may be divided into certain categories as follows (Spanish Institute For Prospective Technological Studies, 2001; Gartner, 1996; Aslanyürek, 1984):

- Cultural and historical tourism based on the unique identity of visited site
- Health Tourism depending on the resource and type of facility
- Conference- Congress Tourism depending on the type of activity, the aim of the meeting
- Sports tourism based on both excitement and the ability to perform the activity
- Contact With Nature: Eco- tourism activities based on preserved environment having natural riches
- Entertainment Tourism based on the availability of wide range activities depending on amusement.

3.1.1. Cultural and Historical Tourism: This type of tourism contains the activities developed within the aim of providing tourist some knowledge and enrichment of the cultural background of the visited site (Spanish Institute for Prospective Technological Studies, 2001).

Activities within this sort of tourism may be the discovery of a country, region, remains of built environment, historic sites, and even man-made structures; traditions, local features, exotic lives, cultures, and even local ecology i.e. plants, fossils, wildlife etc. (Lier and Taylor, 1993; Gartner, 1996). This discovery may be carried out by certain visits and tours to museums, monuments, ruins and also joining to festivals, special ceremonies peculiar to selected destination, examining the past and present way of traditional life and all interaction between host and the guest.

Cultural and historical tourism is regardless of seasonal activities, that is to say such areas are exposed to tourist attraction throughout the year, which makes this sort of tourism more popular and increase the total number of trips to such destinations.

3.1.2 Health Tourism: This is one of the most ancient types of tourism as the benefits of natural springs, water cures; spas and mud are well-known from earlier times until present time. To already existing mineral and medicinal hot water treatments, this sort of tourism has recently added seawater therapy, beauty treatment, fitness and anti-stress treatments to fight with the stress of daily life. Accordingly, advanced thermal resorts serving for a variety of treatment opportunities, now become much more popular (Lier and Taylor, 1993; Gartner, 1996; Lawton and Weaver, 2001).

3.1.3 Conference and Congress Tourism: Attendance at conferences, seminars, workshops and conventions can be listed as the activities within

this type of tourism. All those activities have been continuously growing according to the need for maintaining "... the membership by providing information, dissemination, sales and increasing product awareness services [of] trade associations, educational organizations and special interest groups" (Gartner, 1996: 318).

Although the congresses, convention and business activities are not strictly tourist activities, they are well related to tourism due to services needed i.e. accommodation, food- beverage services, shopping and commercial facilities etc.

3.1.4 Sports Tourism: It is a broad category depending on how sport activities are classified. Sports Tourism contains wide variety of sports activities from team sports like basketball- football to adrenalin and adventure sports like paragliding, mountaineering, climbing, white water diving, rafting etc and even to yachting. Although many of the classifications overlap with each other, general sub-categories may be defined as: adventure sports, recreation and out-door sport activities.

Adventure sports include risk factor, indeed may go beyond traditional risk sports i.e. winter sports, mountaineering, skiing etc. New varieties are appearing such as ballooning, abseiling, kayaking, parachuting, bungee jumping, rafting, windsurfing etc (Spanish Institute for Prospective Technological Studies, 2001).

Trekking and cycling may be considered among the recreational outdoor activities. Additionally golf, which is a very popular environment oriented sport, may be considered within recreational activities.

3.1.5. Contact with Nature: This refers to the active contact with the countryside, the landscape, flora, fauna, and protected areas i.e. natural

parks, wildlife preservation zones etc. Such active contact facilities may be maintained by periodic participation to farm life, horse-bike riding trips, joining to natural and organic food production, staying in the farm villages etc.

The activities stated above are also closely related to the concept of eco-tourism, where the major considerations are the local people's active participation to tourism activities and provide the host and the guest interaction, by this way raising the consciousness of local people and providing the return of revenues to local economy.

3.1.6. Entertainment Tourism: This sort of tourism refers to the facilities, which offer visitors a wide range of attractions and activities i.e. technology, fun, sports, science etc. in a relatively compact area. Theme parks are among the important entertainment tourism activities and may also be built in the traditional destinations as a means of differentiating the existing tourist destination from competitor ones.

3.2.MEDITERRANEAN TOURIST DESTINATIONS IN BEHALF OF ALTERNATIVE TOURISM

Southern Europe is one of the most popular international tourist destinations in the world with markedly different environment, suitable climatic conditions, natural resources and cultural assets i.e. artifacts than that of the Northern Europe from which a great number of tourists originate (Callaghan, Long and Robinson, 1994).

Northern Shores of Mediterranean Sea provide suitable leisure time activities for the people of Northern Europe who can escape from cooler industrial parts of North to convenient climate of south. Furthermore "as long as South Europeans are willing to cater for the ever- increasing

demands of these escaping Northerners, [Southern Europe will continue to gather financial revenues and the periodical] flight to the sun” will continue (Callaghan, Long and Robinson, 1994). As it is mentioned in the previous chapter, such movement from north to south constitutes the backbone of mass tourism in Europe.

Within the Mediterranean Region, in order to examine the repercussions of such alternative development in tourist industry, four countries are selected. Firstly, Spain as a Mediterranean tourist destination was chosen among Italy and France for being one of the first countries in which mass tourism emerged and for being the leading country in beach holidays. Additionally she has been in progress for developing alternative tourism opportunities parallel to changing tourism trends globally.

Greece as a second example was selected for facing similar phases of tourism development with Spain but at a much later date. Moreover she has also been developing alternative tourism activities in rivalry with Turkey.

Thirdly, Slovenia was chosen as the third foreign case which is trying to promote itself both either sea-sand-sun type of tourism and alternative tourist activities at the same by newly determined tourism policies.

As a fourth example, Croatia was selected as she has chosen alternative tourism activities and especially being promoting the culture tourism to replace the mass tourist activities.

3.2.1. SPAIN

Tourism accounting for 10% of employment and 11.8% of GDP is Spain’s largest industry. 52.4 million of tourists visited Spain in 2003, which is

0.28% more than the year 2002. Although the increase in the percentage of total tourist arrivals has considered to be low when compared to previous ones; but “it contrasts with the 1.3% drop of world tourism mainly due to global climate of political and economic instability and uncertainty” (Ministry of Economy, General Directorate of Commerce and Investments 2004:1).

TABLE: 4 NUMBER OF FOREIGN TOURIST IN SUN AND BEACH MARKET

NUMBER OF FOREIGN TOURIST IN THE SUN AND BEACH MARKET	
Country	Number of Foreign Visitors (million)
Malta	1.133.814
Morocco	1.965.338
Cyprus	2.418.233
Bulgaria	3.337.750
Egypt	4.906.000
Tunisia	5.063.600
Croatia	6.960.350
Turkey	13.248.176
Total Competitors	39.033.261
Spain	52.083.443
Source: Ministry of Economy, General Directorate of Commerce and Investments, 2004	

Spain is one of the most important tourist destinations in the world and “undoubtedly the leading country for beach holidays” (Spanks, 2003: 1). According to World Tourism Organization’s Overview 2002, among World’s Top Tourism Destinations, Spain is the second largest destination after France in terms of international tourist arrivals and the second in terms of International Tourism Receipts generated after United States.

TABLE: 5 INTERNATIONAL TOURIST ARRIVALS YEAR 2002

INTERNATIONAL TOURIST ARRIVALS				
RANK	WORLD	2002	CHANGE (%)	SHARE (%)
			2002/2001	
		703	2.7	100
1	France	77.0	2.4	11.0
2	Spain	51.7	3.3	7.4
3	United States	41.9	-6.7	6.0
4	Italy	39.8	0.6	5.7
5	China	36.8	11.0	5.2
6	United Kingdom	24.2	5.9	3.4
7	Canada	20.1	1.9	2.9
8	Mexico	19.7	-0.7	2.8
9	Austria	18.6	2.4	2.6
10	Germany	18.0	0.6	2.6
Source: World Tourism Organization (WTO, 2004)				
	Turkey	13.2	13.8	1.88
Source: Ministry of Culture and Tourism Official Web Site				

TABLE: 6 INTERNATIONAL TOURISM RECEIPTS YEAR 2002

INTERNATIONAL TOURISM RECEIPTS (US\$ billion)				
RANK	WORLD	2002	CHANGE (%)	SHARE (%)
			2002/2001	
		474	3.2	100
1	United States	66.5	-7.4	14.0
2	Spain	33.6	2.2	7.1
3	France	32.3	7.8	6.8
4	Italy	26.9	4.3	5.7
5	China	20.4	14.6	4.3
6	Germany	19.2	4.0	4.0
7	United Kingdom	17.8	9.5	3.8
8	Turkey	11.9	18.22	2.5
9	Austria	11.2	11.1	2.4
10	Hong Kong (China)	10.1	22.2	2.1
11	Greece	9.7	3.1	2.1
Source: World Tourism Organization (WTO, 2004)				
Ministry of Culture and Tourism Official Web Site				

For the last fifty years, Spain has always been among the 10 most visited countries in the world, which demonstrates the great experience Spain has acquired in the tourism sector (Spanish Institute For Prospective Technological Studies, 2001).

TABLE: 7 RANKING OF SPANISH TOURISM

RANKING OF SPANISH TOURISM				
Ranking	1950	1970	1990	1999
1	United States	Italy	France	France
2	Canada	Canada	United States	Spain
3	Italy	France	Spain	United States
4	France	Spain	Italy	Italy
5	Switzerland	United States	Hungary	China
6	Ireland	Austria	Austria	UK
7	Austria	Germany	China	Mexico
8	Spain	Switzerland	Mexico	Canada
9	Germany	Yugoslavia	Germany	Poland
10	Uk	UK	Canada	Austria

Source: Spanish Institute For Prospective Technological Studies, 2001:10

Although the figures show that Spanish tourism have high tourism ranks, general opinion regarding tourism sector was not very optimistic at the beginning of the 90's. It was thought that tourism market was out of date, there was a deficiency in the infrastructure system and public infrastructure could not meet the needs of high volume tourists and the image of Spanish tourist destinations was negative due to urbanized landscape, visual, noise and water pollution (Porrás, 2000).

Common opinion in the market was that "Spain could not compete with new tourist destinations, which had a more modern offer and products more suitable for the new tendencies of demand" (Porrás, 2000:2).

Since the demand for sun-sea-sand product has been consolidated, a policy of diversification in the tourist sector has been carried out. This new policy

... combines with new tendencies for more frequent shorter holidays and different modes of transport to lead people to discover other itineraries and seasons in which to enjoy their leisure time and contribute to easing the seasonal effects of the tourist industry (Spinks, 2003).

Spanish tourism has been an experienced sector of good quality and has learnt to grow, develop and carry put large investments to improve quality at the right time of the global tourism cycle. The sector has also known how to perform better in difficult situations, demonstrating its capacity in terms of quality and competitiveness (Ministry of Economy, General Directorate of Commerce and Investments, 2004: 1).

In the light of these, the first stage was the diagnosis and the analysis of the current situation. 'The Spanish Tourism's White Paper' was prepared in 1990 to set the problems of tourism sector in Spain.

The second stage was the declaration of 'The Competition Framework Plan' in 1992. "The plan included eight action areas, which are:

- Co-ordination
- Quality
- Technical Development
- Destinations,
- International Cooperation
- Training
- New Products
- Statistical and Economical Analysis of Tourism" (Porrás, 2000:3).

This step was followed by the restrictions on urban and tourist development, planning control in popular tourist areas and the investment efforts in public infrastructure i.e. transportation network (air, roads, railways etc.), treatment of supply and waste water, recovery of coastline.

Next step was 'The Comprehensive Plan For Quality In Spanish Tourism'. The plan was prepared with the efforts of both private and public sectors and intended to give response to the challenges that Spain Tourism can face from 2000 to 2006. It was consisted of "...creation of demand for new products ranging from complementary activities to complete holidays, as well as renovating existing offer and generating public investment in infrastructure" (Ministry of Economy, General Directorate of Commerce and Investments, 2004: 2). In other words the aim of the plan is to remain Spain as a leading tourist destination with alternative tourist activities shaped by global tourism trends and complementary activities in the coastal region serving for sustainability, even-out seasonality, products and markets diversification and profitability.

Quality factor has been handled in certain programs as (Porrás, 2000: 5):

- Quality in tourist destinations
- Quality in tourist products
- Quality in tourist services
- Quality training
- Technological innovation and development
- Globalization of Spanish tourist industry
- International co-operation
- Statistical information and economic analysis
- Promotion
- Support in marketing.

The objective was to ensure that concept of quality holiday will be the factor that differentiates Spain from other destinations on the international markets.

A special attention has been given on the program for quality in tourist products, which has been working on promoting activities that contribute to the diversification and reducing seasonality in Spanish tourism.

For the diversification of tourist activities and prolongation of the tourist season the focuses were on developing sports holidays especially nautical and adventure sports, cultural tourism, business tourism, health tourism, rural tourism and holiday homes.

a) Sports Holiday: Suitable climatic conditions, mountainous topography and approximately 5000 km. coastline make Spain one of the most important destinations for the practice of sport activities. While Spain is accustomed to water sports i.e. sailing, sport fishing, diving, wind surfing; the rural areas are facing outdoor sports such as trekking, rock climbing, river and air sports (Ministry of Economy, General Directorate of Commerce and Investments, 2004).

Furthermore Spanish tourism mainly focuses on golf and skiing. Ski resorts have the technical quality and suitable infrastructure to contribute to the quality program of Spanish tourism (Sparks, 2003). Finally as though golf can be played all year round, it will certainly help the prolongation of tourist season in Spain.

b) Cultural Tourism: In order to strengthen the cultural attractions and convert them into a tourist product, the "Plan for the Promotion of Cultural and Linguistic Tourism" was put into practice in 2002 (Ministry of Economy, General Directorate of Commerce and Investments, 2004). Main objective

of this plan is to encourage cultural tourism and to promote cultural diversity of Spain.

c) Business Tourism: From the aspect of congress and meetings, Spain is the fifth most popular destination in the world; additionally Barcelona with hosting 1363 congresses in the year of 2002 is the top of the destinations of business tourism. Additionally in this sort of tourism the aim is to raise the revenues of over 2350 million Euros and the country from its fifth position in the world ranking (Spinks, 2003).

d) Health Tourism: The demand for beauty treatment and relaxation is increasing which in turn resulted in the year of 2002 as 606 million Euros and 18% more than previous year, in the combination of centers dedicated to tourism on health, beauty and wellness. Currently, Spain has 130 health resorts, 24 health and beauty complexes, 50 hotels with their own Spas and 22 thalassotherapy centers which provide a good way to fight against seasonality of Spanish tourism. Moreover to be differentiated and more qualified than health resorts and thalassotherapy centers, certain hotels try to combine business tourism and health tourism to be more compatible (Ministry of Economy, General Directorate of Commerce and Investments 2004).

e) Rural Tourism: Spanish rural tourism began at 90s and it is developing year by year. Rural tourism facilities are generally used by Spanish tourist, in other words this sort of tourism is a domestic product. But with the year 2002 number of establishments in this sector grew 12.2% with a considerable rise in the total number of foreign visitors (Ministry of Economy, General Directorate of Commerce and Investments, 2004).

f) Holiday Homes: With holiday homes the contribution to easing seasonality, developing population centers and attending new tendencies

related to the different work habits and ways of enjoying one's leisure time have been foreseen (Sparks, 2003). According to World Tourism Organization, in the next five years more than 1 million European families are going to own their second home in Spain due to suitable conditions for climate, modern infrastructure, and quality tourism,

To conclude, all those tourism activities are encouraged to diversify the current ones and extend the tourist season. Furthermore the studies to combat the seasonality have got significant results in lengthening the tourist season. While the months of July and August have moderated their figures, total number of tourist arrived in September have increased by 10% in 2000 compared to previous year and increase by 3.5% in October (Ministry of Economy, 2004). Thus, orienting its marketing activities from sun and seas to alternative products is considered as a success in diversification and prolongation of Spanish tourism.

3.2.2 GREECE

Tourism industry contributes to Greek economy with 16.3% in GDP and tourism receipts in 2002 were 10,285 million Euros. Employment in the tourism sector is 14.4 % of total employment in Greece with 590.600 directly related jobs (Dessylla, 2004).

The development of tourism in Greece mainly based on mass-market model containing popular sun-sea-sand destinations. Although these elements constitute numerous advantages for Greece as a tourism destination; the given facts have changed and a differentiation of the tourism model is required.

Greek tourism industry in first stage stressed on the weaknesses and strengths of the current tourist activities and the need or alternative forms of tourism.

Several weaknesses have been determined within the current structure of Greek tourism sector namely (ELKE: The Hellenic Center for Investment):

- High seasonality and high density in peak seasons
- Dominance of mass tourism
- Lack of thematic and alternative forms of tourism
- Unhealthy public infrastructure.

On the other hand strengths of the Greek tourism are identified as (ELKE: The Hellenic Center for Investment):

- The increase in the number of tourist arrivals
- Diverse natural beauty
- Cultural and historical heritage
- Vibrant folklore, Greek way of life.

Next step was to formulate new tourism strategies as “shifting form low-budget mass tourism to high quality and alternative forms of tourism” (ELKE: 6). in the light of radical changes in the leisure industry linked to increasing demand for alternative and integrated forms of quality tourism. It is believed that the success of Greek tourism as an international tourist destination will depend on upgrading and modernization of tourist industry, the development of alternative tourist activities and the prolongation of the tourist season with the prospect year-round tourism (Pangalos, 2003).

Under the light of global trends in the tourism industry Hellenic Tourism Organization, an institution of Greek National Tourism Organization responsible for carrying out the market researches and studies, stating

tourist opportunities for investors, making research on the thematic and alternative forms of tourism, has determined a strategic plan for tourism development called “National Plan for Regional Development 2000-2006” to progress high quality tourist activities (Greek National Tourism Organization). This plan supporting the view of alternative tourism as a tool for sustainable development, contributes to the protection and enhancement of the environment.

National Plan for Regional Development focuses on the development of golf tourism, marine tourism, conference tourism, and thermal tourism i.e. spas, thermal springs etc., winter tourism and eco tourism (Dessylla, 2004).

a) Golf Tourism: Greece having a mild Mediterranean climate and suitable temperature in winter months is considered to be an ideal golf location, additionally the development of golf tourism, which is one of the increasingly developing activities in the international tourism market, is seen as an essential aim and priority of Greek tourism policy.

On the other hand it is considered that development of golf tourism will not solve all the problems of Greek tourism, but it can certainly be a factor contributing to the objectives of extending tourist season and leading from leisure to theme activity tourism. Therefore Hellenic Tourism Organization has been carrying out studies concerning the development of golf courses such as renovation of existing ones, determining new areas for development and proposing golf courses for other tourist destinations where possible.

b) Marine Tourism: Sailing and cruising are accepted to be most popular summer activities in Greece, thus certain studies have been carried out to increase the total numbers from existing 15 marinas to 34 marinas.

Moreover 9 more marinas are expected to be tendered in the following years (ELKE).

c) Congress- Conferences Tourism: Regarding the increase in demand for conference and congress tourism, Greece has made conference centers one of the main focuses of her tourism policy. Organized programs are determined including congresses and year-round sightseeing referring to natural beauty, cultural and historical assets.

d) Thermal Tourism: Thermal springs and related tourism products such as hydrotherapy and spas constitute a major component of prolongation of tourist season. These activities are not subject to seasonality as they are directly related to health services. Also they can combine with other forms of tourism such as golf courses, conference tourism, health and beauty facilities, wellness towns etc.

e) Winter Tourism: To strengthen the policy of extending tourist season, Greece has been promoting her mountains and forests that offer great potential for winter tourism. Additionally infrastructure of most ski resorts has been renewed and the rest are currently being upgraded.

f) Eco-tourism: The concept of sustainable development gives force to Greek tourism industry to develop eco-tourism. Over last four years, many traditional villages have been revived including forest paths, sightseeing points with local constructing materials. Those studies were resulted in shifting of the tourist interest from standard 3S holiday to this sort of activity. Local festivals introducing the Greek way of life, traditional food products from Mediterranean Cuisine are the complementary factors of such leisure activity. It is considered that eco tourism is a new and hopeful activity that will develop quickly in the near future, thus investing in eco tourism will contribute to promoting Greek tourism.

To sum up, the pattern of tourism development in Greece has been shifting from mass movements of sun-seeking activities to year-round tourist activities regardless of season. Greece is in the process of developing infrastructure system i.e. transportation, airports, railways, road network, ports, energy and telecommunications. On the other hand when the focal points in new tourism strategy of Greece are examined, it can be seen that while developing special activities regardless of beaches, facilities that contribute to sea-sand-sun type of tourism are being promoted. Greece is in a position that at the same time she has to catch the global tendencies of tourism cycle in the world and she has to upgrade her coastal activities and revive them. In other words, developing marine tourism will contribute to the activation of coastal activities, additionally promoting golf tourism, congress tourism, thermal, winter and eco tourism activities will provide to combat with seasonality.

3.2.3 SLOVENIA:

Tourism sector in Slovenia is contributing to Slovene economy with 9.1% in GDP and 52.500 directly jobs and planned to become one of the leading branches of Slovene economy (Ministry of Economy, Government of Republic of Slovenia, 2001).

Slovenia has defined its first development strategy related to tourism called "Strategy of Slovene Tourism in the 2000-2006 Period" which determines basic orientations for its handling in the international tourist market with respect to changing trends.

Next step was to determine the advantages and weaknesses of Slovene tourism. The advantages were stated as (Ministry of Economy, Government of Republic of Slovenia, 2001):

- Variety and attractiveness of natural environment

- Undamaged natural remarkableness,
- Disperse and relative smallness of tourist centers instead of mass tourism and development of them according to tourist trends.

On the other hand the weaknesses of Slovene tourism were identified as (Ministry of Economy, Government of Republic of Slovenia, 2001):

- Little attractiveness of products and services
- Few tourist attractions
- Low quality of services
- Weak development in infrastructure
- Unsuitable offer in winter tourism.

Following stage was to define the basic strategy as to offer attractiveness and variety in destinations, remarkableness and uniqueness of tourist product and to decide on the other identities and formulate Slovene identity in tourism.

While Slovenia tries to promote her tourist opportunities, as she has surrounded with huge competitors i.e. Austria, Italy, Hungary and Croatia, it is considered that Slovenia does not have enough competitive advantages. On the contrary it is expected that Slovenia may use her tourist destinations offering better organizations and quick access to original and qualified tourist products within an environmentally sound policies referring to global tourism markets.

Under the light of this strategy basic themes of Slovene tourism focused on three basic regions namely; productive region including health resorts, business tourism; geographical region with natural and cultural facilities and thematic parks, and thirdly program region consisted of 3-E (ecological, ethnological- ethological) country tourism, 3-A (active- action-

adrenaline) recreation tourism and 3-D experience and imaginary tourism (Ministry of Economy, Government of Republic of Slovenia, 2001):

a) Thermal Tourism: Certain studies have been undertaken to define the program and the range of products in thermal tourism in order to make this sort of tourism the most successful part of Slovene tourism. In the light of this objective, modernization of revitalization of all thermal health resorts and construction of new ones were carried out. In order to attract more tourists for all year round, additional facilities were included i.e. conducting seminars, preparing congresses within health resorts, wellness and relaxation program, maintenance program in beauty and cosmetic etc.

b) Business tourism: This sort of tourism covers the congressional activity i.e. congresses, conferences and seminars; social meetings, business and intergovernmental trips, fair activity and various forms of motivation trips that is co-called MICE tourism, namely meetings, incentives, conventions and events.

“Congress activity is a form of modern business tourism with a significant share in the existing Slovene tourist offer” (Ministry of Economy, Government of Republic of Slovenia, 2001: 28). As though congress tourism does not depend on seasonal activities, Slovene tourist industry perceives this sort of tourism as a complementary activity for all other tourist destinations especially the health resorts.

c) Natural and Cultural Activities: Within this sort of tourism, a great variety of activities take place such as winter tourism and coastal tourism activities, nature and cultural assets of Slovenia.

Referring to natural assets, Slovene tourist industry has been promoting special activity centers including lakes, caves, natural protected regions, rivers, canyons and natural thematic parks.

Furthermore among the winter sports, skiing is on the agenda of Slovenia and to act as all year quality tourist services complementary units are planned as mountain health resorts, wellness programs at ski resorts etc.

According to the policy of creating the one's identity, Slovene tourist sector, stresses on the modernization and protection of cultural heritage and combination of existing tourist programs of cultural assets into integral tourist products.

While developing alternative tourist activities, tourism sector has also been fostering coastal activities in Slovenia. Nautical tourism is considered as the most profitable activity within the coastal activities. Well-equipped marinas are being foreseen including accommodation units, - commercial facilities etc.

Additionally youth tourism is foreseen as an important activity. It is considered that creating tourist action areas for youth will bring about long-term effects on the country's tourist profile.

d) 3-E tourism: 3-E tourism covers a large part of Slovene rural environment that "offers numerous tourist attractions as well as tourist products and services i.e. restaurants, castles, tourist farms, sacral building, wine tourist roads, forest paths etc." (Ministry of Economy, Government of Republic of Slovenia, 2001: 36). Accordingly ecologically preserved rural areas having cultural diversified rural environment are chosen to be promoted. A special emphasis has been given to country way of living, cooperation with local population etc.

e) 3-A tourism: Regarding natural concentrations of Slovenia, 3-A tourism has become very important within the tourist industry. Slovenia has diversified active holidays and sports programs, which are oriented especially for young tourists and the ones with special recreation needs i.e. searching for attractive regions, experiencing adrenaline feelings etc. The activities prompted are climbing, mountaineering, water sports on rivers and lakes, special fields of green sports like golfing, cycling, horse riding etc.

f) 3-D tourism: 3-D tourism is oriented towards adventures with the aim of having closer contact with less developed areas in terms of economic and tourist development where tourism can be a great opportunity. 3-D tourism includes tourist offer based on experience and imaginary attractions. Programs designed within 3-D tourism are “touring tourism, family tourism, rural tourism, theme parks for children, special adventures etc.” (Ministry of Economy, Government of Republic of Slovenia, 2001: 39).

Although tourism sector of Slovenia has classified certain activities into groups, it can be seen that those activities are closely related with each other with the groups themselves. That is to say, activities under the heading of natural and cultural activities and 3-A tourism may overlap in certain sport facilities. Furthermore in order to attract more tourist, complementary activities are being served as the combination of winter and health tourism, business and natural activities and also health tourism; 3-A and coastal activities etc.

The objective of all those combination is to extend the tourist season and held target groups for all year-round, as the common idea is that “tourism comes always more massive but at the same time more individual and that is why a huge differentiation program is needed” (Ministry of Economy, Government of Republic of Slovenia, 2001: 3). Sports, cultural activities,

business tourism etc. are the tourist activities that develop quickly and also travel tourism on coasts, lakes, rivers have important role in the tourist movements. Therefore Slovene tourist industry determined such headings of tourist activities in order to develop and put them together at the same time.

To conclude tourism is accepted as the most important economic activity therefore it is considered to base on the quality service and sustainable development principles. Therefore the objective is to improve the quality and diversify the activities that contribute to environmental protection.

3.2.4. CROATIA

In Croatia, tourism sector has been considered among the major employers and mainstays of the nation's economy, additionally its largest source of foreign exchange. The 2003 tourist season brought about US\$ 7.9 billion tourism revenues to Croatia, which is 7% higher when compared to previous year (Bulic, 2002).

Croatia has been among European destinations, with natural attractions of 1104-mile Mediterranean coastline, dotted with 1185 islands, and rich cultural and historical heritage. Croatia has possessed ecologically preserved environment and unspoiled attractions i.e. Adriatic Sea, natural parks, thermal springs etc. Based on the importance of tourism for the Croatian economy, and on the desire to utilize available resources and potentials for the future in the best possible way, the Croatian Government adopted Development Strategy of Croatian Tourism in 1993 (Bulic, 2002). This Development Strategy foresaw:

- Main starting points and guidelines compatible with Croatian interests in tourism

- Basic aims of development of the Croatian tourist sector
- List of priority activities and the policy for steering the development of Croatian tourism

Parallel to Development strategy of Croatian Tourism Croatia's Tourism cluster began considering new ways of developing the Croatian Tourism industry and providing guidance to tourism enterprises and policymakers in 2002. The aim was enhancing the competitiveness of Croatia in the global tourism marketplace and increasing the country's economic benefits from tourism, depending on conservation and sustainable development (Jelincic, 2000).

In order to take advantage of developments in the international market place and improve its profitably in a sustainable manner, Croatia's tourism industry has considered improving its competitiveness. With the concept of improving competitiveness Croatian tourism sector expected upgrading of the tourism industry to have a diversified and highly valued products and qualified services. In other words within the short-term, it was aimed to distribute of the visits of foreigners throughout the year, and to increase the amount of money that they have spent (The Croatian Tourism Cluster, 2003).

Croatia's tourism sector has been using mass tourism strategy although it is currently recognized that this strategy was not Croatia's best interest. Accordingly Croatian Tourism Cluster considered that the mass tourism, which positioned Croatia in a low-cost destination attracting low spending tourist, has been inappropriate for Croatia. The major target should be developing a high-value added, high quality product with a fundamental base of sustainability that could replace mass tourism, which was blamed for depleting natural resources. Additionally with sustainable tourism

development, living standards were expected to rise without destroying the natural assets; riches of cultural heritage, and distinctive lifestyle and also tourism revenues would stay in local community, which in turn increase the profitability of such local community.

The following progress in Croatian Tourism sector was the fostering cultural tourism. With this progress Croatian tourism development strategy has turned into the usage and promotion of Croatian cultural resources. Although many tourist programs included culture as part of the tourist package was not enough, as most of these cultural programs have been imported from international markets, thus they were not using Croatian cultural distinctiveness and local assets as tourist resources. Cultural distinctiveness was a comprehensive feature, beyond merely visiting heritage sites, churches and museums, but it was the utilization of every aspect of Croatian culture - food, wine, the landscape, activities and even the language. It also included the involvement of the visitors with locals and made every tourist a cultural explorer and discoverer.

The objectives of the development of Cultural Tourism Strategy have included apart from increasing visitors, the prolonging the season; extending the geographical base beyond the beach and into the hinterlands and; guaranteeing sustainability; encouraging micro-business development and economic prosperity (Jelincic, 2000)

- Prolonging the Season and Extending the Geographical Base:

So far, Croatia has been selling only sea, sand and sun, based tourism activities. On the other hand cultural tourism development would properly stimulate progress of tourism in other seasons than summer. Cities located along the coast have normally focused on using their coastal position as the primary benefit in tourism and have only been

using culture and other facilities as a secondary tourist resource. In such a case, cultural tourism would be the means of extending the season, but Croatian tourism industry have desired that inland cities should also develop their own cultural tourism programs and accordingly double the number of tourists who visit locations away from coasts and stay there more than one night (Croatian Tourism Industry).

Additionally, in order to extend the tourist season, Croatian tourism industry has been developing other tourist activities such as sports, mountaineering and hiking, excursion to religious places, activities related to flora- fauna and natural beauty, gastronomy, nautical tourism and health tourism. Also, construction of golf courses has considered among the most necessary and indispensable elements of the development of a quality tourist offer and as a chance of changing of traditional prevailing market image as a country of seasonal and mass tourism.

- Guarantee of Sustainability and Encouraging Micro-Business Development:

This is the integration of local community to tourism activities, as it has been considered that if a local community is able to integrate their everyday businesses and professions into the tourist activity and accordingly present their local lifestyle, it will raise the quality of tourist visit, as well as the quality of local population life. Additionally, the development of traditional crafts, art galleries, restaurants offering local food and beverages have to be stimulated. The important point of such a strategy was that the owners of such businesses should come from the local population.

Meanwhile the components of Croatian Tourism industry have defined themselves certain roles in promoting Cultural tourism. While accommodation units will both meet the standards of international markets and offer standards of service that reflect Croatian cultural standards, restaurants will offer innovative cuisine that draws on Croatian customs and local ingredients, building on the Croatian tradition of gastronomy and exposing historic influences of other cuisines and tour operators will highlight cultural, historical, and natural wonders unique to Croatia (The Croatian Tourism Cluster, 2003).

As products diversified and destinations position themselves in new markets segments, quality has become more important. Therefore the Croatian Ministry of Tourism aimed to promote quality tourism by encouraging local families to develop small, boutique-type hotels that would be environmentally, socially, and economically sustainable. There has been a movement in the direction of higher-value added tourism, as accommodation facilities themselves were engaged in organic farming to promote high quality gastronomy and other forms sustainable tourism development.

Croatian cultural tourism has a vision of exposing Croatia's nature, culture, and society to the world. These assets were thought to contribute to the wealth of the Croatian people, business and communities, but they should not be overused for short-term gain and should be preserved for the future generations. The guiding principles of this vision were (The Croatian Tourism Cluster, 2003):

- The diversity of regions, and historic and cultural ties would be utilized and the identity of tourism industry would be constituted accordingly.

- Tourism in Croatia would ensure the sustainability of nature, culture, and cultural heritage, and retain socioeconomic balance and living communities. The business environment for tourism services would be open, and transparent to provide society's control over the preservation of natural, cultural, and community resources.
- Tourism would be treated as an aspect of the economy and a way of life rather than an industry sector. All matters helping to develop sustainable tourism such as transportation, infrastructure services and privatization will be equally facilitated and promoted by the public authorities. Services for tourism will be integrated into the life and economy of the country and especially within the local communities of the tourism destinations.
- Tourism services will offer rich, authentic, unique experiences with a standardized price system, and seek to enhance quality of destination, product and service standards.

With realization of the above listed targets and implementation of the stated policy, Croatia may reach a level of total number of foreign visitors amounting to 10-11 million, and approximately 6-7 billion Euro in revenue from over-all tourist consumption by the end of this decade (Bulic, 2002).

To sum up, Croatia has been a Mediterranean tourist destination serving for mass tourism. Croatian tourism industry has also been aware of the changing consumer preferences and global tourism tendencies. Regarding these, cultural tourism is considered an alternative activity to replace mass tourism as mass tourism has been blamed for depleting the natural resources. Instead with a sustainable manner, developing small-scale activities respectful to local communities and life styles would be chosen.

They have seen cultural tourism as a rival to mass tourism and in the long run the tourism industry was expected to gain more revenues than mass tourism has been generating up to now by utilization and promotion of the countries' cultural identity, historical and natural assets.

When selected countries are examined, the common feature they have is their mass tourism potential. Except Slovenia, the other three cases have a remarkable position in international mass tourism market. If the cases are handled in detail, the attempt of relevant authorities to determine certain strategies to interfere with the progress of tourism development can be observed. That is to say those Mediterranean countries are now in a position to shift the emphasis on promoting alternative modes of tourism rather than insisting merely on mass tourism destinations. Rather than Croatia the rest of selected examples have been recognizing alternative modes as complementary activities to current beach potential. But Croatia is blaming mass tourism for depleting natural resources, damaging environment and bringing low spending tourist, thus rejecting further development of mass tourism.

The purpose of examining Mediterranean countries is to show the attitude of popular mass tourist destinations to recent trends and globally changing tendencies towards alternative modes of tourism. Such kind of an attitude is closely related with Turkish tourism policies as rival tourist destinations are going one step further and adding new features to their current tourism potential. In this point in order to compete with them, Turkey has to analyze what has been done in tourism sector up to new millennium and has to determine new strategies to foster her current position in international tourism market.

CHAPTER IV

EVOLUTION OF TOURISM SECTOR IN TURKEY

Tourism industry, being a part of the national economy, has attracted government interest and interventions in many countries. Government concerns mainly depend on the socio-economic benefits of tourism industry and the necessity to protect national resources. The interventions have the aim of increasing the benefits and minimizing the damages of tourist flow on social, cultural, environmental assets of the country (Tarhan, 1997).

In Turkey tourism policies can be examined through four phases depending milestones of the tourism industry regarding the government attitudes. Similar to the evolution in Europe, tourism especially the international tourism could not gain any significance or priority for the Turkish government until 1950. "On the contrary, because of the war psychology, foreign visitors were taken with suspicion by the authorities and their arrivals tried to be reduced" (Tarhan, 1997:61). This era was the birth of New Republic and the efforts to set national policies, where tourism policies could not gain so much importance. Therefore the first era was the years of 1923 to 1950. The initial studies of organized tourism activities took start within this period, too.

With 1950s government interest in Turkish tourism has started to show steady rise parallel to the developments in international tourism, and governments have started to deal with the economic benefits of tourism sector in creating currency flow and new employment opportunities and with its being the modern means of development. Such an ever-increasing government interest in tourism industry has shown itself in various tourism

organizations and institutions. This era was the recognition period of the tourism sector and started with 1950 and ends with 1980.

1980s had witnessed noticeable development in the tourism sector with the legislative improvements, ongoing physical plans, infrastructure upgrading etc. This period can be called as the “First Attack in Tourism Development” (T.C. Turizm Bakanlığı, 2002) as such progresses have depended on relatively more comprehensive attitude. The period between the years of 1981- 2002 can be defined as the third phase of tourism sector.

Final stage has started with the Second Supreme National Council On Tourism organized in 12-14 April 2002 and can be called as New Era. This period is also called the “Second Attack in Tourism development” (T.C. Turizm Bakanlığı, 2002), regarding the changing vision and new policies of tourism sector.

4.1. THE FIRST PERIOD: INITIATION OF TOURISM ACTIVITIES (1923-1950)

Tourism affairs in Turkey have started with the Traveler’s Association in 1923, which dominated the tourism policy in Turkey. This association changed its name into the Touring and Automobile Club in 1930 (Nohutçu, 2002), which served for the tourist, who especially came to Istanbul, in accommodation opportunities, it regulated the prices list of tourist destinations and organized meeting, congress and courses for the training of tourist guides. Moreover it was for more than a decade responsible for tourism activities in Turkey. (Aker and Serter, 1989).

In 1934, the Ministry of Economy opened a bureau called Turkish Office under the department of Foreign Trade, in order to deal with tourism

affairs. That bureau was the first tourism department established at a level of section within the ministry (Aslanyürek, 1984).

In 1937 this bureau became independent and then a part of Ministry of Commerce in 1939. The following year the tourism section was taken into the General Directorate of Press.

In the year 1949, Department of Press was reorganized and converted into General Directorate of Press, Publication and Tourism.

Through this period, tourism could not go beyond the small departments under certain institutions. The only significant event was the meeting of Tourism Advice Committee in 1949, and this committee played an important role in the formulation of national tourism policy by preparing Tourism Master Program (Notuhçu, 2002).

4.2. THE SECOND PERIOD: THE INITIAL DEVELOPMENTS IN TOURISM SECTOR 1950-1980

The early 50's witnessed considerable increase of government interest in tourism, as Turkish economy was suffering from critical shortage of foreign currency and serious deficit at balance of payment due to the liberalization of international trade that resulted in a sharp increase in imports and a very small increase in exports. International tourism was considered among the basic measures taken to increase foreign currency earnings to be a solution for the deficit at balance of payments of the country (Tarhan, 1997). Therefore main objective was to reshape the tourism industry in order to attract and accommodate international tourism demand (Nohutçu, 2002).

In order to increase tourism investments government decided to establish tourism facilities in accordance with international standards. Such tourism facilities were planned as pilot and model investments for private sector to show how such facilities should be designed, built, furnished and operated. To carry out such task, Pension Fund was commissioned. Pension Fund built İstanbul Hilton, Tarabya, İzmir Büyük Efes and Büyük Ankara Hotels in compliance with this policy. Moreover the aim was starting tourism activities at these potential destinations, as well. Additionally those new facilities were rented to foreign investors to introduce high standard management to Turkish tourism market (Tarhan, 1997).

Second important progress in that era was the enactment of the Law for Encouragement of Tourism Industry (Law numbered 6086) in 1953. The importance of this law was that it was the first attempt to set a regulation to administrate tourism facilities in accordance with a policy. The law brought a Licensing System for the tourism facilities, meaning these facilities were obliged to fulfill certain standards and service quality to obtain the Tourism Certificate.

With those requirements, it was aimed

- To reach tourism facilities to contemporary standards,
- To provide incentives i.e. a credit system for tourism activities,
- To achieve uniform standards for similar type and class of accommodation facilities,
- To introduce a new price control system for tourism licensed operations,
- To provide a checklist for new investors including necessary equipments, accessories and services needed at accommodation units of certain kind and quality (Tarhan, 1997:63).

The Law also introduced a commission to evaluate the applications of tourism certificate. The members of this committee were the representatives of government and private sector, meaning that there has been a comprehensive evaluation of applications.

Thirdly Tourism Bank was founded in 1955: (T.C. Turizm Bankası, 1985:9)

- To carry out promotion activities for the development of domestic and international tourism
- To establish travel agencies and organize tours
- To have relations with all tourism institutions
- To be involved in creating new capacities especially in establishing pilot and sample tourism facilities, when and where needed
- To provide credits for private sector in tourism investments, operations.

During 50's high government interest in tourism was the result of increasing international tourism potential in Europe; as well as critical shortage of foreign currency of Turkish economy. An indication of this high interest was the reorganization of General Directorate of Press Publication and Tourism and upgrading of it to ministerial level in 1957. New institution was named as Ministry of Press Publication and Tourism and this was the first time tourism became a ministerial affair (Aslanyürek, 1984).

Fifth important fact within this era was the establishment of State Planning Organization in 1961 to adopt a centrally planned economic model. This new model was set to serve for the optimum use of natural resources and maximize the economic growth with five-year development plans. Such plans are obligatory for public sector and they are only the encouraging guides for private sector.

Development plans mostly indicated three basic objectives for tourism sector, which were:

- Tourism resources of the country would be utilized in a way to increase their contributions to national economy and balance of payments.
- Holiday opportunities of working population would be increased.
- Tourism resources of the country would be used in the balance of utilization and protection (Olalı, 1984: 180).

The First Five Year Development Plan was put into action for the years 1963-1967. Initially the instruments of tourism policy, means and ends of tourism industry were defined with this plan. Importance of tourism as an economic tool i.e. its currency-generating role was stated. The aim was to make investments to create maximum amount of accommodation facilities where possible in order to meet minimum need (Turizm ve Tanıtma Bakanlığı, 1975), which would soon increase the revenues as well. The state and the private sector would both act in tourism activities; the state would undertake the building of infrastructure, rehabilitating transportation and upgrading communication, additionally provide health and hygiene, while private sector would make tourism investments.

According to this strategy, objectives of this plan were (Aker and Serter, 1989: 52):

- To utilize natural and historical resources,
- To make necessary investments
- To vitalize gift industry
- To extend the stay period of foreign tourists

- To invest in areas having high tourism potential, and to intensify tourism activities in Marmara, Ege districts and in the city of Antalya (Nohutçu, 2002) due to the scarce national funds.

To provide these objectives, national parks and holiday villages were planned, tourism agreements with other countries were made and market searches for tourism demand and supply had been carried out. Although above mentioned stages were faced, tourist industry could not reach the targets in tourism revenues (Olalı, 1984).

Establishing the Ministry of Tourism and Promotion was the other event of this era. In fact the Ministry was renamed as Ministry of Tourism and Promotion in 1963. Such a ministry for tourism sector responsible for guiding, supporting, coordinating and supervising tourism activities was the indication of government interest in this sector. The Ministry undertook the responsibility of licensing and standardization of tourism establishments, planning, coordinating (Nohutçu, 2002) etc. and began to set local bodies named as Tourism Information offices and overseas offices (Tarhan, 1997).

Following development was the establishment of Tourism Coordination Committee within the State Planning Organization in 1963. This committee was chaired by the Minister of Tourism and the members were the under-secretaries of state for the ministries, i.e. Works, Reconstruction and Settlement, Forestry etc. The management of this committee was transferred to Ministry of Tourism and Promotion in 1971 with other powers on planning for tourism (Nohutçu, 2002).

The Second Five Year Development Plan was put into practice for the years 1968-1972. As though the policies of the first plan and the implementations made accordingly constituted a gap due to the lack of

physical plan, Second Plan had stressed the importance of national physical planning (TURSAB). Additionally this plan had focused benefiting from economic, social and cultural aspects and had foreseen the utilization of such functions (Aker and Serter, 1989). The objectives were (Olalı, 1984: 180):

- To increase foreign tourism revenues, number of tourists, average consumption rate
- To develop domestic tourism,
- To foster the mass tourism activities in priority areas,
- To support such activities with financial, legal measures,
- To promote tourist activities,
- To rehabilitate infrastructure network in the hands of public sector,
- To encourage private sector for the establishment of other tourism facilities.

To fulfill those objectives, the coastal region in 3 km depth from Çanakkale-Balıkesir province boundary to Antalya- İçel province boundary had declared as the tourism development region to utilize the mass tourism development with the decision of the Council of Ministers in 1969, while existing patterns in Turkey were defined by cultural interest rather than mass tourism motivations (TURSAB). Moreover Ministry of Tourism and Promotion in coordination with the Ministry of Reconstruction and Resettlement had started preparing tourism oriented physical plans in those regions to realize the policy of Second Five Year Development Plan to fulfill the gap between development plans which had no spatial dimension and the implementation projects (TURSAB).

In 1972, the law organizing Travel Agency operations and establishing Union of Travel Agents (TURSAB) was enacted (Law numbered 1618) and

Union of Travel Agents, a non-profit organization, was founded to represent travel agents, to assist The Ministry on promotional activities, to maintain professional ethics at travel agency activities and to protect consumers. Such law had two significant characteristics, which were the enabling attitude towards government on controlling travel agency activities, and reflecting the critical foreign currency shortages of those years (Tarhan, 1997).

For the years 1973- 1977 Third Five-Year Development Plan was put into practice and private sector was determined to carry out whole investments, and public sector was placed to intervene when private sector could not accomplish the tasks. The general tendency was towards mass tourism. Investments would be on mass tourism developments. All promotional, investment, public control and organizational activities were defined to overlap with mass tourism's principles. In order to provide imbalanced development, strong relations between land use, infrastructure and physical plans were set reserving national parks, coastal areas for the public use (Olali, 1984).

The policy of developing domestic and social tourism was among the important issues of this period. With Third Five Year Development Plan, it was stated that in order to provide domestic tourism opportunities, necessary measures would be taken. Therefore the focus was on this sort of tourism. Social tourism was defined as the type of tourism, practiced by those who would not be able to afford the cost of a holiday without assistance of a public and/or private organization (Tarhan, 1997). The subject of this practice is low-income people who cannot afford a holiday on their own economic possibilities. For these people a holiday could not be possible without the assistance and subsidy of a public or private organization. The assistance or subsidy can be provided by government departments, local authorities, employers, trade unions, and welfare

organizations. For this reason social tourism is also called subsidized tourism (Aslanyürek, 1984).

First significant government action on domestic tourism was to establish low price, public holiday facilities (Kamu Kampları) for public sector employee. These facilities have increased every year and reached to a capacity of 60.000 beds. After 1972, government implemented a credit program to encourage family pensions aiming to increase low price accommodation capacity at established holiday resorts. Incentive measures aimed to motive families to convert some of their rooms to low priced accommodation for middle-income tourist (Tarhan, 1997).

As mentioned before, the aims of Five Year Development Plans were to intensify tourism activities in high tourism potential regions in order to reduce infrastructure coasts and maximize the currency invested. In compliance with this policy, South Antalya Tourism Development Project was constituted.

The South Antalya Tourism Development Project is the most outstanding integrated tourism development of Turkey, which incorporates from the beginning, planning- programming- finance and operation stages within one project (Inskeep, 1991:1).

The South Antalya Tourism Development Project covers an area southwest shore of Antalya, 80 km long, 3-10 km in depth. This entire project is within the Olimpos- Beydağları National Park. Within the project area, there are seven organized tourism development areas namely Kemer, Beldibi, Çamyuva, Göynük, Tekirova, Adrasan and Çıralı. Additionally there are three ancient cities, which are Phaselis, Olimpos and Idyros.

The South Antalya Tourism Development Project aimed to create the bed capacity to meet the accommodation needs of foreign visitors as well as Turkish population with a capacity of 25.000 beds to serve for mass tourism (Turizm ve Tanıtma Bakanlığı, 1980: 35), besides total bed capacity has reached to 80.000 beds with new millennium. With this project, it was aimed to serve mostly 80% international tourism, foreign market and thus obtain foreign currency which would bring positive benefits to the balance of foreign trade of the country. Main principle was developing mass tourism. Accommodation facilities and other superstructure investments would all be planned according to the needs of mass tourism (Ministry of Tourism and Information, 1975).

Planning studies of the South Antalya Area started in 1974. In 1976, the master plan with the scale of 1/25.000, and the feasibility studies were completed and an application was made to the World Bank to obtain the necessary credit of US\$ 26 million (Inskeep, 1991:1).

The base of this project depended on the 1/25.000 scaled Southwest Antalya Master Plan, which aims:

- To provide and increase the support of tourism sector to the economic and social development of region,
- To realize a balanced regional development,
- To maintain the integration of tourism and other sectors,
- To protect natural environment while meeting the recreational need,
- To create differentiated tourism supply to serve a variety of tourist group,
- To establish accommodation facilities that uses the surrounding settlements for food, beverage and services, but not to create facilities that can be self- sufficient,

- To provide social interaction,
- To determine and protect the boundaries of the ancient city, Idyros,
- To preserve forestry areas,
- To protect agricultural areas primarily green house and citrus gardens from the viewpoint of the protection of economic interest of the local dwellers (Ministry of Tourism and Information, 1975: 68).

The state has taken all the necessary precautions for the successful implementation of this project. The project had two phases, first of all the State provides additional financial aid and substantial incentives to the private sector for the establishment of tourist facilities. Secondly the private sector (Foreign or domestic investors) investments were directed by states incentives i.e. public land allocation, credit opportunities, all types of high quality infrastructure system for households, public institutions, and accommodation facilities. The state was allocating publicly owned lands for rental (lease) to the foreign and domestic investors who were to provide the accommodation and other tourist facilities. The state firstly resolved the issues relating to land in accordance with existing plans (Tarhan, 1997). The land use of the region would be in two parts, tourist development and urban development areas in general. Tourist areas, which were generally beach oriented, would be sited along the shore, including accommodation facilities, open and closed areas for daily usage and commercial areas, while other urban areas were located behind the tourist zone (Altaş, 1991). Additionally, the state has undertaken activities pertaining on the utilization of the National Park and historical site area with the aim of protecting the natural and historical environment of the region.

Kemer Settlement was selected to be the center of distribution, storage, and entertainment facilities of the region and the state was undertaking the construction of all these necessary facilities (health center, hotel training

center and training hotel, tourism office and municipality building) in Kemer (Altaş, 1991).

During the implementation phase of the project, measures required protecting the health of the both permanent (Local) and temporary (tourists) residents of the region, measures necessary for the protection of existing development, especially the tourist industry, but also agriculture and the other industries and the measures necessary to provide the infrastructure for further development in the region were taken into account (Inskeep, 1991).

South Antalya Tourism Development Project being the first organized and most comprehensive project of the era, has constituted certain benefits not only for local people but for regional and national level, as well. Such benefits can be grouped under three headings; socio-economic benefits for the nation, benefits for local population and benefits for the investors (Inskeep, 1991: 2):

Socio- economic benefits: By South Antalya Tourism Development Project 20.000 new jobs would plan to be provided. With the daily use activities provided in the region i.e. swimming, recreation and entertainment, 200.000 people were planned to come to the region. On the basis of approximately 300.000 foreign tourists staying ten days each, foreign currency over \$450 million dollars would be generated.

Benefits for population of the region: High standards of infrastructure and services (roads, water, electricity, communication, collection and disposal of refuse, sewage, yacht, and marina), advanced health services would be established with the beginning of the project. According to the increasing irrigation facilities, farming yields

would also increase. Such development in the region would lead the possibility of local people participate in tourism activities.

Benefits for the investors: There would be additional finance and incentive possibilities i.e. long-term (49 years) land allocation opportunities with the entire infrastructure provided and there would be the opportunity to employ trained work- force, possibility to invest in secure, well-maintained, healthy environment.

With South Antalya Tourism Development Project, comprehensive decisions were taken with 1/25.000 scaled Southwest Antalya Master Plan and they are still valid with small changes regarding daily needs.

The final event of this period was the fourth five-year development plan. (1979-1983) Main objective of this plan was to develop Turkish tourism as faster as possible under the perspective of mass tourism development and to gain maximum amount of foreign currency. Importance of foreign investors, importance of tourism education and developing organized tourism regions were stated with this plan.

Under the light of above mentioned developments, it can be said that second period of Turkish Tourism Development generally composed of the attempts to set the instruments of tourism industry, means and ends of the progress, as tourism sector gained importance regarding merely its economic benefits, especially foreign currency generating feature of it. State was the dominant factor, to carry out pilot and model investments through certain organizations like Pension Fund, Tourism Bank etc. The main objective was to encourage private investors and in turn to increase bed capacity. Thus the focus was utilizing the coastal regions for mass tourism development, regarding the revenue generating function of international mass tourism. This era was fully controlled with Five year

development plans, which were generally setting policies that did not have any spatial indications. When the total bed capacity was examined, Marmara has been the first region in ranking with bed capacity of İstanbul, followed by Ege and Akdeniz Regions. This showed that investments were still focusing on city hotels rather than mass tourism with recreational purposes. (Günay, 1981: 333). Most significant events of this era were the declaration of Aegean and Mediterranean coastal regions as tourism development region and the constituting South Antalya Tourism Development Project accordingly to shift the focus on mass tourism development. Realization of South Antalya Tourism Development Project raised the importance of comprehensive projects and led the organized developments in following years.

4.3. THE THIRD PERIOD: THE ORGANIZED DEVELOPMENTS IN TOURISM SECTOR 1980-2001

4.3.1. THE PERIOD BETWEEN 1980-1989

With the beginning of 80s, tourism was finally considered among the sectors of special importance for development and contributing to Turkish economy. Since the Tourism sector in Turkey was relatively new, there has been the opportunity to preserve natural, cultural, historical and archeological assets of the country. Contrary to some other countries which suffered from saturation, improper development, seriously damaging environment and many valuable natural assets as well as existing human settlements, Turkish tourism was prepared to sustain the balance between utilization and conservation and Ministry of Tourism determined certain principles when planning tourism areas (Araç, 2001;TURSAB), which were:

- The acceptable use of natural and cultural resources,

- Sustainable tourism development in high potential tourist areas,
- Creation of efficient tourism sector with high international competitiveness,
- Harmonious tourism related constructions with natural landscape,
- Meeting the need of foreign and domestic tourists and the resident population,
- Developing social tourism facilities,
- Extending the economic benefits of tourism,
- Continuous restoration and maintenance of the natural and cultural resources,
- Protection of the tourists and hosts against adverse environmental effects (Ministry of Tourism, 1994; Küce, 2001).

Above mentioned features were the indications of shifting from focusing merely on currency generating feature of tourism, but addition to that recreation and conservation sides were included to the agenda (Günay, 2000: 201).

In 1982 the Ministries of Tourism and Culture were merged to establish coordination between them and to realize these principles and assist the development of Turkish tourism industry. Ministry of Culture and Tourism continued to develop physical infrastructure, monitor construction and investments, coordinate with industry and business organizations, and to promote Turkish tourism domestically and internationally. Special incentives have been introduced to increase the number and quality of beds available. Additionally new training projects took start. Moreover realizing the significance of natural, cultural and historical environment in tourism industry, a sustainable approach for tourism development was adopted as it was believed that tourism development should be

ecologically sustainable in the long term, economically viable as well as ethically and socially acceptable (Küce, 2001).

During that period, Tourism Encouragement Law numbered 2634 was prepared and issued in 1982. The law and 15 by-laws attached to it were designed as the indicator of the new tourism model in Turkey.

Since late 70's conditions of tourism industry and Turkey were changed in great scale and it became obvious that Law numbered 6086 was not being effective enough due to the changes at the conditions and lost its ability to solve the changing problems and guide the developing tourism activities. Certain problems were forcing for new regulations, which were:

- There were not sufficient superstructure investments, which were creating shortage of capacity, and pressure on demand. For this reason, factors limiting the private sector investments had to be identified and to be solved by relevant regulations.
- 6086 and other related regulations were not providing any authority to the Ministry of Culture and Tourism. It was not possible to implement any policy or to coordinate the functions of other entities, without legal tools. There was a lack of coordination as tourism activities have involved a great number of public and private sector organizations. Therefore coordination function of the Ministry had to be defined by the law.
- Tourism investors were not being able to obtain suitable land for tourism investments, which had necessary natural features, right land use plan decisions, relevant size, sufficient infrastructure, and responsible price. On the other hand, renting the state owned land

was also being hard to achieve due to the long and hard bureaucratic formalities (Tarhan, 1997:72).

All these factors were obstructing investments and were slowing down the tourism development in Turkey. Tourism Encouragement Law numbered 2634 brought some solutions to some these problems. The characteristics can be outlined as follows (Ministry of Tourism, 1993):

- Ministry of Culture and Tourism had the power for defining tourism regions, tourism areas and tourism centers in spatial sense, only to be approved by the Council of Ministers. Within these tourism regions, tourism areas and tourism centers, Ministry of Culture and Tourism had the power over ministries such as Finance (who hold land that belongs to state), Forestry etc. for assigning such areas for development of facilities. Ministry of Culture and Tourism stated to prepare 1/1000 scaled implementation plans in tourism regions/ areas/ centers according to the 1/5.000 scaled plans prepared by ministry of Reconstruction and Resettlement.
- In order to provide flexibility and increase capital investments, 2634 brought that public and private sector investments were designed to be made in tourism areas- zones where resources were more intensified.
- Ministry of Tourism gained increased functions and authority of coordinating some of the public sector investments like land use plans, allocation of state owned land etc in tourism areas and zones.
- Formalities and requirements for allocation of state owned property (Forestry and Treasury) were well defined, simplified and given to

Ministry of Tourism at priority areas to reduce the number of involved departments. Investors dealt with a single entity in accordance with the conditions and procedures already announced.

- The law gives higher significance to tourism investments and problems affecting them. More specific issues concerning land use plans and use of state owned property were thoroughly handed. In accordance with these, tourism investments increased rapidly and concentrated along the Aegean and Mediterranean coasts, where almost 80 % of Turkey's bed capacity exists (Küce, 2001:3).

The Fifth Five Year Development Plan was put into action for the years 1985-1989 (T.C. Başbakanlık Devlet Planlama Teşkilatı, Beşinci Beş Yıllık Kalkınma Planı). With this plan, the focal points were determined as it was important to create a real tourism consciousness, to form a public institution, which has the authority about policy making, planning etc. in tourism, to determine the places where to invest and distribute funds, to set the duties of public and private sector, for tourism investors to gain financial support from state, to train personnel employing in tourism sector.

The interventions of the state would be reduced and Tourism Bank would not directly make superstructure investments but would give credits to investors.

The focus would be on mass tourism again, however Turkey's potential in historical, archeological, and cultural assets; winter, water sports, festivals, health and youth tourism would also be utilized with protecting ecologic balance, health and hygiene of the environment. While developing tourism health, hygiene and beauty of environment were also important. Therefore it was important no to change the balance of nature.

After those acceptances, the studies were made on following issues:

- State would continue to undertake the infrastructure upgrading,
- Tourism investors would be supported with credit opportunities,
- Coastal areas would be promoted for investments,
- Historical assets would be restored to serve in tourism sector,
- Holiday camps operated by public authority would serve for domestic tourism.

With the Fifth Five Year Development plan, the targets were stated as:

- Tourism revenues were expected to reach 540 million\$
- Total number of visitors was planned to reach 3 million people and
- Licensed bed capacity was expected to reach 100.000 beds.

Fifth Five Year Development Plan had relatively more concrete attempts when compared to previous Five Year Development Plans. Beyond the decisions taken with those plans, the Fifth one stated the numeric targets and made it easy to compare the realization of the targets.

In this period, the economic, social and legal features of tourism sector and high incentives, planning and infrastructure investments have led an authorized, specialized organization. Therefore Ministry of Culture and Tourism re-separated and Ministry of Tourism was established to focus on tourism affairs in 1989. Despite the frequent changes, tourism departments have shown a steady upgrading from a section in a Ministry to a Ministry for its own (Tarhan, 1997).

Meanwhile, increased population growth and urbanization was taking already existing coastal infrastructure to upper limits and additional infrastructure was needed to improve the coastal region to accommodate

greater number of visitors. Besides Ministry of Tourism has realized that the full development of its considerable tourism potential depends on modern infrastructure meeting international standards (Araç, 2001). Therefore, in 1989, the Ministry of Tourism launched the ATAK project (Southwest Coast Environmental Project) to provide environmental protection along Aegean and Mediterranean coastlines and to determine the deficiencies in infrastructure system. Southwest Coast Environmental Project has covered a 2000-kilometer of Aegean and Mediterranean coastline. The main objectives of the project covered a wide range of issues such as planning, designing and construction of water supply and sewerage systems; wastewater treatment and disposal facilities; solid waste-disposal facilities; and pollution control studies including institutional requirements, financial and administrative studies. (Küce, 2001; Araç, 2001).

When the first period of development of organized tourism movements in Turkey examined, the main characteristics of tourism policy could be outlined as (Tarhan, 1997:65):

- State would continue to license tourism facilities, determine the standards and regulate the price control,
- Tourism investments were desired to concentrate on priority areas, by motivating private ventures with effective use of state owned land and other incentives,
- Legal and bureaucratic obstacles preventing the development and diversification of the tourism industry were tried to be reduced to accelerate increases at the capacity and variety of tourism supply,
- State would handle with the provision of more holiday opportunities for the citizens and had taken effective measures to increase the social tourism possibilities for middle and low-income people aimed,

but not much could have been achieved, apart from building a camping site at Kemer in Antalya by the Tourism Bank.

- Mixed economic model was adopted to continue, where superstructure investments and operations would be expected from private sector and government would support and motivate private ventures with effective incentives and assistances, in order to lead the investments and operations towards to the requirements of international demand.

The incentives provided for the development of the tourism sector were mainly (Küce, 2001:5; Nohutçu, 2002:238):

- Allocation of public land to investors for tourism investments on a long term basis,
- Availability of funds from the Fund for Development of Tourism,
- Availability of loans extended by Turkish Development Bank,
- Permission to foreign personnel up to 20% of total work force,
- Discounts on water, electricity and gas prices,
- Priority in allocations of telephone, fax and telex lines,
- Corporate Tax exemption i.e. customs, export taxes etc.

Sufficient funds for effective incentive practices have been provided and subsequently impressive capacity increases have been recorded. Annual capacity increase at accommodation facilities were reached to record levels, making Turkey the fastest growing tourism industry among OECD countries, from 66.000 beds in 1983 to 192.000 at the end of 1991. Between these years tourism revenues raised ten times and number of arrivals increased 4 times (Küce, 2001:1).

This period has continued to cover mass tourism developments. Although the authorities were aware of sustainable growth of tourism sector, the creation of bed capacity still continued to meet only international demand. Indeed the investors were encouraged by certain incentives. On the other hand there were the attempts to recognize that investments necessitate infrastructure establishments. Thus organized infrastructure investments were carried out. With the transition to liberal economic period, this era has witnessed great increase in total amount of tourist arrivals and accordingly the establishments of hotel beds. Government interventions were still dominant, but private sector was fully encouraged to establish tourism investments. However due to the scarcity of in economic funds in the following period the attitude of government towards direct intervention in tourism has changed.

4.3.2. THE PERIOD BETWEEN 1990-2001

With the beginning of 90's, tourism policies had faced certain changes, which were (Tarhan, 1997: 66):

- Public sector participation was reduced and pilot and sample investment policy was abandoned and tourism investments operations of public sector were stopped. Existing ventures, state owned tourism facilities (TURBAN) were decided to be privatized.
- Government interferences on prices of private tourism operations were stopped. Operations were allowed to determine their prices themselves, and also to use their choice of currency unit for their prices. It was the beginning for wider use of foreign currency prices

In order to ease the excessive pressure on coastal areas, incentives for tourism investments at Aegean and Mediterranean coasts were stopped (TURSAB) and also were minimized at Capadocia, Istanbul etc, but high rate of investments were maintained for Black Sea coast, east and southeast regions of Turkey. This encouragement model expected to divert the private sector tourism investments to these regions. In order to increase the tourism demand to northeast and southeast regions, kinds of tourism operations, suitable for these regions were promoted and supported by incentives. Diversification of tourism activities campaign, concentrated on rafting, trekking, high plateau tourism, skiing as alternative tourism to conventional kinds. The change at incentive policy was claimed to be a part of the economic policy to reduce the difference at the level of development among regions. But investments could not be directed to these regions but caused to sharp decline of tourism investments at the regions where most of the domestic and international demand were placed (Tarhan, 1997; Küce, 2001).

In this period tourism sector lost its acceleration due to the Gulf war, increasing terrorist activities and the earthquake happened in 1999. Regarding these, tourism sector in Turkey have led the crisis management. The outcome of these events was not optimistic; the fall of demand due to those events resulted with considerable price reductions. Consequently the quality of tourist arrivals and economic benefits of international tourism decreased (Tarhan, 1997). When compared to previous years the increase in the number of tourist arrivals and tourism revenues were very low, although number of tourist arrivals increased 0.5 times, and tourism revenues increased 2.5 times.

The Sixth Five Year Development Plan was put into practice for the years 1990-1994 (T.C. Başbakanlık Devlet Planlama Teşkilatı. Altıncı Beş Yıllık Kalkınma Planı). The main policies and precautions of the plan were:

- Protection and preservation of natural beauties and cultural assets would be given priority; certain areas would be opened to tourism activity under control and the utilization of such areas in tourism would be provided.
- Precautions would be taken to extend the activity season and raise the quality in tourism establishment, environment, tourist destinations etc.
- Stand by policies would be determined to make the winter, water sports, festivals, health, youth, yacht, congress, thermal, golf and 3rd aged tourism more attractive.

With the Sixth Five Year Development plan, the targets were stated as:

- Tourism revenues were expected to reach 4.488 million\$
- Total number of visitors was planned to reach 7.4 million people and
- Licensed bed capacity was expected to reach more than 350.000 beds.

The Seventh Five Year Development Plan was prepared after a one year transition program in 1995, and was put into action for the years 1996-2000 (T.C. Başbakanlık Devlet Planlama Teşkilatı. Yedinci Beş Yıllık Kalkınma Planı). The current situation was stated as follows:

- In 1989 licensed bed capacity was 146.0000
- Number of foreign visitor was 4.5 million people.
- Tourism revenues were 2.6 billion \$
- In 1994 licensed bed capacity was 314.000
- Number of foreign visitor was 6.7 million people.
- Tourism revenues were 4.3 billion \$.

These statistics showed that, the targets of Fifth Five Year Development Plan were realized; on the contrary Sixth Five Year Development plan was failed to catch the desired situation. Additionally although serious developments occurred with the Sixth Five Year Development Plan there were still lacking issues i.e. inadequate bed capacity, technical infrastructure, promotion and marketing, tourism education, transportation, travel agencies etc. when compared to countries in Mediterranean Region.

The main policies and precautions of the seventh Five Year Development Plan were:

- Efficient use of superstructures would be provided
- According to the changes in consumer preferences, the activities i.e. golf, winter sports mountain sports, high plateau, thermal, health, yacht, cruiser, congress tourism and entertainment activities would be developed and new destinations serving for those activities would be created.
- To provide better infrastructure, the needed regulations would be undertaken to implement and foster ATAK project.

With the Seventh Five Year Development plan, the targets were stated as:

- Tourism revenues in the year of 2000 would be expected to reach 8.5-11.9 billion\$,
- Total number of visitors would be expected to reach 13-17 million people and
- Licensed bed capacity would reach more than 1.3 million beds.

Among the important events of this period, First Supreme National Council on Tourism was held in 20-22 October 1998 (T.C. Turizm Bakanlığı, 1998). The importance of that meeting was that, it was the first organized conference regarding the debates on the problems of tourism sector. The

participants of this meeting were varied from representatives of the tourism sector, academic staff of the universities to members of civil societies and employees of the Ministry of Tourism. The general aim was to discuss the lacking issues and determine the policies for the future. As though the organization had a wide range of participant, the decisions taken were thought to be the ones on which the consensus had been provided.

The decisions of the First Supreme National Council on Tourism were as follows (T.C. Turizm Bakanlığı, 1998: 161):

- With the pioneer of Ministry of Tourism, a specialized bank should be established to encourage the investments, finance and management of the sector.
- Service sector should be developed according to the relations with Customs Union and European Union.
- In order to develop tourism demand qualitatively and quantitatively, comprehensive promotion studies should be held.
- There should be a macro plan for the institutions of tourism education, which would lead the use of similar programs.
- There should be specialization in sector of professional tourist guides, to utilize them in diversification of tourism activities.
- For the protection of the environment and provision of safety of tourists at coast, Tourism Security Units should be established.
- The investments regarding the cruise tourism would be supported.
- Incentives should be provided for the promotion activates of private sector in market development and accordingly necessary regulations should be made on the Law numbered 2634.
- Necessary agreements should be made for private sector to establish qualified health tourism facilities, contain cure parks, qualified accommodation units, rehabilitation centers etc.

- To maintain healthy development of tourism physical infrastructure should be rehabilitated, accordingly ATAK project should be fostered.
- Yacht and cruise tourism should be supported.
- Religious tourism should be utilized, and the celebration ceremonies of the birth of Jesus should be turned to account.

Contribution of tourism sector to national economy was with approximately 620.000 direct jobs in 2001 and when sub-sectors were counted this number increased to 1.500.000 employees. Additionally ministry of Tourism has declared that tourism sector has strongly related with 38 sub-sectors. Although the world tourism faced a crisis within the year 2001, Turkish tourism had a noticeable growth and international arrivals raised 12% and reached to 11.6 million foreign visitors.

TABLE: 8 TURKISH TOURISM STATISTICS OF YEAR 1980 and 2001

	YEARS		SHARES	
	1980	2001	1980	2001
TOTAL NUMBER OF TOURIST (WORLD)	285 Million	692.7 Million	100	100
TOURISM REVENUES (WORLD)	92 Billion US\$	465 Billion US\$	100	100
TOTAL NUMBER OF TOURIST (TURKEY)	1.2 Million	11.6 Million	0.42	1.67
TOURISM REVENUES (TURKEY)	400 million US\$	10.1 Billion US\$	0,43	2.17
Source: Ministry of Tourism, 2003				

The final development within this era was the preparation of The Eight Five Year Development Plan for the years 2001-2005 (T.C. Başbakanlık Devlet Planlama Teşkilatı. Sekizinci Beş Yıllık Kalkınma Planı). The current situation was stated as follows:

- In 1998 licensed bed capacity was over 1.000.000 beds
- Number of foreign visitor was 9.7 million people.
- Tourism revenues were 7.2 billion \$.

The decisions taken with this plan were:

- A reform was needed in promotion and marketing.
- A crisis management system in tourism for worse situations was needed.
- In order to diversify tourism to new destinations, to extend tourism season to whole year; golf, thermal, winter, mountain, health, yacht, congress and eco tourism activities would be promoted to regulate the seasonal and geographical distribution of tourism.

With the Eight Five Year Development plan, the targets were stated as:

- In the year 2005, total number of foreign visitor is expected to reach 13.6 million people.
- Tourism revenues are expected to reach 11.6 billion \$.
- Total bed capacity is expected to reach 1.2 million.

The Sixth, Seventh and the Eight Five Year Development Plans had the common policy of diversifying tourism activities and developing certain tourism types beyond sea-sand-sun based activities. But there was not any serious attempt, including First Supreme National Council on Tourism, until the Eight Five Year Development Plan. The decisions of Sixth and Seventh Five Year Development Plans could not be supported by relevant authorities; therefore the policies regarding the diversification of tourism were stayed as written.

Tourism sector in Turkey has mainly focused on mass tourism; therefore the investments especially within this period were merely placed in coastal

regions. The organized projects that initially took started in 1970s, have led huge investment attacks towards beaches. The outcome of such a progress unfortunately caused ad hoc coastal development which was separated from their hinterland. Moreover the general tendency of accommodation facilities of this 3S market has been towards all inclusive package holidays providing all kinds of activities within facility. This situation increased the differentiation between luxury beach hotels and the settlements behind them in economic and social terms. Especially local settlements could not benefit directly from coastal development; indeed in some cases they have lost the chance to access the coasts. Through such a development strategy, available treasury lands in coastal regions have been utilized in favor of mass tourism development.

When the tourist arrivals are examined, top ten visitors of Turkey can be ranked as follows:

TABLE 9: TOP TEN VISITORS OF TURKEY (YEAR 2003)

TOP TEN VISITORS OF TURKEY (YEAR 2003)			
RANKING	COUNTRY	TOTAL NUMBER OF TOURIST ARRIVED	%
1	Germany	3.332.451	23,45
2	Russian Federation	1.281.407	9,13
3	United Kingdom	1.091.404	7,78
4	Bulgaria	1.006.612	7,17
5	Netherlands	940.098	6,70
6	Iran	497.282	3,54
7	France	470.582	3,35
8	Greece	393.517	2,80
9	Austria	379.830	2,71
10	Belgium	308.118	2,20
Total Arrivals		14.029.558	100

Source: Ministry of Culture and Tourism Official Web Site

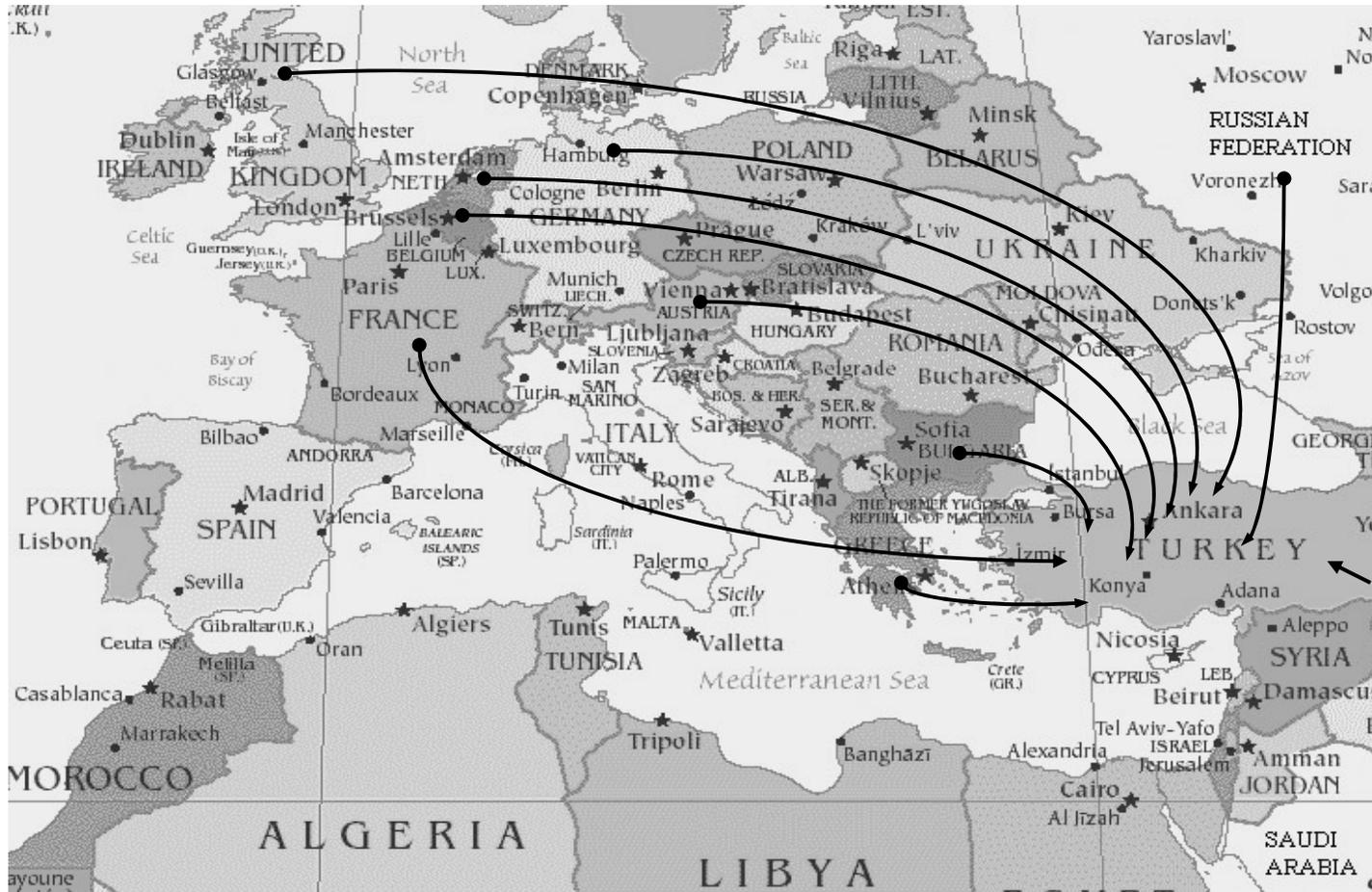
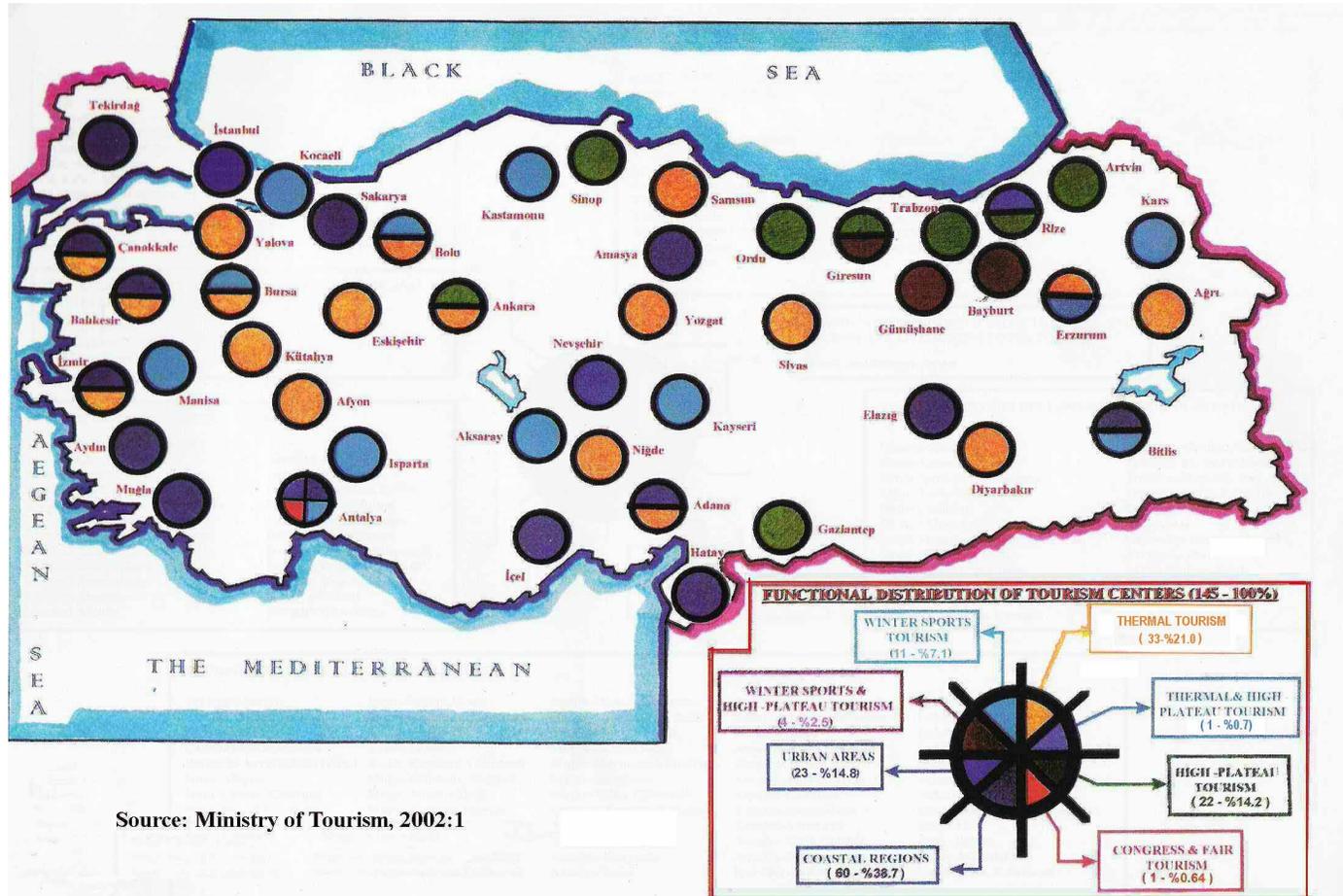


FIGURE: 1 TOP TEN VISITORS OF TURKEY IN 2003

When the monthly arrivals of tourists are analyzed, 75% of total number of international arrivals came to Turkey between May and October in 2003, pointing out the seasonality feature of Turkish tourist destinations. Additionally referring to the Figure 2 below, tourism centers declared in coastal regions have occupied 38.7% in functional distribution of all tourism centers. Within this frame, when these two features are overlapped, the outcome is that, great amount of tourists has been visiting coastal tourism centers of Turkey, which have relatively small percentages. In other words Turkey has more than 3S, but it has not been utilized yet. On the other hand, currently southern coasts of Turkey have not got suitable treasury lands for further allocation, meaning that if Turkey continues to insist on mass tourism development, popular southern coasts will not meet the need of new tourism investments in spatial sense. In this point, with taking global trends into consideration, tourism policies in Turkey have started to be shifted beyond mass tourism towards alternative modes in the interior zones.

Additionally after the Eight Five Year Development Plan, the policies for the progress of tourism sector were strongly supported by the state, and necessary regulations were made. In other words, the Eight Five Year Development Plan and the following important events were the significant issues to define the change in the tourism vision of Turkey, the start of New Era in tourism sector.



Source: Ministry of Tourism, 2002:1

FIGURE: 2 TOURSIM POTENTIAL REGARDING TOURISM CENTERS DECLARED BY MoCT

CHAPTER V

NEW ERA IN TOURISM:

THE CHANGE IN THE TOURISM VISION OF TURKEY:

World Tourism Organization predicts that, 21st century will face the rapid development in technology and automation, which will lead the replacement of man power with machines and cause the shortened work time and the rise in leisure time. Additionally living standards of the individuals and the income levels, especially disposable income, which can be allocated for travel are expected to rise, while transportation costs are expected to fall due to the improved transportation infrastructure and those will cause the rise of participants in tourism activities. The expectancies in tourism sector are (Küce, 2001:2):

- Tourism demand will continue to increase qualitatively and quantitatively and will vary
- Long-haul travel will progress faster than short-haul travel and lead the development of Asia Pacific and Asian Countries.
- Mass tourism will lose its current domination.
- Tourism sector will serve for consumer satisfaction and service quality.
- There will be the rise of awareness in eco-tourism activities.
- Instead of group tours, individual travels will rise.
- The demand for congress and incentive tourism will increase.

Under the light of those tendencies, Ministry of Tourism has set its tourism policies and vision to reach the desired place in world tourism market with reference to three basic programs:

- The Eight Five Year Development Plan
- Second High National Council On Tourism
- The Urgent Action Plan of the Government

In fact, with Sixth and Seventh Five Year Development Plans, State Planning Organization was stressing on the diversification of tourism activities to new destinations, prolongation of tourism season to whole year by developing golf tourism, thermal and health tourism, winter tourism, mountain, yacht, congress, eco tourism activities etc. Despite its obligatory function, the focal points of such development plans could not be put into action.

After two years than the preparation of the Eight Five Year Development Plan, Second Supreme National Council On Tourism was held by Ministry of Tourism in 12-14 April 2002. These two programs were overlapping and the decisions and the method of their implementation were very similar.

Second Supreme National Council On Tourism was the declaration of the “Second Attack in Tourism Development” and the slogan of the meeting was “Tourism is our future” (T.C. Turizm Bakanlığı, 2002).

Decisions taken within the Second Supreme National Council On Tourism were (T.C. Turizm Bakanlığı, 2002):

- With reference to world tourism perspectives showing the diversification of tourism facilities, alternative tourism activities i.e.

congress tourism, thermal tourism, yacht and cruiser tourism, religious tourism, high plateau tourism, winter tourism, golf tourism, rafting, trekking, hobby gardens, camping, holiday villages, entertainment center, safari, botany parks would be developed besides Sea-Sun-Sand type of activity. The aim is four season- 12 months tourism.

- Besides 3S (Sea-Sun-Sand) type of activity, 3E (Entertainment, Education, Environment) would be encouraged.
- Developing sport activities would be encouraged, esp. Formula 1
- Historical and cultural identity of Turkey should be used as a trademark; especially İstanbul should be developed as a trademark.
- In order to strengthen the authority in tourism planning, Ministry of Culture, Ministry of Environment and Ministry of Tourism should be united, which would lead the harmony in further developments.
- Tourism legislation should be reevaluated and required regulations should be made.
- Tourism investments in East and Southeast Anatolia should be supported.
- The tourism vision for the year 2020 was declared as 60 million visitors, 50 billion\$ revenues. To reach that targets, every year 450 million \$ should be used in tourism, 100 million \$ of which in infrastructure, 100 million 4 of which in promotion activities and 250 million \$ in incentives and support.
- Bed capacity of tourism destinations would be increased.
- Planning authority in tourism regions, tourism areas and tourism settlements should be Ministry of Tourism.
- Infrastructure systems of tourism regions would be upgraded,
- Transportation network would be upgraded.
- At least a 4-Star Hotel should be established in every district.

Authorities are highly concerned with seasonal character of tourism demand and have tried to find effective measures to extend the season by spreading the demand through the year. The needs to extend the season affected promotional strategies as promotional strategies are designed in a way to increase the demand on lower season (Tarhan, 1997). The government of Turkey realizes that success in tourism is measured not just in revenues, but in environmentally sound policies, which will sustain tourism into the future (Küce, 2001) and therefore there starts to be a great attempt to increase the diversity of tourism products and support certain by-products, which can be used during the low seasons, like high plateau tourism, mountaineering, spelunking (cave exploration), trekking, bird watching, bicycling, hot springs and spas, river rafting, winter sports , cruising and yachting, golf tourism, 3rd age tourism and incentive tourism by preparing seminar, conference and convention activities.

Through diversifying tourism and spreading it throughout the country and throughout the whole year, it is aimed to utilize natural and cultural values that exist in all regions of Turkey and to integrate them with tourism, also meet the changing and developing demands and trends of consumers. Main goals are (Küce, 2001: 7):

- To attract higher income groups and thus to increase the tourism revenues per tourist,
- To create demand throughout the year,
- To facilitate a balanced distribution of demand among regions, products and facilities.

After the Second High National Council On Tourism, following step was the Urgent Action Plan of the government, which was prepared to guide the organizational, long-term and consistent planning. The aim of plan

especially for tourism sector was to improve the investment conditions, to fasten the decision making process of the public and make believe the employees to a well-defined program. In Urgent Action Plan, related to tourism sector following were stated:

- Turkey's tourism potential would be utilized and important activities of world tourism market would be developed, which were business, fair and congress tourism, sports and culture tourism. With such a leap forward it was aimed to reach the conditions of mass tourism.
- Tourism Development Regions with special status would put into practice and in this respect necessary regulations would be made for foreigners to buy real estates.

Following progress was the remerge of Ministries of Culture and Tourism by Law numbered 4848 in 2003. By this, tourism sector in Turkey has become to set the policies and vision according to the developments in Turkey and changing trends globally. Now main issues in Turkey's tourism agenda are (Ministry of Culture and Tourism, 2004):

- Competitiveness
- Customer Satisfaction
- Sustainable Tourism Planning
- Keeping up with recent global tourism trends
- Destination based planning and marketing
- Environmentally friendly projects
- Planning which will give way to land development
- Projects involving more participation of private investors
- Promotion projects which will create new tourism products as a trade mark

Total number of tourist arrivals in 2003 was 14 million and tourism revenues were 13 billion USD, meaning that the targets of Eight Five Year Development Plan for the year 2005 has already met in the year 2003. Additionally World Travel and Tourism Council estimated that Turkey would be the fastest growing country in tourism demands with 10.2 % annual growth rate in the next 10 years (Ministry of Culture an Tourism, 2004).

To maintain this vision the following progress was the amendment of Tourism Encouragement Law (No: 2634) by Law numbered 4957/2634 and enactment of the regulations related to this law.

The purpose of the new Law is to ensure that necessary arrangements are made and necessary measures are taken for the regulation and development of the tourism sector and for giving this sector a dynamic structure and mode of operation (Official Gazette, 1982). Major changes bought with the new Law can be stated as follows (Official Gazette, 2003):

- With law numbered 4957/2634, tourism regions and tourism areas are taken out of circulation and instead of them Culture and Tourism Preservation and Development Regions are defined, which are the regions having a high potential for tourism development, and intensive historical and cultural importance, that are to be evaluated for the purpose of preservation, utilization, sectoral development and planned improvement. The boundaries of those regions are determined and declared by the Council of Ministers upon the proposal of the Ministry of Culture and Tourism.
- Additionally tourism centers were redefined as the parts or places specified to be developed on a priority basis within or outside the

Cultural and Tourism Preservation and Development Regions. These centers are important for tourism movements and activities, locations, sites and the boundaries of which are determined and announced by the Council of Ministers upon the proposal of the Ministry.

- The most important feature of this Law is that within the Cultural and Tourism Preservation and Development Regions and Tourism Centers, The Ministry of Culture and Tourism is authorized to make or to get made, to modify and to approve the plans of all scales, which constitutes the Ministry as the unique authority in planning process.
- Other issue related to preparation of those plans is that, in order to provide the base for infrastructure and planning process of the Cultural and Tourism Preservation and Development Regions and Tourism Centers, public institutions and organizations have to present the information, documents and comments requested from them within a period of 3 months. The related works and transactions shall be realized by the Ministry if the requested information, documents and comments are not submitted following the expiry of this period.
- The third feature regarding the plans is that in the Cultural and Tourism Preservation and Development Regions and in Tourism Centers; the sales, allocations, leases, operations related to border announcements and their modification which will be carried out by other public institutions and organizations and the structural projects which create environmental effects, are subject to the approval of the Ministry in advance.

- Other important issue is that, the Ministry is authorized to allocate the whole of the Cultural and Tourism Protection and Development Region, or sub-region defined by plans or one or more of their plots can be allocated by the Ministry of Culture and Tourism to real and legal entities of Turkish and foreign nationality in accordance with the purpose of the plan. The allocation of the whole region or the sub-region to a main investor will be put in force after the decision of the Council of Ministers and pre-permission will be given to this investor by the Ministry of Culture and Tourism. In case of approval of the project of the investor by the Ministry, followed by the arrangement of the investment license, the Ministry turns the pre-permission into the final permission.

With this new land development model it is aimed (Ministry of Culture and Tourism, 2004):

- To implement diversified, balanced, sustainable and environmentally friendly planning and projects,
- To create an environment in which Turkey will embrace international chains and trademarks
- To promote private sector this will ease economic burden on the state.

Such a contemporary land allocation model will lead the allocation of government owned lands, in accordance with regional planning concept, which will help to develop tourism. Moreover investments will be at once and in one hand as well as to with an integrated manner.

The Law numbered 4957/2634 brings destination oriented planning and management, in which planning authority (the state), and private investors

will be brought together in a new management concept in which role of the state will be minimized and creativeness of the private sector will be maximized. Moreover as defined in the law, Ministry of Culture and Tourism being the only planning authority, will contribute to fastening of the process (Ministry of Culture and Tourism, 2003).

Finally, Ministry of Culture and Tourism has defined Tourism Development Region (TDR), which was first declared in Urgent Action Plan of Turkish Government. The main objective of the TDR project is to integrate, organize and manage different types of tourism activities in a predefined area i.e. Culture and Tourism Preservation and Development Regions. TDRs will be planned to allow optimum land use among various tourism activities such as golf courses, marinas, accommodation facilities, meeting & exhibition centers, vacation houses, shopping centers, health, wellness and education facilities in one region.

Two major elements of the TDR project are:

- TDRs are expected to have large amounts of public land planned for tourism investments. Due to this planning different types of tourism activities mentioned above will be zoned and sub-zoned for potential investors. In other words TDR project area can be planned as sub-zones, which will be shaped by scheduling, finance, organization, and management models that the potential investors will propose.
- Zones and sub-zones created by the master plan will then be subject to public land allocation to a main Investor. Additionally the state has the right to allocate the specified forest and public land (treasury) reserved for tourism in TDRs to the potential main investor, who may then put together various sub-investors or

contractors and sub-lease the project to these private investors. Main investor in this sense will be the prime character that will carry out the legal and administrative roles, which the state has been handling for many years.

Physical plans of all scales and developments of all types of tourism activities in TDRs can either be produced by the Ministry of Culture and Tourism or can be produced by private experts and the final approval will be done by the Ministry of Culture and Tourism.

So far The Ministry has started the planning of four TDR projects in different regions of the country for realization of alternative modes of tourism. These are (Ministry of Culture and Tourism, 2004):

- Aydın Didim Tourism Development Region
- Muğla Dalaman Tourism Development Region
- Northern Antalya (Kepez-Varsak- Topallı) Tourism Development Region
- Antalya Manavgat Oymapınar Tourism Development Region

5.1. AYDIN DIDIM TOURISM DEVELOPMENT REGION

Project area is located in Aegean Region and in the provincial border of Aydın. Most of the land is publicly owned and has a surface area of 12000 hectare, with a 30 km coastline in length. Activities planned in Aydın Didim Tourism Development Region are:

- Business centers
- Yacht & marine tourism
- Sports tourism

- Eco-tourism
- Theme parks
- Golf tourism
- Culture tourism
- Congress, festival & exhibition tourism
- Youth tourism

Among those activities, the focus will be on culture tourism and yacht and marine tourism. Regarding the cultural aspect, the Temple of Apollon being the current cultural and historical asset of the area will be stressed and will constitute the cultural base of the project. Additionally, Didim TDR project is considered as the marine city, to attract the yacht potential of Mediterranean Region and to capture a larger share of international yacht traffic (Araç, 2001). Within this concept, the aim is not only to build a harbor for yachts, but also to build a special place and associated services for the maintenance and repair of them during the whole year. From this point of view, Didim TDR has two major aspects, which are culture tourism and yacht and marine tourism.

5.2. MUĞLA DALAMAN TOURISM DEVELOPMENT REGION

Project area is located in the Mediterranean Region and in the provincial border of Muğla and district of Dalaman. Most of the land is public and private ownership is also available. Land has a surface area of 30.000 hectares. Activities planned in Muğla Dalaman Tourism Development Region are:

- Yacht & marine tourism
- Agro Tourism
- Health & thermal tourism

- Water sports
- Eco-tourism
- Nature parks
- Golf tourism
- Youth tourism

Dalaman TDR project has the basic aim to develop health and thermal tourism to benefit from the climatic conditions of the settlement. To meet the need for a qualified thermal complex, Dalaman TDR is supported as the wellness city, including cure parks, thalassotherapy centers, beauty and health facilities, hot water treatment units, rehabilitation centers etc. Thermal tourism operates year round, with most clients spending between two to three weeks at a spa (Araç, 2001). Similar to thermal resorts in Europe, thermal activity is strengthened with golf tourism as both of which have the aim to attract 3rd age tourist.

5.3. NORTHERN ANTALYA (KEPEZ- VARSAK- TOPALLI) TOURISM DEVELOPMENT REGION

Project area is located in the Mediterranean Region and in the north of Antalya and covers the land of Kepez, Varsak, Topallı Settlements. Most of the land is forest area and some amount of private land is placed. Land has a surface area of 35.000 hectares. Activities planned in Northern Antalya Tourism Development Region are:

- Motor Sports
- Film studios
- Theme parks
- Golf tourism
- Retail Centers

- Sport Camping Centers
- University and Educational Opportunities

Northern Antalya TDR focuses on theme parks, regarding the view that tourism starts with entertainment. As the TDR project covers the potential urban development areas of the city of Antalya, the activities will serve to the inhabitants of the city, as well. The aim is to constitute the theme city supported by integrated activities i.e. motor sports, movie platforms, retail centers etc. The other important factor within Antalya Theme City is the educational opportunities originated from 3E (Entertainment, Education, Environment) based tourism activities.

5.4 ANTALYA MANAVGAT OYMAPINAR TOURISM DEVELOPMENT REGION:

Project area is located in the Mediterranean Region and the provincial borders of Antalya and around the town Oymapınar that is placed in the district of Manavgat. Land has a surface area of 50.000 hectares. Activities planned in Antalya Manavgat Oymapınar Tourism Development Region are:

- Golf tourism
- Eco tourism
- Sports & recreational tourism activities
- Holiday villages
- Water sports
- Theme Parks
- International institution for the natural and ecological research
- Youth Tourism
- Nature Parks

With Oymapınar TDR golf tourism determined to be the major activity. With golf tourism the aim is to attract professional golfers in Mediterranean Region by suggesting mild climate, available topography and high handicapped golf courses for year round. Regarding the opinion “Where people play, they soon want to live” (INV Golf Industry, 2003) Oymapınar TDR is preparing to serve for temporary and permanent golfers while fostering local settlements in socio-economic terms. Additionally Oymapınar TDR has the nature-based activities as complementary features, to constitute Oymapınar Green World City. Certain research centers for the examination of flora and fauna of the region, multi-purposed sport activities containing adrenalin sports as mountaineering, climbing, parasailing; water sports i.e. rafting, canoeing etc are also supported within this project.

When the studies of Ministry of Culture and Tourism are examined, it is obvious that there is a noticeable effort to realize the diversification policy in tourism activities and prolongation of them to whole year and four TDR projects are seemed to be the case studies of that policy. While selecting those alternative activities, comprehensive studies have been carried out from the suitability of such activities to selected region to socio-economic features of the regions.

The common activities of TDR projects are sport tourism and especially golf tourism. These facilities are being used globally to extend tourist season to year round. Additionally with those TDR projects eco tourism activities are being proposed. The objective is to integrate local residence with tourism activities, to provide the rise of local revenues gathered from tourism and the socio-economic development of region.

TABLE 10: COMPARISON OF ALTERNATIVE TOURISM ACTIVITIES IN TOURISM DEVELOPMENT REGIONS

ALTERNATIVE TOURISM ACTIVITIES	TOURISM DEVELOPMENT REGIONS			
	AYDIN -DIDIM	MUĞLA- DALAMAN	NORTHERN ANTALYA	MANAVGAT-OYMAPINAR
Agro Tourism		✓		
Business- Shopping Centers	✓		✓	
Congress, Festival and Exhibition Tourism	✓			
Culture Tourism	✓			
Eco-Tourism	✓	✓		✓
Film Studios			✓	
Golf Tourism	✓	✓	✓	✓
Health and Thermal Tourism		✓		
International Institutions for Natural and Ecological Researches				✓
Motor Sports			✓	
Nature Parks		✓		✓
Sports Tourism	✓	✓	✓	✓
Theme Parks	✓		✓	✓
University and Educational Opportunities			✓	
Yacht and Marine Tourism	✓	✓		
Youth Tourism	✓	✓		✓

Source: Compiled by the author depending on MoCT's studies.

The other common feature of TDR projects is that, they have coastal tourism centers adjacent to project boundary and those tourism centers have been attracting great amount of tourists. As TDR projects are the first examples of realizing alternative modes with a comprehensive approach, the idea behind this is, to benefit from current 3S potential and to attract the user. The locations that do not have 3S potential will immediately follow those 4 TDR projects when they reach success.

The major idea behind TDRs is creating a complex tourism settlement including all sectors like housing, health, education, commerce, industry etc. by the means of tourism sector. In other words, tourism will be the dominant sector, which will lead the others. The hidden aim of TDRs is the permanent settlement of foreign visitors especially the third age group. The idea is that, Europe is becoming older, and they are searching peaceful and comfortable places to live, on the other hand Turkey is seeking employment opportunities as Turkey has a relatively young population. Then it is reasonable that, European people will come and invest, which will in turn raise the job opportunities of Turkey

The novelties including the amendment of Tourism Encouragement Law by Law numbered 4957/2634; defining Culture and Tourism Preservation and Development Regions and Tourism Development Regions are the results of the attempts to place Turkish Tourism to a more contemporary stage. Therefore the first step was the determination of the responsible institution as Ministry of Culture and Tourism in every aspect, especially planning procedures. With such an organized and integrated manner, it is foreseen to place Turkish Tourism in the position of most revenue generating country among Mediterranean tourist destinations.

CHAPTER 6

CONCLUSION

Tourism, being a widely accepted service industry, has been continuously contributing to nations' economy until the post war period with its currency generating feature.

The development of tourism sector had hardly started after the Second World War due to the war time regulations, i.e. travel restrictions and obstructions concerning health and safety, which had affected tourism sector negatively. With 1950's most of the West European countries started to increase their interest in international tourism and began to promote their tourism industries as they have become aware of its revenue generating impact. Such an increase in international tourism was referred to the initialization of mass tourism, which has started with the postwar period and reached until the present time.

In 60's and early 70's, governments had concerned with the problems and developments of tourism supply to increase economic impacts and the studies were made to increase bed capacity, to utilize new beach resorts, to provide new opportunities in mass tourism development etc. As though the focus was on the supply side of the tourism industry, there have not been any attempts to protect the tourism resources, despite the considerable developments at popular tourist destinations like Spain, France, and Italy etc.

Until 1980's mass development had faced its best times and most of the tourist destinations had utilized their coastlines for sea-sand-sun type of

activity. But after that period such mass movements and the demand for sun-sea-sand type of tourism began to show noticeable signs of weaknesses as popular tourist destinations serving for mass tourism were facing environmental and quality problems due to the high population movement, overuse of carrying capacity, destruction of natural environment during the peak seasons. Moreover the developments on the Mediterranean costal region could not be considered as optimal use of natural resources, whereas unplanned developments caused unrecoverable damages on the coastlines of Mediterranean Region, because of uncoordinated and unplanned developments.

Due to the rise of environmental problems and the concerns related to natural resources, the focus and actions of the governments towards tourism activities have shifted to environmental protection, consumer satisfaction and protection and safety-well being of the people from economic benefits of tourism, which was the change of priorities in government actions on behalf of the protection of natural tourism resources by planned and coordinated developments.

Besides the environmental concerns, the target group of sea-sun-sand activities was in the position to search for more varied products than traditional sun-sea-sand type of summer activities, i.e. taking excursions to authentic and mystical places, wondering traditional lifestyles of local communities, healthy and preserved natural environments etc.

Moreover the analysis of World Tourism Organization for the prospect of year 2020 showed that while Europe would remain as the world's largest tourist receiving region, it would inevitably loose some parts of its market shares. Europe would continue to grow with the lowest percentage among other regions, in other words overall shares of arrivals to the European Region was expected to decrease within the period of 1995-2020 and

Europe's growth rate was foreseen to be 3% where the highest levels of growth were expected to be in Middle East, East Asia and The Pacific, and South Asia; which are 7.1%, 6.5% and 6.2% respectively.

As more destinations seek to develop a tourism attraction base, uniqueness becomes even more important. Replicating what exists in the market or in other destinations does not offer anything new to the tourist, but uniqueness entices people to visit. The forecasted changes in preferences of tourists lead the rise of East Asia and the Pacific, where major attractions are uniqueness and authenticity.

Regarding those changes in the tourism industry, the policies have shifted from focusing merely on beach holidays to the spreading of tourism activities into interior zones of coastal destinations with the aim of diversification of tourism activities and propelling relatively less developed regions in socio-economic terms, while reducing the difference of prosperity among regions. With such a development model, problems created by the seasonality of tourism industry would be handled and the attempts to increase the demand in low seasons would be searched, both of which would lead the control of high population movement and the over use of carrying capacity and in turn protection of environmental resources.

The common objectives of offering varied destinations and activities are:

- Diversifying tourist activities
- Extending tourist season,
- Lengthening the stay periods of the tourists,
- Attracting more qualified and higher spending tourists,
- The optimum usage of infrastructure and carrying capacity,
- Preservation of natural environment,

- Contribution to the socio-economic development of newly emerged tourist destinations (Lawton and Weaver, 2001; WTO, 1999)

Likewise Europe, Turkish tourism has adopted mass tourism development as the basic tourism policy, while existing patterns in Turkey were defined by cultural interest rather than mass tourism motivations (Tarhan, 1997). Major objective of this policy was to increase the international tourism earnings under the pressure of constant and critical deficit at balance of payments.

Within this development scenario, Turkey has entered planned development era with the 1961 Constitution and State Planning Organization (SPO) was established as the government body responsible for the preparation of five year development plans, the first of which has initiated in 1963.

The development plan sets out, national goals, objectives, and targets. It has been a development policy defining macro economic policies and document also containing strategies, tools and investment programs on a macro level and analyzed each sector separately with their specific objectives, principles and responsibilities. The plan has been a legal document; imperative for government while its interference in the private sector has been limited to guidance and encouragement.

Five year development plans concerning tourism sub-sector has initially set the policy of establishing maximum amount of accommodation facilities where possible in order to meet the minimum need. It was followed by the decision of investing in the places having high tourist potential for the mass tourism in order to reduce investment and infrastructure costs. Meanwhile state would undertake the infrastructure investments and pilot

superstructure investments and private sector would carry out other superstructure investments, which would be supported by certain financial and legal measures while fitting to physical land use plans. South Antalya Development Project, being the most comprehensive project, was the result of that policy to initiate resort development projects infrastructure of which was undertaken by government.

1980's faced noticeable development in the tourism industry due to the economic and financial reforms as import substitution and protectionist policies were abolished and free market economy, liberalization, privatization, convertibility policies were adopted (Tarhan, 1997). Such developments were integrated with legislative improvements to ongoing physical planning and infrastructure. Additionally, the most significant growth of tourism sector occurred after the enactment of the Tourism Encouragement Law numbered 2634 in 1982, which established incentives that attracted considerable domestic and foreign investments.

Problems reducing tourism investments and causing insufficient increase of tourism super structure capacity, tried to be solved by the Law numbered 2634. This Law was designed to increase and to improve tourism supply. Heavy bureaucratic formalities and other limiting factors on tourism investments and diversification of tourism products were tried to be reduced.

Tourism Encouragement Law also introduced new incentives including government land allocations to private tourism investors, and gave more authority to Ministry of Tourism for the declaration of tourism regions/areas/centers for preparing land use plans of them.

The basic concept of the Tourism Encouragement Law was, to build up a new modern tourist industry, more specifically on accommodation industry

and tourist facilities. The law set out certain standards through relevant regulations for those enterprises that might wish to enjoy certain incentives and encouragement measures introduced by law.

Since 1980's in line with investments on infra and super structure and rapid increase in the number of tourist beds, Turkey has constituted a considerable development attack in tourism, whereas air transport has been another area of achievements. Charter restrictions on certain routes were lifted contributing to rapid increase of tourists, flocking in mass numbers to Turkey.

All these positive developments coincided to rise of favorable conditions for Turkey in the major tourist generating markets of Europe where tour operators were in search of new destinations. These conditions with new products on offer have brought Turkey to a stage of take off (TURSAB).

Turkey adopted encouragement of mass tourism policy in view of the staggering increase of demand in this segment of the market towards the Mediterranean destinations, rather than evaluating what else Turkey could offer to the market; in other words without sound comparable cost-benefit analysis on macro level for development alternatives. Besides authorities and experts in Turkey were well aware of dangers caused by the pressure of demand on resource utilization. Contrary to some other countries that suffered from saturation, improper development seriously damaging environment and many valuable natural assets as well as existing human settlements, Turkey was prepared to a certain extent to sustain the balance between utilization and conservation.

Physical plans for the priority areas were ready in hand to control and ensure proper development to avoid the dangers experienced on some other Mediterranean coasts.

With 90's, government policy of tourism aimed to shift the tourism superstructures to less developed north, east, southeast regions of the country by promoting certain tourist activities like rafting, trekking, high plateau tourism expected to be more suitable for these regions and by stopping incentives for the tourism investments at other regions. Nevertheless tourism investments could not be shifted to these regions and policy objective could not be achieved even at a minimum scale, as a result of this the investment trend at tourism sector has highly reduced all over Turkey.

Next period in five year development plans were letting private sector carry out all the tasks regarding tourism investments and minimizing public sector interventions due to the lack of funds. Since 90's overall tendency has been that, governments has started to reduce their participation in tourism activities leaving more space for private sector at profit making activities, but increase their function at planning, coordinating and promotion, in addition to the protection of environment, consumer and people's safety. In compliance with this theory consideration was given to sustaining both natural and man made values, to ensure proper development. In order to ease the excessive pressure on coastal areas and distribute the activities throughout the country, diversification policies have been adopted. It has been an alternative solution not only to insure sustainability, but also contributing to balanced economic development which enables different parts of the country to benefit from the positive socio-economic impact of tourism. Thus Turkey has started to encourage diversification.

In compliance with this policy, the following progress was the amendment of Tourism Encouragement Law (No: 2634) by Law numbered 4957/2634 and enactment of the regulations related to this law. The purpose of the

new Law is to ensure that necessary arrangements are made and necessary measures are taken for the regulation and development of the tourism sector and for giving this sector a dynamic structure and mode of operation (Official Gazette, 1982). The Law numbered 4957/2634 brings destination oriented planning and management, in which planning authority (the state), and private investors will be brought together in a new management concept in which role of the state will be minimized and creativeness of the private sector will be maximized. Moreover as defined in the law, Ministry of Culture and Tourism being the only planning authority, will contribute to fastening of the process.

Regarding the developments in the world tourism and changing trends, Ministry of Culture and Tourism has defined the concept of Tourism Development Region (TDR) which will be planned to allow optimum land use among various tourism activities such as golf courses, marinas, accommodation facilities, meeting & exhibition centers, vacation houses, shopping centers, health, wellness and education facilities in one region.

When the studies in Turkish Tourism are examined, it is obvious that there is a noticeable effort to realize the diversification policy in tourism activities and prolongation of them to whole year as it has been realized that if Turkey continues to serve merely for mass tourism, she can neither develop more than current situation, nor compete with popular tourist destinations of Mediterranean Region, but stays as it is. The novelties including the amendment of Tourism Encouragement Law by Law numbered 4957/2634; defining Culture and Tourism Preservation and Development Regions and Tourism Development Regions are the results of the attempts to place Turkish Tourism to a more contemporary stage. Meanwhile those efforts to develop alternative tourism activities do not mean the creation of rival activities to sea-sun-sand based tourism, but they are the rise of tourism diversification with the support of current

potential in coastal tourism as a complementary activity. Under the light of these, alternative types have been defined and potential areas have been determined to realize those policies. With this organized and integrated manner, it is foreseen to place Turkish Tourism in the position of most revenue generating country among Mediterranean tourist destinations.

To conclude, the diversification policy of Turkish Tourism will eventually promote the Turkish tourist destinations and raise the attractions of them. Turkey may also attract high spending, qualified tourists for twelve months. The activities promoted in the interior zones of coastal regions may reach success and eventually be copied to other zones of the country where do not have 3S potential. Besides Turkey may compete with the top three countries of Mediterranean Region (France, Spain and Italy) and even may pass them in international tourist arrivals and tourism revenues. But the point is that, the tendencies towards seeking unusual and searching for activities those are unique for the selected tourist destination, will inevitably affect the mature tourist destinations, whereas will support the rise of East Asia and Pacific, as they have mostly been promoting cultural themes. Therefore, developing tourism alternatives and extending tourism season to year round can only be a good starting point. But the following step should be to focus on cultural, historical, traditional identity and unique assets of Turkey in order to sustain it's ranking in the international tourism market.

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