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A COMPARISON OF ISTANBUL AND ANTALYA AS TOURISM DESTINATIONS

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ABSTRACT

Liberal economic policies implemented during the 1980s to integrate the Turkish economy into the world economy resulted in inbound tourism development in Turkey. Istanbul became a prime city destination and a hub for inbound tourism demand, while Antalya became an important mass tourism destination on the Turkish Mediterranean coast. This paper compares these two destinations in terms of their tourism supply, facilities, tourism types, demand characteristics and foreign visitor profiles.

Key Words: Destination, Istanbul, Antalya, tourism types, products.

INTRODUCTION

The tourism industry plays an important role in generating foreign exchange in Turkey. Initially, the Turkish tourism industry was comprised of medium-sized enterprises offering city-based cultural tourism products focusing on the culture, history, archaeology, heritage and man-made resources of the country. Prior to the 1980s, travel trade enterprises sold city-based cultural products in the international tourism markets and received only a minor share of the foreign tourism demand. After the mid-1980s, Turkey became a well-known tourism destination. Its share of international visitor arrivals within Europe steadily increased. Economic policies transformed Istanbul into a major European city destination. Located at the periphery of Europe, Turkey became a mass tourism destination at a later stage than elsewhere in the Mediterranean. The development of supportive systems for a viable tourism industry open to international competition occurred in stages and during the early 1980s tourism in the country developed systematically (Göymen, 2000; Korzay, 1994), but the costs were high and there were periods of stagnation. Internal factors such as economic stabilization measures, incentives to attract foreign investors, liberalization of foreign trade, removal of exchange controls – in essence neo-liberal market economy policies (Altunisik and Tür, 2005) – affected the nature of tourism development and ultimately shaped the local tourism industry. This paper aims to examine this issue through a comparison of the tourism supply, characteristics of the tourism industry and inbound tourism demand of Istanbul and Antalya.

TRANSITION FROM CITY TOURISM TO MASS TOURISM

In 1982, the Tourism Encouragement Law was enacted which allocated public land for tourism investors and provided financial

on costs. The model of mass tourism and the type of holiday provide tour operasubsidies to accommodation investors. The South Antalya Tourism Development Project was realized to create a suitable environment for the development of inbound mass tourism (Inskeep and Kallenberger, 1992). A tourism-specific infrastructure was built on the Mediterranean coast of Antalya through credit lent by the World Bank. This tourism-specific infrastructure triggered the construction of large-scale resort hotels and holiday villages to meet the demands of multinational tour operators and European pleasure tourists. The World Bank and International Finance Corporation (IFC) are influential in the development of tourism infrastructure and facilities in developing countries (Hawkins and Mann, 2007). The IFC, participating in joint ventures, invested in city hotels in Istanbul and in resort hotels along the Mediterranean coast of Antalya. European holiday tour operators then promoted Antalya as a new coastal holiday destination. Earlier, Turkey had favoured small-scale city-based cultural tourism with local investments. The adoption of public policy in favour of “coastal mass tourism” (Bramwell, 2004) attracted international hotel chains, multinational tour operators and foreign leisure airlines to Turkey. These firms jointly produced standard mass holiday packages and played a crucial role in Turkish tourism.

The focus on mass tourism led to the neglect of sustainable city tourism. Moreover, coastal mass tourism has limited spill-over effects on the economy. Resort-type accommodation investments realized along the coast of Antalya resulted in two outcomes: all-inclusive holidays emerged as the dominant product type and the profile of foreign visitors shifted from middle and high-income city-based culture and heritage tourists to “middle and low-income resort holidaymakers” (Aksu et al. 2008). Currently, Turkey’s packaged tourism products primarily comprise of beach holidays while multi-destination cultural tours comprise a niche market.

Ever since the policy of mass tourism was adopted, the local tourism industry has tried to overcome various political and economic crises over which neither they nor Turkey have any control (Yarcan, 2007). Such crises decrease both the volume of foreign visitors and the prices of tourism products sold in the international markets because the products are identikit and the demand is elastic. Yet, the governments did not provide incentives for Turkish-owned private airlines and tour operators to increase the competitive strength of these firms against their foreign counterparts. Failure to promote Turkey as a cultural destination, coupled with several crises, is an obstacle to the marketing of Turkish tourism products (Okumus and Karamustafa, 2005). Political conflicts and wars in the region have negative effects on the volume of international tourism demand in the Eastern Mediterranean and, to varying degrees, these on-going disputes also affect the tourism industries of nearby countries (Beirman, 2003; Tasci, Gartner and Cavusgil, 2007). Unfavourable country and destination images intensify the difficulties of marketing Turkey's tourism products in international markets (Alvarez, 2010). After the realization of coastal tourism-specific infrastructure and superstructure investments, the Turkish tourism industry became prone to the effects of external factors. Standard all-inclusive beach holidays are sold at low prices. Turkish tourism firms have adopted a policy of selling all-inclusive holidays at competitive prices (Baum and Mudambi, 1994; Campo and Yagüe, 2008) and recently also do so through advance sales and last minute booking systems. The contribution of mass tourism to the economy is limited due to the consumption of tourism products in resort enclaves or "tourist bubbles" (Judd, 1999). Foreign holidaymakers stay at coastal resorts and do not have contact with the locals. Hence, a realistic image of the destination cannot be conveyed. The isolation of mass tourists is a policy used by tour operators to control the supply chain and the package holiday components with the aim of maximizing profits by diminishing transactitors a power over the hoteliers at the destination (Buhalis, 2000). All-inclusive holidays also meet tourists' expectations because extra expenditure is not incurred at the destination.

ISTANBUL AND ANTALYA AS TOURISM DESTINATIONS

City tourism creates sustained continuous demand. City tourism is closely related with culture; visiting a city is a cultural and enriching experience (WTO and ETC, 2005). Istanbul is unique within Turkey for its plethora of cultural, historical, heritage, social, religion and man-made attractions for foreign visitors. The principal tourism products of Istanbul are not produced solely for visitors as attractions (Maitland, 2010). Tourists visit the city in organized tours or independently, and foreigners and citizens encounter each other within the city. City tourism creates a favourable destination image. Due to the nature of the varied products that are available and the mutual use of city facilities by visitors and residents alike, the cost of developing city tourism is low. Istanbul attracts more foreign visitors each year because of the improvements being made to its infrastructure, airports and seaports, transportation links and hotel investments. Economic and financial activities, foreign trade and the existence of international firms in the city all play a role in this process. In 2011, Istanbul was the most visited city in Turkey with 8,058,879 foreign visitors and 113,432 beds (Istanbul Directorate of Culture and Tourism [IDCT], 2012). The Antalya region is the prime mass tourism destination with 10,900,914 foreign visitors and 431,215 beds (Antalya Directorate of Culture and Tourism [ADCT], 2012). Turkey's market share of international visitor arrivals in Europe and in the Mediterranean has steadily increased since 1982, reaching 1.9% and 3.3%, respectively, in 1990. When Istanbul started to become a well-known city abroad, Turkey's share of visitor arrivals in Europe and in the Mediterranean increased to 2.7% and 4.5% in 2000 and to 6.0% and 9.4% in 2010, respectively (Ministry of Culture and Tourism [MCT], 2011a; UNWTO, 1980-2007; UNWTO, 2009-2011).

Istanbul is located on the sea of Marmara and Antalya is on the Mediterranean coast in the south of the country. They differ in their infrastructure, tourism resources, tourist attractions, facilities, tourism types and products. Istanbul is a world city (Alvarez and Yarcan, 2010) and a European Capital of Culture (2010), whereas Antalya and its environs is a coastal tourism destination. Istanbul attracts all types of foreign visitors from many different countries. Antalya attracts mostly European pleasure holidaymakers. Istanbul has developed through its internal dynamics as an urban destination. The local tourism industry is influential in marketing Istanbul abroad as a "historic and former capital" (Maitland and Ritchie, 2009:18). The city is an arrival and departure point for foreign cultural tourists and for participants on biblical, archaeological, heritage tours that also visit other destinations in Turkey. The existence of tour operators, hotel chains, private sector airlines, dining and nightlife establishments, meting venues and retail outlets in Istanbul facilitated the process whereby it became a preferred city to visit. The role of Istanbul in Turkish economy, its high per capita income, ports and links with the western world facilitated tourism development in the city (OECD, 2008). In return, tourism contributes to the economy of Istanbul; meeting centres, hotels, other tourist facilities, restored and conserved historic urban texture are a part of a city's revitalization process (Judd and Fainstein, 1999). The city is a logistics hub for advanced service sectors, foreign investment and trade (Özdemir, 2010) as well as a centre for the arts, festivals, heritage and cultural industries (Gezici and Kerimoglu, 2010). Antalya has only a few

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cultural activities such as the Antalya Film Festival and Aspendos Festival. The dynamics of tourism in Istanbul are inherent and endogenous, whereas tourism development in Antalya is externally driven by multinational tourism enterprises, hence its dynamics are dependent and exogenous.

With regard to the MCT licensed accommodation capacity of Turkey, this has steadily increased since 1982, reaching 629,465 beds in 2010 (MCT, 2011b). In the early phases of Turkish tourism, Istanbul ranked first in bed capacity and foreign visitor arrivals, but eventually lost its share to Antalya, signifying a transition to coastal tourism. In other words, the inbound tourism demand shifted from city and cultural tourism to sojourn mass tourism. Hotel investments are concentrated in three districts of Istanbul to meet leisure and culture tourist demand, and also business and corporate demand. These regions are the Historic Peninsula, the Taksim district and the central business district in European Istanbul. As the usual case is, mass tourism in Antalya developed through large-scale accommodation investments in spatially polarized zones (Erkuş-Öztürk, 2010). Mass tourism is seasonally and spatially concentrated (Bramwell, 2004). The ribbon accommodation investments along the Antalya coast have led to environmental degradation. Social and cultural effects are observed in small towns due to employment in the tourism industry and the changes in income levels and family structures. In the case of both destinations, accommodation is of high quality. Currently, 76% of beds in Istanbul and 86% of beds in the Antalya region are boutique or special hotels, four and five star hotels and holiday villages (IDCT, 2012; ADCT, 2012). Room revenues are relatively high in Istanbul (Deloitte, 2009), whereas in Antalya, all-inclusive rates are quite low.

THE ROLE OF TOUR OPERATORS AND AIRLINES IN INBOUND TOURISM DEMAND

Foreign tour operators have played a crucial role in Turkish inbound tourism development. During the mid-1980s, multinational tour operators created a new modern holiday destination image for Turkey in order to increase the tourism demand, widen their market and product profile and, consequently, increase profits. European tour operators' behaviour in producing and selling all-inclusive holidays is coherent with the sun and sand tourism model (Aquilo, Alegre and Sard, 2005). Although foreign firms dominate the inbound mass tourism market, there are 24 Turkish-owned holiday tour operators in Europe, the Russian Federation, CIS countries and Egypt that also sell other Mediterranean sun destinations. There are also at least 18 Turkish-owned specialist operators based abroad that market Turkey as a culture and heritage destination (turizmgazetesi.com, 2011). In Turkey itself, there are 10 foreign tour operators that create and direct pleasure tourists' demand to Antalya, a few of which are joint ventures with local operators. Foreign firms also operate in the city and cultural tourism market segments. The Turkish tourism industry is internationalized due to structural shifts in tourism types and holiday patterns (Jacobsen, 2003). Currently, the majority of diagonally integrated multinational and Turkish-owned tour operators in Europe sell Turkey as a destination for all-inclusive beach holidays.

With regard to tourist transportation, over the last two decades, Turkish-owned private airlines and low-cost airlines have increased their seat capacity and improved their flight networks. Private and low-cost airlines have increased the inbound tourism demand particularly for Istanbul. Currently, there are 11 Turkish-owned private airlines with 27,731 seats (Turkish Private Aviation Enterprises Association, 2011). In 2010, the flag carrier, Turkish Airlines, with 27,886 seats, was flying to 132 cities in 82 countries (Turkish Airlines, 2011). Turkish Airlines has a wide flight network and generates cultural tourism demand for Istanbul and Turkey from distant countries. Low-cost airlines create new visitor demand and enable leisure tourists to revisit Istanbul, such as weekend and city escapist travellers from Europe. Leisure airlines that are integrated with holiday tour operators carry organized package tourists to Antalya. Turkish-owned private airlines also fly to Antalya from the main cities in Europe.

THE CHARACTERISTICS OF INBOUND TOURISM DEMAND

As mentioned above, Istanbul and Antalya have different tourism products and tourist attractions. Istanbul attracts foreigners who have a variety of motivations to travel, both from Europe and distant key demand generating countries. In 2011, the top six countries, Germany, the Russian Federation, the USA, Italy, France and the United Kingdom generated 39% of the foreign visitor demand for Istanbul (ICTD, 2012). Antalya attracts sun-lust holidaymakers from Europe and, for the same year, the top six countries, Germany, the Russian Federation, the Netherlands, the United Kingdom, Sweden and the Ukraine generated 69% of all inbound tourism demand for Antalya. In fact, Germany and the Russian Federation generated 53% of the total inbound demand for Antalya (ACTD, 2012).

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The latest available detailed data on foreign travellers' reasons for visiting Istanbul and Antalya date to 2008 (Turkish Statistical Institute [TUIK], 2008). This data show that, in the case of Istanbul, the reasons cited are: leisure (43%), business (19%), visiting friends and relatives [VFR], (12%), shopping (10%), culture (9%) and other reasons (7%). Leisure activities in Istanbul include experiencing daily city life, viewing architecture, visiting monuments and historic bazaars, cruising on the Bosphorus, and enjoying entertainment and nightlife. A survey conducted in the Historic Peninsula of Istanbul among foreign visitors on the image of Istanbul shows that the respondents have a favourable image of the city (Sahin and Baloglu, 2011). Istanbul is perceived as historic, pleasant, colourful, modern, dynamic, relaxing as well as a blend of East and West, rich in cultural heritage and architecture. According to another research conducted among foreigners visiting the main museums of Istanbul, the images they have are also highly favourable. Istanbul is perceived as modern, a city with rich entertainment and nightlife, a city to relax in and experience a different culture and atmosphere (Altinbasak and Yalcin, 2010). Such comments are in conformity with Istanbul's principal attractions; the Blue Mosque, the Bosphorus, Hagia Sophia Museum and Topkapi Palace Museum. On the other hand, foreigners visit Antalya for leisure (83%), culture (6%), VFR (3%), business (2%), shopping (1%) and other reasons (5%) (TUIK, 2008). The main leisure activity in Antalya is a beach holiday, and entertainment is organized in the hotel or holiday village. The data on museum visits in the Antalya region indicate that culture does not imply history, archaeology, religious attractions or local life. In 2011, the most visited museum in Istanbul by all visitors, Turks and foreigners, was Hagia Sophia (3,196,110 visitors) followed by Topkapi Palace (3,024,152 visitors). The most visited museum in the Antalya region was Hagia Nicholas (587,692 visitors) followed by the ancient city of Myra (544,846 visitors), where the patron saint of the Russian Orthodox Church, Hagia Nicholas, was archbishop. Only 128,610 people visited the Antalya Museum (MCT 2011c). Although the cited museum data include the Turks, foreign visitors' reason for choosing both destinations for culture can be misleading.

In both destinations inbound tourism demand is seasonal, although it is more evenly distributed in the case of Istanbul. The demand distribution for Antalya is highly seasonal with peak summer months. In 2011, 60% of all foreign visitors arrived in Istanbul between May and October, while 83% arrived in Antalya during the same period (ICTD, 2012; ACTD, 2012). Considering that, according to 2010 figures, the average hotel overnight stay in Istanbul is 2.2 nights and that in Antalya is 5.1 nights (MCT, 2011d), seasonality is an acute problem for the tourism industry, the residents and the tourism employees in Antalya. The hoteliers in the region try to attract MICE (meetings, incentives, conferences and exhibitions) organizations and members of sport teams during the winter months to overcome the seasonality problems. However, seasonality is an inherent characteristic of coastal mass tourism. The cost of developing tourism in Antalya is very high because of the tourism-specific infrastructure cost and under-utilization of facilities during the off-season. The inbound tourism to Antalya increases but the rates and profits are low and the demand fluctuates. The demand of mass tourists is more sensitive to crises and elastic to prices. In contrast, in Istanbul, foreign visitors use the existing urban infrastructure, transport systems, roads and other city facilities and amenities that residents use. Also, accommodation offerings in Istanbul attract MICE organizations during the off-season. The economy of Istanbul is not affected severely, even during crises, because foreigners have a variety of reasons to visit the city. The educated, high-income and experienced city tourists are less affected by economic and political crises. Hence, the inbound tourism demand for Istanbul does not fluctuate much. Moreover, the foreigners who visit the city as their final destination or en route to other Turkish destinations acquire a realistic destination image. The secluded organized mass tourists have a pseudo-destination image of Turkey.

The foreign visitor profiles are different due to the diversity in visitors' motivations and the nature of the tourism products available at each of the two destinations. The contribution of inbound tourism to the economy, cost of tourism development, and the cultural, social and environmental effects of tourism in Istanbul and Antalya are not similar. To illustrate, these two distinct destinations are compared briefly in the below table.

Table 1
Comparison of Istanbul and Antalya as Tourism Destinations

	Istanbul	***Antalya***
Supply		
Infrastructure	Urban, general infrastructure	Coastal, tourism-specific infrastructure
International Air Travel	Scheduled airlines, Turkish-owned private airlines, low-cost airlines	Leisure airlines, Turkish-owned private airlines, low-cost airlines
Distance & Destination	Long-haul, European and other countries Single and multi-destination	Short-haul, Europe Single destination
Resources &	Unique, cultural and man-made Historical, heritage and religion	Standard, sun, sand and sea Facility, resort hotel and holiday village

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Attractions	Museums, monuments and daily city life	Nature, recreation and leisure activity
Image	Destination, city image, favourable and real Created by specialist tour operators	Holiday and pseudo-destination image Created by holiday tour operators
Tourism Products	Organized cultural and heritage tours Independent tours and individual services Business and corporate services Conference and incentive organizations Weekend and city break holidays Diversified, niche products Rich entertainment, night life	Organized all-inclusive holidays Sojourn vacations Orientation tours Optional extra tours Standard packaged product Identikit destination and same product Inauthentic, staged entertainment
Accommodation Type & Organization	City hotel, boutique and special hotel Foreign and local tour operators	Resort hotel and holiday village International tour operators
Travel Organization, Marketing & Sales	Specialist tour operators Local tour operators Different retail distributers	Multinational holiday tour operators Other integrated tour operators Retail travel agencies
Industry Structure	National and autonomous	Multinational, foreign and dependent
Demand		
Volume	Low, sustained and continuous	High, fluctuating and volatile
Origin Countries & Generating Markets	Multiple tourist-generating countries Long- and short-haul markets	A few tourist-generating countries Short-haul market, European countries
Visitor & Tourist Profiles	Educated, independent, city leisure tourists Businesspeople, meeting participants Middle and high-income visitors Less elastic to income, prices and crises Demand directed by specialist operators	Organized mass leisure tourists Low and middle-income holidaymakers Elastic to income, prices and crises Demand created and directed by international holiday tour operators
Seasonality & Length of Stay	Less seasonal Short	Highly seasonal Long
Effects of Tourism		
Economic Effects	Low development costs Beneficial for the city and citizens Product competition, average profit margin Moderate sales volume	High development costs Limited spill-over and induced effects Price competition, low profit margin High sales volume
Other Effects	Encounters between foreigners and citizens Limited social and cultural changes in hosts Damage to physical, historical, archaeological and natural environments	Limited encounters with citizens Social changes in resident population Highly detrimental effects on physical, natural and historical environments

CONCLUSIONS

The structure and characteristics of tourism industry are different in Istanbul and Antalya. They market different tourism products in the international markets. Hence the demand characteristics and foreign visitor profiles of both destinations are distinct. Usually comparisons are made between similar cities such as world cities or European Capitals of Culture. However, the present paper has focused on Istanbul and Antalya with the aim of comparing city tourism and mass tourism within a country-specific context.

Istanbul is a well-known city visited by many different foreigners of various nationalities for culture, leisure, business, meetings, shopping and other purposes. The increase in inbound tourism demand will continue due to the proximity of Istanbul to Europe and its trade links with nearby countries. Istanbul was one of the European Capitals of Culture in 2010 and the city will benefit from this designation in the long run. Istanbul has acquired a very favourable image recently and wide press coverage. Thus, Istanbul competes with other historic capitals such as London, Paris and Rome. The economic benefits of tourism for the city are high. The headquarters of most of the domestic and international tourism companies are located in Istanbul. In this regard, Istanbul controls and shapes both tourism and the Turkish tourism industry. On the other hand, excessive and large-scale investments will continue in Antalya region. Already Antalya airport has been renovated in order to serve the high and increasing volume of both foreign and domestic tourist arrivals. Tourism investments at Antalya have triggered the local tourists' demand. But, the pleasure holidaymakers' demand for Antalya is external and dependent on multinational tourism corporations. Local tourism entrepreneurs comply with the rules of multinational tour operators. The achievement in Antalya is one of growth in sheer volume of tourists rather than a sustainable tourism development. Tourism investments and inbound tourism demand at both destinations will increase. Though so, the present comparison shows that the contribution of city tourism to the

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economy is greater than that of mass tourism. In a few new core demand-generating countries, such as the Russian Federation, Ukraine and Poland, Turkish tour operators are powerful. However, they operate in a fierce price competition environment due to the nature of the identikit product character of the holidays sold. Already, a few Turkish-owned tour operators based abroad have been taken over by multinational tourism corporations. Similar takeovers, mergers and joint ventures will take place in the near future. In such an environment, Turkish tour operators and private airlines should be subsidized. Even in the most liberal economies, governments protect their airlines, even if they are not the national flag carrier.

Turkish tourism policy should be based on promoting profitable differentiated tourism products, such as city tourism products, cultural and heritage tours in the core tourist generating distant countries rather than providing incentives for coastal mass tourism investments. Public tourism authorities should promote Turkey as a culture and heritage destination. Also, creating awareness about Istanbul as an attractive city among potential foreign urban visitors will increase the total tourism demand. The national travel trade firms have the expertise to market Istanbul by blending it with other culture and heritage destinations in Turkey and the nearby countries. The local and specialist tour operators should promote and market Istanbul as a unique city, a distinct entity, modern, living city that is coherent with the images held by foreign visitors. This is the only solution to have a sustainable city and cultural tourism development. A specific body, such as Istanbul Tourist Bureau, could be established by the initiative of both public authorities and private sector tourism organizations for the promotion and marketing of Istanbul. The presented comparison shows that the priority for public tourism policy should be to develop city tourism and cultural tourism. On the other hand, mass tourism investments will continue in accordance with the rules of the liberal market economy. However, continuing to support unsustainable mass tourism through any kind of incentive subsidizes foreign leisure tourists to enable them to have a cheap all-inclusive beach holiday in Turkey to the detriment of the destination and the Turkish economy as a whole. Therefore the funds and incentives that could be provided by the laws should be allocated for developing cultural and city tourism facilities that Istanbul would also benefit from. Finally in the long run, co-operation with the nearby eastern Mediterranean countries such as Egypt, Greece and Adriatic countries for producing and operating joint multi-country culture tourism products would provide benefits for all destinations, the tourism entrepreneurs involved and also the private and public tourism related bodies that take part in such a mutual project.

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