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Conference Paper

Challenges In Tourism Development: Can Istanbul Survive Without A Master Plan?

53rd Congress of the European Regional Science Association: "Regional Integration: Europe, the Mediterranean and the World Economy", 27-31 August 2013, Palermo, Italy

Provided in Cooperation with:

European Regional Science Association (ERSA)

Suggested Citation: Kerimoglu, Ebru; Koramaz, Kerem; Yazgi, Burcin; Ertekin, Ozhan (2013): Challenges In Tourism Development: Can Istanbul Survive Without A Master Plan?, 53rd Congress of the European Regional Science Association: "Regional Integration: Europe, the Mediterranean and the World Economy", 27-31 August 2013, Palermo, Italy, European Regional Science Association (ERSA), Louvain-la-Neuve

This Version is available at:

<https://hdl.handle.net/10419/123932>

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CHALLENGES IN TOURISM DEVELOPMENT: CAN ISTANBUL SURVIVE WITHOUT A MASTER PLAN? ¹

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Abstract

Tourism has been considered as an instrument for urban and regional 'development' policies for many countries, especially for cities/urban areas. Cities are themselves among the important destinations. They offer many touristic attractions together and tourism facilities become a more important part of the urban appearance. Cities are unique and each destination has a different identity, which means that the researchers and planners would develop different planning strategies. What important issue from the view of planners and policy makers is to understand how they would develop the tourism associated with the uniqueness and potentials of the city? 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. The primary goal for Istanbul is looking after its historical, cultural and natural resources and providing the city with a global status. For Istanbul's being a global city, its tourism potential should be emphasized and developed. This paper provides a strategic review of the tourism development in Istanbul. It discusses the importance of tourism development and planning for Istanbul and evaluates current situation, in particular its strengths, weakness and problems, limited implementations and solutions, lack of tourism policies and planning issues. In conclusion, it highlights Istanbul urgently needs a clear sustainable tourism development strategy with a planned manner for a long span. To understand what Istanbul has lost without that strategy until now would be very important for shaping future developments.

Key words: urban tourism, tourism planning, tourism development, Istanbul

Jel codes: L83, O20

INTRODUCTION

Tourism industry has been used to create new opportunities by increasing the business capacity and to provide economic growth. After 1980, the economic and structural changes in Turkey affected the tourism sector as well. While the economy became export oriented, the significance of tourism as one of the main income generators for the national economy increased. After the tourism encouragement laws of 1982, coastal and developed regions received most of the investment capital in order to increase tourism revenue. The dominance of sea-sun-sand triangle on Turkish tourism brought the need for new approaches to extend tourism supply and demand throughout the country in the 1990s (Gezici and Kerimoglu, 2010). The aim was for alternative types of tourism to reduce seasonal concentrations and to help attract visitors throughout the whole year. The Five-Year Development Plan (1996-2000), highlighted the improvement of new alternative types of tourism by considering changing demands to achieve a more balanced seasonal and spatial distribution of tourism (SPO, 1995). Moreover, the first priority of Turkey's 2010 tourism vision is to emphasize the cultural variety and richness of Turkey (Ministry of Culture and Tourism, 2004).

¹ *this paper-the preliminary version- is prepared from the studies of Istanbul Tourism Master Plan, which has been continuing for two years, by conducting Istanbul Metropolitan Municipality.*

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Consistent with the policies to ensure tourism and cultural variety, cities are now more important as destinations. These developments have substantially raised the expectations of Turkish tourism from Istanbul, which is rich in cultural heritage and a place which has a unique atmosphere. In the 2000s the importance of urban areas in tourism development is realized in Turkey. Istanbul has the highest potential for tourism development in Turkey with cultural heritage focus, museums, exhibitions, festivals and with fair and congress tourism. Istanbul also has extraordinary natural resources as an urban destination. For Istanbul's being a global city, its tourism potential should be emphasized and developed.

While the latest economic and social strategies for urban economic development have a tremendous impacts on the space, land use decisions for creating new spaces with new functions, culture or tourism have a mutual effects on urban economy, social and quality of life and images of the cities. Touristic activities are attracting more visitors and allowing cities to become more competitive. While, new urban development strategies have been strongly influenced by a thinking of designing and constituting creative places and marketing them with culture and tourism activities (Kerimoglu, 2012), planning for tourism in the urban environment is problematic, lacking adequate models and consideration, and in consequence requiring a sophisticated and integrated approach to the complex flows and impacts that prevail in the 'dual' historic and contemporary city (Evans, 2000). This separation from local land-use planning and related economic development and amenity provision is also seen in the approaches to urban tourism planning, expounded by, amongst others, Getz (1986, 1987) and Hall (1992). Tourism planning is an accepted aspect of the management of tourism development, resources and operations (Getz, 1987; Inskip, 1991, 1994; Mill and Morrison, 1992). By adopting specific tourism policies and considering tourism development and impacts as part of other land use and environmental issues within development plans, greater success in local and city-wide tourism development and management will be achieved (Evans, 2000). A holistic tourism management system is demanded to facilitate the development and implementation of the tourism strategy, through funds allocation and monitoring, land use control, and examination of tourism public and private sectors practices (Buhalis, 2001). The planning process should encourage the complementarity and coexistence of economic activities, rather than promote sectoral separation and single-sector developments (Buhalis, 2001).

However, since understood the importance of tourism to the now in Istanbul, tourism development is still unplanned. Decisions to promote tourism development are not taken parallel to urban land-use development. How contemporary and rational is this unplanned approach? This paper provides a strategic review of the tourism development in Istanbul. It discusses the importance of tourism development and planning for Istanbul and evaluates current situation, in particular its strengths, weakness and problems, limited implementations and solutions, lack of tourism policies and planning issues. In conclusion, it highlights Istanbul urgently needs a clear sustainable tourism development strategy with a planned manner for a long span.

SITUATION ANALYSIS: TOURISM DEVELOPMENT IN ISTANBUL

Neo-liberal movements have strongly affected Istanbul in defining its vision to be a world-global city (Gezici and Kerimoglu, 2010). Istanbul has strong assets in order to position itself as tourism and cultural center, and also as a regional hub between Europe and Asia (ATTREG, 2012). Not only it connects Europe

and Asia, but also the Black Sea to the Marmara and the Mediterranean seas. Millenary historical heritage of Istanbul may explain its attractiveness for tourism (ATTREG, 2012).

Istanbul, the biggest city of Turkey on the basis of population (12 million), and the functions performed, and subject to the most rapid and great change under contemporary conditions, has a great potential to be an international city. Istanbul is the intersection point of the country and the region's transportation network, and has direct transportation capabilities to all regions, while its employment opportunities, infrastructure and social facilities are higher compared to other regions. The primary goal of Istanbul's local authorities is to look after the city's historical, cultural and natural resources, providing the city with a global status by making use of regional opportunities within the economic structures of the world and region, and to assume a leading role in this structuring by establishing a balanced development (Istanbul Metropolitan Municipality, 2009). Furthermore, it is inevitable to plan tourism elements of Istanbul in order to make the city competitive in the international arena, and to follow new trends in the world. The common view is that Istanbul has the highest potential for cultural tourism development in Turkey with a focus on cultural heritage, museums, exhibitions, festivals, and trade-fair and congress tourism. These functions and types of tourism are important contributors to the tourism sector by satisfying the visitors, but they can also make a significant contribution to the urban quality (Gezici and Kerimoglu, 2010).

Taking place in the list of UNESCO world heritage list and the outcomes of being European Capital of Culture (ECOC) in 2010; as ongoing projects to increase the capacities of hotels, museums and other cultural amenities, rapidly growing physical infrastructure, intensive activities to promote Istanbul and the efforts to link the city's urban heritage, culture, tourism and urban developing strategies are the opportunities for the future of Istanbul (ATTREG, 2012).

Tourism demand for Istanbul

In Istanbul, between 1990 and 2000 the number of tourists increased 110 percent, which is above the general increase rate of Turkey of 93 percent for the same period (TURSAB, 2002). In 2004, the number of foreign tourists visiting Istanbul was only 76 percent that of Barcelona, 30 percent that of London and 14 percent that of Paris (IMP, 2006). However, this number rose in more recent years; between 2000 and 2008 the number of foreign visitors tripled (Table 1). Today, although Istanbul is still behind London and Paris, the number of foreign visitors is nearly the same as that of Barcelona (Gezici and Kerimoglu, 2010).

Due to its business primacy, to the wealth of its historical heritage and of cultural activities, as well as to its unique position bridging two continents, Istanbul has always attracted large numbers of domestic and international visitors. In 2010, 7 of the 28 million tourists who visited Turkey touched down in Istanbul (Table 1), maintaining the approximate share of 25% of arrivals over the national figure. Among Europe's main destinations Turkey (2, 81%) posted a real growth in arrivals in 2009, despite the overall weak performance of Mediterranean Europe (-3, 8%) (WTO, 2010). Turkey grew a further 5% in 2010 (Table 1). There has been much growth in leisure and business arrivals from the Middle East (including Saudi Arabia, Syria and Iran) (ATTREG, 2012) and in business events in Istanbul (WTO, world tourism barometer, 2010).

Germans are the first market among international visitors, followed by Russians (ATTREG, 2012). According to visitors coming from the East, Istanbul is a place of opportunities, while for Western

visitors it is a unique, fascinating and authentic attraction hub and a window to the whole concept of 'the East' (ATTREG, 2012)

Table 1: Number of visitors to Istanbul and Turkey

	Turkey	Change%	Istanbul	Change%	Share%
2000	10 428 153	39,27	2 420 541	46,66	23,21
2001	11 618 969	11,42	2 517 139	3,99	21,66
2002	13 256 068	14,01	2 705 848	7,49	20,41
2003	14 029 558	5,83	3 148 266	16,35	22,44
2004	17 516 908	24,85	3 473 185	10,32	19,82
2005	21 124 886	20,59	4 849 220	39,61	22,95
2006	19 819 833	-6,17	5 346 681	10,25	26,98
2007	23 340 911	17,76	6 453 598	20,70	27,65
2008	26 336 667	12,83	7 050 748	9,25	26,77
2009	27 077 114	2,81	7 510 470	6,52	27,74
2010	28 632 204	5,74	6 928 867	-7,74	24,20
2011	31 456 076	9,86	8 057 879	16,29	25,61

Source: Ministry of Culture and Tourism statistics

However, increasing arrivals do not necessarily indicate greater benefits from tourism. Given short average length of stay for Istanbul and limited tourism product offerings targeting the different market segments, it is highly unlikely that the average spending of visitors is increasing at the same rate as the number of arrivals (GWU and BU, 2007).

The figures for the occupancy rate and average length of stay are still considered low. Average length of stay is 2, 1 in Istanbul (Ministry of Culture and Tourism, 2009), compared to 3 in Barcelona, and 4 in Paris and London (tourism statistics of London, Paris, Barcelona, 2009). According to official statistics average occupancy rates of Istanbul (approx. 40%) (Table 2) is also low when comparing with other main European Cities (77,2% in Paris, 74,50% in Barcelona) but according to hotel performance in August 2010, it was 71,8% in Istanbul, while 81,3% in London, 75,1% in Paris, 73,1% in Amsterdam, 67,1% in Berlin, 61,3% in Madrid (STR Global, 2010, UNWTO).

Table 2: Figures of tourism demand

	N. of arrivals	Nights spent	Average length of stay			Occupancy rate%			Accommodation type
	total	total	foreigner	domestic	total	foreigner	domestic	total	
2001	2853965	5976675	2,3	1,7	2,1	26,21	11,09	37,31	Hotels
	2981792	6217937	2,3	1,8	2,1	24,58	11,11	35,69	Other*
2005	4637159	9230189	2,2	1,6	2,0	35,36	14,81	50,17	Hotels
	4738883	9387459	2,2	1,6	2,0	34,82	15,15	40,97	Other
2010	4202483	9061425	2,3	1,7	2,2	34,53	10,18	44,72	Hotels
	4641209	10058536	2,3	1,7	2,2	34,36	9,73	44,09	Other

*Motel, Boarding house, holiday village, camping, golf est., training est., tourism complex, mountain house, boutique, apart, thermal hotel

Source: Ministry of Culture and Tourism statistics

Tourism supply in Istanbul

The supply side has followed this trend, having undergone strong modernization in the last decades (ATTREG, 2012). Today, besides being one of the largest hotel markets in Turkey with a room capacity of more than 30,000, almost all of which consist of city hotels, Istanbul has also become one of the most successful cities in terms of sector performance, with a ADR (average daily room rate) of €155 in 2009, while in 2010 €155 was maintained as ADR in spite of the increasing room supply (ATTREG, 2012). Even though it is the city with the largest hotel stock in Turkey, it still presents opportunities to hotel investors as it continues to attract international attention. Over the last few years, several international chains have opened in Istanbul's European side, and some are now considering the relatively backwards Asian side. Operators of luxury boutique hotels are especially in competition with each other to run a hotel in Istanbul that will reflect the prestige of their brands (Colliers Turkey, 2010).

In general, the number of beds in Istanbul was 79,065 (Ministry of Culture and Tourism, 2007). Although this number was far behind that of cities like Paris and London, the low occupancy rates indicate that in fact the bed capacity is not the issue for tourism in Istanbul. By 2012, total number of beds in Istanbul is 102,000 (Ministry of Culture and Tourism, 2012) (Table 3). In order to realize the significance of these numbers, it would be helpful to have an overview of the main tourism attractions based on the heritage sites, museums, events, arts and festivals (Table 4-5) (Gezici and Kerimoglu, 2010).

Table 3: Supply of accommodation

	Number of establishments	Number of rooms	Number of beds	Number of 5 star hotels	Number of 4 star hotels	Number of beds share in Turkey%
European Site	428	30 138	87 506	37	86	14,3
Anatolian Site	68	3 716	14 763	8	3	
Istanbul	496	33 854	102 269	45	89	

Source: Ministry of Culture and Tourism, 2012

Table 4: Cultural facilities

Number of museums	Number of public art galleries	Number of halls ¹	Number of cultural centers	Number of festivals ²	Number of art galleries	Number of event places /halls ³
78	14	143	92	136	172	254

¹ theatre, opera, concert halls and stages of cultural and convention centers, ² visual arts, music, film, ³ festival and exhibition places

Source: inventory of Istanbul cultural heritage and culture economy, 2010

Coupled with the fact that cultural heritage tourists are a major target market for Istanbul, the museum visitation of the tourists ought to be relatively high. However, the current level of museum visitation in the historic peninsula is low. Istanbul is far behind other European cities in terms of number of museum visitors (Table 5).

Table 5: Number museum visitors

Museum	Number of visitors	Number of visitors	Number of visitors
		London/British Museum-2009	Paris/Notre Dame-2009
Topkapı Palace-2009	2 932 429	5 932 897	13 600 000
Hagia Sophia-2009	2 444 956		
Kariye-2009	324 622		
Archeological museum-2009	242 867		
total-2007	6 500 000	25 400 000	27 000 000

Source: Directorship of Istanbul Tourism and Culture, 2010, London Tourism Office, Paris Convention and Visitors Bureau Statistics

Istanbul as a tourist destination

In terms of tourism product and target markets, Turkey mainly competes with other similar Mediterranean destinations. In this context, many regard Istanbul as a gateway to sun and sea destinations, attracting visitors for an average length of 2.1 days, compared to the average of six-seven days for coastal destinations. However, leading travel publications include Istanbul in their lists for Top Ten European City destinations, safest cities in Europe and top global destinations (Gezici and Kerimoglu, 2010).

Euromonitor International's Top City Destinations Ranking, covering 100 of the world's leading and most dynamic cities in terms of international tourist arrivals, ranked Istanbul as the 9th most visited city in 2009 with 7.5 million arrivals, a 7% increase on 2008 (ATTREG, 2012). The next year, it ranked 6th, right above Rome, in the list of hotel value per room; in the last seven years it stepped up five positions in this rank, proving the strength of its hotel market (Colliers Turkey, 2010; ATTREG, 2012).

On the other hand, the richness and vibrancy of the local culture, the combination of modernity and elements of ancient histories, the unique location spanning over two continents, and the praised local cuisine constitute intangible elements that are part of Istanbul's competitive advantage (GWU and BU, 2007).

While Istanbul's image is first and foremost one of an urban and heritage tourism destination, the Congress and Conventions sector (C&C) – an emerging industry of the "mobile" global world -has become one of the most important components of Istanbul's economy (ATTREG, 2012). The progress with the positioning of Istanbul as a C&C destination is impressive: according to ICCA (International Congress and Conventions Association) in 1999 it hosted 23 congresses, 66 in 2007, and 80 in 2009, reaching the 17th place as congress city in the world; in 2010, ICCA already classifies Istanbul as the 7th most popular C&C location in the world, and the 6th in Europe, with 109 congresses organized, attracting a total of 46,374 visitors (ICCA 2010; Hurriyet Daily News, July 5 2011; ATTREG, 2012).

It has been still discussed that being a European Capital of Culture in 2010 was a very important yardstick for Istanbul or not? In particular, the activities and projects that were realized by the Istanbul 2010 European Capital of Culture Agency (450 projects with an international character) brought about a structural change in the vision of Istanbul for the future.

SWOT analysis for Istanbul tourism

Increasing number of organized events is main strength of Istanbul nowadays. High population density, traffic congestion, insufficient transport infrastructure, irregular settlements and destruction of natural environment are defined as the weaknesses of the city in attracting visitors and tourism development as well (Table 6).

Table 6: SWOT analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Cultural heritage • Geographical location • Cultural diversity • Ethnic diversity and related production • Cultural/ethnic shopping • Cuisine • Bridge between Asia and Europe/East and West • Bridge between different cultures • Natural resources-urban ecology • Long shoreline in the city-related facilities • Qualified tourism supply in particular accommodation and conference and health tourism facilities • Market facilities • Increasing foreign investments • Good climate for tourism • Increasing number of organized events after ECOC 2010 	<p>Weaknesses</p> <ul style="list-style-type: none"> • High population density and crowdedness • Traffic congestion and insufficient transport infrastructure • Irregular settlements • Destruction of natural and cultural environment • Lack of professional protection of cultural heritage • Lack of legal regulations on protection of ecological, natural and cultural sites • Lack of inspection for ecological, natural and cultural sites • Legal and administrative problems and disconnection among actors • Lack of promotion and marketing policies/strategies • Lack of tourism planning and strong initiatives • Lack of inventory • Conflicts of authorization, power of central government on local • Lack of cultural facilities such as concert halls, festival areas, museums etc. • Limited capacity of marinas and ports • Lacking services at museums
<p>Opportunities</p> <ul style="list-style-type: none"> • In a wide variety of tourism types • Strong tourism potential/cultural-natural • Underutilized tourism resources • Accessibility-location-closeness to Europe • Regional hub/high transfer and mobility • Center of attraction for investors • Good location for cruise trips 	<p>Threats</p> <ul style="list-style-type: none"> • Unstable country agenda • Ineffectiveness of legal regulations • Administrative chaos on urban development issues • Urban development-re-generation works/unplanned/defective decisions- implementations • Land-use decisions/projects of central government unconnected with local • Un-cooperation among public-private • Leaving out private sector and residents for taking decisions • Lack of transportation and technical infrastructure • Lack of awareness for importance of urban ecology, cultural heritage and natural resources • Water pollution • Illegal constructions in natural areas

LACK OF TOURISM POLICY AND PLANNING

Several tourism planning paradigms have emerged from the broader traditions of urban and regional planning. These paradigms generally aim to reduce tourism's negative impacts and enhance its positive impacts from the past (Timothy, 2010). They include community-based planning, wherein locally defined

goals and local development actions are an integral part of tourism planning (Murphy, 1985, 1988; Prentice, 1993; Simmons, 1994), incremental planning, which allows for high levels of predictability and flexibility (Getz, 1986, 1987; Baud-Bovy, 1982), and collaborative planning where all stakeholders are permitted and encouraged to participate in the decision-making process (Gunn, 1994; Dowling, 1993; Getz & Jamal, 1994; Jamal & Getz, 1995). Tourism ought to be integrated into the overall plan and total development strategy of a region (Lee, 1987; Inskeep, 1991). This is often referred to in the literature as integrative planning (Marcouiller, 1997). Several authors have stressed the importance of not singling out tourism alone for development (Timothy, 2010). Rather, it should be planned in conjunction with a region's broader development goals; tourism should be one element of broader regional development planning (Baud-Bovy, 1982; Inskeep, 1987, 1988; Marcouiller, 1997). These main principles are operative for urban areas as well. In this study, integrated approach is embraced for discussing tourism planning in Istanbul. It is believed that integrated tourism planning should be best way for Istanbul tourism development owing to Istanbul is a very complex and huge metropolis with varied tourism resources and too many different sectors and functional areas.

Depending on the general verifies and admissions and rational implementations in global tourism planning, development of Istanbul tourism is required in relation to whole country development strategies. Obviously, tourism development for Istanbul should be integrated with urban development in a planned manner. Tourism master plan/tourism development plan or similar legal planning documents for tourism, doesn't exist for guiding tourism development in Istanbul. Tourism is frequently emphasized as an important development tool in urban development strategies in different leading documents and planning studies.

When we look at urban development documents/planning studies, in recent years, nearly all the most important planning documents of Istanbul (Master Plan of Istanbul, Regional Plan of Istanbul, OECD Territorial Review, and Competitiveness Index of Provinces in Turkey) express a vision to be more competitive in the financial and logistic sectors, as well as in tourism and innovation. Furthermore, the question whether Istanbul might become an economic hub in the Euro-Asia region has affirmed as one of the key questions for the city, as is claimed by the OECD Territorial Review (OECD, 2008).

The Master Plan approved by the Metropolitan Municipality in 2009 with a planning horizon spanning to 2023, and the Development Plan prepared by the Istanbul Development Agency in 2010, are the most recent policy documents that affirm those ambitions and set up the conditions to achieve the development objectives (ATTREG, 2012). The two main strategies of the Istanbul Master Plan are to raise the competitiveness and provide sustainability. Several challenging objectives exist: the conservation of Istanbul's historical and cultural heritage, the preservation of Istanbul's natural resources, the development of new activities and the enhancement of the diversification of the economy (Table 7). According to both the OECD Report (2008) and the Istanbul Master Plan (Istanbul Metropolitan Municipality, 2009), Istanbul should have a broader perspective regarding its position as a regional and international center, and should make use of its key qualities in finance, logistics, culture, tourism and innovation (Gezici and Kerimoglu, 2010). The general directions of the Istanbul development policy targets, stressed in current official documents are summarized in Table 7.

Table 7: Strategic lines-policy targets in existing documents

<p>Istanbul Metropolitan Area Master Plan- 2009</p>	<ul style="list-style-type: none"> • To provide economic, social, spatial and environmental integration <p>Line 1: to provide the statue of the city of culture oriented tourism Line 2: based on information and technology for providing high economic competition with sustainable economy Line 3: sensitive the historical cultural values to enable the development Line 4: to higher quality of life Line 5: strengthen social capital Line 6: enabling the social justice and integration with the city</p>
<p>Development Plan prepared by the Istanbul Development Agency- 2010-2013</p>	<ul style="list-style-type: none"> • Global competitiveness <p>Being a global attraction tourism center</p> <ul style="list-style-type: none"> - To create an image and marketing city in international market - To provide tourism variety through whole year - To increase length of stays - To increase quality of quantity of tourism infrastructure <ul style="list-style-type: none"> • Social development • Environmental and cultural sustainability <p>Preserving historical and cultural heritage</p> <ul style="list-style-type: none"> • Quality of urban space • Transportation and accessibility
<p>Strategic Projects of Istanbul 2010 ECOC Agency- 2009-2010</p>	<ul style="list-style-type: none"> • to expose unique features of Istanbul • to realize projects for preservation of cultural heritage • to improve infrastructure of and participation in culture and arts • to promote Istanbul through culture and arts • to increase Istanbul's share in cultural tourism • to encourage residents of Istanbul to participate in decision making process
<p>Action Plan of Turkish Tourism Strategy for 2023 by the Ministry of Culture and Tourism- 2007-2013</p>	<ul style="list-style-type: none"> • strengthen tourism infrastructure for Istanbul • to improve infrastructure for conference tourism and exhibitions • to improve marinas for well connection of sea tourism • to improve ports for cruise tourism

The visions of both plans have common aspects to make the city more competitive (Kerimoglu, 2012). Istanbul's Expert Commission Report within the 8th Five-Year Development Plan (published by the State Planning Organization in 2000), and the Istanbul 2023 Vision and Strategic Action Plan (published by the Istanbul Metropolitan Municipality) articulate the municipal level efforts to link the city's urban heritage, culture, tourism and urban developing strategies (ATTREG, 2012). After the declaration of Istanbul as the 2010 European Capital of Culture, the Ministry of Culture and Tourism announced its support for many regeneration projects that will take place with collaboration between public-local government and institutions-NGO's-educational- art and culture institutions in the mentioned historical quarters (Ministry of Culture and Tourism, 2009). Therefore, Istanbul's historical heritage makes the city an attractive tourism destination and Istanbul's recent nomination as the 2010 European Capital of Culture led to a series of renovation, restoration and demolition projects, complemented with financial incentives to increase the tangible capacities such as hotel, museums and other cultural amenities (OECD, 2008).

These functions and types of tourism are not only seen as their contributions to tourism sector by satisfying the visitors, but also expected to make significant contribution to the urban quality providing several cultural activities and infrastructure to the local people. Therefore, there is an agreement that Istanbul should make a progress for cultural tourism; in order to get it is desired with rich cultural heritage and diversity. On the other hand, tourism and culture might be a key tool for restructuring the economy and space of the city. Recently, declaration of Istanbul as Culture Capital of Europe in 2010, projects and funds would be an opportunity providing a right combination of culture, tourism and urban regeneration (Kerimoglu and Gezici, 2010).

In Turkey, Ministry of Culture and Tourism is an official responsible for tourism development and management. In 2007, the Ministry prepared an Action Plan for Turkey, is named 'Tourism Strategy of Turkey 2023 and Action Plan 2013'. This document is very important for planned tourism development in Turkey, was being an initial document for struggling to plan Turkish tourism. Afterwards, many decisions for some tourism destinations have not been implemented scheduled time span of the plan. Despite the good intention and planning efforts for tourism development in Turkey with this plan, the reasons of implementation problems are derived from problems of cooperation among all actors. It has not been achieved that bring together all actors such as public, private sectors, NGOs and residents for discussing their future roles and contributions to the process and also inform and promote the plan. There was a lack of awareness for the importance of tourism development and main issues about the plan.

In spite of the local authority's powers over the Istanbul Metropolitan Area, the influence of the central government on planning are still very strong and enforced through autonomous, top-down decisions without any integration with the Istanbul's master plan. It is also remarkable that several ministries that have competencies in the spatial development of Istanbul. For example, if the Ministry of Culture and Tourism declares that an area within the city is to develop as a tourism center, the planning authority over that area belongs to the Ministry and the Municipality is not involved in this process at all (ATTREG, 2012). These power struggles between the authorities created conflicts and a fragmented approach towards the spatial development of the metropolitan area (Gezici and Kerimoglu, 2010). Coordination between public powers and the private sector has greatly increased in the recent years, but not enough. Entrepreneurs in every sector, but especially real estate developers, have progressively taken a key role

in the governance of the city transformation process. With the consequent increase of its attractiveness: for instance, in relation with cultural events, where collaboration between the Ministry of Culture and Tourism, the Metropolitan Municipality authority and several private sector initiatives are fundamental. However the lack of coordination between different institutions has always caused overlaps or lacking points which make all the efforts less efficient (ATTREG, 2012).

Lack of social awareness and acceptability of planning actions; inadequacy of technical support for planning intervention; a centralized administrative structure, unconnected with local are main obstacles for rational planning.

Towards a tourism master plan: strategy formulation for Istanbul tourism development

Istanbul is proposed and promoted as a tourism center in all official urban development documents in different levels. In spite of tourism is approved very important tool of urban development by all official strategies and policies, we should stress here again, the tourism master/development plan of Istanbul doesn't exists. Istanbul has very important tangible and intangible tourism resources in particular, cultural heritage and delicate nature and ecology do not let to be developed by cursory. Tourism development shouldn't be free from urban development and infrastructure of the city. Then, what should be the main strategies of Istanbul tourism master plan?

Obtaining balanced distribution at the whole city; encouraging mix-land-use; providing maximum product variety and related tourism types by ensuring whole year tourism activity in the city; supplying easy and fast accessibility to tourism resources, activities and infrastructure for visitors and residents as well, should be main principles of Istanbul tourism master plan.

Balanced distribution would implement; to plan tourism resources in relation to all tourism types and main tourism activities in relation to supporting infrastructure and all related functions for taking care of balanced development between Europe and Asia, both sides and center and periphery.

Mix-use would implement; to plan all activities related with tourism types/related land use decisions integrated with all other urban activities, functions/land use decisions and infrastructure facilities.

Maximum tourism product/variety of tourism types and quality would offer; to plan all resources for protecting natural and urban ecosystem, taking care of protect-use balance and carrying capacities.

Accessibility would implement; to provide easy, quick and qualified accessibility to all urban and tourism facilities for visitors and residents in relation to their expectations and needs regarding to equality principle.

DISCUSSION: ISTANBUL TOURISM NEEDS A MASTER PLAN

It is a basic fact to be emphasized that Istanbul needs a tourism master plan due to the development of tourism cannot be controlled without a plan; the preservation and effective use of all tourism resources have great importance in parallel with Istanbul's expectations towards tourism. It is not possible to obtain desirable tourism development which is depending on increasing number of visitors and revenues, creating positive image by means of tourism, increasing recognition and awareness of Turkey

and Istanbul in international market by means of tourism and by using this attracting visitors and capital to Istanbul, without a plan and certain projections.

Planning approach that considers not only visitor's expectations but also resident's needs; supplies infrastructure in relation to tourism facilities; oversees equality principles for all users and fosters easy accessibility to all facilities, should be carried out.

Increasing environmental and urban life quality and standards of urban infrastructure; considering urban risks in particular natural disasters must be necessity to plan tourism development in Istanbul.

Visitors and their expectations and needs are main component of tourism. They are giving direction to tourism types and activities. Within the whole planning concept they are one of the elements of whole urban planning and facilities as well. Therefore, tourism planning should be connected with urban development. Within the scope of diversifying tourism types such as, cultural, ecotourism, sports, adventure, congress, business, sea-sun-sand, cruise, health tourism should be developed. Natural and cultural sites, museums, entertainment facilities, cultural centers, festival areas, shopping centers, commercial areas, open spaces, recreational areas and parks, accommodation facilities, restaurants, bars, coasts and regeneration areas should be used for the purpose of increasing tourism facilities, instead of creating completely new areas, if not necessary. By reason of tourism is increasingly recognized as an instrument for regional and urban development policies, especially for socioeconomically depressed and problematic areas as well, using tourism as an investment and development tool would be very important.

A consistent tourism policy based on professional development and implemented through a Master Plan is urgently required. Quantifiable and measurable tourism policies should be established.

FINAL REMARKS

Today, tourism is still keeping on as an unplanned activity without any concern for environmental preservation, land planning, research and awareness of the indigenous population or employment around the tourism industry (Gezici and Kerimoglu, 2010). As a result, tourism development has been based on occasional/adhoc needs, policies are irrelevant to local needs and integrated approach and they produce conflicts. The main problem is the planning process of tourism development is controlled by external actors, such as central government, through decision-making and funding of tourism-related projects. Due to the lack of a tourism master plan for the tourism development in Istanbul, bad management and inadequate coordination among real actors, many opportunities for contemporary tourism development, increasing tourism revenues and number of visitors are missed (Gezici and Kerimoglu, 2010).

To be able to offer quality service with a strong infrastructure in every type of tourism should be considered as the facts to increase the attractiveness. More attention could be put to attract repeat visitors and cultural events, or promote competitive creative industries linked with traditional industries (ATTREG, 2012).

In urban regeneration projects that have been very popular in recent years, tourism as an important activity mostly has been taken part in these popular projects and also all other urban development strategy documents. But, these projects were created and implemented far from the integrated approach; most of them do not in touch with the whole city land-use. Future spatial and sectoral plans

of any economic sector, in particular tourism should be integrated with urban development strategies and official spatial plans. Otherwise, all decisions about space (land-use) and urban implementations/projects will be disconnected not only from each other but also whole city development. It causes chaos like today by pressuring on transport and technical infrastructure of whole city, destroying natural and cultural environment, increasing population without any projections, causing pollution and decreasing quality of life.

Conflicts among authorities and incompetency that are often faced with are the main obstacles for urban and regional development in Turkey, thereby spatial development of Istanbul. Development strategies and spatial development decisions which were taken by central government cause disagreements among real actors such as local municipalities, NGOs, private sector companies and residents. Common idea among actors, in particular NGOs and residents is land-use decisions of central government cause land speculation for investors. These are not for the public interest. For the future development it would be very important to foster public-private cooperation.

In order to sustain tourism development, natural and cultural sites must be protected; the implementations in these areas should be integrated with tourism and urban development of whole city in planned manner by considering carrying capacities. Increasing number of tourists and revenues and re-visits are not possible without a development plan.

Single-handed management should be necessary for tourism development in Istanbul. It should be supported by regulations. Stability is important as well to make tourism development sustainable.

A unified urban regeneration strategy would require a holistic approach to incorporate all of these areas of provision: a tourism planning policy would therefore look to the integration of industry and community need, tourism trends, preferences and opportunities within a planning framework (Evans, 2000): 'Local authorities would have to overcome 'depart mentalisation' and move towards a more corporate, integrated approach to policy-making in order to implement a [planning]strategy' (Bianchini, 1991).

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