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Turkey's tourism policies in the period of planned development¹

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Abstract

The purpose of this study is to investigate the tourism policies of Turkey in the period of planned development which started in 1963. It is a descriptive study in terms of purpose and a qualitative study in terms of data. The data were obtained from secondary sources and analyzed using descriptive analysis technique. According to the five-year development plans and the Tourism Strategy of Turkey 2023 document, Turkey's tourism policies have been created economically. In particular, the first four plans have often emphasized the economic orientation of tourism and mass tourism. The fifth plan highlighted the diversification of tourism, while the sixth plan highlighted the participation of the local community in tourism. The seventh plan aims to meet the expectations of local people and tourists with a competitive and productive tourism economy. The eighth, ninth and tenth plans have emphasized that the investments paying attention to physical and cultural environment should be supported for spread of tourism all over the country and year. Moreover, in the last three development plans and Tourism Strategy of Turkey-2023 document, the participation of different stakeholders in decision mechanisms and focusing on the tourism types generating more tourism revenue policies have been adopted.

Keywords: Tourism policy; tourism planning; five year development plan; tourism.

1. INTRODUCTION

Although the beginning of modern tourism dates back the middle of the 19th century, its systematic measurement began in the twentieth century (Burkart and Medlik, 1988: 73). Peköz and Yarcan (1998: 2) also state that tourism, which started in antiquity, has gained importance after the industrial revolution and tourism and travel services have improved as a result of the developments gained in transportation. Page and Connell (2014: 1) state that as a global phenomenon, tourism has developed rapidly since 1945, especially in the developed countries of the world. According to the United Nations World Tourism Organization (UNWTO, 2016: 1), 1 billion 184 million people participated in the international tourism movement in 2015 with an increase of 4.4% compared to the previous year, and international tourism revenues increased to 1 trillion 232 billion dollars (\$) with an increase of 3.6%.

Due to its economic contribution to economic benefits and development, many countries have brought themselves to the forefront as tourism destinations towards the end of the twentieth century. For this reason, tourism has been recognized as an important economic sector in addition

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to being included in development policies. However, as one of the important instruments of development tourism has drawn interest in its essence, method, processes, effects, objectives, and outcomes (Sharpley and Telfer, 2014: xi). Burkart and Medlik (1988: 201) state that official tourism organizations are preparing strategies for tourism development because of public issues such as migration control, balance of payments, physical planning and regional planning, hygiene and public security.

The interest of many countries in tourism and the preparation of plans have led Turkey to take action on tourism. The development of tourism in Turkey can be evaluated in two categories: the pre-planned (1923-1962) period and the planned (1963-present day) period. Although prior to the planned period the tourism progresses were so limited, tourism was on the agenda of Turkey. There are a lot of attempts to develop tourism such as establishment of tourism desk in 1934, enactment of Tourism Encouragement Law including tax incentives for local and foreign investors on 22 May 1953 with some incentive elements, establishment of Turkish Tourism Bank in 1957 and establishment of Turban hotels in 1962 by Tourism Bank (DPT, 2007: 6). According to Sözen (2007: 66), during the unplanned period between 1923 and 1962, although there was no significant development in tourism, this period gained required necessities for tourism by appearing in the state organization.

2. Tourism Policy and Planning

Tribe (2010: 7) defines policy as general rules or guidelines that guide behavior. According to Page and Connell (2014: 226), policy indicates the goals and direction of an organization for which it is desired to be followed up for a set period of time. According to Olalı (1990: 23), tourism policy is the development and direction of domestic and foreign tourism in one country in accordance with the general economic policy.

Tourism requires a systematic planning in order to be able to respond appropriately to market demands and to adapt to the general development of the area (Inskeep, 1988: 361). Archer, Cooper and Ruhanen (2004: 98) stated that tourism for a region or country would produce positive and negative consequences and that negative consequences of tourism through conscious policy preparation and planning could be reduced to the minimum level or even eliminated.

Borrelli and Kalayil (2011: 345) state that tourism planning, as it is every plan, is prepared to achieve specific objectives by using existing resources and programs to meet the needs and desires of people. Developing, evaluating and directing tourism supply efficiently to the development of the country's economy can be stated as one of the main objectives of tourism policy and planning (Demirkol and Çetin, 2014: 38).

Burkart and Medlik (1988: 70) argue that the growth and development of tourism in a country or region will lead to a loss of resources due to the seasonal nature of tourism, seasonal unemployment, the overlapping of land use, conflict of interests in visitor and local community demands, and some problems such as economic corruption by stressing the importance of planning. Costa and Buhalis (2006: 1) express that success in tourism, regardless of whether they are micro or macro level, depends on planning, managing and marketing organizations or destinations as a whole.

Planning consists of a set of systematic and interdependent decisions from individual decisions in addition to being of a policy making and decision making type (Hall, 2008: 8). The intent of each plan is to prepare action plans for the foreseeable future and to implement these prepared actions (Gunn and Var, 2002: 3). Cook, Yale and Marqua (1999: 235) state that planning includes the determination of the future, the determination of the objectives for the future achievements and the identification and implementation of the actions necessary to achieve these objectives.

İçöz, Var and İlhan (2009: 91) defines tourism planning as "a process of continuous cycle based on scientific research consisting of directing the tourism system and coordinated guiding activities between the decisions and actions of the organizations to ensure that the system follows

the direction given". According to Timothy (1998: 52), lots of the tourism planning paradigms are inspired by urban and regional planning. These plans usually aim to reduce or even eliminate the adverse effects of tourism and to improve the positive impact of tourism. The UNWTO (2007: 37) states that key players in the tourism industry and appropriate tourism stakeholders must be involved in the preparation of investment or action plans.

İçöz et al. (2009: 28) argue that the most important task and role falls in the state in the planning of the tourism sector due to the fact that the planning areas are generally owned by the public, the planning decisions are taken by the central government and the direct or indirect participation of many units of central government and local authorities in the planning process. In Turkey, the Ministry of Culture and Tourism, established in 2003 with the Law No. 4848 on the Organization and Duties of the Ministry of Culture and Tourism, is responsible for the establishment of tourism policies and plans. Planning is the most basic function that requires the Ministry of Culture and Tourism to play a dynamic brain role in the central organization. The Ministry of Culture and Tourism, in the framework of a proactive management approach, is responsible for identifying the main development trends by continuously monitoring the internal and external conditions under the influence of tourism; presenting possible future scenarios; determining the sector's long and short-term strategic plans, market share, efficiency targets and the tools, standards and actions required to achieve them by taking into account the considerations stated above (DPT, 2007: 47).

3. Literature Review

Ruhanen (2004) conducted a survey on the planning practices of 30 local tourism destinations in the Queensland region of Australia. In this research, it was tried to determine the extent to which sustainability principles, strategic planning and stakeholder participation were taken into consideration in the planning processes of tourism destinations. As a result of the analyzes made, it has been determined that local tourism destinations do not integrate sustainability principles into planning processes.

Burns (2004) reviewed the 20-year tourism development plan of the Solomon Islands, prepared by the South Pacific Tourism Council, covering the 1991-2001 period, with a critical discourse analysis supported by narrative method. As a result of the examination, this plan was evaluated defective in terms of approach (deterministic and narrow-minded) and proposals (tribe, landowners and little emphasis on the complexity of central government).

Teye (1999) made an evaluation of the 15-year Tourism Development Plan covering Ghana's 1996-2010 period. This plan has been prepared so that tourism in Ghana will be the leading sector of the country until 2010. However, Teye points out that there are difficulties in the financing needed for the provision of qualified human resources and general infrastructure, tourism facilities, attractions, marketing and services required in the implementation of this well-planned plan. In addition to these two elements; community support and the active involvement of the community and the limited airline operation that Ghana has, are also other difficulties in implementing this plan.

Moscardo (2011) investigated social representation in tourism planning after paying attention to the difficulty of social and economic activity as well as the integration of a multi-perspective into a harmonious framework for tourism, which is also an area of academic research. In this context, it has been reached that public and private sector representatives are dominant at the point of determining and meeting the needs of tourists, the residents of the destination have a very low level of involvement in the planning of tourism, the public and private sector representatives have given little place to the views of the destination residents. In addition, it has been observed that the majority of tourism plans focus on the economic aspect of tourism and the development plans have little allocated to the non-economic factors of tourism.

McLoughlin and Hanrahan (2016) investigated the environmental plans of the local authorities in Ireland as part of their tourism planning. The development plan of each local

authority unit was analyzed through content analysis. As a result of the analysis, local authorities have prepared plans focused on supporting the measures of area protection and mutual effect between tourism and environment. On the other hand, in these five-year plans that are legally mandatory, the lack of guides which will facilitate the implementation of tourism policies, tourism strategies, budgets and plans prepared in a detailed manner has emerged as the result of the analyzes.

Sharpley (2008) examined Dubai in the Middle East, investing in tourism to save the economy from oil dependence. Although tourism has been directed to reduce dependence on oil, it is stated that tourism development in general and tourism planning in particular are given little importance in Dubai. When Dubai's tourism policies and processes are examined, it seems that a mixed understanding of tourism planning is adopted. On the other hand, tourism development under the control of authoritarian political structure in the emirate also points out possible problems in the future.

Burns (2010) reviewed the Samoan Plan for Samoa, one of the developing small island states, prepared and supported by various units of the World Bank, the European Union and the United Nations. According to Burns, who argued that plans based on the Western approach such as the Samoa Plan covering the period 1992-2001 did not reach the targeted results because of two reasons. The first is the idea that the shortcomings and obstacles in the mainstream of tourism can be abolished with the careful readings of the plans prepared in the 1960s. The other one is the complexity of plans and little consideration of local sensitivities and the inability to balance national plans and regional needs.

In the Five-Year Development Plans, the most prominent elements of the tourism sector are in Turkey (İçöz and Kozak, 2002: 184, İçöz et al., 2009: 35, Dinçer and Çetin, 2015: 174):

- To increase the amount of foreign currency to be obtained from the tourism sector and to benefit from the closing of the balance of payments,
- To increase the number of tourists coming to Turkey,
- To increase the average expenditure of tourists,
- To increase the length of average stay,
- To determine the priority regions in tourism, to complete the infrastructure and physical planning studies,
- To improve the domestic tourism,
- To encourage investments in accommodation and transportation suitable for mass tourism,
- To determine the price policy,
- To ensure that infrastructure investments are made by public and superstructure investments by the private sector,
- To focus on promotional activities,
- To direct incentive and credit policy,
- To eliminate negative effects of tourism,
- To ensure the protection of natural values,
- To encourage foreign investments,
- To determine the main tour routes,
- To determine tourism education policy,
- To bring tourism statistics into a reliable state,
- To ensure diversification of tourism,
- To increase the quality of products and services,
- To open public camps and second homes to tourism.

Wattanacharoensil and Schuckert (2014) have examined the creative tourism practices in Thailand's master plans and policies. How the Thai government and relevant agencies and agencies can contribute to the national tourism development of the country has been researched within the

framework of the Thai Tourism Agency's branding campaigns. The content analysis of qualitative methods was used to examine plans prepared by selected government departments. According to the analysis results, supporting human resources and tourism entrepreneurs, promoting Thai cultural capital, cooperating with other creative sectors to promote Thai culture, promoting cultural activities related to tourism, incentives for creative cities are listed in order to support creative tourism in all plans.

Wan and Pinheiro (2014) examined Macau's tourism planning approach, which demonstrated rapid urban change and economic development through the liberalization of casino licenses and individual visit arrangements, and tried to determine whether this planning approach adopted was keeping up with this rapid change. According to the results of the survey, the tourism planning approach adopted does not react fast enough to the rapid change mentioned above. The shortcomings of this planning approach are; the lack of legislation on planning, the lack of detailed guidelines leading to development, weak coordination among government departments, the lack of expertise and knowledge in planning, the lack of clear vision that reflects the city's location and the concentration of planning power in the hands of a few official government representatives.

Scuttari, Lucia and Martini (2013) analyzed the tourism traffic in southern Tyrol in Italy for integrated planning for sustainable tourism and travel. The research was conducted to emphasize that the traffic should be included in destination planning and management. The research show the following results; annual, seasonal, monthly and daily distribution of tourist and daily vehicles; an assessment of the environmental impact of the domestic tourism mobility in the destination, an exploratory analysis of the effects of the mobility management measures targeting sustainable tourism in selected pilot areas.

Ruhanen, McLennan and Moyle (2013) have examined 28 national tourism strategies and plans prepared for a 10-year period covering Australia's 2000-2009 period by content analysis technique. Within the scope of the review, the 20 most important strategic themes for Australian tourism have been identified. According to the analysis results, in the 28 documents, it was seen that the theme that was mostly discussed was marketing with 11%. The marketing is followed by research with 9%, policy and planning with 9% and infrastructure and investment with 8%.

Lai, Yiping and Xuegang (2006) investigated the process of tourism planning and the implementation of the prepared plan through the Chinese sample. In this context, the researchers studying a 3-year section of the 2001-2020 Guniujiang Tourism Development Master Plan have found a gap in seven categories between planning and implementation; defects in the main plan, inadequate research and analysis knowledge of the planner, inadequate forecasting of the planner, lack of experience of the planner, misunderstanding of the practitioner, disagreements between the practitioner and the planner, imbalanced development and private sector investment difficulties in China.

Sözen (2007) examined the contribution of tourism policies applied in Turkey to the tourism of Çanakkale and the development of tourism in the process covering the period 1982-2006. In this context, tourism incentive measures and the practices in Çanakkale in terms of tourism policy; promotion and marketing, employment, environmental planning activities and tourism education in terms of tourism diversification have been investigated. As a result of the investigation, the number of certified facilities increased from 85 in 1982 to 177 in 2005, Çanakkale's share in total tourism investments was 0.93%, transportation development was slightly improved, tourism diversification was emphasized, education and environmental issues also improved determinations were made.

According to Demir (2014: 116) examined Turkey's promotion policies in the Five-Year Development Plans and Tourism Strategy of Turkey-2023, tourism and in particular promotion were not paid attention too much in the first seven five-year development plans. These plans focused on the number of tourist arrivals, how much tourism revenue will be gained and the goals of bed capacity in the next five years, after a few sentences have been introduced.

4. Research Methodology

4.1. The Purpose and Importance of Research

The purpose of the research is to determine the official tourism policies of Turkey in the context of the Development Plans prepared since 1963, which is considered as the beginning of the planned period, and Turkey Tourism Strategy 2023 prepared specifically for the 100th anniversary of the founding of the Republic of Turkey.

This research is important from the point of view that it examines the point of view of Turkey as a state representing all stakeholders rather than an enterprise representing the expectations and targets of the private sector in tourism. At the same time, providing a comprehensive evaluation and comparison to the Development Plans and the Tourism Strategy of Turkey-2023 makes it important. Thus, both the enterprises representing the private sector and the NGOs, local governments, professional organizations and the local community affected and/or influenced by tourism as well as researchers who are interested in tourism are able to examine the official tourism policies and plans of Turkey as a public policy.

4.2. The Research Question and Scope

"What are the official tourism policies of Turkey in the planned period?" is the main question of this research. The scope of the research is the official tourism policies of Turkey in the period between 1963, the beginning of the planned development period, and 2023, the 100th anniversary of the Republic of Turkey. In terms of data used (DPT, 1963, 1968, 1973, 1979, 1985, 1990, 1995, 2000, 2006, 2007; Ministry of Development, 2013, 2016); The first Five-Year Development Plan [FYDP] (1963-1967), the second FYDP (1968-1972), the third FYDP (1973-1977), the fourth FYDP (1979-1983), the fifth FYDP (1985-1989), the sixth FYDP (1990-1994) (1996-2000), the eighth FYDP (2001-2005), the ninth Development Plan [DP] (2007-2013), the tenth DP (2014-2018) and Tourism Strategy of Turkey-2023 documents were included. Ten of the documents are development plans and one strategy document prepared within the scope of strategic planning. 1978, 1984, 1995 and 2006 were not included in any development plan. In the given years, annual and investment programs have been prepared.

4.3. Data Analysis

Document analysis is one of the most commonly used data collection techniques in qualitative research (Yıldırım and Şimşek, 2008: 89). Documentary source review is the collection and investigation of various written and visual materials or documents prepared by other persons or institutions about the subject (Seyidoğlu, 2009: 46). In content analysis that Balci defines as translating written and oral materials into numerical data, appropriate categories are prepared for the purpose of study and the data is digitized as follows (1995: 215-218):

1. Using a simple binary encoding to show whether the category appears in the document,
2. Showing the frequency of the category in the document,
3. The space of the category allocated in the document and
4. The power or intensity of the representation of the category.

Table1. Frequency Analysis of Tourism in Development Plans

Plans	Section/Title	Page	Paragraph	Line
FYDP I	1	4	23	79
FYDP II	1	10	37	117
FYDP III	1	8	25	111
FYDP IV	1	5	26	90
FYDP V	1	2	9	27
FYDP VI	1	2	12	32
FYDP VII	1	3	24	70
FYDP VIII	1	4	32	182
DP IX	1	2	11	42
DP X	1	2	13	96

In Table 1, there is frequency distribution of the area allocated to "tourism" in development plans. However, neither the titles, tables, figures, tables and figures explanations nor the tourism evaluations in other areas which are not independently under the tourism heading are included in the frequency analysis. On the other hand, the reports of Tourism Specialization Commission and the Tourism Strategy of Turkey-2023 are prepared only for tourism, so these documents are excluded from the frequency analysis because all of the documents do not include other areas.

Tourism has been included in all development plans either as an independent chapter or as a title. The space allocated to tourism in terms of pages is 27 pages in the first four plans covering the period 1963-1983, 11 pages in the next four plans covering the period 1985-2005 and only 4 pages in the last two plans covering the 2007-2018 period. When considered in terms of paragraphs, at most 37 paragraphs in the Second FYDP and at least 9 paragraphs in the Fifth FYDP have been allocated to tourism. When evaluated in terms of line, at most 182 lines in the Eighth FYDP and at least 27 lines in the Fifth FYDP have been allocated to tourism. However, because of the use of two-column pages in the Eighth FYDP, the line lengths are shorter than the lines in the other plans.

4.3.1. Tourism Policies of Turkey in the First FYDP

Only 4 pages were allocated to tourism under the heading of services in the sixth chapter of the first FYDP prepared for the years 1963-1967. This plan has been set as the main principle to make the investments necessary for tourism, which is seen as a very important tool in Turkey's balance of payments, in a short time, especially in places where tourism is convenient.

Important projects related to tourism are as follows: establishment of holiday villages and camping areas; some trial projects; establishment of national parks; developing all kinds of transportation with the Balkans, Greece, Italy and Israel and completing the tourist route called pilgrimage route. Under the heading Measures, the precautions to be taken in order to achieve the planned targets are stated in 13 items. These measures include; good propaganda, establishment of an organization to fulfill tourism activities, establishment of a tourism development board for cities and towns, increasing of tourists' stay, providing convenient loans for touristic facilities by tourism bank, change of laws and regulations preventing development of tourism, arrangement of festivals in specific places and times, training of personnel in tourism, tax exemption for new hotels and motels, opening of public rest facilities to tourists, promotion of tourist attractions, establishment of complementary businesses in places where touristic facilities are intensive and ensuring that natural values are used without allowing speculation in tourism.

4.3.2. Tourism Policies of Turkey in the Second FYDP

In the tenth part of the second FYDP prepared for 1968-1972, 10 pages were allocated to tourism. Under the heading of the principles; it was determined as an essential principle in tourism policy to take full advantage of all economic, social and cultural functions of tourism.

With regard to tourism investments, according to the calculations made and the tourism policy to be followed; it is planned that 87% of the facility investments will be allocated to enterprises suitable for mass tourism.

In the section of policy measures, Ministry of Tourism and Promotion goes to an organization which will continue only tourism activities, promoting Turkey by this ministry, paying attention to environmental health and food control to improve tourism activities, increasing tourism credits, establishment of education and training center, evaluation of priority areas in tourism investments, making international partnership with Mediterranean countries, giving more importance to relation between transport and tourism activities and protection and restoration of natural, historical and archaeological values by prioritizing places where touristic enterprises concentrate on.

4.3.3. Tourism Policies of Turkey in the Third FYDP

In the sixth chapter of the fourth section of the third FYDP prepared for the years 1973-1977, there are 8 pages related to tourism. In the planned period, it is stated that the goals such as the number of tourists, tourism income and the capacity of the accommodation were not achieved, but the growth was above the world average.

As it is in the first and second plans, the distribution of tourism investments throughout Turkey is considered inefficient on this plan. For this reason, it is adopted that investments in the field of tourism should be supported in Mediterranean, Göreme, Uludağ, South Aegean and Marmara regions. Moreover, it has been stated that the needs of the loan cannot be met adequately, the tourism enterprises are not opened enough in the planned regions and the personnel are insufficient in terms of quantity and quality. In this period, it is estimated that tourism enterprises will need 27 thousand employees, so it has been decided that a program should be prepared for the training and employment of these personnel.

Under the heading of the Principles and Measures, it is determined as main principle that investments, promotion activities, all organizations related to tourism should be in line with mass tourism. It put emphasis on physical planning in the areas where tourism is rapidly developing in order to prevent the unsteady development of tourism businesses. In this regard, the Ministry of Development and Housing and the Ministry of Tourism and Promotion have agreed to work together. It is planned to prepare legislations to ensure that the coasts are used and protected for the benefit of society. This plan also includes taking the necessary precautions for the development of social tourism and the provision of loans by other banks in addition to Tourism Bank. It has also been decided that in the training of personnel, skill training should be given instead of academic education.

4.3.4. Tourism Policies of Turkey in the Fourth FYDP

The fourth FYDP prepared for the years 1979-1983 included 5 pages for tourism in the fourth chapter of the third section. In this period, the establishment of facilities suitable for mass tourism was adopted as a principle and it was decided to develop "Tourism Zones" in order to achieve the goals in the targeted direction and time.

Under the heading of principles and policies, it is emphasized that mass tourism is a priority in the implementing of the tourism sector. It has been adopted that the public should be more active in every aspect of tourism. In addition to encouraging foreign investors, it is also planned to make easy for employment of foreign personnel. It is stated that tourism facilities belonging to public institutions will be managed from one center and the cost is not covered except for the establishment phase.

It is also emphasized that the necessary measures to meet the holiday needs of the employees are taken. Moreover, in this plan, providing the use of sea, lake and river shores for the benefit of society, the necessity of currency exchange in regard to the number of days, the prevention of seasonal development of tourism, improving of tourism statistics and revising the policy of tourism education.

4.3.5. Tourism Policies of Turkey in the Fifth FYDP

In the fifth FYDP prepared for the years 1985-1989 only 2 pages were allocated to tourism under the heading of services in the third chapter.

Under the headings of the Principles and Policy, it has been adopted that the natural, historical and cultural values of Turkey should be developed in line with the principles of preserving the ecological balance, winter sports, hunting, water sports, festivals, health tourism, youth tourism and other tourism potentials keeping the environment clean and healthy. As the importance of mass tourism continues to be emphasized, the importance of individual tourism has been adopted as a principle and policy.

Using modern techniques in tourism statistics, the provision of suitable holiday facilities for employees, the disbursement of funds instead of direct investment by the Tourism Bank, and the integration of protection strategies and development strategies so that natural and cultural environmental resources are not harmed by tourism are other policies stated in this plan.

4.3.6. Tourism Policies of Turkey in the Sixth FYDP

In the sixth FYDP prepared for the years 1990-1994 only 2 pages including objectives, principles and policies were allocated to tourism under the heading of services in the third chapter.

Under the heading of Principles and Policies following issues are stated in the tourism sector; development of incentive policies that will make 3rd age tourism more attractive, bringing the service sector to a sufficient level in quantity, improvement of infrastructure and superstructure in quantity and quality, planning of tourism investments by protecting cultural and natural heritage, development of charter transportation, promotion of family business, provision of vacationing of the society in appropriate and healthy conditions, increasing occupancy rates and extension of tourism season.

4.3.7. Tourism Policies of Turkey in the Seventh FYDP

In the seventh FYDP prepared for the years 1996-2003 pages were allocated to tourism under the heading of structural change projects aiming to increase the efficiency of the economy in the third chapter.

Under the heading of objectives, principles and policies, a competitive and productive tourism economy, satisfying expectations of local people and tourists, the diversification and continuity of natural and cultural resources (sustainability) are highlighted as main goals. It is emphasized that monitoring changing consumer expectations and the development of tourism types such as golf, winter, mountain, plateau, thermal, health, yacht, caravan, cruise, congress and entertainment tourism will prevent the concentration of tourism in certain season and regions.

Participation of local authorities and people in decision making, prevention of unintended use of physical plans, prioritization of small scale enterprises, development of domestic tour operators, continuation of Mediterranean-Aegean Tourism Infrastructure and Coastal Management [ATAK] project, application of the “polluter pays” principle, implementation of the strategic master plan for long-term and balanced development, adoption of the certification system and establishment of organizations for the marketing of secondary housing are among the other policies highlighted in the seventh plan.

4.3.8. Tourism Policies of Turkey in the Eighth FYDP

Under the heading of tourism and promotion 4 pages were allocated to tourism in the eighth FYDP prepared for the years 2001-2005.

Under the headings of objectives, principles and policies; it has been underlined that tourism should be promoted in all areas and potential regions, tourism investments should be carried out with a protective and developing approach to natural, historical and social environment, it should be given priority to tourism marketing and total quality instead of business investments.

Implementation of the Tourism Sector Master Plan [TUSAP], researching new markets outside the European countries in the world, supporting small scale enterprises, development of sustainable tourism in the ecologically sensitive national parks, and development of the tourism industry in Turkey, encouraging ecotourism are among the other policies underlined in the eighth plan.

4.3.9. Tourism Policies of Turkey in the Ninth DP

Under the heading of services 11 paragraphs were allocated to tourism in the ninth DP prepared for the years 2007-2013. It is stated that all investments in the field of tourism sector which can provide economic and social development by eliminating the welfare and developmental imbalances of Turkey should focus on promoting, marketing, infrastructure, tourism education and environmental issues by adopting a protective and developing approach to natural, historical and social environment.

The ninth DP also focuses on the economic aspect of tourism as it is in other plans. Economic concepts such as tourism income, contribution to balance of payments, contribution to employment, added value, average tourist spending and tourism expenses have been frequently used in this plan.

In order to prevent seasonal and regional concentration, it has been stated that tourism should be directed to golf, winter, mountain, thermal, yacht, congress tourism and ecotourism. Besides, underlining the importance of health tourism in terms of price, service quality and geothermal resources, giving tourism incentives to marketing, airlines and total quality improvements, standardization in tourism education and preparation of Tourism Sector Master Plan are among the other policies stated in the ninth plan.

4.3.10. Tourism Policies of Turkey in the Tenth DP

Under the heading of Innovative Production and Stable High Growth 2 pages were allocated to tourism in the second chapter of the tenth DP prepared for the years 2014-2018.

Turkey's tourism policies are included in paragraphs between 872 and 877 in the tenth DP. When these paragraphs are examined, the diversification of tourism in Turkey is emphasized and it is stated that health tourism is one of the tourism types that should be focused on. Although congress tourism, winter tourism, cruise tourism, golf tourism and culture tourism are emphasized as alternative tourism types, it is stated that they do not have sufficient infrastructure facilities.

Destination management, efficient promotion activities in international area, the participation of the local people as well as local authorities and NGOs in decision making, qualified tourism personnel, adopting the responsible tourism approach to the environment and the socio-cultural structure are the other tourism policies specified in the tenth plan. The policies mentioned are also important because of the fact that they show the area where tourism is affected. Provision of participation of all stakeholders in a decision to be taken at any tourism destination will minimize the likelihood of future conflicts.

4.3.11. Tourism Policies of Turkey in Tourism Strategy of Turkey-2023

Turkey Tourism Strategy of Turkey-2023 and the Action Plan covering 2007-2013 period, was published in the Official Gazette dated 02.03.2007 and numbered 26450. In the document, vision statement is as following (Ministry of Culture and Tourism, 2007):

With the adoption of sustainable tourism approach tourism and travel industry will be brought to a leading position for leveraging rates of employment and regional development and it will be ensured that Turkey becomes a world brand in tourism and a major destination in the list of the top five countries receiving the highest number of tourist and highest tourism revenues by 2023.

Looking at the vision statement, it seems that sustainability is the first goal. However, in the rest of the vision statement; employment, regional development, number of tourists, tourism income and branding are emphasized and it is remarkable that they focus on the economic dimension of tourism. It is seen as an important shortcoming that the socio-cultural, social and environmental aspects of tourism are not included in the vision statement. It is thought that using the terms such as socio-cultural, socio-economic, social structure, historical values and environment will be more appropriate approach instead of economic terms.

Table 2. Strategies for Strengthening Turkey's Tourism Industry

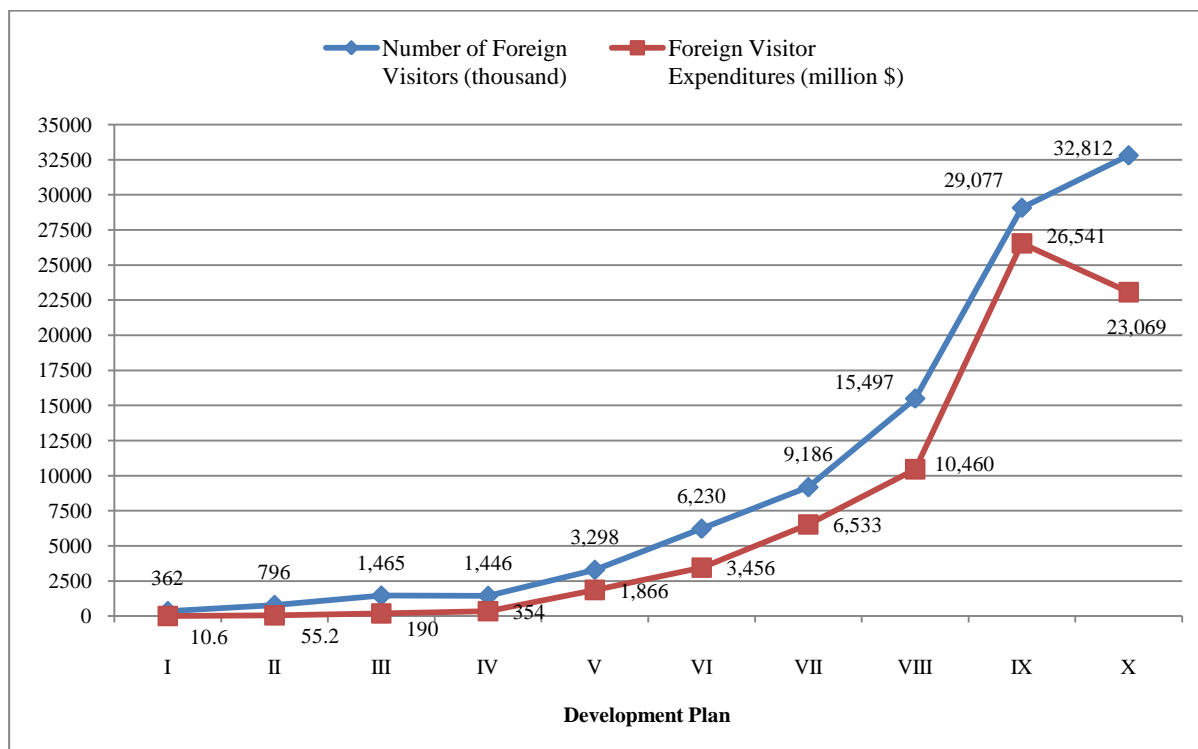
Field	Strategy
Planning	"To exhibit a planning approach that supports economic growth, is physically applicable and socially oriented and fairly reflects the principle of sustainable tourism."
Investment	"To boost tourism investments by designing incentive schemes that would make tourism investment projects economically feasible and viable."
Organization	"To achieve institutionalization through councils to be established at national, regional, provincial and local levels within the context of 'Good Governance', to ensure full and active participation of tourism sector as well as all related public and private entities and NGOs in relevant decision-making process."
Domestic Tourism	"To provide an alternative tourism products based on acceptable quality and affordable prices to various groups in the society."
Research and Development	"To ensure top prioritisation of R&D efforts in tourism industry among public and private sector and tourism organizations."
Transportation and Infrastructure	"To eliminate transportation and infrastructure problems of densely populated and fastest growing tourism centers."
Marketing and Promotion	"To commence with marketing and promotion activities at each destination, in addition to the national marketing and promotion campaigns with the ultimate objective of branding on a national, regional and local state."
Education	"To set up and introduce an education program in tourism, which would yield measurable outcomes."
Quality of Service	"To activate Total Quality Management in every constituent of the travel industry."
City Branding	"Manage branding of cities rich of cultural and natural heritage and thereby convert them into a point of attraction for travellers."
Tourism Diversification	"To develop means for alternative tourism types led particularly by health, thermal, winter, golf, sea tourism, ecotourism and plateau tourism, conference and expo tourism activities."
Regions to Host Rehabilitation Efforts for Tourism Areas	"To make arrangements for handling in the first place and strengthening the infrastructure of areas where mass tourism activities grow intense and for extending tourism season throughout the entire year in these regions."
Tourism Development Zones	"To use tourism as a key tool for local and regional development in tourism development areas encompassing more than one cities to be transformed into destinations."
Tourism Development Corridors	"To develop a certain route for tourism on definite themes, by rehabilitating historical and natural texture."

Source: Ministry of Culture and Tourism, 2007.

Table 2 shows the strategies for tourism objectives that Turkey wants to reach until 2023. When the strategies are generally evaluated; diversification of tourism and extending tourism season, taking into account the qualifications in tourism supply, improvement of existing tourism areas as well as new areas with sufficient resources, taking more concrete steps in institutionalization, taking necessary precautions for development of domestic tourism and carrying out planned investments have come into prominence. Most, not all of them, of the issues stated above are included in all plans prepared and implemented from the beginning of the planned development period. However, due to the difficulties in reaching the targets, the same issues and targets are repeated in each strategic document. One of the biggest challenges of reaching the targets is the need for collaboration and coordination of many types and sectors of industry related to tourism industry directly or indirectly. Another one is that tourism industry requires interdisciplinary researches and studies academically.

4.3.12. Economic Indicators of Tourism in the Planned Period

As a developing country, Turkey aims to benefit from tourism especially economically. In this context, Graph 1 and Graph 2, which show the average of each of the 10 development plans covering the period between 1963 and 2018, show the economic indicators such as the number of foreign visitors, the expenditures of foreign visitors, the ration of tourism revenues in GDP, and the ratio of exports.



Graph 1. The Number of Foreign Visitors and the Expenditures of Foreign Visitors Visited Turkey in the Planned Period

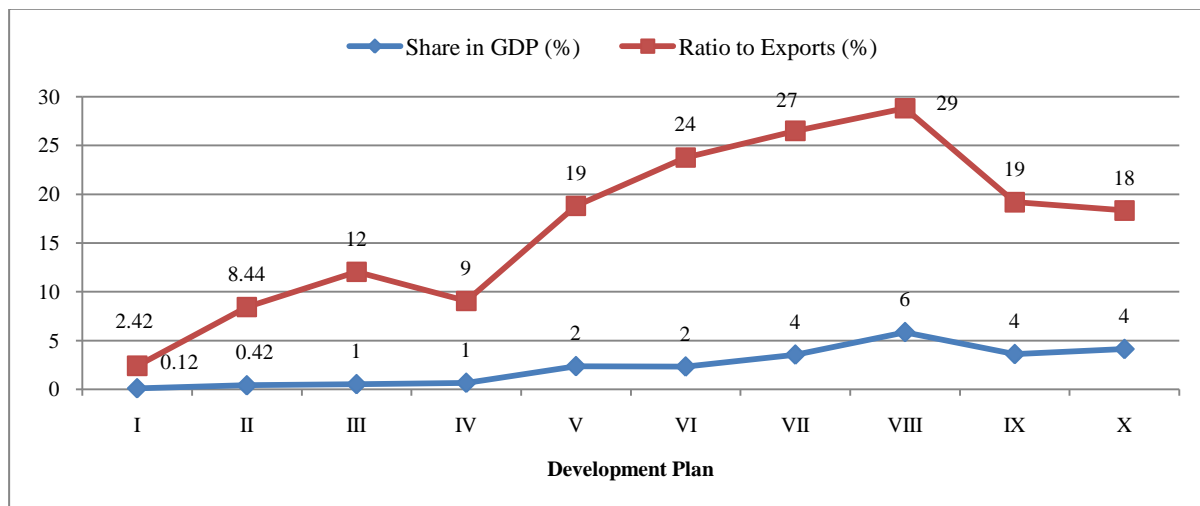
Source: Ministry of Culture and Tourism, 2016; TÜRSAB, 2015; 2016.

When Graph 1 is evaluated in terms of the number of foreign visitors visited Turkey on average, 362 thousand tourists in the first period, 796 thousand tourists in the second period, 1 million 465 thousand tourists in the third period, 1 million 446 thousand tourists in the fourth period, 3 million 298 thousand tourists in the fifth period, 6 million 230 thousand tourists in the sixth period, 9 million 186 thousand tourists in the seventh period, 15 million 497 thousand tourists in the eighth period, 29 million 77 thousand tourists in the ninth period and 32 million 812 thousand tourists in the tenth period visited Turkey. As it can be seen, the number of foreign visitors in the planned period except for the fourth period has continuously increased. It is thought that the military coup on 12 September 1980 has caused to stop the increase of the number of foreign visitors that is the near 100% increase in the second and third periods. The upward trend continued in the following period. In the fifth and sixth periods, there was an increase of nearly 100%, while in the seventh period there was an increase of 50%. The reason for the slowing in this period (1996-2000) is thought to be security concerns arising from Marmara earthquakes and PKK terrorism. In the eighth period, the increase rate was close to 70% and in the ninth period it was close to 90%. In the tenth period (2014-2018), the rate of increase recorded a large decline with 10%. The tenth period data covers the years 2014, 2015 and 2016. The 36.8 million people reached in 2014 and 2015 declined to 25.3 million in 2016 with a large decline. It is thought that the main reasons for this decline are; a Russian aircraft shot down by Turkey in October 2015 and Turkey has strained relations with the EU countries.

When Graphic 1 is evaluated in terms of tourist expenditures of the foreign tourists visited Turkey on average, Turkey's tourism revenues are as following: \$10.6 million in the first term, \$55.2 million in the second period, \$190 million in the third period, \$354 million in the fourth period, \$1 billion 866 million in the fifth period, \$3 billion 456 million in the sixth period and 6 billion \$533 million, \$10 billion 460 million in the eighth period, \$26 billion 541 million in the ninth period and \$23 billion 69 million in the tenth period. As you can see, the amount of expenditure made by foreign tourists in the planned period except for the tenth period has continuously increased. On

the other hand, when it is evaluated in terms of expenditures per tourist throughout the planned period, the averages are as following: \$29 in the first period; \$69 in the second period; \$129 in the third period; \$245 in the fourth period; \$566 in the fifth period; \$555 in the sixth period; \$711 in the seventh period; \$675 in the eighth period; \$913 in the ninth period and \$703 in the tenth period. The amount of tourist expenditure per tourist is showing an unstable outlook with ups and downs since the fifth period.

Graph 2 shows the share of tourism revenues in Turkey's GDP and the ratio of tourism revenues in Turkey's exports in the planned period. When evaluated according to its share in GDP, the share of tourism in Turkey's GDP is as following: 12‰ in the first period, 42‰ in the second period, 1‰ in the third and fourth periods, 2‰ in the fifth and sixth periods, 4‰ in the seventh period, 6‰ in the eighth period and 4‰ in the ninth and tenth periods. It is thought that it is important that the share of tourism revenues in the GDP is 1-2‰ for a developing country like Turkey. The higher the share in GDP, the higher the deterioration of Turkey's economic structure due to the outbreak of any economic, political, international relations, war and natural disaster that will impact tourism. In this context, the low share of tourism revenues in GDP is crucial for tourism dependence. The tension emerged in October 2015 with Russia is the clearest example of this situation.



Graph 2. The Share of Tourism in Turkey's GDP and the Ratio of Tourism Revenues in Turkey's Export
Source: Ministry of Culture and Tourism, 2016; TÜRSAB, 2015; 2016.

Moreover, when tourism revenues are analyzed in terms of the ratio of exports, Graph 2 shows that the rate of 2.42% in the first period was 8.44% in the second period, 12% in the third period, 9% in the fourth period, 19% in the fifth period, 24% in the sixth period, 27% in the seventh period, 29% in the eighth period, 19% in the ninth period and 18% in the tenth period. Tourism revenues are important because Turkey's export revenues are less than import expenditures. Hence, the revenue from tourism plays an important role in closing Turkey's balance of payments. The decline in tourism revenues, especially during the ninth and tenth development periods, also leads to an increase in the balance of payments deficit.

5. Conclusion

During the first four planned periods of Turkey, policies were generally prepared to develop and improve the tourism infrastructure. During these periods, it seems that the focus is on the economic impact of tourism. Tourism income and the number of tourists stand out as the most discussed topics. Furthermore, in this period, policies for mass tourism were adopted and promotion and marketing activities were also prepared for mass tourism. Infrastructure and

superstructure targets such as the number of accommodation facilities, bed and room capacity, airport, highway, water-sewerage and communication were also kept in the first 20 years of the planned period.

In the fifth plan, diversification of tourism, determination of high-income tourists as target market, orientation to alternative tourism types and ecotourism have been brought to the agenda due to the fact that the infrastructure of tourism and the superstructure reached a certain level. In the sixth plan, there are policies for community involvement in tourism mobility and family business, improving diversity and quantity of tourism as well as quality. With this period, tourism has frequently appeared in the plans, not only in the positive aspects but also in the negative aspects.

In the seventh, eighth, ninth, and tenth plans, tourism policies areas follows: competitive tourism, sustainable tourism, efficient tourism economy, diversification of natural and cultural resources, meeting the expectations of local people and tourists, development of different tourism types, participation of local people and authorities in decision making, improvement of the quality of tourism education, implementation of the tourism master plan, qualified tourism personnel, protecting and improving the physical, social, and cultural environment.

In conclusion, we can say that in the planned development period of Turkey, tourism developed with great acceleration compared to the unplanned period. However, at this point, it should be noted that the world tourism market has also grown in parallel. Today, Turkey is one of the leading countries in international tourism movement in the world. Furthermore, it can be considered as an advantage that the accommodation facilities are newer than the rival countries such as Spain and Italy in the Mediterranean Region. On the other hand, in terms of tourism income, diversification of tourism types and regions the targets specified in the plans have not been achieved.

It is necessary that quality issue should be focused and examined in a separate plan in order to improve at the desired level. Firstly; a situation analysis should be done in order to take necessary steps and improve the existing tourism facilities, tourism legislation, tourism education, tourism employees, quality of service, professional associations, target markets, target groups, tourism investments, natural and cultural resources.

The situation analysis should not be done only for the purpose of listing quantitative values such as number of facilities, hotels, agencies, restaurants, historical buildings, and museums. It is necessary to investigate whether there is a change in Turkish family structure, how young people are affected, how Turkish language is influenced, whether natural and cultural resources are damaged due to tourism. This is an important and long-term process that should not be underestimated. Therefore, it is too difficult to carry out the activities in addition to these efforts simultaneously to further increase the demand for tourism. Turkey needs to reach an effective result in Turkish tourism by using its resources effectively and efficiently.

It will be useful to take the necessary regulatory, supervisory and protective measures to ensure that Turkey's tourism, both in its present situation and in the future, will be ready or at least affected by unforeseen circumstances that will erupt in the following areas:

1. Diversification of tourism in terms of type, time and tourism destination without putting off mass tourism,
2. The protection of the elements of social construction such as tradition, custom, family, language, religion, clothing style, lifestyle,
3. Protection of the physical environment,
4. Calculation of the economic, social, cultural and physical carrying capacities of the area to be opened for tourism,
5. Establishment of strong and effective Turkish tour operator enterprises in order to reduce dependency on foreign tour operator,
6. Planning successful promotional campaigns to improve Turkey's global image,
7. The development and dissemination of supportive practices for domestic tourism,

8. To realize that tourism and culture are different but complementary areas,
9. Local governments should undertake more duties and responsibilities in tourism,
10. Adoption of the principle of continuous improvement in service quality,
11. Encouraging the recruitment of qualified personnel by introducing a limit in the practice of internships in tourism facilities,
12. Adoption of governance approach in tourism,
13. Gaining effective results by more efficient operation of the control mechanism and
14. Focusing on Turkey tourism by discontinuing some disagreements among professional associations.

The tourism industry has emerged in order to meet the needs and expectations of the individuals involved in tourism movement, both during and after their participation in this movement. On the other hand, the fact that the individuals participating in the tourism movement are in a very different social, economic, cultural and political environment and the tourism industry has a complex structure shows importance in terms of the scale that tourism affects. Therefore, tourism should be regulated and controlled by tourism policy and planning. The preparation and implementation of the plans in which all the elements and factors mentioned are taken into consideration are not an option but a necessity.

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