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## Europeans travel behaviour in Istanbul and Turkey

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# EUROPEANS TRAVEL BEHAVIOUR IN ISTANBUL AND TURKEY

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## Abstract

The trends and developments in the tourism industry show that the touristic activities are among the most significant economic and social facts of the 20th century. The Europe preserves its stake in the developing tourism sector of the world. The countries of the European Union do have a position in the lead as far as the international tourist circulation is concerned, in the form of primary resource and major destination. The citizens of the European Union also represent a considerable market for the countries seeking to have a place on the global tourism markets. Most of the international visitors to Turkey are from European Union, who also represents a significant potential for Turkish tourism. This study examines the holiday making ratios, profiles, demands and behaviours of the European Union travellers and gives an analysis and assessment of such considerable potential. Turkey is a special location in the world with regard to its cultural inheritance while Istanbul is its major city in relation with international connections. Istanbul's significant role in history with its dynamic geographical position and its traditional architecture and the civilizations hosted by the city would well cause Istanbul's being worthy of a share its deserves from the global tourism market and the tourism functions, that is considered to be most efficient tool in marketing Istanbul, has a significance in the city's position and future. Istanbul has various urban spaces in the form of touristic products. For providing the development in relation with certain strategies of tourism planning, the demands and preferences of the travellers to Istanbul should be determined. Analysing the visitors from that point of view has a considerable importance for the potential visitors of the city while planned development shall provide the opportunity to obtain the guiding data. In the light of these data, determining the planning strategies for Istanbul and developing the recommendations that could be used for a tourism plan for sustainable tourism supported by tourism policies in both public and private sectors and planners are very significant. This study focuses on the visitors from European Union and evaluates their trends and behaviours while making deductions from the potentials they own. The study gives the holiday periods of the Europeans, their length of stay in the destinations, the number of persons attending travels, the destinations they prefer, the transportation modes they use, travel organizations as well as the problems they face, and in that parallelity the characteristics of the European Union citizens visiting Turkey and Istanbul were analysed with comparisons. In conclusion, the general vacation trends and behaviours of the European Union citizens and their relations with the experiences they face in Turkey is very considerable with the current and potential evaluations in the European market which in fact is very important for Turkey.

## INTRODUCTION

The increase of the number of the international passengers from 25 million people in 1950 to 657 million in 1999 is a significant data for the development of the tourism sector besides the progress on the touristic activities (WTO, 2000). Within the same period, the income from the tourism sector in the global scale increased at an average annual rate of 12% excluded the transportation expenditures and it indicates that a great development occurred especially within the second half of the century (Kongar and Berksoy, 2001).

While tourism was an activity that was preferred by the high income class before 1950, the number of people who has both time and money for leisure activities was few, amount of the people who try to go on holiday increased rapidly from 1950s to the 1980s and this resulted from the addition of the organizations made for the elite for the other people and within the time the term called mass tourism has formed (Borg, 1991). When we look the tourism development process within the world, mass tourism was deemed as the commencement.

In 1970s, in which tourism has reached mass dimensions, Turkey could not achieve the expected increase within the tourism sector. While the share of Turkey from the global tourism income was 2% in 1970, this rate was 4% within Europe and the share of tourism within the gross national product was only 0,5% (Göymen, 1993).

In 1980s a decrease on the global development was observed due to the economical crisis (Borg,1991). 1980s is a period in which the liberalization was started and the capital sources have been shifted to the high profit sectors and at the same time tourism investments were encouraged by means of the law for tourism encouragement. The performance of Turkey on the basis of the number of the tourists and the tourism income between 1981 and 1990 was above the world average. At he beginning of 1980s Turkey has entered a new economical period and started to apply free market economy. The international tourism activities that loss their dynamics during the economical recession periods, started to increase after 1983 when the crisis is over and it was a significant factor for the developments in the tourism sector. In addition to this, the rapid urbanization in Spain, Italy and other such countries for which there is a great tourism demand and the deformation of the environmental quality had a positive effect on Turkey that was in its early stage of the tourism development.

Although there is a great increase both on the number of the tourists and the revenue from the tourism sector especially after 1980 and Turkey has a great potential among the EU member countries, the comparison between Turkey and other Mediterranean countries having the similar characteristics shows that that increase has not reached sufficient levels yet.

The increased global mobility and expanded holiday budgets have also caused an increase on the number of the destinations. Globalization of the tourist market has been fed by the exploration of the new regions that do not have the same characteristics of the countries that produce traditional tourism. The European Union still maintained its leading position in world tourism as a main source and a main destination of international tourist flows. Europeans are an important market for the countries that desire to have a dominant share from the global tourism market.

The international visitors coming to Turkey are mostly originated from Europe and there is a significant interrelation. Among the top ten countries of Turkish tourism market, the European dominance can be seen when we exclude the USA, the UIS and Japan. When we consider both the accommodation and staying, it can be seen that the UIS, the USA and Japan are expanding markets.

The Europeans, who form the majority of the international tourists visiting Turkey, are also a significant potential for and so important Turkish market. This study aims to explore the holidaymaking rate, profiles, demands and behaviors of the Europeans and make an analysis and evaluation of that significant potential. The relations between the holidaymaking trends of the Europeans and their experience in Turkey and Istanbul are extremely necessary for the current and potential evaluations of the European market that has a great importance for Turkey. ‘Determining Istanbul tourism strategies with respect to demand for urban tourism’ named PhD dissertation’s survey on characteristics and perceptions of international travelers visiting Istanbul based on the data about Europeans experience in Istanbul.

## **THE SHARE OF TURKEY AND ISTANBUL WITHIN THE WORLD TOURISM MARKET AND VISITORS PROFILE**

While Turkey has a unique place in the world due to its cultural heritage, Istanbul, which contains the richest part of this heritage, is the most significant city that links the country with the world. The existing potential of Turkey and Istanbul’s historical

background going beyond thousands of years and containing so many cultures has not obtained the desired share from the global tourism market and therefore the development of the tourism function that is deemed as the most suitable tool for the promotion of both Turkey and Istanbul in the world has a great importance.

The trends of the international visitors coming to Turkey have shown a rapidly increasing graph from the mid 1980s with smooth up and down inclinations. This increase can be summarized by the saturation of the Mediterranean destinations of Europe, demand for new destinations instead of the vacations based on sea-sun-sand, and the increase of the supply capacity as a result of the development of the infrastructure and other facilities for the tourism sector within Turkey after 1980s (TURSAB, 2002).

Table-1: World Top 15 Tourism Destinations and Turkey

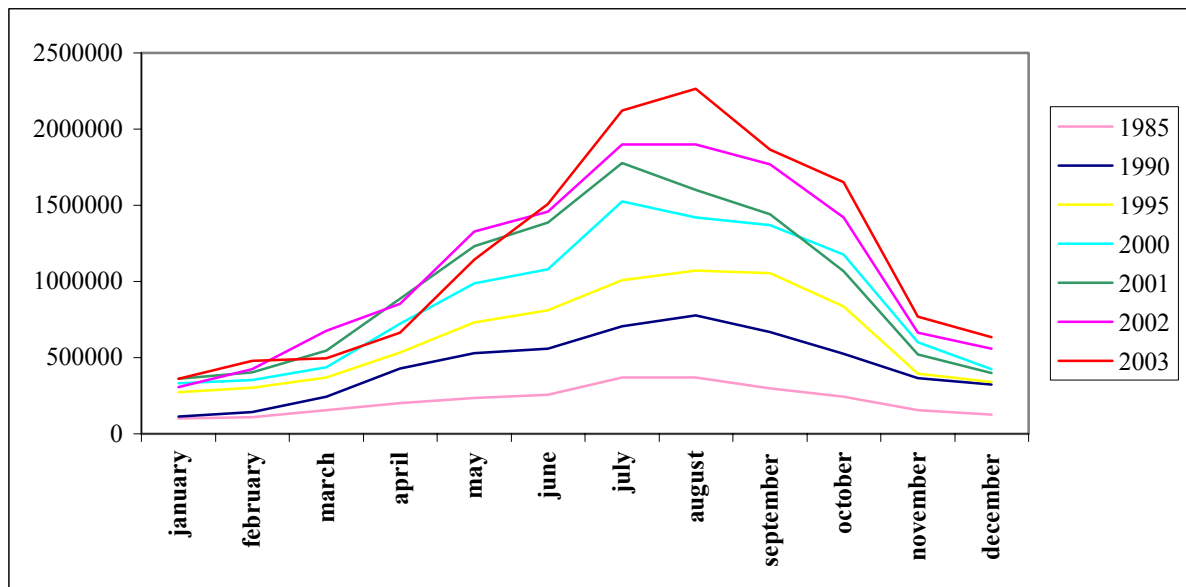
Rank	Destination	International tourist arrivals (million)				
		1990	1995	2000	2001	2003
1	France	52.5	60.0	75.6	75.6	85.6
2	Spain	34.1	34.9	47.9	49.5	57.5
3	United States	39.3	43.3	50.9	45.5	53.9
4	Italy	26.6	31.0	41.2	39.0	44.9
5	China	10.4	20.0	31.2	33.2	36.0
6	United Kingdom	18.1	23.5	25.2	23.4	26.5
7	Russian Federation	30.0	10.2	21.2	-	25.9
8	Mexico	17.1	20.2	20.6	19.8	19.2
9	Canada	15.2	16.9	19.7	19.7	22.3
10	Austria	19.1	17.1	18.0	18.2	18.2
11	Germany	17.0	14.8	19.0	17.9	20.6
12	Hungary	20.5	19.6	15.6	15.3	11.4
13	Poland	3.4	19.2	17.4	15.0	16.5
14	Hong Kong	6.5	10.2	13.1	13.7	12.8
15	Greece	8.8	10.1	13.1	-	14.2
-	<b>Turkey</b>	<b>5.4</b>	<b>7.7</b>	<b>10.4</b>	<b>11.6</b>	<b>13.9</b>

WTO-2002, SSI-1991, 1996, 2001, 2002, 2004

2/3 of Turkey's existing bed capacity is dominated on the coast regions for the sea-sun-sand tourism. As a result of this at the moment, 70% of tourism is realized at the coastal lines. The rate of accommodation facilities within Black Sea and Anatolian Regions has remained at 18% levels. While the number of the international tourists visiting Turkey was 1.228.060 people in 1980, in 2000 it has multiplied by 9. The tourism revenue increased from 326 million dollars to 7.636 million dollars for the same period. Tourism activities have a great importance for Turkey but when the other countries located in the Mediterranean basis make a comparison, the share of tourism is so little for the

employment. While this rate is 6,9% for Greece, 6% for Italy and 8% for Spain, it was only 3% for Turkey. Tourism revenues of Turkey had an average increase of 12,2% for the 1990-2000 period and doubled the global annual average. (II.Tourism Council, 2002).

Figure 1: Distribution of International visitors arriving in Turkey by years and months



SSI, 2003, 2004

Istanbul, the biggest city of Turkey on the basis of its population and the functions performed and subject to the most rapid and great change under the contemporary conditions, has a great potential to be an international city in parallel with the global trends.

In Istanbul, between 1990 and 2000 the number of tourists increased 110% and it is above the general increase rate of Turkey, which is 93% for the same period (TURSAB, 2002). The tourism industry, which is the most dynamic sector within the Turkish industry due to its current dimensions and the development trends, seeks to interfere new market segments by means of new products. As a result of these efforts Istanbul was established as the most significant source of Turkish tourism industry. Istanbul has a perfect geographical location, cultural and natural resources for tourism. On contrary its share from the international tourism market is only at 0,35% levels (TURSAB, 2002).

The share of the international tourist arrivals of Istanbul within the total international tourist arrivals of Turkey has been decreasing during the years. The share of Istanbul in Turkish tourism market decreased from 26% to 22% for the 1995-2001 period. While

the number of international visitors visiting Istanbul was increasing 25% for the said 6-year period, the number of international visitors visiting Turkey increased 50%. The number of international visitors visiting Antalya increased 117% in 1995-2001 periods. While the share of Antalya was 25% in 1995, it reached to 36% in 2001. 90% of the international visitors coming by airlines in Istanbul. The number of visitors coming by seaway in 2001 was only 210 thousand. It is a well known fact that 10 million international tourists sail within the Mediterranean basin every year. Germans take the first place among the international visitors visiting Istanbul. The Americans are the second, and the Russians are the third. While the tourists originated from the Middle and Northern America prefer the Aegean and Mediterranean costs instead of Istanbul, those coming from the Southern Europe, Northern America and Japan mostly visit Istanbul for historical and cultural tourism purposes. For example according to the statistics for 2000 12% of the Germans and Dutch, 11% of the Belgians and Australians, 16% of the English tourists visiting Turkey also visit Istanbul. On the other hand 50% of the Americans and Italians, 47% of Canadians, 62% of the Portuguese, 71% of the Spanish and the Japanese visiting Turkey also visit Istanbul. It is obvious that the marketing activities for the promotion of Istanbul in Middle and Northern Europe are not sufficient. While 80% of the tourists visiting Istanbul stay at the hotels holding a certificate from the Ministry the other 20% prefer those certified by the Municipality. The average stay of the international tourists in Istanbul is 2,5 days. On the other hand this figure is about 7 days for Antalya and Southern Aegean region. (TYD, 2002).

Table-2: Distribution of International visitors arriving in Istanbul by years and months-the share of Istanbul in the Turkish tourism market

Months	1990	1995	1997	2000	2001	2002	2003
January	45009	119902	135299	104224	139162	124917	86929
February	51080	134849	136559	124367	150847	144572	188536
March	81467	157820	204769	151551	201156	193198	177244
April	102368	178422	194766	195546	238003	216317	196010
May	113529	190595	231701	200591	241860	226114	253159
June	107556	184042	206676	215529	250901	213366	294726
July	139284	177057	236063	326910	288288	277669	378087
August	136913	182359	248013	244309	278046	276047	381051
September	124287	197523	268051	250192	236975	277916	331383
October	99214	188628	254860	248247	194006	315972	353209
November	64697	153045	210751	196002	160656	214386	222255
December	56527	143142	175220	163073	137239	225374	209600
<b>Total</b>	<b>1121931</b>	<b>2007384</b>	<b>2502728</b>	<b>2420541</b>	<b>2517139</b>	<b>2705848</b>	<b>3076978</b>
<b>Market share of Istanbul (%)</b>	<b>20,8</b>	<b>26</b>	<b>25,83</b>	<b>23,21</b>	<b>21,66</b>	<b>20,41</b>	<b>22,04</b>

SSI- Ministry of Tourism, 1991,1996,1998,2001,2002,2003,2004

Table-3: Distribution of International visitors arriving in Istanbul by Nationality

Nationality	1990	2001	2002
EU countries	-	1036959	1126753
Europe (OECD)	-	1115625	1220227
<b>Total OECD</b>	<b>899883</b>	<b>1488258</b>	<b>1533896</b>
UIS	-	454020	549777
Yugoslavia	-	41479	39591
<b>Total Eastern Europe</b>	<b>74336</b>	<b>555800</b>	<b>651862</b>
<b>Total Africa</b>	<b>19878</b>	<b>144940</b>	<b>151567</b>
<b>Total Asia</b>	<b>109427</b>	<b>299362</b>	<b>346131</b>
<b>Total America</b>	<b>6617</b>	<b>21086</b>	<b>15395</b>
<b>Other</b>	<b>11790</b>	<b>7693</b>	<b>6997</b>
<b>Total</b>	<b>1121931</b>	<b>2517139</b>	<b>2705848</b>

SSI-Ministry of Tourism, 1991,2002,2003

Table-4: Distribution of International visitors arriving in Turkey by Nationality

NATIONALITY	1985	1990	1995	2000	2001	2002	2003
EU	1041709	2734640	3797034	5551056	6647572	7708451	7730886
EUROPE OECD	1221998	3331519	4001017	5907730	7106852	8213132	8208969
TOTAL OECD	1490809	3663427	4464222	6681384	7803686	8719600	8666871
UIS	11711	223211	1356735	1383110	1430039	1661079	2071598
YUGOSLAVIA	366473	325703	70034	285930	287833	367321	370861
TOTAL EASTERN EUROPE	413341	1014600	2022249	2422962	2538708	3153789	3745805
TOTAL AFRICA	101778	89924	135816	167829	179553	185582	174211
TOTAL WESTERN ASIA	217931	289104	620562	622187	613275	619800	726647
TOTAL SOUTHERN ASIA	373766	301718	431617	480022	428766	540404	603637
TOTAL ASIA	591697	590822	1052179	1102209	1042041	1160204	1330284
TOTAL SOUTHERN AMERICA	14102	20760	35628	34318	32804	21951	23876
TOTAL AMERICA	16123	26868	43233	42043	43311	25834	26954
<b>TOTAL</b>	<b>2614924</b>	<b>5389308</b>	<b>7726886</b>	<b>10428153</b>	<b>11618969</b>	<b>13256028</b>	<b>13958045</b>

SSI, 2003, 2004

It is known that the share of Istanbul, which has a great importance for Turkish tourism industry, from international tourism and the total number of the visitors is too low. As it was already stated on several reports issued by several institutions working for the tourism sector, there is a decrease on the number of the international tourist arrivals in Istanbul when Turkey compares it in general. While the share of Istanbul from the international tourism market was 0,35%, its share in Mediterranean based hosting 10 million tourists every year was 2%.

It is known that majority of the international visitors visiting Turkey and Istanbul is the Europeans. According to research carried on 1997 and 2000, it is seen that the European travelers usually prefer to visit another EU country for their holiday. On the other hand,



in 2000 there was a great increase on the number of the visitors visiting the non-EU member countries when compared to 1997.

## **EUROPEANS TRAVEL BEHAVIOR**

It is very important for all the countries to know the travel trends of the Europeans and promote their Europe market. While one of two Europeans go on holiday in 1997 (53%), 70% of the citizens of the northern countries, especially, the Scandinavians and the Dutch went on holiday and preferred the Southern countries. About three thirds of the Portuguese went on holiday abroad. There are no differences between genders of the travelers, but age, education, income and occupation do play an important role on going on holiday. 59% of the European travelers are in 25-39 age group and 56% is in 40-54 age group. While the younger group forms 55%, older group forms 45%. In 1997 majority of the European travelers had a university degree or were students but there is an increase on the number of the lower income groups going on holiday abroad. In 1997 the Europeans said they go on holiday in a year several times and 33% said twice a year, 11% three times and 3% four times a year. Most of the Europeans prefer August for their holiday but the other summer months also take a great share. While the rate of going on holiday in June is 14% for EU, this figure is 20% for the English. The others are as follows: 43% of the Belgians in July, 36% in August; 48% of the Danes in July and 20% in August; 27% of the Irish is in July and 23% is in August; 38% of the Dutch in July and 28% in August; 46% of the Finns in July and 24% in August, 55% of the Swedes in July and 20% in August. While the travelers from Germany, Holland and Denmark go on holiday in May above the EU average, the French go on holiday in July and August above the EU average. The income levels of the European travelers are related with the months preferred for holidays. While the high income group prefers the first 4 months more, they go on holiday in January at 4%, in February at 7%, in March 8%, in April 10%, in July 32%, in August 41%, in October, November, December 10%, 4%, and 9% respectively. 36% of the European travelers go on holiday for more than two weeks, 21% for two weeks and 19% for one week. While the majority of the European travelers go on holiday with their partners, 10% travels alone. The rate of women in this group is 11% and the men are 9%. Most of the travelers prefers to travel alone are over 55 years old, retired or from lower income groups. In 1997, while 63% of the Europeans choose the sea, 25% mountain, 25% city and 23% countryside

destinations. Those who prefer the sea destinations form 80% of the Greece and 30% of the Finns. Age and gender has no effect for the preference of such destinations. On the other hand it is obvious that the travelers over 55 years prefer this type less than the others. Lower income groups and the retired travelers prefer this type less than the others. The German travelers mostly prefer the mountain destinations. While the old and retired travelers prefer this type most, housewives and managers follow them. The Scandinavians and Irish travelers prefer the city destinations most. On the other hand the Greece, the German and the Italians prefer this type the least. The young group prefers the city destinations the most. While the 58% of the European travelers use their own cars to reach their holiday destination, 31% use the plane and the 10% use the train. On the spot their privileged means of transport are still their own cars, but then followed by walk and tourist coach. The French (74%), the Italian (63%) and the Spanish (61%) use their own cars in proportions significantly higher than the EU average (58%). While the Swedes, the British, the Irish, the Danes and the Austrians make above average (16%) use of charter flights. The Irish the Luxembourgian and British make above average use of scheduled flights. Cars are means of transport used mainly by the middle range age categories (25-39 and 40-54), tourist coaches by the eldest (55+). Hotels and the holiday clubs is the most preferred accommodation type by the European travelers with a rate of 42%. The other possibilities, such as to stay in one's own family (16%), on a campsite (14%), in rented flat (13%) come next. Staying in hotels or holiday clubs is more favored by the Austrian, Luxembourgers, Belgian, German and Italians. In terms of socio demographic characteristics, the older travelers, the more likely he is to have chosen this predominant option. To stay in a hotel or holiday club seems to be more attractive to those who have completed the longer studies, to the highest income brackets, to the self employed, to the retired, to the managers and other employed (European Commission, Directorate General XXII, 1998).

While the Europeans' rates of holidaymaking were changing from country to country in 2000, 31,2% of the Portuguese and 76,9% of the German traveled and the frequency of trips also varies according to the country of origin of the travelers. The average number of travels was 3,1 for the Swedes; this figure is 2 for the Finns and British. While the domestic tourism is dominant in Greece, Spain, Italy, Portugal, Finland, Sweden and England, international tourism is dominant in Belgium, Denmark, Germany, Ireland, Luxembourg, Holland and Austria. 25-44 age groups travel the most and the 45-64 age

group follows it. This is a result of the economic situation and the number of the people within these groups. While the majority of the European travelers go on holiday in August or July, minority prefers November. More than half of the travels to Denmark, Ireland, Austria, Finland, Sweden and England were for 4-7 days. In 2000 private or hired vehicles were the most used transportation vehicles by the European travelers. Air transport is popular with British and Luxemburger travelers. For the French rail travel is important. Most of the European travelers are in the 25-44 age group. The Italian forms the highest rate for going on holiday. 35% of the Finns and Swedes are in 45-64 age group. The number of travelers in 15-24 ages is more than 65 and over group. On the other hand the British travelers in the 65 or over age group are more than 15-24 age group (European Communities, eurostat,2002).

Table-5: Top destinations by originating member state -1997

Country of origin	Only stays of more than 4 nights (%)	Another EU countries (%)	A country outside Europe (%)
Belgium	France %24	74	13
Denmark	France %10	59	9
Germany	Spain %17	73	9
Greece	Germany %2	8	1
Spain	France %2	10	4
France	Spain %7	22	8
Ireland	Spain %19	58	14
Italy	France %8	25	5
Luxembourg	France %23	91	10
Holland	France %20	67	9
Austria	Italy %19	65	14
Portugal	Spain %9	19	2
Finland	Spain %8	32	6
Sweden	Spain %12	53	8
England	Spain %18	52	16
<b>EU 15</b>	<b>France %19</b>	<b>44</b>	<b>9</b>

EU Commission Report, 1998

As it can be seen from Table 5 in 1997, the biggest share belongs to France and Spain. The basic factor here not only the location (distance, accessibility), but also the climate, cost of travel, cost of accommodation and etc. are the basic factors effecting the preferences of travelers (figure 2), (European Commission, Directorate General XXII, 1998).

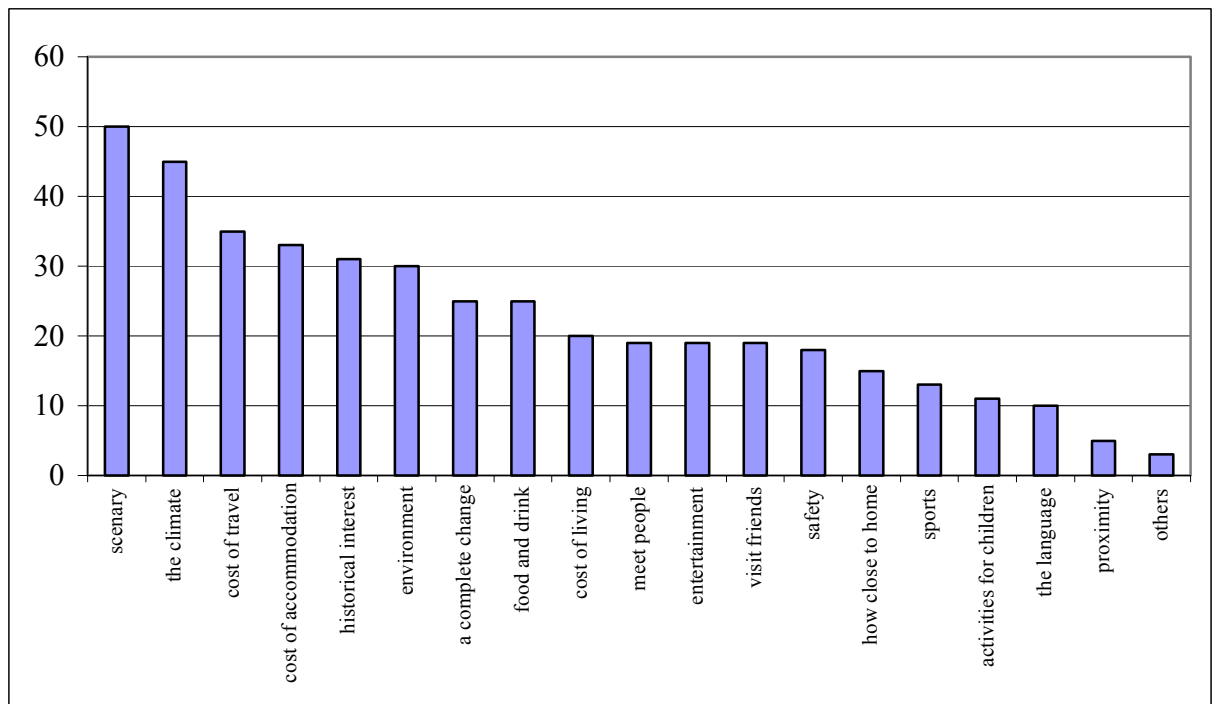
Table-6: Holidaymaking rate and breakdown of trips by destination-2000

Country of origin	Departure rate (%)	Domestic (%)	Outbound of which in the EU (%)	Outbound of which outside the EU (%)
Belgium	40.2	17.9	73.9	26.1
Denmark	59.3	30.9	68.2	31.8
Germany	76.9	34.9	66.2	33.8
Greece	56	95.5	43.4	56.6
Spain	37.3	89.7	59.4	40.6
France	-	-	-	-
Ireland	-	39.9	79.4	20.6
Italy	46.3	77.2	55.3	44.7
Luxembourg	61.1	0.4	79.8	20.2
Holland	67.9	37	74.7	25.3
Austria	54	31.8	54	46
Portugal	31.2	82	74.2	25.8
Finland	51.9	71.4	61	39
Sweden	61.8	69.9	67.3	32.7
England	60.9	55	65.8	34.2

EU Commission Report, 2002

In 2000, most of the travelers from Greece, Spain, Italy, Portugal, Finland, Sweden and England prefer to spend their holiday in their own country and this rate reaches to 95% for the Greek and 90% for the Spanish (Table 6). On the other hand the travelers from the Belgium, Denmark, Germany, Ireland, Luxembourg, Holland and Austria prefer to go on holiday abroad. It is not surprising that the Europeans prefer the Mediterranean countries. When we consider the travel within the EU countries, Spain is the first choice for 20,1 % of the Belgian 29% of the German, 44,3% of the Irish, 23,5% of the Italian, 37% of the Fin. France is the first choice for the 44,7% of the Belgian, 19,3% of the Danish, 26,5% of the Italian, 24,9% of the Luxembourgian, 23,5% of the Dutch, 18,4% of the English (European Communities, eurostat,2002).

Figure 2: The Europeans criteria for choosing a destination (%)-1997



EU Commission Report, 1998

In 1997 while the effect of the scenery was 49% and the climate was 45% for the destination selections of the European travelers, the cost of travel was %35 and the cost of accommodation was %33 (figure 2). It is remarkable that in Ireland, only 2% choose the scenery as a key criterion for selecting a holiday destination. What travelers buy on the spot is mainly food products and local craft products as well as clothes. European holidaymakers tend to rely more on themselves (75%), or on other members of their families (33%) then on travel agencies (15%) to arrange their holidays. The younger (64%) tend to be less involved in the preparation of their holidays than the other age groups. The higher income group (21%) use travel agencies in higher proportions than the others. When we consider the problems encounter by the European travelers, general environmental problems of the destination country forms 9% and the environmental problems within the tourist places they visited 8%. While the young Europeans complains especially about the quality of the food, restaurants and the accommodation facilities, the tourists who are 55 or over do not complain about these but 7% complains about the transportation and 5% from the other services. While the students and young Europeans encounter the privacy and safety problems more, income level is an important factor on this subject. About 94% of the Europeans were pleased

with their holidays in 1997, the tourists who are 55 or over is the most satisfied group (European Commission, Directorate General XXII, 1998).

## **GENERAL PROFILES OF THE EUROPEANS VISITING TURKEY AND ISTANBUL**

There is an increase on the number of the European Tourists Visiting Turkey since 2000. In 2003, 16% of the international visitors visited Turkey in August, 15% in July, and 13% in September. While the majority of the visitors visiting Turkey were males and within the middle-income group, most of them preferred hotels, motels and pensions for accommodation.

Table-7: Income levels of international visitors arriving in Turkey by tourism seasons

Income Level	(%)							
	January February March		April May June		July August September		October November December	
	2002	2003	2002	2003	2002	2003	2002	2003
Low	14.7	16.1	10.7	13.2	11.9	12.1	12.7	14.3
Middle	70.6	70.3	75.5	73.7	75.2	74.1	73	71.7
High	14.7	13.5	13.8	13	12.9	13.7	14.3	14

SSI\*, 2002,2003,2004

Table-8: Accommodation of international visitors arriving in Turkey by tourism seasons

Accommodation Type	(%)							
	January February March		April May June		July August September		October November December	
	2002	2003	2002	2003	2002	2003	2002	2003
Hotel motel pension	52.6	53.6	71.8	73.8	70.7	77.3	67	64.7
Own houses	11	3.7	6.6	4.1	9.5	5.2	7	5.6
Rented flat	11.5	11.4	5.1	6.4	3.3	2.7	6.2	9.4
Own family houses	22.6	22.6	13.5	13.7	14.7	13.1	16.4	17
	2.3	8.7	3.1	2	1.8	1.7	3.3	3.2

SSI\*, 2002,2003,2004

Table-9: Types of expenditures made by international visitors in Turkey by tourism seasons

Type of expenditure	(%)							
	January February March		April May June		July August September		October November December	
	2002	2003	2002	2003	2002	2003	2002	2003
Foods and beverages	20.4	16.7	24.5	18.8	23.8	22.5	19	20.2
Accommodation	26.5	26.3	25.1	28.6	25.5	26.4	25.5	25.3
Transportation	7.1	5.8	5.7	5.9	5.8	5.7	6.4	6
Culture	2	2.6	2.7	2.9	3.3	3.3	2.4	1.7
Tour Services	0.9	1	2.4	2.1	2.3	2.6	1.9	1.8
Other (clothes, car renting communication tobacco, drinks newspaper, magazines, souvenirs and etc.)	42.3	46.2	38.7	40.5	38.4	38.4	43.6	43.4

SSI\*, 2002,2003,2004

Besides the data on the nationalities of the international travelers visiting Turkey, no cross-relational examination of demographic and travel behaviors of international travelers is existent in Turkish official tourism statistics database. Yet, the travel behaviors of the Europeans, who form the majority of the travelers visiting Turkey can still be predicted. It is seen that the general travel behaviors of the Europeans are also same for their travels within Turkey.

In order to follow the new developments tourism studies in Turkey should be in parallel with the world, both in content and scientific methodology. The support of the sector representatives for scientific tourism studies has great importance for the development of the Turkish tourism market. Together with the positive contribution of this scientific studies the instant change risks might be decreased and the policies might be updated. The importance of city destinations has increased with the efforts to ensure tourism variation in Turkey and with the new strategies to extend tourism season to the whole year. These developments increased the expectations of Turkish tourism from Istanbul substantially.

Table-10: The Share of Turkey and Istanbul within the Destination Selections of the Europeans-2000

Country of origin	Outbound of which outside the EU (%)	Arrivals in Turkey (%)	Visiting Istanbul (%)
Belgium	26.1	2	1.2
Denmark	31.8	0.9	0.5
Germany	33.8	21.8	11.5
Greece	56.6	2	1.3
Spain	40.6	0.9	2.8
France	-	4.3	6
Ireland	20.6	0.4	-
Italy	44.7	2	4.6
Luxembourg	20.2	0	-
Holland	25.3	4.2	2.2
Austria	46	3	1.5
Portugal	25.8	0.1	0.3
Finland	39	0.5	0.3
Sweden	32.7	1.4	0.9
England	34.2	9	6

EU Commission Report-2002, SSI 2000-2001

As it can be seen from Table 10, Turkey addresses only the Germans in the European market and only attracts them. Even though the European market has great importance for Turkey when we look at European travel rates out of EU countries it can be seen that Turkey has hardships attracting European travelers. Within travelers visiting Istanbul, Northern Europeans and Irish visitors are nearly non-existent. On the other hand the Greek, German and Italians prefer to visit the city destinations least among the EU travelers, but the German travelers visit Istanbul the most and the Italians visiting Istanbul is twice as much as all the Italians visiting Turkey. Furthermore it is seen that the Spanish and French has a greater interest for Istanbul than Turkey.

It is known that capacity disposal rates in Istanbul is 40% for the facilities establishment licensed by the Ministry of Tourism and 20-25% for the facilities establishment licensed by the Municipality (TURSAB, 2002). This capacity disposal rates shows that there is a need for both the production of new facilities and infrastructure and creation of new demand at the same priority. Therefore, the promotion, advertising and marketing activities should be given the same priority with the new investments. The average length of stay in Istanbul is 2.5 days. This length the same as the other global cities, planning urban tourism. According to several statistics and studies carried out in the world, five summer months are preferred for holidays the most. The rates of the people visiting cities for touristic purposes to the total number of the tourists are different according to the destination. While the peak tourism season is July, August and September for most of the cities, Istanbul and other such cities are visited most by the



visitors in July, August, September and October. The majority of the tourists visiting Istanbul are from the OECD countries. The rate of the Europeans is quite high among those. There is a great increase on the number of the Russian tourists within the last decade.

Table-11: Classification of International visitors visiting Istanbul by nationality

Group **	Summer season-2002				Spring season-2002				Winter season-2003				
	EU countries				EU countries				EU countries				
1.	1.	2.	3.	4.	1.	2.	3.		1.	2.	3.	4.	5.
	UK	Germany France	Italy	Spain Holland	Germany UK	Holland	France Northern Europe		UK Germany	Holland	France	Northern Europe	Other EU
2.	Far Eastern				Far Eastern				Far Eastern				
3.	USA-Canada-South America				Other Asian				Russian Federation and other Europe				
4.	Russian Federation and other Europe				Russian Federation and other Europe				USA-Canada-South America				
5.	Other Asian				USA-Canada-South America				Other Asian				
6.	Africa				Africa				Africa				

Kerimoglu, 2004

\*\*Groups are ranking from high rates to low

The number of the Europeans visiting Istanbul doesn't change by the tourism seasons and the travelers of these countries constitute the majority within the tourist profile. While the male/female rate is quite equal for the tourists from the EU countries in the summer season, this rate changes in favor of males in spring and winter. While most of the tourists coming in 2002 summer season were in 20-29 age group, 30-49 age group is dominant in the spring and winter season. There is an increase in 50-59 age group in the spring and winter seasons, and 60-70 age group preferred Istanbul in spring. While Europeans from low income do not visit Istanbul much, middle and upper-middle group tourists visit most. Europeans from high-income visited Istanbul most in spring. The public and private sector employees are the majority of the Europeans and the businessmen follow it (Kerimoglu, 2004 )

Table-12: Classification of International visitors visiting Istanbul by common demographic profiles

Summer season-2002	Spring season-2002	Winter season-2003
Male	Male	Male
Female		
20-29 ages	30-49 ages	40-49 ages
Middle income	Middle income	Upper middle income
Higher education (university)	Higher education (university)	Higher education (university)
Public and private sector workers	Public and private sector workers	Public and private sector workers

Kerimoglu, 2004

When the destination selection criteria of the Europeans is examined (figure 2), the highest share is given to the scenery, climate, the cost of travel and accommodation, historical interest, different culture, local cuisine. The potential offered by Turkey and Istanbul meets expectations of the European travelers. Rather insignificant ones among these criteria are safety, proximity, language and other such factors. Although these criterias are relatively insignificant, they can be regarded as negative aspects for Turkey and Istanbul. Yet, it should be noted that the situation is the same for other non-EU member countries and Turkey has the potential to overcome these negativities.

## **EVALUATION**

It is obvious that the general travel behaviors and preferences of Europeans visiting Turkey are also reflected in their visits to Turkey and the Middle and Northern Europeans prefer the Aegean and Mediterranean coasts in Turkey. Although German, Dutch, Danes, Belgian, Australian and British visitors sometimes visit Istanbul when they are on holiday in Turkey. Therefore the German, English and Dutch tourists form the majority of the tourists visiting Istanbul, it shows that these countries form the majority among the tourist profile. Although more than half of the Italian, Portuguese and Spanish tourists visit Istanbul when they are in Turkey, they are in a small minority among the tourists visiting Turkey and, this shows that their numbers are low within the tourist profile.

Another important point to be taken into consideration by the Turkish tourism to enable spread over twelve months is that among the Europeans the British prefer June most, Germans, Dutch and Danes prefer May for their holidays. Furthermore, the Germans, who have the largest share within the tourist profile prefer the mountain destinations most and it s a great opportunity for variety of Turkish tourism. Tourism companies play a significant role in shaping the tourism market. Several tourism packages and cities offered by them have a great role in shaping the market. More than half of the tourists coming from countries in the European Union in the spring of 2002 organized their travel to Istanbul through travel agencies. The travel agencies should inform the tourists by offering several tourism packages and also giving importance to the promotion of Istanbul, but it is obvious that the travel agencies are not successful in the promotion of Istanbul in the foreign markets. Because of Turkey's travel agents lack of ability to satisfy tourists needs, by only offering the same package deals with no alternatives also need to be taken in to account. Unless a needs analysis is conducting

by the travel agents for the tourists, and there is a change in their attitude, in regard to what tourists need, travel agencies will not to be able to work as independent institutions both in domestic and international organizations. (Kerimoglu, 2004). It is a must that the public sector supports them by conducting several planning and organizational activities. Performance of all the institutions in the direction of the determined policies is one of the most significant factors for a planned and successful development.

More than half of the tourists from the countries of European Union change their minds about Istanbul after they visit. The images visitors have of Turkey change in a positive manner after their visit (Kerimoglu, 2004). More care should be given to the marketing strategies prepared for EU markets. The images formed by visitors about a destination have a great importance for the future visits to that destination, tourism's success and potential tourists. Without doubt the image of Istanbul will be the most effective factor for the image of Turkey in the world. The negative political and economical conditions of Turkey and the prejudice about Turkey because of it being a Muslim country affect tourists in a negative way.

It is seen that the majority of Europeans visiting Turkey in the spring of 2002 had never been to Turkey before (Kerimoglu, 2004)). It was their first visit ever. Alternative packages should be offered to Europeans for the spring season. It is noted that Europeans visiting Turkey in winter had been to Istanbul several times but had not been to the other parts of Turkey (Kerimoglu, 2004). Most European travelers coming to Istanbul in this season are coming for business purposes and they are from high-income group but they do not like to come to Turkey for their holidays.

## **CONCLUSION**

When the existing sources are taken into consideration, tourism in Turkey has not developed as much as it should have done and it shows that the existing potential could not be used efficiently. Parallel to this, Turkey could not get the desired share from the global tourism market and therefore the economical revenue obtained from the sector is not at the expected levels. Determining the economical effects of tourism is not easy due to its effects on several different sectors, for that reason obtaining sufficient data for this subject is very difficult for Turkey as it is for many other countries in the world. Comprehensive and detailed statistics and analysis are required for a general understanding on the subject. Several studies have been made in order to determine the

economical effects of tourism within Turkey by the State Statistics Institute, Ministry of Tourism and Turkish Central Bank.

The preference, interest, expectations and satisfaction of the tourists are very important. Besides the historical and natural beauty of the destinations, the preferences of the tourists are also determined by the different local cuisine, amazing nightlife and entertainment facilities, different recreation and sports activities, shopping centers and the existence of art activities. Furthermore while a good local transportation system, safety, low travel and accommodation costs also satisfy the customers, insufficient transportation and car parks, traffic problems, deformed historical structures, un-renovated city centers and activities cause dissatisfaction. There are significant differences between the visitors satisfaction according to their characteristics; there are significant relations between the visitors and different variables. Major variables related to spatial activities affecting the visitors are length of stay, visit purposes and repeat visits. Demographic characteristics of the visitors and the travel variables do not have a significant role in the spatial activities of the visitors. This is explained by the demographic diversity in the tourism offering countries as a result of the increase in the number of tourist worldwide. While the income level of the visitors has an effect on their decision before visiting the destination or the tourism facilities such as the hotels and the restaurants, and their age is related only with the shopping and the tourism activities. The variables related to demographic profiles, cultural level, images of the destination, using guidebooks of visitors affect on the spatial activities depends on the different destinations. Ages and income levels of the visitors are more related to the travel types than the gender but there might be a significant relation between the gender and the entertainment expenditures (Kerimoglu, 2004).

It is known that among the city destinations in Turkey, only Istanbul is included within all countries tourism brochures together with 19 classical city destinations of the world. Actually, this shows that Istanbul has a very special position, which is known, all over the world. On the other hand the failure to benefit from the position of Istanbul at a sufficient level stems from the mistakes made in planning and marketing. The intensification of tourism brochures in foreign destinations in Belgium, Denmark, France, Holland, and Italy should be taken into consideration. German, Danish, English and Dutch tourists prefer more traditional and less known European cities and therefore this should be evaluated in favor of Turkey. The tourists from Belgium, Denmark,

Germany, Ireland, Luxembourg, Holland and Austria prefer foreign destinations more than other Europeans and the marketing activities should be programmed accordingly. It is known that some important touristic places in the world such as London are used as a gateway and stop off point for longer holidays. Like many other cities, Istanbul desires to hold a similar position. Nevertheless, the visits to the cities depend on the entertainment facilities within the areas surrounding the city, or the existence of an international airport and sometimes the existence of accommodation variations preferred by the visitors or the existence of similar facilities. In addition to long holidays, by means of developed air travel opportunities, short break holidays are possible for such cities, as Paris, London and Vienna and most tourists prefer the coastal or historical cities for this purpose. A sea or river coast might be a view for touristic products and this might be different according to the equipment and organization of the function. There are several examples for the use of the coastal areas in this manner. Although climate seems to be an important factor for developing urban tourism, it is a fact that there are several advantages of sunny cities (terraces with views, pedestrians etc.). Without doubt historical places are a base for the development of urban tourism. Due to its natural and historical resources and suitable climate conditions Istanbul has a big chance to combine several important characteristics. The cities that are in a significant position in the tourism sector should have an economical, political and cultural importance that carry them to a significant point in communication and travel within the global system, have a position to offer qualified services for the global market and be in the center of international level economical, social and political communication. The above-mentioned multi directional characteristics and touristic historical sources should exist in a touristic metropolis. While the international tourist visits for touristic cities, art galleries and concert contributions, visits to the well known historical structures are deemed as several determiners; access of international tourists by air, international congress halls, and chairmanship for international congresses, existence of international companies and other such factors are important contemporariness determiners and they create positive effects. In order to encourage the touristic visits to a city, there is a need to organize conferences, international fairs and other such activities. Therefore the cities that contain all these facilities are in a better position. The famous worldwide attractions of the city cause an historical development in these cities, and different cultural identity (spatial identity) also attracts tourists and increases the number of tourists visiting a city. Therefore in order to achieve an increase

in the number of tourists visiting a city depends on the variety and originality in these subjects.

The marketing strategies for Turkey should be designed to have the visitors stay in Istanbul even if it is for 2-3 days. In several cities in the world, similar arrangements that encourage the visits to go to cities are done by the support of the airline companies. This is very easy if the cities have the main transportation connections. Istanbul is the strongest international connection in Turkey, therefore such realization of a project for Istanbul should not be difficult.

The finding of the studies on this subject shows that the visitors have a tendency to visit the places that have not been seen by them yet or not seen very much, it is obvious that Istanbul has a great chance in this respect. It is known that the citizens of the Scandinavians and the Irish prefer city destinations most in the EU. The number of the tourists visiting Istanbul who have origins in Northern Europe and Ireland is so few. This should be taken into consideration while determining promotion and marketing strategies.

Although the European market has a great importance for Turkey, it is obvious that organizers are not successful in making travelers of the EU countries visit Turkey. When we examine the subject from a positive point of view, the existence of tourists in the EU who have never been to Turkey and Istanbul yet hold a great tourist potential. The efforts of Turkey in this direction should be accelerated and the opportunities should stem from the knowledge of the characteristics, demands and furthermore the expectations of these tourists should be evaluated.

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