MARKETING CITIES FOR TOURISM: DEVELOPING MARKETING STRATEGIES FOR ISTANBUL WITH LESSONS FROM AMSTERDAM AND LONDON

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ABSTRACT

The tourism sector is relatively competitive, with many destinations competing with each other to attract potential tourists. Destinations, such as urban areas, need to be sold with a greater emphasis on marketing activities. In fact, as a bundle of products consumed by a range of tourists with different needs and motives for visiting, urban tourism destinations differ from traditional holiday resorts and require more specific attention from tourism organisations responsible for marketing their cities. This research focuses on these tourism organisations and their marketing activities ranging from market research to advertising. Attention is also paid to the tourism sector as an initiative to alleviate the urban areas' problems. The concept of an urban tourism destination as a marketable product is assessed with particular reference to the case study cities of London, Amsterdam and Istanbul.

Extensive literature review, in-depth interviews with key personnel and field studies were held in the case study cities as the main research methods of the investigation. Information on marketing plans of the cities; structural characteristics of tourism organisations both in the public and private sectors; marketing alliances between these organisations; marketing tools used by city destinations; the competitiveness of urban areas in the both international and domestic tourism markets are sought from the findings of the research methods. In addition, product life cycle analysis, carrying capacity analysis and SWOT analysis are applied to the cities with support of existing data in order to assess the urban tourism products in detail. It is anticipated that such a comparative study will shed some light on the marketing activities of tourism organisations and will help to develop optimal marketing strategies for the urban tourism product of Istanbul.

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ABBREVIATIONS

ABTA:	Association of British Travel Agents
ACB:	Amsterdam Convention Bureau
ALG:	Association of London Government
ALVA:	Association of Leading Visitor Attractions
AMPRO:	Amsterdam Promotion Foundation
ANVR:	Association of Dutch Travel Agents and Travel Organisers
ANVV:	Association of Dutch Tourist Boards
ANWB:	Royal Netherlands Tourist Association
APTG:	Association of Professional Tour Guides
AUB:	Amsterdam Culture Bureau
BACD:	British Association of Conference Destinations
B&B:	Bed and Breakfast
BHA:	British Hospitality Association
BITOA:	British Incoming Tour Operators Association
BRC:	British Retail Consortium
BTA:	British Tourist Authority
BTSM:	British Tourism Survey - Monthly
CDI:	City Development Index
CoA:	City of Amsterdam
DCMS:	Department for Culture, Media and Sports
DIE:	National Institute of Statistics
DNH:	Department of National Heritage
DoE:	Department of Employment
EFCT:	European Federation of Conference Towns
ETB:	English Tourist Board
ETC:	English Tourism Council
FECTO:	Federation of European City Tourism Offices
GDP:	Gross Domestic Product
GLA:	Greater London Authority
GLC:	Greater London Council
HU:	Hermeneutic Units (in ATLAS.ti)
IACVB:	International Association of Convention and Visitor Bureaux
IBB:	Greater Istanbul Municipality

ICVB:	Istanbul Convention and Visitors Bureau
IGO:	Istanbul Governor's Office
IKSV:	Istanbul Culture and Arts Foundation
IOBC:	Istanbul Olympic Bidding Committee
IOC:	International Olympic Committee
IPS:	International Passenger Survey
IT:	Information Technology
ITD:	Istanbul Tourism Directorate
JLTF:	Joint London Tourism Forum
LDA:	London Development Agency
LTA:	Leading Tourism Authority
LTB:	London Tourist Board
LTBCB:	London Tourist Board and Convention Bureau
MICE:	Meeting, Incentive, Conference and Exhibition
MvEZ:	Ministry of Economic Affairs
NBT:	Netherlands Board of Tourism
NBTC:	Netherlands Board of Tourism and Conventions
NEDC:	National Economic Development Council
PATA:	Pacific Area Travel Association
RDA:	Regional Development Agency
RTO:	Regional Tourism Organisation
STR-AVN:	Dutch Tourism and Recreation Foundation
SWOT:	Strengths, Weaknesses, Opportunities and Threats
TCKTB:	Ministry of Culture and Tourism
TIC:	Tourist Information Centre
TNH:	Tourism North Holland
TOS:	Tourism Opportunity Spectrum
TRN:	Tourism Recreation Netherlands
TUGEV:	Tourism Development and Education Foundation
TUROB:	Turkish Hotel Association
TURSAB:	The Union of Turkish Travel Agents
TUTAV:	Promotion Foundation of Turkey
TUYED:	Tourism Journalists and Authors Association
TYD:	Turkish Tourism Investors' Association

TZ:	Tourist Zone
UKTS:	United Kingdom Tourism Survey
VAT:	Value Added Tax
VFR:	Visits to Friends and Relatives
VLL:	Visit London Ltd.
VVV:	Amsterdam Tourist Board
WTO:	World Tourism Organisation
WTTC:	World Travel and Tourism Council

LIST OF CONTENTS

Page

CHAPTER 4. ISTANBUL: A GLOBAL CITY

CHAPTER 5. METHODOLOGY

CHAPTER 7. MARKETING AMSTERDAM, LONDON AND ISTANBUL FOR TOURISM

CHAPTER 8. CONCLUSION AND DISCUSSIONS: THE WAY FORWARD

LIST OF FIGURES

LIST OF TABLES

CHAPTER 1. Introduction

1.1. Introduction

The de-industrialisation era started by the late 20th century has meant for most Western cities to improve, support or develop their service industries to survive in the fierce competition environment induced by the globalised economic systems. For those cities, which have chosen tourism to replace the decaying manufacturing industries in their urban cores, the sector is expected to play a *'catalyst'* role in order to give an impetus to interrupted economic growth. In fact, tourism has been proved to be a sector, which can enhance the viability and the living quality of urban areas, if managed and developed effectively. In addition, the economic, social and cultural benefits of the sector cannot be disproved providing that a positive image for a given city is established and sustainable tourism development plans and policies are practised accordingly. In other words, tourism can help to: boost civic-pride; provide new employment opportunities; attract new investments; enhance the overall image of cities; conserve urban environment and protect historical buildings and heritage sites; improve infrastructure facilities and; most importantly encourage the collaboration between all sorts of organisations and communities within an urban system.

It is such appreciation of tourism, albeit a belated one, which has led to more systematic development and marketing plans to be implemented by the concerned authorities in co-operation with sector stakeholders than ever before. In fact, cities have always been important tourism destinations mainly due to their importance as trade, culture, education and communications centres. In addition to their high population density, urban areas have a geographical concentration of heritage sites and various other tourist attractions providing cultural and recreational opportunities for diverse tourist market segments, ranging from residents to day-trippers, and from short-break holidaymakers to business travellers. Therefore, the main focus of this investigation is *'urban tourism'* and *'marketing city destinations'*. The following sections provide insight into the purpose of the research, its objectives and the overall structure of the thesis.

1.2. Background to the Research

As it is further investigated in Chapter 2, urban tourism, in comparison with the studies on other types of tourist destinations, is a relatively new phenomenon in the field of tourism and travel management studies. The interest of academics and the number of studies in urban tourism only accelerated following initial research into the subject in the 1980s (Ashworth, 1985; Jansen-Verbeke, 1985). While these first studies mainly investigated the reasons for the neglect by both tourism and geography researchers of this particular field, they tried to raise awareness of the subject by approaching it from a general perspective. As descriptive studies, these initial efforts mainly concentrated on:

- *urban tourism as an emerging tourism form* (Ashworth, 1989; Jansen-Verbeke, 1986; Vandermey, 1984; Woodside et. al. 1989);
- *tourism as a catalyst in urban areas* (Beioley, 1981; Law, 1990; Vukonic and Tkalac, 1984; Millspaugh, 1990; Williams and Shaw, 1990) and;
- *the package of tourism and leisure facilities, activities and services of city destinations* (Ashworth, 1985; Blank and Petkovich, 1980; Gudelis, 1986; Jansen, 1989; Jansen-Verbeke, 1985; Spink, 1989; Wall and Sinnott, 1980).

More recent research into urban tourism, however, is more diverse with the approaches adopted to shed light onto both supply and demand sides of the tourism sector. In the literature, there are now many case studies investigating various aspects of urban tourism ranging from visitor mixes of city destinations to particular tourism types such as sports tourism, heritage tourism and culture tourism in major cities (Law, 1996b; Murphy, 1997a; Mazanec, 1997a; Acioly, 2001; Ashworth and Tunbridge, 2000; Fainstein and Gladstone, 1999; Pearce, 2001; Barker and Page, 2002; Page and Hall, 2003). With an increasing interest of the urban decision-makers in the Western world to enhance the competitiveness of their city destinations in an international tourism market, many studies have also investigated the concept of competitiveness, destination images of urban areas and their tourism marketing plans and activities (Sadler, 1993; Ward, 1998; Bramwell and Rawding, 1996; Gold and Ward, 1994; Hopper, 2002; Bradley et al., 2002; Richards and Wilson, 2004).

While there is still a need for further research on urban tourism and marketing city destinations, what seems to be lacking in the existing literature is a desirable number of studies on the city destinations of developing countries and their comparison with so-called *'well-established'* city destinations of the developed world. Indeed, the dominance of the American and European cities in the field of urban tourism research is evident. Besides, apart from the conceptual descriptions and the case studies examining individual cities as tourist destinations, a general approach to analyse, investigate and compare the development, management and marketing of city destinations has not been carried out with real-life examples in the existing literature. In short, the complex nature of urban destinations, which combine diverse tourist products in their tourist package and numerous visitor types, is considered to restrain the development of general models for destination assessment.

1.3. Purpose of the Research and Topic Selection

This study attempts to explore new methods of improving marketing communications, co-ordinating marketing activities and implementing marketing decisions in city destinations. All these marketing concepts are to be harmonised with other destination-based marketing notions such as image marketing, competitiveness, city marketing, marketing partnerships and strategic marketing planning..

By concentrating on such marketing aspects within the framework of urban tourism, this study aims to develop a marketing model for city destinations. To do that, three case study cities have been chosen from three different countries: London, Amsterdam and Istanbul. While there are quite few studies on the tourism industry of Amsterdam and London in the literature (Dahles, 1998; Fainstein, 1996; Jansen-Verbeke and Van De Wiel, 1995; Van Limburg, 1997; Barke, and Harrop, 1994; Brownill, 1994; Bull, 1997; Bull and Church, 1996; Tyler, 1998; Hopper, 2002), there is a considerable gap in urban tourism studies in the Turkish academia in general and in the studies investigating the tourism industry of Istanbul in particular. Hence, the research is built on an assumption that the efforts of the tourism authorities and tourism organisations of Istanbul are finite in comparison with the marketing activities pursued in London and Amsterdam. By taking lessons from the experiences of these two European destinations and, by investigating the strengths and weaknesses of all three destinations, it is thought that a general marketing model can be developed which could be applied to the tourism sector of Istanbul, with suggestions for marketing strategies for the city. The selection of these particular destinations is discussed in Chapter 5.

In this research, before the marketing of city destinations is fully explored, tourist product packages and the tourism management of city destinations are investigated, to base the proposed marketing theories on solid, systematic and logical grounds. To do that, the supply side of the case study cities was put at the centre of the investigation in order to assess the tourism sector as a part of the functional and formal structure of an urban network. In fact, if the time and funding limitations of the present research are considered, it can be said that a detailed demand analysis of three different cities cannot be completed. However, existing research and statistical data were sought to analyse the demand-side of the urban tourism offers in as much detail as possible. The supply side analysis of the case study cities, meantime, was carried out with the purpose of identifying the core and supplementary elements of urban tourist product packages, examining the strong and weak aspects of the tourism sector in the cities concerned and assessing the current function and possible development opportunities of tourism there.

1.4. Research Aims and Objectives

Following the selection of the research topic and the case study cities, the research objectives were identified prior to conducting the literature review on urban tourism and the marketing of city destinations. The initial objectives which, were presented in the proposal of the investigation, have been refined throughout the literature review process, as new research projects, articles and books on the research topics, have provided new insights on destination marketing in general and on the tourism sector of the case study cities in particular. Nevertheless, the objectives were fully structured before the primary data collection was started in the selected cities.

From the very start of the research, it was clear that the research should somehow focus on the marketing activities of city destinations and the marketing process followed by city destination marketers. The secondary data gathered on the research topic provided some guidelines on the importance of the public and private sector organisations in marketing destinations, the marketing product clusters of city destinations, partnerships, marketing tools, strategic marketing, image marketing and, the competitiveness of city destinations. Nevertheless, the secondary data also showed that there is a gap in the existing literature with regard to a universal marketing process to be followed when marketing urban areas as tourist destinations.

The main reason for such a gap was mainly because of the common idea that each city is unique as a tourist product package, hence each requires a strategic marketing plan prepared according to its unique characteristics. In fact, the majority of the case studies in the existing literature examine urban areas as tourist destinations individually, but not in groups for comparison. Such case studies tend to investigate either the strong and weak aspects of the tourist offer of a given city, or the planning and development of tourism in the city from a marketing perspective. Although there are very few comparative studies of more than one city destination (Mazanec, 1995; Van Der Borg et al., 1996; Stead and Hoppenbrouwer, 2004), even these do not provide insight into the development of a general marketing model for urban destinations.

One objective of this research, therefore, is based on an idea that urban areas include unique and various tourist products and services in their product package, but the marketing mechanism of each city can be assessed according to a marketing model which can be developed according to the common steps followed by city destinations. Surely, to be clear, such a model should also embrace the unique characteristics of individual cities. Therefore, during the initial secondary data collection, the objectives of the research have been constantly revised in line with the findings suggesting various key issues including the following:

- Strategic marketing planning, which consists of short, medium and long term plans, is essential to enhance the competitiveness of city destinations;
- A strategic marketing model can be developed by investigating the common characteristics and marketing activities of various city destinations;

- Such a universal marketing model puts the unique characteristics of a given city at the centre of a destination marketing process, but follows some general steps that can be applied to various urban destinations, and;
- While a marketing plan for a given city destination can be developed by adapting such a model according to the characteristics of the tourism sector, an already developed marketing plan by any city destination can be analysed according to the logical and sequential phases of this model.

In the light of such information, the research aims can be split into two groups:

❶ The first group relates to urban environment and destination marketing in general and consists of the following aims:

- to define the concept and development process of city tourist destinations as marketable product packages, with a thorough analysis of both the supply and demand sides of the tourism sector in urban areas;
- to identify the factors, which influence the competitiveness of urban areas;
- to stress the importance of various marketing tools used by city destinations;
- to ascertain the marketing activities of public and private tourism organisations, and their combined efforts to strengthen the market position of the tourist product packages of city destinations and;
- to develop criteria to identify the general steps of a strategic marketing model for city destinations.

❷ The second group relates the tourism sector of the case study cities and includes the following aims;

- to distinguish the differences in the tourist product packages offered by each city;
- to clarify the visitor mix of each city;
- to examine the marketing activities of the key stakeholders of the sector in each city;
- to investigate the tourism management systems of the case study cities;
- to identify differences between developing and developed countries when marketing city destinations;
- to take lessons from the previous experiences of Amsterdam and London for Istanbul;
- to identify the reasons for the lack of a strategic marketing plan for Istanbul;
- to apply the developed marketing model to Istanbul and to suggest optimal strategies for the marketing of its tourist offer.

The research objectives, meantime, are a bundle of questions raised by the above listed aims and the analysis of the existing literature on the research topics. The questions, which the researcher has striven to answer throughout the study, can be listed as follows:

1) How diverse can a tourist product package of a city destination and its market segments be?
2) Why is there a need to market urban areas as tourist destinations?
3) Who are the key decision-makers when marketing city destinations?
4) What is the importance of partnerships in city destination marketing?
5) What are the major factors, which influence the competitiveness of city destinations?
6) What are the success criteria in city destination marketing?
7) What are the strengths and weaknesses of the case study cities as tourist destinations?
8) How differently structured is the tourism organisational network in each city?
9) What are the marketing activities pursued by the tourism organisations in the case study cities?
10) How can Istanbul be better marketed as a tourist destination?
11) What sort of success and failure stories of Amsterdam and London can be taken as lessons in developing marketing strategies for Istanbul?

1.5. The Structure of the Thesis

The thesis consists of eight chapters. This first chapter introduces: the core concept of urban tourism with its evolution as a research phenomenon; the purpose of the study; the research aims and objectives, and; the outline of the thesis structure. The introduction is followed by two chapters based on the findings from desk research and providing the background to the research topic through the analysis of previous research in the fields related to urban planning and destination marketing.

The first of these chapters, Chapter 2, can be split into three main sections: definition of cities and their dynamic system; urban planning and management, and; tourism in urban areas. As the research aims to explore city destinations as marketable commodities, the definition of urban areas and the prerequisites for human settlements to be considered as cities are investigated in the chapter. Due to the fact that tourism has only recently been paid attention as an income generator sector by urban development authorities and marketers, the factors forcing such key organisations to put greater emphasis on service-based economic development in the era of post-industrialisation and within the concept of city dynamics, are studied. The emerging issues in the literature, such as urban revitalisation schemes; cities in globalised economic environment, and; the need for collaborative approach in urban planning are all discussed, albeit with more emphasis on the topics contributing to the identification of the research objectives. The chapter concludes with detailed evaluation of tourism in cities. The sections on: the characteristics of city tourism; its development process; tourism management networks in urban areas; supply and demand sides of city tourism, and; the benefits and drawbacks of tourism-based urban growth, are aimed to familiarise readers with the research subject and to serve as a guide to the later chapters, where the primary data collected on the related topics are presented.

The second part covering the findings from the extensive desk research conducted throughout the research process, Chapter 3, provides further insight into tourism in cities, but from the perspective of destination marketing. The increasing competition among city destinations to gain a desirable position in the international tourism map and their efforts to attract residents and businesses as well as visitors are discussed in the first sections. The interdependence of tourism and other urban functions and the need for co-operation among sector stakeholders to create a one-voice approach in marketing are assessed along with the examination of the tourism management network in cities consisting of various public and private organisations as destination marketers. The chapter also aims to shed light onto the manifestation of four 4Ps of marketing when selling urban areas for tourism, namely place/product, promotion and price. While it analyses the concept of '*a product cluster*' as the marketable package representing the overall sector in urban areas, the price component of marketing is covered under two headings: price formulations for city destinations, and; the costs of city destinations. A set of marketing tools used by city marketers and their comparative importance are also discussed. The chapter concludes with the sections on strategic marketing and planning and pinpoints at the emerging phenomena both as research topics in the academia and as marketing strategies used in real-life applications, which include: image marketing; product differentiation and; market segmentation for cities.

An introduction to Istanbul, the main case study of this research, is provided in Chapter 4 with the aim to clarify some urban characteristics of the city, before its tourism sector is further analysed in the later chapters. Given the importance of analysing tourism in cities as a component of the overall urban mechanism, the chapter outlines some general urban characteristics and the evolution of Istanbul as an urban area with special interest in linking these urban features with the tourism sector and its functioning in the city. The chapter first looks at the geography of Istanbul, which is considered to have determined its history strongly. The section, which provides background to the history of the city, is divided into three sections: the Roman and Byzantine Era, the Ottoman Era and the Republican era, which are argued to have inherited several historic sites and buildings composing the heritage tourist offer of the city today. Following the history of the city, the socio-economic and demographic characteristics of Istanbul are summarised, followed by matters concerning the urbanisation of the city. The evolution of Istanbul as an urban area and its urban dilemmas and challenges are dealt with in later sections of the chapter, which concludes with some thoughts on the future of the city.

The methodology of the research is explained in Chapter 5, which begins with the outline of the research process and the research duration split into specific time periods for the conduction of the selected research methods and writing up the thesis. This study has been developed as a qualitative research using a grounded theory approach, which places desk research at the centre of the project. That is why the sections on methodology first investigate the collection of secondary data and its influence on shaping the research objectives. Other research methods *–i.e. in-depth interviews and multi-site case studies-*, are also discussed as well as the reasons for the selection of these particular techniques for primary data collection. The process of grounded theory; the benefits and drawbacks of qualitative studies; the validity of the research; triangulation of the research methods to strengthen the credibility of the research findings, and; the use of a scientific software programme for the analysis of the primary data are other topics covered by the chapter. Following the analysis of such methodology-related issues, the chapter concludes with some remarks on model development, as the main aim of the study is to develop a marketing model for city destinations and to apply the proposed model to Istanbul in order to suggest marketing strategies for the development and marketing of tourism in the city with lessons learnt from Amsterdam and London.

Chapter 6 is first of the two-part presentation of the primary data collected for this research. The chapter aims to assess Amsterdam, London and Istanbul as tourist destinations and focuses on their tourist offers as product packages. To this end, the life cycle, SWOT and carrying capacity analyses are applied to the cities for detailed evaluation of their tourism sector. The aim of carrying out life cycle analyses in this research is not to support the existing life cycle models in the literature or to provide similar life cycle patterns to prove the qualification of the case study cities' status as destination products. Instead, the analysis is applied to understand the evolution of the tourism sector in each city through specific time periods. Therefore, the analysis is considered as a *'diagnostic tool'* (Hart et al., 1984), and its utilisation is limited by the employment of some general visitor statistics, which are compiled mainly from the annual visitor surveys. The statistical analyses of the tourism sector in each city are, then, compared with the interview findings in order to draw explicable conclusions on the evolution of the sector through time and its current place.

The SWOT analysis, meantime, is carried out for close evaluation of the cities' strengths and weaknesses as tourist product packages. After all, strategic marketing and planning put the emphasis on the assets of a destination product, which should ideally meet the expectations of consumers, while weaknesses should be eliminated or improved. There is no doubt that major city destinations such as London, Amsterdam and Istanbul, have established their positions in international markets owing to their unique strengths. However, one should not forget that ignored weaknesses and threats may undermine the future of a destination, while missed opportunities would expose tourism to fierce competition. Undoubtedly, it is difficult to assess every single aspect of an urban tourist destination, as they consist of many sub-products including not only varied types of attractions, but also, what may be called *'substitute services and facilities'* ranging from transportation to security. That is why, in this research, the SWOT analysis refers only to the overall product offer the cities rather than manifold individual tourist attractions and other tourism organisations.

Finally, the carrying capacity analysis is applied to the case study cities in order to identify the merits of potential tourism growth in line with the manageable capacity limits of each city. It can be argued that the analysis plays an important role in planning and managing the tourism sector, especially if a destination suffers from an unplanned growth of visitor flows causing damage to the local environment along with resentment among residents toward tourism. The application of the analysis is considered especially imperative for those destinations, which experience impaired visitor satisfaction and a deteriorated quality of tourist products mainly caused by increasing condensation of visitors flows at certain tourist zones and during peak seasons. The analysis can offer a useful guideline to tourism developers and urban planners who aim to provide growth initiatives in order to help a destination to recover from its saturation or declining position in the tourism life cycle by concentrating on its strengths and opportunities. In other words, a sensible and meaningful analysis of a destination product and its growth process can be best achieved by interrelating the results of the three analyses accordingly.

Given this intricate concept of carrying capacity, an ideal analysis would put the tourism sector under a microscope with the aim of conducting a detailed investigation of its product, policy and market aspects together with other urban functions and communities, which have direct or indirect effects on the sector. While such an application is difficult to conduct, if not impossible, financial and time limitations has restricted this research to concentrate on all urban-related issues and problems of the case study destinations. Instead, an assessment of the cities' tourism offer is provided in the last sections of Chapter 6, with emphasis on the tourism-related components of the destinations. The available quantitative and qualitative data on tourist accommodation, seasonality, tourist zones, crowding and, the quality of life are presented with further information obtained from the interview findings.

Having investigated the characteristics of the case study cities as tourist product packages in Chapter 6, the second part of the primary data findings is presented in Chapter 7, which approaches the case study cities from the perspectives of: tourism management in urban areas; major decision-makers and city marketers; strategic marketing planning and; the efforts of key sector players to promote the cities concerned. As in the previous chapter, the information presented under the headings compares the primary data with secondary information sources in the hope that the actual practices can be compared with the opinions and beliefs of the interviewed personnel representing various stakeholder organisations. Following the investigation of tourism network in each city, the chapter concludes with several sections on marketing-related concepts, such as competitiveness, market segmentation and marketing tools.

The aim of the first section on tourism management networks is to assess whether tourism organisations in Amsterdam, London and Istanbul work in harmony in order to activate tourism's role as a catalyst in urban economies, as often stated in the tourism development and marketing plans of the leading tourism authorities. The existing literature on the subject suggests that consistency and creating a one-voice approach are crucial in destination marketing. Interdependence of tourism organisations operating in city destinations does not only make urban environments complex tourist product packages, but also requires destination-wide tourism development and marketing plans to be supported and practised accordingly by a variety of organisations including public authorities, attractions, hotel establishments, restaurants, intermediaries, trade associations and unions, residents and international organisations. In addition to such plurality of sector operators and destination marketers in cities, the need to consider the sector as a component of the overall urban economic and social systems means that various other organisations, such as security forces, municipalities, and local authorities responsible for education, housing, trade, environment, culture and infrastructure maintenance play important roles in either product improvement and development or information dissemination within the destination network.

Clearly it would be impossible to examine the efforts of all concerned organisations to market the case study cities in detail owing to the limitations of this research. Therefore, attention in Chapter 7 is especially given to those leading tourist authorities responsible for the city-wide planning and marketing with some examples demonstrating the differences between the cities in their approach to destination marketing. Different hierarchical levels of tourism organisation networks extending from national to regional tourism authorities, and from local tourism organisations to partnerships are also investigated where applicable, in order to understand the importance given to each city as a tourist destination and their tourism sector by the governments and the stakeholders.

The sections of the chapter on strategic marketing focus on the marketing tools and techniques exercised by the leading tourism authorities in order to accomplish the targets and goals set in their tourism development and marketing plans. To this end, the current marketing activities of the concerned authorities are evaluated along with the interpretation of the interview findings to understand how each city strives to succeed in the international arena and how successful their efforts are found by the key stakeholders. There is no doubt that the international tourism sector is a competitive marketplace with the number of city destinations, which approach tourism development and marketing more systematically than ever before, increasing steadily. While those cities managed and marketed effectively are considered to become *'winners'*, others that suffer from shortcomings in both demand and supply aspects, fail to place their city on the international tourism map, and become *'losers'*. Although every city destination combines a unique set of tourist services and products in its product package and ideally aims to strengthen its offer with tailor-made policies, one way of measuring their success is to compare their efforts with those of competitors. This is why, the competitiveness of the case study cities and their international and national competitors in the tourism market are examined in the chapter. The comparison with competitors, albeit without the support of detailed and specific research on the subject, is considered to further strengthen the understanding of the cities' offer as marketable products.

Since effective destination marketing should search for optimisation in meeting the needs and wants of potential and existing visitors with the business expectations of sector stakeholders, the marketing segments targeted by each city are also covered in Chapter 7. Segmenting the market is carried out under three sections, namely international and domestic tourism marketing; geographical distribution and major visitor generator countries and; segments identified according to the purpose of travel. Once again, the emphasis put on specific market segments in the actual tourism plans are compared with the results of the interview analyses. The evaluation of market segments contributes to the analysis of the promotional input selected by Amsterdam, London and Istanbul for particular segments and serves to confirm whether segment-specific marketing activities are supported by the feedback from sector stakeholders or not. The chapter concludes with the exercises and prospects of image marketing and marketing research, which are considered to be crucial for successful strategic marketing.

Finally, in the concluding chapter, Chapter 8, the aim is to propose a developing model for city destinations and to suggest marketing strategies for Istanbul with lessons from Amsterdam and London. This research is build upon the fundamental criterion for successful destination marketing, which is that city destinations require consistent, corporate, and coherent strategic marketing plans to succeed in the fiercely competitive international tourism market. So called *'strategic marketing'* puts the emphasis on short-term tactics and action plans implemented within the framework of broader long-term goals and objectives. The interview findings and secondary data on marketing urban areas for tourism indicate that there are several key terms related to the product, management and marketing aspects of the tourism sector, which should be the indispensable ingredients of strategic plans and projects when selling city destinations.

These key terms are formulated in a three-step model in the chapter, which, then, applies the model to Istanbul for the proposal of marketing strategies.

1.6. Conclusion

Although cities have been centres of trade, education, culture and government and, have been visited by travellers throughout their history, it is only since the early 1980s, when the cities in the developed world have been taking tourism development more seriously and trying to strengthen the sector with strategic plans and tactics hinged upon the existence of quintessential factors for tourism development (Judd, 1999; Page and Hall, 2003). While such quintessential factors include social, cultural, economic and environmental endowments of urban areas, real life experiences have proved the need for an integrated approach to deal with city destinations, and the consensus has been long reached that an urban environment is a complex one requiring long-term plans collaboratively established by the concerned public and private organisations and also inhabitants.

The intriguing structure of urban systems is further complicated when multi-sided supply and demand characteristics of tourism are taken into account. Therefore, investigating how tourism can accelerate economic growth through attracting new investments, creating new income sources, providing employment opportunities and enhancing the image of a city is a complex task. This two-folded complexity of city destinations requires special attention and systematic evaluation of the sector and its sub-industries. In the light of this information, this research aims: to define the concept and development process of city destinations as marketable product packages; to examine differences between developing and developed countries when marketing city destinations; to identify factors, which influence the competitiveness of urban areas; to ascertain the marketing activities of public and private tourism organisations, and their combined efforts to strengthen the market position of their destinations; to take lessons from the previous experience of Amsterdam and London for Istanbul, and; to develop a number of key criteria to identify the general steps of a strategic marketing model for city destinations.

CHAPTER 2. CITY AND TOURISM

2.1. Introduction: City As a Concept

Cities are, arguably, the most developed human settlements, which are made of amalgamations of multiple activities and facilities. Although they may vary across the world, they are the places of power, trade, social interaction and education. In many cases, they owe their importance as human settlements to their strategic geographical locations. The main offices and departments of governmental authorities and the headquarters of international companies tend to be in the major cities, some of which are also the only privileged places to be the capital of the nation. They are the gateways of countries, located at the points of commodity and people transaction and are surrounded by termini, motorways and ports. Good transportation links attach them to the outside world. Cities are all equipped with hospitals, education outlets at all levels, justice systems, cultural organisations, housing opportunities for different social groups, communication networks and recreational activities.

However, they are also the places at danger. Condensed population and trade activities create a great potential for the deterioration of urban areas. Hence, if not managed adequately, cities become the potential ingredient of their own decay. Their complex structure emanates from segregated social communities, numerous economic activities and various political decision-making mechanisms and, becomes further complicated with the involvement of the coexisting and, to a certain extent, incomparable zones such as inner city cores, and residential and industrial districts. This characteristic manifests itself in spatially segregated societies, businesses and economic activities scattered across urban regions alongside the city's own history and culture. Therefore, this chapter investigates the role of tourism in urban areas following the definition of cities and the identification of city dynamics. The tourism organisation network, the characteristics of tourism and the benefits and drawbacks of tourism development in urban areas are also evaluated in order to provide the literature background to the research topic.

2.2. Defining Cities

In the literature, *'city'* definitions indicated by social geographers, have followed an evolutionary process. At the initial stages, in the 19th and early 20th century, the ecology of urban settlements was used as a main criterion for clarifying the characteristics of cities. Earlier definitions focused on the geographical scale of urban settlements. This was followed by the neo-classical and structuralist approaches, which defined cities as economic and social agglomerations (Short, 1984), and also as social complexes where production and consumption characteristics determined the economic structure. Although the production characteristics of cities may have changed throughout the evolution process of cities especially after the de-industrialisation era started in the late 19th century, consumption in cities has continued to increase in line with their increased population.

Today, however, *'the city'* is considered as a spatial complex where interdependent elements like ecology, economy and society are investigated as a whole. Cities are seen as complex, dynamic and social organisms, in which people work, live and visit. The manmade and natural elements, which form cities, are considered as interconnected components, whereby the concentrations of money, power and labour and, the activities and behaviour of residents differ from other types of human settlements. Therefore, any research on urban geography needs to look into the effects of the interdependent components of city complexes in order to provide an accurate and coherent contribution to the field, even when investigating only a single aspect of urban agglomerations.

Some examples of *'city definitions'* from the literature are as follows:

> "*Cities are agglomerations where people and activities are concentrated in space*" (Short, 1984, p.20).

> "*Cities possess to a greater or lesser degree four main qualities that define them as cities. These are high physical densities of structures, people and functions; a social and cultural heterogeneity; an economic multi-functionalism; and a physical centrality within regional and inter-urban networks*" (Ashworth, 1992, p.5).

> "*Cities are organisms, with an evolutionary history, a life of their own, and clearly identifiable consumption patterns. The citizens who create them need to recognise and take responsibility for these patterns. Unlike countries, cities are definable structures, whose inputs and outputs can be precisely measured. They are units more easily tackled when it comes to reorganising their consumption and discharge*" (Girardet, 1992, p.16).

> "*Cities are engines of economic growth and social development and;...are the key nodes of capital accumulation, reinvestment in new sectors and focal points of the development of specialised services*" (Daniels, 2004, p.501).

As these definitions illustrate, one of the major determinants of urban settlements is their geographical boundary. In comparison to international regions or countries, cities are bound on a relatively small geographical scale, which makes them easier to assess. However, it is their relatively large territorial boundaries as compared to rural settlements, which makes it difficult to classify cities into groups.

In fact, the area they are located in can be so large that even urban settlements need to be subdivided into specific functional areas. Jansen-Verbeke (1992) splits these subdivisions into three groups:

- The Inner City: Also called *'the core'*, the inner city is characterised by its multifunctional character. In inner cities, high-valued land is used diversely. Social, economic and cultural processes are reflected in the dynamism of this urban environment that is commonly the hub of commercial and retail activity in the city. While the inner city has the greatest potential for access by the largest number of people, the image of the city as a whole tends to be strongly associated with the views and experiences of the inner city area. This functional environment of an urban area also tends to have the highest concentration of pedestrian flows and an absence of a permanent residential population.
- Urban Residential Area: Although the usage of city fringes for different purposes depends heavily on the social, environmental and economic characteristic of each city, recent trends among city inhabitants to choose hinterlands as places for residence is widespread. However, the area fringing the core of a city can also be a display of diverse functions of urban agglomerations including: industrial estates; huge shopping centres and warehouses; transport terminals; and residential and recreational areas.
- The Urban Region: The urban region embodies the inner city and urban residential area together with farther hinterlands of a city. This urban environment shows polarities in different city establishments according to their importance as trade, culture, communication, education and government centres. A city with good transportation links and trade opportunities ensuring economic growth, tends to spread across a region so that the gaps between nearby towns and cities are bridged and have even disappeared. As a result, the boundary of the city enlarges in conjunction with the evolution of new outer city districts. Production outlets of manufacturing companies, universities and research centres have a tendency to be located on the outer fringes of the city where accessibility is still good, land is cheaper, and the stress of a congested area is absent.

In this research, cities will be considered in a social context. As tourism activities and attractions tend to concentrate in the core of city destinations, the emphasis will be on the inner city environment of urban areas. Nevertheless, the outskirts of city destinations will also be evaluated with regard to their role and importance in tourism.

2.3. City Dynamics

Cities have been the scene and setting throughout human history of major social, economic and political change. Some cities grow because of their logistic locations and the overall economic prosperity of the region, while some may decline owing to the shifts of businesses to new and more advantageous locations. Thus, life cycle models can be applied to the process of urban development process, which follows a cyclical pattern. Furthermore, although there are some general approaches to the development process of industrialised cities in developed countries and their revival in the post-industrial era, different cities have different evolution models, which would mainly be shaped according to the success of their economic sectors and managing authorities.

In industrialised cities of developed countries in the late 19^{th} century, accelerated growth was followed by: the decline of major industries mainly because of the introduction of alternative technology; fierce competition with developing countries where labour is cheap and; mismanagement and government restrictions' on taxes which interfered with the effective operation of the manufacturing industries (Daniels, 2004). In the initial periods, these cities grew with attractive job opportunities and an appealing quality of life. However, as Kotler et al. (1993) mentions, inward migration raised major problems such as lack of infrastructure, unemployment, inefficient social services and increases in local taxes. Following the decline of major industries, residents and businesses started to move out of the city boundaries to find cheaper and safer places. Migration from/to rural and urban areas showed some remarkable differences with regard to the characteristics of the residents and businesses moving outside cities and the ones moving in. While high-income professionals and larger industrial organisations were more eager to leave city centres, unskilled, uneducated and ethnic minority groups were settling in urban establishments (Van der Borg, 1991). Van den Berg et al. (1992) argue that such problems resulted in better understanding and use of public and city management and marketing systems to recover from the *'urban crisis'* by applications of strategic management and marketing approaches. There is no doubt that the changes in the field of city management and marketing will continue in the future as well.

2.3.1. Transformation of Cities: From Urbanisation To Re-urbanisation

Today, the transformation of cities continues variably. However, a general model, which explains how industrialised cities grow, decline and take action to revive, is used to understand three key words in the city terminology: urbanisation, suburbanisation and re-urbanisation. Figure 2.1 shows these three different phases of cities' evolution, which are mainly determined by the flow of jobs and populations. Each phase provides insights into the social and economic structures of urban cores.

Figure 2.1. A General Model of Urban System's Change

Phase 1

Jobs located in big cities. Growth of city cores.

Phase 2

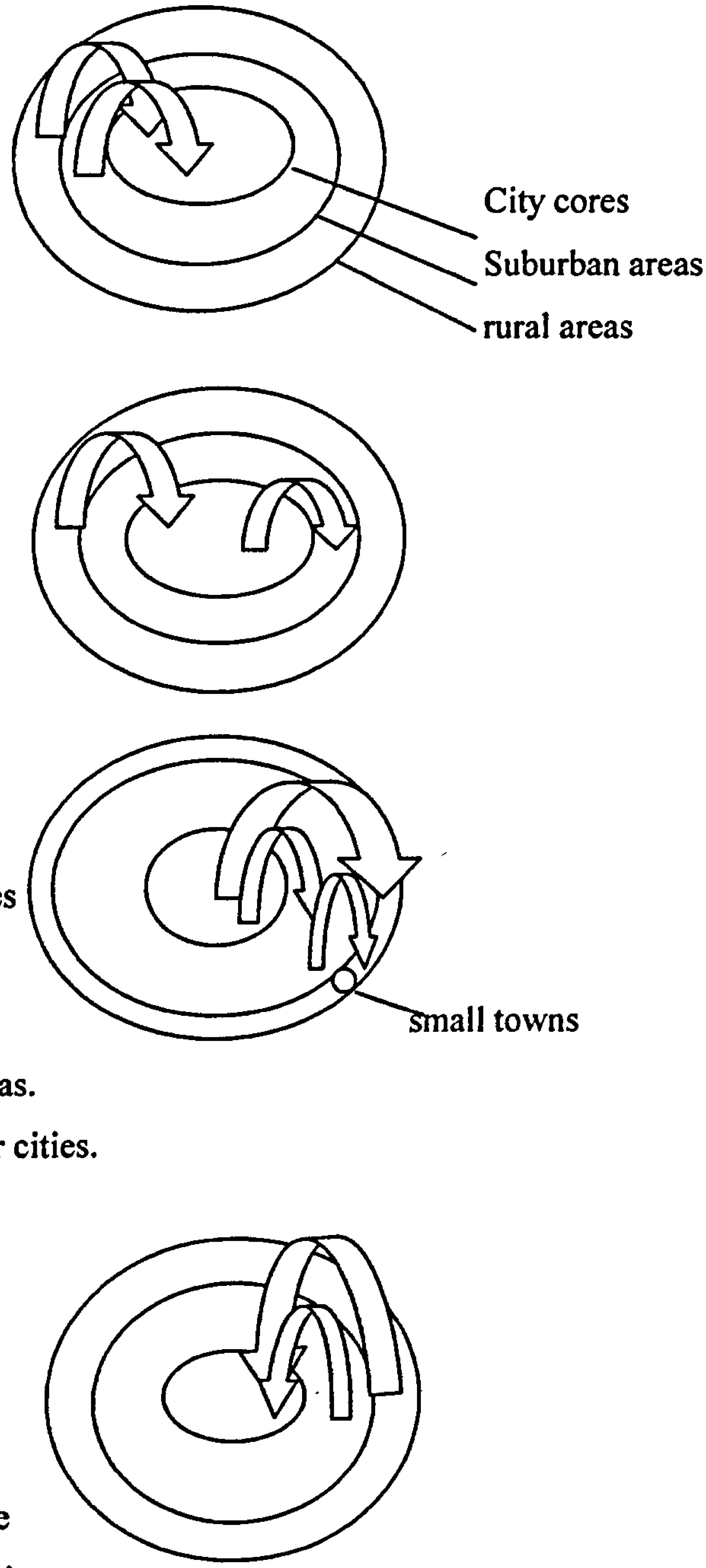
Suburbanisation of population.
Continuing rural-urban migration.

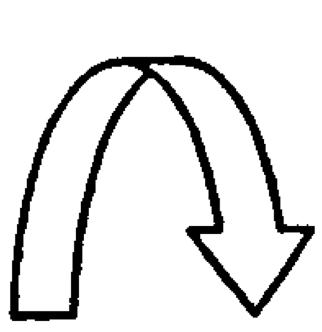
Phase 3

Suburbanisation of jobs and people. The city is more important for services than as a manufacturing centre. Non-metropolitan growth in amenity rich areas. Growth of selected smaller cities.

Phase 4

Contemporary approaches to city management and marketing. Encouraged revitalisation of cities by governments and private organisations. Re-urbanisation occurs as the image improves.





: Population and job movements.

Source: Short (1984), p.63.

Phase 1 is the period of initial industrialisation with the establishment of factories in cities. At this stage, cities grow fast in terms of both population and industrial employment, especially where natural resources are easily accessible (Van Den Berg et al., 1992). Consequently, urbanisation is triggered by large-scale rural-to-urban migration and the concentration of economic growth in cities. The majority of cities in the Western developed countries passed this stage long before those in developing countries, which, to a certain extent, still continue to grow in population. In Europe, for instance, urbanisation showed progressive growth after the second half of the 18th century. The growth of industrialisation in the 19th century gave further impulse to urban growth, drawing masses of migrants to cities in search of jobs in countries like Britain, Germany, Italy and France. Schuurmans, (1986) cites that developing countries, on the other hand, have recently developed their manufacturing industries, hence Mexico, Cairo, Beijing and Istanbul have witnessed urbanisation much later than the Western cities.

Phase 2 is associated with suburbanisation, which is the rapid growth of tertiary activities (Van Den Berg et al., 1992). At this stage, manufacturing industries develop further and better transport facilities allow sector to be more footloose and enable people to live further from their place of work. The central city population begins to decrease while the suburban population increases. There is a continuing decline in the rural population. The rise of prosperity, increased car-ownership and the emergence of new values and life-style increase the outward migration of people and economic activities to suburban areas (Van der Borg, 1991 and Loibl and Toetzer, 2003).

Phase 3 is associated with the suburbanisation of economic activities. Businesses and residents move out of cities, as the disadvantages of cities lead to a movement down the hierarchy of population and economic growth. De-industrialisation creates problems like unemployment and segregated social classes. As the businesses of cities collapse in permanent decline, skilled and higher-paid workers, new investment and jobs move beyond the core. The negative factors of inner city areas like: crime; high energy costs and tax regulations; diminished quality of life and; government policies in favour of suburbs on housing, investment and economic activities, force both businesses and people to move to suburban districts (Hannigan, 1998).

This leaves inner cities with a surplus of population who are disproportionately elderly, have either traditional skills or none at all and, are mainly drawn from ethnic minorities. Meantime, an uneducated population in inner cities creates problems such as poverty, increased death, disease, and crime rates (Law, 2002 and Stead and Hoppenbrouwer, 2004). Cities, which rely heavily on a single manufacturing industry, suffer severely in this phase. However even large cities, which have a broader economic base, may need to pursue long-time strategic management to overcome the troubles caused by the loss of manufacturing employment (Short, 1984).

At the final stage, phase 4, cities search for new industries to boost the urban economy, which is hampered by the decline of manufacturing industries. New uses are found for redundant buildings, which are the main outcome of the decrease in population and businesses in inner cities. Tourism and recreation become part of an urbanised life-style and are used as *'catalysts'* in urban regeneration (Law, 2002). The historic quarters and old parts of cities turn into open-air museums with no residential population and with a few commercial activities mainly in the service sector. Although it is an established fact that the greater part of the demand for tourist and recreational goods and services originates in urbanised areas, not all cities manage to transform their cores into tourist destinations. In fact, most of the major cities of the developed countries are now stuck between the phases of suburbanisation and re-urbanisation. Only a few of them have managed to complete the transition process and have recovered from the negative images implied by urban decline (Van Den Berg et al., 1992). These cities which have been trying to revitalise their economies since the decline of traditional industries, have proved that success relies on strategic management and marketing, unique attractions and efficient infra- and supra-structure facilities (Stead and Hoppenbrouwer, 2004).

But not all cities follow these phases in their evolution process. Some cities, for example, which are situated on important transportation networks or, are close to natural resources or, play an important role in international politics by hosting worldwide organisations, may go through an evolution process with continuous expansion. Distinctive internal and external factors may become powerful determinants in the city evolution process. In many cases, it is the overall evolution of countries' well-being and importance in the international arena that shape major cities, with corresponding changes emerging in the functions of their urban systems (Burtenshaw et al., 1981 and Daniels, 2004).

2.3.2. Revitalisation in Post-industrial Cities

The decline of manufacturing industries started in the late 19th century in developed Western countries and caused by the closure of traditional businesses, was particularly severe for urban populations where job losses and the lack of entrepreneurial investments had impacts on many European cities (Spink, 1989). The shift of businesses left derelict factories, warehouses and office buildings, while high levels of unemployment forced inhabitants to search for new jobs outside city centres, resulting in moves to new residential areas. Changes occurring in transportation, which diverted the attention of commuters to alternative modes, also resulted in abandoned port and railway facilities and termini (Broadway, 1997).

The problems caused by the move of manufacturing industries from urban areas to cheaper locations reversed the positive image of industrialised cities, which were already suffering from the common problems like congestion, pollution and lack of infrastructure facilities, which forced local authorities, policy makers and business groups to revive their cities by attracting new industries, residents and visitors through the applications of modern city management and marketing systems reflected in long-term plans. North American cities, where the revitalisation trend was referred to as *'city boosterism'*, were the first to practice city-marketing strategies with the support of both public and private organisations *-i.e. Toronto, Baltimore and Boston-* (Van Engelsdorp, 1988).

Today, revitalisation programmes are carried out by urban authorities worldwide. Although each city has different strengths and weaknesses, the following four key aspects of city life need to be emphasised in the revitalisation schemes of almost all major cities (Patijn, 1990 and Acioly, 2001):

- Revitalising the economy of the city: As a complex organism, the longevity of a city is determined by the success of economic sectors operating within its boundaries. Businesses and residents can only be attracted if a city has appealing opportunities. A city, which has a big consumer market, would attract businesses and new residents, hence increasing the consumer market with various new segments emerging in the overall market. This vicious circle continues, depending on the relative competitiveness of the city in comparison to its rivals;
- Revitalising the social and cultural life of the city: As mentioned earlier, cities are social structures where manifold human interactions become an inevitable aspect of everyday life. A successful revitalisation scheme, therefore, needs to consider improvements to this aspect of the city life;
- Conserving old and adapting new in the same spatial map: The schemes to use derelict sites and buildings for new uses may create new business districts or tourist zones in abandoned urban sites. However, one important issue to be considered by local authorities is that the overall architectural characteristics of cities should not be spoiled when derelict buildings are restored and new ones are constructed. Revitalisation schemes need to consider the conservation of heritage sites and the creation of new green areas and public places;
- Managing a revitalised city: Revitalisation schemes require continuous and coherent management and marketing applications. Sustainable growth of a city cannot be achieved with ad-hoc and short-term plans. An integrated approach, which should be supported by public and private organisations and inhabitants, is needed to create a positive image and to attract businesses, residents and visitors.

Revitalisation schemes, therefore, must seek solutions to industrialised cities' problems by recognising them as economic, social and ecological organisms. Only then can these schemes be coherent and strengthen the image of deteriorated urban areas.

2.3.3. City and Globalisation

At the start of the last decade of the 20th century, a new era emerged which made global transactions the dominant factor in the economic structure of spatial and social communities. In contrast to previous stages in the evolution process, cities had the chance to market their products in an international arena by emphasising their distinctive economic atmosphere and quality of life in order to gain economic advantage over their competitors. The factors which started this *'globalisation'* process include reformation of continental blocks, changes in country borders with political and economic impacts, shift to the informational economy and advanced transport technology (Bramezza, 1996).

Among the communities on a geographical scale, cities have arguably the biggest potential for control over the globalisation process, while they are also affected greatly by the overall impacts of new trends and demand patterns. The fast and advanced communication systems, multiform transportation facilities, mass population and diverse economic characteristics make cities important places in which social interactions and consumption mechanisms shape the cultural and economic preferences of the global market. Therefore, cities are the main nodes in the global information exchange network. The consequences of global restructuring are not only reflected in cities, but also emerges within them (Byrne, 1997 and Daniels, 2004). This new role of cities was strengthened by their shift from being places of production to *'massive communication switchboards'* following the decline of manufacturing industries and the growth of information technology (Hannerz, 1993).

De Swaan (1988) predicts that the concept of *'a global city'* where people can easily collaborate with other communities in distant places and reach information sources almost everywhere, will develop further in the future. Processing knowledge and improving transportation infrastructure will remain the main tasks of local authorities. However, the long-term consequences of the globalisation era for urban life are yet to be seen. There is no guarantee that cities will be the only spatial establishments to benefit from the global economies of scale and increased information exchange. Since information exchange between people and businesses will be even easier, the need to be located in commercial hub cities in order to be close to both markets and other businesses may decline.

Cities, which aim to be among the leading business centres in the future, therefore, need to consider some of the realities of the globalisation procedure. A continuity of success can only be sustained by effective and substantial management and marketing approaches approved by all stakeholders, ranging from industry leaders to social communities. A stable political, economic and cultural city environment is subject to influence from external and internal factors. Thus, analysing the city's strengths and weaknesses and monitoring the changes occurring outside the city becomes a crucial task for local authorities. Only then can the city's advantageous position in comparison to its competitors be perceived as an international decision-making centre that attracts international capital. A strategic organisational plan to regulate the production and distribution activities in each economic sector is also required to prepare the city for international competition (Batur, 1995 and Acioly, 2001).

With regard to the globalisation process in urban areas, one last comment to be made is that cities constitute a diverse and huge labour force, which is reinforced by their heterogeneous population structure. As Batur (1995, p.xxiv) notes:

> *'The coexistence and interaction of different cultures is the most profound, significant, and powerful characteristic of a world city'.*

In fact, the globalisation move has improved the international division of labour in cities even more. Cities have started to benefit from international labour sources enormously. The snowball effect of some particular organisations' existence *-i.e. banks, insurance companies, stock exchange centre-*, is that they attract more international organisations, hence influencing the supply of labour both qualitatively and quantitatively.

2.4. Tourism in Cities

Although subject to prevailing dynamics of investment and decision-making mechanisms in individual cities, tourism has proved to be an important component of revitalisation programmes of industrialised cities. While new attractions and recreation areas are being built to accelerate development in the cities where tourism has not been the traditional industry, many have already been embracing precious heritage sites and cultural activities since their early settlements.

In fact, in many cases, cities owe their existence and importance to being culture centres embracing historic sites, which were built over centuries in accordance with the geographical importance of certain localities. While cities have continued to move forward on their transmission process through time, historic sites and buildings like cathedrals, palaces, temples and mosques, have retained their importance as the essential supply components of urban destinations. In addition to heritage sites and historic buildings, contemporary buildings such as theatres, concert halls, conference centres and shopping malls help complete the tourism scene in major cities. As a result of such establishments, visitors become one of the main parts of the human interaction and concentration in cities.

The supply side components of urban destinations, which are required for successful tourism development, will be examined later in this chapter. In this section, the emphasis is on the tourism sector in cities as an academic concept, and to this end, previous research is scrutinised. Research on projects related to urban tourism and tourism activities in cities used to criticise the lack of sufficient literature on the subject at the start of 1990s (Ashworth, 1989; Singh, 1992; Page, 1995; Law, 1993). Ashworth (1989) claims that urban tourism had not been paid the attention it deserved and was superseded by the *'rural-bias'* of the tourism literature. According to the author, tourism and geography researchers had failed to fill the gap on the quantity of the literary and the quality of the theorising about urban tourism. This has led academics to find reasons for the neglect of cities as a research topic in the field of tourism. The leading reason was explained as the approach to tourism as a research field for rural areas, which was endorsed by academics working on both urban geography and tourism geography. Such a supposition ostensibly relied on the empirical observation proving the one-way tourism movement, which is generated at urban areas and flows towards rural destinations. The potential of urban areas as tourist destinations and the facts of large visitor numbers and the concentration of tourist activities and facilities in cities were overlooked.

According to the author, the neglect was also due to the difficulty of studying tourism in urban areas. The wide variety of tourist activities and facilities embedded in urban complexes, the numerous interaction between tourism and other economic activities in urban economies and the intermix of visitors with different motives, spatial origins and patterns of behaviour, complicate the nature of tourism in cities. In fact, since tourism is just a single part of the multifunctional urban complex, it is not easy to segregate and to isolate tourist zones and districts on urban maps. Blank (1994) further states that high population density, access advantage with the provision of manifold transport modes, concentration of many economic activities including the headquarters of various manufacturing and service industries' leading organisations and, being centres of government and culture also complicate the structure of an urban form. Hence, until the 1990s, tourism in urban areas was examined only by a few studies, which mainly focused on location patterns, urban distribution and local policy planning (Singh, 1992).

In contrast to the pre-1990s, the era of urban tourism research started in the 90s. Although there is a dominance of urban tourism studies on American and European cities in the literature, the number of research studies undertaken on the subject has increased (Van den Berg et al., 1995; Page, 1995; Law, 2002). Urban tourism as an emerging research phenomena (Ashworth, 1992; Law, 1996a; Page, 1995; Vetter, 1986; Mullins, 1991; Haywood, 1992; Fainstein and Gladstone, 1999; Pearce, 2001); urban tourism development and planning (Broadway, 1997; Mazanec, 1997a; Hall, 1998; Singh, 1992, Page, 2002); tourism as a catalyst in the revitalisation programmes of the post-industrial cities (Spink, 1989; Millspaugh, 1990; Law, 1990, Acioly, 2001); marketing and managing tourism in urban destinations (Tyler et al., 1998; Murphy, 1997a; Geerts, 2000; Ashworth and Tunbridge, 2000; Hopper, 2002; Page and Hall, 2003); urban attractions (Townsend; 1992; Hall, 1997b; Hughes, 1999; Jansen-Verbeke, 1997; Shoval and Raveh, 2004); and sustainable development in urban tourism (Hinch, 1996; Barke and Newton, 1995; Allwinkle and Speed, 1996) are among the most popular research subjects of today's academic literature. However the demand aspect of urban tourism is still not fully understood and studied. The methodological difficulties of analysing multi-functional tourism activities and facilities and various visitor types have resulted in a limited number of research projects on the demand characteristics of city destinations.

2.4.1. The Characteristics of City Tourism

Although basic tourism planning and management matters can surely be applied to city destinations, no urban tourism research can reach accurate conclusions without taking into account the unique characteristics of urban mechanisms. The characteristics of urban tourism derive from both the distinctive nature of urban structures, and the manifestation of tourism in such complex settlements. Some of the common characteristics of city destinations drawn from the empirical and theoretical research existing in the literature are listed below (Ashworth, 1992; Page, 1995; Wober, 1997a; Law, 2002; Page and Hall, 2003):

- Urban destinations are both ***multi-sold*** and ***multi-bought***. Cities offer a range of tourist products and services, which create diverse product packages. That can embrace all sorts of visitor attractions and facilities, ranging from restaurants to transportation services, from museums to shopping malls and from conference centres to catering firms. Hence, cities that appeal to diverse market segments, may be interested in different aspects of the product package on offer. Shoppers, cultural visitors, visitors on education trips, business visitors, short-break trippers, domestic visitors and overseas visitors can all be found in many major city destinations. While these varied types of visitors purchase their own product packages before their arrival, their experiences in cities may be enriched with additional products and services sold during their visit to the city. As a consequence, diverse product packages, which a given city can offer by combining different products, are sold to assorted market segments.
- City destinations are often the ***tourism gateways*** to their surrounding region. Destinations which associate themselves with major city destinations in joint marketing activities benefit from their high volume visitor numbers by drawing some day trippers who stay in urban areas and take part in one day excursions to nearby areas. This is clearly true mainly for those visitors who do not have time pressure on their visits to cities, while short-stay

visitors, another important and growing market for urban areas, tend to explore only one particular destination.

- The sheer scale of heterogeneous products and services sold to visitors and locals in urban areas make each city destination ***a unique product cluster*** especially when tourism-based services are combined with the history, economy and socio-cultural characteristics of individual cities. Therefore, although there may be some similarities between some urban functions and tourist services like accommodation types and transport modes, each city destination is different especially when their size, location, heritage and economic and social functioning are considered.
- Developing and marketing product clusters of city destinations cannot be directed by a single authority. Leading tourism organisations aim to plan the development of the sector. But realising tourism plans requires combined efforts from various bodies and organisations. Residents, private and public tourism organisations and other urban authorities need to co-operate to initiate development projects and to effect marketing activities by creating a one-voice strategy. So called ***over-fragmentation of tourism stakeholders*** in urban areas makes ***partnerships, alliances and co-operation*** imperative in the process of tourism development and marketing.
- Despite the fact that tourism related products and services of cities are manifold, they usually concentrate on certain locations and create invisible boundaries of ***tourist zones or districts***.
- Tourism in cities, compared to traditional holiday resorts, is an ***all-year-round activity*** with reasonably equal numbers of visitors spread through different quarters of the year. The seasonal and high-volume fluctuations in the number of visitors which is one of the main dilemmas of sea-sun-sand resorts, is not experienced by city destinations due to their diversified demand and supply aspects.
- By their very nature, in many cases, cities embrace more than one economic industry, hence their economic function depends on ***the co-existence of various manufacturing and service industries***. Whether the economic and social richness of urban areas is tourism-related or not, sustainable tourism development and management can only be fulfilled depending on the success of local authorities in being able to integrate tourism into the overall urban economic structure. Neither tourism nor the other industries should hamper each other's functioning. Opposition to tourism can easily be raised by both locals and entrepreneurs, if concentrated tourist flows into certain districts impair the living standards of the city.

2.4.2. Tourism Development Process in Cities

As centres of trade, government and education, major cities have always had a pivotal importance in the travel industry. Law (2002) explains this with the urge to concentrate stations and junctions of transportation networks in urban locations, which as a result enriched the hub-destination status of major cities. Waterfronts and near to city gates were the favourable locations to locate hotels in cities due to the accessibility advantage. Following the technological developments in the railway and airline sectors, tourism developments continued to evolve in the surroundings of major stations and termini in such hub destinations.

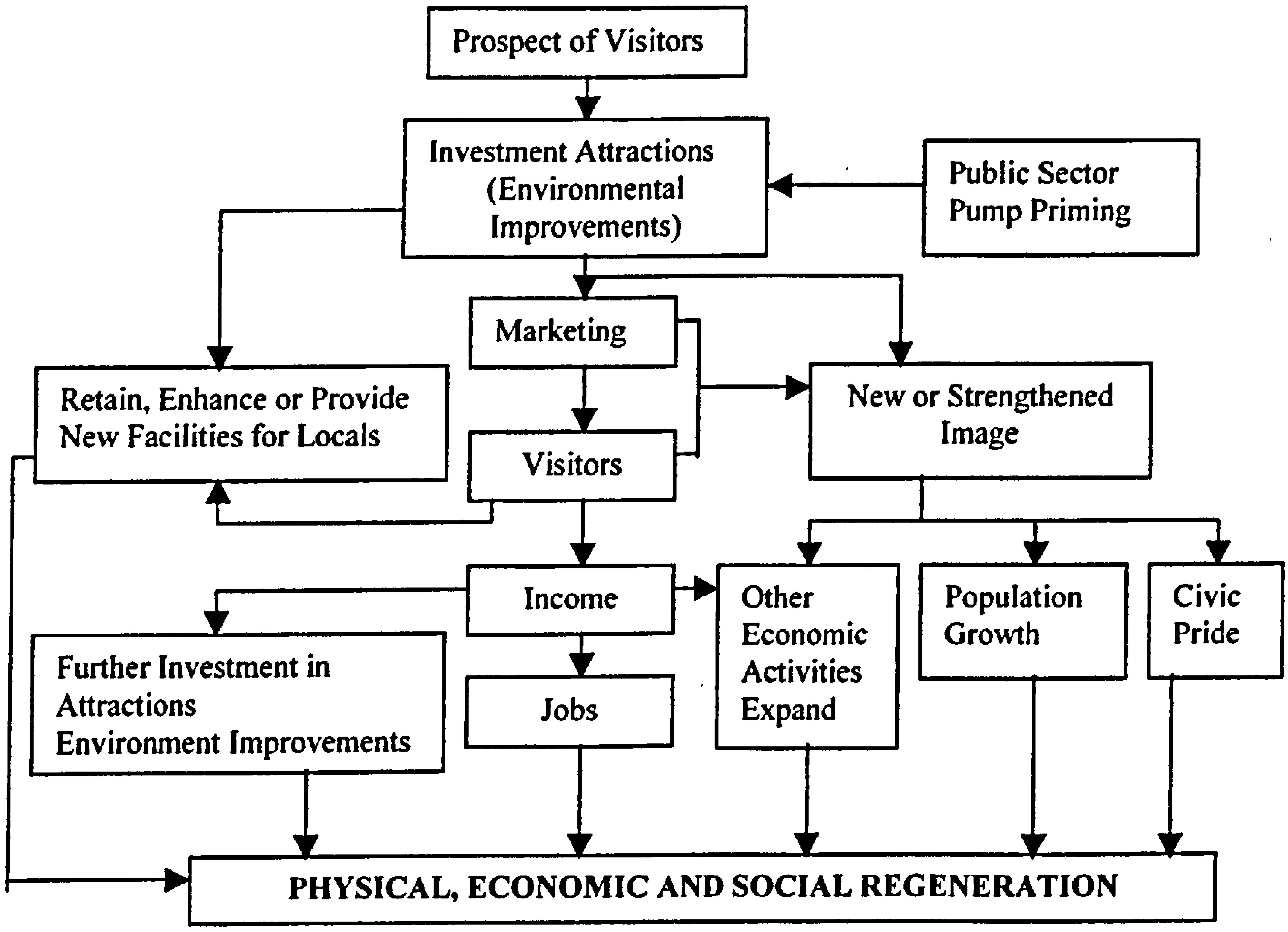
The developments of transportation services tend to focus on the provision of better linkages either between such cities and their hinterlands or between various urban locations. As such, tourism and transportation manifest their raison d'être in urban areas with the help of mutual benefits they have gained in the past and will continue to gain in the future (Law, 2002).

Such an interdependent relationship between the two sectors caused a heavy traffic of government officials, businessmen and education travellers to the major cities and then encouraged entrepreneurs to move toward tourism investments as early as the beginning of the 19th century (Stalski, 1986). However, as Stalski notes, the attempts of such entrepreneurs were not in-line with the town planning policies, since such policies rarely suggested the development of tourism infrastructure in accordance with other urban improvement and expansion policies in those days. Haywood (1992) argues that it was usually the tourism sector itself that developed autonomously around the major trade centres and transport hubs without coherent and continuous planning and development strategies.

In contrast, since the early 1980s, major cities have been taking tourism development more seriously and trying to strengthen the sector with strategic plans and tactics hinged upon the existence of quintessential factors for tourism development (Judd, 1999; Page and Hall, 2003). While such quintessential factors include social, cultural, economic and environmental endowments of urban areas, their use as tourism assets depends heavily on the success of public and private authorities in integrating tourism development into overall town planning. Otherwise, the prevalent trend in the tourism sector to turn a developing urban destination into *'a mass tourism centre'* can create problems, which may, as a result, outweigh the beneficial effects of tourism. Thus, city authorities should use long-term planning strategies in order to eliminate or to mitigate the problems caused by concentrated tourist flows (Haywood, 1992).

In the literature, the studies on the process of tourism destination development are numerous (Van den Berg, et al., 1995). Although there may be some differences between the phases of process suggested by each study, they usually present a compatible development flow. Because of its intuitive approach to destination development, which fits perfectly well into the aforementioned information on the development of tourism sector in urban areas, the development process described by Law (1995) is shown here (*see Figure 2.2*).

Figure 2.2. Urban Tourism Development Process



Source: Law (1995), p.29.

As a starting point of the tourism development process, Law (1995) relates the increase in tourism investment in a destination to the equal increase in tourist arrivals. The increase in both demand and supply sides of the sector is then followed by the interest of public authorities and private organisations to promote and expand the sector. At this stage, the established image based upon well-known historic and cultural richness of a city play an important role in putting the city in an advantageous position in a market full of competitors. As Inskeep (1991) notes, in some cities where the tourism sector is developed implicitly and autonomously, the policy of city authorities may be to confine the development of the sector with no further financial sources. This way, the effort of authorities would be to manage and market the sector with the already existing tourist attractions and facilities. Inskeep shows Zurich and Edinburgh as examples for such development practices.

However if a city destination continues with further investments and improved labour force and environmental and social aspects, its reliance on the sector becomes explicit. While the development process progresses with additional funding, the interruptions caused either by external *-i.e. global recessions, natural catastrophes-* or internal factors *-i.e. insufficient infrastructure facilities to attract and accommodate more visitors-* may arise as interfering factors in the development of the destination. The efforts of city authorities to revitalise post-industrial cities in developed countries with the help of tourism can be explained by the characteristics of this phase of the process (*see Section 2.4.4.1*). The strategic planning and policy making to revive industrialised cities with waterfront developments, establishment of cultural and conference centres, expansion of the recreational activities both for visitors and locals and efforts to market urban destinations have succeeded in some, but have failed in some others (Inskeep, 1991).

At the final stage, if a city succeeds in sustaining its tourism sector with effective and coherent development plans, it can gradually emerge as a tourist destination both in national and international tourist markets depending on its perceived image and comparative advantages as *'a spatial tourism nucleus'* in terms of its *'centrally'* situated tourist attractions and transportation links (Schuurmans, 1986). Moreover, a city with a well-established tourism function can even spread its success to the hinterlands and become the focus of regional tourism development plans as *'a gateway destination'*.

Another issue to be considered when taking decisions to develop urban tourism is the competition between the sector and other economic industries for limited urban space. Such competition becomes more discernible in cities where tourism has not been one of the major industries throughout the development process of urban economic systems. During the heydays of manufacturing industries at the start of the 20th century, allocating space in urban areas for tourism and recreation activities seemed to be neglected by city authorities. Van der Heijden and Timmermans (1990) explain this fact with the ostensibly higher profit/cost ratios of major manufacturing industries. It was thought that such industries provided better employment opportunities for locals and economic sources for cities, which then enabled urban mechanisms to reach their targets in development programmes and place them on the global trade map.

The multi-sided effects of tourism on urban economies had been long overlooked and were not recognised by public or private organisations until the last quarter of the century. The result was the dominating office buildings, trade outlets and factories both in the core and in the hinterlands of urban areas, while cultural and recreational activities only survived depending on their direct economic revenues and were mainly for the use of residents. However, the negative outcome of such development was the increase in land values, which was mainly influenced by the immense demand for inelastic and finite supply of space in urban areas. In his research on leisure development in limited urban space, Spink (1989) divides a city into various zones according to their centrality, which reflects profitability and utility of the functions located in each zone (*see Table 2.1*).

Table 2.1. Land-Use Zones and Leisure Uses in Urban Areas

Area	*Values and Leisure-use*
Central Core	High rents and land values, Intensive and competitive land uses, Commercial uses dominate. More extensive leisure facilities due to historic inertia.
Central Business District	Commercial leisure facilities are market-based, intensively and profitably operated, Public leisure facilities are heavily subsidised.
Fringes and Residential Areas	Lower rents and land values, Lower density of land use, Mixed land uses in transition between core fringe and residential areas, Some commercial leisure activities but smaller scale, less intensive in operation.

Source: Based on Spink (1989).

With the attention of decision-makers in cities turning into tourism as a catalyst in revitalisation programmes, the need for allocating *'green'* space for recreation activities and using public space for new tourism developments has increased enormously. While the rising costs of land-use in central locations forced manufacturing industries to relocate their outlets outside cities, derelict sites and buildings seemed to be ideal spots for new tourism and recreation developments. The examples of redevelopment of waterfront sites in many developed countries with river-side walking areas, parks and observation points prove that public authorities have changed their opinions on the priority to be given to economic sectors in today's land-use competition in cities.

Today, the competition for land in cities among economic sectors is still in favour of those sectors, which use the allocated space intensively and profitably, and tourism is among the winners in many cases. Nevertheless the applications followed in the past resulted in the restricted recreational infrastructure available in urban areas and put pressure on redevelopment of tourism in the post-industrial cities (Spink, 1989). Spink shows the dilemmas faced by British cities like Leeds and Bradford as typical examples of such a move from the dominance of manufacturing industries in local economies to tourism.

Besides, the need to locate tourism attractions in accessible central districts becomes an obstacle. While the cost of central locations is higher, the urban space for recreation purposes is far more limited than in rural destinations. Thus, even today, high land values directs new developments toward the options which are presupposed to be commercially successful in a short period of time. City authorities find it difficult to convince entrepreneurs to take decisions in favour of tourism developments just because of their social and cultural benefits to locals and visitors. This is why the development of many recreation and tourist facilities and activities in urban areas usually depend on public support both financially and operationally.

2.4.3. Classification of City Tourist Destinations

Classifying city destinations is not an easy task. This is mainly because of the extensive variety of tourist products and services offered in these destinations. As the product packages embracing diverse tourist attractions and facilities with unique urban characteristics are already complicated in each destination, categorising them according to their tourism sector may be misleading. As Law (1996a) indicates, in practice, the vague definitions of city destination types suggested by various typologies in the literature, fail to clarify the boundaries on what sort of elements to be found in each destination. They just help us to understand what makes some destinations different from others.

The difficulty of classifying a city destination lies in the fact that it may fit more than one category due to multi-sided product packages and demand characteristics. Besides, city destinations are considered to be *'living mechanisms'* or *'product packages with unique life cycles'* evolving through time, which has explicit and inevitable effects on both the tourism sector and the urban mechanism as a whole. At the different phases of such a development process, the tourism function of city destinations may show significant polarities on time-scale, which makes it impossible to categorise any city in a group of similar destinations.

Notwithstanding the difficulties, classifications help academics to approach the urban tourism research field with a focus, albeit in general terms. In the literature, there are some studies classifying city destinations according to (Mitchell, 1994, Page, 1995, Townsend, 1992 and Hinch, 1996; Page and Hall, 2003):

- their importance as hub-destinations;
- the dominant tourist attractions with major *'pull-in'* effect;

- their importance as government centres;
- the development process of the tourism sector and;
- spatial and population sizes.

According to these authors, the distinctive characteristic of the first group is that they are located on the major trade routes and benefit from stations and airports, which place cities at the centre of the regional, national or international travel networks. Examples include London, Paris, New York, Dubai and Tokyo.

Extensive transport networks also enable cities to expand spatially which induces the development of travel links to their hinterlands and other urban areas. Such a development in transportation helps some cities to evolve as metropolitan districts with regional, and sometimes national and even international importance. That is why the importance of tourism and transportation is considered to be highly related to the spatial size of city destinations. Indeed, high population levels of urban agglomerations correlate strongly with the large number of visitors travelling to city destinations with the purpose of meeting friends and relatives. Hence, as Burtenshaw (1981) indicates, it is not surprising that the major European cities are also the major tourist destinations such as London, Paris and Rome.

Van Der Borg's (1994) research on the advertisement of European cities in tour operator brochures also emphasises that most of the *'classic'* city destinations in Europe are the capitals including Amsterdam, Budapest and Dublin. The reasons for capitals to be the most visited city destinations may be numerous, the most obvious being that: capitals are the national gateways to their country; the existence of government and the concentration of trade organisations attracting business travellers and; their developed infra- and supra-structures enabling them to accommodate more visitors and to employ more staff chosen from the ample labour force. As Burtenshaw (1981, p.164) concludes;

> *"Capitals are endowed with a disproportionate share of accommodation, museums, theatres and national art collections and serve as national symbols so that to visit Britain but not London, or Denmark but not Copenhagen, becomes unlikely".*

Although tourism is one of the major income sources in these major city destinations, the urban economy's dependence on tourism is not as salient as it is for some small towns where the local economy is wholly tourism-dependent. Such towns usually base their tourism sector on a well-established single tourism form and their success hinges upon the continuous tourist flows attracted by strategic management and marketing policies. The target market and demand characteristics for such destinations are rather rigid compared to metropolitan areas where various attractions and tourist products target different market segments. However, in any case, the image of the city is usually based on a well-known tourist attraction, which plays an important role to identify the *'theme'* of the city's tourist product package. Historic cities, cultural cities, sport towns and shopping towns are typical examples. Business travel to the major financial centres *-i.e. Frankfurt-*, fair towns *-i.e. Hannover-* and cities with international administrative functions *-i.e. Brussels-* can be a major tourist generating factor too (Page and Hall, 2003).

According to Van der Borg (1991), the process of the tourism sector's development in city destinations is used as a method of classification especially to distinguish the post-industrial cities from the others. Tourism, as a catalyst, has taken its place in the revitalisation programmes of such cities following the decline of the traditional manufacturing industries and the need to search for new financial sources for local economies. New tourism developments were encouraged by public authorities when the economic crisis started in the 1980s and the need to improve the living standards and the image of such cities forced cities to run exclusive marketing campaigns.

Government-funded waterfront re-developments, the expansion of museum and art galleries and new convention and congress centres have been the initial reactions to a negative image in many British and American cities. However, not all post-industrial cities have succeeded in their attempts to develop brand-new tourist attractions, which can grasp an effective share from the market. Baltimore and Glasgow, on the other hand, stand out as the most successful and imitated examples (Law, 1990; Millspaugh, 1990; Broadway, 1997).

In the light of the above given information, the following list of city destination groups can be contrived from the typologies existing in the literature (Page, 1995; Townsend, 1992; Law, 2002). While there may be some overlaps in each category *-i.e. a historic city may also be a hub destination-*, the only exception to this is the capital cities as the factors required to become a capital city are more than just tourism-based.

* Capital cities and metropolitan cities -London, Paris, New York;
* Cultural cities - Florence, Edinburgh;
* Historic cities - Canterbury, Venice, York;
* Revitalised industrial cities - Manchester, Baltimore, Glasgow;
* Specialised cities - pilgrimages in Jerusalem, gambling in Las Vegas, winter sports in Lillehammer, conferences and excursions in Birmingham, etc.

2.4.4. The Role of Tourism in Cities: A Revitalisation Tool

Following the on-going global recession of the 1980s, the efforts of urban areas have been to transform cities into post-industrial city destinations on international travel networks by attracting visitors, businesses and residents. Due to unused derelict sites and buildings, high unemployment rates and lack of income sources, some cities mainly in the USA and in Europe, concentrated their efforts on the development and improvement of their tourism sector. The success that these early efforts achieved, has encouraged many other urban destinations to re-evaluate tourism's benefits for local economies, and to give it the attention it deserves.

2.4.4.1. Tourism as A Catalyst in Cities

Tourism has been proved to be a sector, which can enhance the viability and the living quality of urban areas, if managed and developed effectively. In addition, the economic, social and cultural benefits of the sector cannot be disproved providing that a positive image for a given city is established and sustainable tourism development plans and policies are practised accordingly. In other words, tourism can help to: boost civic-pride; provide new employment opportunities; attract new investments; enhance the overall image of cities; conserve urban environment and protect historical buildings and heritage sites; improve infrastructure facilities and; most importantly encourage the collaboration between all sorts of organisations and communities within an urban system. Table 2.2. lists some of the main reasons for the tourism's existence in local development plans and policies.

Table 2.2. Reasons for Developing Tourism

Economic	* Employment	* Foreign Exchange	*Boost to other sectors
Social	* Cross cultural exchange		* Stimulation of new attitudes
Development	* Infrastructure		* Recreational facilities
Sense of national pride or identity		* Modernisation	* Traditional culture
Support for Conversation	* Environmental	* Ecological	* Cultural

Source: Laws (1995), p.137.

For those cities, which have chosen tourism to replace the decaying manufacturing industries in their urban cores, the tourism sector is expected to play a *'catalyst'* role in order to give an impetus to interrupted economic growth. In fact, as Barke and Harrop (1994) argue, concentrating on tourism in order to revive local economies was not the only management strategy pursued by urban authorities. Modernising the operation of manufacturing industries with technological improvements, hence mitigating the negative effects of the recession, is also possible. Besides, tourism cannot be seen as the only alternative for the replacement of traditional industries. The globalisation process has made the hi-tech and service industries so popular that the competition to take part in the global communication network and to locate advantageous businesses and international organisations' branches within the boundaries of a city has become fierce. Cities, which can manage to embrace all these alternatives in addition to tourism within their urban complexes, would surely be the ultimate beneficiaries. In any case, the need to harmonise tourism with other urban functions and services is crucial for the sector to be an effective *'catalyst'*.

How tourism can accelerate economic growth through attracting new investments, creating new income sources, providing employment opportunities and enhancing the image of a city is complex. Clearly, if tourism does not exist, promoting a city as a tourist destination would not be enough. Although the sector is known by its *'intangible'* characteristics, cities need some tangible substances to foster visitor flows. A city destination can only exist, if it embraces unique visitor attractions, sufficient infrastructure facilities and transport networks within its product package. The cities in today's international visitor markets continue to add more attractions to their supply side components in order to draw different market segments. In this instance, cities in the process of transformation from being manufacturing industry-oriented urban economies to tourism-oriented urban complexes, may rediscover their heritage prosperity and need to develop new tourist attractions. In fact, Law (1990) argues that for tourism to play its *'catalyst'* role, the development of a *'mega'* tourist project should be considered by local authorities, if there is not one already drawing visitors to the city.

This is how the most popular example of *'a revitalised city'* in the literature *-i.e. Baltimore-* improved its urban environment, its tourism income and its image (Law, 1990; Millspaugh, 1990; Broadway, 1997; Judd, 1999; Hannigan, 1998). By transforming its harbour into a lively market place by the developments of waterfront projects, the city boosted its visitor arrivals. But the most important thing as emphasised by Law (1990), is that it took almost 15 years for the city to develop, plan, project and build the new water-front attractions before it received its initial visitors. Baltimore's successful development was soon repeated by other waterfront locations both in the States and in Europe including Birmingham, Cologne and Rotterdam (Law, 1993; Millspaugh, 1990; Richards and Wilson, 2004). However, many of these cities with some exceptions could not achieve the success Baltimore had, mainly due to the fact that they were imitations of the original and duplications of each other (Meyer, 1990).

Many researchers have criticised urban revitalisation projects on different grounds. Huxtable (1997) and Zukin (1998) argue that it is the modern architecture built in the form of high-rise buildings for such projects, which ruin traditional and unique architectural characteristics of urban environments. For other scholars, the architecture is not as troubling as the social control associated with tourist spaces. Woodward (1993), for example, cite that public spaces and new recreational sites created according to revitalisation projects are not always accessible for local people, especially for women, the young, the elderly and the disabled ones. Taking this argument further, Davis (1990) and Fyfe (1998) argue that the privatisation of public space results in classism, racism and ageism in the urban landscape.

In order to mitigate such negative impacts of regeneration efforts, the use of cultural policies as opposed to creating new suburban districts have been recommended as a redevelopment strategy. The book edited by Bianchini and Parkinson (1993) draws attention to cultural policy and urban regeneration in eight European cities and shows the interrelation of culture and regeneration in former industrial cities such as Glasgow, Hamburg and Bilboa. The rationale to culture as a redevelopment strategy evolves around the possibility of fostering local economic development through tourism, while supporting the quality of life for residents. Law (2002) further notes that cultural activities encourage historic preservation and add vitality to downtown streets, which as a result strengthens the competitiveness and image of the city concerned. Whitt (1987), on the other hand, argues that cultural policies for tourism development purposes are usually the result of alliances between large corporations, developers, banks and arts groups, and respond more to speculative interest than to the promotion of culture for its own sake.

To conclude, no matter which policy is chosen, it is clear that using tourism as a catalyst requires systematic planning established by the participation of all urban actors. Although revitalisation schemes embracing tourism, leisure and recreation activities can help balance the economic well-being of urban areas, the attention should be paid into maintaining the exotic, exciting and vibrant characteristics of cities as well as considering the needs of locals as well as investors and visitors (Sassen and Roost, 1999; Page, 1995; Urry, 1995).

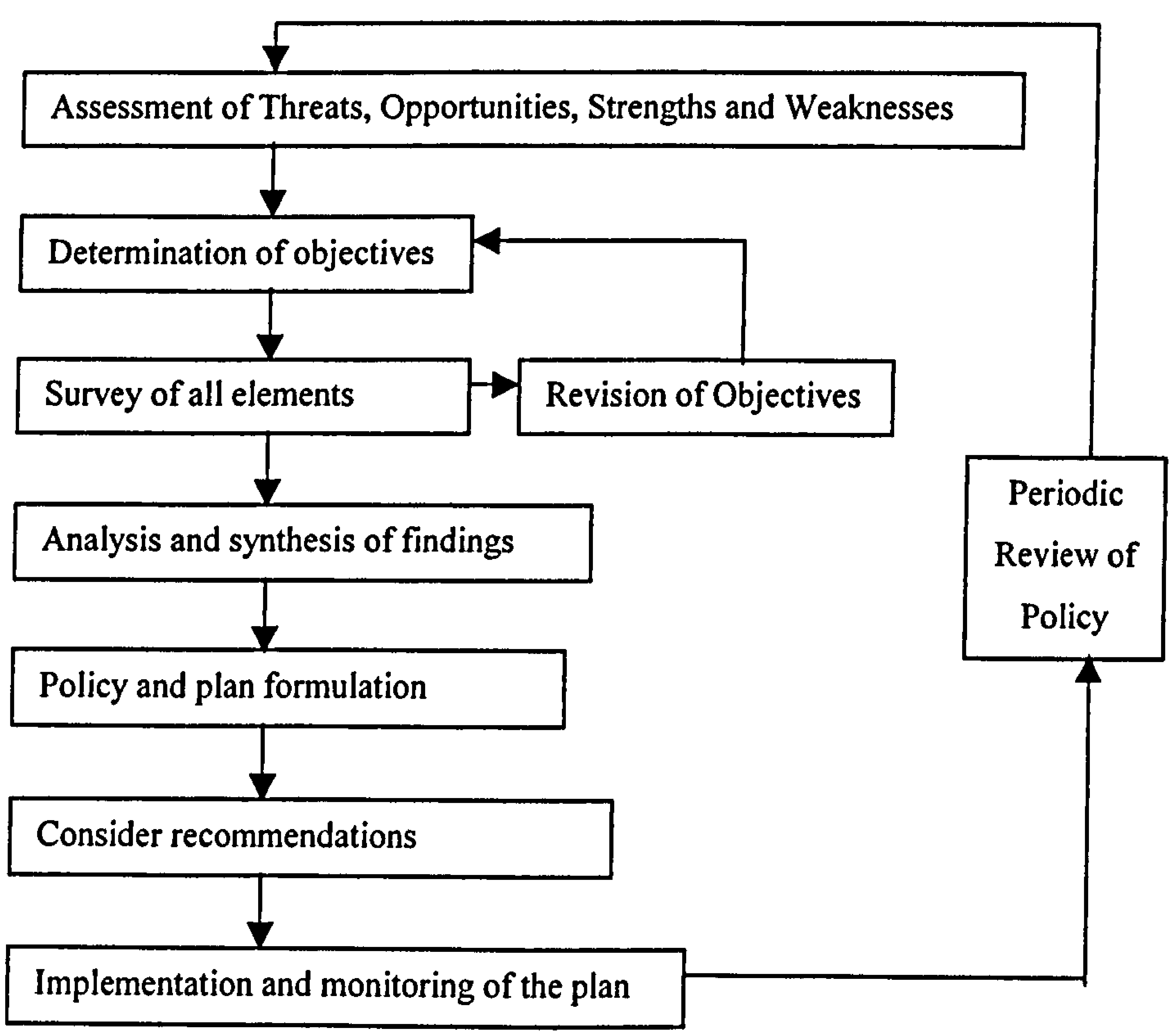
2.4.4.2. Tourism Policies and Planning in City Destinations

As mentioned earlier, with the decline of manufacturing industries, the problems of cities have become more apparent than ever. The poor quality of life, traffic congestion, unemployment and suburbanisation were, and still are, the major obstacles along the development process of major cities. The lessons learnt from the decline have forced city managers to consider more strategic and long-term plans to revive their economies to place their city on the map again.

For tourism to play its catalyst role in deteriorated urban areas, the development process of the sector should ideally be kept in continuous control by local authorities. The fierce competition in international tourism markets has proved that the growth of the sector cannot be achieved spontaneously without appropriate planning to sustain both the demand and supply sides of the tourism function of city destinations. Thus, as Bramezza (1996) emphasises, the tourism organisations and local authorities of major city destinations now approve the benefits of strategic planning, which needs to be prepared individually for each destination in consideration of its unique characteristics.

Figure 2.3. shows the different stages of local tourism planning process. In such a process, Page (1995) notes that local planning authorities need to consider several components of the tourism sector including: tourist attractions and activities; transportation; accommodation; institutional elements; tourist facilities and services; infrastructure; and the national and socio-economic environment. While such ingredients of the product packages of city destinations represent the supply side of the sector in tourism plans, demand characteristics also need to be taken into account like domestic and international markets and residents.

Figure 2.3. The Tourism Planning Process



Source: Based on Page (1995) and Williams (1998).

One important issue to be noted with regard to tourism planning in urban areas is that managing and planning tourism developments in cities are the responsibilities of different organisations on various hierarchy levels (Page and Hall, 2003). Local, regional and national authorities may be involved in the management process of urban tourism forms, but the sole responsibility for planning tourism should be given to the leading tourism organisations on the local scale. Surely, government political strategies on the overall economy of a country would affect the local planning process of individual cities and towns, and this would strive for the encouragement of the local authorities to establish their planning targets on-line with the government's overall economic, social and environmental policies. In fact, the influence of governments on the local planning process can be immense, if public funds, loans, aids or grants are needed for the functioning of local plans. Therefore, the interrelation between governments and local authorities should be established in order to ease the achievement of urban plans' targets.

Besides governments and their concerned departments, local authorities need to co-operate and negotiate with all of the other concerned organisations when tourism planning is undertaken. There is no doubt that for tourism planning to be successful, tactics, strategies and policies should be identified in a way that all the shareholders have insight on the sector's coherent and shared aims and goals. This means that a consensus on tourism plans and policies should be established by combining the views of the sector subgroups.

Considering the extensive variety of tourist service providers and organisations in urban areas, it can be argued that it is difficult to create a one-voice approach in cities. However, establishing partnerships stimulate shared and harmonised views in destinations. Besides, since tourism cannot be isolated within urban economic mechanisms, the interrelations and co-operation between the sector and other urban functions should be developed.

The tourism strategies of destinations usually evolve over time and need to be implemented with short, long and mid-term tourism plans. Since city destinations face changing demand characteristics with new segments entering the tourist markets in addition to the constant reformation of tourist attractions and infrastructure, tourism plans cannot be *'one-off'* investments (Shaw and Williams, 1994). Tourism organisations and policy developers should have the flexibility to adjust their tourism plans to changing circumstances. Nevertheless, empirical studies show that while short-term tourism plans receive the attention they deserve from the local authorities, long-term plans on which short and mid-term plans should be based, are often neglected (Van Den Berg et al., 1992).

Today, major city destinations of developed countries which consider tourism as an effective income-earner sector and place the sector on top of their priority list to sustain the viability of their urban economies, emphasise the importance of tourism planning and prepare *'action plans'* which consist of short and mid-term goals and aims for the sector (Law, 2002). In such destinations, tourism plans evolve on a *'project-by-project basis'* (Haywood, 1997). However, effective strategic planning without consistent long-term policies and plans may cause city destinations to impose temporary solutions to problems with long-term effects.

One other factor to be taken into account when designing tourism plans for city destinations is that urban areas differ substantially from other types of tourist destinations due to the variety of tourist markets drawn by a single product package on offer. This complex structure of the sector in urban areas requires special attention. When the supply side of the sector is included in the planning process with a consensus on the needs, wants and expectations of the shareholders, the demand characteristics of the sector should be carefully assessed prior to setting up tourism goals and aims. The attractions with pull-in-effects, the image of a destination, the demographic characteristics of tourist markets and the behaviours needs and wants of potential visitors all play an important role in providing hints to planners and decision makers on the market segments to be targeted, the segments currently existing in the market and the segments to be avoided.

The comparison provided by Page (1995) between Fordist and post-Fordist approaches to local policy and strategy development helps us to understand the evolution of leisure policy making in urban settings. The core of the comparison lies in the idea that cities, as package products for leisure consumption, have evolved from being *'homogenised products for mass consumption'* (Fordism) toward *'individually packed and tailor-made product packages for special interest consumption'* of individual visitors (post-Fordism). Furthermore, while Fordism mainly places tourism and leisure activities among the social responsibilities of public authorities, post-Fordism emphasises the need to develop urban areas as income-earner destinations, hence to approach the policy making process more systematically in consideration of the sector's overall socio-cultural and economic benefits to urban mechanisms. Table 2.3 summarises these two concepts according to their approaches in urban policy making.

While the tourism planning process has evolved over time and has been adjusted to changing economic, political, environmental and socio-cultural variables of evolving tourism destinations, the various tourism planing practices are categorised under five different approaches: boosterism; an economic sector-oriented approach; a physical/spatial approach; a community-oriented approach and; a sustainable tourism approach (Hall, 1998). Although it is not always easy to decide which approach befits empirical planning cases, they help academics to compare various tourism plans practised by destinations. Hence, while *'boosterism'* is considered to be an approach pursued by many industrialised towns to stimulate tourism as a catalyst for deteriorated urban cores, introducing environmental restrictions and conserving urban environment in tourism plans denote *'a physical/spatial tourism planning approach'* favoured by local authorities.

Table 2.3. Illustration of Fordist and Post-Fordist Approaches to Urban Regulation of Leisure

	FORDISM	POST-FORDISM
Local Government	Large-scale bureaucratic corporate policy and management approach to social provision and accountability.	Flexible forms of management and policy control; introduction of area management, decentralisation; enterprise zones, urban development corporations (UDCs) and compulsory competitive tendering bring with them new management approaches and structures.
Orientation of local government professionals	Bureaucratic and (liberal welfare) professionalism.	Entrepreneurial and 'industrial' professionalism (e.g. accountancy)
Central-local relations	Local determination/influence on local spending and taxation levels; local management and policy for major consumption services, central responsibility for economic planning.	a) *Service provision*: Central control of minimalist policy local concern for locally flexible and appropriate means of implementation. b) *Economic development*: Centrally devised policy implemented by local organs of the central e.g. UDCs and Enterprise Zones. c) *Taxation levels*: Largely decided centrally.
Leisure policy	Social democratic orientation. - Leisure opportunities are a right of citizenship, - Leisure investment may achieve externalities (reduce anti-social behaviour and improve health).	- Provide cultural infrastructure to attract investment from new industries, - Generate tourism multiplier effect, - Provide infrastructure for new cultural industries (in some authorities), - Provide safety net welfare services in inner city, - Minimise costs of achieving externalities.
Leisure policy rationale	Largely social with some economic benefits	Largely economic with some social benefits

Source: Bramham et al. (1993b), p.239 and Page (1995), p.15.

When locals, one of the major components of the tourism sector in destinations, are included in the decision-making process along with public and private sector representatives in order to satisfy locals' needs as well as visitors', tourism planning is considered to be developed with *'a community-oriented approach'*. Emphasising the economic benefits of tourism -*i.e. income and employment benefits*- in tourism plans, on the other hand, indicates *'an economic-sector-oriented approach'*. Finally, as Hall (1998) argues, integrating all of the above approaches to optimise the benefits of tourism to a given destination leads local authorities to execute *'a sustainable tourism planning approach'*.

To conclude, tourism planning for urban areas is a complex phenomenon, and thus must be on a scientific footing. The main purpose of tourism planning in city destinations would be to minimise the costs of the sector for urban mechanisms and to maximise its benefits. An ideal tourism development plan should be *'economically viable, socially responsible and ecologically sustainable'* (Singh, 1992).

2.4.4.3. The Quality of Life in City Destinations

Many geographers and economists have been recently using the terms *'globalised economies'* and *'global or world cities'* (Daniels, 2004). These terms have emerged in line with the improvements in information technology and transportation, and the cease of dispatching barriers between the different economic ideologies, which were mainly fostered during the second half of the 20th century. The idea of *'a global city'* finds its roots in the insight that economic functions of such cities are internationalised, and that interaction between major metropolitan cities around the world is at its peak.

Today, the new technological developments are put into practice firstly by global cities, which in turn have brought along *'the standardisation of many economic functions'* both in the way of administrating and utilising them. While the world has become smaller with the ease in accessing long-haul destinations, the competition to win more international business opportunities, forces cities to further adopt new technological appliances, an educated labour force, flexible policies and improved infra- and supra-structure facilities in their urban mechanisms. Besides the need for standardising certain functions of urban systems in order to be compatible with other *'global cities'*, the quality of life has emerged as an important element for success. Accordingly, the success in the global market is ideally experienced by such cities where the quality of life is considered to be satisfactory by locals, visitors and entrepreneurs.

There is no doubt that the quality of life in cities can be, in fact, a research topic on its own. However, in this research, the subject is evaluated with regard to its relation to city destinations and how tourism and quality of life can give rise to each other. Further analysis is especially difficult, since the perceptions of quality of life in each urban system differ according to the distinguishing social, cultural and economic characteristics of individual cities. Since tourism is thought to be enriched with the unique and traditional aspects of a given city, a comparison of the quality of life standards of any two destinations would take the risk of ending up with entangled and impractical conclusions. Therefore, a brief assessment is presented in this section to show the interdependence of quality of life and tourism in city destinations.

From the tourism point of view, inner-city districts where tourism attractions and organisations exist in large numbers should be evaluated separately from residential areas and business districts. Inner-cities are usually the centres of shopping, cultural activities, restaurants and other entertainment and recreation activities, hence are seen as important determinants of quality of life. A destination, which can provide more recreation and entertainment opportunities for both its residents and visitors, is considered a vibrant place. In other words, tourism developments help to reinforce the quality of urban life, if they are planned and administered effectively (Van Den Berg, et al., 1992).

Tourism developments help to increase the quality of urban life in two ways. First, city destinations can embrace varied tourism attractions and recreation opportunities, which would be appealing to different groups of both residents and visitors. Bringing together such diverse groups in inner-city areas makes city destinations cosmopolite agglomerations. This, as a result, boosts civic pride making locals proud of their cities and convinces new businesses to choose certain cities where employees would be happy to live and work. Second, tourism also helps to establish a better perception of the standard of quality of life in a city destination among potential visitors compared to other cities where tourism is not developed and marketed by local authorities. The more a destination is visited by diverse market segments, the easier it gets to encourage new market segments by providing acceptable standards of living, which visitors are used to.

To conclude, although it is difficult to measure, improving the quality of a city destination should be one of the main goals of local tourist authorities. As Haywood (1997) emphasises, *'quality'* should not only be associated with poor or bad tourism products and services. Instead, urban managers and tourism organisations should try to improve the overall quality of a destination by easing visitor experience processes and service provision performances. To do that, meeting both visitor expectations with actual visitor experiences and community and sector values with real-term benefits may be needed as *'quality measuring gadgets'* by local authorities.

2.4.4.4. Sustainable Tourism Development in Cities

The success of city destinations heavily relies on the positive image established, which is an agglomeration of all sorts of information, perception and experiences gained by potential visitors about a destination. In many cases, the essence of the image batch resides in the unique attractions of a destination with strong pull-in effects. Such attractions usually include historical buildings, memorials and heritage sites. The continuity and preservation of these unique attractions and other drawing elements of the product package, which a destination offers, guarantees the longevity of the sector to a certain extent, providing that other efficient measures are taken to sustain tourism within the overall economic structure of the city.

Given the importance of heritage tourism, the argument on the need for the preservation of heritage sites would be in vain. However sustainable tourism development does not solely mean the conservation of these sites and the protection of parks and recreation areas, as it is often and misleadingly considered by local authorities in practice. According to Hinch (1996), since urban tourism draws on social capital and urban environment, social, physical and cultural capital of the destination must be protected to sustain both the city and its tourism function. In his perspective, sustainable urban tourism is concerned with the maintenance of the characteristics of the community and; the preservation and protection of the built, natural and cultural environment of an urban area.

Law (2002) has a different but related perspective to sustainable development of urban tourism, and draws attention to: the concept of carrying capacity; sustaining built heritage and reducing air pollution. The concept of carrying capacity in urban destinations could be explained by negative impacts of large number of visitors on both tourism suprastructure and urban infrastructure (*see Section 2.4.7.3*). Van der Borg (1992), on the other hand, argues that sustainable tourism development should be assured through policies regarding product, price, distribution and promotion.

From the synthesis of such existing research, it can be argued that the prerequisite of sustainable tourism development is to adapt the sector to changes in local regional, national and international economic, political, environmental and social policies (Allwinkle and Speed, 1996). To do that, in the process of sustainable tourism development, tourist resources and products of destinations need to be evaluated within an urban mechanism in which other economic, social and governmental activities and facilities exist. Economic and sustainable regeneration of urban economies can only then be achieved. It is a fact that a tourism-oriented urban economy would have to face the needs of sustainable development sooner than manufacturing industry-oriented economies, since tourism actually manifests itself within and through the urban environment and uses its resources.

The understanding of the economic benefits of tourism by local authorities would lead to the need to maintain tourism incomes, hence to preserve the original aspects of the urban core, which draw visitors. For example, Lutz and Ryan (1997) indicate that, in the case of Birmingham, the strong commitment of the local authorities to encourage the tourism sector resulted in the development of new economic strategies, improvement of the urban environment and the adjustment of new attractions to this environment in addition to efforts to enhance the image of the city. Therefore, city destinations should:

- preserve and conserve the aspects of the tourist product package;
- enhance the quality of tourism resources;
- ensure that new tourism developments fit into the tourist product on offer;
- harmonise tourism with other economic and social urban functions and facilities, and to provide guidelines on the sustainable development of the overall urban economy and;
- establish a consensus among the shareholders of the sector on the needs of sustainable development.

2.4.5. The Operational Framework of the Tourism Sector in Cities

Since the characteristics of the tourism sector differ in different urban settings mainly due to the unique combinations of exclusive tourist products and services each city embraces, the operational management of the sector shows a variety of settings. The organisation of a city destination also differs from the organisation of industrial cities (Fainstein and Gladstone, 1999). Implementing tourism policies, financing tourism developments, providing visitor information services and marketing city destinations are pursued by various stakeholders of the sector often with a duplication of efforts. In many cases, city destinations have a leading tourism organisation in charge of the sector as a whole. While this organisation is usually established as a public authority responsible to either regional or national governments, there are examples of semi-public and private tourist and visitors bureaux.

Whether public, semi-public or private, the major aim of the leading tourism authority in a city should be to strengthen the collaboration among all the interested bodies of the sector on the micro-level and to keep the relations between tourism and other economic, social and cultural functions of the urban system up to date on the macro-level. In fact, today's globalised economic strategies take this argument one step forward and suggest that local authorities should adapt their tourism sector according to the economic, social, technical and cultural trends changing rapidly both in national and international arenas. Thus, strong relationships also need to be created between cities, governments and international organisations in order to retain a good share in the world tourism market. Besides, in addition to the tourism organisations of the accommodation, tourist attractions, catering and transportation industries, regional administrative bodies of government like departments of culture, trade, environment, education and town planning should take active roles in tourism management.

Given the need for co-operation for sustainable development, the complex structure of the operational setting of the sector in cities should be emphasised. Tourism concerns all sorts of organisations, communities and even individuals in city destinations. As Hinch (1996) pinpoints, destinations need to make visitors feel welcome. Providing services and products, which meet the expectations and needs of visitors may not be enough. Individual contact between visitors and service providers and between visitors and local residents may, too, have impacts on visitor experiences. Community opposition or resentment toward tourism would surely reflect on the dissatisfaction of visitors, hence harming the sector. If such opposition derives from erroneous beliefs and opinions about tourism, educating individuals on the benefits of tourism would be essential. On the other hand, if the main source of an opposition is the negative balance of the tourism costs/benefits ratio, the local authorities need to take radical decisions and to scrutinise their tourism plans.

2.4.5.1. Tourism and Other Economic Sectors in Cities

Until the recognition of tourism as a regeneration tool in the developed countries in the 1980s (Law, 2002), the tourism sector was considered as a branch of the economy, which should avoid urban areas and industrial agglomerations. This approach, which was mainly approved by the entrepreneurs of the traditional industries and even by some researchers working in the field of geography, has changed following the successful examples of regeneration programmes based on tourism. Such programmes have proved once more the economic benefits of tourism to cities. In fact, in comparison to other economic sectors which are highly resource-based and have to be located near to supply sources, the tourism sector has the freedom of being developed in various sizes of community establishments placed on a large geographical scale. Moreover, if the resources are taken into account, urban areas become the initial choice for tourism developments, as they comprise almost all of the pre-requisites for the development process of the sector.

2.4.5.2. Tourism Management Systems in City Destinations

The leading tourism organisation or authority in urban areas can be established in various forms. While tourist boards and bureaux are mainly found as public sector organisations responsible to local, regional and national authorities of government, semi-public and private tourism organisations also exist in some cities mainly in the USA. The difference between the organisational structures of tourism organisations results in the variety of aims and goals set for the effective functioning of the sector in a city. As Page and Hall (2003) note, while the main aim of private organisations is to develop and manage tourism to improve the well-being of urban economies financially, public authorities may be involved in tourism for several reasons ranging from environmental to political, from economic to socio-cultural reasons.

Many empirical research held in various cities show that partnerships improve to achieve mutual organisational goals in tourism destinations by pooling resources of the concerned shareholders. Some benefits of partnerships can be listed as (Selin and Beason, 1991; Geerts, 2000):

- To provide rational planning concepts, changes and modifications based on consensus established by all the partners involved;
- To facilitate the communication network in the sector which ease exchanging ideas and suggestions and encourage mutual learning process among partners;
- To enhance the lobbying strength of the sector especially when competing for grants, aids and sponsorships provided by national and international funding schemes and;
- To acquire economies of scale with pooled sources of various partners and to induce cost-effective solutions to planning strategies.

Despite their necessity in destination planning and all the above mentioned benefits, empirical studies in the existing literature also denote that establishing partnerships is not that easy. Competition for scarce resources amongst organisations supplying products and services to the same market; fragmentation of responsibilities and the difficulty of gathering various organisations under the lead of a single authority; lack of awareness of what partnerships can do both for destinations in general and for individual organisations in particular in the long-term; confusion caused by the overlaps in the aims and objectives of similar partnership establishments and; the conflicts in the goals and aims of the organisations operating in different sub-industries of the sector are some of the reasons why organisations hesitate to be involved in partnerships.

Unfortunately, misconceptions about partnerships are the main reason why organisations are more prone to act independently rather than being part of an effective communication network. The benefits of establishing partnerships outweigh the disadvantages. Therefore, the shareholders of the sector should be encouraged and even be trained to recognise the mutual benefits of co-operation both for the concerned destination and for the individual member organisations (Geerts, 2000). In the tourism sector, the interdependency among tourist products and services is of utmost importance, since the existence of any given product in the market depends on the effort of suppliers to place the product in a package with other tourist products and services. Hence, this very nature of the tourism sector makes co-operation among shareholders even more desirable.

2.4.6. Supply Side of City Tourism

City tourist destinations embrace many services and products within their product package. While some of the primary and secondary elements of a tourist product, such as major attractions with a strong pull-in effect on visitors and the provision of hotels, restaurants, and alternative transport models, are inevitable for destination development, increasing and on-going competition between tourist destinations in the marketplace forces city authorities and marketers to improve their products in order to expand the target group and to attract new potential market segments.

In fact, cities, by their very nature, are the agglomerations of products and services, which attract visitors. What made cities important networks of human and trade interactions in the first place, continues to draw the attention of potential visitors whether or not these ingredients are presented and combined intentionally in a *'product package'* by local authorities. In this section, some of the most common attractions found in major city destinations are listed. The detailed analysis of each attraction group is provided in Chapters 6 and 7, where the supply sides of the case study cities are assessed.

A) Accommodation and Catering: Accommodation and catering are the main components of product packages of all tourist destinations and usually receive the highest proportion of visitor spending compared to other tourist attractions, services and products (Page, 1995). The tourist product offer of most city destinations consists of various hotels, pensions, guest houses, restaurants, diners and cafes, which are often located within the central tourist zones of urban areas. The recent trend to extend the accommodation capacity of major city destinations by supporting new hotel developments near airports, gateway train stations and evolving business districts, is among the efforts of local authorities to mitigate the crowding problem in inner-city areas and to spread visitors across all the regions of urban destinations. Theme restaurants, meantime, have become appealing components of tourist product packages enriching the restaurant supply of city destinations (Law, 2002).

B) Transport: The importance of transport is twofold. First, a hub-destination characteristic needs to be established by developing or improving stations on the major transport networks in order to increase the accessibility of an urban area to regional, national or international tourist markets. Second, different public transport modes need to be developed to accelerate visitor flows within the city. While the provision of different transport alternatives both to and within a city destination encourages visitors to travel to urban areas, the concentration of visitors in inner city areas is enhanced by the fact that the major transport stops are found in the core of cities. Hence, regulating the transport network within a destination and maximising the efficiency of movement becomes a challenge for local planners.

C) Heritage sites, historical buildings and museums: There is no doubt that heritage sites, historic buildings and museums play a major role as the core elements of city product clusters and are, in many cases, the landmarks and the main reasons for travelling to urban areas for many visitors, hence their dominance in destination images. Their unique characteristics enable city destinations to differentiate their tourism product packages from their competitors (Hall, 1997a). With regard to heritage tourism, two issues are often raised by researchers: the conservation of urban environments and; the maintenance of historic buildings and sites in their original forms and settings. Museums, meanwhile, have evolved from being education centres to interactive attractions combining education with entertainment over the last century, which, as a result, made them more market-oriented as opposed to product-oriented (Beeho and Prentice, 1996).

D) Cultural Tourism, Arts Events, Festivals and Special Events: An involvement in culture and arts events denotes partly how vibrant the city is. Encouraging visitors and residents to take part in such events helps city destinations to improve the perceptions of the standards of living quality in their urban environment. While cultural activities enable locals to socialise with each other, they provide opportunities for visitors to understand traditions and cultural customs of local communities. Culture and arts events can surely be the main pull-in attractions for certain visitor markets who travel especially to destinations to participate in such events (Getz, 1998; Richards and Wilson, 2004). Cultural attractions can also ameliorate visitors' experience whether or not their main motive of visit is such attractions. That is why cities prepare special promotion campaigns with the theme *'a cultural destination'*, while local, national and international businesses seek to benefit by sponsoring culture and arts events organised in order to intensify this *'cultural destination'* image as well as to enhance civic pride (Laws, 1995). Special events, meantime, are short-term organised events whose theme can be anything ranging from sports -*i.e. Olympic Games*-, to trade and business -*i.e. Expo Fair*-. While special events may be used as a revitalisation tool in urban areas, the upgrading of existing infrastructure facilities and the construction of new complexes may be needed to host such an event, which may: enhance the image of the *'host'* destination via extensive media coverage; boosts civic pride; help tourism to be the *'catalyst'* in deteriorated urban areas; enable destinations to attract visitors in off-peak seasons and; may become an instrument for environmental and sustainable development in urban planning (Roche, 1994; Broadway, 1997; Rubalcaba-Bermejo and Cuadrado-Roura, 1995; Hall, 1997b; Hughes, 1999). While planning, implementation and monitoring are required in the process of event-production, the failure of an event may have a long-lasting negative impact on the destination image (Dimanche, 1997).

E) Shopping and Market Places: Many cities have recently been placing their shopping streets, malls and famous stores in their promotional campaigns as image constituents. This is mainly because of the fact that the shopping expenditure of visitors may reach vast amounts, creating profitable incomes for local economies. However, for cities to earn propitious incomes from visitors spending on shopping, the tourist product clusters of city destinations need to be equipped with more than a few souvenir shops and department stores (Miller et al., 1998). In order to improve the urban environment to promote it as a shopping destination, developing new shopping centres and malls, refurbishing traditional shops and renovating shopping streets with signposts, street decorations and wide pavements would be needed to create an enjoyable atmosphere for shoppers (Jansen-Verbeke, 1994). Market places, on the other hand, combine shopping with entertainment. Baltimore's Harborplace and London's Covent Garden are examples of market places in the very centre of urban areas.

F) Sport Tourism in Urban Areas: Organising sports events in urban areas attract both participants and spectators. Hosting international championships and tournaments helps a city to gain the advantage of reaching new market segments; to reinforce its image as a prestigious location and; even to obtain grants to improve the infrastructure of its urban environment, as well as to upgrade its sports complexes and to build new ones. Hence, it is not surprising that the competition among cities to host sports events like the Olympic Games and the European Football Cup has become fierce. London, for example, is famous for hosting many annual sports events including the Wimbledon Tennis Tournament, London Marathon and the Oxford-Cambridge Boat Race, in addition to the periodic matches of its local football, rugby and cricket teams. Even if the sports activities offered by an individual city are not on a professional level, but for the use of recreational visitors and residents, the social and educational benefits gained by such activities cannot be overlooked. By specialising in certain types of sports and organising events and competitions in the less busy months of the year, cities can also spread their visitor arrivals equally between different seasons and across its urban boundaries (Broadway, 1997).

G) Theme parks, recreational parks, zoos and aquariums: In contrast to the common belief that environment-based visitor experiences are only rural, urban areas can embrace recreational parks, zóos, aquariums and ecology parks in their product clusters as well (Townsend, 1992; Law, 2002).

H) Business tourism, conference and exhibitions: The more international organisations a city hosts, the more the local economy benefits from business trips, conferences and exhibitions. Since an average business visitor tends to spend more within a relatively short time than a tourist on a recreational holiday, tourism planners and marketers put emphasis on business districts in their marketing activities, and try to strengthen the image of a city as an international centre for business and communication transaction. As a result, the competition to host international and national conferences and exhibitions has become fierce among city destinations. In order to attract such organisations, the product offers of urban areas are enriched by purpose-built conference venues including halls, arenas and congress centres. While such venues can be newly built as modern complexes with the provision of special lighting, sound systems, catering and translation facilities, derelict factories, warehouses and buildings can also be transformed into exhibition halls and congress centres. Law (2002) notes that an urban area becomes an attractive conference and exhibition destination only if: it has an attractive physical environment; it has a diverse range of tourist products and attractions in its product offer; it has sufficient accommodation establishments at both the luxury and budget ends of the market and; it has good accessibility particularly through an airport.

I) Visits to work places and factories: In many cases, the derelict sites and buildings left by the manufacturing industries are transformed into new tourist attractions like theme museums, indoor recreation centres, conference centres and shopping malls according to the revitalisation programmes. However, maintaining production sites in their original setting and transforming them into new tourism forms with *'work place'* and *'factory tours'* are also possible. Visiting a windmill, a coalmine or more modern establishments like a beer factory or broadcasting organisations has become popular amongst tourists. Since such attractions are not developed solely for tourism, the financial sources needed for development would be less than transforming these sites into new tourist attractions with new themes. Their informative content would especially attract school groups, families and visitors who have a special interest in such industrial sites. The Thames Barrier tours in London and the tours to NBC television studios and the stock-exchange market in New York are good examples of such tourism in urban areas.

Other tourism forms like gambling in urban areas, garden and horticulture festivals and religious tourism are also of importance to some city destinations, which have sufficient infra- and supra-structure amenities and facilities.

2.4.6.1. Product Clusters and Tourism Zones in City Destinations

In contrast with other geographical regions, cities have the advantage of combining more types of tourism attractions on a fairly small scale where accessibility is eased for visitors with the introduction of different alternative modes of transportation. In fact, not all tourist destinations on different geographical scales can bring as many tourist facilities and attractions to the same location as many major cities do. As Ashworth and Tunbridge (2000) describe, of the facilities and attractions available in any city tourist destination, different visitors who may be regarded as *'manufacturers of the product purchased'*, have the option of combining several different products according to their own needs, wants and choices. Today, historical and other man-made places, culture and arts events, sports events, exhibitions and conferences, shopping facilities, travelling for educational purposes and special events are offered to visitors within the same package as the supply-side components of the tourism sector in metropolitan areas, while some of the secondary elements of the sector such as hotels and restaurants, can be found in large numbers and in different categories, meeting the expectations of different market segments.

'Product clusters' of city destinations, as noted by O'Leary and Dottavio (1980), aggregate attractions, facilities and services in such a way that a visitor who participates in any one of the activities within a given cluster, would also attempt to participate in other activities provided within the same cluster. Middleton (1998) refers to the same concept as *'the overall tourism product'* consisting of five main components: attractions; supplementary tourism facilities; accessibility; image, and; price. While attractions are the elements of a destination serving as the primary motivation for pleasure of visitors, destination facilities are the elements within the destination, making it possible for travellers to stay at a destination and to participate in the attractions. They include accommodation, restaurants, transport and other services including leisure and recreation activities. Accessibility is regarded as the degree of comfort to get the destination that is desired by travellers, in terms of time taken, cost and the relative ease or difficulty. Finally, the author refers image and price as the most influential factors for potential travellers in the decision-making process of choosing a particular destination. Price is the total of costs for the travel including accommodation, transportation and activities at a destination, while "destination image" is further explained in the next chapter.

To conceptualise the supply-side elements of urban tourism from the perspective of an overall offer, Jansen-Verbeke (1994) splits the constituents of an urban product cluster into three groups:

- ***Core elements*** include the tourist products and services, which serve as the main purpose of travel and are unique to destinations. For instance, the core elements of London's product cluster would include The Tower of London, the Buckingham Palace and Big Ben.
- ***Secondary elements*** are supportive products and services provided. Secondary elements are not the main motives of travelling, but can encourage visitors to stay longer or to repeat their visits to a particular destination. These elements include hotel and catering facilities, shopping facilities and markets.
- ***Additional elements*** include all other urban and tourist services and products from which visitors may or may not benefit during their visit. Provision of information and different transportation modes within the destination can be listed among the additional elements of product clusters.

Although, such a classification of the elements of the tourism system makes it easier to understand the supply side of city destinations from the scientific perspective, it is clear that there may be some overlap between the different element groups in individual urban areas. What may be a so-called core element in a given destination, may be a secondary in another. However, some authors identified key elements contributing to the attractiveness of an urban destination. According to Laws (1995), for instance, the factors enhancing visitor flows between an origin and a destination include: accessibility; affordability; ethnic and historic links; scenery, culture and climate; familiarity or exoticness, and; marketing efforts.

Nevertheless, as argued by Jansen-Verbeke (1994), Middleton (1998) and O'Leary and Dottavio (1980), it is the product packages which city destinations combine, design and market that differ urban areas from each other according to the unique aspects offered. It may be argued that product packages can help local authorities, planners, marketers and researchers to distinguish the expectations of different demand segments and to understand the supply capacity of a given destination. Thus, drawing a map of nearby attractions offering services and products to meet similar needs and wants of visitors, can shed light onto the visitor flows within a city.

While product clusters can be found in almost all tourist destinations regardless of their geographical characteristics, city destinations stand out from others in the way that a visitor has the chance to combine different activities from a wide selection of product offers and to create his own product cluster. This is why, in city destinations, individual visitor experiences differ according to the product packages.

For example, a visitor travelling to a city with the main purpose of seeing heritage sites and historical places, would combine cathedrals, castles and museums within his own product cluster, while a visitor whose main interest is shopping, would create a cluster of famous stores, speciality shops, department stores, markets, shopping malls and streets. Obviously, the common ingredients of both of these visitor clusters may be: where they stay; the transportation modes they use to reach the attractions and; some other tourist and urban facilities and services they may use during their stay. There may also be overlaps among the major attractions they visit. While the visitor whose main purpose of travel to the city is shopping, may also like to see the landmark heritage sites, in the same way a heritage visitor may be interested in souvenir shops and major shopping malls.

Once the tourist zones of a given city destination are mapped according to the nearby tourist attractions and services that enhance tourist penetration in certain districts, visitor types of a certain product cluster can then be directed to other attractions which target the same markets as the products and services combined by visitors in that particular cluster. As a result, the area of the cluster in which the individual tourist attractions and organisations are located, can be enlarged to reach the outer city zones and even the hinterlands. Gudelis (1986) lists the determinant factors when mapping tourist zones of a city destination as follows:

1. The area where the landmarks and major (primary) attractions of the city are located;
2. Areas where basic tourist facilities (hotels, catering, information bureaux) and other important services are located;
3. Recreational areas situated near the areas mentioned above (1 and 2);
4. Transport connections (for both pedestrians and transport modes) between attractions, tourist services and major stations and airports.

Since all of the above factors can be found in the very centre of many major city destinations, tourist zones tend to be central and bounded by the historic buildings detaching the old city from the contemporary architecture. Hence, many major city destinations still experience condensed visitor flows in the city cores, whereas the attractions and tourist organisations in the outer regions suffer from a lack of visitor attention.

In addition, travelling either by public transportation modes or coaches confines visitors to the areas of their interest. Consequently, a crowd of visitors can create planning problems in tourist zones and districts, which may be a small fraction of a city. In the same way, new tourist developments located in such central tourist zones in order to benefit from the already overflowing visitor moves, do not help planners and outer districts to spread the benefits of the sector equally across the city. However, the recent trend to develop business districts and tourist accommodation zones outside city centres and nearby major transportation hubs like airports and harbours, is an attempt to mitigate the central visitor flows in urban areas and their negative effects on urban environment.

As Law (2002) suggests, unless the concentration of tourist attractions in central districts causes planning bottlenecks for the utilisation of an urban system, clustering supply components in certain zones facilitates the functioning of tourism sector, as product clusters ease the movement of visitors and encourage them to explore the destination by walking. Attractions located within each other's close vicinity make visitors feel comfortable and safe in contrast to attractions scattered across a complex and sheer-sized urban settlement which may be a discouraging factor to visit a particular destination. Hence, when decisions are taken to spread visitors equally between the different areas of a city destination, the development of new tourist zones where several attractions and tourist facilities are agglomerated within a product cluster in the outer fringes should be considered instead of new tourism attractions developed individually without the support of other nearby tourism attractions and amenities.

2.4.6.2. Uniqueness or Homogeneity: The Success of Urban Attractions

As noted earlier, the diverse nature of city tourist products makes it more difficult to study their characteristics and to evaluate city destinations under classified groups. One might suggest that city tourist destinations can only be analysed individually especially when preparing marketing plans, because they become unique product clusters by gathering different attractions and facilities, which is hardly compatible with the offers of other tourist regions. Therefore, while the lessons learnt through the experiences of other cities may provide guidelines, a preparation of marketing strategic plans for any city destination should be based on the individual characteristics of its tourist product. This is one of the most important issues upon which tourism development agencies and marketers should focus when designing and improving their offer.

In contrast, in real-life applications, a few cities can be seen offering similar tourist products such as themed restaurants now widely spread around in Europe and in the States. In fact, in the more than ever globalised economies of today, many downtown areas, high-streets, waterfront developments, parks, theatres and cinemas, shopping malls, conference and exhibition centres and even some themed museums are becoming more and more alike. Additionally, the modern architectural structure of the business cores of inner cities with high-rise buildings are not unique to any destination, but can be found in many different urban settlements. Hannigan (1998) argues that the standardised activities and services of international restaurant and hotel chains enable visitors to feel more comfortable in an unknown and unpredictable urban setting. However, cities that direct their tourism plans and efforts towards emphasis on similar strengths of destinations along with the creation of homogenised urban environments are overlooking the reasons why visitors, residents and even businesses prefer certain destinations to others.

There is no doubt that city destinations product offers should meet at least the basic expectations of potential visitors, if product clusters are to be developed and strengthened sufficiently. Provision of diverse accommodation and restaurant facilities and transport services, for example, is vital when marketing and developing an urban area as a tourist destination. It is also a fact that some of these services and facilities should be comparable with the offers of other destinations. For example, hotel operations should target both ends of the market, including some of the biggest international hotel chains as well as B&B and guesthouses. However, with particular reference to the primary elements of the supply side of any city, the authorities should ask themselves, to what extent these attractions, services and facilities should be a repetition of other cities' experiences. Undoubtedly, throughout the creation process of a positive image for a given tourism destination, the perceptions, opinions and beliefs of the unique attractions and sites, which the destination embraces within its product package, play a major role for long-term success of the destination.

As Gunn (1994) indicates, every destination, whether rural or urban, has a different set of geographical factors and location, traditions, relationship to markets, and host characteristics. Natural and cultural resources are not evenly distributed. Even cities within a few miles radius with similar physical and architectural characteristics can provide something unique to themselves and can be turned into different experience modules for visitors. One should not forget that one of the main reasons for travelling is to see and experience something different. If urban areas continue to replicate the attraction developments of each other, they might ease their marketing and tourism development plans and activities, but they would also take the risk of losing or not getting any market share for their homogenous product and of deteriorating the image of their city and region (Broadway, 1997).

2.4.7. Demand Side of City Tourism

The exclusive variety of attractions, products and services provided in city destinations draw all types of visitors, which makes it more difficult to study the demand side of the sector in urban areas. However, understanding the demand characteristics of a city destination is crucial when preparing development and marketing plans. As the city and its tourism sector evolve, demand patterns are affected by fashion and new consumer trends in the travel business such as the emerging special visitor types, increases in time and expenditure in conjunction with improvement of visitor well-being and changing preferences with regard to use of accommodation and transport modes. Moreover, the unpredictable and fashion prone characteristics of demand become even more complicated with the changes in the ways to explore a particular destination that occur even during the visiting experience based on the provision of sufficient information to visitors by tourist organisations.

Hence, while one may classify urban tourist types according to the main purpose of visit, it is also possible to argue that the complex structure of city tourist products do not allow segregated market segments to be listed under a few headings. In addition to the common visitor categories such as *'international visitors'*, *'domestic visitors'*, *'day trippers'* and *'conference visitors'*, cities have the advantage of broadening their visitor profile with other types of visitors like *'short-break holiday visitors'*, *'visitors on educational trips'*, *'heritage visitors'*, *'business visitors'*, *'shopping visitors'* and even *'residents'*. Surely, all these market segments are not unique to urban areas, but can be found in all types of tourist destinations. What makes urban areas different from the others is that they can draw all these market segments to a single product package at the same time. That is why the product clusters of urban areas can be marketed simultaneously to varied market segments in different markets (Ashworth and Voogd, 1994; Page, 2002).

Due to difficulties in describing an overall *'urban visitor'*, the general approaches to visitors' behaviour, expectations, needs and perceptions about a particular city cannot be summarised by a general demand characteristics model. However, previous research pinpoints the following general factors with regard to the demand side of city tourist destinations (Burtenshaw et al., 1981; Law, 1996a and 2002; Haywood, 1992; Hinch, 1996; Wober, 1997b; Page, 2002):

- In comparison to traditional sea-sun-sand destinations, city destinations do not experience fluctuations in visitor arrivals, which is known as *'the seasonality of tourism functions'*. Instead, they attract visitors throughout the year with fairly trivial changes between different seasons. Although they are less dependent on summer and good weather, it is a fact that visitor arrivals in many major city destinations reach a peak in summer months. December and January are the other two months, when cities have high numbers of visitor arrivals due to the Christmas holiday and New Year celebrations. However, short-break holidays taken in spring and autumn have become popular and, to a certain extent, balance the fluctuation of visitor flows between different seasons to city destinations.
- Although, in contrast to the long-stay holidays in traditional tourist resorts, visitors to urban areas tend to stay shorter with an average of two to three nights, they spend more than an average visitor in a resort. This is partly because of the fact that cities are more expensive than rural areas, and the high costs of operation force service providers to charge more. As a

result, the majority of visitors tend to be from high socio-economic classes, while people on low incomes may find it difficult to travel to urban areas and to gain access to certain urban attractions.

- Although the market segments attracted by city destinations show disparities as a result of the dissimilar product clusters on offer, Wober (1997b) notes that the more popular a city destination becomes, the larger share of foreign visitors it gets. However, domestic visitors tend to dominate the overall visitor profile of city destinations and continue to increase in line with the increased popularity of the destination.
- Research done in 35 European cities suggests that, with regard to purpose of visit, business travellers represent the highest share among market segments drawn by city destinations (Wober, 1997b). According to the research, business travellers provide an average of 46% of overall visitor numbers in urban areas, while the other two major tourist market segments *-i.e. leisure market and visiting friends and family market-*, account for 27% and 8% respectively. Hence, cities are characterised by high populations and they attract relatively higher numbers of visiting friend and relative tourists than rural areas.
- Day-trippers, meantime, represent a higher market share in city destinations than business travellers. However due to the difficulty of counting day-trippers and to the differences between over-night visitors and excursionists, this type of visitors need to be investigated separately from other leisure and business tourist market segments.

2.4.7.1. Attracting Visitors, Residents and Businesses to Cities

Fierce competition among urban areas is not only tourism-based. The globalisation process accelerated technological developments providing better opportunities for trade and communication transactions, forcing authorities to place their cities on the international map and to attract businesses and residents. While new business districts are located outside central areas, new zones are parcelled out for new residential housing construction in addition to strengthening the image of an urban environment with the provision of more leisure opportunities, including additional recreational parks, shopping areas, sports complexes, theatres and cinemas.

In fact, the supply components required to develop or improve the tourism sector in a given destination often serve and are used by residents as well as visitors. As citizens who travel within their own country are considered as domestic tourists, residents of a city who take part in leisure and recreational activities in the city must be counted as the users of urban tourism attractions as well. Van der Borg (1991) defines this as *'urban recreation'*, which includes all the recreation and tourism activities experienced by the residents living in a given urban area permanently. In terms of particular attractions, such as sport complexes, discos, cinemas and theatres, commercial operators might be reluctant to invest in a city, if locals do not represent the majority of potential customers.

The other important factor with regard to the relationship between residents and the tourism sector is the need to foster the attachment and sympathy of residents towards the sector. Hospitality shown to visitors by residents and the sector employees is of special importance in enriching the visitor's experience in a given destination (Fainstein and Gladstone, 1999). As Keogh (1990) emphasises, in order to overcome the dilemmas caused by resident opposition toward tourism, public participation in the tourism planning should be encouraged by local authorities and community-oriented approaches should be balanced with market-oriented approaches in the planning process. In fact, if a strong community opposition toward tourism occurs due to the large numbers of visitors causing crowds, noise, pollution and crime in central tourist districts, the behaviour of residents toward visitors can become so unpleasant that visitors may be discouraged to visit the city.

Besides, although tourism can be a *'catalyst'* in the transformation process from industrialisation to de-industrialisation, revitalisation programmes cannot solely rely on tourism and its economic, social and cultural benefits. Well-established sustainable tourism development can only achieve consistent interests and profits, when the sector is embroidered into the overall economic structure of urban complexes. In the same way, making a city attractive to investors cannot solely rely on the basic economic requirements such as the provision of communication networks, allocated sites and zones for business development. Improving the overall atmosphere of urban mechanisms by offering better housing and lifestyle opportunities enriched by recreational amenities surely influences the preferences of decision-makers on particular sites to locate their businesses (Law, 2002). That is why leading city destinations establish local business partnerships to market their cities in the international arena to investors and to enhance their image as trade centres.

From the tourism perspective, meantime, local authorities prefer to market city destinations as a whole, and emphasise the major pull-in attractions in their promotional campaigns. This is because, many visits to cities are multipurpose and product packages are combined by visitors individually. Consequently, it is rather difficult to clarify the main motivation factor of travelling to city destinations. For example, a visitor on a business trip in London, may also like to visit the famous heritage sites such as the Tower of London or Westminster Abbey, as well as s/he may choose to see one of the world-wide famous West End shows. Then, a so-called *'business visitor'* becomes also a *'heritage tourist'* and a *'culture tourist'*.

This complex structure of urban tourist types becomes further intricate, when each tourist type splits into sub-categories. For instance, Van der Borg (1992) divides excursionists into four groups: the traditional excursionist (day-tripper); the indirect excursionist; the passing excursionist and; the false excursionist. The author argues that, in addition to the trippers who visit a city for leisure purposes in a day *–i.e. day-tripper-*, there are indirect excursionists who spend their holiday in one destination and take part in one-day excursions to others. Passing excursionists, on the other hand, are the visitors who move from city to city spending a day in each of them. Finally, the false excursionists are those who stay in a particular destination, and travel to another one to visit tourist sites every day during their stay. Van der Borg explains this peculiar choice of the false excursionists by the high costs of the destination visited every day, which restricts those visitors, whose holiday budget is limited and who cannot afford to stay in the destination visited. The tourism literature contains many other studies, which examine the terminology of the tourism sector components and suggest new tourism forms and different tourist types (Dietvorst, 1993a; Haywood, 1992). Bearing in mind the difficulty of classifying urban tourist types, the main market segments, which the major city destinations target in practice, includes: visits to friends and relatives market; sports tourism market; heritage tourism market; short-break holidays market; culture tourism market; special event market; visits with the purpose of education market; day visitors market; business tourism market and; shopping tourism market.

2.4.7.2. Product Buying Process for City Destinations

Visitors are *'the manufacturers of product packages'* in city destinations. By choosing various products and services offered both before their trip and during their visit, they create individual product packages according to their needs, wants and expectations. If the extensive range of tourist products and services existing in city destinations is taken into account, the difficulty of drawing a general buying process to be applied to each type of visitor becomes clear. Not only the extensive range of products make it difficult to generalise a buying process, but also the varied market segments including shoppers, day trippers and business travellers, attracted to city destinations cause dilemmas in understanding how each type of visitor behaviour, attitude and expectation differ from others.

In her study, Jansen-Verbeke (1997) notes that despite the common characteristics of each market segment, the real motives influencing the decision making process and the behaviour patterns of individual visitors still remain a *'hidden agenda'*. The social, educational and financial background of visitors, and the information sources for each type of visitor provide some hints for tourism organisations and local authorities on how each group would choose to buy tourist products and services, and spend their time during their visit to urban areas. But obtaining information about each group and influencing their buying behaviour in line with the sustainable development plans of city destinations, remains a complex formula to be solved in many urban areas.

In the literature, there are very few studies on urban visitors behaviour and visitor motivation in city destinations (Shaw and Williams, 1994). Those, which look into the demand characteristics of city destinations mainly try to apply the traditional tourist buying processes to urban areas. For instance, De Haan et al. (1990) relate allocentric and psychocentric visitor types of Plog (1973) to city destinations. According to the authors, while allocentric visitors solely create their own product packages and are more adventurous with their experiences, psychocentric visitors tend to be more fashion followers. The authors also add that such approaches may be misleading, as they overlook the supply side effects of urban product packages, which have some influence on the way that city destinations are consumed. Williams (1998) also criticises the model for over-simplifying the alteration of visitor behavioural patterns in different destination types and between different tourism forms.

In addition to the allocentric/psychocentric visitor approach, life cycle analysis and the visitor types attracted in each stage of the life cycle of city destinations are used to understand the behaviour of urban visitors. Such an approach suggests that, at the early stages of the development of a city destination, visitors are in small numbers, but are mainly educated high-spenders. Towards the later stages, the destination gradually becomes a resort for mass tourism combining varied market segments (Law, 2002).

2.4.7.3. Carrying Capacities of City Destinations

Despite its numerous benefits, tourism can cause problems, if ill-managed. One of the major drawbacks of tourism occurs when the increase in tourist numbers exceeds the limits of the capacity of tourist service and facilities in a given destination. When the destination fails to accommodate more visitors without diminishing the acceptable or maintained standards of its service quality, it is believed that the destination has surpassed the thresholds of its carrying capacity. This is, of course, only true if overflows continue in a long-run rather than short-term and temporary increases in visitor numbers emerging are due to extraordinary occasions including one-off special events or international meetings. However, even in the case of volunteering to host such events, organisers and local authorities should consider both the capacity increases required to accommodate potential visitors and the probable long-term benefits of the event for the destination.

Growth in visitor numbers does not necessarily mean that a destination will experience tourist crowds and will be harmed by the negative effects of the crowd. Sustainable growth could help destinations to benefit from their tourism sector and that is what decision makers usually aim at in their strategic tourism development plans. But the downside of growth becomes discernible when it reaches a level beyond the control of planners and local authorities. Tourism, then, can harm the local environment, the maintenance of tourist attractions and services, the social and cultural life of locals and even the quality of visitor experience in the destination. In the tourism literature, Venice has been shown as a typical example, which has been struggling to cope with above the acceptable carrying capacity levels (Van der Borg and Costa, 1993 and Van der Borg, 1992).

In fact, city destinations which already embrace sheer and diverse demographic groups in their complex structure should be especially careful when managing and measuring their tourist carrying capacity levels. It is a fact that urban areas are able to locate more attractions and services in their spacious settlements than rural destinations. But this very urban characteristic that different attractions and services can be harmonised in one product package spread across a single destination also means that the visitor markets attracted, can be equally diverse, large in numbers and difficult to control. When residents and workers travelling into city centres from suburbs, are added to the already assorted visitor profile of city destinations, overcoming possible carrying capacity problems becomes more difficult, but also imperative.

Therefore, when planning and developing the tourism sector in a city, decision makers who have sufficient knowledge of the attractiveness of the destination, should be able to extrapolate both the incoming and outgoing tourist flows to/from the city. Once the capacity limits of the existing attractions and any other type of tourist and urban services are formulated, the decision makers should be able to decide how many visitors can be absorbed without causing any interference in the maintenance of the urban system. When the formula is being prepared, certain factors like accessibility of the destination, availability, convenience and user-friendliness of tourist products/services and the management of the sector are used as primary determinants for the constancy of the visitor numbers. Nevertheless, deciding on the maximum number of visitors within the acceptable limits of the carrying capacity would not be enough. Cities attract all sorts of visitor types. Their needs, wants, behaviour, expectations and preferences to explore the city may be so intricate and diverse that each type of visitor groups may require individual analysis.

The reasons of concentration in city destinations and carrying capacity itself can be split into several headings and each of them may complicate the analysis of visitor flows to city destinations. To start with, in many cities, the concentration of visitors occurs in central or the *'old city'* districts due to the agglomeration of major attractions and tourist services in there. As a result, even if the total number of visitors in a city is not inordinate, concentration in these districts may present planning problems and may require the utilisation of visitor management techniques. By providing reliable information to visitors either before or during their visit, they can be discouraged from visiting some attractions, and their flow can be kept along particular tourist corridors.

Second, carrying capacity limits may be forced to the edge at certain periods of time. It is a fact that visitor arrivals to city destinations tend to be more consistent and spread fairly equally through a year compared to rural and traditional sea-sun-sand destinations. But they can, too, experience fluctuations and be threatened by an excess demand at certain periods of the year. There are several factors influencing potential visitors to decide where and when to take holidays, but information provided by local and national tourist offices can, again, help to convince visitors to choose off-season periods for their holidays to city destinations (Butler, 2001).

With regard to the types of carrying capacity, three main concepts are usually used in the tourism literature (Van der Borg and Costa, 1993):

- Physical carrying capacity- the limit beyond which the local environment and the local cultural resources are damaged;
- Economic carrying capacity- the limit beyond which the quality of the visitor experience falls dramatically;
- Social carrying capacity- the number of visitors a city can absorb without hindrance of the other social and economic urban functions it performs.

Van der Borg and Costa (1993) argue that when estimations are made by decision- makers to decide on the maximum numbers of visitors accepted, these three concepts should be taken into account simultaneously. However, while measuring the physical carrying capacity of the destination is possible with certain tangible indicators to show the physical influence of tourism on urban environment, the decrease in service quality and visitor experience cannot be estimated so easily. In fact, visitors to cities accept the fact that there will be some crowding and some prefer cities for that reason. Some visitors, who live in a metropolitan city and travel to another one, may not even perceive the concentrated visitor flows in certain places as crowding that limits their experience.

Although formulated from findings from research in rural destinations, the table below on carrying capacity judgements is presented in order to provide some insights into perceived crowding. As Table 2.4 denotes, when decision makers consider the social and economic carrying capacities of a destination in conjunction with physical carrying capacity, they should examine the demand characteristics of each market segment in detail to understand what the expectations, preferences, habits and the needs of these segments are. If the analysis indicates that a typical visitor type representing the target markets for the destination, would not find the city crowded, decision makers can avoid unnecessary regulations to limit visitor numbers.

However, the perceptions of local residents and how crowded they find the city is as important as the perceptions of visitors. As Burtenshaw et al. (1981) emphasise, if the number of visitors exceeds the number of residents at certain times and locations, residents start to compete for space and the use of facilities, which may result in residents disputing the actual benefits of tourism for them. The challenge for managers, then, becomes one of balancing the visitors/residents ratio without causing any resentment of residents, which would be reflected in the service to visitors.

Table 2.4. Carrying Capacity Judgements Based on Levels of Perceived Crowding

% of visitors feeling crowded	Capacity Judgement	Comments
0-35	Suppressed crowding	Crowding limited by management or situational factors; may offer unique low-density experiences.
35-50	Low Normal	Problem situation does not exist at this time; as with the above category, may offer unique low-density experiences.
50-65	High Normal	Should be studied if increased use is expected, allowing management to anticipate problems.
65-80	More than capacity	Studies and management necessary to preserve experiences.
80-100	Much more than capacity	Manage for high-density recreation or sacrifice area.

Source: Shelby et al. (1989), p.285.

The difficulty of estimating carrying capacity levels forces tourism researchers to formulate actions based on empirical evidence. Since it is very difficult to estimate the actual carrying capacity limits of individual city destinations that differ from each other extensively, the following actions suggested by Van Der Borg and Costa (1993) are only informative and theoretical. The authors argue that a city destination, which has a saturated supply/demand ratio, can:

1- take supply side measures to enlarge the capacity of supply or increase the degree of utilisation;
2- accept the congestion levels and '*compensate*' residents not living from tourism for the disadvantages suffered and;
3- take demand side measures such as diversifying the accessibility according to different visitor categories and '*rationing*' the use of the city through restrictive price or reservation policies.

2.5. Benefits and Drawback of Tourism in Cities

The empirical studies in the literature show that if managed, developed and marketed effectively, a city destination can benefit from the economic, social and physical improvements of tourism in the area. But, in the same way, short-sighted tourism management may lead to the undesirable effects of tourism on the urban environment, as it could do in any size tourist destination. In fact, the unique advantages and disadvantages of tourism to urban destinations are neither easy to distinguish nor describe. However, the way that tourism has been developed in metropolitan areas over the last few decades could be key to analysing them.

To start with, many of the competing urban destinations in developed countries have been focusing on the sector for its potential economic benefits. Earnings from visitor expenditures, taxes and multiplier effects of tourism incomes help decrease the budget deficits of local economies. That is why tourism has been seen as a catalyst to regenerate urban economies with new investment opportunities inducing new job offers for locals. New jobs mean that employees are empowered with educational and training programmes, hence an increase in the skilled labour force.

Although tourism has always been criticised as the sector for the unskilled, that is only partly true for some small businesses in urban areas. When the diversity and sheer size of the potential labour force in cities is considered, the provision of jobs for the unskilled can be considered as an advantage. But, especially in urban areas, highly skilled professionals, too, would be needed to be responsible for managing, developing and marketing the sector effectively (Ashworth and Tunbridge, 2000).

Second, tourism leads to the physical improvement of urban cores: derelict sites and buildings are transformed into new tourist attractions and the existing services and products are supported with funds, grants and awards by public and private organisations to be renovated and restored. While conservation and sustainable development have become the prerequisites of tourism development plans, parks and other recreation zones continue to survive for the use of both locals and visitors. Since the improvement of the physical environment reinforces the vitality of a city, it becomes an attractive place to work, visit and live. When combined with a well-created and well-marketed image, the vitality of the city can boost both civic pride and visitor numbers (Krantz and Schatzl, 1997).

Third, one of the most important benefits of tourism is that the need to place cities on *'urban tourism markets'* forces public and private organisations to collaborate in order to create better organisational structures to manage, develop and market the sector. Although the creation, improvement and marketing of image have become the essential ingredients of success, the leading tourist cities have proved that tourism can only be of benefit to urban areas when:

- The city destination is considered as a package product including all the constituents of the sector;
- The understanding of the reliance of tourism on other urban economic functions is established and;
- The co-operation between tourism and other urban economic sectors is enticed.

In fact, tourism would surely be fostered by the importance of a city as a communication, technology, education and financial centre. All these special characteristics of the city will result in the attraction of different market segments. While an analysis of each segment *-i.e. an average business visitor tends to spend more and a visitor on an education trip tends to stay longer-* and the characteristics of the product on offer help cities to specialise in certain markets, drawing different market segments can also enable a city to spread visitors through out the year and across the city.

The drawbacks of tourism in urban areas, on the other hand, evolve mainly due to the lack of sufficient strategic marketing and development plans applied by managing authorities and organisations. Jansen-Verbeke (1991) summarises the major dilemmas in urban tourism management as over-capacity visitor flows causing crowding, noise, pollution, inadequate safety precautions and community opposition towards tourism. While effective and co-operative urban management can overcome such problems, it should be noted that tourism cannot take the sole responsibility for the increase in urban problems. The very characteristics, which make urban establishments *'metropolitan areas'*, are also the main reasons for crowding, noise and pollution. Thus, by their very nature, urban areas consist of high volumes of diverse demographic groups and economic activities, which in turn require appropriate city management plans.

Urban economies tied strongly to the tourism sector, however, may face the negative economic impacts of tourism induced by unfavourable dependence on tourism and its economic sources. The withdrawal of visitors from such destinations occurring either due to unpredictable circumstances such as global economic recession, terrorism, environmental catastrophes or the lack of well-structured planning, management and marketing by local authorities, may weaken the urban economy (Hopper, 2002). While private tourism organisations lose their income-generating customers, the number of redundant tourism employees will increase and taxes gained from the tourism sector may need to be minimised by local authorities. Therefore, the need to entwine tourism with other economic industries within the overall economic structure of urban areas is of utmost importance for the success of the sector.

To conclude, in the words of Burtenshaw et al. (1981, p.178);

> *"it frequently appears that the benefits accrue principally to the nation as a whole, while the costs are incurred mainly by the individual city... Again it is evident in many of the individual studies that while the benefits are relatively easy to quantify in terms of visitor expenditure and increased local incomes and employment, the costs, on the other hand, are far more diffuse and expressed in terms such as 'social alienation', 'cultural degradation' and lost supply depends in alternative opportunities that are difficult to quantify".*

2.6. Conclusion: The Future of City Tourism

The issues of urban tourism that will probably be the main focus in the future are long-term marketing planning, partnerships, increased competition and uniqueness of both product packages and individual attractions.

If the interference of internal and external factors is disregarded, forecasting techniques may help individual cities to predict the development process of tourism sector on a time-scale provided that they have efficient statistical data required for such analyses. Nevertheless, it is probably more difficult to foresee how the market share of product packages that city destinations offer will change in the future in comparison to a tangible and single product whose target market can be specified more easily.

Besides the influence of unexpected factors on the outcomes of such analyses, the very nature of city destination product packages encumbers planners in providing accurate forecasting results, but does not make it impossible. Indeed, the future of any city destination is subject to continuous changes, resulting in new trends in the market and changes emerging in the supply and demand sides of its own product package.

When the future of *'city tourism'* as a research field is under the microscope, the use of forecasting techniques is not of much help. However, the quality and quantity of research dealing with the urban tourism issues has been improving since the 1990s, in spite of the recent attention to the subject drawn by both geography and tourism researchers showing that tourism in cities is one of the most difficult study areas, due to the complexity of urban structures. The increased attention to the field compared to the pre-1990s, is partly related to the *'boom'* years of tourism in developed and developing countries following the decline of manufacturing industries.

Cities being centres of trade, education, culture and government, have been visited by travellers throughout their history and will most likely continue to benefit from such location-based advantages in the future, providing they are managed, marketed and planned effectively and appropriately. Although the global trends in the economic, social and political arenas, which may have an enormous influence on both manufacturing and service industries, make it difficult to anticipate the future consequences of such trends in the economic sectors, the existing research findings on urban tourism indicates that some issues will continue to be major influential factors when managing, marketing and planning city destinations. These issues include: the need for co-operation among the stakeholders of the sector; strategic planning and marketing required for sustainable development, and; the uniqueness of product packages offered to visitors and, as a consequence, emerging specialised destinations.

CHAPTER 3. MARKETING CITY DESTINATIONS

3.1. Introduction

Heath and Wall (1992, p.7) define marketing as:

> *"managerial process involving the setting of organisational goals and objectives, analysis, planning and implementation. It is a set of activities that results in the formulation of plans and programmes. Through these activities an organisation seeks to bring about a voluntary exchange of values by providing benefits to its clients and potential clients and, through this, benefits to the organisation and its constituent parts or members".*

In light of this general definition of marketing, the aims of tourism marketing are (IUOTO, 1973a):

- to determine and define the market (or markets) that will provide the most productive utilisation of tourism products, services and resources of a given destination and;
- to ensure that these assets and resources are used to plan, produce and sell the tourism product, or range of products, in such a way as to induce favourable buying-decisions by the prospective customers in the defined market(s).

Mainly due to the unique characteristics of tourism *–i.e. intangibility, perishability, inseparability and heterogeneity-*, the sector has always been criticised for not benefiting from newly developed marketing theories and concepts, as it takes time to adapt contemporary issues to the tourism field (Faulkner, 1998). In fact, the sector was one of the last economic sectors to experience the change from *'supply-oriented marketing'* to *'consumer-oriented marketing'* (Calantone and Mazanec, 1991). While supply-oriented marketing places the product on offer in the centre of the marketing activities, consumer-oriented marketing calls for researching consumer needs, wants and expectations before feasible products are produced and promoted in target markets.

However, today, the interest of professional tourism managers and marketers in new marketing techniques, concepts and issues, is increasing, as there are more researchers and academics showing enthusiasm for undertaking surveys, projects and theses on tourism marketing. Destination marketing, which is one of the most researched areas in the field of tourism marketing (Ashworth and Goodall, 1990; Faulkner, 1997; Woodside, 1990; Kotler et.al., 1993; Palmer and Bejou, 1995; Tunnard and Haines, 1995; Holcomb, 1999; Buhalis, 2000; Day et al., 2002; King, 2002), is the main concern of this research and is reviewed briefly in the following section. Following the analysis of the topic with its reference to city destinations, the later sections of the chapter aim to shed light onto the manifestation of four 4Ps of marketing when selling urban areas for tourism, namely place/product, promotion and price.

3.2. Destination Marketing

In his study, Millspaugh (1990) stresses the similarities between marketing tourist attractions and the opening nights of Broadway shows. According to the author, whatever the amount of effort, money and belief put into the marketing activities, the success of a given tourism attraction depends on the satisfaction achieved by the initial visitors who experience the attraction. As the verdict of the audience who attend the opening night of a show indicates partially whether the show will run successfully, the number of visitors who return to their homes with pleasant memories, would provide hints on whether the attraction will appeal to an increasing number of visitors.

A similar approach can be applied to tourist destinations with one exception: tourist destinations embrace various kinds of tourist types, hence meeting the needs of various market segments and procuring the maximum satisfaction achieved by each segment can be challenging. When the manifold tourist services and products and the variety of organisations interacting with visitors are taken into account, the complexity of destination marketing becomes more apparent. Yet, as Laws (1995, p.133) notes,

> *"places become destinations only by attracting large numbers of visitors, that is to say that places become tourist destinations through being made into marketable products"*.

Although destinations can be considered as a single product package to be marketed, the very characteristic of destinations, which is that they consist of many services and products in their package, requires a more systematic and analytical approach in marketing their product offers. Indeed, as Fretter (1993) notes, since the mid-1970s, destination marketing has been widely practised by many countries on various geographical scales *-i.e. marketing towns, cities, regions and countries-*. While the history of place promotion goes much earlier than the 1970s, the earlier attempts to promote destinations to visitors and tourism investors were not always intentional and did not approach marketing systematically through the use of strategic marketing plans and marketing research into target markets. Today, however, the concept of '*place selling*' is replaced by the concept of '*strategic marketing destinations*', which focuses more on the needs and wants of visitors and uses extensive marketing tools ranging from marketing literature to web-sites (Buhalis, 2000).

In contrast to homogenous commercial products, destinations are unique agglomerations with precious cultural and heritage sites and, traditional functions with a *'pulling-effect'* on visitors. Therefore, a marketing strategy that succeeds in one destination may not be adjusted efficiently to another. The starting point for successful destination marketing is, therefore, to clarify the similarities and dissimilarities between the product package of a destination and those of competitors. The marketing strategies, which emphasise the comparative advantages of a destination, tend to be more successful than the marketing strategies adopted from the other success stories in practice.

The marketing efforts of any destination can, only then, give an impetus to the development and management of the destination. However such an impetus would also require effectively chosen target markets, satisfied visitors and locals and a well-identified image associated with the destination in the potential markets. That is why destination marketing should call for a customer-oriented approach.

The goal of destination marketers should be to maximise the flow of visitors and tourism earnings into a given destination, and to minimise the negative effects of mass tourism, which may damage the social and physical environment of the destination. While the product package characteristic of a destination challenges marketers and tourism planners, it is difficult to stimulate visitor numbers to any destination through intensive marketing activities in a short period of time. As Millspaugh (1990) notes, it took Baltimore *-i.e. the most famous success story of urban regeneration in the tourism literature-* twenty years to explore the benefits of destination management, planning and marketing.

In marketing destinations, another difficulty lies in the inevitable need for collaboration among stakeholders of the sector. Considering the variety of organisations and products involved in tourist destinations, it is not always easy to establish a consensus on: how the destination should be marketed; by whom it should be marketed; and more importantly, how the marketing activities should be financed. Some organisations can only take part in international marketing campaigns through becoming members of partnerships and co-operations, while others, which have well-established products and services, might find running marketing activities individually more effective (Middleton, 2001). If the second option is chosen, then the images associated both with the destination and individual tourism products may vary in accordance with the number of marketing campaigns running in the target markets. In any case, agreement should be reached by all the stakeholders of the sector on which image icons should be used in order to secure a clear and united image without any confusion caused in the minds of potential visitors.

3.3. Marketing Cities

Despite the well-known fact that contemporary cities are in competition with each other to attract more visitors, residents or businesses, as Mazanec (1995) stresses, it is not always easy to distinguish competing cities and to evaluate whether their marketing approach is based on systematic grounds. Therefore, in order to assess marketing-related matters -*i.e. effective marketing activities of city marketers and the strategies developed to attract various market segments*- within the framework of city destinations throughout this thesis, a look at the concept of city marketing, competitiveness of city destinations and differing marketing activities to attract visitors, residents and business, is provided in the following sections.

3.3.1. City Marketing as a Concept

While some authors in the literature argue that the globalisation of economic, social and political activities removed the focus upon major cities which play important roles as traditional trade centres and gave a chance to remote places to compete for new investment opportunities, others emphasise the importance of these traditional trade centres with better transportation networks in this globalisation trend started in the 1980s (Sadler, 1993). The recent consensus with regard to the role of urban areas in the globalisation era is that whether remote or not, cities can only be placed on the global trade map as favourable locations depending on the leading authorities' approach to *'place marketing'*.

In fact, city authorities of developed Western countries have been practising city marketing for many years. Ward (1998) cites that the American cities were the earliest examples of city marketing practises. While the initial emphasis of marketing efforts was on attracting residents for the land available for agricultural cultivation and inhabitancy, the improved railway transportation encouraged territorial administrations and state governments to attract new investors and residents to the western cities and towns of the new continent. While the earliest promotion efforts targeting farmers and their families go as far back as 1773 -*i.e. Georgia*-, the author notes that promotional campaigns directed at investors as well as settlers were common in many localities by the 1870s.

European cities were not slow in following the marketing experiences practised by their American counterparts and have discovered the benefits of marketing as an economic device to attract investors and residents (Ward, 1998). For example, Sadler (1993) reveals that Luton Council had a promotional campaign targeting industrial developments and workforces in 1899. According to the author, 85% of county boroughs and 35% of the municipal boroughs and urban districts in Britain were engaged in some kind of promotional activities by the year 1939.

However, although these early experiments of city marketing were trying to promote cities and regions as a commodity package, they were mainly centred on manufacturing industries and aimed at attracting new investment and job opportunities for locals in order to foster economic longevity and well-being of their urban mechanisms. The historical and cultural significance of cities was only mentioned to convince existing residents and new migrants of the living standards.

Still, by 1873, some private excursion organisations such as Thomas Cook, were promoting places and towns as tourist destinations. By 1909, Atlantic City had its own European office in London, which was solely established to promote the city to the British visitor and investment markets (Ward, 1998). However, as Ward stresses, these initial efforts to market cities as tourist destinations, were mainly conducted by individual organisations without any co-operation from the local authorities or the sector stakeholders, and were not based on long-term and consistent marketing plans.

With regard to marketing cities as tourist destinations, the problem faced by many city authorities was, and still is, that the concept of city marketing is not fully understood by marketers and stakeholders of the sector. Even the interest of academics on the subject does not date any earlier than the 1980s, which marks the start of the post-industrial era (Page, 1995).

As Kotler et al. (1993) indicate, city marketing can only fulfil its aims and objectives, when the stakeholders including locals, employees and managers of tourism organisations derive satisfaction from their sector, and when local authorities, visitors and tourism organisations see their expectations met. Without any reference to the main purpose of marketing activities, these authors argue that *'place marketing'* embraces four activities:

- Designing the right mix of community features and services;
- Setting attractive incentives for the current and potential buyers and users of its goods and services;
- Delivering place products and services in an efficient and accessible way and;
- Promoting the values and image of a place so that potential users are fully aware of its distinctive advantages.

The initial outcome of such an approach would be to blend sufficient products and services in product packages, which can meet the expectations of target market segments. However the main difficulty in city marketing is to define the product packages which bring many ingredients together. While marketing activities mainly focus on the tourism products and services found in the boundaries of urban tourist districts and zones, city marketing is surely influenced by marketing activities pursued on wider spatial scales by regional, national and international organisations.

This difficulty of defining a marketable urban tourism product package and identifying a single responsible marketing authority, is further challenged by the dilemma of determining the '*values and image*' of a city, which should be based on the sub-products of the product package and which should be constantly and adequately utilised in promotional campaigns. Besides, since the aim of marketing cites does not necessarily attempt to yield financial profit, but focuses more on achieving long-term social, cultural and economic benefits for an urban mechanism as a whole, it differs from the goals, approaches and applications of marketing conventional goods and products. Such polarities between city marketing and conventional product marketing resulted in evaluating '*city marketing*' in the light of three different marketing concepts: '*marketing by non-profit organisations*'; '*social marketing*' and; '*image marketing*' (Ashworth and Voogd, 1994).

It is a fact that cities can only be marketed effectively, if all the concerned authorities and organisations get together under the same umbrella. Only then the messages of various campaigns would not cause chaos and facilitate the image creation to revolve around certain icons, landmarks and product packages, which address the needs of market segments targeted. Such an approach requires a consensus between all the concerned shareholders and is usually led by a leading tourism authority. Even though public, semi-public or private organisations exist in various countries, which are responsible for accomplishing marketing activities, the main concern of city marketing should be to ensure the long-term social and economic benefits of urban mechanisms. These characteristics of city marketing make its concept related to '*marketing by non-profit organisations*' and '*social marketing*'.

One of the similarities between city marketing and marketing conventional products, on the other hand, is that they both need to base their strategies and activities on the strengths of the products concerned. When marketing products or product packages in accordance to the needs of market segments, marketers usually make use of images, which can be anything in relation to the product on-sale including beliefs and opinions of potential customers. '*Image marketing*', therefore, tries to use well-established images to manipulate the behavioural patterns of selected market segments, while it tries to eliminate the sources of negative images. Because the product packages of cities embrace the images of different sub-products, image marketing becomes quite complicated in the concept of city marketing (*see Section 3.6.3*). However, in many cases, well-known and generalised images are used in the marketing activities of cities, since the main goal is to achieve community-based and long-term benefits rather than to sell individual products and services (Ashworth and Voogd, 1994).

In addition to these three marketing concepts, in their previous study, Ashworth and Voogd assess other marketing concepts and apply them to the British city tourist destinations, while they define city marketing as (1988, p.68);

> *'planning actions designed to initiate or stimulate processes that improve the relative market position of cities in regard to particular activities, such as attracting commercial investment, or improving the effectiveness of service activities whether in the public or private sectors'.*

Table 3.1 summarises the various marketing concepts with examples offered by the authors. It is important to note that the appropriate marketing strategies for each example are linked to the demand characteristics of individual city destinations. But developing marketing strategies requires more than just an analysis of demand. The factors to be taken into account when developing marketing strategies are covered in the later sections of this research.

Table 3.1. Types of Urban Marketing Strategies

Demand Characteristic	Marketing Strategy	Possible UK Example
Full Demand	Maintenance Marketing	York/Chester
Latent Demand	Development Marketing	Lincoln
Negative Demand	Conversional Marketing	Wigan
No Demand	Stimulation Marketing	Leicester
Faltering Demand	Re-marketing	Scarborough
Over-full Demand	(Selective) De-marketing	Bath/Oxford

Source: Ashworth and Voogd (1988), p.70.

In their study, Ashworth and Voogd note a contrast between *'minimal marketing'* and *'aggressive marketing'* practised by public organisations in the field of city marketing. Minimal marketing applies more to well-established products saturated with demand, hence the belief that the product would not lose its share in the market even without promotional efforts to sell more, becomes acceptable. On the contrary, if there is an excess supply, which requires the existing market share of a given product to be expanded, aggressive marketing aims to inform wider groups of potential customers about the benefits of the product.

Within this framework, the term '*city boosterism*' fits aggressive marketing to a certain extent. The trend, which has first started in the United States, has encouraged post-industrial cities to follow the successful revitalisation stories based on the evolution of urban economic systems from manufacture-oriented industries into service-oriented industries. While some cities succeeded in their attempts with the help of new infra- and supra-structure facilities and activities funded by public grants and loans, others failed due to the reasons explained in the previous chapter.

3.3.2. The Nature of Competition Among Cities

As it is the theme of this research, the city, as a marketable product, is taken into account as a product package combining numerous individual products and services. Thus, when the competition among city destinations is assessed, the competition of these overall product packages of urban areas should be considered, which is neither similar to the competition of tangible manufactured products nor the competition among individual hotel outlets, museums or conference centres. This very characteristic of city destinations requires a systematic approach to analyse their market powers and marketing efforts. To start with, it is not always easy to distinguish which city destinations actually compete with each other, and which ones are left out of the league (Melian-Gonzales and Garcia-Falcon, 2003).

In fact, a number of studies have introduced and applied the concept of competitiveness in the area of tourism destinations (Buhalis, 2000; Ritchie and Crouch, 2003; Kozak and Rimmington, 1999; Mihalic, 2000; Pearce, 1997). It has been suggested that there is a need for a clearer understanding of the ability of a destination to compete effectively in an increasingly saturated tourism market (Evans et al,. 1995; Ritchie et al., 2000). Hassan (2000) argues that the planning and promotion of tourism destinations should be guided by a thorough analysis of the destinations' competitive factors and development strategies.

Competitiveness in the tourism literature has been considered as a destination's ability to create and integrate value-added products that sustain its resources while maintaining market position relative to competitors (Hassan, 2000). Ritchie and Crouch (2000, p.306) define competitiveness as '*the ability of a country to create added value and thus increases national wealth by managing assets and processes, attractiveness, and aggressiveness, and proximity, and by integrating these relationship into an economic and social model*'. In fact, competitiveness has often incorporated the concept of marketing planning and competitive development strategies (Bordas, 1994; Heath and Wall, 1992; Kozak, 2001). Pearce (1997), for instance, described destination competitiveness as destination evaluation techniques and methods that can systematically analyse and compare the diverse attributes of competing destinations within a planning context. Mihalic (2000) also described destination competitiveness from environmental perspectives that can be related to natural and man-made tourism components, as well as social and cultural environments.

According to Crouch and Ritchie (1999), meantime, the primary elements of destination appeal are essential for destination comparative advantage and can be key motivational factors for tourists' visits. These primary elements are the fundamental resources that motivate tourists' destination choices, as well as being elements that planners and developers should consider for increasing destination competitiveness. Physical attributes, culture and history, market ties, activities, events and tourism suprastructure are examples of these resources. Additionally, their model explains the supporting factors and resources as secondary effective sources of destination competitiveness. The extent and condition of these factors, such as infrastructure, facilitating resources and enterprise are critical for destination business success.

According to Poon (1993), destination competitiveness could be enhanced by permanent innovation and ceaseless change. Flexible, segmented, customised products for the tourists' needs are necessary to create competitive tourism destinations. Organisation, management, marketing, distribution and other forms of interaction and interrelationships among tourism suppliers are fundamental sources of developing flexibility in tourism. In order to compete successfully, tourism destinations and their actors should follow such principles as '*put the consumer first, be a leader in quality, develop radical innovations, and strengthen (the individual organisations)' strategic position within the sector's value chain*' (p.240).

With regards to the competitiveness of city destinations, Mazanec (1995) emphasised that it is sometimes similar market segments attracted by two cities, which make them competitors. However, the concentration of marketing efforts to attract conference visitors or shopping visitors by two different city destinations does not necessarily mean that these two cities compete with each other to win more businesses. In this instance, the major visitor generating markets can be taken into account. If two cities try to attract conference visitors from the same generating markets, then the competition between them can be explained more sensibly.

The author (p.283) adds that many European destinations base their marketing strategies on a geographical segmentation of target markets and according to the attractiveness of the origin countries, which have a remarkable share of their visitor profile. The author suggests that the more similar two destinations are in terms of their visitor mix, the more the tourist authorities and city marketers feel in competition with each other. While the author adds that such an indication of competition among city destinations used to be related to overseas markets from which destinations compete to get more visitors, cities have recently started to develop marketing strategies to compete with their national competitors as well. Regeneration programmes and marketing efforts of local planners to build up strong '*tourist destination*' images for post-industrial cities have accelerated the emergence of competition among such cities to win more both international and domestic visitors to their product packages.

As discussed in the previous chapter, following the on-going economic recessions causing the decline of the manufacturing industries in the developed countries in the 1980s, cities have moved toward a new phase in their evolution process in which marketing their strengths has been practised by the leading urban organisations to create new resources for the diminished economic wealth of urban mechanisms. This new phase of urban change, complicated by the globalisation process and the technological developments easing accessibility and communication interactions around the world, has forced decision makers in so-called '*post-industrial cities*' to approach their cities as marketable commodities. Since the number of cities whose local authorities acknowledge the need to present their cities as marketable commodities in order to sustain their economic structure, continue to increase, the competition among cities has become fiercer than ever. Such fierce competition has led academics to consider the identification of '*winners*' and '*losers*' of the urban market within the concept of '*urban hierarchies*' (Short, 1984; Bramezza, 1996).

The fact that cities evolve through time, hence requiring strategic approaches to develop and improve their product packages, the unique characteristics of individual cities play a significant role in deciding their success in competitive markets. The polarities of the aims and goals drawn by local authorities on the reasons of involvement in marketing activities, show varieties, too. Although the common aim is, in many instances, to sustain or to revitalise the economic structure of urban mechanisms, the markets targeted may lead to differences in the methods to market individual cities. Empirical studies show that many cities have undertaken waterfront redevelopment projects, have organised national and international fairs, congresses and exhibitions and have volunteered to host sports events in order to establish advantageous positions in the competitive city destination market (Hall, 1994; Rubalcaba-Bermejo and Cuadrado-Roura, 1995; Morgan et al., 2002).

Despite the difficulties in identifying the required '*success components for competing cities*', some fundamental and common conditions for a city to perform any competitive urban function can be specified. Bramezza (1996) splits such conditions into two factor groups: '*traditional*' and '*non-traditional location factors*'. The author relates the economic development of a city and its attractiveness as a place to live, work and visit, to location factors. Traditional location factors constitute the aspects of the city such as: the availability of labour force; the strategic position of the city; the availability of land and premises, recreation opportunities and tourist attractions.

The existence of such traditional factors in a city does not mean much without an operational network of urban management and marketing to create or to enhance links between urban products and the target markets. Such managerial networks are called non-traditional location factors, which ease accessibility between the city product and its potential users. Because non-traditional location factors are related to how cities are managed and marketed mainly by public authorities, they are mainly shaped and influenced by local policies and regulations. Competitiveness of a city, therefore, is determined by how these traditional and non-traditional location factors are harmonised within the city product package and what the strengths and weaknesses of the augmented product are compared to those of rivals.

In a similar approach, Van Den Berg et al. (1995) developed a model showing the relationship between all these location factors which determine the attractiveness of city destinations (*see Figure 3.1*). The authors relate the attractiveness of a city destination, first, to the quality of its primary and secondary tourist products, clearly linked to the overall image of the city. Second, the ease of accessibility is split into two factors. While external accessibility is defined as the efforts needed to reach the destination, internal accessibility refers to the transportation facilities provided to visitors within the city. Finally, the authors argue that, for a city destination to be attractive, all of these interrelated traditional location factors should be developed, planned and executed effectively by urban management and marketing authorities with comprehensive tourism policies.

Similarly, in their research analysing the competitiveness models existing in the literature, Faulkner et al. (1999) stress that an ideal destination competitiveness model that would shed light onto the success determinants for advantageous positioning of destinations in a competitive market, should cover both traditional and non-traditional factors. The authors split the non-traditional factors into: appeal; management; organisation; information and; efficiency. While primary tourist products of destinations such as major tourist attractions are essential ingredients of such a model, completing the supply scene of the tourism sector with managerial factors such as: the efficiency and consistency of tourism policies; organisational structure of the sector and; networks established by tourism organisations to strengthen the competitiveness of a particular destination, seem to be of greater importance to destination-choice models.

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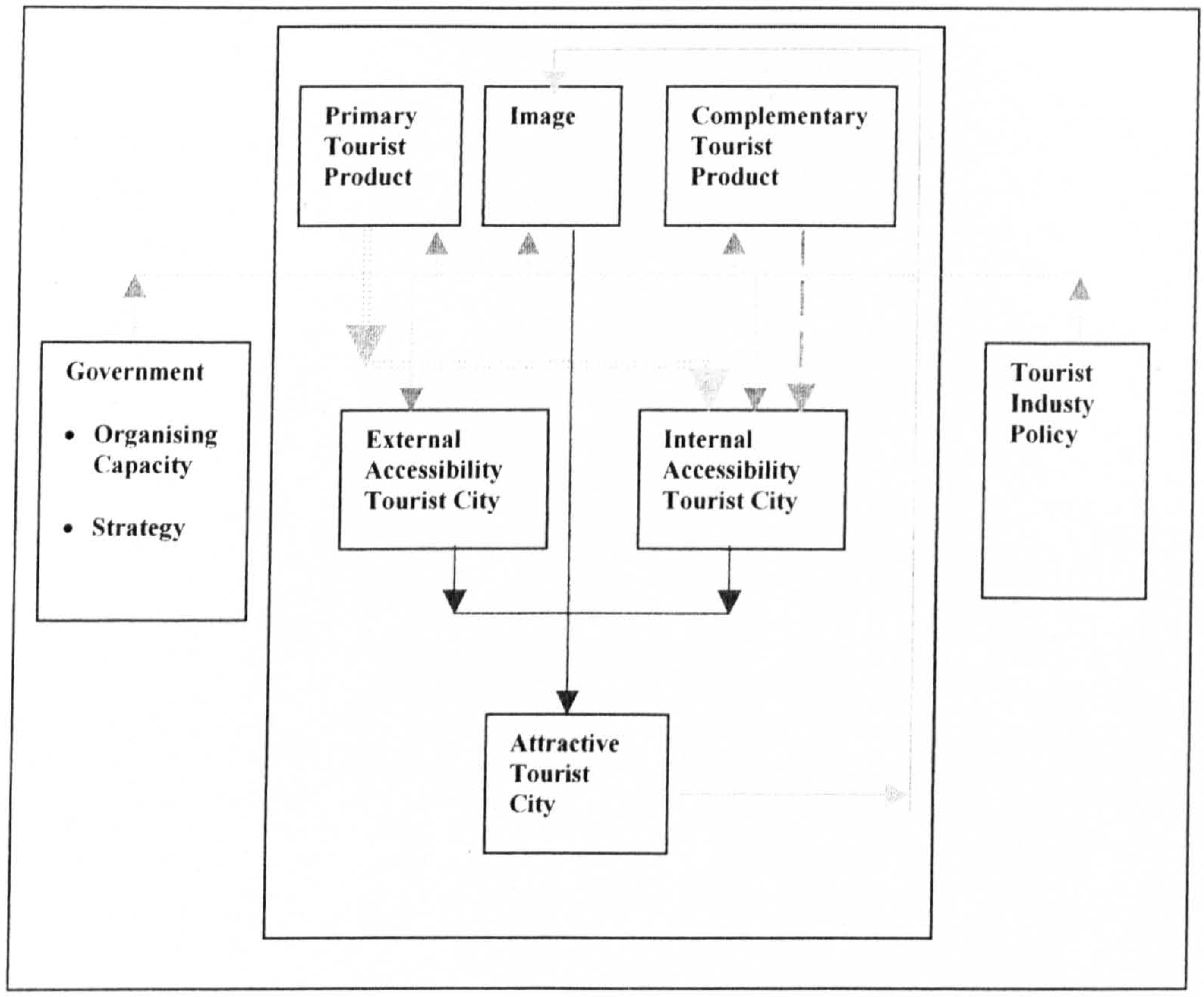
Figure 3.1. A Model of An Overall Attractiveness of a City Destination



Source: Based on Van Den Berg et al. (1995).

Unfortunately, as the authors further note, such non-traditional factors do not seem to get the attention they deserve from city marketing practitioners and urban planners when investigating competitive positions. The absence of some product components in '*a competitiveness measuring model*', however, would limit the outcome of an investigation, as it may lack the contribution of these components on competitive positioning of a destination and also, their influence on the well-being of the tourism sector.

Thus, within the concept of competitiveness, it is usually easier to compare the traditional location factors of city product packages, as management and marketing applications become complicated administration efforts pursued by various organisations in individual cities. The factors like the unique characteristics of the supply elements of a city product, appropriate infra- and supra-structure, safety of the city, its accessibility to target markets, and its image enhanced by the high standards of quality of life ease, to a certain extent, the assessment of the relative competitive positions of cities with each other.

Image is surely the most influential traditional location factor, which shapes the perceived competitiveness of cities by target markets. As Broadway (1997) describes, an image of a city, sold to potential visitors, investors and residents, is highly associated with the process of the comodified city product. Thus, a well-created, developed and improved image should ideally be placed at the centre of marketing efforts to send a clear and desired message to the potential buyers of the city product. While an image of the city should reflect the development and improvement of supply-side elements, it should also be supported by coherent and long-term marketing and planning activities to be pursued by all parties. An ideal image of a city should be constituted of: its heritage sites; its vibrancy; its safety; its environment as a modern trade, business and communication centre; its accessibility; its characteristic architecture and; its relative cheapness as a place to live, work and visit in comparison to other cities in the market (Mullins, 1991; Morgan and Pritchard, 1998).

Overall, Bramezza (1996) identifies five challenges for cities to strengthen their competitiveness in a given industry;

- Because the market is very competitive, cities must individualise the best investment opportunities at the right time and place. A precondition for urban development is the ability to organise themselves better to exploit their potential.
- New activities have to be developed or old ones exploited by identifying new market niches for generating income, allowing new investments, creating new employment opportunities and increasing the financial capacity of cities. Economic activities should produce new income sources, hence increasing the advantage of a city to attract new investment opportunities, and raising the quality of life.
- Cities should try to strike a balance between economic development and the quality of the living environment, as this appears to be an essential precondition for economic growth.
- Cities have to strike a balance between the economic development and their spatial organisation and then relate economic development to space, as space has become scarce. There seems to be an excessive specialisation and functionalisation of urban space. Besides, there is growing encroachment of external space (through the development of global networks) on the urban space. It looks as if the city has become multidimensional, with negative effects on citizens.
- Last but not least, cities need to strike a balance between economic development and the social environment, which is the precondition for the success of urban revitalisation projects, with a long-term view to sustainable development.

Short (1984) argues that urban winners which have managed to accomplish such conditions to strengthen their position, benefit from '*the process of cumulative success*': the success of a city in attracting new investors, residents and visitors strengthens the image of the city further and causes cumulative attention to be directed on the city and its product package. Urban losers, on the other hand, suffer from the effects of decline with closed down businesses, the flight of residents and a lack of attention by potential visitors. Clearly, since private organisations may hesitate to invest in such trouble spots, government support and subsidies are needed before the negative image develops further.

In addition to the above-mentioned supply-oriented approaches to identify urban winners and losers, Grabler et al. (1996) emphasise a demand-oriented analysis and a combination of supply and demand-oriented analyses to reveal the competitiveness of city destinations. A demand-oriented comparison of competing destinations focuses on the levels of perception, expectation and satisfaction of potential and existing visitors to particular city destinations. The scaling and mapping techniques used in academia can be cited as examples of demand-oriented comparisons of competing destinations (Mazanec, 1995). As mentioned above, Mazanec analyses the competitiveness of the major European city destinations by using self-organising maps which mainly suggest that two cities, which have similar visitor profiles, tend to be in more competition than the cities that have distinctively different visitor profiles. However, as Mazanec adds, such methods are rather determinative tools, which suffer a lack of application studies and should be used for exploratory analysis.

The difficulty with such demand-oriented analyses lies in with the problems of obtaining information on the beliefs, opinions and attitudes of visitors who may be defined as potential visitors for more than one destination. In fact, an effective demand-oriented analysis clearly depends on detailed research into the behavioural approaches of visitors during their stay in a city destination, prior to travelling into the city and after they return to their origin of residence. This is not an easy task especially since the topic is the comparison of the attitudes of visitors toward various city destinations and their complex product packages.

Grabler et al. (1996) suggest a combined analysis to mitigate both the difficulties of conducting a demand-oriented analysis and the incomplete grasp of a supply-oriented analysis of the whole sector in city destinations. In addition to examining location factors, a combined analysis looks at statistical information on demand characteristics of city destinations and tries to investigate the effects of general holiday-decision-making trends on city destinations.

To conclude, the globalisation process characterised by the free move of capital, labour and visitors and the advanced technological and communication developments, made the competition among cities fierce and on a worldwide scale. To improve their image as a world city, public and private organisations of cities are involved in marketing activities to (re)build their economic, social and spatial structure and to attract investors, residents and visitors

(Bramezza, 1996). Since the need of financial sources to market cities is immense, the responsibilities of urban decision makers and city marketers involve competing for national and international funds, grants and loans to develop, plan and market their product packages.

In the literature, a number of conceptual models and approaches to developing destination competitiveness have been explored, but empirical studies and results related to testing and validating the proposed models have been limited. Particularly, the development of destination competitive strategies has not been thoroughly addressed. Moreover, it has not been found which competitive strategies are more supported by tourism stakeholders in association with destination attractions and resources. The support of tourism stakeholders could aid in the design and selection of competitive strategies for tourism destinations that could enhance competitiveness as well as provide social/economic benefits and welfare to the destination communities.

3.4. City Tourist Destination Marketers

As noted previously in this chapter, city marketing has been applied more systematically and strategically over the last few decades by local governments, business interest groups and the tourism stakeholders compared to the early practises of *'place selling'* (Ward, 1998). As the city destination product is an amalgam of various tourist products and services, the marketers of such a product package are numerous. While the lead is usually taken by tourist offices, convention bureaux and partnerships to run corporate marketing activities, a city destination can surely be marketed by its residents, visitors and small and medium sized organisations, as well. Indeed, the effects of word-of-mouth marketing on decision-taking process of visitors are also unarguable.

However, when it is to measure the effectiveness of corporate marketing activities, researchers are bound to focus on assessing the marketing plans prepared by those city-wide marketers, as they take city destinations as overall product packages rather than individual products or services. Therefore, defining the role of a leading tourism organisation (LTA) is critical. In the existing literature, LTA is often referred to as a Destination Marketing Organisation or a Destination Management Organisation (DMOs) (Gartrell, 1994; Perdue and Pitegoff, 1990; Goeldner et al., 2000; Buhalis, 2000; Akehurst, 1998). Wober (1997b) argues that planning at a municipal level is the most important aspect of tourism as the resources utilised for the sector come from the local level. One can ascertain based on several studies of DMOs, that marketing is viewed as a key function. Approaches to researching this function have varied from advertising and tracking techniques, to strategic marketing and research (Perdue and Pitegoff, 1990; Woodside, 1990; McWilliams and Crompton, 1997; Buhalis, 2000; Masberg, 1999;

Fesenmaier et al., 1992). The limitations of these studies are that a singular function may not dictate how successful or unsuccessful a LTA may be. With the complexity of the tourism system and the multitude of stakeholders involved, their approach may be too narrow in scope. Also, the influence of a LTA on the overall success of the destination is a phenomenon that has been studied in a very limited way. Within this broad approach, another necessary research question is how the stakeholders at the destination perceive the LTA's influence on tourism success at the destination.

3.4.1. The Importance of Tourism Organisations in Marketing Cities

Tourism organisations in a city destination aim to sell their products and services through an established network of communication between potential visitors and the destination. In fact, without the promotion efforts of public and private sector members of the sector, generating visitor flows into the destination may be minimal. Through informing potential visitors about the tourist product package, tourism organisations may strengthen the image of the destination and may reduce '*the risk of the unknown*' for visitors. Such a process encourages many people to consider travel to a city destination who otherwise may either travel to other types of destinations or prefer to spend their holidays in their own area (Holecek, 1993).

In an ideal urban destination setting, there is a leading tourist authority (LTA), which executes the overall marketing activities based on strategic and long-term marketing plans for the tourism sector of the city. The main aim of such an organisation can be summarised as to develop and implement marketing plans and to integrate all of the marketing activities pursued by the stakeholders in order to achieve the most effective use of the tourism products and services of the city (Cook and Azucenas, 1994). Gartrell (1994) argues that marketing is the LTA's (or DMO's) core competency and thus it should focus resources on this function. Some other studies have investigated the structure and management scope of LTAs (Holcomb, 1999; Akehurst, 1998). The conclusion drawn from many of these studies is that LTAs are utilising resources mainly for promotional strategies as opposed to overall management and comprehensive marketing.

Haines (1993) argues that tourist boards need to create stronger information systems that track effectiveness. Yee (1996) states that a tourism organisation requires effective intelligence strategies and procedures in order to ensure success. Buhalis (2000) argues that little research has been focused on the effectiveness of destination marketing. He also states that increasing the benefits for all tourism suppliers is essential and must be accomplished through effective leadership and government involvement in managing rather than just promoting a destination. Fessenmaier et al. (1992) found in their study of LTAs in Indiana that the majority of these organisations focused on promoting a destination. They also concluded that fragmentation causes redundancy and inefficient use of resources at a local level for which they argue that an LTA could mitigate through managing the entire destination to achieve cohesiveness of suppliers and effectively implement strategies. Judd (1995) states LTAs are the best organisation to synthesise the multitude of products and services in tourism. Van den Berg et al. (1995) argue that LTAs must effectively coordinate efforts with governments, other tourist boards and the private sector to ensure maximisation of benefits from limited resources.

According to such existing research, LTAs have often chosen to be more marketing than management entities. This may be the result of several issues. First, fragmentation of tourism suppliers is high, making it difficult to present a unified front to government officials, special interest groups, and ordinary citizens. An LTA may see this role as too daunting. Second, tangibility becomes an issue in an organisation that must demonstrate to its stakeholders the utilisation of funds. Marketing, specifically the promotional side, is concrete and visual. This allows the LTA to present a tangible product. Third, with the ever-increasing competitive environment of tourism both nationally and internationally, the pressure is on the LTA to lure visitors to a destination. Finally, with the majority of LTAs being partially, if not wholly, funded by government monies, accountability for and return on investment expect from the LTA not only from government, but also other internal stakeholder groups. An argument may be made that tourism requires the direct intervention of government as the impact of tourism on a destination is immense. With visitors consuming local resources, using destination infrastructure, and interacting with residents, the influence of government in potential tourism issues is expected.

Still, LTAs can be established as public, semi-public or private sector authorities. This depends on the national government policies and their effects on local planning and management structures. While the dominance of public LTAs is especially apparent in developing and many developed countries, examples of private and semi-public LTAs are found in the USA and some European countries.

In addition to their marketing tasks, LTAs represent the tourism sector to governments; unite various tourism plans and projects to achieve common goals; conduct marketing research; run visitor management programmes to enhance visitor satisfaction; strive for the improvement of tourism infrastructure and; seek funds, grants and loans to run their operational functions. Obviously, depending on individual destination tourism plans, the responsibilities and tasks of these organisations can be expanded. But, as Jefferson (1990) describes, LTAs are *'the patrons'* of the sector and the product package of a city destination and, are thus directly concerned with *'product development'* and *'product presentation'* as well as *'marketing a product package'*.

Regardless of the fact that specific aims and goals may vary for individual destinations, the principal aim of LTAs regarding marketing a city destination is to establish a communication network to inform potential visitors of tourism offers. Laws (1995) lists three difficulties that LTAs need to deal with when communicating with potential visitors:

- Most of the potential market segments are overseas, hence are remote in spatial terms;
- The culture within which potential visitors live is often relatively unknown to the managers and planners of LTAs and;
- Focusing the promotional effort on those most likely to visit the destination is difficult.

In order to overcome such problems, the managerial function of a city destination needs to be defined effectively and clearly by sharing various tasks and responsibilities between numerous tourism organisations depending on their capacity to absorb these responsibilities and to activate them to strengthen effective participation in communal management and communication network. To do that, LTAs should have the responsibility to bring all sector stakeholders under the same umbrella in order to harmonise various marketing plans and strategies of individual organisations and to establish *'consistent'* marketing plans concerning the destination as a total product package. Such a systematic and collaborating view can only be achieved by strengthening the internal communication network among stakeholders first. Acquiring the support of governmental bodies on marketing plans; tracking national tourism policies and new tourism developments; ensuring community empathy and attachment to tourism and; overseeing the economic growth of an urban mechanism and the place of tourism in the future plans are also vital for the effective and long-term functioning of city destination marketing.

To conclude, a strong relationship between urban management and urban functions is a precondition for the feasibility of an efficient and adequate destination marketing policy to increase the competitiveness of cities. Marketing activities can only achieve desired and targeted aims and goals, if products and services offered meet the expectations of potential visitors from the destination. No matter how effectively tourism organisations try to market a city destination, it is destined to be *'a loser'* in tourism markets without sustainable tourism development plans and standardised quality of tourist products and services. Comprehensive marketing strategies should relate to the overall urban system and aim to satisfy the needs of potential visitors as well as the local community. Successful tourism marketing by stakeholders is that which can help the realisation of such strategies (Bramezza, 1996; Buhalis, 2002).

3.4.2. The Major Tourism Organisations in Cities

All tourism stakeholders play an important role in the process of developing and marketing the concerned tourist product package to various market segments. In fact, the geographical distribution of tourism organisations within city destinations and outside their boundaries would mean extending the number of organisations which one way or another play an influential role in marketing urban areas either for the sake of tourism or for other purposes. In this sense, regional, national and even international organisations can be taken into account as destination marketers or tourism developers and planners in the general meaning of these terms.

In fact the '*transnational*' character of the industry forces countries to expand their boundaries and to harmonise national policies within a wider geographical perspective by becoming members of international organisations (Bramham et al., 1993a). While urban tourism planning and development is strongly tied to the regional and national tourism plans and projects of countries, the sequential effects of international tourism organisations on tourism development and marketing progresses from the national to regional, and to the local scale of cities. Indeed, tourism organisations at the international level which include the World Travel Organisation (WTO), the European Federation of Conference Towns (EFCT), World Travel and Tourism Council (WTTC) and the International Association of Convention and Visitor Bureaus (IACVB), all have influential roles in shaping visitor trends, international policies and regulations, promoting tourism education and training, new forms of tourism developments and monitoring the development process of member destinations.

These international organisations may not directly involve promoting destinations, but their co-ordinative and correspondent role in international tourism, encourages member destinations to approach both tourism development and marketing more systematically at a national level, which would hierarchically reflect its consequences on smaller geographical scales including city destinations. Hence, it would not be too awkward to suggest that such international tourism organisations are '*indirect marketers*' of destinations. Nevertheless, in some cases, the responsibility of an international organisation to market a particular destination can be direct, too. For instance, Greenpeace was invited on to the planning team for the Sydney 2000 Olympics bid in order to assist in the promotion of the Games as a '*Green*' event (Hall and Jenkins, 1995).

In this chapter, however, the attention is paid more to those *'direct'* marketers of city destinations, which are mainly located within the boundaries of urban areas. While the organisations are first divided into two groups according to their ownership *-i.e. public and private sector organisations-*, each group is also split into various organisations, which undertake marketing activities on different levels, and in different ways *-i.e. a leading tourist authority, tour operators and business interest groups-*.

3.4.2.1. Public Sector Organisations

Public sector involvement in the tourism sector is especially imperative at the initial development phase of tourism in destinations. Initial attraction and infrastructure development in destinations requires public sector support in terms of financing, planning and managing tourism. Due to the large amount of funding and corporate planning required at such development phases, private sector organisations may find it risky to undertake overall destination development projects which may take some time until the capital invested is fully returned. Thus, government intervention becomes inevitable through the provision of grants and subsidies to develop the sector on an on-going development process. However, it is a fact that the efforts of public sector tourism organisations move from regulating and planning towards marketing and managing the tourism functioning of destinations once appropriate visitor flows are achieved and the growth becomes consistent (Haywood, 1992).

Similarly, a public leading tourist authority (LTA) decides on the type and scale of tourism development in line with the social, economic and environmental needs and characteristics of their urban mechanisms at the initial phases of tourism development. As Glyptis (1991) notes, a local LTA can be equipped with responsibilities and tasks by higher regional or national governmental authorities and can be a service provider, a regulator, a consultant, a promoter, a development agency or a funding provider. Since they are the official representatives of the tourism sector in their destinations, they have an overall view of the needs and wants of tourism businesses and the characteristics of potential and existing visitors.

Therefore, with regard to the effective marketing of city destinations, LTAs play an important role as *'sector composers'* whether or not they are actually involved in marketing activities. Their tasks of monitoring and managing the sector, conducting research on tourism and establishing a consensus among stakeholders make them essential affiliates of corporate city marketing, and in many cases, put them at the top of the hierarchical list of city marketers. Moreover, their role as *'the leader tourism organisation'* in a city, which requires the employment of skilled and experienced professional managers and marketers, facilitates the process of attracting the attention of various stakeholders (Gartrell, 1994).

The organisational structures of public LTAs show polarities in different cities. While it is mainly an official governmental authority in city destinations responsible for promoting and developing tourism, its organisational structure and responsibilities depend on political, economic, social and cultural backgrounds of the city destination concerned. The importance of tourism for the urban economic system and the geographical location of the city are also important determinants for the structure and functioning of an LTA.

Soteriou and Roberts (1998) list two basic forms of public tourism organisations, which can be adapted to LTAs. First, an LTA can be established as an urban authority, which is an official branch of a higher regional or national authority. In this form, an LTA works in co-operation with other urban authorities and is responsible to the national tourism authority or to the greater city council, mayor or governor. Second, an LTA can be structured as a governmental agency or bureau within another urban authority such as transportation, environment or culture boards of cities. As the responsibilities of this type of LTA are limited, it is ideal for destinations where tourism is not very well-developed, but has the potential to attract small numbers of visitors. The authors also mention LTA types formed as private and semi-public authorities, which will be covered in the following sections of this research. However, it should be added that the type, size and structure of a public LTA in a destination is influenced by the fragmented nature of the sector and government's approach to tourism and its place in national economic and development plans.

Similarly, the organisational structure of an LTA and its divisions and departments depend on the importance of tourism in a city, the visitor mix structure, national dependency on tourism and the specified tasks and responsibilities of the LTA, which should be integrated within an overall urban planning and may be shaped by regional or national tourism authorities (Wober, 1997a). However, in a city destination in which, the tourism sector is developed or urban planners aim to develop the sector, the LTA would have divisions like planning and development, statistics and research, education and training and marketing services (WTO, 1994).

An example of an LTA organisational structure would include a managing director, who is responsible to a higher commission board with representatives from various governmental authorities and, would also include departments such as marketing operations, tourism projects and attraction development, research, finance and accounting, personnel and administration, accommodation operations, training and education and, if a separate convention bureau is not established, convention and conference departments (*see Appendix 2 for an example of a LTA organisational structure*). LTAs may limit mission and may pursue only some of these functions, while some are managed by other urban authorities. The variety of departmental sections and their tasks clearly depend on the number of qualified staff, who are skilled to undertake related tasks and the budget allocations funnelled into the LTA which enables them to employ appropriate staff and other required management maintenance to activate their functions effectively.

In fact, in whatever form an LTA is structured, public LTAs are established as non-profit organisations and are funded through government subsidies, grants and loans, and membership fees collected from the member stakeholders. One of their major goals is to ascertain sustainable tourism growth without harm caused by the sector to the social, environmental and physical systems of urban areas. Hence, once the carrying capacity of the destination is reached, a responsible LTA should take precautions to discourage visitors to the destination. Therefore, an LTA cannot be a solely profit-oriented organisation. This explains why governments interfere with local tourism planning, management and marketing and appoint public tourism authorities in destinations.

Other reasons for government involvement in the tourism sector may be listed as follows (Akehurst et al., 1994; Hall, 1994; Bramham et al., 1993a; Wanhill, 1998; Page and Hall, 2003; Geerts, 2000):

- Economic Reasons:
    - Tourism can be a driving force in sustainable development and has enormous potential for helping to regenerate post-industrial cities;
    - Tourism creates new employment opportunities for locals and brings new income sources for businesses;
    - Tourism diversifies urban economies, and creates new sources for public revenues through taxes, which improve the balance of payments of the country.
- Social and Cultural Reasons:
    - Tourism can help create a more inclusive society by enabling more people to enjoy the benefits of attractions and recreation facilities, which as a result helps increase the standards of living in cities;
    - Tourism helps create a cultural awareness of an area and boosts *'civic pride'* among locals;
    - Tourism can be developed as a common good through educating locals, tourism employees and also the investors and managers of other industries.
- Environmental Reasons:
    - Tourism plans and regulations can be used as instruments for creating awareness of environmental issues;

  - Sustainable development of tourism ensures the protection of heritage sites, monuments, parks and other natural resources of an urban environment;
  - Tourism encourages a detailed mapping of urban space and zones, and their balanced use by tourism and other urban functions.
- Political Reasons:
  - Tourism promotes the political regime of urban, regional and national governments and helps to broaden its acceptance by visitors;
  - Government involvement in tourism planning ensures that tourism development is consistent with the political ideology and the other development projects and plans of governments;
  - Even though local tourism plans are not developed by public authorities, governments may aim to provide planning, co-ordination, research and statistical support for tourism policy formulation.

The above listed reasons force national and regional tourism authorities to transfer some of their responsibilities to local LTAs to secure effective and sustainable functioning of tourism in city destinations. Similar to the reasons for government interference in tourism, LTAs aim to fulfil all of the above goals of tourism involvement on a smaller geographical scale. However, as mentioned above, considering the scarce resources provided to many LTAs, their activities tend to be directed more towards promotional efforts than overall tourism policy-making. Their activities range from providing information services to hotel reservations made in their visitor bureaux. Their marketing activities, on the other hand, vary depending on their budget allocations, the characteristics of the destination, marketing activities of the other city marketers and regional and national tourism organisations and, the partnerships established among sector stakeholders.

Nevertheless, Laws (1995) identifies some of the most common marketing activities of public destination marketers as: to identify primary secondary and opportunity markets for the tourist product package on offer; to build up a communication system with these markets and; to maintain and increase the market share of the destination. Table 3.2. lists some of the marketing tools used to serve these marketing needs of destinations by undertaking activities both at the destination and in the generating markets.

Although the only organisation concerned with the overall product package of a city destination is its LTA, empirical studies suggest that many LTAs suffer from the lack of funding generated from government subsidies, grants and loans and membership fees which limit their marketing activities in scope (Haywood, 1992). While their efforts concentrate on visitor information services, domestic and overseas marketing campaigns and attending travel and trade fairs, the other components of a marketing mix like pricing, distribution and product development are rarely pursued.

Table 3.2. Promotional Functions of National Tourist Offices

In Resort	*In Tourist Origins*
Welcome service	Joint marketing
Tourist Information Centres	Arrange familiarisation tours for travel staff and journalists
Respond to individual visitors	Workshops for trade and public
Promote individual attraction	Respond to consumer enquiries

Source: Laws, (1995), p.116.

Another reason, which limits the activities of LTAs to run effective and exclusive marketing of city destinations, is the diversity of other governmental authorities and organisations involved in the decision-making process. Political regulations and procedures become bureaucratic obstacles to taking quick and strategic actions. Consequently, LTAs put too much effort into negotiating with politicians and governmental authorities about the needs for tourism development in their cities, while tourism plans get postponed due to waiting for official approval.

3.4.2.2. Regional and Local Tourist Bureaux

In addition to the main management office of an LTA, visitor and tourist information centres (TIC) are located near the major tourist attractions and tourist zones in city destinations. Such centres can be anything from a little kiosk to a large showroom embracing souvenir shops, booking desks, tourist guides and translation services, exhibition rooms, informative visual shows about the destination, etc. TICs usually display all of the available promotional literature on city destinations such as brochures, maps, leaflets about attractions, hotel guides, event calendars and destination-specific information such as weather and road conditions, emergency and safety rules and regulations (WTO, 1993).

Because TICs have the advantage of establishing a one-to-one relationship with individual visitors, their power to influence the product-buying behaviour of tourists in favour of various urban attractions and tourist services is remarkable. However, there are several points to be checked when judging the effectiveness of a TIC as a city marketer. Firstly, TICs should be located in the part of a city where visitors are in high density, and should be sign-posted and shown on maps clearly to enable visitors to find them easily. Secondly, they should be designed to provide information to all types of visitors. TIC staff should be trained to welcome visitors and to answer their questions appropriately. For instance, the special needs of disabled and elderly people should be met and they should be informed about the services provided for them by various tourist organisations. Finally, the information provided to visitors at TICs should be updated regularly to inform visitors about the most recent developments and events taking place in the city destination.

A regional tourism organisation (RTO) is another level of destination marketing organisations. Conceptually, RTOs can be divided into three structural formats: multi-country; multi-state; or multi-district within a state or a province. One example of an international RTO is the Pacific Area Travel Association (PATA) founded in 1951. The association was created to develop, promote and facilitate travel to and among the destination areas in and bordering the Pacific Ocean (Gartrell, 1994).

3.4.2.2.1. Public Information and Convention Centres

One of the specific marketing bodies of city destinations are convention centres which are sometimes formed as a separate organisation from the main tourism authority (LTA), and are often entwined within the LTA under the name of a visitor and convention bureau. In any form, their main task is to develop so-called conference tourism in a city destination by promoting its convention and conference facilities. While the need for close co-operation between the LTA and a convention bureau of a given city is obvious, the convention bureau also needs to have good relations with conference and exhibition centres, hotels, meeting and group planners and, universities (Gartrell, 1994). They should be the representatives of the conference tourism business to all the concerned authorities on the matters related to the needs of the industry to be more competitive by, for example, projecting new conference halls, attracting international conferences, exhibitions and conventions and, targeting certain conference markets.

Although convention centres can be established as private organisations funded by membership fees, they are not-for-profit organisations, which receive funding from governments through grants and loans. While their marketing efforts are more towards event organisers and international organisations, which organise regular events, the influence of an international conference, exhibition or a special event on the image of the host destination can be so remarkable that it can be associated with the event for years. For example, London, Brussels and Paris have been associated with the international tourism travel fairs as the leading European host cities for many years and benefit in both bringing industry professionals together and promoting their product packages to international intermediaries during the fair.

3.4.2.2.2. City, County and National Government Offices

Public organisations responsible for the public ownership of land, the urban environment, infrastructure, housing, traffic and transportation and the provision of public services such as sewage, electricity and water, all play an important role in the process of tourism development in a city. Even the defence departments, such as the police, play a part in the establishment of a safe urban environment for both visitors and locals (Page and Hall, 2003). Since marketing destinations covers promoting and developing tourism products and services, all these urban authorities can be counted as city marketers to a certain extent. In fact, since marketing a destination would not produce effective outcomes without ensuring the sustainable maintenance of urban services and protecting the urban mechanism, the term *'city marketers'* should include all the concerned urban authorities, while the relationship among them should be strengthened.

On a nation-wide scale, governments are considered to be responsible for the enactment and implementation of laws and regulations with a relatively less influential role of managing and marketing economic sectors. In the case of tourism, however, governments are supposed to play a more active role in the utilisation of the sector. To start with, governmental sectors own and manage much of the infrastructure upon which tourism depends (Gunn, 1994; Goymen, 2000). Besides, in addition to the economic, social and environmental benefits of tourism, governments may benefit from tourism as a national policy instrument to improve their international relations with other nations. Their power to control the functioning of tourism organisations and the standards of services provided to visitors enhanced by their control power of the national tourism promotion and development plans, makes them the leading ruling, monitoring and regulating authority in their country. Hence, the local tourism policies and strategies of urban areas tend to be sieved through the hierarchical policy levels of the countries, which include national, provincial, regional and local administrative and policy-making authorities (Hall, 1994).

Governments may further expand their active role in tourism promotion and planning by operating state-owned tourism organisations such as airline companies, tour operators and even hotel operations. This way, they eliminate the disadvantages of marketing a product package, over which the control of public authorities is limited, since the majority of tourism organisations are privately-owned. However, they may also minimise their tasks interfering with the operational structure of the tourism sector in urban areas and appoint quasi-public or private organisations responsible for the marketing of city destinations. In any case, since the national tourism policies, which have direct influence on local and regional tourism plans and policies, are formulated by governments, their absolute withdrawal from the scene of urban tourism policy-making and marketing is difficult, if not impossible (Hall, 1994; Geerts, 2000).

3.4.2.3. Private Sector Organisations

The privatisation of urban services and management is both criticised and supported by academics, governments and professionals. Criticism has been made mainly because of its tendency to overlook *'public good'* which suggests that urban services and facilities should be developed for the benefit of all urban communities including minorities, workers and residents. It is thought that privatised public services do not effectively benefit from the economies of scale and are concerned more about maximising the profit earned than serving social, environmental and cultural communal needs. Besides, public sector leadership in tourism marketing is considered to be more effective in bringing sector stakeholders together in order to execute corporate marketing activities beneficial to public good rather than to individual organisations (Hinch and Slack, 1997).

However, it is a fact that public management in urban areas has its own disadvantages including: the lack of professional skills and enthusiasm for new projects; bureaucratic obstacles to solving unexpected problems quickly; the lack of creativity caused by tight and formal governance systems and; not keeping good track of the repeatedly changing trends of global markets through developing market-oriented approaches (Page, 1995; Law, 2002; Palmer, 1998).

In order to mitigate such disadvantages, the contribution of private sector into destination planning and marketing is encouraged by local authorities through the provision of grants, loans and funds for specific projects. In fact, since local governments have difficulties in backing urban planning and marketing projects, many urban services have been privatised in developing countries (Goodwin, 1993). As Goodwin adds, the help required from private sector organisations in managing and marketing urban services and products becomes especially apparent when undertaking revitalisation programmes and creating new images for city destinations. Fierce competition between urban areas, changing political and economic ideologies of governments and technological developments accelerating both communication and transportation between distant locations all force urban service providers to benefit from the trained and skilled workforces of private sector and to operate effectively in a global market with a strong marketing power.

A leading tourism organisation, which is privately-owned is not structured any differently than a publicly-owned one (*see Appendix 2*). However, a private LTA would rely more on membership fees to finance its functioning and activities than regular and specific budget shares allocated by local and national governments. As Hinch and Slack (1997) note, a shifting balance of power from public sector ownership toward private sector management of tourism offices has been the trend in the USA for some time. States like Colorado, Virginia and Oregon have abolished their state tourism boards and privatised them with a higher degree of private funding. The authors explain the reasons for such a trend by concerns raised by local communities over high levels of public debt, the widespread emergence of a conservative ideology and the election of populist governments that reflect these views.

The government ideologies favouring a socialist vision in various countries may not allow tourism offices and bureaux to be established as private organisations. Still, another option to benefit from the skilled and experienced labour force of private sector has been discovered through contracting out certain marketing tasks to private agents. In such cases, while the marketing strategies and plans are prepared by the responsible government authorities, a contractor agent is appointed with undertaking some marketing tasks.

In Western countries including the USA and Britain, governments have also set up *'quasi-public'* agencies to undertake projects in urban areas (Law, 2002). While the primary task of such agencies has been usually to revive decaying urban districts through constructing new business districts, recreation areas and attractions, once reached certain phases of development, they also need to promote these revitalised areas to attract new residents, investors and visitors. To do that, they benefit from the funding generated from public grants and loans as well as membership fees. While they are responsible to the governments during the implementation of the project, they are usually replaced by another agency or organisation, which is more permanent and equipped with different responsibilities to market the area long-term. The Boston Redevelopment Authority, the Battery Park City Authority of New York and London Docklands Development Corporation are few examples of such quasi-public urban bodies (Beioley, 1981; Crilley, 1993).

Surely, the private sector organisations in city destinations are not limited with privately-owned tourism offices and contractors. In fact, the majority of sector stakeholders operate privately. In this research, however, the role played by two private sector representatives *-i.e. business interest groups and intermediaries-* in marketing city destinations will be reviewed briefly.

3.4.2.3.1. Business Organisations and Chamber of Commerce

Various economic sectors in urban areas are important determinants of the well-being of city destinations. Besides their economic benefits like the creation of employment opportunities for locals and generating new income sources for local governments, the variety of international business organisations, manufacturing companies and finance institutions result in the increase of business travellers to city destinations. At the same time, foundations, boards, associations and other business interest groups play an important role in determining employment, prices, inflation, production, growth and the material standard of living in urban areas. Therefore, both local and national governmental authorities are influenced by common opinions, beliefs and expectations of business interest groups in certain development policies. The representatives of such groups play an important role in bonding relations between public authorities and entrepreneurs and in lobbying for the interests of their groups in new development schemes, grants allocation and policy making (Hall and Jenkins, 1995).

Besides their indirect influence on marketing city destinations, some business interest groups may be equipped directly with the responsibility for marketing urban areas as trade, entertainment and education centres with the applications of re-imaging strategies. In many American cities, for example, the Chamber of Commerce plays an important role in promoting and encouraging economic development. Short et al. (1993) show how the Greater Syracuse Chamber of Commerce got involved in promoting Syracuse, New York whose marketing activities were broken down both into parts -*i.e. selling the city, coping with the industrial legacy and changing inner-city image factors*-, and into time periods in relation to the city image management. Although the marketing efforts of the Chamber have been mainly directed towards attracting new investments and entrepreneurs and not promoting the city as a tourist destination, it is a good example of the importance of trade boards and partnerships in ensuring the continued buoyancy of the local economy by leading various marketing activities including image building.

3.4.2.3.2. Tour Operators and Travel Agents

The role played by intermediary organisations in the distribution network of city marketing is briefly explained in Section 3.5.2. Since they are the organisations, which deal with visitors on a one-to-one basis, their importance in destination marketing is unquestionable. Since, the leading tourist authorities of city destinations are not keen on targeting various market segments by the use of expensive marketing tools, their marketing activities, in many cases, are directed at tour operators and travel agents who, then, try to influence the visitor decision-making process in favour of certain destinations (Gartrell, 1994; Law, 2002).

Besides the fact that intermediary organisations help city destinations to overcome the difficulty of reaching various market segments, as Laws (1995) notes, the significance of the package holiday concept in making travel opportunities affordable and readily available to large numbers of tourists should not be underestimated. Combining various destination offers in a single catalogue or in a single travel shop, puts destinations in more competition, as potential visitors are able to compare the product packages of competing city destinations with the help of the representative of an intermediary organisation. This is why many national, regional and local tourism marketing activities are programmed to convince both intermediary organisations and their clients of the benefits of the product package on offer. Laws (1995) identifies two forms of establishing a strong relationship with tour operators and travel agents for city destinations:

1) Strategic support is provided in the development of new areas or holiday concepts by providing introductions, influencing destination developments and legislative or financial policy and;
2) Tactical effort goes into providing support to staff on familiarisation trips, through promotional events and the production and distribution of technical sales support literature or computer databases.

3.4.3. Marketing Partnerships among Tourism Organisations in Cities

A leading tourist authority (LTA) of a city destination, therefore, concentrates its marketing efforts on promoting a product package by encouraging individual attractions to uniform their marketing messages sent to potential visitors to create a strong and coherent destination image. Individual tourism businesses, meanwhile, prefer to be involved in joined marketing activities in order to benefit from the tourism earnings of the destination equally and deservedly. Establishing marketing partnerships to strengthen the competitiveness of a city destination has, therefore, become a prevalent trend among sector stakeholders. While LTAs take the lead in establishing partnerships, alliances, associations and foundations by bringing attractions and service providers together, individual organisations form partnerships to achieve both economic and social goals. In fact, in their study, Hinch and Slack (1997) mention the recent shift of power and financial responsibility in partnerships from public toward private sector members. Whether they are led by private or public sector organisations, the common element of all sorts of partnerships is that member organisations volunteer to pool their resources –*i.e. labour, funding, information, etc.*- in order to accomplish collaborative goals.

In fact, the organisational disadvantages induced by the very characteristics of both the public and private sector, can be mitigated by pooling the resources of both sectors in partnerships. This urges private and public sector organisations to establish effective partnerships in both a qualitative and quantitative sense. Better flow of information, mobilisation of capital, effective management, flexibility in decision-making process, and defining social and environmental goals and aims as well as economic ones can all be achieved in public and private sector partnerships by mitigating the obstacles experienced by each sector (Krantz and Schatzl, 1997).

Long (1997, p.239) describes the concept of *'partnership'* with incorporating elements of the collaboration as:

> *"...the collaborative efforts of autonomous stakeholders from organisations in two or more sectors with interests in tourism development who engage in an interactive process using shared rules, norms and structures at an agreed organisational level and over a defined geographical area to act or decide on issues related to tourism development".*

As the description emphasises, tourism partnerships are developed within a defined geographical area, e.g. established by tourism organisations located in the major tourist zone of a city destination. Postma and Jenkins (1997) argue that such co-operation among tourism organisations in a geographically restricted area, is based on the notion of *'Tourism Opportunity Spectrum'* (TOS). Attractions and tourism organisations, which offer either similar or distinctive products and services to visitors, benefit from their strategic location in a tourist zone. Visitors drawn to a TOS, are a potential customers for all the products and services existing within the invisible boundaries of the tourist district. Thus, the collaboration between the tourism organisations helps to encourage visitors to participate in nearby attractions, and to keep them in the district by informing them about all possibilities.

Obviously, the use of such a geographical approach in defining partnerships cannot be restricted to tourist zones and districts of city destinations. The wider geographical scale and boundaries of a city destination can be defined clearly, too. Therefore, TOS can be regarded as the tourism sector of an overall urban mechanism, and partnerships to promote the city can be assessed within this geographical approach. Developing an image for the destination and uniting all sector stakeholders to promote this overall image with a well-established and accepted city identity may be one of the most experienced outcomes of such a city-based TOS. Furthermore, the geographically restricted area can be enlarged on a national and international scale to suggest partnerships between different city destinations and their sub-products.

Long (1997) identifies three types of partnership arrangements according to the nature of the issues to be addressed and the organisational level involved. These three types are:

i) ***Programmatic-*** These partnerships tend to be technical or operational and commonly involve a contractual relationship between a few partners. While the emphasis tends to be on products or outputs, the partnership is based on a short-term arrangement, which expires with the completion of a proposed project.

ii) *Federational-* The partnership comprises industry groupings and/or a regional coalition. The sweep is broader than that of the programmatic partnership but still limited by the bounded context in which the problem is defined. The partnership tends to adopt a proactive stance towards coalition building, issue identification and purpose formulation and in consequence is more complex arrangement than in programmatic partnerships.

iii) *Systematic-* The partnership is concerned with broad, system wide societal issues and is dominated by process rather than products. The emphasis is upon system benefits rather than gains for individual participants, and representation tends to come from senior managers and officials across participating sectors.

These three different forms of partnerships are mainly established according to the needs, wants and expectations of both the collaborating partners and the partnership area. In addition to the clarification of the time-span, geographical boundaries, number of members and objectives of a proposed collaboration among the stakeholders, determining the organisational structure of a marketing partnership which would be influenced by both '*internal*' *-i.e. the aim of the organisation, the resources available, etc.-* and '*external factors*' *-i.e. economic, political, social and environmental factors-*, is a difficult task.

The imitation of successful collaboration examples is not the solution. What may work in one city destination, may fail in another due to the differing characteristics of each tourist product package offered by competing destinations. The governance style of partnerships, the level of compatibility among member organisations and whether they are dominated or led by public sector or private sector organisations, may show significant polarities. Nevertheless, Palmer (1998) suggests that tightly governed partnerships characterised mainly by formal rules and conditions are perceived by their members to be more effective than loosely governed ones. The author adds that the effectiveness of a partnership highly depends on decisive leadership in achieving corporate objectives.

Whatever the type of a partnership, there are some common benefits of collaboration among tourism organisations. These can be listed as (Jamal and Getz, 1997; Palmer and Bejou, 1995; Fretter, 1993):

1) Partnerships foster better understanding of the needs of the stakeholders, the destination in general and visitors, and develop a sense of shared values. The co-operating bodies develop a vision to see beyond their own priorities and a strategic view point of the tourism development in their destination;

2) Partnerships increase the recognition of interdependence by the stakeholders of the sector. In fact, without local and strategic tourism planning produced by public sector, the future expectations and goals of private sector organisations are difficult to achieve;
3) By pooling efforts, organisations can achieve economies of scale. Through co-operative financing, risks can be shared and spread, and more capital sources can become available;
4) In marketing terms, partnerships can create more impact on potential visitors compared to promotional campaign of individual organisations. Potential visitors would find the united and coherent information about a destination more convincing than the confusing and divergent messages sent by various organisations;
5) Partnerships ease the information flow between different organisations of a tourism network and help resolving any conflict or opposition among various members of the sector.

Despite all these benefits, academics identify some obstacles to establishing partnerships including (Selin and Beason, 1991; Palmer and Bejou, 1995):

- competition between organisations forces them to exchange finite information especially on matters concerning market profile, sales records and future trends expected to shape new marketing activities;
- the fragmentation of responsibilities, differing ideologies and distinctive organisational aims make it difficult to convince individual organisations to unite their efforts to achieve corporate targets;
- managers who lack strategic vision to understand the benefits of partnerships, hesitate to take part;
- if member organisations do not establish a consensus on the responsibilities to be shared to serve partnership goals, this may harm the communication network and may result in organisations losing their belief in the effectiveness of collaboration. Thus, responsibilities should be allocated between partner organisations in a way that the leading organisation, which is equipped with the highest responsibility of establishing, implementing and achieving corporate goals, is respected by all organisations;
- partnerships established within a restricted area cannot isolate their member organisations from the rest of the business environment of the area. All organisations located in the area benefit from the marketing and development projects of the partnership. The organisations, which do not pay membership fees and still benefit from the functioning of the partnership, may cause friction for member organisations. Such a situation would disrupt the relationship and co-operation between the organisations, which are considered to be the components of a product package.

Surely the benefits of partnerships outweigh the above listed obstacles, which can be mitigated with a strategic and systematic approach throughout the establishment process of a partnership by the founder organisations. A set of evaluation guidelines can be drawn to strengthen the benefits of partnerships, while obstacles are eliminated. Jamal and Getz (1995) bring together such evaluation guidelines in a process, which evolves in three stages: problem-setting, direction-setting and implementation (*see Table 3.3*).

As shown in the table, partnerships first need to be formed around a common vision and strategy, and not simply fulfil the requirements of individual organisations. Unless consensus is established by member organisations on the aims of a partnership, pooling resources to serve shared needs would be impossible. As Long (1997) notes, partnerships should offer genuine opportunities to secure community participation. Such opportunities can only be activated by adapting the partnership aims to an overall tourism and urban systems and with optimal organisational structure and network relations. Thus, the goals and tasks of the partnership should be identified clearly and should be in line with the local, regional and even national development and marketing plans. Besides, the participating members should have confidence in the possibilities of achieving communal aims, goals and tasks with clearly defined partnership strategies.

Secondly, the roles and tasks that each partner is responsible for, should be identified clearly and justifiably. The contribution of organisations can only be achieved if members feel that the activities of the partnership would create added-value both to their businesses and to their business environment.

In addition to social, educational and environmental impacts of partnerships on the area, economic benefits for private sector members should be integrated into the partnership activities and tasks. Whatever the main task of a partnership is, its influence on the local area and the benefits for member organisations should be sustained through an on-going and coherent process, rather than the involvement of retrospective activities with short-term and ad-hoc outcomes. In order to fulfil partnership goals and aims, an exclusive communication network should be established among members and regular meetings should be organised to review and identify changing needs of both the partnership area and the members.

Finally, in order to strengthen co-operative relations between member organisations, a set of criteria should be identified in deciding which organisations are accepted as members, and which are rejected. Organisations, which run their business in the same sector and located within their close vicinity, are the initial candidates to become members. These organisations should volunteer to share risk, costs and profits to achieve common goals, and should not cause bottlenecks for other volunteers to participate in co-operation to facilitate the effective outcome achievement. The partnership, which brings such organisations together, should conduct education programmes on the interdependence of various stakeholders while allowing individual organisation to compete with each other locally to draw visitors.

Table 3.3. A Partnership Process for Tourism Planning

STAGES and PROPOSITIONS	*FACILITATING CONDITIONS*	*ACTIONS and STEPS*
Stage 1. **Problem-Setting**	➢ Recognition of interdependence ➢ Identification of a required number of stakeholders ➢ Perceptions of legitimacy among stakeholders ➢ Legitimate/skilled convenor ➢ Positive beliefs about outcomes ➢ Shared access power ➢ Mandate (external or internal) ➢ Adequate resources to convene and enable collaboration process	➢ Define purpose and domain ➢ Identify convenor ➢ Convene stakeholders ➢ Define problems/issues to resolve ➢ Identify and legitimise stakeholders ➢ Build commitment to collaborate by raising awareness of interdependence ➢ Balancing power differences ➢ Addressing stakeholder concerns ➢ Ensuring adequate resources available to allow collaboration to proceed with key stakeholders present
Stage 2. **Direction-Setting**	➢ Coincidence of values ➢ Dispersion of power among stakeholders	➢ Collect and share information ➢ Appreciate shared values, enhance perceived interdependence ➢ Ensure power distributed among stakeholders ➢ Establish rules and agenda for direction setting ➢ Organise subgroups if required ➢ List alternatives ➢ Discuss various options ➢ Select appropriate solutions ➢ Arrive at shared vision or plan/strategy through consensus
Stage 3. **Implementation**	➢ High degree of ongoing interdependence ➢ External mandates ➢ Redistribution of power ➢ Influencing the contextual environment	➢ Discuss means of implementing and monitoring solutions, shared vision, plan or strategy ➢ Select suitable structure for institutionalising process ➢ Assign goals and tasks ➢ Monitor ongoing progress and ensure compliance to collaboration decisions

Source: Jamal and Getz, (1995), p.190.

As Law (1990, p.13) emphasises, an *'enormous amount of good-will'* is required to produce comprehensive and effective policies. *'Trust'* established among the collaborating organisations is also vital, as partners are invited to volunteer to share their financial, managerial and competitive resources with their so-called competitors in the market geographically determined by the partnership (Palmer, 1998).

3.4.4. Funding Marketing Activities by Tourism Organisations

Heath and Wall (1992) list three different forms of financing destination marketing activities. In most cases, governments announce the budget allocations to be given to national tourism organisations who then, divide it between various local tourist authorities (LTA). LTAs are left with the public money given by higher tourism authorities and need to use it effectively to finance its various functions. Marketing, therefore, tends to get budget-oriented. This is called as an *'affordable method'*, which denotes marketing strategies and plans determined by the allocated public money. In short, LTAs are forced to get involved in the marketing campaigns that it can afford, and not the ones with high costs.

Another approach is to base promotion expenses on the expenditures of competitors, known as the *'competitive-parity method'*. The more appropriate and effective method, however, is when destination marketers can decide the amount of money needed for effective marketing. So called *'objective-and-task method'* suggests that the tourism organisation appointed to market a given city destination with such financial resources, needs to identify the destination-wide marketing strategies and to prepare marketing plans before budget shares are allocated to support different functions and activities.

In whatever form it is financed, marketing city destinations requires large sums of budget allocations to be spent. Surely, the amount of money spent on marketing activities depends on the marketing tools chosen and marketing campaigns run by city marketers. However, since potential visitor markets are so diverse and spread in geographical terms, effective and consistent marketing tends to involve long-term and systematic planning and, hence, requires consistent financial and managerial support from public and private organisations.

Private sector involvement in marketing activities hinges upon the consensus established with regard to communal marketing activities to be held by sector stakeholders. Thus, although private sector funding strengthens the effectiveness of marketing activities by enabling *'corporate image'* to reach larger amount of target markets, its consistency may be at risk in times of crisis and conflict emerged between various organisations. Therefore, especially in the cities where the main tourist authority is a public organisation, marketing activities can be turned into effective and strategic actions only if an appropriate amount of public money is spent on developing, planning and marketing tourist attractions and services. Joint financing and provision of public grants and funds for the use of private sector marketing and development activities may also be required according to the marketing strategies and plans drawn by the sector as a whole.

In fact, the recently emerged trend in the Western world suggests shifting power and responsibility to private sector from publicly-owned organisations, as governments force sector stakeholders to provide a larger share of financing destination promotion (Geerts, 2000). Bonham and Mak (1996) explain the need for more private funding by the opposition raised by taxpayers to funnelling large amounts of budget into promoting destinations which is perceived to benefit private companies, while the improvement of other urban services such as local transportation and housing is neglected.

While ideal city marketing suggests that city marketers should be equipped with financial and technical resources in order to effectuate their tasks and goals, empirical studies show that almost all of the leading tourist authorities in major city destinations suffer from a lack of financial support from both public and private organisations (Heath and Wall, 1992). The problem of insufficient financial resources limits the marketing aims and goals of these organisations. Limited budget allocation forces city marketers to rank their marketing strategies according to their priority importance, and to concentrate on achieving some marketing goals and to drop some others. However, emphasising on some tasks and ignoring others, may hamper the long-term development of city destinations, while the beneficial effects of funnelling large amount of funding into specific projects may be ad-hoc and temporary. As mentioned earlier, one of the recent remedies endorsed by many practitioners and academics to this problem is to join stakeholder efforts in marketing partnerships.

However, as Bonham and Mak (1996) emphasise, an obstacle in funding tourism destinations by joint-marketing activities is that non-participant organisations can take a *'free-ride'*. While member organisations provide fair shares to back marketing activities of a destination product package, the suppliers of other tourist products and services who do no participate in collective activities would still benefit from the positive effects. Since there is no way to force all organisations which benefit from the collective marketing activities, to provide a fair share of funding, the authors suggest, a number of state dedicated tax revenues collected from tourism organisations can be provided to associations. Taxes on hotel rooms, entertainment establishments, car rental companies, restaurants, transportation, attraction entrance fees and gambling can be shown as examples.

While taxes on different sub-industries may cause many firms and individuals to benefit from promotional expenditures without being subject to the tax, a broad-based and dedicated tourism tax applied to all types of tourism organisations may be a better solution to overcome the funding difficulties caused by free riding organisations. As the authors (p.3) further note;

> *"broad-based industry tourism promotion tax conforms to the benefit principle of taxation, reduces free riding, reduces/eliminates wasteful annual lobbying by the travel industry for legislative appropriations, and provides a more predictable source of revenues for destination promotion. However, as long as the collection mechanism is a government-imposed tax, it may not free the industry entirely from government intrusion or public opposition".*

3.5. Marketing Mix in City Tourism

The competitiveness of city destinations in the international tourist markets depends heavily on the efforts of the leading tourist authorities and major city marketers to create a marketing mix *-i.e. product, price, place (distribution) and promotion-*. While tourist organisations in a city destination would develop their own marketing mix, the leading tourist authority (LTA) plays an important role in guiding, directing and co-ordinating an overall marketing mix concerning the product package of the destination (Heath and Wall, 1992; Page and Hall, 2003). LTAs' co-ordinating and directing role in development of a marketing mix becomes especially clear with regard to *'place product'* and *'promotion'* components. In many cases, they are the main tourism organisations to promote the destination in international and domestic markets. Also, their extensive and large-scale marketing research help them to decide which resources and aspects of the city are to be included in the promotional campaigns as the components of the product package.

Thus, they mainly shape the product package and the components of destinations according to the needs, wants and expectations of potential and existing demand. With respect to price and distribution components of the marketing mix concept, however, the role of LTAs is rather regulatory and co-ordinating, as they do not have direct control on these aspects of a tourist product package. They may help tour operators and tourist attractions to gain mutual benefits by agreeing on an effective distribution network and, may monitor pricing strategies used by tourism organisations and those enforced by local and national governments, but their influence on these two later components of the marketing mix is not as strong as it is on the *'product'* and *'promotion'* components.

3.5.1. City Tourist Destinations as Marketable Products

The total product package of a city destination consists of neither tangible nor intangible sub-products, but a combination of both. In addition to the fact that it is not a single product but an augmented package, such a combination of intangible and tangible elements of city destinations not only make them incomparable with tangible manufactured goods, but also with those other individual tourist services and products. A city destination product package offers its visitors accommodation, catering facilities, attractions, transportation facilities, historic places and sites and also shopping activities (*see Chapter 2*).

While such sub-products also combine tangible and intangible elements within their own product offers, city destinations differ from their constituents according to certain image determinants like the hospitality of locals, security, cleanliness, vibrancy and crowding which are all difficult to identify and are associated with the total product offer. In fact, as Goodwin (1993) stresses, city destinations are not just physical or economic product offers, but are also social, cultural and political entities. Hence, in this research, while the product formulation and evolution process of city destinations are considered first, the very characteristic of city destinations that they are product clusters, is covered in Section 3.5.1.3.

3.5.1.1. City Tourism Product Formulation

The process of transforming cities into marketable commodities has, in many cases, not been the result of city marketers and urban planning authorities' efforts and activities, but the existing product offers of cities was established and induced by the attention of visitors, businesses and residents in certain urban locations, which has given the impetus to establish urban authorities and partnerships to approach marketing systematically. The tourist product package of a city is, therefore, shaped by the needs and expectations of demand, leaving city marketers to present the product package in a most effective way to strengthen the competitiveness of their city.

Heritage, for instance, is often the main component of a city tourist product package with a strong pull-in effect on potential visitors. Architecture, in the same way, reflects the identity of a city and helps form the image of a city depending on the unique characteristics of its buildings, facades, streets, skyscrapers and monuments (Getz, 1998). Such components of product offers cannot be created in a short period of time, and are the endowments of the past inherited by today's generation. In the same way, climate, geography, topography, culture and traditions are all inherited components of a city product package (Jefferson, 1990). Tourist accommodation, attractions and services emerging around such historic buildings, monuments and museums, create product packages circumstantially without the need to prepare feasibility plans prior to the product formulation process to extrapolate whether the product on offer will be successful in the markets or not. City marketers and planning authorities, hence, benefit from the *'ready-made core elements'* of their tourist product, while they have control over the manifestation of tourism in the city and the methods to market the existing product package.

In other words, the product package formulation for city destinations is a complex process. McKercher (1995) compares this process with a reverse relationship to traditional (tangible) products and their market. In tourist destinations, in contrast to tangible products, city marketers do not benefit financially from the success of their cities in attracting large numbers of visitors. Also, they have less control over the product mix and its improvement and, the development of new attractions, services and amenities. As a result, their effort becomes to find market segments, which best fit the overall product package, rather than developing new products.

McKercher adds that such a characteristic of city destinations requires a market portfolio to be developed by city marketers rather than a product portfolio to be placed at the centre of marketing activities. In contrast to the product portfolio approach, managing the market portfolio of a city destination prohibits city marketers from offering something new each time they fail in their marketing efforts to attract particular market segments. In such failures, the rather inflexible product package of the city destination forces city marketers to find new markets to sell the product package to. For many traditional products, on the other hand, managing a product portfolio enables producers and marketers to replace the diminishing products of the market with new ones to suit changing needs and wants.

Haywood (1997) argues that concentrating the marketing activities of city destinations on the basis of a market portfolio has its bottlenecks. In order to attract more visitors, city destinations try to improve their communication networks with potential markets, but often overlook the need to develop, improve and design their tourist product package. Surely, the fabrication of a new urban tourist product augmented with the newly created core and secondary elements is out of the question. However, presenting the urban environment in a more attractive way can be achieved. The author adds that without a coherent and long-term tourism development plans insisting on the increase of visitor numbers in the market strategies, would hamper the sustainable development of the tourism sector in a city. Thus, improvements to urban design, new attraction developments, infrastructure, urban environment and local communities' attachment to the sector become vital components of a city tourist product package, if it is to be marketed effectively as a commodity.

Another important issue to be taken into account when presenting a city tourist product package is the quality of its components which clearly have a direct effect on the quality of the overall package and the urban environment. As described in Section 2.6, the product packages of city destinations consist of core, secondary and additional elements. When marketing cities, these elements are brought together within the same package offer. Clearly, the landmarks and the main image constituents of a given city play a dominant role in presenting the city as a tourist destination to visitor markets.

With regard to the importance of core elements for a city tourist destination, Ashworth and Voogd (1994) describe three different approaches to be considered by city marketers:

1) Core elements offering poor services with a favourable image require product improvement. Marketing such elements without improving their quality would cause disappointment among visitors. The authors suggest that short-term de-marketing may help the destination to divert visitors to other destinations until efforts in product improvement are made.
2) An existing favourable image of the destination and its supply components combined with good facilities hardly requires marketing and promotional effort. The main task of city marketers and urban authorities should be to manage the sector sustainably and to keep track of the trends occurring in the market to update their marketing strategies.
3) Finally, a set of appropriate product components offering quality service with an undeservedly poor or non-existent image requires marketing either to correct the former or create the latter. In this case, city marketers should be involved in exclusive marketing activities and should co-operate with sector stakeholders to strengthen the communication network between the product package of the city and its potential and existing market segments.

To conclude, as discussed in Chapter 2, visitors are the manufacturers of a city tourist product package and play an important role in its formulation process. Studying visitor movements, experiences and satisfaction in city destinations, therefore, provides hints on the product package demanded and on its most-desired components. Thus, the product formulation process should be examined from the viewpoint of '*consumer orientation*' and, should strengthen the interdependency of individual tourist products and services in order to enhance the overall competitiveness of the city destination (Heath and Wall, 1992; Melian-Gonzales and Garcia-Falcon, 2003).

3.5.1.2. The Life Cycle of City Tourist Products

Life cycle analysis, which investigates marketable products according to their evolution process and market growth represented by the change in customer numbers, is one of the mostly used and accepted techniques in the marketing academia. Implementation of the analysis is based on long-term changes occurring in destinations and the effects of these changes on the strategies for land use, economic development and marketing (Getz, 1992). Although the analysis was initially adapted to the traditional destinations by tourism researchers, examples of the life cycle analysis of city destinations do exist in the literature (Van Den Berg et. al., 1995; Grabler, 1997; Stansfield, 1978; Van Der Borg, 1991), albeit with differences from the standard S-shaped pattern of the analysis due mainly to the complex nature of city tourist product packages.

According to the original analysis of *'Tourism Area Life Cycle'*, destinations evolve through the stages of exploration, involvement, development, consolidation, stagnation and decline or rejuvenation (Butler, 1980). Theoretically, each stage has distinct market characteristics, hence requiring different marketing strategies and tools. For example, at the first stage of initial destination development, which is characterised by the development, or the discovery of tourist attractions, destination marketers put their efforts into informing potential visitors by using available marketing tools to create a swift and extensive public knowledge. They may be involved in so-called *'aggressive marketing'* to accelerate the evolution of this process.

On the other hand, if the authorities of a developing destination aim to limit visitor numbers to protect and conserve their environment, they may also focus on information transmission to certain target markets by the application of finite public relation and sales marketing techniques. In any case, the existing research proves that the tourists who choose destinations at the exploration phase of their life cycle, tend to be, adventurous, skilled, high-income earners and first-time visitors in small numbers (Grabler, 1997; Cooper, 1992). In fact, the main concept of the life cycle analysis and its relation to destination marketing strategies revolves around the characteristics, needs and wants of potential and existing visitors and how different stages mean attracting different visitor types and developing varied tourism forms.

The marketing strategies drawn at the consolidation phase, which is indicated by the increase in visitor arrivals to the destination, may lead to mass tourism. At this stage, large numbers of visitors are attracted by an expanded product cluster, as the improvement of infrastructure facilities is supported by public funds. Thus, marketers switch their efforts from informing visitors on the destination to persuading more of them to purchase the product package in their place of residence. These strategies cannot be similar to those in the decline phase, which is characterised by deterred quality of tourist products and services in a destination due to the surpassed capacity thresholds. This stage may require product improvement, new attraction development and radical changes in the marketing aims and goals to find new market segments to attract. Otherwise, the deteriorated destination image may lead visitors to prefer competitors or emerging destinations, while the destination in the decline stage suffers from decreases in visitor numbers and tourism income. The detailed characteristics of each stage in reference to marketing and development tourism destinations are suggested by Cooper (1997) as shown below in Table 3.4.

Table 3.4. Implication of the Tourist Area Life Cycle

	Involvement	*Development*	*Consolidation*	*Decline*
Characteristics				
Visitor Numbers	Low	Fast Growth	Slow Growth	Negative Growth
Private Sector Profit	Negligible	Peak Levels	Levelling	Declining
Cash Flow	Negative	Moderate	High	Declining
Visitors	Innovative/ Allocentric	Mass market (Innovators)	Mass market (Followers)	Laggards/ Psychocentric
Competitors	Few	Growing	Many rivals	Fewer rivals
Responses				
Strategic Focus	Expand Market	Market Penetration	Defend share	Reposition
Marketing Expenditures	Growing	High (declining %)	Falling	Consolidate
Marketing Emphasis	Build awareness/ educate	Build preference/ Inform	Brand loyalty	Protect loyalty/ Seek new markets
Distribution	Independent	Travel Trade	Travel Trade	Travel Trade
Price	High	Lower	Low	Lowest
Product	Basic/ Unstandardised	Improved/ Standardised	Differentiated	Changing
Promotion	None	Personal selling/ Advertising/ PR	Personal selling/ advertising/ PR/ sales promotion	Personal selling/ advertising/ PR/ sales promotion

Source: Cooper, (1997), p.87.

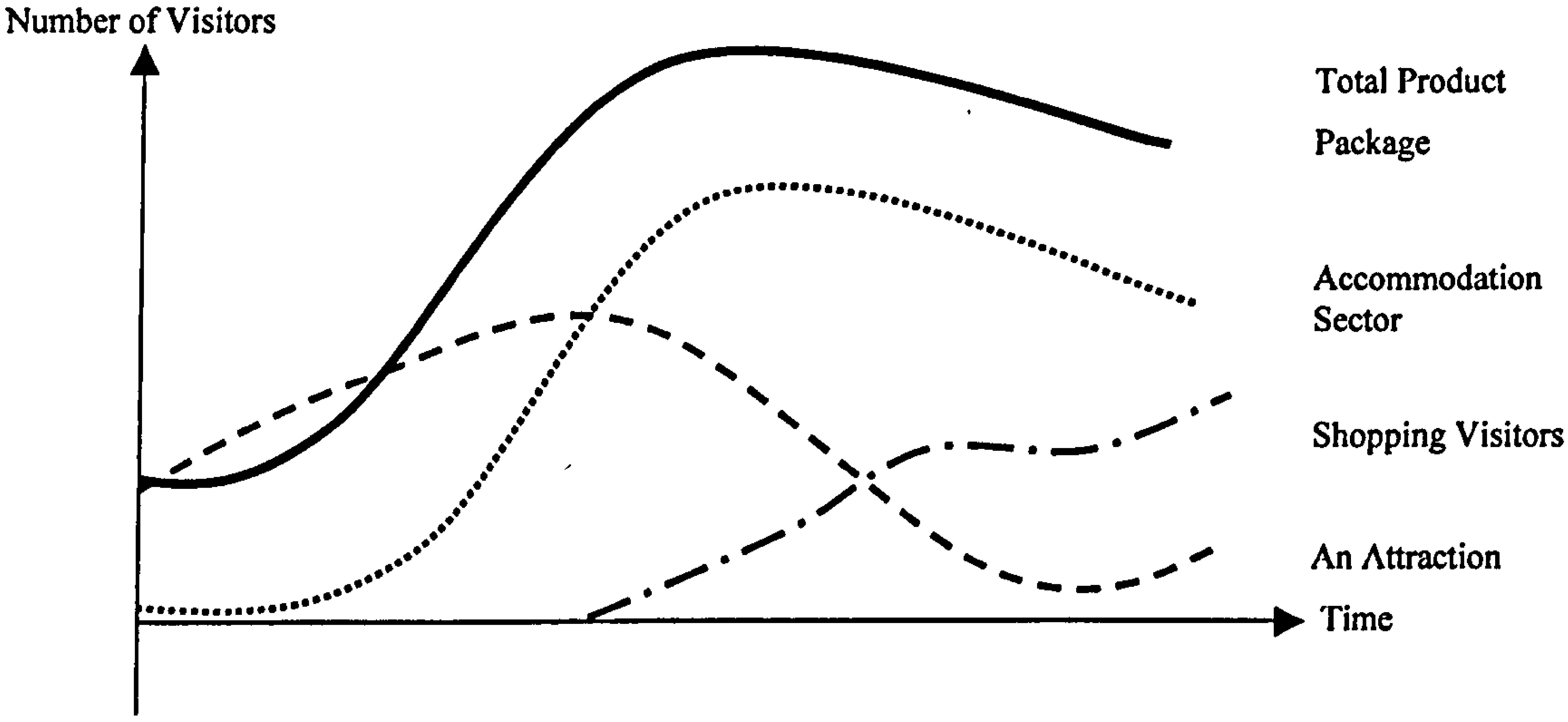
Grabler (1997) presents some empirical cases, which suggest that the competition for a city destination in the early stages of its life cycle is not as fierce as it may be during the stages of maturity and stagnation. While the city progresses in its life cycle with an increase in visitor numbers, its competitors increase, presenting tougher competition especially at the stagnation stage. While the fierce competition forces destinations to prepare strategic marketing plans and to be involved in exclusive marketing activities toward the decline stage, city marketers tend to consider reductions in the price levels of tourist products and further improvements of their product packages such as introducing new attractions to attract new market segments.

Life cycle analysis is a good measuring gadget for city marketers to extrapolate the future growth of a given destination with reference to its previous visitor records and its comparison of the life cycle analyses of other destinations (Lundtorp and Wanhill, 2001). However, life cycle forecasts cannot be definite, but informative. Besides the analysis is affected by many factors other than just tourism-based visitor arrivals such as the rate of tourism development, the ease of access, government policy, new technological developments influencing travel decisions, demographic characteristics of both the destination and its visitor markets, the marketing strategies pursued by competitors and the levels of competition among city destinations. Such external and internal factors affecting the expansion of tourism in a destination would make the prognosis for future visitor arrivals more difficult.

Cooper and Jackson (1989) add that the difficulties in identifying stages with their turning points and collecting long-term statistical data also limit the utilisation and validation of life cycle analysis. Moreover, as Butler (1980) emphasised, in comparison to tangible products, destinations can only be regarded as dynamic product clusters, which evolve over time, hence complicating the analysis of their life cycle patterns. Due to such difficulties in forecasting visitor numbers, defining stages and confirming the analysis through empirical validation, the life cycle analysis cannot be used as a strategic marketing tool or as a *'predictor'* of what will happen in the future, but an informative one which helps to describe the pattern of visitor flows to a particular destination through time (Di Benedetto and Bojanic, 1993).

When a city destination is subject to the life cycle analysis, the product package on offer is usually taken as *'the unit of analysis'* and is put under a microscope (Getz, 1993). To do that, the overall tourism statistics, which provide insights into how effective and profitable the tourism sector in the city is, are often used. No doubt such an analysis of the tourism sector is useful for city marketers to decide on which marketing strategies to be used. However, for more effective analysis, the product package should be split into its components, and the life cycles of each individual tourist products should be examined. Moreover, the sub-industries of the sector such as the accommodation, transportation and conference tourism industries should be considered both individually and as components of the product package. Identifying the stages that each sector and product is at in their life cycle, helps city marketers to develop operational, effective and applicable marketing strategies. Such a sequential life cycle analysis of city destinations is shown in Figure 3.2. Similar sequential life cycle analyses of a city destination can also be formed by separating various market segments and also by investigating different tourist zones of a destination.

Figure 3.2. Sequential Life Cycle Analysis of City Destinations



Source: Based on Heath and Wall (1992).

To conclude, life cycle analyses are an important instrument in analysing the market position and visitor profile of city destinations, but stand as a descriptive tool in marketing strategy development process. While comparing the life cycle analyses of competing destinations may not provide definite facts with regard to the relative competitiveness of individual city destinations, relying solely on the analysis as a forecasting tool to envision future visitor numbers to a destination may be misleading. Hence, as Choy (1992) notes, the analysis of city destinations should be contemplated individually. External and internal determinants for the manifestation of the tourism networks in city destination should not be burdened by local matters, but should cover the national and international key players on a global tourism network, as they, too, have an important and influential role in structuring life cycle patterns of various destinations.

3.5.1.3. Marketing Product Clusters of City Destinations

The priority in destination marketing is given to the transmission of destination-based information to potential visitors, rather than informing them about a single tourist product. That is because various products representing different aspects of the urban environment and belonging to different sub-industries of the sector are brought together in a product package by city marketers. Therefore, combined efforts of tourism organisations would not only enhance the competitiveness of the destination in visitor markets, but would also increase the profitability of the individual products and services providing that the marketing activities succeed to secure a desirable increase in visitor numbers. So-called *'co-operative marketing'* of city destinations requires consistent planning, research, decision-making and monitoring the market profile of a product cluster by all the concerned organisations and communities of the tourism sector.

As O'Leary and Dottavio (1980, p.161) list, the recognition of clusters provides some empirical benefits:

1) Product clusters provide planners and administrators with simplified and reduced groupings of activities, thus enabling them to concentrate their efforts on more practical, comprehensive categories;
2) Product clusters aid in the recognition of underlying determinant variables of leisure behaviour by collapsing innumerable activities to a manageable few;
3) There are more stable planning units than are individual activities and;
4) They offer planners a means of possibly providing equally satisfactory substitute activities when limited by financial and physical constraints.

3.5.2. Distribution Channels: Marketing Cities through Tour Operators

Distribution channels for a city destination can be explained as a network linking tourists with a product package on offer. While tourists and the product package are placed at opposite ends of this network, intermediary organisations contribute to the network in bringing them together. Since a city destination is not a tangible product, which can be delivered to the location of potential visitors, the main task of intermediary organisations is to inform potential visitors of various offers of tourist destinations and to sell a holiday, which suits their expectations, needs and wants.

Although the major intermediaries for tourist destinations are travel agents and tour operators, there are other organisations like hotel representatives in different localities, airline companies, conference planners and international tourist offices of destinations, which mainly provide information services to influence holiday decisions of potential visitors in favour of their destination product package. However, since the influence of tour operators, especially in building mass tourism, is more noticeable than the effects of other organisations, which mainly try to win business for their individual organisations, marketing city destinations through tour operators is dealt with in this section briefly.

Tour operators provide benefits both for destinations and visitors. Visitors have the advantage of booking their holidays by comparing various offers of destinations. Already packaged product offers also save them time rather than purchasing varied products and combining them in their own package. Visitors may purchase more services and products than the package includes on their arrival in a destination, but, in order to minimise the risk of travelling into an unknown destination, visitors prefer to book some core and secondary products of a package like accommodation, entrance to museums and travel to the destination through tour operators.

The benefits that destinations gain by using tour operators to link their product package with potential visitors can be listed as follows (Laws, 1995; Faulkner et al., 1999):

- Tour operators bring a regular flow of visitors to destinations and make travel opportunities affordable and readily available to large numbers of tourists;
- They overcome the difficulty destinations face of reaching out the varied and diffuse markets from which their visitors come;
- Tour operators ease the efforts of city marketers to create or enhance a single, positive and consistent destination image. As destinations are presented as product packages in the promotional literature of tour operators, their emphasis tends to be on destination images rather than the images of individual tourist attractions and;
- Tour operators reflect the views of various market segments, as they are in regular contact with various potential visitors who are in the process of making travel decisions. Thus, tour operators can provide important feedback to destinations on the needs, expectations and wants of both potential and existing visitors, which is collected both during the process of decision-making and after the actual holiday takes place in a particular destination.

However, as Laws (1995) emphasises, tour operators who make numerous destination offers available to potential visitors under the same roof, induce competition between the destinations to attract similar market segments. Their distinctive influence on visitors during their holiday-decision making process forces destinations to represent their offers to provide economic gain both for the tour operator selling the product package and for the organisations which sell their individual offers within this package.

That is why the leading tourist authority (LTA) of a city destination and individual organisations should maintain their relationship with major tour operators on a strong and on-going basis. Informing tour operators about new tourism developments, changes in tourism policies of local governments, special sports and cultural events and international conferences is, therefore, important to make tour operators feel attached to the destination. In order to further strengthen the relationship between these intermediary organisations and the destination, city marketers usually organise familiarisation trips for the representatives of well-established tour operators and distribute promotional materials to their branches.

3.5.3. Pricing City Tourism Products

Price is one of the major determinants of product competitiveness. The relationship between a customer and a producer relies on the exchange of a product and the price paid for it. In an ideal market environment, potential customers should be able to compare prices of different products and to make their choice freely. In destination marketing, the price of a destination is a sum total of the prices of various products. Therefore, especially in the case of directing marketing activities toward attracting groups, the pricing mechanism is usually controlled by tour operators. The tourist authority of a destination, as the leading marketer, on the other hand, is not able to define the price of the product package, but may control and monitor the prices of sub-products through its regulatory tasks and governmental responsibilities.

When determining pricing strategies of a product package, which is marketed by city marketers, the other marketing mix components should be considered together with the overall price of the package. The place of the destination in the competitive visitor market, the effective utilisation of distribution channels and, the marketing activities of tourism organisations all influence the pricing strategies outlined by urban planners and marketers. Besides, the collaboration between sector stakeholders is inevitable to accomplish consistency between prices of various tourist products and services in the package.

The target market segments play an important role in the process of price formulation projected either by tour operators or by urban planners and marketers. This can be explained by the destination life cycle process. If a city has recently been involved in tourism planning and has been discovering its tourism resources, it is at the stage of *'introduction'* or *'growth'*. At such stages of the cycle, urban planners and tourism organisations may keep prices low to build a consequential tourism flow to their destination and to attract as many visitors as possible. However, at the later stages of the cycle, saturated tourism flows may force planners and marketers to concentrate on certain visitor markets and to increase the price of the product package to discourage drifters and day-trippers from visiting the destination.

Pricing is clearly associated with the cost of a destination product. Heath and Wall (1992) split the cost of a tourist destination for visitors into three groups: *'effort costs'*, *'time costs'* and *'psychological costs'*. This categorisation suggests that potential tourists do not only evaluate and compare different destinations according to their catalogue prices or the prices of individual attractions existing in their package. They also consider the time costs of destinations, explained as the costs of travelling. This cost does not only refer to the cost of a plane seat, but also includes the effects of anticipated tiredness, boredom and lost time for potential visitors when considering long distance travel. Besides, since visitors only have a limited period of time in a year to travel, an unpleasant holiday experience would mean ineffective use of their holiday time, hence an increase in the time cost of the destination.

The authors explain the psychological costs of a destination as the uncertainty the tourist experiences if the destination and its offerings are unknown. The price paid prior to travelling to a destination may make visitors fear the failure of a destination to fulfil their needs, wants and expectations. Hence, a visitor values the recommendations of their friends and relatives who have travelled to some of the destinations the visitor would like to visit. This is why popular city destinations attract more visitors than new destinations regardless the remarkable price differences between them.

With regard to the cost of a city destination, one important issue to be noted is the relationship between the quality of the destination and the overall price of its product package. It is a well-known fact that potential visitors, especially educated and high-income earners, do not mind paying more to use services and to purchase products in a city destination, if they are convinced about high standards of quality. From this perspective, city destinations clearly benefit from their exclusive range of tourist products in their package, which offers something for every holiday budget.

The cost of a city destination is also affected by certain periods of the year, which attract relatively more visitors than the *'off-peak seasons'*. Although visitors to city destinations do not show distinctive fluctuations in different quarters of the year, they reach peak numbers of visitors in summer months and during the Christmas holiday. It is not surprising, therefore, that the prices of any destination increase in peak seasons and decrease to attract more visitors during the low seasons. In addition to the pricing strategies of private sector organisations to attract more visitors in off-peak seasons, public authorities may introduce discounts on public transportation and on entrance fees to public museums (WTO, 1994).

Another approach to the costs of tourism in city destinations is the negative effects of the sector on the urban economy, the environment and its residents, and the costs paid to compensate such negative effects. As Van der Borg and Costa (1993) note, uncontrolled growth of visitor numbers result in transcended capacity limits of a given destination and forces urban tourism planners and marketers to act urgently to mitigate the negative effects of tourism before locals oppose new tourism developments and visitors leave the destination unsatisfied. The authors list three sources of costs induced by increasing visitor numbers on the physical and cultural urban environments:

(1) Public expenditure for facilities, attractions and other infrastructure, that are not directly destined for the visitor market, such as public transport and waste disposal. Tourism makes intensive use of such facilities, but contributes only marginally to their costs;

(2) The induced costs, the direct result of excessive pressure on a tourism attraction. Congestion and pollution are the most obvious symptoms of stress, although they are translatable in economic (monetary) terms with difficulty, and;

(3) The principal costs which tourism facilitates in a given city with its long-term effects on the performance of overall urban functions. Popular tourist zones and districts cause competition between economic sectors to be in the heart of the city, which, as a result, provokes high land rents in central districts.

3.5.4. Promoting City Tourist Destinations

As Krantz and Schatzl (1997) note, the major aim of promotional efforts is to position a city destination in potential and existing visitor markets where it has the potential to achieve the desired objectives outlined in marketing policies. Promotion is, therefore, an attempt to convince such visitors to purchase either the overall product package of the city, or its components, by presenting the city as able to satisfy the needs, wants and expectations of those target markets. The promotional information regarding a city destination can be transmitted to target segments at the four different phases of the travel-decision-making process. Promotional information is sent by city marketers (Braunlich et al. 1995):

(a) prior to the travel-decision-making process is finalised;
(b) after the travel decision has been made and before actual travel takes place;
(c) during the actual visit to the destination and finally;
(d) on completion of the travel to stimulate repeat visits.

In any of the above phases, city marketers can benefit from different communication methods to promote their destinations. Destination marketers should be able to create the most effective and appropriate promotional mix combining various communication methods befitting the characteristics of the destination package marketed. Heath and Wall (1992) list some broad criteria to be considered when developing and evaluating promotion mix strategies as follows:

- Promotion should be co-ordinated. Rather than depending on one form of promotion, city destination marketers should work in collaboration with the stakeholders to benefit from a thoroughly planned combination of marketing tools;
- When promoting an overall city tourist product package through more than one component

of a promotion mix, city marketers should be careful to concentrate on certain aspects of the package to be covered by all methods in order to increase the recognition and awareness of the message sent by each communication method;

- Promotion should be authentic. Deception will soon be discovered by tourists and, thus, will create resentment, and;
- The promotion mix used by city marketers should be complemented by other marketing mix elements in order to ensure successful and achievable tourism functioning in the city.

Prior to the identification of marketing tools to promote a city destination, supply and demand analyses should be conducted to examine the strong and weak points of the city, the accessibility of the destination to target segments should be enhanced with the establishment of extensive distribution networks and, marketing strategies including the pricing and positioning of the destination should be determined with a consensus achieved by sector stakeholders. Unless such prerequisites are accomplished, promotion activities would be uncoordinated, less influential on the decision making process of visitors and wasteful in terms of financial and managerial inputs provided by the concerned city marketers.

3.5.4.1. Marketing Tools for Promoting Cities

Ward (1998) stresses how marketing tools used by cities have changed through the process of marketing places as work and living in the initial examples of place selling in the Western world, and more contemporarily, through the process of marketing cities as vibrant entertainment centres. Videos, CD-ROMS, internet and colourful brochures with impressive graphics have replaced printed material featuring manufacturing imagery with factory chimneys. Indeed, in order to place their city on *'the map of international tourism'*, city marketers search for the most adequate ways to promote their cities. Marketing tools are used: to familiarise potential visitors with a particular destination; to influence their holiday-taking decisions in favour of the destination; to inform them about the products and services offered prior to their journey and also during their journey, and finally; to encourage them to come back to the destination in the future and to make each of them *'voluntary marketers'* of the destination who would spread their experiences to friends and relatives.

Despite the fact that almost all the local tourist authorities of the major city destinations suffer from a lack of funding for promotional campaigns, the increasing interest of governments, partnerships and private organisations in marketing have resulted in the search for new ways to promote destinations to increase their competitiveness in a fierce market. Without clarifying the techniques used by different destination types, the WTO reports (1993 and 1994) list the most commonly used promotional techniques by member countries as follows:

- Preparing printed material such as brochures, posters, maps, postcards and travel agent manuals, and distributing these to travel agents, tour operators and the tourist consumers;
- Preparing audio-visual material *–i.e. slide, film and video shows-* for use in travel seminars and other types of presentations;
- Advertising in newspapers and magazines, and in travel trade publication aimed at tour operators. For targeted promotion, special interest type publications are important for advertising;
- Advertising on radio and television, which can be expensive but often effective for mass marketing;
- Attending travel trade fairs;
- Undertaking special promotional trips to the market countries in order to contract travel agents and tour operators, which can also be expensive;
- Inviting and hosting visits by tour operators and travel writers and photographers. This can be an effective inexpensive technique for either mass or selective marketing, depending on the tour operators and publications involved, and;
- Preparing and publishing guides and general information books about the area, if these are not available commercially. These books can be sold to recover the costs involved.

Jansen-Verbeke (1985) notes that the usage of the above listed techniques is just a part of promoting city destinations. In addition to such promotion techniques, product improvement and staff training also count as promotional activities. The improvement of the product can range from designing an urban environment with new signboards, lighting and pedestrianisation to building new accommodation outlets and development of new attractions. When combined with the recruitment of promotional techniques, product improvement and staff training complete the process of informing potential and existing visitors on the products on offer in a particular city. This way enhancing the experience quality of visitors can be achieved, which, in turn, will have cumulative effects on the promotion efforts with the influence of word-of-mouth publicity, which is regarded as one of the most reliable and influential ways of influencing visitor attitudes, perceptions and beliefs about a particular destination, hence should be considered by city marketers (Morgan and Pritchard, 1998).

While individual cities concentrate on different marketing tools according to their current marketing strategies, it would not be inappropriate to suggest that major city destinations use almost all of the above listed techniques. Leading city destinations like London, Paris and New York attend travel trade fairs with their own display stands. They publish and distribute printed materials and organise special promotion trips as well as inviting tour operators and travel writers to experience their product offers. They sponsor or organise special events like sports competitions and art festivals, which help strengthen their image (Hopper, 2002).

Not only tourist organisations, but also business partnerships run separate promotional campaigns to market cities as trade centres. Promotional campaigns, which concentrate on business and trade aspects of a city destination, however, provide information on the attractions and recreational opportunities offered in the city to present it as a vibrant urban area with high levels of living quality. The trouble with the marketing tools used by the leading tourist authorities and individual tourism organisations in city destinations, is that their finite marketing budgets make it impossible to use certain tools coherently and on a long-term basis, since some methods like media advertising are too costly.

Still, there are some other ways of promoting city destinations, which can be '*cost free*'. Among such free marketing tools, Morgan and Prichard (1998) mention two: television and cinema movies taking place in cities and famous persona associated with certain localities. As popular TV series and most recent movies can help raise the image of a destination, city marketers now target well-established film studios and film producers, which, as a result, enable them to reach wider potential visitor markets. Famous persona, meantime, can also attract viewers and their fans attention to the cities with which they are associated strongly -*i.e. their place of birth, their residence and even, their place of death especially if tragic*-.

3.5.4.2. Marketing Campaign: Their Importance for Cities

Marketing campaigns are, in essence, the use of a combination of different promotion techniques concentrating on the same communication themes and messages to promote a particular destination in its target markets. In a marketing campaign, therefore, various techniques support each other in transmitting information and become substitute for each other. Until today, the most famous marketing campaign run by a city destination was developed by the State of New York and included the slogan 'I ♥ New York', which is still widely recognised by many people around the world. The aggressive and consistent marketing efforts of New York were copied by many other cities in the USA with a minor change replacing the name of the city in the slogan, albeit without the success of similar recognition and acceptance ratios. McCleary (1987) argues that the success of the 'I ♥ New York' campaign was not only related to the fact that the slogan was creative and innovative when it was first founded, but it was also supported by co-ordinated, comprehensive tourism marketing plans and the extensive use of the slogan in various forms of promotion techniques.

3.5.4.3. Advertising and Public Relations

Cooper et.al. (1993, p.259) call advertising as;

> *"any paid form of non-personal communication through the media about a product that has an identified sponsor. The media may include travel guides, newspapers, magazines, radio, television, direct mail and billboards. Advertising is used to achieve a whole range of objectives which may include changing attitudes or building image as well as achieving sales".*

Advertising is, in many cases, cheaper than distributing and printing large numbers of written material or than inviting the representatives of intermediary organisations on familiarisation trips with expenses are paid by destinations. The possibility of reaching market segments, which are not necessarily targeted by marketers with the use of other promotional techniques, make advertising an effective form of presenting a tourist destination to high volume of potential recipients.

Public relation, meantime, is defined as the planned and systematic attempt to build up mutual understanding and trust between an institution and the public (Krantz and Schatzl, 1997). While both public relation and advertising activities can be run by a leading tourist authority of a city destination, the use of private sector marketing agencies have become quite common in destination marketing. For instance, following the achievement of the title *'European City of Culture'* in 1990, Glasgow contracted out advertising and public relation activities to the international marketing company Saatchi and Saatchi, in order to build up an awareness of the new concept in the imaging strategies of the city as a culture centre (Ward, 1998).

3.5.4.4. Sales Promotion and Merchandising

In general terms, sales promotion can be specified as the promotion activities, which offer incentives to induce a desired result from potential customers, intermediary organisations or the sales force of the product (Cooper et al., 1993). Free offers and gifts provided either on condition of purchasing a particular product or without any restrictions on consumers to obtain the gifts, are the most common examples of sales promotion techniques.

In the field of tourism, a range of sales promotion techniques applied to visitors, intermediaries and the sales force of a given product include (Middleton, 2001):

- *Visitor segments*: price-cuts/sale offers, discount vouchers/coupons, disguised price-cuts, extra product, additional services, free gifts, competitions, passport schemes for regular customers, prize draws;

- *Distribution networks*: extra commission and over-rides, prize draws, competitions, free gifts, parties/receptions;
- *Sales force*: bonuses and other money/incentives, gift incentives, travel incentives, prize draws.

With regard to destination marketing, sales promotion techniques would include free '*familiarisation tours*' for tour operators, travel agents and travel writers. While participants of a tour are often invited on a complimentary basis to explore a particular destination, the benefit gained by the destination is that it fulfils an objective, namely relatively more credential media coverage of its product package than paid advertisement provided by the destination marketers. Tours organised for intermediary organisations, meantime, may lead to increased recommendations and bookings of visitors to the destination, while both techniques, if organised successfully, may strengthen the image of the destination both in the minds of tour attendants, and also in the minds of their customers and readers.

'*Sales blitz*' and '*free entrance tickets and vouchers*' to attractions are other techniques in destination marketing. Similar to familiarisation tours, a sales blitz aims to bring suppliers and marketers of a destination product package together with intermediary organisations and the sales force. However, in the form of a sales blitz, rather than inviting key personnel to experience the tourist product package in the destination, the representatives of destination marketing organisations travel to the locations, which have the potential to generate visitors. Attendance at '*travel fairs and markets*' by destinations is, also, one of the most popular sales promotion techniques, which help destinations to be presented to almost all players of the tourism distribution network *-i.e. individual visitors, intermediary organisations, individual tourist product suppliers and destination-wide marketers-* (Perdue and Pitegoff, 1990).

In contrast to sales promotion, where information and incentives are offered free of charge to target segments, merchandising involves materials, which are used in travel agents or in-house to induce further purchasing (Cooper et al., 1993). Souvenirs sold in visitor centres including mugs, T-shirts, hats, umbrellas, pens, notebooks and bags on which logos, slogans and pictures of landmarks are placed, can be counted as merchandising material used by city destinations. As Ward (1998) notes, Cleveland, for instance, has used recordings of the Cleveland Symphony Orchestra and bumper stickers and 'I ♥ Cleveland' mugs as marketing tools in its image strengthening strategies. Similar techniques are used by many cities to associate their cities with major international events, e.g. mascots designed to associate each Olympic Games event with the host city.

3.5.4.5. Brochures and Other Printed Materials

Brochures and other printed material like maps, posters, travel planners, accommodation guides and leaflets about special events and tour packages have been the most often used marketing tools since the early days of '*place selling*' (Ward, 1998). Their importance in the field of destination marketing has not been diminished by the introduction of other marketing tools, but has been enhanced by the ease of identifying various market segments and the need to provide relevant information on each segment. Besides, their substitute role to support the use of other marketing tools within a marketing campaign is widely utilised especially during the process of image creation by destination marketers (Morgan and Pritchard, 1998).

Although the distribution of written material to individual segments may create large sums of production expenses in marketing budgets, their importance in representing tourist products and services is most evident in the field of destination marketing, as visitors in remote places cannot test, sample or experience intangible products from their place of residence. Hence, brochures, guides and leaflets produced for information as well as promotional purposes, help destinations to establish expectations of quality, value for money, product image and status in the minds of potential and existing visitors (Morgan and Pritchard, 1998). Besides their importance in influencing the decision-making process of potential visitors in favour of a given destination, brochures, maps and leaflets provided during the actual stay of visitors in the destination, have great potential to influence the attitudes and buying behaviour of visitors to visit numerous attractions and to take part in facilities (Perdue and Pitegoff, 1990).

As Wober (1997a) stresses, almost all of the major city destinations have printed material distributed either in target markets or at the visitor and information offices. While some of these marketing material are provided free of charge, some are sold to finance functioning of visitor centres. Choosing the target markets to which written material will be provided free of charge, the timing of distribution, the content of information, the quantity of written material and the other substitute marketing tools used in order to increase the ratio of message reception by target markets are all important decisions to be made before brochures are designed, printed and distributed to various market segments.

3.5.4.6. IT in Promoting Cities

Information technology (IT), first, entered the tourism sector with computerised central reservation systems mostly used by tour operators, airline companies and international hotel chains. However IT is now further developed, and its use as a marketing device is growing unceasingly. Today, '*computer-assisted communication technologies*' include electronic mail, image transmission devices, computer-conferencing, and video-conferencing. Meantime, *'computer-assisted decision-aiding technologies'* are more sophisticated, albeit more user-friendly services including expert systems, decision-support systems, on-line management information systems, and external retrieval systems, which are all provided for the use of both product suppliers and consumers (Costa, 1996). With further developments in the use of existing IT services and brand new forms of computerised communication technologies, the era of *'computerisation'* will soon fully complete the initial introduction phase of its launch started at the end of the 20^{th} century, and its increasing importance for everyday life will be even more indisputable (Buhalis, 2000).

The reasons for such fast growing importance of IT are explained by its advantages, namely, computerised technologies, services and networks (Costa, 1996, p.125):

1) store, record and retrieve large amounts of information more quickly and inexpensively;
2) access information which originally generates from a geographically remote place more rapidly and selectively;
3) combine and reconfigure information more rapidly and accurately so that it can be used to create new, high-quality and systematic information;
4) use the judgement and decision models developed in the minds of experts or in the minds of the decision maker more compactly and quickly.

The Internet is one of the fastest growing IT services and is now widely used as a marketing medium by many producers. The main reason for such steep growth of Internet use, is that it allows its users to transmit information on a global scale at a cheaper price than other communication methods. As Maider (1997) pinpoints, cheap rates of Internet communication encourage individual users, product suppliers and intermediaries to consider the service for establishing a computerised distribution network via the net. Thus, although it is not initially developed as a marketing medium, but an information distribution network, the Internet has great potential to shape the future trends of consumption and marketing.

Destinations are presented on the Internet through extensive use of World Wide Web (www) pages, which are an electronic medium for transmitting information on registered Internet addresses. Web pages can reach the target markets of a destination and can provide feedback on the numbers of Internet users visiting the site, and also on the characteristics of page visitors providing they fill in electronic forms. In comparison with other information media and marketing tools, web pages have the advantage of combining pictures, movies, written information and sound.

Maier (1997) argues that the use of both web pages and Internet is more common in urban areas compared to those rural areas, mainly because of the high density of potential users. Hence, the author argues that city destination marketers should develop appealing destination pages and locate their web page in various search engines to direct potential users to their sites. Besides, web pages should be updated and changed regularly to keep potential visitors informed about current events, prices and opening times of attractions, booking capacities and weather conditions.

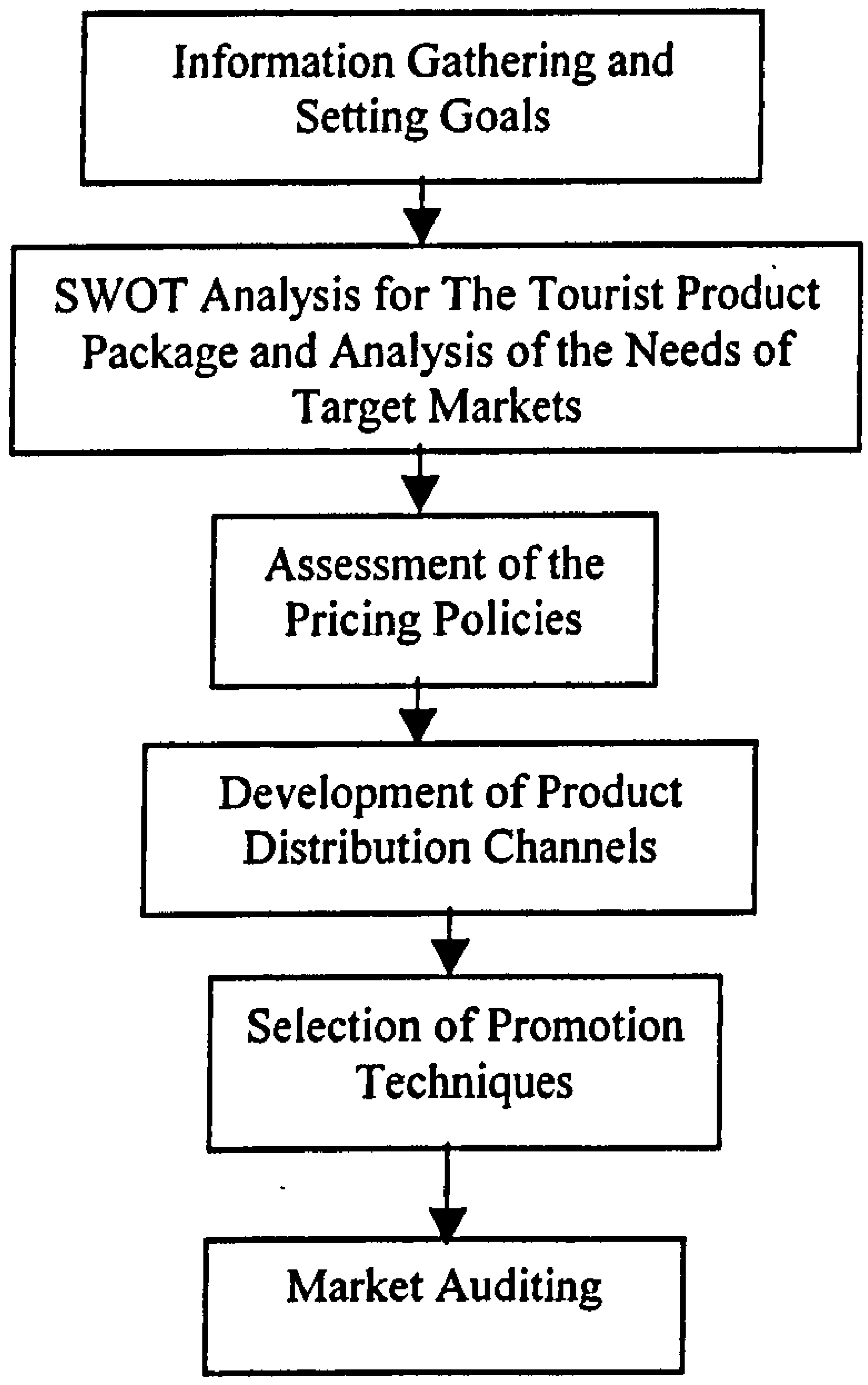
3.6. Planning Marketing Strategy and Tactics for Cities

Tourist destinations need to approach marketing systematically by clarifying their objectives, aims and target markets in conjunction with their supply assets. Thus, in market plans, the issues like: competitive advantages of a city destination; responsibilities of city marketers and relationships between tourist organisations; product improvement and development; identification of potential markets and analysis of existing markets; investigating visitor needs; wants and expectations and; comparing the overall price index of the destination with the competitors should be contemplated. In fact, while there are distinctive differences between city destinations as marketable products and all other services and manufactured products, when it comes to planning marketing activities, the process follows similar steps and principles. Figure 3.3 summarises this marketing planning process for city destinations.

In this process, firstly, aims and goals are established according to the market information gathered on both the product on offer and the demand. The city destination should evaluate its accessibility, attractiveness, infrastructure, its carrying capacity thresholds, the probable income earned by the tourism sector, the current structure of the sector and its management network and the attitudes of locals toward tourism. Such a detailed analysis which shed lights on the relative competitiveness of the product package on offer in comparison to its competitors and its strengths and weaknesses, should encourage city marketers to formulate achievable and realistic aims and goals in their plans. By conducting an analysis of the market and the product, city marketers should be able to foresee future opportunities and threats, which would again shape the marketing goals and aims to be more specific and operational.

Following the establishment of the aims and goals, the target markets are selected according the product package portfolio of the destination at the second step. Once the target markets are chosen in association with the existing markets, pricing strategy needs to be developed. Setting price levels, which are acceptable by the target markets and are compatible with those of competitors, is important. Marketers and decision-makers should also be clear about the possibility to earn as much tourism income as projected by the marketing plans. For example, adjusting price levels and tourism-related taxes in different seasons to balance visitor arrivals can be a marketing tactic.

Figure 3.3. Marketing Planning Process for City Destinations



Source: Based on McCleary (1987).

At the next stage, the accessibility of the destination is strengthened by the appointment of distribution channels. To do that, city marketers work in co-operation with tour operators on packaging the product as well as putting continuous effort into development of new stations and airlines to ease the accessibility of the destination by all major transportation modes. When all of the above steps are completed, city marketers can be involved in promotion activities and choose marketing tools to transmit marketing information in the most effective way to the potential visitors.

Finally, marketing auditing enables city marketers to evaluate whether the initially drawn aims and goals are achieved or not. If the marketing strategy used fails to attract more visitors and to increase tourism income, then city marketers should revise the whole process to find where they have gone wrong. As Laws (1995) emphasises, the marketing planning process is a cyclical process as both demand characteristics and product offers change and evolve over time with the effects of numerous internal and external factors. Hence, conducting regular market research and studying the needs and wants of the visitor markets and rephrasing the planning process with emerging marketing aims and goals are vital for marketing plans to be successful and up-to-date.

One important issue to be noted when planning marketing strategies and activities for city destinations is the diverse and numerous stakeholders involved in the planning process. Although the leading tourist authority (LTA) outlines, prepares and activates the marketing plans and strategies, the support of the stakeholders needs to be established. Marketing strategies need to find the most effective way to mitigate the conflicts between the stakeholders and to encourage them to emphasise on the same distinctive aspects of the city destination when marketing their individual products and services. Hence, the stakeholders and the locals of a city destination need to be involved in the decision-making and strategy development processes (Gill, 1997; Geerts, 2000).

One of the problems caused by the inclusion of the stakeholders and locals in the planning process is that if not all stakeholders wish to take part in the consensus establishment, conflicts between the tourist organisations and different local communities may arise. While the large organisations influence the strategies in favour of the more effective marketing of their products and services, smaller establishments may suffer from a lack of attention. In the same way, larger resident communities may persuade decision-makers to favour their localities when decisions are taken to develop new tourism attractions and recreation facilities. In order to overcome such problems, the LTA should be careful to appoint equal numbers of members representing different sectors of the sector and the local communities (Jamal and Getz, 1997).

The benefits of collaboration between the stakeholders and the local community in the process of marketing planning, on the other hand, are numerous. Some of them can be listed as follows (Jamal and Getz, 1997; Krantz and Schatzl, 1997):

- Marketing plans, which are community-based and are supported by sector stakeholders ideally seek for the ways to sustain the urban tourism resources and to protect the urban environment;
- Through community involvement and consensus development on marketing plans and strategies, tourism organisations, employees and locals are educated on the benefits of the sector for the urban mechanism;
- With the support of tourism organisations and locals, the LTA enhances its vision, responsibility and effectiveness as a decision-maker and planner. The authority implements, monitors and evaluates more effectively in the long-term;
- *'Corporate image'* of a city destination can only be constructed by combining the efforts of all the stakeholders. The corporate and positive image would enhance the competitiveness

of the destination in visitor markets. Marketing information on which all stakeholders agree, is then transmitted to potential visitors in the most effective way and by the use of all possible marketing tools, and;

- City marketing needs to focus on the uniqueness of the product package and should concentrate on the advantages and strengths of the destination in comparison with its competitors. In contrast to general and stereotyped marketing efforts, the process of developing marketing strategies on *'unique selling points'* would be eased by the support of all tourism organisations and the locals.

Research on destination marketing shows that city marketers commonly pursue three different philosophies when planning the tourism sector in their urban systems (Ashworth and Voogd, 1990a). Table 3.5 shows these three philosophies with their relevant goals, orients and values.

Table 3.5. Some Public Authority Planning Philosophies

Dominant Philosophy	**Orientation**	**Goal**	**Example**	**Values**	**Determined by**
Preservation	Object	Protection	Monuments	Cultural	Preservers
Physical Regulation	Spatial Patterns	Conflict Resolution	Urban Conservation	Legal Norms	Planners, Politicians, etc.
Redistribution	Needs	Equity	Recreation	Social	Planners, Politicians, etc.
Marketing	Customer	Sales Development	Tourism Promotion	Market	User

Source: Ashworth and Voogd, (1990a), p.5.

3.6.1. Marketing Goals and Strategies

At the initial stage of any strategy development, when marketing strategies are developed, aims and goals should be formulated in order to define strategies to be accomplished and to compare the achieved outcomes and the expected ones after the activation of marketing strategies. As city destinations evolve with apparent consequences for the urban environment, the marketing goals and aims need to be reassessed, reviewed and even rewritten (Heath and Wall, 1992).

Some of the most formulated common marketing goals by the LTAs of city destinations, especially those in America and Europe, can be listed as follows (Van Engelsdorp, 1988; Heath and Wall, 1992; Gartrell, 1994; Hawes et al., 1991; Akehurst et al., 1994; Law, 2002; Hopper, 2002):

- Attracting market segments, which prefer urban environments to traditional tourist destinations;
- Revitalising urban economies by attracting visitors, residents and businesses through the creation of new tourism-based economic sources for the urban mechanism;
- Strengthening or creating an image especially for those post-industrial cities where the economy is deteriorated with the decline of the manufacturing industries;
- Enhancing visitor experience and visitor satisfaction in order to secure the consistent and sustainable development of the destination with minimal negative effects on urban environment;
- Protecting the unique aspects of the product package such as heritage sites and environmental resources;
- Attracting more high-spending visitors and discouraging economically less beneficial market segments to visit a city destination in order to mitigate the problems caused by overcrowded and seasonal visitor flows;
- Raising the quality of living in the city by introducing new recreation sites and attractions and attracting high-skilled and educated residents and new investments;
- Encouraging joint marketing activities by working as a co-ordinator between tourism organisations in order to strengthen the competitive advantages of city destinations, and;
- Developing a sufficient financial foundation for the continuity and consistency of marketing activities.

In city destinations, one important issue to be noted with regard to marketing goal formulation is that urban marketing goals and strategies are influenced by regional and national marketing goals and strategies defined by higher tourism authorities of countries. Local marketing planning provides guidelines on how individual and exclusive marketing goals should be set according to the analyses of environment and product analyses. However, city marketers should also formulate marketing goals in line with regional and national marketing strategies in order to strengthen the overall tourism policy of the country.

The dilemma is that the broad regional and national goals can only be guidelines for a city destination for which, marketing goals need to be formulated more specifically and should take advantage of the distinctive characteristics of both the visitor markets attracted and the product package sold. Destinations need to decide whether marketing goals will be set according to (Heath and Wall, 1992; Hall, 1998):

- ***'top-down hierarchy'*** in which national and regional marketing goals and strategies are taken as the main concepts for urban marketing goal formulation, or according to;
- ***'balanced goal formulation'*** which suggests participation and interaction between the

levels of the hierarchy, while each level is more flexible in setting their own marketing goals.

Whichever approach city marketers follow, they should be careful to formulate marketing goals, which are consistent and realistic. Any inconsistency between goals would make it difficult to achieve them, while unrealistic goals would make it impossible. Marketing goals serve their purpose only when there is a realistic probability of them being accomplished by marketing strategies. Ambiguous goals would result in lost opportunities, while realistic, achievable and consistent goals pursued by a LTA help the destination to plan its development effectively with economic, social and environmental benefits to the urban network.

Indeed, marketing goals can only be brought into achievable objects by the utilisation of marketing strategies. In other ways, marketing strategies are practices activating marketing goals in a real-life environment. Examples of marketing strategies used to achieve such goals in a most effective way include (WTO, 1994; Reich, 1999; Law, 2002):

- Identification of secondary and opportunity market segments. Whether the marketing will be general, aimed at general interest tourists, or selective and directed to specific types of tourist markets;
- Deciding on the marketing tools and techniques to be used and where they should be directed -to tour operators, the tourist consumer or a combination of both;
- The timing or priority scheduling of promotional efforts to certain types of markets or countries. Timing may depend on the scheduling of tourism development projects;
- The conveyance of the image and reality of the area. A newly developing tourist destination may need to create a desirable image of itself first before engaging in specific promotion;
- Mitigating the effects of crises such as recent political instability or a natural disaster;
- Establishment of marketing bureaux and offices to represent the destination nationally, internationally or locally, and;
- Consideration of any contingencies, which may arise such as the opening of previously closed market sources.

3.6.2. Strategic Marketing for City Destinations

The main notion of strategic marketing is to adjust a marketable product to unexpected changes in the market and the overall business environment with the application of short- and mid-term marketing plans, while long-term marketing strategies and plans outline the main aims and goals to be achieved by the marketers and product producers. Strategic marketing should not be understood as a marketing technique based on solely short-term marketing tactics, but as a marketing process, which suggests the absorption of short- and mid-term marketing plans within long-term marketing strategies.

As Kotler et al. (1993) note, in a marketing environment, the assumption is that the future is largely uncertain. Many external and internal factors ranging from the latest technological changes to economic recession can influence the product-buying decisions and behaviour of customers, hence reshaping the market characteristics of the industries. New market segments may be discovered, new competitors may enter the market and new developments can be projected. That is why marketers should be flexible in their marketing plans and strategies. That is why Kotler (1999) claims that an organisation's strategic marketing plan should include five major components. Beginning with an analysis of the present situation, the strengths and weaknesses of the organisation need to be examined and presented. Secondly, marketing goals and objectives, with realistic time lines should be established. Next, the goals and strategies need to be translated into concrete actions, with specific assignments and performance benchmarks designated, and then communicated in a manner in which all of the players are aware of their specific roles. And lastly, the strategic plan must include a method for controlling and measuring whether the desired goals are attained.

In tourist destinations, the leading tourism authority (LTA) should identify the long-term goals of the tourism sector. The effectiveness of its marketing activities depends on its ability to produce short- and mid-term marketing plans and strategies to adjust the destination product to emerging external opportunities and threats. For effective application of strategic destination marketing, the managerial position of the destination marketing team in a LTA should be identified clearly with the full assignment of required responsibilities. Such a team needs to gather effective and appropriate information through market research and to be alert to changing opportunities and threats. The main task, therefore, should be to establish a control system to mitigate obstacles, which make long-term aims, and goals difficult to achieve and, to integrate place product with changing market dynamics in the short-term.

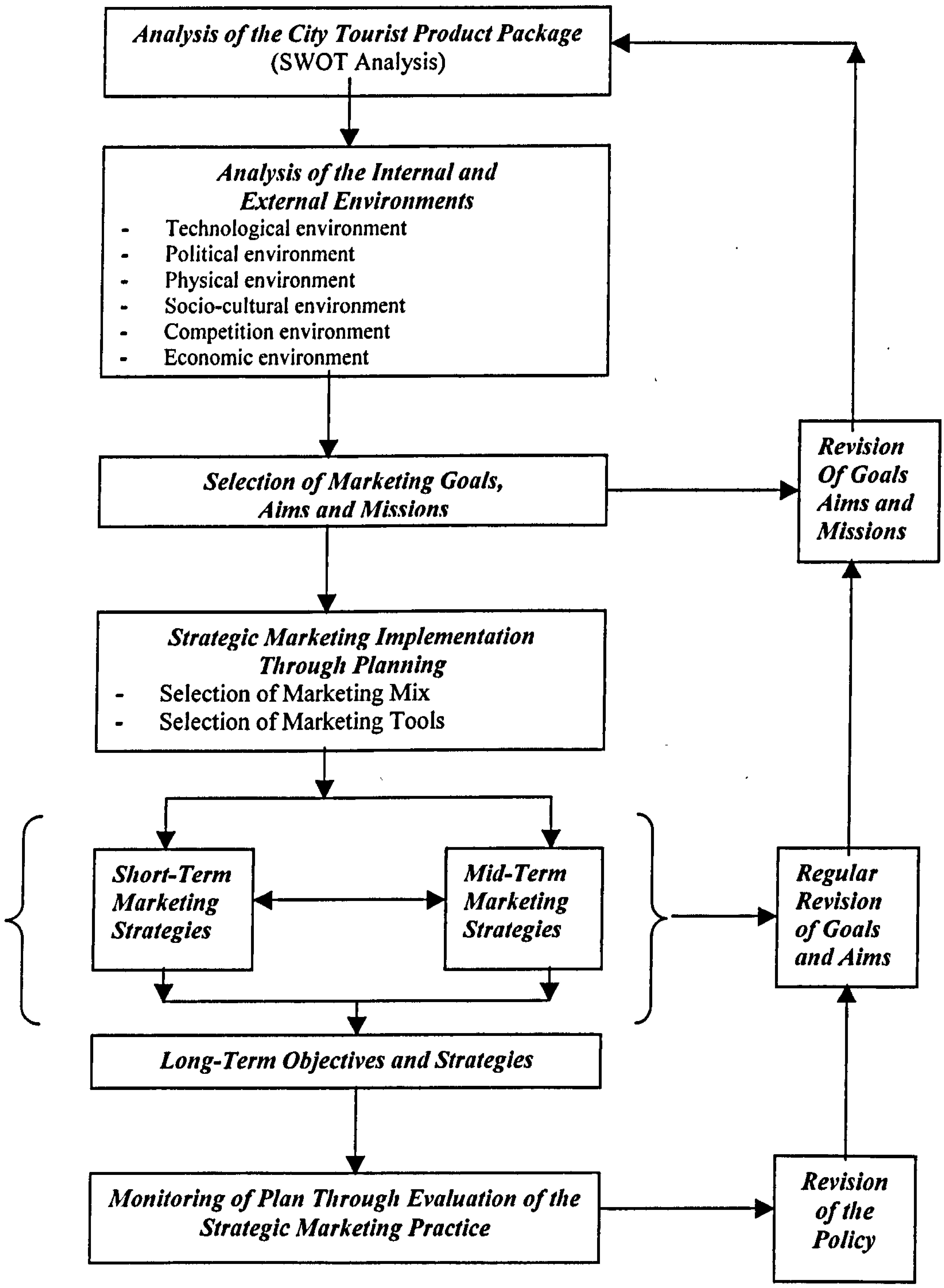
Soteriou and Roberts (1998) emphasise the importance of strategic marketing with its ability to stimulate managerial action in contrast to static long-term marketing plans. In changing tourist markets, an action-oriented approach of strategic marketing enhances the competitiveness of destinations. That is why the number of city tourist authorities, which commit to strategic planning is increasing especially in the well-established destination markets of the USA and Europe. While general market variables like changing political environments and government funding for tourism, price and tax regulations, environmental issues and demographic changes in visitor markets influence the marketing planning process of destinations, destination-specific issues like the quality of the tourism product, overcrowding, visitor safety, seasonality problems and community attachment toward tourism force city marketers to take strategic marketing seriously.

The process of developing a strategic marketing plan for a city destination is shown in Figure 3.4. The process starts with the analysis of the destination product package and assessing its strengths, weaknesses, threats and opportunities. Clearly, such an analysis is directly linked to the analysis of the influences caused by the internal and external environments of the package. The external environment of the product consists of those factors that the destination cannot control, hence adapt itself to the changes and trends occurring in such environments through the evolution process. The internal environment of a destination product package, on the other hand, is called the competition environment in which the product package competes with other destination offerings in order to attract certain market segments. Within the internal environment, the stakeholders exist alongside existing and potential visitors and, ideally, bring their resources together to undertake corporate marketing activities to serve corporate aims, goals and missions (Heath and Wall, 1992).

The most important phases of a strategic marketing process are the identification of marketing goals, aims and missions and, monitoring the plan. In order to keep the strategic marketing plan up-to-date and consistent with changing marketing characteristics, therefore, regular revisions of goals are imperative. This enables marketers to track performance, identify performance gaps and initiate problem-solving actions to close the gap between desired and actual results. Marketers should establish evaluation systems, which would provide meaningful and appropriate results of the plan undertaken (Heath and Wall, 1992). The introduction of regular evaluation applications provide a framework for monitoring and assessing the performance of a destination, its adaptability to both the internal and external environments and the identification of priorities and allocation of marketing resources (Faulkner, 1997).

Calantone and Mazanec (1991) suggest that strategic marketing of destinations can be evaluated and analysed by so-called portfolio analysis. According to this approach, the success of destinations in strategic marketing application is analysed according to market growth rate, relative market share and the contribution of marketing efforts to overall visitor figures. Such an approach is clearly associated with the effective identification of various market segments and the market profiles of each market segment. One of the criticisms of this approach is the limited number of evaluation criteria utilised to detect the practised strategic marketing techniques and tools by various destinations. By its very nature, the analysis relies on statistical data, while qualitative information is excluded. Cognitive matters such as the relative competitiveness of a destination, the perceptions of visitors on the quality of tourism products and, the perceived attractiveness of the destination among various market segments are difficult to measure, which limit the scope and validity of the portfolio analysis.

Figure 3.4. The Development Process of A Strategic Marketing Plan for City Destinations



Source: Based on Heath and Wall (1992), Middleton (2001) and Williams (1998).

Other evaluation methods described by Faulkner (1997) are:

- *Tracking and conversion studies*: These studies are concerned with identifying the immediate impacts of programs. They attempt to monitor changes in the markets' awareness, interest, preference and intentions as a consequence of exposure of advertising campaigns. Although such studies provide immediate feedback on the effectiveness of the programme, it lacks to analyse the effects of other factors influencing the final decisions to travel to a destination apart from the advertisement.

- *Multivariate analysis*: It aims to identify a combination of social and economic conditions, which may also have a bearing on propensities and capacities to travel. The effects of inflation, exchange rates, economic crises, hallmark events like Olympic Games, political crises like Gulf War or terrorism on travel decision making process are studied by this analysis.
- *Experimental and Quasi-Experimental Design*: These methods try to measure the effects of various factors on travel decisions, by observing additional people other than visitors as a control group in order to validate the outcomes of a program is not caused by an external factor, but itself as preceded.
- *Cost/Benefit Analysis*: This analysis takes advertisement expenditures as an explanatory variable for the change in tourist numbers and income by the use of some regression analyses.
- *Shift-share Analysis*: Unlike all of the above methods, shift-share analysis requires techniques to be used over a long period of time rather than providing snapshot conclusions. This method tries to research the position of a destination with respect to its share of a particular market, and provides insights into the overall movements of the destination in the market in the long term.

As Faulkner (1997) further adds that, in the context of tourism destinations, the evaluation process should combine more than one method, which should be conducted at different phases of the plan. Such '*a multi-layered approach*' is required, firstly, because the LTA is not the only authority responsible for marketing a destination to all market segments. Various marketing activities, which focus on numerous aspects of the tourist product package, are undertaken by diverse groups of sector stakeholders. Evaluating strategic marketing plans of individual tourism organisations and then assessing their adaptability to the strategic marketing plan of the overall destination product package necessitates a multi-layered approach. Secondly, the approach is necessary because, as mentioned above, none of the evaluation methods can provide a framework of the sector as a whole and analyse the influence of various factors on the marketing efforts of the destinations.

Besides all its beneficial effects on marketing planning for non-profit organisations, strategic marketing is still not that common among city destinations in comparison with the manufacturing industries in a private sector environment. One of the common mistakes made by the destination marketing bodies is to produce short-term marketing plans and to neglect the need to establish long-term aims and goals. This is mainly due to the overall national tourism policy of changing governments and their influence on regional and local tourism plans. However, without effective and appropriate long-term marketing plans, strategic marketing consisting of short-term tactics and strategies would not result in sustainable tourism development.

3.6.3. Image Marketing

Barke and Harrop (1994) note that cities have identities, which reflect their unique aspects as well as other common amenities, facilities and functioning of urban mechanisms. The dilemma, however, occurs when one needs to relate the identity of a city to its image, as they are not the same and do not always correlate. Unlike the determinants of place identity, image is referred to as the sum of beliefs, knowledge, prejudice, imaginations and impressions that either an individual person or a group of people have of a given place (Jenkins, 1999). As Krantz and Schatzl, (1997) note, the image of a city may be linked to urban change including better tourist attractions and recreation opportunities, cultural innovation and physical upgrading.

In many cases, an identity of a place takes part in its image building process and may have a strong influence in its evolution. However, since image is shaped according to the perceptions of outsiders and also the locals of a city, the interrelation between the identity of the city and its image could be undermined by many external factors misinforming the message recipients, hence affecting the image negatively.

That is why local authorities and city marketers are eager to present the distinctive characteristics of their city to place it on the international tourism map. Today, there are very few cities in developed countries, which do not actively engage in forms of image marketing and building (Hughes, 1999). Clearly, no city would try to market its products, services and amenities by focusing on its weaknesses. Instead, its accessibility by major transport modes, its high standards of living with various attractions and recreational activities, its unique culture and heritage sites and its prospering economic sectors are emphasised. In short, the aim of city marketers is to represent their city as a vibrant and happening place with numerous job opportunities in order to attract new residents, visitors and businesses (Burgers, 1995; Mancini, 1999).

However, this is not unique to a particular destination but is practised by many major city destinations competing in the international arena. As Holcomb (1994) notes that this gives rise to similarities in the way cities try to present themselves to their target markets. Modern architecture in business districts, new shopping centres, motorways surrounding inner-cities and even street-entertainers are commonly used as image constituents in the marketing activities of the major city destinations. The challenge, then, happens to be to create an image which reflects the strengths of the city's product package and, which is related strongly to its identity. Copying the image of competitors may not result in the outcomes anticipated by marketing strategies, and may even hamper the success of new tourism developments (Jenkins, 1999).

As Short et al. (1993) note, the industrial cities of developed countries have experienced a dramatic change in their perceived image following the continuous efforts of local authorities and decision-makers to revitalise their economic structures since the start of the 1980s. These cities whose image centred on weaknesses such as pollution, declining economic wealth, unsafe streets and increasing unemployment rates, have managed to transform their negative images into a post-industrial image characterised by globalisation, de-industrialisation and post-fordist consumption trends (*see Chapter 2*). While re-imagining strategies used by local planners and marketers have helped such cities to be seen as economically sustainable, culturally rich and socially happening urban areas, on-going revitalisation programmes induced by new tourism and recreation developments have helped to diminish the effects of industrial decline, economic restructuring, and the increased urgency to secure service sector activities (Bramwell and Rawding, 1996; Law, 2002).

As an example, Short et al. (1993) show how the image of Syracuse has been transformed from gloomy factory chimneys to modern skylines. Similar image transformation campaigns were experienced by many other American cities including Baltimore with the famous HarborPlace project, Pittsburgh and Cleveland (Millspaugh, 1990; Holcomb, 1993; Law, 2002; Page and Hall; 2003). The key points when transforming such negative images, can be summarised as; accessibility, heritage, cleanliness, economic prosperity, safety and vitality, in other words: *'an increased quality of living in urban areas'* (Pattinson, 1990).

Once existing product and service qualities meet the desired levels in the city, local authorities and city marketers can use the positive image of the city in their marketing activities. Furthermore, the positive image can be placed at the centre of various marketing activities run by diverse city marketers and local authorities. So called *'image marketing'* has been practised by organisations of the manufacturing industries to market their tangible products since the 1970s (Ashworth and Voogd, 1994). However, the application of image marketing cannot be adapted to intangible service products easily, since these products are heterogeneous and their service qualities may alter from time to time.

The images of city destinations, meantime, are more difficult to clarify, as they combine a bunch of tangible and intangible components within a tourist product packages. As can be seen in Table 3.6, some of these image constituents are rather *'holistic'* representations of a city destination, and measuring their influence on visitor buying-decision process is almost impossible. Indeed, perceptions of different visitors on the attributes like atmosphere, cleanliness, authenticity and sophistication can be so diverse that image measuring of such attributes may result in vague, complicated and imperceptible conclusions (Jenkins, 1999). This is why researchers tend to categorise image constituents according to their contribution to the image formation process, when measuring their effects on the establishment of an overall destination image.

Table 3.6. Some image constituents of city destinations

Hospitality/friendliness/receptiveness	Costs/price levels
Climate	Nightlife/entertainment
Sports facilities/activities	Shopping facilities
Personal safety	Different cuisine/food/drink
Restful/relaxing	Historic sites/museums
Accommodation facilities	Different customs/culture
Tourist sites/activities	Local infrastructure/transportation
Architecture/buildings	Crowdedness
Cleanliness	Accessibility
Facilities for information/tours	Atmosphere (familiar vs. exotic)
Economic development/affluence	Family or adult oriented
Opportunity to increase knowledge	Quality of service
Fairs/exhibitions/festivals	Extent of commercialisation
Political stability	Fame/reputation/fashion
Degree of urbanisation	Friends and relatives
Sophistication	Interesting
Busy/exciting	Local people
Authenticity	Language spoken
Quality of merchandise	Theme parks
Racial prejudice	Parks/green areas

Source: Jenkins (1999), p.10.

Gunn (1989) splits the image formation process into *'organic'* and *'induced image formation'*. While the author argues that the induced image formation is a function of the marketing and promotion efforts of a destination area or business, organic image emanates from sources not directly associated with any intentional marketing efforts directed at particular target markets, but from popular culture, the media, literature and education.

Gartner takes this two-step process further by suggesting eight distinctly different components of image formation (1997):

- *Overt Induced I*: This step consists of traditional forms of advertising. The use of television, print media, brochures, billboards, etc. by destination promoters is a direct attempt to form particular images in the minds of prospective travellers.
- *Overt Induced II*: This image form consists of information received or requested from tour operators, wholesalers and organisations which have a vested interest in the travel decision process but which are not directly associated with any particular destination.
- *Covert Induced I*: It consists of developing images using traditional forms of advertising, as in Overt Induced I, however, the image is now being projected through the use of a second-party spokesperson. The use of a second party tends to mask attempts by destination promoters to influence the audience directly, hence the use of the adjective covert.
- *Covert Induced II*: This occurs when the person influenced by a covert agent is not aware that destination promoters are directly involved in the development of the projected image. Covert Induced II agents take the form of ostensibly unbiased articles, reports and stories about a particular place, delivered by someone with high credibility who apparently has no vested interest in the destination. Familiarisation trips come in this form.
- *Autonomous*: This image component consists of independently produced reports, articles, films, documentaries, etc. about specific places. There are two sub-components in the autonomous category: news and popular culture.
- *Unsolicited Organic*: It consists of unrequested information received from individuals who have visited an area or believe they know what exists there.
- *Solicited Organic*: It consists of requested information received from a knowledgeable source, generally one's friends or relatives. Because of the nature of the information flow, the credibility factor is very high. This stage is also referred to as *'word-of-mouth'* advertising.
- *Organic*: The final component consists of actual visitation, after which a new destination image is formed in the mind of the visitors. The visitor, holding a new image, feeds back into the image formation cycle as a distributor of information in the unsolicited and solicited organic components.

Jenkins (1999), on the other hand, divides the methods of image measurement into; *'structured'* and *'unstructured image research'*. While structured methods specify various image attributes and incorporate them into a standardised instrument, unstructured methods allow respondents to describe the image of a place freely. Both of these two methods have their own disadvantages.

Structured methods:

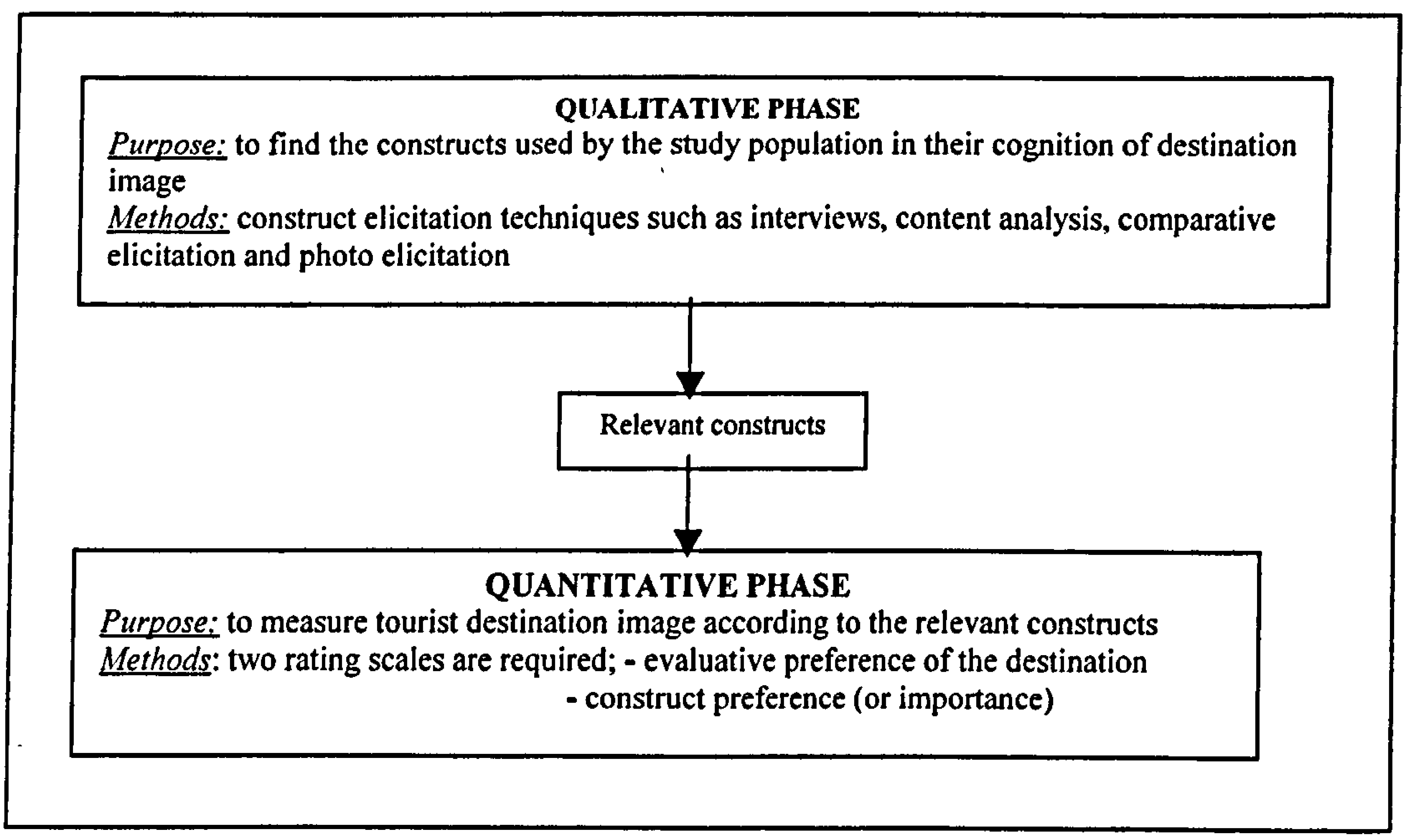
- are too focused;
- force respondents to define an image according to the attributes specified by a researcher and does not incorporate holistic aspects (psychological) of image, and;
- use word-based scales and does not help interpret visual techniques.

On the other hand, unstructured methods:

- lack clarity due to detailed information provided by respondents;
- limits the research with a single destination and are difficult to be conducted for comparative analyses, and;
- cannot easily be verified by statistical analyses.

The author suggests combining both of these methods when conducting image research in order to achieve valid results. Figure 3.5 shows that the research design process should concentrate on both unstructured techniques to elicit the relevant destination image attributes (qualitative phase) and structured techniques to investigate image (quantitative phase).

Figure 3.5. A Model for Destination Image Research



Source: Jenkins, (1999), p.7.

Despite all its difficulties, analysing the individual phases of an image creation and marketing process for tourist destinations can provide insights into the image marketing of city destinations. Such a process should include the following steps:

- ➢ deciding the aims and goals of image marketing;
- ➢ choosing image constituents and image icons;

- creating or strengthening an image of the destination;
- identifying communication modes to transmit the image to target markets, and;
- monitoring and measuring image held by potential and existing visitors.

However, another difficulty when analysing city images is that it is not only visitors who have perceptions, beliefs, opinions of a particular city tourism product package, but also intermediaries such as the travel industry, urban authorities, the stakeholders of the sector and the locals (Morgan and Pritchard, 1998). Therefore, overall urban planning policies, the approach of local authorities toward tourism and existing tourism developments taking place in a city, play an important role in shaping the aims and goals for the involvement of image marketing. Not all city destinations have similar aims and goals. If a city already benefits from a positive image as a tourist destination in its target markets, its image marketing activities would be different from the post-industrial city whose tourism functioning is fairly moderate. The earlier city may aim to strengthen its existing positive image with new tourist attractions and services, while the later needs to create a new image based on a new product package by emphasising on the strengths of the city.

However what these varied city destinations have in common with regard to their involvement in image marketing is that they aim to cluster numerous tourist products and services within a package associated with an overall urban image which is symbolised mainly by major landmarks. In fact, landmarks, which are distinguishing and unique characteristics of a city destination, are the main image icons in almost all city destinations (Dahles, 1998). Heritage sites, cultural, recreation activities and modern architecture are among the most used image icons by city marketers. Sydney's Opera House, New York's Statue of Liberty, London's Big Ben and Paris' The Eiffel Tower are some of the most famous landmarks.

Image marketing can also be built on a newly created slogan or a logo representing the city destination in the target markets. As Ward (1998) stresses slogans have been the most important components of destination marketing since the very early days of resort advertising in Britain and the United States. Among the numerous examples given by the author some are *'Atlantic City: America's Greatest Resort'*, *'Atlantic City: The Playground of the World'* and *'Blackpool- The Nation's Tonic'* which are all used to suggest the essence, appeal and main markets of the concerned cities. Examples of logos include the London marque developed by the London Tourist Board, the Big Apple and *'I ♥ NY'* campaigns of New York and Mr Happy of Glasgow (*see Appendix 1*). The use of landmarks, logos, specific names and symbols in image marketing reinforces the distinctiveness of city destinations and distinguish them from their competitors. In a way, the use of such landmarks, slogans and logos or a combination of all helps each city destination to '*brand*' its product package with the strongly associated image constituents in the minds of potential visitors (Bramwell and Rawding, 1996; Morgan et al., 2002).

The most important issue to note when deciding on image icons, slogans and logos for city marketers is the needs, wants and expectations of potential customers. While urban marketing ideology moves from marketing what a city has, to what customers want to buy, image and its marketing should refer to consumer-oriented marketing (Holcomb, 1994). City marketers should pay extra attention to the marketed image and its perception by potential users of the urban product. One should not forget that destination images change very slowly and are formed in a long-term and it would take years to shift their direction from negative to positive. Therefore, consistency is a requirement for long-term image change, which should ideally be executed by professional marketing agencies (Gartner, 1997; Day et al., 2002).

Once an image is created or strengthened, city marketers decide on the communication modes to transmit the image to potential users of the urban product. The transmission of an image becomes especially important if there are polarities between the image of an urban product created by city marketers and the image of the city envisaged by potential users of the product. Ashworth and Voogd (1994) emphasise that deciding on the modes of communicating information to transmit urban images is as important as deciding on the image constituents and strategies to be used in image marketing activities. This is because different communication modes may have different impacts on potential users, and they may influence the way messages are received by them. The authors note that the nature, strength and credibility of an image message are affected by the mode chosen which influence the acceptance and reception of the message by potential users.

To conclude, image marketing is used to influence attitudes and behaviour of potential and existing visitors in three main ways: to confirm and reinforce behaviour and attitude; to create new patterns of behaviour and attitude; or to change attitudes and behaviour (Morgan and Pritchard, 1998; Jansen-Verbeke, 1985; Day et al., 2002).

3.6.4. Positioning City Tourist Destinations

Positioning of tourism destinations refers to the needs to distinguish different product package offers of destinations to gain advantageous positions in competitive markets, and to present them as almost '*branded*' commodities by the use of various promotion techniques (Calantone and Mazanec, 1991). For city destination marketing, Krantz and Schatzl (1997) relate positioning to the term '*unique selling points*' which revolves around a strategy of giving an impetus to visitor arrivals to a particular destination by drawing distinctions between its core elements with major pull-in factor and the products offered by the competitors.

Such a positioning strategy follows a three-phase procedure. While it starts with an analysis of demand and supply characteristics of the tourism sector of a city destination, it continues with market segmentation and product differentiation in respective segments. While these three phases are studied in the following sections, it should be noted that a misinterpretation of any of these phases in the strategy development procedure may result in unsystematic, ill-planned and unconvincing strategies.

3.6.4.1. Analysis of the City Tourism Markets

Development of marketing strategies requires analyses of both the supply and demand sides of a destination. While a detailed analysis of the product package enables city marketers and planners to distinguish the strong and weak aspects of the tourism sector, an analysis of the existing and potential markets helps them to investigate how the destination package is perceived in those established, emerging and opportunity markets of the visitor generator countries. Therefore, market analysis can mainly be interpreted as the activities to define visitor markets and to draw boundaries between various market segments according to differing needs, expectations and wants of each type of visitor segments.

While the analysis of current market segments is important in the process of strategy development, forecasting future trends and improving the aspects of a product package according to what may be desired by visitors in the future, are essential aspects of market analyses. Furthermore, market analyses search the new trends such as modes of travel to/within a destination, origin of visitors, seasonal fluctuations of visitor arrivals, demographic characteristics of visitors, purpose of travel, average duration of stay in the destination, tourism expenditure and use of various components of the product package ranging from individual attractions to accommodation (Heath and Wall, 1992).

Mainly based on the data gathered from tourism statistics and visitor surveys, analysis of market segments is, therefore, necessary to shape the visitor profile of a destination. A thorough assessment of a visitor mix structure of the destination helps marketers to understand how successful the city is in attracting different market segments. An emergence of new trends and changes in the buying behaviour of different market segments and their attitudes toward holiday taking, should be monitored regularly in order to update and adapt the marketing strategies and tactics of the destination to these new trends. City marketers should be aware of the market segments, which have reached saturation level in travel demand, and the ones, which have recently shown interest in the destination, so that the attention of marketing efforts can be shifted accordingly (Mazanec, 1997d; Law, 2002).

3.6.4.2. Segmenting City Tourism Markets

Analysing market segments for individual city destinations and consolidating visitor mixes and profiles for each product package are the necessities of strategic marketing. Strategic marketing suggests that city marketers and service providers should be clear about their visitor mixes and should decide on how much marketing effort should be directed toward which market segments (Calantone and Mazanec, 1991). Planners and marketers of both a city product package and individual products and services should be able to categorise various types of visitors into different segments according to the needs, wants and expectations of different visitor groups, their potential to consume the destination product package, their awareness of the package and the communication channels they are most likely to be affected by (Heath and Wall, 1992).

Once visitors are split into different market segments, attention should be paid to the techniques and methods used to classify demand characteristics. Market segmentation does not produce valuable outcomes for effective marketing, unless it uses a systematic and conceptual approach. As it is emphasised in the literature on the subject (Laws, 1995; Heath and Wall, 1992; Wanhill, 1995; Middleton, 2001), when categorising market segments, marketers should be careful that each segment:

- is identifiable and measurable so that visitors trends may be monitored;
- can be reached through promotion and through distribution networks;
- has a potential of generating business through directing sufficient visitor flows to the destination;
- can help the city destination to gain competitive advantage over its competitors providing the product package consists of tourist products and services which would meet the needs, wants and expectations of the market segment attracted, and;
- is identified according to the unique characteristics which distinguish each segment from another and are not temporary.

Market segmentation can be based on existing research, statistical data or information compiled by competitors in the market. One of the methods to decide market segments is to look at the origin of visitors, which is usually gathered by national tourism authorities of many countries. In the same way, other statistical data such as purpose of visit, demographic and socio-economic characteristics of visitors, duration of visit and preference of accommodation can all be used as determinants for the selection of different market segments (*see Table 3.7*).

Table 3.7. Bases for Market Segmentation

	GENERAL	BEHAVIOUR-SPECIFIC
OBJECTIVE MEASURES	Age, income, sex	Past behaviour;
	Place of residence	- Purchase quantity
	Status change	- Outlet/brand preference
	Family life cycle	- Loyalty
	Social class	Decision role
INFERRED MEASURES	Personality	Beliefs, perceptions
	Psychographics/ life styles	Benefits sought
	Values	Personal influences
		Stage in decision

Source: Kotler and Andreasen, (1996), p.157.

In his research, Mazanec (1997c) analyses different market segments for the Austrian cities of Vienna, Graz, Linz, Slazburg, Innsbruck and Klagenfurt according to the main purpose of travel. The author suggests that a motivational segmentation mainly based on various vacation styles, is best applied on completion of detailed SWOT, supply and demand analyses of a particular destination. The managers and marketers can, then, decide which visitor groups are to be attracted among a number of identifiable and significantly different market segments whose needs would be met with the product package of the destination. A motivational segmentation of the Austrian cities which includes the following segments, is then provided according to the main purpose of travelling and to the attitudes of visitors within a city:

- the relaxation-and-comfort-seeker style;
- the atmospherics-seeker/demand-and-afford style;
- the modest-and-low-profile style;
- the emotionally attracted place-and-people style;
- the emotionally detached place-and-people style, and;
- the fun-and-excitement-seeker style.

The difficulty with such motivational segmentation is that there may be some overlaps in similar tourist activities and facilities experienced by different market segments. Although a visitor who belongs to the modest-and-low-profile group is not expected to stay in a five star hotel, s/he can participate in or consume tourist products and services such as museums, high-street shopping or visits to major landmarks which are most likely experienced by other visitor segments too. In fact, as Ashworth and Voogd (1988) note, visitors to a city destination tend to have more than one motive and take part in more than one tourist activity within the destination. Hence, when identifying various market segments for city destinations, a combination of various segmentation methods may be more comprehensible and flexible than relying on the results of a single segmentation method.

Still, a motivational segmentation of visitor groups helps tourism marketers and planners to choose the most effective communication strategies for each segment. They also provide insight for marketers into the common and differing expectations of each market segment. Mazanec (1997c) notes that, for the Austrian cities, while the aspects of the product packages including cultural activities, safety and a favour for good food and beverages are not perceived differently by dissimilar market segments, the perception of the atmospheric attributes of a city trip shows polarities. Hence, when aiming to promote a city to a particular market segment, city marketers should concentrate both on the atmospheric attributes of the city which are appealing to that segment, and on the marketing tools and strategies which would give clear messages.

Following the identification of different market segments, city marketers and planners can choose one of the four options of marketing segmentation strategies. According to Heath and Wall (1992), these are: undifferentiated marketing, extensive segmenting, selective segmenting and single segmenting (*see Figure 3.6*). Undifferentiated marketing is basically when marketing activities do not imply unique characteristics of different market segments, but focus on the commonalties of an overall visitor profile. Hence, undifferentiated marketing suggests that the components of a product package which are mostly used, consumed and experienced by all types of visitors, should be at the centre of the marketing activities run by city destinations. Clearly, such an undifferentiated marketing strategy is cheaper than other strategies, since a single message about an overall product package is sent to all visitors.

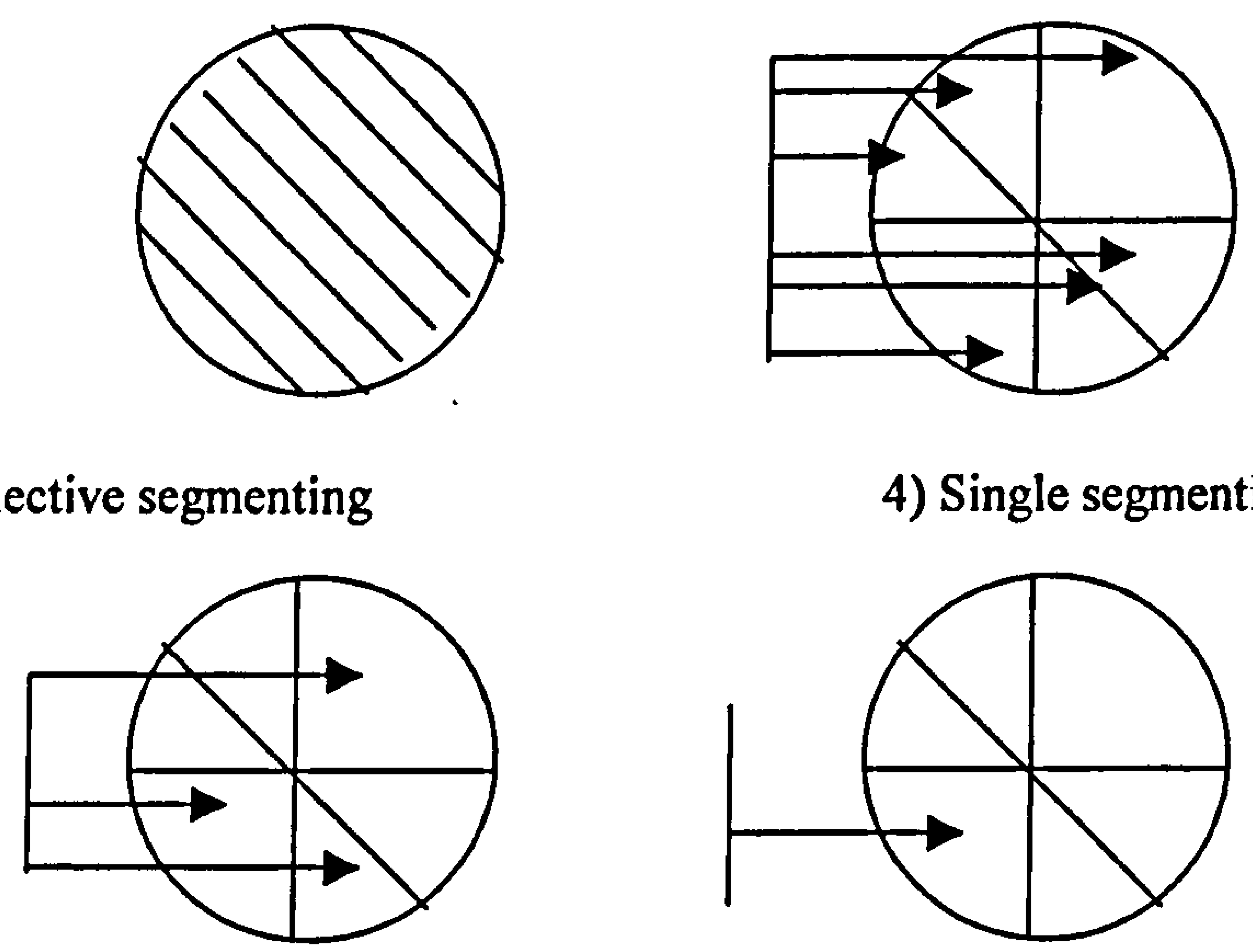
Extensive marketing, in contrast, is when different sub-products of a city destination are combined in various packages and are offered to all of the different market segments accordingly. This type of marketing is the most expensive way of marketing among the four options, since different marketing mixes of a single product package need to be developed for various market segments. Selective segmenting, meantime, is when city marketers and planners identify various market segments of a city destination and run marketing activities in only some of them, which are considered to be more beneficiary for the destination.

While selective marketing concentrates on each of the segment which are intentionally chosen according to the demand and supply characteristics of a given destination, it eliminates the risks of focusing on a single segment which suggests developing a marketing strategy for a specific market segment only. Heath and Wall (1992) explain the risk of concentrating marketing efforts on a single segment as overspecialisation. An unexpected decrease in visitor arrivals in the chosen segment to a destination may cause severe damage to the sector before new segments are identified and marketing strategies are developed for other segments, which were neglected before.

Figure 3.6. Regional Targeting Options

1) Undifferentiated marketing 2) Extensive marketing

3) Selective segmenting 4) Single segmenting



Source: Heath and Wall (1992), p.106.

Although segmenting visitor mixes is an important phase within the process of positioning city destinations, it cannot be used on its own as a marketing strategy without the other three interrelated phases of positioning *-i.e. analysis of markets, targeting market segments with a promotion mix and differentiating-*. Thus, market segmentation should be entwined within a four phase process of positioning, and should be supported by the demand and supply analyses of the concerned city destination.

3.6.4.3. Product Differentiation in City Marketing

The complex and manifold demand and supply side characteristics of urban areas make it difficult to differentiate a product package, which combines numerous individual products and services. Besides, it is difficult to make changes on the components of a package, as some characteristics of urban areas like heritage sites and the built environment are inherited from the past and cannot be rebuilt or abandoned. What city managers can do, however, is to benefit from such places effectively in terms of their importance for the tourism sector. Many derelict sites and buildings can be transformed into new attractions and recreation sites through renovations and restorations. In fact, the marketing efforts of many post-industrial cities to transform their *'industrialised'* city images into *'vibrant tourist destination'* images can be considered within the concept of product differentiation (*see Chapter 2*).

However, product differentiation in urban tourism becomes more apparent in the examples of corporate marketing efforts of city marketers and tourism authorities, which concentrate on certain tourism *'themes'* such as marketing cities as culture, shopping or art destinations. By monitoring visitor flows, city marketers may have a reasonable insight into the visitor profile of a city destination and can select the most desired market segments and those, which are to be discouraged from visiting the destination. Depending on the supply side elements, which should be appropriately attractive for the desired market segments, product packages can be marketed with such *'themed image'* campaigns (Hopper, 2002; Getz, 1998).

Once the chosen market segment reaches its saturation level and becomes a threat for the carrying capacity threshold of the city, planners and marketers can move onto another market segment providing that relevant attractions and services are either developed or improved by service providers. Image formation of a city, for example, may proceed from the city being a culture destination to the shopping city. Nevertheless, since many major city destinations are able to attract various types of visitors, it is not always easy to detect how product packages are differentiated, and which particular market segments are targeted by destinations.

Moreover, differentiating a city product package cannot always be beneficiary to all tourist product and service providers. Marketing a city destination as a *'shopping destination'*, for example, may hamper the businesses of tourism organisations, which have no relevance to shopping. It is a fact that once a visitor is drawn into a city, s/he can be encouraged to participate in other types of tourist attractions. However, the dilemma may occur when convincing museums, heritage centres or sports complexes to support the marketing activities, which target mainly *'shopping visitors'*. The other reason is what academics explain as the lack of knowledge on the ways of undertaking product differentiation strategies by city marketers and tourist authorities (Calantone and Mazanec, 1991; Dietvorst, 1993a).

Evans et al. (1995) list three strategies for city destinations to concentrate their marketing efforts in different market segments. Though it may be difficult to place specific tourism destinations precisely into one of these categories, the model provides a conceptual framework for tourism managers to consider. As the author adds, many destinations fail to develop a strategic competitive advantage and are stuck in the middle. Lacking a focused approach, these destinations will find it increasingly difficult to attract consumers away from competing destinations. The categories are:

1) ***Overall Cost Leadership Strategy***: The overall cost leadership strategy requires managers to develop a sustainable cost advantage over their competitors. This allows the organisation to earn strong profits while attracting consumer with lower prices. The perceived value of the product becomes the competitive advantage. The success of this strategy depends on efficiency, economies of scale, tight cost controls and high market share. Since, costs for a visitor include travelling distance, time and hassles as well as direct financial costs, '*low cost destinations*' may need to increase investment in infrastructure for roads, airports etc., but need to invest relatively little on extra facilities and amenities. Marketing efforts should focus on mass marketing methods, low cost industry trade-offs, free media publicity, or creative criss-cross marketing with sector partners. Atlantic City is given as an example of this category. Since gambling subsidises lodging and restaurant prices in Atlantic City, the destination benefits from low pricing, group marketing efforts and maintaining year round business volume.
2) ***Differentiation Strategy***: This strategy seeks to gain a price premium by creating extra value for which the buyer is willing to pay. This price premium allows the firm to earn strong profits, while covering the extra costs necessary to better meet the needs of consumers. The strongest differentiators offer a product with features that are truly unique in relation to other products available in the sector. This uniqueness may be based on product features, technology, and quality; or it may be based on intangibles such as customer service, marketing, or the design and image of the product. Destinations, which choose this strategy, may need to incur heavy capital costs for infrastructure, buildings and landscaping. Orlando and San Francisco are examples. These destinations offer a combination of unique product factors including natural beauty, interesting architecture and landscaping, first class entertainment and original hospitality and culture.
3) ***Focus Strategy***: While the low cost and differentiation strategies attempt to appeal to customers on a sector-wide scale, the focus strategy is founded on serving a particular target group better than competitors who are competing more broadly. These services may be based on cost advantages (low cost focus) or on more effectively meeting the needs of target groups (differentiation focus). A low cost focus strategy is based on a target group whose needs can be met at a lower cost than those of the broader market. The differentiation focus strategy, on the other hand, centres on offering extra value that better meets the unique desires of a specific target group. Destinations in this category exploit unique features *-i.e. culture, history-*, which allow them to cater especially to target markets *-i.e. history buffs-*. Aspen is an example.

3.7. Marketing Research: The Information Base for City Marketing

In addition to product development, advertising and promotion of city tourist packages, one other important aspect of the city marketing process should not be ignored: *'marketing research'*. Only by conducting marketing research can city marketers decide which market segments are to be attracted and which are to be discouraged from visiting their city. Surely not all visitors are desired. In other words, effective marketing should identify the market segments to be attracted to a particular city destination (Faulkner, 1998).

Valuable information on travelling motives of visitors, major generating markets, perceptions of visitors about the city and its attractions, demographic characteristics of visitors and attitudes and behaviour of visitors during their stay in the city can only be obtained through extensive marketing research. According to the results of in-depth marketing research, marketing activities can be directed toward the markets in which residents would fit into the market portfolio of the destination marketed (*see Section 3.5.1.1. on city destinations' market portfolio*).

Therefore, obtaining information on both potential and existing visitors is one of the fundamental phases of the city marketing process. The adequacy and validity of the information gathered at every stage of the marketing process should result in adequate, effective and correct decisions taken by planners and marketers. Nevertheless, in the context of limited funding and the high costs of maintaining information on visitors, many local tourist authorities are unable to hold in-depth and extensive marketing research investigating all aspects of the tourism sector. The multi-sided supply components and the variety of visitor types make it difficult to conduct research into each market segment and their use of various tourist products and services.

Public authorities and tourism partnerships now tend to divide the tourist product package and its market portfolio into categories and then to research each category individually. So, researching tourism movements in certain districts of a particular destination *-i.e. researching visitor flows to East London-* or the characteristics of different market segments *-i.e. research on shopping tourism-* has become a prevalent way to obtain information on tourism in cities.

To conclude, secondary data such as local, regional and national information on visitor activities, methods of arrival to destinations, participation in different types of attractions, types of intermediaries used to book holiday experiences and types of accommodation used by visitors, all help city marketers to decide how, when, where and which marketing tools should be used to reach which market segments. If secondary information on such statistical data is non-existent, city marketers can conduct forecasting studies, visitor surveys, product and price studies, sales research, performance monitoring studies and research on distribution network depending on the information required (Page, 1995; Middleton, 2001).

3.8. Conclusion

The competition among city destinations has become fiercer than ever with local authorities searching for most effective ways and methods of marketing their product offer. With more cities attempting to attract visitors in the international arena, the concept of urban destination hierarchies has been introduced distinguishing *'winners'* and *'losers'* of the city destination market. One of the main reasons of such fierce competition is the catalyst role of tourism, which, reflects itself in the focus on tourism-based projects and product development schemes under revitalisation schemes executed in various places across the world. While the economic deterioration caused by the decline of the manufacturing industries has been attempted to overcome with the improvement of service industries, post-industrial cities has started to put more emphasis on the issues such as living quality, destination image and collective marketing of urban areas.

This chapter looked into the emerging importance of city destination marketing in both real life applications and academic circles. One of the main outcomes of the analysis is that whatever the purpose of tourism development is *–i.e. economic, political or social reasons-*, marketing goals and objectives can only be brought into achievable targets through consistent and coherent strategic marketing plans. The utilisation of these plans require co-operation among sector stakeholders, who together construct local tourism management networks. The topics discussed in this chapter ranging from image marketing to marketing tools used by city destinations, and from leading city marketers to competitiveness of cities as tourism commodities, shapes the outline of Chapters 6 and 7, when the topics will be further examined in relation to the tourism sectors of the case studies of this research: Amsterdam, Istanbul and London.

CHAPTER 4. ISTANBUL: A GLOBAL CITY

4.1. Introduction

This chapter provides an introduction to Istanbul as an urban area. It is necessary to describe some important urban characteristics of the city, before its tourism sector is analysed as a component of the overall urban network in the following chapters. As mentioned earlier, tourism cannot be investigated in isolation from other urban facilities and services. Therefore, an outline of some general urban matters, facts and characteristics is thought to help establish a substantive background to the city and its tourism industry whose effective operation clearly is influenced by the functioning of other urban mechanisms.

However, it should be stressed here that, since the main focus of this investigation is the tourism sector of Istanbul, this introductory chapter is not as detailed as it may have been if the aim were to analyse this urban complex from a different research perspective with the major emphasis put on its history, economy or social and demographic substructures. This chapter only summarises some general urban characteristics and the evolution of Istanbul as an urban area with special interest in linking these urban features with the tourism sector and its functioning in the city.

The chapter first looks at the geography of Istanbul, which is considered to have determined its history strongly. The city where the first Christian Empire -*i.e. the Eastern Roman Empire*- was founded, later became the capital of the largest Islamic Empire in history; the Ottoman Empire. These great empires have inherited various historic sites and buildings, which now compose the heritage tourist offer of the city. The section, which provides some background to the history of the city, is, therefore, divided into three sections: the Roman and Byzantine Era, the Ottoman Era and the Republican era.

Following the history of the city, the socio-economic and demographic characteristics of Istanbul are summarised, followed by matters concerning the urbanisation of the city. The evolution of Istanbul as an urban area and its urban dilemmas and challenges are dealt with in later sections of the chapter, which concludes with some thoughts on the future of the city.

4.2. Geographical Situation of Istanbul

It is important to note that understanding the geographical characteristics of Istanbul is imperative before any planning and marketing strategies are drawn for the development of its tourism sector. Undoubtedly, the geography of any tourism destination is a crucial component of its tourism network. Without understanding of the geographic situation and characteristics of Istanbul, problem solving in matters like: the accessibility of the city; public transportation;

the allocation of green areas; the sites chosen for new tourism developments and recreational activities; seasonal fluctuations of visitor flows; and the zone planning of major tourist sites would lack in-depth analysis in approach.

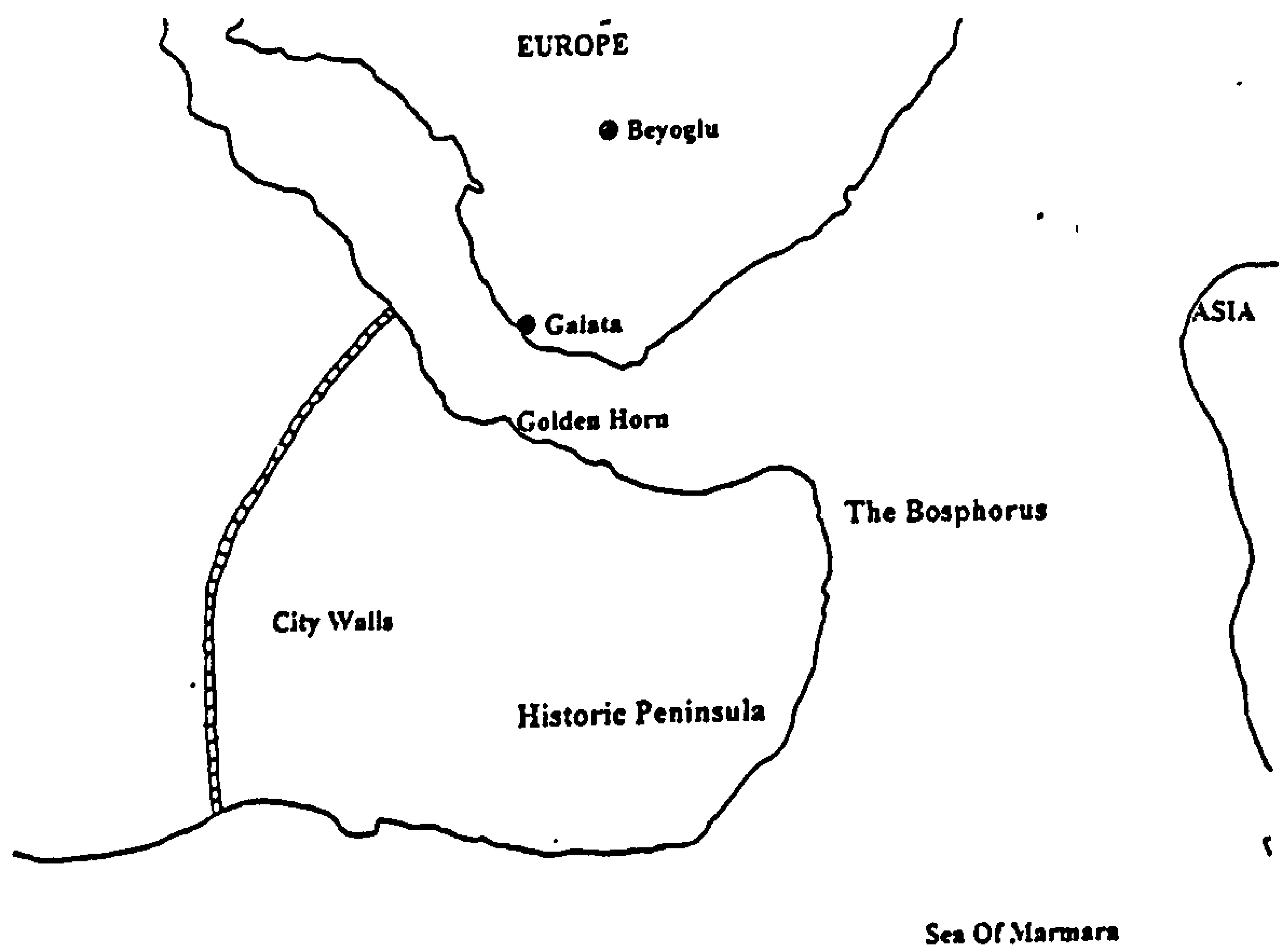
Therefore, putting the major emphasis on tourism of Istanbul, some unique geographic characteristics of the city are mentioned briefly in this section in order to establish an understanding of its place in the international tourism map. This will, consequently, provide a basis for the analysis of tourism zones and their emergence as major visitor spots combining numerous attractions, facilities and services in the city. Besides, a brief introduction to the geographical location of the city is also important to provide insight into its history and the urbanisation process, which are both investigated in the later sections of this chapter.

In fact, as it is the case for almost all major cities in the world, the transformation of small towns into major cities on trade and travel routes is strongly related to their geographical location with the advantage of being in a *'gateway'* position to other cities, countries and even to continents. Since the accessibility to wider geographical regions is one of the crucial pre-requisites for a city to earn the gateway status, the existence and effectiveness of varied transportation opportunities like sea-crossing, multiple road connections, railway networks and air traffic from/to other hub-destinations notably strengthen its importance as a global or world destination. If these gateway cities are found on waterfront areas, they also benefit from sea transportation, in addition to the provision of major road and railway connections to other areas. Some even have more than one airport in order to ease their accessibility from/to places across the world.

Istanbul is no exception. The peninsula where the city was founded initially explains why the city has retained its importance as a trade and business centre over centuries. This peninsula, which is now called the *Historic Peninsula,* is bordered by *'The Golden Horn'* and *'The Istanbul Strait'*, which divides Europe from Asia (*see Figure 4.1*). It is this superb location of Istanbul, which distinguishes the city not only from many others in its close vicinity, but also from other cities in the world. As it is repeatedly pointed out in the written promotional documents of local authorities, it is the only city in the world, which is found on two different continents. This unique location explains why it gradually emerged as a historic and cultural centre (*see also Appendix 3*).

The Istanbul Strait *-i.e. the Bosphorus-* not only joins the continents, but also connects the Black Sea to the inland sea of Marmara. While the city has grown on both shores of the Strait, a great portion of both residential and business dwelling areas lies in the European continent, which is divided into two parts by the Golden Horn. It is this natural harbour, which has played an important role both in assuring the security of the Historic Peninsula and in enabling the city to benefit from marine trade transactions since the very early days of human settlement. Today, the Golden Horn continues to serve as the major port to Istanbul.

Figure 4.1. A Map of Istanbul



Such a geographic location provides the city with unique scenery and atmosphere, but also endows it with unique topographical characteristics including habitat and climate. Although the average altitude of the city is no higher than 10 meters above sea level, Istanbul is known as the city founded on *'seven hills'*. These hills, which are spread along both sides of the Bosphorus, are now totally covered and even hidden behind high-rise buildings and business complexes. Still, the major public organisations like the Governor's Office and the Greater Municipality of Istanbul use the hills on their organisation logos as a landmark of the city. From the tourism point of view, the advantage of this topographic characteristic is that many hotels, restaurants and parks located on up-hill spots, benefit from beautiful scenery and a bird-eye view of the Strait and its shores.

The climate of Istanbul is quite changeable (*see Table 4.1*). The Bosphorus brings the cold north winds from Northern Europe and the warm winds of the Mediterranean together. Hence, while winters are cold in comparison to the southern regions of Turkey, but warmer than eastern Turkey, summers are not too hot, but pleasant (ITO, 1997). Air pollution in certain districts of the city is mainly a winter problem. Levels of pollution do not rise above accepted international standards during the summer months (IOBC, 1997).

Table 4.1. Average Monthly Temperature and Precipitation in Istanbul

	Temperature (in °C)	Precipitation (millimetres)	Average Number of Days with Precipitation
Annual	14.0	677.2	123.8
January	5.6	92.4	18.2
February	5.6	73.4	15.5
March	7.1	61.4	13.7
April	11.6	43.2	10.1
May	16.4	31.5	8.0
June	20.8	23.8	5.2
July	23.2	22.2	3.5
August	23.2	23.2	3.8
September	19.7	44.5	6.0
October	15.5	68.2	10.0
November	11.6	86.2	12.9
December	7.7	107.2	17.0

Source: DIE, (2000a).

Istanbul shows the characteristics of the Mediterranean habitat. Due to the changing climate and warm weather conditions, there are not many forests and green areas in the southern part of the city, which lies along the shore of the Marmara. The area covered by trees and bushes increases toward the Black Sea. The Belgrade Forest is the biggest green area, which is only used for recreational purposes today. There are some winter and hunting houses in the parks and forests of Istanbul, which were originally built for the use of the Ottoman Sultans and are transformed into museums, restaurants and social clubs for the use of local residents as well as visitors.

Within the borders of the greater Istanbul district, there are three lakes, two of which are situated on the European shore; the Terkos, Kucukcekmece and Buyukcekmece lakes. Since the last two of these lakes join the surrounding seas, they contain salty waters, hence are good resources for fishing and fish farming.

4.3. History of the City

As noted above, the exceptional geographic location of Istanbul explains why it was a highly preferred site for human settlement since the day its first inhabitants arrived. The Historic Peninsula was a perfectly secure location for habitation, since outsider attacks and invasion attempts had to cross the natural sea border drawn by the Golden Horn, the Marmara Sea and the Bosphorus.

Excavations in the hinterlands of the city justify the fact that human settlement in the area dates as far back as the Paleolithic period (Kuban, 1996). The Yarimburgaz Cave, which is considered to be an ideal open-air archive for archaeologists, shows evidence of the changes in climate and sea level, in addition to human and animal fossils preserved in its strata. The Cave and the some other localities such as Agacli, Gumusdere and Buyukcekmece also prove that continuous human settlement in Istanbul is not recent, since pre-historic hunting and carving tools like wooden mattocks were found in these areas in various excavations (Soysal, 1996).

Later settlements, which formed the nucleus of the city on the Historic Peninsula, were founded by the Megarians in the 7^{th} century BC. The city was named Byzantium after its founder and the leader of the Megarians, Byzas (TETOV, 1996). Since the foundation of Byzantium, the Historic Peninsula has never been abandoned by the citizens of the biggest empires of the civilisation history. Megarians were followed by the ancient Greeks, Eastern Romans, the Byzantine Empire and the Ottoman Empire until the foundation of the Republic of Turkey soon after the end of World War I.

In the following sections of this chapter, these empires are briefly investigated in order to provide some insight into the rich heritage and historic aspect of Istanbul's tourist product offer. Because of the tourism-related concept of the study, an emphasis is put on existing statues, monuments, palaces and heritage buildings from each era (*see also Appendix 4*).

4.3.1. The Roman and Byzantine Eras

The reasons why Byzantium was located in the Historic Peninsula by the Megarian colonists, are also the reasons why the Roman, Byzantine and Ottoman empires showed interest in adding the city to their ruled land: its advantageous and secure position between Europe and Asia, and consequently its importance as the main stop-over destination on the famous trade routes of such goods including textile products, precious stones, metals and even food. This also denotes why Byzantium was a huge city with an approximate number of 30,000 inhabitants and why the city has grown at a rapid pace throughout its history due to its premium position in communications and defence (Soysal, 1996).

Unfortunately, there are not many remaining buildings and sites left from this early era of Byzantium, as the later settlements of the Ottoman and Roman Empires covered the initial Megarian complexes, buildings and monuments. Since excavations to search the roots of the

Megarians in Istanbul would mean knocking down what is left from the later rulers of the city, historians, archaeologists and visitors with a special interest in history have no other option but to learn about the initial residents of Istanbul from historic documents.

Therefore, although it is known that the Megarians built a gymnasium, a harbour, several administration buildings, aqueducts, baths, and most famously, the Hippodrome where ceremonies and sports competitions were held, visitors are only shown the obscure locations of these sites in the Sultanahmet Square which is now under protection as an inner-city heritage site on the Historic Peninsula (TCKTB, 2004a).

During the legacy of the Megarians, Byzantium was captured by the Persians, Spartans, and the Macedonians. The insisting desire to invade the city shown by various neighbouring sovereigns forced the Megarians to join the ancient Greeks in 476 BC. Nevertheless, they refused to compromise their freedom and remained an allied, but an independent state. However, after being attacked by the Macedonians, Byzantium requested assistance from the Roman Empire in exchange, for which it accepted the protection of Rome. The outcome of the act of bequeathing Byzantium to Rome in 74 BC, made Byzantium completely subject to the Roman Empire.

The Roman Emperor Constantine I (324-37) proclaimed the city the new capital of the Eastern Roman Empire in 328. The city to which, first, the name Nea Roma and later, Constantinopolis was given *-i.e. after the Great Emperor Constantine who also introduced the Christian faith to the city-* became the most important cultural, artistic and, from time to time, political and economic centre of Christianity in the Medieval period (TETOV, 1996).

Soon after its announcement as the new capital of the Eastern Roman Empire, Constantinopolis became the true heir to the Roman legacy during the Medieval Age, even surpassing the importance of Rome, which was the sole power point of the Empire until the 330s. In fact, following its new status as a capital city, Constantinopolis became the largest and premier trade centre of the Empire, as the products and goods of India, Africa, Europe and the Mediterranean region were exchanged in its harbour by tradesmen and merchants.

In 395, the Roman Empire was divided in two. The Western Roman Empire collapsed in the late 5th century, but the Eastern Roman Empire, so-called the Byzantine Empire by modern historians whose the capital remained Constantinopolis until its abolition, survived for more than 1,000 years. Constantinopolis reached a number of 200,000 residents mainly due to its capital status, which clearly strengthened its image as an administrative and religious centre.

The acceptance of Christianity by the Eastern Romans, left its mark on the city with the sudden upsurge of various churches and monasteries in the Historic Peninsula. Among those, St. Irene Church, St. Akkios Church and St. Mokios Church still stand on their original location today (Soysal, 1996).

In addition to the earlier examples of Roman architecture in the city, the Hagia Sophia Church, which was built during the reign of Iustinianus I, is deservedly one of the well-known landmarks of the city with its unique and impressive architecture. During the era when the church was built, the population of the city reached around 400,000 and, the cosmopolitan structure of Constantinopolis was enriched with the construction of new baths, basilicas, churches and monasteries.

More historic sites and buildings remain in Istanbul from the last phase of the Byzantine era - *i.e. the period between the 11^{th} century and the 15^{th}-*. The Blakhernai Palace *-i.e. known as the Tekfur Palace today-*, Lips Monastery (Fenari Isa Mosque), Myraleion Monastery (Mesih Pasa Mosque), Pantepoptes Monastery (Old Imaret Mosque) and Pantokrator Church (Zeyrek Mosque) were all built during the 11^{th} century and now serve as mosques to the Muslim community living in the city (Soysal, 1996).

Constantinopolis, even during the Medieval Age, was a place of interest for visitors. As a trade centre, tradesmen and merchants travelled into the city in order to exchange their products with others coming from as long distances as the Far East. The city was also known as an *'art city'*, as craftsmen who had opportunities to exhibit statues, miniatures, frescos, carved metals and ivory, were well respected. Similarly, having a university in the 5^{th} century at which courses in the fields of applied science and philosophy were taught, the city was also an *'education centre'*. The university in which, the theories developed by Plato and Aristotle were taught, attracted students from the Middle East and Europe (Soysal, 1996).

The decline of the Empire came with attacks by the Venetian and the Crusade armies. The city lost control over the traffic through the Bosphorus and its wealth and prosperity by the 14^{th} century. While the population of the city reduced to 50,000, its role as the economic and political capital of the Byzantine Empire had been severely deteriorated long before the Ottomans succeeded in capturing the city in 1453 (ITO, 1997).

After the 475-year-long reign of the Ottoman Empire, the Roman and Byzantine characteristic of Istanbul had almost disappeared. Of the approximate 400 Byzantine churches and monasteries, only fifty still exist today. The majority of these churches were transformed into mosques. Two of them, including The Panayia Muhliotissa Church, are still used by the Christian community living in the city. St Irene Church was transformed into the Turkish Imperial Museum. One of the most important achievements of Istanbul as a former capital of the Roman and Byzantine Empires, is that it has managed to retain its status as the official residence of the Greek Orthodox Patriarchate from the Roman era until the present day.

4.3.2. The Ottoman Era

The Ottoman Sultan Mehmed II, who envisioned that the Byzantine Empire could no longer protect Constantinopolis, succeeded in capturing the city in 1453. By 1454, the capital of the Ottoman Empire had already moved from Edirne to Constantinopolis. Since the borders of the Ottoman Empire were spread across Europe and Asia, Constantinopolis was an ideal location for the capital, which was at the heart of the whole Empire. Therefore, it did not take too long before the city regained its importance as a trade, administrative and cultural centre during the reign of the Ottoman Sultans.

While the city retained its Roman name *'Constantinopolis'* during the first few decades of the Ottoman reign, the Greek phrase *'eis ten polin'* meaning *'to the city'* was transformed through such variations as Stimbol, Estanbul and Istambol by the new Muslim residents of the city, before it took its final format as *'Istanbul'* (TETOV, 1996). In fact, it was not only the name of the city, which had gone through the transformation process, but so had many of its characteristics, which were influenced by the newcoming Turkish residents, their traditions, culture and religion.

The importance of Istanbul as a religious centre was further enhanced during the Ottoman Era. In addition to being the official residence of the Greek Patriarchate, the arrival of the Ottoman Empire meant the introduction of Islamic culture to the atmosphere of the city. Moreover, soon after Istanbul became the capital of the Ottoman Empire, it also positioned itself as the religion, culture and art centre of the Islamic world, as the Empire was the most powerful Islamic state in the world at the time. This status was further enhanced when, in 1517, the Ottoman Sultans were accepted to be the Caliphs *-i.e. the religious chief of Islam-* by the worldwide Muslim community. Hence, in addition to being the capital of the Empire, Istanbul was also the centre of the Caliphate. The achievement of this spiritual and sacred status by the Sultans was due to the take over of the Holy Items *-i.e. the hand-written Koran, the footprint of the Prophet Mohammed, the sword of the Prophet, etc.-* from the Middle East to Istanbul. These items are still on display at the Topkapi Palace Museum, which was once the residence of the Sultans.

As soon as Istanbul was occupied by the Ottoman Empire, the subsequent Sultans worked towards revitalising the city, which had economically and socially deteriorated during the last phase of the Byzantine era. While the existing buildings and sites such as city walls, churches and commercial buildings were repaired and restored, new mosques, fountains, aqueducts, institutional complexes including shops, schools and baths were built in the unique Ottoman architecture. The above-mentioned Topkapi Palace, the Sultanahmet Mosque and the Grand Bazaar are only some of the most visited tourist attractions of today, which were built during the Ottoman era.

The construction of multi-purpose complexes embracing shopping malls, mosques and schools under the same roof, revitalised the economic life of Istanbul. Consequently, the population of the city increased from 40-50 thousand to 120 thousand within a quarter of the century. This was also due to a conscious settlement policy, which encouraged inward migration (TETOV, 1996).

According to Soysal (1996), Istanbul was the most densely populated city in the world at the start of the 16th century. With 400,000 residents living in the Historic Peninsula, the population of Istanbul was twice that of Paris and was five times more than the population of Venice. Once more, the Golden Horn was the busiest harbour in the world, which helped Istanbul to become one of the first cosmopolitan cities in the region. By the end of the 17th century, new settlements started to emerge outside the city walls and on the shores of the Bosphorus, since the land on the Historic Peninsula was already fully occupied. This was followed by new districts like Beyoglu and Galata emerging as residential zones on the European shore of the Strait and, later, becoming the most popular areas for recreation, housing and business settlements (*see Figure 4.1*).

The influence of the Ottoman Empire on Istanbul and its architecture is indisputable and, can be traced through various historic sites and buildings built during the different phases of the Empire, starting from the mid-15th century to the beginning of the 20th century. For instance, while the palaces, mosques and indoor shopping complexes built in the first two centuries of the Empire's reign reflect the unique Ottoman architecture, those built after the 17th century provide some evidence of the influence of the Renaissance had on architectural style.

The more powerful influences of the Western world came in the 19th century, which, as the historians refer to it, was *'the beginning of the end'* for the Ottoman Empire. In 1839, the Tanzimat Fermani -*i.e. the Declaration for Reformations*-, which provided the roots for developing a new political system to rule the country with laws and legislation rather than a sole monarchy, was announced by some of the leading bureaucrats among the Sultan's supervisors and commanders. The Declaration suggested radical changes in all of the state organisations and constitutions, while laws and regulations were to be upgraded to bring them in line with the European ones.

Following the Declaration, the whole Empire, which spread from Eastern Europe to the Middle East, went through an enormous transformation process. Istanbul drew the attention of the reformers, who wanted to symbolise the modernisation process with the vibrant and prosperous atmosphere of the capital city. Hence, despite strict limits on budget allocations and public expenditure due to the then economic crisis, urban plans and development projects were prepared for Istanbul in order to revive the city as a modern cosmopolitan such as its European counterparts.

During this period, one of the first underground service lines in the world *-i.e. Tunel-* was built in Istanbul. The city was connected to Europe through a railway network and served as the final stop to the Orient Express, which passed through various European destinations before reaching Istanbul, and brought wealthy and educated European visitors to explore the mystic atmosphere of Istanbul. There were also efforts to connect the new districts like Beyoglu and Galata with the Historic Peninsula by building bridges over the Golden Horn. Such efforts helped Beyoglu to become an entertainment centre of Istanbul with theatres, cinemas, restaurants, hotels, night-clubs and cafes resembling the vibrant life of Paris. Today, the district still retains its importance as a shopping, entertainment and culture centre and is a well-known meeting point for both visitors and residents of Istanbul (TCKTB, 2004a).

The collapse brought about by economic stagnation and repeated defeat in wars had prepared the ground for the end of the Ottoman Empire at the beginning of the 20^{th} century. Nevertheless, the influence of the Empire on Istanbul is still evident in the city. The Ottomans bequeathed various buildings such as palaces *-i.e. the Dolmabahce Palace, the Beylerbeyi Palace, the Ciragan Palace, the Yildiz Palace-*, hunting and winter houses of Sultans *-i.e. Emirgan Konagi-*, mosques *-i.e. Sultanahment Mosque, Suleymaniye Mosque-*, which all strengthen the historic component of the tourism offer of Istanbul.

4.3.3. Istanbul in the Republican Era: Today

The decline of the Ottoman Empire at the beginning of the 20^{th} century resulted in the loss of its hegemony and influence especially over the states in Europe. The partitioning of the Empire was so severe that the whole burden of the Ottoman state was actually dropped down to the borders of Istanbul by the end of World War I. When the city was occupied by the

Allied Powers in 1920, the national resistance movement had already started in Eastern Turkey.

The leader of the national resistance movement, Mustafa Kemal Ataturk, managed to inspire the Turkish people to fight for their land against various European countries, which had already shared Anatolia -*i.e. the main land of Turkey*- among each other with the aim of establishing colonies in this superbly located geographical area. Following the Independence War and fierce battles between the opposing sides, Ataturk and his commanders succeeded in forming the Turkish National Assembly in 1920 and, founded the Republic of Turkey in 1923.

Istanbul was intensely affected by the new Republic and the decline of the Ottoman Empire. To start with, the city was no longer the official residence of the Sultan, who was also the Caliph, and his family. Since the main aim of the Assembly was to eliminate any possible threats to establishing a republic, the sultanate was abolished, the legal status of the Ottoman Empire was nullified and the last Ottoman Sultan and his family were forced to emigrate. Secondly, the capital of the new country was declared as Ankara in 1923. Hence, within the first few years of the Republican era, Istanbul entered a stagnant period for the first time in its history, while Ankara drew the attention of both the founders and the citizens of the new Republic.

Nevertheless, the effects of the radical reforms introduced by the founder of the new Republic in the social, political and economic fields -*i.e. the use of the Latin alphabet and measurement units instead of Arabic ones*- had influenced the city. Istanbul had always been a cosmopolitan city and was arguably the first city to adapt itself to such contemporary reforms, and the every-day life they induced. Since the inward migration to Istanbul from rural areas was almost non-existent at the time, there was a remarkable number of residents who were educated and familiar with European culture and traditions. Hence, these reforms enriched the cultural and economic life of the city in a similar way that the Renaissance movement had an impact on Istanbul and its residents in the 17th century, bringing the cultural prosperity of the city to the same level of its European counterparts' once again (Kiray, 1998).

Within the first 20 years of the Republican era, reforms were continued in Turkey in the areas as diverse as justice, politics, education and defence. However, the transformation from agriculture- to production-based industry was only accomplished after the 1950s. The effects of industrialisation, therefore, were only apparent after that decade in urban areas like Istanbul where technology transfers from the developed countries to produce industrial goods and products meant more factories and warehouses in inner-city areas. Although the local authorities of the city had been preparing urban infrastructure development plans since the 1930s, the city was not ready to cope with the sudden increase in the population, which had reached 1 million by the end of the 1940s.

By 1970, the population of the city was 2.5 million. Istanbul was giving clear signs even from those early days of the industrialisation era that the city would be the major centre of trade and business in Turkey. In fact, today, Istanbul is not only the most important industry, commerce, finance and services centre of Turkey, but also the foremost city in the educational, cultural and artistic spheres. Its diverse facilities for communication, transportation and accommodation industries also ensure that Istanbul remains one of the most important tourism destinations in the country. The opportunities the city offers to its visitors include an experience of natural beauty and a rich historical heritage in a hectic, but also a mystic metropolitan area.

To summarise, the Republican era has improved the already rich-in-heritage city with contemporary transportation and communication networks, conference and exhibition halls, branches of various international hotel chains, sports complexes, culture centres and shopping facilities. While all these tourism-related aspects of the city are investigated in Chapters 6 and 7, here in the following sections, the socio-economic and demographic characteristics and the urbanisation process of the city are presented in further detail.

4.4. Socio-Economic Structure of Istanbul

Following the start of the *'industrialisation era'* in the 1950s, Istanbul has further reinforced its *'major trade centre'* status in Turkey with headquarters of all kinds of business organisations emerging and operating in the sectors ranging from automotive to finance. Therefore, although the city lost its reign as the capital city in the Republican era, its exceptional geographic location with improved accessibility for trade transactions has meant the city has remained the trade capital of the country. Evidently, such emphasis on trade has brought along new entrepreneurs and employees to choose Istanbul as a place of residence and work which has livened up the cosmopolitan atmosphere of the city and strengthened its inherited cultural and heritage prosperity with an extensive variety of recreation activities offered to both inhabitants and visitors.

As Sonmez (1996a) notes, by the year 1975, Istanbul's share in added value of the Turkish manufacturing industries was as high as 34%. In 1994, almost half of the 500 largest industrial firms operating in Turkey were members of the Istanbul Chamber of Commerce and all had their headquarters located in the city. As the author further notes, some of these firms, especially the ones operating in the heavy manufacturing and construction industries, have their factories, warehouses and production outlets located outside Istanbul and in places as far as Eastern Turkey. Yet they still favour Istanbul as a place for establishing their headquarters and management teams, as the city provides effective and appropriate communication networks, which make it easier to grab the attention of both customer and labour markets.

In 1998, while the members of the Istanbul Chamber of Commerce accounted for 30% of the overall registered entrepreneurs and investors in the whole country, 30% of all the bank branches in Turkey were found in the city. In 2001, the contribution of the city to the overall GDP (Gross Domestic Product) was 21.5% (*see Table 4.2*). The per capita GDP in the city was almost 47% higher than the national average (*see Table 4.3*).

In terms of import and export transactions, Istanbul stands out from the rest of the country. Due to the presence of many major national and international organisations and their headquarters in the city, it is not surprising that the 50% and 40% of all national export and import transactions respectively were made by the organisations located in the city in 1998 (TCIV, 2000).

While all these figures denote the importance of Istanbul in the national economy, since the 1980s there has been a shift from manufacturing industries to service industries in the city. Such a move was due to the high costs of land in central areas and the opportunity to manage and direct production outlets located in the outskirts of urban areas as expeditious technological developments in the field of communication mitigate probable obstacles that long-distance management used to imply. In Istanbul, another reason for the move of the manufacturing industry from the urban core was the government incentives given to the adjacent cities to decentralise industrialisation in the city (Erkip, 2000).

Table 4.2. Gross Domestic Product by Istanbul
At 1987 prices (*Billion TL, ** %)

Year	*Total Value for Turkey**	*Annual Growth Rate***	*GDP in Istanbul**	*Share of Istanbul in the Total***	*Growth Rate in Istanbul***
1995	97,888	7.2	21,288	**21.7**	15.0
1996	104,745	7.0	22,843	**21.8**	7.3
1998	116,114	3.1	25,650	**22.1**	1.3
2001	109,885	-7.5	23,607	**21.5**	-10.2

Source: DIE (2000a and 2003).

Table 4.3. Per Capita Gross Domestic Product in Istanbul (at Current Prices, in US$)

Year	*GDP per Person*	*Change*
1989	3,260	-
1990	4,303	31.9
1991	4,223	-1.9
1992	4,151	-1.8
1993	4,477	7.8
1994	3,111	-30.52
1995	4,037	29.7
1996	4,286	6.1
1997	4,749	10.8
1998	4,658	-2.0
2001	3,063	-

Source: DIE (2000b and 2003).

Some outer districts of the city still embrace showrooms and exhibition galleries of firms producing manufacturing goods. More central locations are filled with service sector organisations including accommodation outlets, retailers, consultancy firms, banks and cultural and recreation activity providers. Nevertheless, it was only recently that the local authorities of Istanbul managed to locate an amalgamation of the manufacturing organisations, their warehouses, production outlets and showrooms in so-called *'industrial zones'* in the outskirts of the urban area.

Another remarkable effect of the industrialisation era had on the urban fabric before its disappearance in the 1990s, is the headquarters of major national and international organisations in the form of skyscrapers in various districts of Istanbul whose modern architecture contrast with the historic characteristics of the city. Indeed, such conflicting factors of the city include: modern shopping malls and historic indoor shopping centres; traditional and strict cultural values and post-modern arts events; contemporary architecture and the Ottoman houses and; the luxury villas along the Bosphorus and shanty towns, which collide within the urban network. While such factors are integrated into the chaotic way of life of the residents, they can also be considered an experience for visitors of the everyday functioning and dynamic atmosphere of the city.

The more harmful effect of the industrialisation era was, however, the emergence of new residential and industrial zones both on the European and Asian shores of the city. While these rather disorganised areas were encouraged by the improved transportation facilities and the two bridges built over the Istanbul Strait, the local authorities were unable to provide sufficient infrastructure facilities within the ever widening borders of the Greater City and were also unable to protect the city from squatter settlements formed by the unskilled and cheap labour force pouring into the city especially from the Northern, Central and Eastern regions of Turkey.

While the city continues to grow as the biggest metropolitan area of Turkey, and also as one of the biggest cities in the world, the deteriorated urban and natural environment, unplanned housing and office settlements, the increased rate of unemployment, inadequate infrastructure facilities and the growth of derelict buildings and sites in the inner-city areas remain the major disadvantages of Istanbul.

The city also suffers from a history of marked income inequality among its different social groups. The one-off research held in 1994 shows that Istanbul consumes 27% of the total income of the country. But the research also pinpoints that the distribution of income between the low- and high-income groups of the Istanbul residents is extremely unfair (Sonmez, 1997). 80% of the city's income is controlled by 40% of its residents who fall into the high-income group, leaving 20% of the income to be shared by the rest. In fact, according to ITO (1997), only 20% of the city's population play an important role in changing the form of consumption and demand in the city. As one might infer, such an unequal distribution of income would explain why there is an immoderate difference in the *'consumption attitudes and behaviour'* among different social groups living in the city.

Following the entry of Turkey into a customs union with Europe, which has opened a new phase in the economic history of the city together with the effects of global economic trends, freedom in foreign trade and the flow of international funds and movement of capital, Istanbul has become an international business centre at the heart of the Middle East, the Black Sea, the Caucasus and the Balkans. Furthermore, as stressed by IOBC (1997), the city now strives for the role of a ***'global city'*** where intensive economic and social interaction takes place.

To sum up, the share of Istanbul share in the gross domestic revenue is growing. Its power as a magnet for the attraction of population is increasing, too. Its urban revenue is reaching extraordinary proportions and the service sector in the city is acquiring greater importance. Finally and most importantly, Istanbul is becoming the centre, in which the main decisions regarding national economy are taken (Sonmez, 1996a; DIE, 2003).

4.5. Demographic Characteristics and Population of Istanbul

As stated in Section 4.3, throughout its history, Istanbul has always been a major trade centre located in between continents, hence has been subject to high numbers of residents living on the Historic Peninsula since as early as the Roman era. Still, according to Goodsell (1985), by the year 1832, the population of the city was only 400,000. With a sudden increase in inward migration, the population of the city reached 700,000 in 1877. The census held in 1900 showed that there were nearly 1 million people living in the city at the start of the 20th century. The same census also showed that the majority of the population was made up of the Turkish community with a share of 1/3 of the whole population. However, the minority groups such as the Greek, Armenian, Bulgarian, Jewish, and other Catholic and Protestant communities were twice that of the Turkish population. In those years, following the Turks, the Greeks and Armenians were the second and third biggest ethnic groups respectively residing in the city.

In other words, at the end of the 19th century, the main distinguishing feature of Istanbul was the plurality of nations, languages and religions which all gave rise to a cosmopolitan way of life. Nevertheless, following World War I and the foundation of the Republic of Turkey in 1923, the minority population dropped intensively making the Turks the majority at 68% of the population. There had also been a remarkable reduction in the overall population of the city as a result of war casualties, the loss of civilians, the emigration of Turks to other regions, and the abandonment of the city by minority groups. Thus, the population of the city fell from 1,200,000 in 1922 to 691,000 in 1927 (ITO, 1997).

From 1930, however, the population of Istanbul has been increasing unceasingly (*see Table 4.4*). The census figures show that the population of the city grew from 860,558 residents in 1945 to just over 1 million in 1950 (Kilincaslan, 1996). As Sonmez (1996a, p.44) emphasises, the major population explosion came after 1950 and especially during the periods of 1950-55 and 1970-75 when the annual growth rate was at its peak levels. The author explains this by the exceptional rise of migration and population growth during these years with the mechanisation in agriculture, the movement of surplus population towards cities and an increasing demand for labour in the rapidly developing industrial sector in Istanbul. Thus, the population of Istanbul grew from 1.4 million residents in 1960 to 7.3 million in 1990 with the annual rate of growth fluctuated between 40-50 per thousand between these years (*see Table 4.4*).

When the population of Istanbul was nearly 5 million in 1980, the population density was 830 persons per square kilometre, which later rose to 1280 in 1990 (Akten, 1994 and DIE, 2000a). This figure shows that the city is the most densely populated urban area in the whole country. The reason for such an overcrowded population is mainly the inward migration and the concentration of residential settlements on the European shore. In 1990, only 32% of the population lived on the Asian side of the Bosphorus. However, the bridges built over the Strait and the movement of the manufacturing industries to the Eastern outskirts of Istanbul on the

Asian part have made these areas more popular over the last few decades. It is assumed that the proportion of total inhabitants shared between the two opposing shores may be narrowed down further within the next few decades in favour of the Asian shore (Sonmez, 1996a). While the traditional superiority of the European side would continue to attract more commercial and luxury residential settlements, the Asian shore is preferred by many businesses including various hypermarkets in addition to the swelling housing settlements in the forms of both luxury villas and apartment blocks.

Table 4.4. The Population of Istanbul from 1927 to 1997

Year	Population of Turkey	Population of Istanbul	Share of Istanbul in Total (%)
1927	13,648,270	691,000	5.0
1935	16,158,018	741,000	4.5
1940	17,820,950	794,000	4.4
1950	20,947,188	1,010,000	4.8
1960	27,754,820	1,466,535	5.2
1970	35,605,176	2,500,000	7.1
1980	45,217,556	4,741,890	10.7
1990	56,473,035	7,309,190	13.0
1997	62,865,574	9,198,809	14.6
2000	67,844,903	10,033,478	14.7

Source: Akten, (1994) and DIE, (2000a and 2001).

To conclude, the population of the city is continuing to increase and, inward-migration generating from various regions of the country is ongoing. The rate of net immigration to Istanbul, which deducts outward migration from the total amount of new residents, was 108 ‰ in 1990. Although the overall increased rate of population has recently started to decrease slowly, according to DIE (2000a), the annual increase rate of population was 34.54‰ in 1997. Therefore, it can be argued that the economic and social problems of Istanbul mainly stem from: (1) the widening gap between the residents of Istanbul who belong to different social classes and, (2) the difficulties confronted in attempting to house and feed the migrants who have pinned their hopes on Istanbul, and to integrate them into the urban scene (Sonmez, 1996a).

4.6. Urbanisation in Istanbul

As discussed in the previous section, when compared to other European and Asian towns and cities, Istanbul has always been a large city with regard to number of residents. At the turn of the 5th century, the city reached a population of 100,000 exceeding the population of Rome, which was the capital of the Roman Empire at the time. Similarly, by the end of the 17th century, the population of Istanbul was around 800,000 which was, again, more than its European counterparts' including London and Paris (TETOV, 1996). Even during those early days, the city was a large settlement with fascinating buildings, sites and monuments built on the Historic Peninsula and within the borders outlined by city walls, which all affirmed its role as a *'place of importance'* and, in other words, gave Istanbul *'an urban look'*. However, it can be argued that the evolution of Istanbul as an urban area in relation to its more contemporary achievements, coincides with the last phase of the Ottoman Empire.

4.6.1. The Evolution of Istanbul as an Urban Area

The reforms introduced in 1839 in the fields ranging from justice to the military, from education to arts, which were followed by the openness of the Ottoman Empire to the Western World, induced a new way of life in Istanbul. The Western-style life of the 19th century reflected itself in the architecture of the city and in the cultural activities experienced by its multi-national inhabitants. The façade of the city with traditional Ottoman architecture had flourished with new buildings in a baroque-style emerging outside the Historic Peninsula, especially on the opposite shore of the Golden Horn and in places like Galata and Beyoglu (*see Figure 4.1*). The first of these new districts, Galata became a major financial centre with the branches of international banks, brokers and accounting firms, while Beyoglu where the European consulate offices were being built, became the culture and art centre of the city with the emergence of new shops, hotels, theatres, cabarets and restaurants.

In the same century, Istanbul was also going through a transformation of infrastructure facilities. The bridges over the Golden Horn were built to connect the Historic Peninsula with the new centres of Beyoglu and Galata. Railroads, port facilities and train stations were built to ease transportation within the city and to unite the settlement areas divided by both the Istanbul Strait and the Golden Horn (Soysal, 1996). By the year 1850, the public corporation called Sirket-i Hayriye was running scheduled ferry services between the shores of the Strait. Toward the end of the 19th century, Istanbul had one of the first underground lines of the world -*i.e. Tunel*-, which is still in use. At the time, main public transportation was still carried out by regular horse-drawn tramway services. However, the two main train stations of the city, one built on each shore of the Strait, were already running train services to other nearby urban areas in 1873. By the turn of the century, the surrounding areas of these main train stations, which were called the Sirkeci, and the Haydarpasa Stations, were emerging as the major business and trade districts of Istanbul (TETOV, 1996).

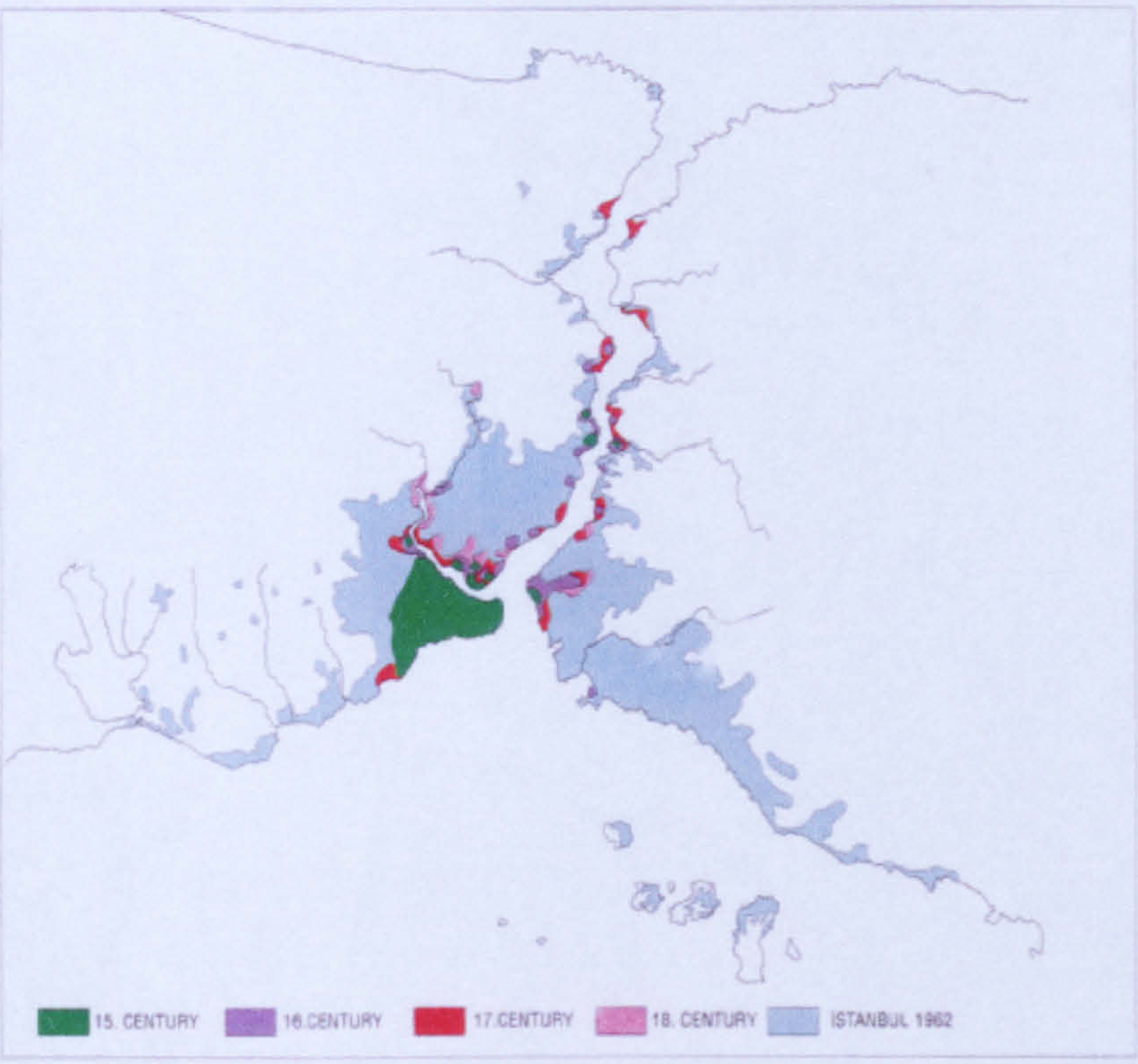
Although initial efforts to establish a municipal organisation for Istanbul date as far back as to 1845, the municipality of Istanbul, called Sehremaneti, was set up in 1855. The municipality, whose organisational structure was adopted from European examples, divided the city into fourteen municipal districts. The results of the 1885-86 census showed that the mostly populated municipal districts were Beyazit, Samatya and Fatih (ITO, 1997). These districts which were mainly along the shores of the Golden Horn were the biggest, as the industrialisation movement started at the end of the 18th century, had filled the vacant sites on the banks of this natural harbour with new business settlements in the form of handicraft production outlets. By 1930, these areas were, again, the first districts of Istanbul to encounter factories and warehouses of heavy industry (TETOV, 1996).

As a result, at the start of the 20th century, the Historic Peninsula had already gone into decline in terms of its appeal for residential settlements, while the newly emerged districts on the European shore like Beyoglu were becoming more popular with multi-floor apartment blocks. Yet the area within the city walls was still the centre for public administration, as it was the site for the headquarters of many public organisations including various ministries. But the changing commercial structure and new trends in residential settlements gave rise to a dual structure of the city with two major centres; the Historic Peninsula at one end, and Beyoglu at the other.

In fact, with modern shops, commercial settlements and apartment blocks built for residential purposes, Galata and Beyoglu became the modern core of the city providing links to the Western world. The Historic Peninsula, on the other hand, continued to retain its importance as an administration centre. While Beyoglu was characterised by a rise in population and by its appeal for upper class members of the society, the area within the walls witnessed a decline in terms of both its population and social status. Still, since the major transactions were taking place within the city itself and from the Historic Peninsula to Beyoglu, there was no great increase in the population of the city as a whole at the time (Kuban, 1996).

Moreover, despite the fact that the city has always been an important centre of trade and culture, the urban settlements in Istanbul were not widely spread across today's extensive borders of the Greater Istanbul until the 1960s (*see Figure 4.2*). In addition to the Historic Peninsula, urban growth was limited to a few areas along the seashore of both sides of the Bosphorus. Hence, while residential apartment blocks were springing up in areas like Beyoglu, Galata and Kadikoy, the city retained its numerous green areas, parks and even forests scattered along the banks of the Strait where there were only some small settlements consisting of fishing villages and summer-houses of upper-class society (Tumertekin, 1997).

Figure 4.2. Development of Istanbul from the 15th to the 18th Century

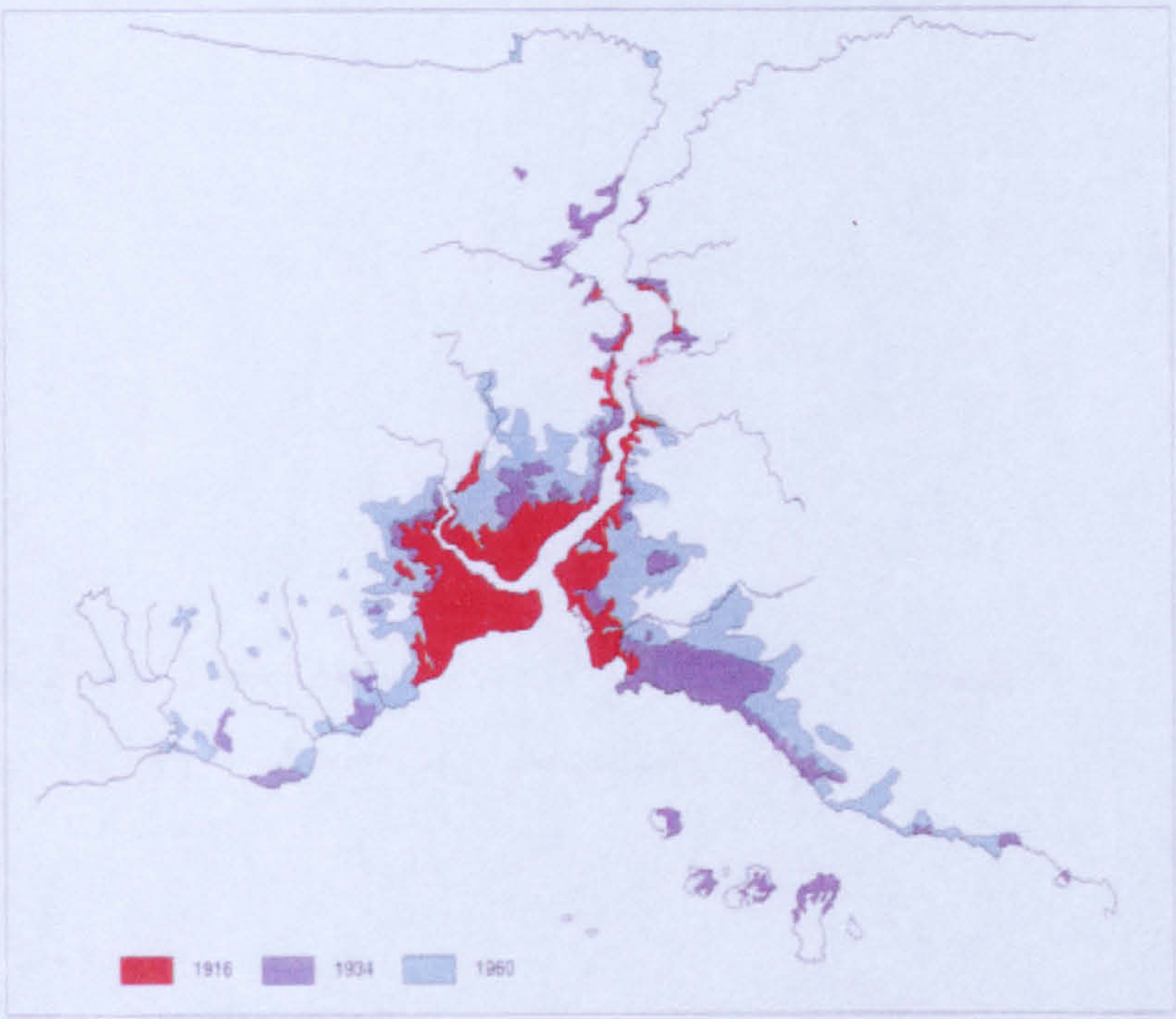


Source: Kuban, (1996), p.37.

From the 1960s, however, the city began to spread out in all directions (*see Figure 4.3*). The industrialisation era fostered inward migration to the city and caused more apartment constructions to replace green areas, parks and vacant sites. In line with more residential settlements, shanty towns and office complexes started to spread due to industrialisation of the environs of the city. These developments induced rapid population growth. By 1970, the population of the city was around 2,5 million of whom the forty per cent were living in squatter settlements (TETOV, 1996).

With the opening of the first Bosphorus Bridge over the Istanbul Strait in 1973, the diffusion of residents in search of new areas to settle either in the form of high-rise apartment blocks or as squatter settlements, was boosted. The Bridge became the central artery for the inner-city transportation easing access to central areas from the localities, which were once considered to be the outskirts of Istanbul. The move to expand in all directions was enormous and uncontrollable. The major pressure from the steadily increasing population was first felt on the European shore more than on the Asian shore, as the high density of new settlements increased at a rapid pace in areas like Beyoglu, Taksim, Sisli and Karakoy.

Figure 4.3. Development of Istanbul in the 20th Century



Source: Kuban, (1996), p.37.

Today, Istanbul still continues to expand its borders with new vacant areas occupied by housing and office settlements every year. This is mainly because the increase in population has not ceased, although the increase ratio seems to be reducing over the last decade. The city now spreads across 60 km on the Asiatic side, 40 to 50 km on the European side and stretches 20 km along the waterfront of the Istanbul Strait. New settlements long ago extended beyond municipal boundaries, which make the provision of efficient infrastructure services across the city limits extremely difficult (Tumertekin, 1996, p.16).

Among the 24 boroughs within the borders of Greater Istanbul, only four are actually outside the municipality borders today. The boroughs of Istanbul for which the Greater Municipality is responsible are; Sisli, Eminonu, Fatih, Beyoglu, Besiktas, Eyup, Zeytinburnu, Kadikoy, Bayrampasa, Uskudar, Sariyer, Beykoz, Adalar, Gaziosmanpasa, Kucuk Cekmece, Bakirkoy, Kartal, Pendik, Umraniye and Kagithane. The other four boroughs; Buyuk Cekmece, Catalca, Silivri and Sile are all located within the vicinity of Istanbul composing its hinterland (Ozbay, 1999).

What is so unique to Istanbul as an urban area, is that, of all these boroughs, one cannot cite any borough or district as the centre of the city. As Tumertekin (1996) stresses, the urban growth of Istanbul fits into the theory of *'multi-nuclear growth'*. While the city was extending its borders in all directions, new districts were emerging with new shopping centres, business complexes and housing settlements, which, as a result, gave each district a central characteristic. As Kiray (1998) notes, Eminonu, the borough on the Historic Peninsula, still retains its importance as a business and administration centre. Since the area is also rich in heritage, it is also where the concentration of visitor flows takes place.

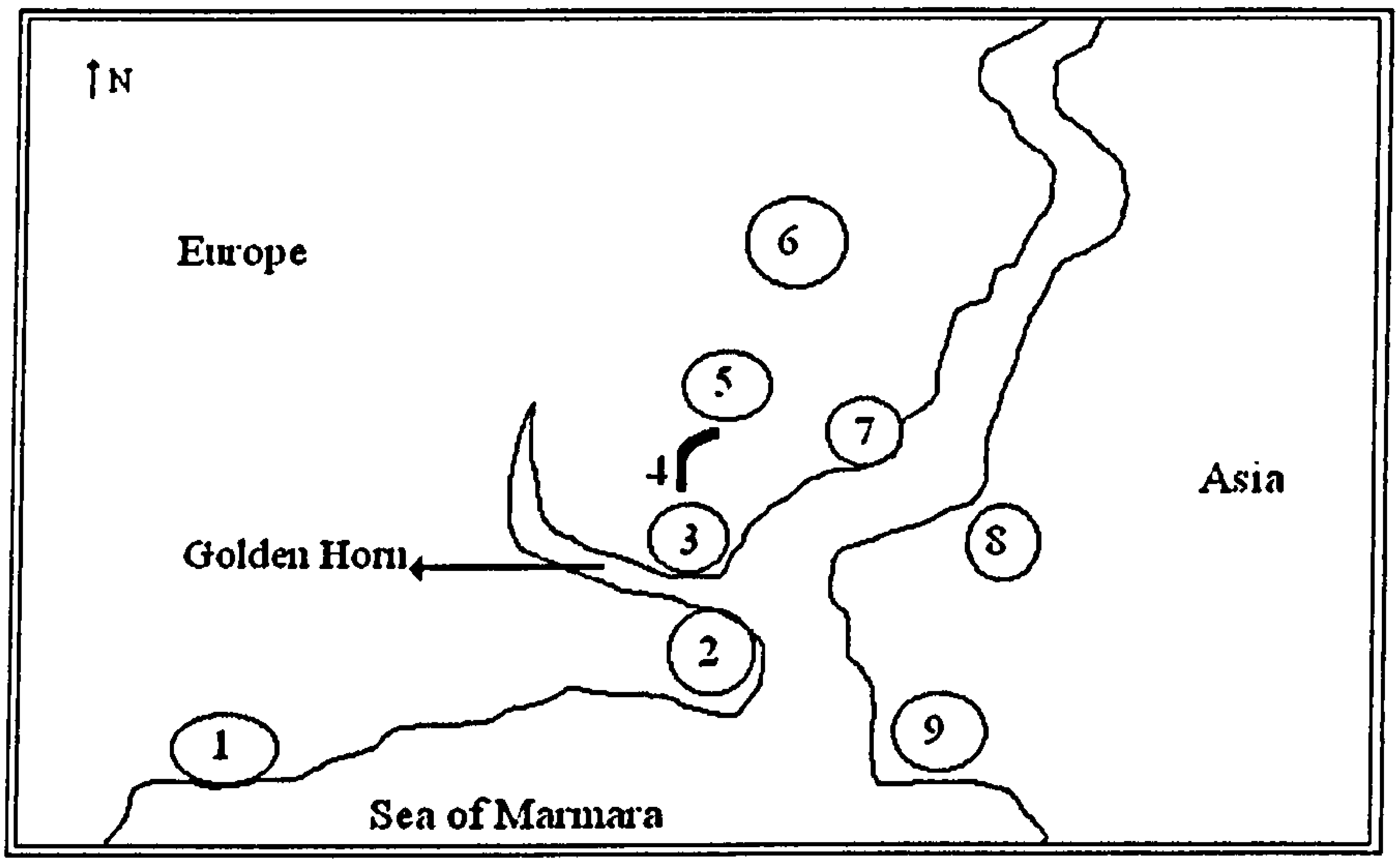
Beyoglu, Sisli, Karakoy and Kadikoy, which were the initial localities preferred for human settlements outside the city walls, have also become important business centres through time. The main production outlets of the manufacturing industries have long ago moved outside these boroughs where vacant urban land is expensive and sparse. Still, these boroughs continue to be the centres of business control mechanisms, as the headquarters with top management teams and the main branches of major organisations have settled in these areas. In addition to financial service providers such as banks, stock exchange brokers and accounting organisations, the organisations representing other sectors like media organisations, the main offices of public authorities, accommodation outlets, major culture and art venues, shopping malls, transportation and tele-communication firms have all been established in one of these boroughs.

Within the borders of these boroughs and some of the others, Tumertekin (1997) lists nine different *'business zones'*. These are Eminonu, Karakoy (Galata), Taksim-Istiklal Caddesi (Beyoglu), Kadikoy, Osmanbey, Besiktas, Aksaray, Mecidiyekoy and Uskudar (*see Figure 4.4*). The author suggests that all these areas stand out from the rest of the city, as they experience a high density of office settlements. They are also the hub-spots of the transportation network of the city. The major stations of public transportation, the main train stations, piers, major highways, boulevards, squares and interchange junctions of various transportation forms are all found in the vicinity of these business zones of Istanbul.

Many authors confirm the complex structure of the urban network in Istanbul, and list exactly the same localities as mentioned above, as *'the multiple centres'* of Istanbul (Tsuruta, 1997; Osmay 1998). Tsuruta argues that it is almost impossible to find the *'heart'* of the city. She suggests that the urban growth of Istanbul, as is the case in any other metropolitan area, is not a static process, but a dynamic one. Hence, in future, it would not be surprising to find that the business centres move within the city or even towards emerging districts in the outskirts.

Osmay (1998) emphasises the importance of the communication and transportation networks linking these zones. The author suggests that these business districts are not totally isolated from each other, but are like *'beads on a string'* along the Istanbul Strait. In other words, these business districts form the backbone of Istanbul, and are the areas, which mostly receive the highest attention from local authorities and the Municipality. Thus, the priority is usually given to these areas when infrastructure upgrading or improvement takes place in the city, as both human and commercial transactions are in high volumes in these zones.

Figure 4.4. Multiple Centres of Istanbul



1. Aksaray	4. Istiklal Caddesi-Taksim	7. Besiktas
2. Eminonu	5. Osmanbey	8. Uskudar
3. Karakoy	6. Mecidiyekoy	9. Kadikoy

Source: Based on Tumertekin (1997), p.186.

Today's urban Istanbul is not without its problems. In fact, as noted earlier, its chaotic atmosphere is so typical that one can argue that the hectic and mystic everyday life of Istanbul can be an attraction on its own for visitors. The city, with the population of over 10 million residents, is the biggest city in Turkey, and is also among the largest cities of the world. Its unplanned and rapid growth cannot solely be explained by the exclusive growth of squatter settlements. It is a result of an amalgamation of causes consisting of various external and internal factors. These factors range from a lack of consistent and effective urban planning to the economic crises experienced by the whole country, which forced people to migrate from rural areas to big cities where manufacturing industries secured long-term jobs.

Any analysis of this giant metropolitan area will be so detailed and complicated that there appears a high risk of losing the main focus of the research. Therefore, this research only focuses on the tourism-related problems, challenges and opportunities of Istanbul and seeks to develop suggestions to mitigate any obstacles to the effective functioning, managing and marketing of the tourism sector within an overall urban network.

4.6.2. Dilemmas and Challenges Faced by Istanbul 'The Megalopolis'

Major cities have universal problems, which mainly derive from the high density of people living within their somehow finite geographic borders. As Potter and Lloyd-Evans (1998) note, regional imbalance and inequality of income, social polarisation, urban concentration, unemployment, poor housing conditions, access to services and structural poverty occur in all urban societies. For instance, in urban areas, a larger number of people uses the infrastructure facilities ranging from transport to water supply than in smaller towns or rural areas. The propensity of misused, hence corrupted, infrastructure networks tends to be higher in urban areas. Another cliché about urban areas is that they are thought to have higher crime rates. This is again, arguably, because of the fact that urban areas consist of large populations from various education and social backgrounds.

As the biggest city of Turkey, Istanbul is not an exception to other urban areas, when it comes to such widespread *'urban problems'*. Some of these problems, which are related to the functioning of tourism in the city, are dealt in more detail in the following chapters where the strengths and weaknesses of Istanbul as a tourist destination are investigated. However, in this section, some major problems of the city are briefly discussed here to shed further light onto the understanding of Istanbul as a metropolitan area.

To start with, Istanbul is not considered as an urban or a metropolitan area by the geographers and politicians of the country. Due to the unceasing growth of its population, the city is now referred to as a *'megalopolis'* (Kirbay, 1998; Soysal, 1996; Erkip, 2000). The main reason behind the adaptation of this term is because new housing and office settlements emerging in the outskirts make any attempt to draw boundaries of the city impossible. In other words, Istanbul is a city with ever-expanding borders. Moreover, Istanbul is called a megalopolis because of the fact that nearly 15% of the whole population of Turkey lives in the city.

Hence, Istanbul can be considered as the city, which represents all Turkey and its people. The city, as a place where the changing characteristics of Turkey are reflected in its markets and streets, has actually become a small country on its own. The city stands out from many other major cities in Turkey not only with its exclusive importance as a trade, culture and historic centre, but with its influential power on the surrounding region and also on the rest of the country in fields ranging from culture to media and, from politics to trade.

However, the megapolis status does not solely rest on the fact that the city has an extremely large population and a distinctive influential power on the country. The term is also used negatively referring to the chaotic and congested structure of its urban network. In other words, Istanbul severely suffers from an ill-planned and uncontrollable growth of its population, which restricts local authorities from providing infrastructure facilities at a sufficient level.

The lack of effective infrastructure provision is not the only problem created by inward migration to the city. The widening gap between different social classes of population also causes cultural and social problems (ITO, 1997). One of the most obvious differences between the high and low-class residents of Istanbul is displayed by the housing settlements occupied by these different social classes. Before investigating how squatter settlements interfere with the effective functioning of the urban network in Istanbul today, it is important to note what caused such settlements to appear in the first place.

The growth of Istanbul was actually rather sudden. As mentioned earlier, the city remained a very restricted geographical location until the 1960s. The outburst of the city boundaries, on the other hand, happened so quickly that by the time the local authorities started to consider zoning plans for urban growth, the city had already spread in all possible directions. As Tapan (1998) notes, in spite of the important role played by Istanbul as a trade, culture and education centre throughout its history, the efforts of local authorities to prepare urban development plans and to foresee possible growth patterns were quite limited, if not non-existent. As the author further notes, so-called urban plans prepared during the Ottoman era at the end of the 19th century, were nothing other than urban maps and a breakdown of existing facilities and supplies. While such plans did not even fully cover the whole of the city within its boundaries of the time, they also failed to introduce systematic, rational and feasible urban development plans.

During the first thirty years of the Republican era, the only remarkable change with regard to the urban façade of Istanbul, was the replacement of the traditional Ottoman houses with more fashionable apartment blocks in prestigious areas like Beyoglu and Galata. They were yet to exploit the city and to result in surpass of the city borders at the time.

It was during the Republican era and after World War II that the Municipality invited European urban specialists to prepare advisory urban plans and projects. Following these consultations, and urban development projects, the local authorities took some action under Government initiatives (Kuban, 1996). Initial urban planning efforts mainly concentrated on improving inner-city transportation by broadening existing roads or building new boulevards, squares and junctions. While it was impossible to foresee the future explosion of Istanbul, these plans were unable to prepare the city to absorb the forthcoming increase in population with minimal negative effects on its overall urban mechanism.

The turning point for Istanbul as a megalopolis was the 1960s when the industrialisation era resulted in an unrelenting flood of inward migration to the city, which, even today, continues in considerable quantity. While the uneducated and unskilled labour stormed the city with the hope of finding jobs in manufacturing, the initial squatter settlements appeared in certain districts by the mid-1960s (TETOV, 1996). Since then, the landscape occupied by squatter settlements has not improved, but has continued to increase in Istanbul. Squatter settlements, which have changed the overall façade of the city, have also deterred the provision of municipality services in various areas.

People, who live in these settlements, are usually from low-income groups and find it difficult to integrate themselves within the social urban scene. As a result, in addition to economic aspects of the problem, the contrast between different social groups causes urban disintegration and social disorder in Istanbul. The tendency for people of similar backgrounds to cluster together in certain districts has resulted in the endurance of traditional rural values in an urban environment. In other words, one can argue that migrants have brought their way of life into Istanbul in a way that some small villages and rural communities within an urban format. Therefore, while the problem of *'squatter settlements'* accelerates the image of the city as an underdeveloped metropolitan with the lack of effective infrastructure facilities, it also greatly diminishes the quality of life in Istanbul for residents regardless of the socio-economic class they belong to (Ortayli, 1995).

The lack of urban zoning plans in the past and the overdue and ineffective actions taken by the more recent local planning bodies to mitigate this problem cannot be considered as the sole reason for squatter settlements to grow uncontrollably in Istanbul. There is a wider perspective of the migration problem in the country. Today, it is more than a local issue, but a national concern. In fact, although Istanbul may be considered as the city, which suffers most from the problems of squatter settlements, it is not the only city in Turkey. Other large urban areas like Ankara and Izmir have also experienced the occupation of vacant landscapes by shanty towns. As a developing country, Turkey has not fully managed to stabilise its national economy and to upgrade the living quality and working conditions of its citizens. Unstable economic growth stimulated by recurring economic crises, has resulted in an increase in unemployment and the movement of labour to larger cities where there are more job opportunities. However, even in such metropolitan areas, the increase in employment opportunities has fallen behind the increase in population, which means many people live just above the poverty line. Squatter settlements, as cheap housing options, have relieved some of the problems of urban residents who do not earn enough to pay their rent, water and electricity bills.

Besides, insecurity in Eastern Turkey, which was unfeasible for new investment developments due to terrorist attacks until the end of the 1990s, forced locals to move to other regions of the country. For the same reason, major public and private initiatives, funds and loans for both manufacturing and service organisations were mainly granted to establishments located in the Western Turkey. While not all of the labour force moving into urban areas is highly-educated and highly-skilled, they work in low-paid jobs and can only afford to stay in squatter settlements, which are mainly constructed with the help of friends and relatives over one night, but without legal rights and on free public land.

It can be argued that the solution to the problem of squatter settlements in Istanbul would only be achieved under two preconditions:

- Istanbul should go through a socio-economic reformation process, which should secure better employment opportunities in a better work environment with higher wages and upgraded insurance benefits for all kinds of labour, and;
- The present and future governments should make progress in transforming Turkey into a developed country. Economic growth should be stabilised and special effort must be made for the regeneration of Eastern Turkey, while the living and working conditions in rural areas must also be upgraded.

No matter whether it is built legally or not, the land occupied by housing and office settlements has increased in line with the increase in the population of Istanbul. While the old neighbourhoods have been torn down, seashores are being filled in and forest lands and water basins are becoming urbanised (Yucel, 1995). The Municipality opens up more public land for legalised private use every year. Within the city boundary, gardens, green areas and open spaces are rapidly disappearing as they are being engulfed by concrete buildings. Apartment blocks and skyscrapers raised in various districts along the Strait are not only anaesthetic in appearance, but also provide a contrast with the rich heritage sites and buildings of the city. In other words, the façade and landscape of Istanbul has been greatly impaired in certain areas by the unplanned and uncontrolled urban growth of the city.

Traffic congestion is another major problem for Istanbul. While traffic networks of almost all major urban areas do not flow during the peak hours, transportation in Istanbul is especially difficult as the city was built with narrow and irregular streets during the Ottoman era. One major reason for such urban growth is that streets were planned and constructed only for the use of pedestrians. Besides, the hilly topography of the city saw early establishments emerge along the banks of the Istanbul Strait, which were easily accessible by water transport such as rowing boats. Hence, narrow streets allowing small horse-carriages and pedestrians to pass through, set the scene for the many transport problems that remain unsolved to this day (Kuban, 1996).

To conclude, the major problems of Istanbul as a metropolitan area can be summarised as follows (Gulersoy, 1990; Kuban, 1996; Erkip, 2000):

- Effective and systematic urban planning in Istanbul started too late. Initial urban zoning plans prepared in the 1930s were only detailed city maps and failed not just to foresee the future problems of the city, but to provide solutions to the existing ones. By the time uncontrollable growth of the city was considered to be a major problem, it was already too late to recover from its severe effects such as traffic congestion, the undesired transformation of the architectural characteristics of the city, the emergence of squatter settlements and the dispersion of the city on a large geographical scale.
- Today, the solutions to urban problems are still *'left on the table'* by local authorities, until they reach their final chronic stages posing obstacles to the every-day life of the city residents. This can be explained by the complicated characteristic of public bureaucracy in Turkey, which results in numerous organisations being involved in the decision making process before any decision is taken on urban services and facilities, such as the improvement or upgrading of infrastructure facilities. Hence, local authorities take slow and ineffective action instead of immediate, effective and practical steps to mitigate the negative effects of urbanisation.
- Finally, all the urban dilemmas of Istanbul are linked to the nation-wide socio-economic and political problems of Turkey. Such national concerns, which have mainly originated from the consecutive economic crises, have sown the seeds of unstable structure of both the local and national economic systems with severe effects on demographic and socio-economic characteristics of the whole nation. Unless the country recovers from such crises and becomes a developed country, the problems will remain.

4.7. Conclusion: The Future of The City

Today, Istanbul suffers from many urban problems, which mainly derive from the unplanned and uncontrollable growth of its population, which started with the industrialisation movement in the 1950s. Some of these problems including traffic congestion, housing and lack of efficient infrastructure facilities are also experienced by other metropolitan areas in the world. What makes Istanbul different, however, is the disruption to the everyday functioning of its urban mechanism.

While the urban authorities of the city can be blamed for their overdue action, it is recognised that the nation-wide economic development of the country is the main cause of the problems. Hence, it can be argued that long-term and substantial solutions would only be achieved, if local, regional and national development plans are interdependently developed and aim to give an impetus to the regeneration of all-level economic, socio-cultural and physical structures.

However, in spite of the most pressing urban problems, the city is not without its advantages. As the biggest metropolitan of Turkey, it serves the nation as the main commercial, cultural, education, media and art centre. Its geography, which has allowed the control and direction of trade transactions throughout its history, continues to strengthen the connection of the city with the surrounding international regions. The city that connects Europe to Asia through the Balkans and the Middle East, captures the highest foreign trade transactions in Turkey. Following the collapse of the socialist block, the openness of Turkey to international trade and the entry of the country into the European customs union have all resulted in the growth of international businesses and organisations located in the city and increased its opportunity to emerge as *'a global metropolitan'* or *'a world city'*.

In the following chapters, the tourism industry of the city is investigated in further detail. As discussed in Chapter 2, the industry has been widely used as a catalyst tool in many urban destinations to alleviate their problems through the application of regeneration projects. Although the main emphasis is on the marketing of Istanbul as a city destination, some suggestions made in Chapter 8 can be considered from the perspective of: assuring the prosperity of the local economy of Istanbul, and; sustaining its status as an international hub destination through tourism-based revitalisation projects.

CHAPTER 5. METHODOLOGY

5.1. Introduction

In this chapter, the methodology, which may be regarded as a spine of the research, is described and evaluated. Indeed, the selection of appropriate research methods for a given investigation subject is of crucial importance to the validity, coherence and reliability of the research findings. Whatever the main purpose of a research project, whether it aims to provide analytical, explorative or descriptive results, the prerequisite for a systematic and logically flowing research process is the appropriateness of the research methods used.

For this study, the research methods are selected according to two main criteria:

(1) the qualitative research methods, which are used in social and human sciences and,

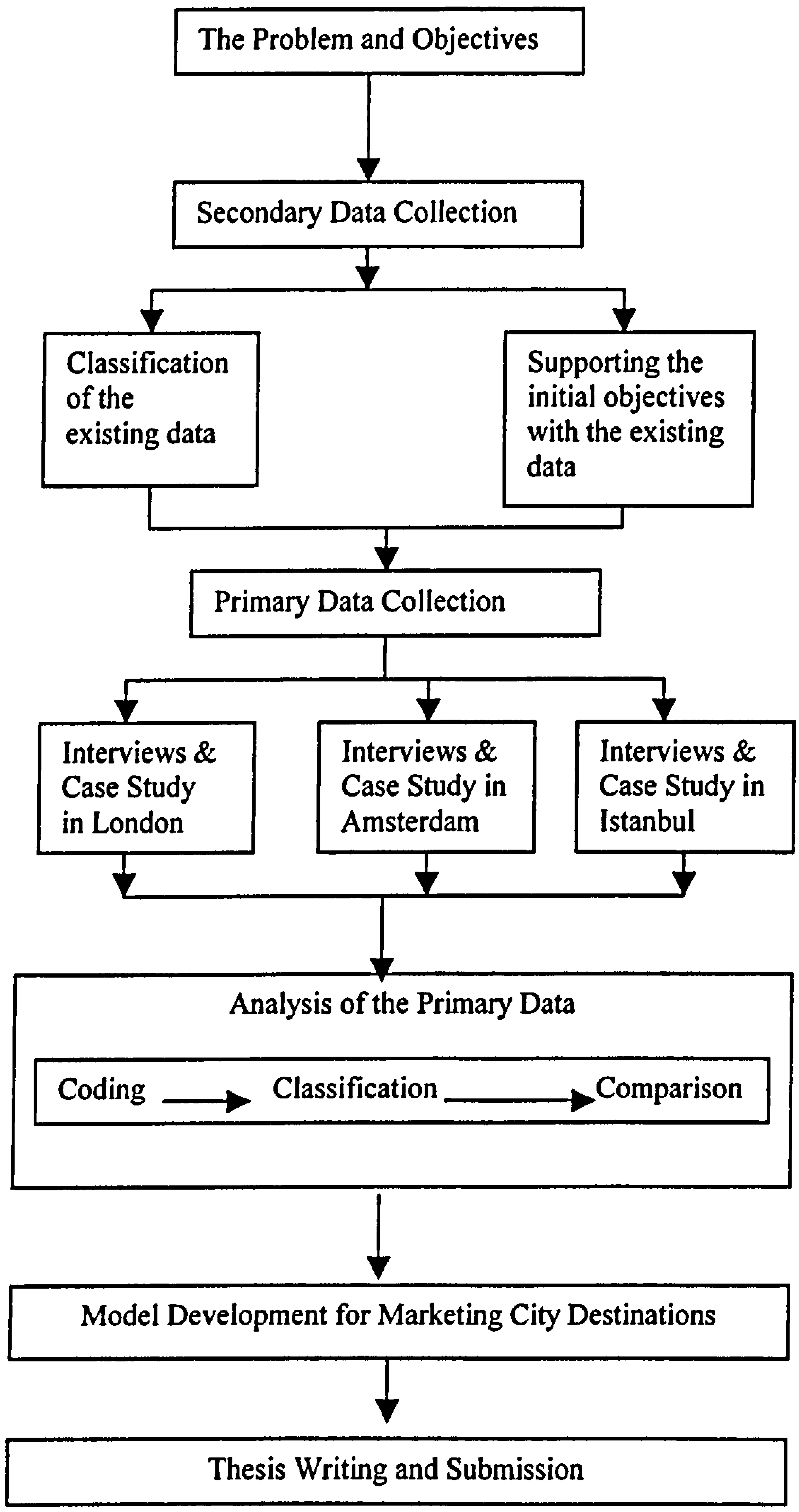
(2) the research methods, which are most suitable to explore the research subjects *-i.e. marketing city destinations and urban tourism-*.

Hence, attention is paid to research methods, which would facilitate the process of collecting and analysing qualitative data and, ones, which would provide research findings on which the research questions can be answered, and theories can be built. The initial investigation of various qualitative research methods and techniques has proved that the most important aspect of conducting qualitative research is to make sure that the validity and reliability of research findings are achieved by combining more than one method in an application of triangulation. Therefore, this chapter investigates the characteristics and validity of three particular research methods: extensive desk research; in-depth interviews and, multi-site case studies and, looks into their harmonisation in a triangulation process.

5.2. Research Process

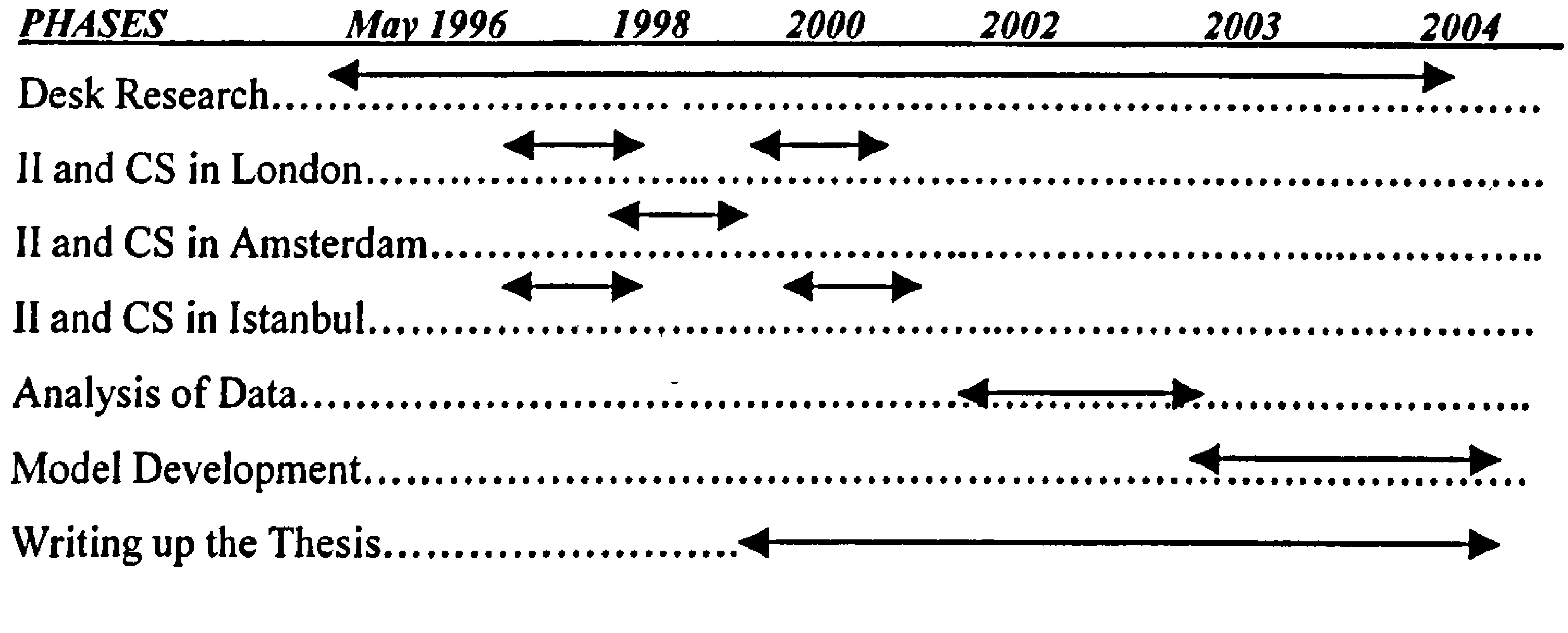
The process of the research is shown in Figure 5.1. As can be seen, the research started with the selection of the research subject and the identification of the objectives. While the collection of secondary data has been conducted throughout the investigation in order to establish exclusive knowledge on the studied topics and to keep the research up to date, the researcher initially spent 3-month periods in each case study city to collect primary data. Thus, field trips to London, Amsterdam and Istanbul were arranged for in-depth interviews, field studies and desk research on the tourism sector of the case study cities. Following the initial 2 year primary data collection, further in-depth interviews were arranged with more organisations in London and Istanbul. In the meantime, analysis of the primary data was carried out using a computer-based program (ATLAS.ti). The analysis of the research findings and the development of a marketing model for city destinations coincide with the final phase of the research, which lasted more than a year. The research timetable is shown in Figure 5.2.

Figure 5.1. The Research Process



Following the description of the research methods, this chapter concludes with some remarks on model development, as the main aim of this study is to develop a marketing model for city destinations and to support it with the research findings gathered from interviews, case studies and desk research. However, since life cycle analysis, carrying capacity analysis and SWOT analysis are also thought to influence the marketing decisions and plans of tourist destinations, these analyses are also applied to the case studies. The results of these varied analyses of the selected cities are expected to elucidate the differences in marketing activities, strategies and future objectives of the city destinations, which differ from each other in terms of the characteristics of their tourism sector. Finally, the limitations of conducting qualitative research and of the selected research methods are provided, with some recommendations for future research in the last section.

Figure 5.2. The Timetable of the Research



Abbreviations: II= In-depth Interviews, CS= Case Study.

5.3. Secondary Data: Evaluating The Relevant Literature

This research has been developed using a grounded theory approach, which places an exclusive desk research at the centre of a research project. Hence, evaluating the existing literature on the relevant subjects *-i.e. marketing city destinations, urban tourism and the tourism sector of London, Amsterdam and Istanbul-*, is considered to be an important research method to be used together with in-depth interviews and case studies in this investigation. The qualitative aspect of the research is enriched with detailed and complex information gathered from the secondary sources, which also provided quantitative data in the form of tourism statistics from the selected cities.

Despite the fact that urban tourism is a recent research subject in the field of leisure and tourism studies, the published literature on the various aspects of urban tourism and marketing city destinations is not as limited as it used to be in the 1980s. Numerous books, articles, research projects, documents, conference proceedings and newspaper articles can be found on: the management of city destinations; partnerships required for strategic marketing; tourist product packages of urban areas; competitiveness of city destinations; new tourism forms found in urban areas; tourism as a catalyst to rejuvenate deteriorated urban economies and; visitor profiles of city destinations. However, it is a fact that the supply side of city destinations has been studied more than the demand aspect of urban areas. This can be explained by the difficulty of analysing behaviour, perceptions and attitudes of urban tourists who fall into numerous categories such as shopping visitors, short-break visitors, day trippers, business visitors, heritage visitors and visitors on VFR (visits to friends and relatives) trips.

There is also a developed country dominance in the urban tourism literature. Many research projects on urban tourism tend to come from North America and the European countries. There are some articles and case studies on city destinations of developing and under-developed countries, but, in comparison, they are very few. In the light of this information, it can be argued that secondary data are used to stimulate the questions of this research. As grounded theory suggests, through analysing the existing literature, the research objectives were clarified and the formulation of the primary research methods was accelerated. Almost all of the questions prepared prior to the interviews were designed according to the information gathered from published material. Thus, the information was gathered on both the characteristics of the tourism sector of the case study cities and the objectives and marketing activities of the organisations, which were represented by the selected interviewees.

Therefore, the evaluation of the existing literature consisted of two phases: searching for secondary data on urban tourism and marketing city destinations in general and the characteristics of the tourism sector in London, Amsterdam and Istanbul in particular. Both to achieve general knowledge on the research subjects and to gain an insight into the tourism sector of the case study cities, the following topics were researched from secondary sources:

- Evolution of urban tourism and marketing city destinations as research subjects;
- The impacts of urban tourism on various city destinations previously studied by academics;
- The recent patterns and trends affecting tourism flows to city destinations;
- The evolution of urban networks as constantly changing nuclei, and the place and importance of tourism in urban networks;
- Tourism organisations and sector stakeholders in city destinations as the key decision-makers in the process of strategic city marketing;
- The costs and benefits of urban tourism;
- The characteristics of both the supply and demand sides of city destinations;
- The tourist product packages of city destinations as marketable products;
- Characteristics of existing or potential competing tourist destinations;
- Marketing methods and tools used by city destinations;
- Funding marketing activities in urban areas;
- The importance of partnerships in city marketing;
- Tourism and marketing plans, policies and strategies for urban areas, and their place in urban development plans;
- Tourism infrastructure in urban areas, and;
- Present tourism legislation and regulation.

It is important to note here that if a secondary source referred to one of the case study cities in any of the above areas, it was compared with the primary research findings or harmonised with the primary qualitative data in Chapters 6 and 7 as well as with the tourism statistics for London, Amsterdam and Istanbul. Besides, marketing brochures, leaflets, maps and other tourist promotional literature were collected in each city to examine the marketing activities carried out by the tourism organisations. The specific sources on urban tourism and marketing city destinations are noted in Chapters 2 and 3.

5.4. Primary Data Collection

Following the compilation of secondary sources on urban tourism and marketing destinations, various techniques and methods were compared in order to find the most suitable methods that would help achieve proposed research aims and goals, and gather further detailed information on the case study cities, which could not be otherwise obtained from the existing literature. Thus, primary data collection was inevitable to fulfil the data requirements of the research project. Primary and secondary data are used to supplement each other and to provide a focused view on to the general aspects of urban tourism, marketing destinations and the tourism sector of the case study cities.

As the concept of urban tourism is one of the most recent research phenomena in the field of tourism and travel studies, any research investigating the sector in city destinations cannot solely rely on the limited number of existing research projects, books and articles published over the last two decades. Although the number of research projects on the subject has been increasing, the need to gather primary information is especially imperative when a research aims to investigate individual city destinations and their tourism-based characteristics. Blank (1994) emphasises the need for primary data collection in the field of urban tourism, despite the fact that it is time-consuming and more costly than gathering existing information, and lists the following reasons for conducting primary research on the subject:

- Every city is unique. To know about a particular city's tourism, that city must be studied specifically.
- Primary data are gathered to fit specific research aims and objectives. Secondary data may not exactly fit such specific requirements, as it may tend to define, describe or investigate the tourism sector in urban destinations from a general point of view.
- Specific information about visitors to a city and their experiences can best be gathered while they are on-site, or by focusing directly upon their visit to that city. Few secondary data sources provide this kind of information.
- Primary data collection helps to compare various findings, explaining differences and developing new concepts, models and classifications based on reliable data.

In this research, in-depth interviews and multi-site case studies were used to collect primary data on all of the concerned subjects including both general aspects of the research topic *-i.e.*

'urban tourism' and 'marketing cities'- and the tourism sector in the cities in order both to acquire an extensive knowledge of the subjects and to meet the requirements of specific destination-based data. Before explaining the reasons why these techniques were chosen as research methods, the notion of the chosen methods is explained with three key themes: *'qualitative research'*, *'grounded theory'* and *'triangulation'* in the following sections.

5.4.1. Qualitative Research

In-depth interviews and case studies are the methods of *'qualitative research'*, which can be described as an inquiry process of distinct methodological traditions to investigate mainly social and human sciences (Creswell, 1998). As Creswell further notes, the reason why qualitative research is especially suitable for social and human science research is because that there are no firm guidelines, strict rules or specific procedures in these fields, and that they are under the constant influence of manifold factors, which result in continuous change and evolution of research topics.

In short, in contrast to quantitative research, qualitative research aims to obtain extensive information on a given topic in a natural setting and to present the detailed research findings in a comprehensive style, which is not mainly based on graphics and numeric explanations, but long passages of report writing. For example, while the satisfaction, perception and expectations of potential and existing visitors to a given destination can be investigated with qualitative research methods, the numbers of visitors to the destination can only be provided by conducting quantitative research.

Therefore, the characteristics of a qualitative research can be outlined as follows (Peterson, 1994; Creswell, 1998):

- small sample groups;
- detailed information from each respondent;
- long time periods spent in a natural setting;
- an analysis of large amounts of data;
- a search for meaning, ideas, and relevant issues to quantify in later steps of the research process, and;
- a presentation of research findings from different perspectives and in long passages.

Although qualitative research has been criticised for not being systematic, lacking subjectivity and focus, caused mainly by its requirements for analysing large amount of data, such disadvantages are mitigated, to a certain extent, by the use of computer-based programs when analysing research findings. These programs combine quantitative as well as qualitative approaches in the process of content analysis and make qualitative research methods more systematic by developing network systems for complex texts and paragraphs (*see Section 5.4.2.4 for the analysis of in-depth interview findings*) (Roller et al., 1995).

The reasons for pursuing qualitative research methods can be listed as follows:

1) While qualitative research tries to find answers to *'how/what'* questions, quantitative research tends to investigate *'why'* questions (Creswell, 1998). The questions in this research with regard to marketing city destinations, start with the question words *'how'* and *'what'*, such as *'how cities are/should be marketed'* and *'what are the main characteristics of the product packages of city destinations?'*, hence they are best studied by qualitative research methods.
2) The major research topics -i.e. *'urban tourism'* and *'marketing city destinations'*- fall into the categories of social and human sciences, which are ideally studied by the use of qualitative research techniques. As Shaw (1999) notes, issues related to the management of organisations, places and people such as policy formulation, marketing and effectiveness of organisations can best be investigated by qualitative research methods. Since this research concentrates on the supply side of city destinations and aims to shed light on the management and marketing of tourist product packages, the use of qualitative research methods seems to be more appropriate.
3) This research does not aim to create a new form of tourist product or tourist destination, but to explore the characteristics of city tourist destinations and the methods of marketing them. Thus, the research requires in-depth information on the management and marketing activities of city destinations and intends to gather such primary information from the key stakeholders of the tourism sector.
4) Although the key tourism stakeholders in city destinations can be numerous, they can also be represented in smaller sample groups in comparison to the large population of visitors or resident communities. Nevertheless, the information provided by a specific stakeholder representing a single sub-industry of the tourism sector may be totally different from the information provided by another. Their differing expertise, knowledge and concern for the tourism industry may result in incompatible views and perceptions on different aspects of the sector, while common ground on certain aspects can also be established. This is why qualitative research is needed to gain an extensive overview of matters concerning the management and marketing of city destinations.
5) Qualitative research is also chosen because the *'natural urban tourism setting'* of the case study cities is needed in order to compare research findings of the three cities and to develop a model for marketing city destinations. Understanding the strengths and weaknesses of the tourist product packages and how these strengths and weaknesses reflect on the marketing planning process in each city cannot be solely based on the

information provided by the stakeholders, who are the main actors of the process, but should be supported by field studies.

6) Finally, there were sufficient time and financial resources to spend on qualitative methods. Several months were spent in each case study cities to conduct both interviews and desk research at different times and, the assessment of secondary data lasted until the very last days of the completion of the research.

5.4.1.1. Grounded Theory

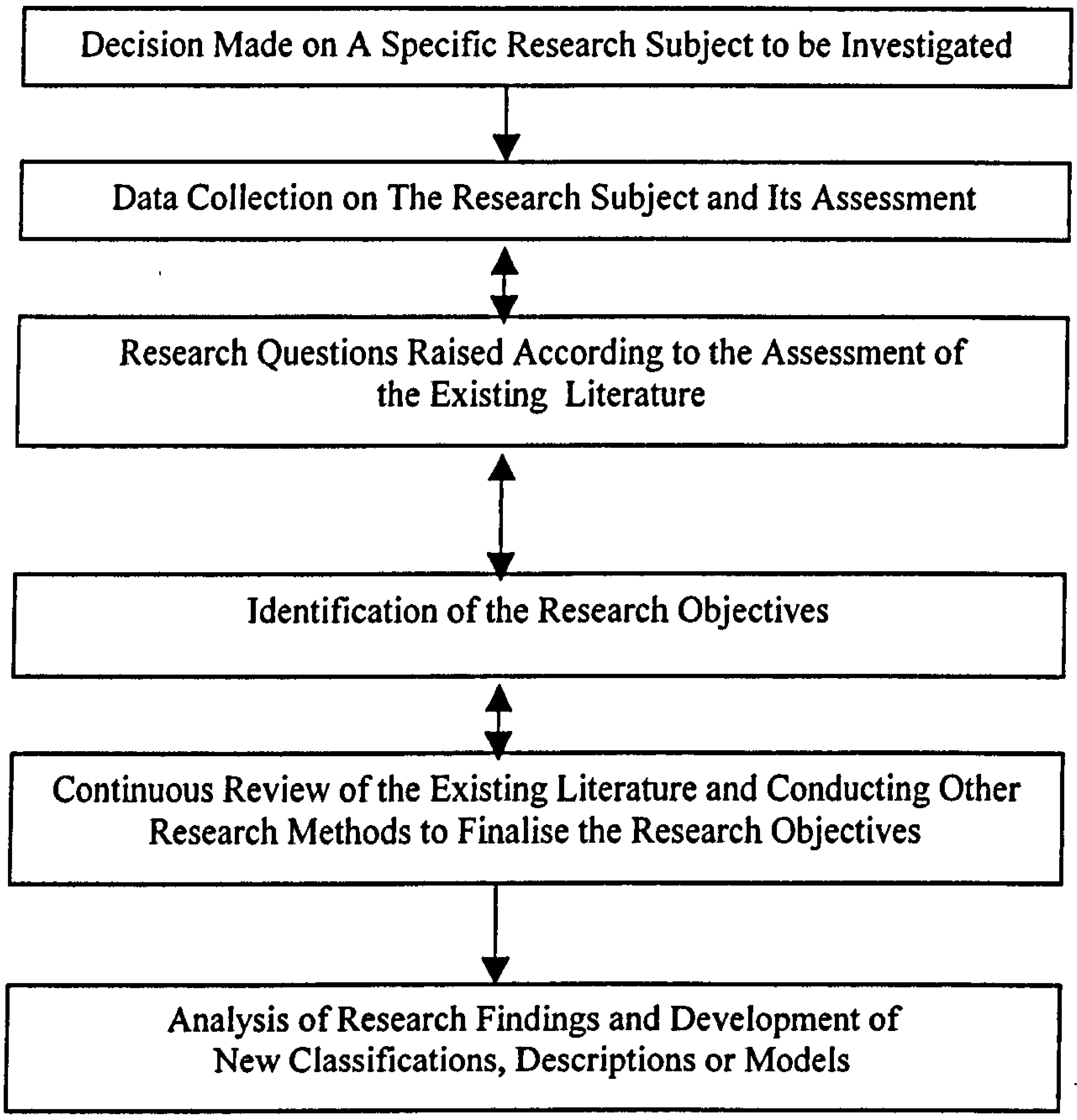
Grounded theory, which was first applied in sociology and health studies, is a qualitative research method, which attracts the attention of many researchers in the fields of social and human sciences today (Lonkila, 1995). The theory suggests that a researcher should start a study with an extensive literature review on a chosen subject and then should develop objectives, which are derived from the existing information and are tested by other research methods to validate the systematic approach of the research. In other words, research based on grounded theory is inductively generated by the research subject it is associated with (Creswell, 1998).

The process of grounded theory research is shown in Figure 5.3, which shows that data collection, analysis and theoretical constructions in grounded theory research, are harmonised with reciprocal relationships. In contrast to other research methods, the starting point of grounded theory research is not the identification of a theory, which is to be proved, but the research area to be studied (Strauss and Corbin, 1990). The method suggests that, through exclusive and systematic data collection, research objectives can be revised in time, which allow researchers to grasp a broad knowledge of the subject and to verify the credibility of the objectives through the employment of multiple research methods.

It is thought that grounded theory research facilitates the process of formulation of a research theory, as the findings are generated not only from secondary sources, but also from the data gathered in the natural setting of the research subject. However, in order to achieve reliable and effective results, which reflect reality, grounded theory research needs to be developed as a continuous and systematic approach into the process of both data collection and theory formulation. Hence, the approach requires sufficient and long time periods to be spent in planning research, data collection and the analysis of findings (Strauss and Corbin, 1990).

The present research started with a desk research on urban tourism and marketing destinations. The case study cities were selected prior to the data collection. Following the determination of the research questions, in-depth interviews were chosen as a research method and were conducted in the case study cities in order to gain an insight into the tourism sector of London, Amsterdam and Istanbul with the main focus on Istanbul.

Figure 5.3. Process of Grounded Theory Research



As grounded theory suggests, the collection of secondary data on all of the related areas *–i.e. urban tourism, marketing destinations and the tourism sector in the case study cities-*, was undertaken throughout the research until its completion. The first three chapters of the thesis, which are based on literature review, were updated with the data collected prior to and after interview meetings and finally, before the final phase of writing up the thesis. This was in order to make sure that the topics, on which the research objectives were developed, could be elaborated, tested and interpreted carefully and truly. In the same way, interviews and field trips were repeated in order to establish a control mechanism to update the research data gathered from both secondary and primary research.

Furthermore, the reasons for the use of a grounded theory approach can be listed as follows:

- The researcher was familiar with the subject of *'urban tourism'*, as he had previously conducted research on this subject and examined the tourism sector of a single Turkish city *-i.e. Izmir-* (Aktas, 1995). Although the coverage of this previous research was not as detailed as at present, it provided the researcher with some knowledge of urban tourism. However, in order to develop a new approach, to evaluate city destinations as marketable product packages and to propose substantive, analytical and appropriate research objectives, the researcher needed to study the subjects of *'marketing'* and *'tourism marketing'* as well. Grounded theory allowed the researcher to conduct a desk research on the concerned topics prior to the final determination of the research objectives, which emerged during the secondary data collection phase of the research.

- During the search for qualitative research methods, attention is paid on the nature of the research subject, which is mainly the tourism sector in city destinations. The multi-sided characteristics of the subject area and the complexity of the tourist product packages of city destinations require a long period of time to be spent on conducting detailed research. Grounded theory was thought to meet the prerequisites of the research, and to compliment its evolution and formulation as a process of scientific and reliable data collection, analysis and presentation.
- The grounded theory approach also allowed the research to harmonise the major qualitative research methods, which were selected according to the research objectives. An application of interviews and field trips within the process of grounded theory research does not cause any conflicts, but, in fact, they compliment each other when it comes to comparing the information gathered by various methods. The reciprocal relations of the selected methods enabled the research to evolve in a systematic and logical flow, and to be effectual in the formulation and accomplishment of the objectives. Hence, the continuous interaction of the the research methods within the process of grounded theory research, assured the reliability of the research findings and denoted the validation of the effective processing and analysis of the research data. After all, in-depth interviews and multi-site case studies are considered as the major grounded theory research methods to collect primary qualitative data (Creswell, 1998).

To summarise, it should be noted that grounded theory research is not a single qualitative research method, but a combination of various methods. Hence, it should be regarded as a systematic, analytical and inductive research process, which brings secondary and primary data collection methods together. What is significant about this type of research is that a research theory emerges during the data collection process and is tested in the natural setting of the research subject through the application of various methods.

The grounded theory approach is criticised for its overemphasis on discovering categories and indicators rather than actual experiences, and for concentrating more on theory search than interpreting existing theories (Lonkila, 1995). In order to mitigate such disadvantages, researchers who conduct grounded theory research, need, first, to investigate the research topic in detail and in its natural setting by interviewing appropriately sampled interviewees. Secondly, once particular ideas, notions and characteristics start to emerge as theories, a researcher should limit the concept of the investigation and should concentrate on certain aspects before the study loses its quintessence and becomes unfocused.

5.4.1.2. Validity of the Research

The validity of a research project is evaluated according to whether the proposed aims and objectives are achieved and whether the investigation is undertaken with the most appropriate research methods, which befit the nature of the research subject and produce coherent and reliable research outcomes (Arksey and Knight, 1999). As Veal (1997) notes, ensuring validity in tourism and leisure research studies is difficult, as research subjects tend to be either the perceptions, behaviour and attitudes of tourists who represent the demand side of the tourist sector, or the supply side aspects including tourist attractions and service providers at micro level and destinations and tourism decision-makers at macro level. In either case, the subject of tourism research is influenced by many factors and is prone to change overtime and even during the actual investigation of the research subject.

Besides, in many cases, researchers need to rely on the responses of people to straight-to-the point questionnaires in the form of interviews, or to purposefully arranged circumstances in other research techniques. Such circumstantial data gathering may be influenced by the biases created by researchers and respondents, which, as a result, may cause imperfect information in formulating research findings and diminish the validity of the research. The appearance and presentation of an interviewer, the interest of interviewees on the research subject, the sampling methods, the reasons for investigation, the personal characteristics of both interviewees and interviewers and the time and place of an interview, may all cause biases that are reflected in the given responses.

In order to enhance the validity of this research, a triangulation technique was used to combine more than one research method in the process of data gathering. While this aspect of the methodology is briefly explained in the following section, the precautions taken to strengthen the validity of individual research methods are as follows:

- Interviews were designed as in-depth, open-ended and semi-structured. This way, interviewers were encouraged to express their opinions, views and arguments in an open, relaxed and comfortable atmosphere. In fact, in many cases, the interviews took place in the work environment of interviewees, where they feel, arguably, more comfortable in expressing their views.
- There was no time limit to the interviews, so that respondents were given the chance to give complete answers in their own time.
- Interviewees were assured that the information they provided would be kept confidential, and would only be used for research purposes. This is why none of the interviewees or

organisations is denoted when quotations from interviews are offered. Instead, quotations are shown as anonymous. This was thought to build trust and openness between the interviewees and the researcher.

- Prior to each interview, potential interviewers were contacted by letter, which briefly covered the aims, objectives and purpose of the research and concluded with the hope to arrange an interview (*see Appendix 5*). Letters were printed on headed paper of Bournemouth University with a logo of the International Centre for Tourism and Hospitality Research, to assure interviewees of the solemnity of the research. Respondents were also informed about possible questions to be asked, if the request for interview was accepted.
- A thorough analysis of the secondary data both on the general aspects of urban tourism and the specific matters regarding the individual cities enabled the researcher to prepare both different and common questions for each individual interviewee, according to his/her anticipated expertise and knowledge. On-the-spot topics raised by interviewees were not ignored and were coded at the later phase of the research when the data were analysed. In short, the attention to sampling of interviewees and the structure of questions, served to enrich the validity of the research (*see Section 5.4.2 for interview sampling and questionnaire design*).
- In order to achieve consistency among all the research methods utilised in this research, a research process was proposed at the initial stage of the study. The researcher prepared a timetable that distributed the total time period of the research among several phases covering data collection, analysis and the presentation of findings. In order to complete any unfulfilled information or to mitigate conflicting information on certain matters, extra time was spent on data collection prior to the phase of writing up the thesis.
- In order to enhance the validity of the research findings, a computer-based program is used to code the interview results. While the need to use the program is explained in Section 5.5.2.5, it can be argued here that the analysis of the interviews examines all the related matters of the research subject in detail and provide insights into the concept of *'marketing city destinations'* in general and the possible marketing strategies for Istanbul in particular.
- Finally, despite all the efforts put into the establishment of consistent, transparent and objective research, the emergence of any inconsistent information is dealt cautiously and the readers are informed for the reasons of inconsistency between different data sources.

5.4.1.3. Triangulation of Research Methods

Triangulation is a social science technique, which mainly suggests the combination of more than one research method when collecting and processing research data (Arksey and Knight, 1999). Due to the lack of strict rules and firm guidelines in formulating the research procedure, the plausibility and reliability of qualitative research are more disputable than quantitative research methods (Shaw, 1999). Thus, triangulation has been developed as a technique to enhance the validity of qualitative research. Designing qualitative research, which relies on multiple methods, is considered to help a researcher to produce sound findings, equitable theory testing and reliable research outcomes.

The use of multiple research methods establishes a control mechanism, which eliminates the probability of collecting misleading, false or conflicting information. Triangulation can also enforce the objectivity of research by eradicating the biases arising from either the researcher or information providers. Furthermore, triangulation mitigates the weaknesses of different techniques and compensates their disadvantages through the application of alternative methods of data collection and processing (Chisnall, 1992).

While it is impossible to suggest that any one of the qualitative research methods used in this study provided more insight into the subject than any other, it can be clearly noted that they substituted each other and helped this thesis to evolve on sound ground. However, their particular influences on the different phases of the research can be distinguished. While the literature review, which was conducted on an on-going basis throughout the investigation, helped the research objectives to emerge gradually, in-depth interviews and multi-site case studies provided specific information about the characteristics of the tourism sectors of London, Amsterdam and Istanbul. One of the major aims of the research, which is to develop a general marketing model for city destinations and distinctive marketing strategies for Istanbul, could not be achieved without the testing of the research findings, which were based on the amalgamation of the information gathered by all three methods.

5.4.2. In-depth Interviews

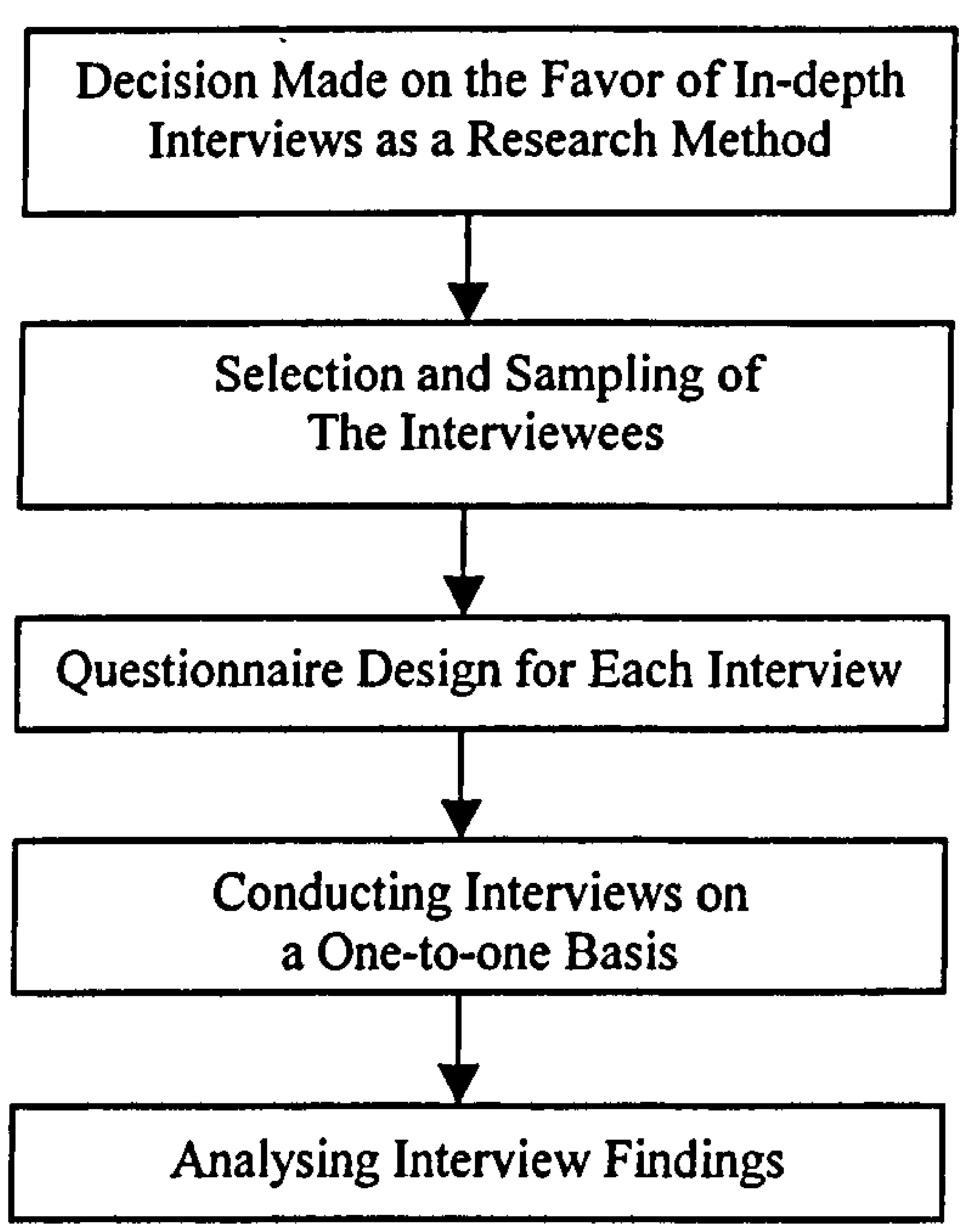
In order to gather specific and detailed information both about the case study cities and approach of sector stakeholders towards the general concepts of marketing city destinations, in-depth interviews were chosen as a primary research method in this study. In fact, the qualitative nature of the study encouraged the researcher to obtain personal views and opinions of sector decision-makers on several issues regarding the marketing and development of tourist product components in urban areas.

Interviews were conducted by the researcher in each city on a one-to-one basis. McIntosh et al. (1995) note that such personal interviews ensure a high response rate, as interviewers can alter questions to make them clear or probe in order to get satisfactory answers. Since personal interviews last longer than telephone or mail surveys, they tend to obtain much more information. They also help researchers to observe the interviewee and his/her expressions, which as a result, enables the researcher to establish a control mechanism to test the plausibility of answers.

Despite all these advantages, in-depth interviews are one of the most expensive research methods. Financing and taking the time to arrange, organise, conduct and analyse each interview can be costly. Besides, interview results can always be affected by the bias arising from either the interviewer or the interviewee. While the factors considered to mitigate such personal biases are explained in Section 5.4.1.2, the disadvantages of the long period of time and the large amount of financial source required for in-depth interviews, were overcome with the conduction of the research on a part-time basis in eight years.

The process of conducting in-depth interviews in this research is explained in the following sections (*see Figure 5.4*). While the sample group of interviewees consists of the industry decision makers represented by the high-level managers and directors of the tourism organisations in London, Amsterdam and Istanbul, the questions of each interview were designed to be semi-structured and open-ended in order to obtain information both on the general aspects of the tourist offer of the selected cities and on more specific matters regarding an individual organisation as a component of the overall tourist offer.

Figure 5.4. The Process of In-depth Interviews



5.4.2.1. Selection of the Interviewees

As the management and marketing of city destinations and their product packages are the main concern of this thesis, the managers and directors of the major tourism organisations representing both public and private sector organisations, and various sub-industries were determined as the main population of potential interviewees. Within this framework, potential interviewees included the managers, directors and marketing personnel of: the leading tourism authorities; tourism associations, partnerships, corporations and foundations; local offices of tourism and, travel and leisure departments of governments; major tourism attractions; shopping centres; tourism consultant firms; hotel operations; restaurants; convention and exhibition centres; transport companies; and sports complexes. Some academic personnel whose research interest is urban tourism and marketing city destinations, were also contacted in order to benefit both from their previous research experiences and also, from their knowledge on the characteristics of the tourism sector of the case study cities.

Potential interviewees, from a main population group, were selected according to the sampling method called *'purposive sampling'* which, gives the responsibility of finding the most suitable sample group to the researcher who is considered to be familiar with the main population and has a broad knowledge on the research subject under investigation (Fisek, 1998). With this method, the researcher can use a set of criteria to determine the number of interviewees based on his knowledge of the nature of the study. The sample size tends to be limited, as purposive sampling is mainly used when conducting in-depth interviews to gather qualitative data.

The initial phase of evaluating the existing research on urban tourism, marketing city destinations and the tourism sector of the case study cities, provided the researcher with information on the characteristics of London, Amsterdam and Istanbul as tourist product packages, and also on the trends of managerial and marketing theories developed by academics in the fields of tourism and travel studies. This process enabled the researcher to determine the sub-industries of the sector in an urban environment and to identify the key players of city destination marketing.

Since the main aim of this research is to gather as detailed information as possible from the stakeholders, the sample size is kept small. Around 25 organisations were contacted in each city, which gives a total of 75 potential interviewees. Attention was paid to make sure that potential interviewees would represent all of the sub-industries of the urban tourism sector. While some of the organisations contacted were commonly found in all of the case study cities such as the leading tourist authorities, some were unique to each city like the managers of tourist attractions. The total amount of interviews was: 18 in London, 16 in Amsterdam and 17 in Istanbul (*see Appendix 6 for the list of the interviewees and their organisations*).

Table 5.1 shows the classification of the organisations represented by the interviewees in each city. As the table suggests, there are three groups of interviewees. In the management group, the industry leaders and those organisations that are actively involved in city-wide collective tourism marketing and policy making, including the leading tourist authorities, tourism partnerships and sub-industry groupings such as the British Hospitality Association and the Association of Turkish Travel Agencies, are shown. In the second group, those interviewees representing individual tourism products and services embraced within the total tourist offer of the cities are listed.

These organisations are categorised according to their product characteristics fitting into different urban tourism forms including: culture and arts; heritage; sports; business and MICE and; shopping tourism. While tour guides are also covered in this group, the interviewees from the National Olympic Games Committee in Istanbul; Gay Games 1998 in Amsterdam; and the Thames Luxury Charters in London are exhibited as others. Finally, the academics and consultancy firm representatives contacted in the cities constitute the last group of experts. It is important to note that the total figures of the interviewees representing each of these groups add up to more than the total number of interviews held in each city. This is because some of the interviewees represent more than one group. The manager of the Oxford Street Association, for example, is shown as a representative of both a partnership and a shopping tourism organisation in the table.

Table 5.1. Distribution of the Interviewees According to Sub-Industries

	London		Amsterdam		Istanbul	
Decision-Makers	•••••	(5)	•••••	(5)	•••••	(5)
Partnerships	••••••	(6)	••	(2)	•••	(3)
Attraction Industry	•	(1)	•	(1)	•	(1)
Hospitality Industry	•	(1)	N/A		•	(1)
Distribution Channels	•	(1)	N/A		•	(1)
Culture and Arts	•	(1)	•	(1)	••	(2)
Heritage	••	(2)	•	(1)	••	(2)
Sports	•	(1)	••	(2)	•	(1)
MICE and Business	•	(1)	•••	(3)	•••	(3)
Shopping	•	(1)	•	(1)	•	(1)
Tour Guides	•	(1)	N/A		••	(2)
Others	•	(1)	•	(1)	•	(1)
Academics and Consultancy Firms	•	(1)	•••	(3)	•	(1)

Prior to the conduction of interviews, a letter, which outlined the research objectives and aims, was sent to the managers and directors of the major industry stakeholders in London, Amsterdam and Istanbul with a request for an appointment for interview. Some potential interviewees accepted the interview offer with a reply letter, and some made phone calls to set the interview date and time. However, some never replied and some refused to arrange an interview due to their busy schedules. In many cases, the organisations, which were contacted, replied with some written material including brief information mainly about the aims, objectives and activities of the organisation.

So-called *'snowballing effect'* also played an important role in the process of interviewee selection (Arksey and Knight, 1999). At least five of the interviews in each city were held with the tourism and marketing personnel recommended by other interviewees. Recommendations to meet other managers of major industry stakeholder organisations were considered carefully. Since the expertise and familiarity of each interviewee on the research subject is considered to be significant, it was assumed that their recommendations to meet other potential interviewees would be to benefit the research, rather than to influence research findings in the favour of their individual opinions.

When sampling potential interviewees, the main objective was to ensure that all points of view are gathered. Snowballing increased the response rate, as many potential interviewees were more likely to accept the interview offer if they are contacted with a reference from another well-respected organisation. In short, snowballing facilitated the process of sampling. This is why each interviewee was asked to recommend other potential interviewees who, they thought, were knowledgeable either on the matters of marketing city destinations in general or on the aspects of the tourism sector of the case study cities in particular. The conduction of interviews was ceased, when the primary data gathered started to become repetitive with each key personnel emphasising similar issues and when most of the sub-industries and key stakeholders are thought to be represented in the cities.

5.4.2.2. Questionnaire Design

Semi-structured interviews are neither fully structured in a sense that all questions are prepared by an interviewer and are presented to an interviewee for his/her answers, nor are totally designed as unstructured interviews which suggest that an interviewer and an interviewee build up the interview format spontaneously without any strict rules and questions imposed by the interviewer. Semi-structured interviews fall between these two interview formats (Arksey and Knight, 1999).

The very nature of this research required gathering as detailed information as possible from the various stakeholders of the tourism sector in the selected cities. While it was clear to direct the interview concept toward the particular characteristics of the sector and the marketing activities pursued by the tourism organisations in the concerned city, interviewees left free to express their opinions, beliefs and perceptions about the research topic with open-ended answers. Since the approach and knowledge of each interviewee on a given subject were presumed to be incompatible mainly because they represented a different sub-industry, there was a necessity to encourage the interviewees to provide information on the subjects with which they are more familiar. Hence, the responsibility of the researcher was to find the areas that each interviewee is willing to provide detailed information on the research subjects.

In fact, since the aim was to obtain qualitative information on numerous aspects of urban tourism, it would not have been practical to ask each interviewee to comment on similar components in detail. Instead, each interviewee was asked to answer a set of questions, which mainly relate to their interest area and profession. Hence, an overall picture of tourism in each city was to be drawn with an amalgamation of the findings of in-depth interviews, each of which shed light on different aspects of the sector.

The interviews followed a specific format, which consisted of three parts (*see Appendix 7 for an example of interview questions*):

1) Questions about the case study city and its tourism sector;
2) The aims, objectives and missions of the interviewed organisation, and;
3) The marketing activities pursued by the organisation and other tourism organisations.

While some key questions were prepared beforehand, some aspects raised by each interviewee resulted in on-the-spot questions. The key questions derived from the nature of the research subject, from the evaluation of the existing literature on the case study city, its tourism sector and the marketing activities pursued by the tourism organisations located in the city, and also from the analysis of the initial interview findings held in London. Other questions were prepared according to the information gathered from the secondary sources on the organisation, its marketing activities and its relationship with other tourism organisations.

Hence, there were both general questions regarding mainly the characteristics of tourism in the city and, more specific ones regarding the expertise of the interviewee. For instance, in each city, interviewees were asked about the strengths and weaknesses of their city, the marketing activities pursued by the leading tourism authorities, the international and national competitors of the destination, the perceived stage of the city in the tourism life cycle, and the major landmarks and constituents of image. However, the answers to these general questions varied, as the interviewees were not provided with a set of alternative answers. As noted above, all of the answers were given on an open-ended basis, which permitted an interviewee to express his/her opinions, perceptions and ideas freely.

To conclude, the questions were worded as clearly and simply as possible in order not to cause any misunderstanding. Attention was also paid to the structure of questions in a way that each interview flowed from topic to topic in a logical manner. While the initial questions were about the organisation itself, towards the end of each interview, the questions were more about the destination and its total package offer. Formulating interviews as open-ended, semi-structured and in-depth, helped the researcher to gather: spontaneous rather than forced; highly specific and concrete rather than diffuse and general, and; self-revealing rather than superficial information, which was required for systematic and qualitative evaluation (Judd, 1991).

5.4.2.3. Conducting the Interviews

Interviews were usually held in the work environment of the interviewees who found this convenient due to their heavy schedules. While each interviewee was asked beforehand about which place and date and what time would be more appropriate for interview, the majority accepted to arrange a meeting in their offices. However, a few interviewees suggested meeting outside their work environment mainly because they shared their office with other staff, which might interfere with the interview flow. The researcher met with these interviewees in a public place like a restaurant or a cafe or even at the interviewee's residence. Interviews with 1 interviewee in London, 3 interviewees in Amsterdam and 1 interviewee in Istanbul were outside of work.

The duration of interviews relied on many factors including the interest of the interviewees in the subject, differing personal characteristics and the schedules of the interviewees. Despite the fact that all interviewees were managers or directors with a busy schedule, they all answered questions in their own time and did not force the researcher to finish the interview before all questions were completed. However, there were variations between the duration of each interview depending on the knowledge and experience of an interviewee on the research topics. Interview times varied between 45 minutes and 2 hours.

In order to secure a faithful analysis, interviews were tape-recorded with permission from the interviewee. The majority did not refuse the use of tape-recorders, but some did mainly because of the organisation policies, which, restricts employees from providing formal information to outsiders without the confirmation of higher boards and communities. One interviewee in London refused to use a tape-recorder, as she did not feel comfortable talking to it. She thought that recording her responses would influence the way she answered the questions, as she would pay more attention to how she structured her sentences rather than the content. All together 1 interviewee in London, 2 interviewees in Amsterdam and 1 interviewee in Istanbul refused to use tape-recorders. In these cases, the researcher took notes during the interview and expanded these notes for analysis coding straight after the interview in order not to miss any information. For those interviews that were recorded, answers were transcribed verbatim and saved as computer files to be used for the analysis phase of the research, which is explained in the following section.

5.4.2.4. Analysing Results with A Computer-Based Program: ATLAS/ti

The analysis of the interview findings was the final stage of this research. Clearly, analysis should provide reliable outcomes so that previously developed aims and goals can either be accomplished or be discarded according to the opposing and supporting research results with the objectives.

Qualitative research, as mentioned earlier, has always been criticised for its unreliable, unsystematic and subjective research findings. The coding of qualitative research findings which used to be held manually by researchers, is, in the same way, criticised for not being trustworthy, definite and systematic, while hypothesis-testing in quantitative research is considered to follow a more invariant process with strict rules and procedures in a controlled environment which minimises errors caused by analysts. However, recently developed computer programs with scientific software can now be used to analyse qualitative research results, which, as a result, make the analysis process more transparent, systematic and reliable (Kelle and Laurie, 1995).

Computer-aided analysis of qualitative research findings eases the process of evaluating large and complex textual data, and, to a certain extent, combines qualitative and quantitative research analyses by segmenting textual data within categories in a network system. Some of the benefits of computer programs in analysing qualitative research findings can be listed as follows (Creswell, 1998; Kelle and Laurie, 1995; Weitzman and Miles, 1995):

- Computer programs provide an organised storage file system so that the researcher can quickly and easily locate material and store it. The researcher is able to make notes, compare, edit, correct, extend or revise different files and their contents. This way, large quantities of textual data can be analysed fully.
- Computer programs help a researcher locate material in a network, whether this material is an idea, a statement, a phrase, or a word. The search for text in the network can be easily accomplished with a computer program.
- A computer program encourages the researcher to look at the database line for line and think about the meaning of each sentence and idea. Coding by attaching keywords to segments of text permits comparison, retrieval and building network systems. By linking relevant data segments, forming categories, clusters or networks, the researcher can complement a qualitative research with quantitative research techniques. In fact, content analysis with computer programs enables qualitative researchers to count frequencies and sequences of words and phrases, which result in a numeric segmentation of textual data.
- The researcher can write commentaries and can link memos to text segments for deeper analysis. Computer programs can provide organised graphic mapping in which the links between codes, memos and various networks can easily be inspected.

- Since computer programs eases the process of content analysis, the researcher can produce reliable and objective findings based on systematic and transparent conclusion-drawing and the verification of research hypotheses. Moreover, developing conceptually coherent explanations of findings and systematic theory-building are accelerated by computer programs. Analysis with these programs is based on some rules and procedures, which make a qualitative research explicit, coherent and interpretative. They also ensure that theory building is grounded in the data and its common elements and is not based on single and untypical incidents.

In the light of such benefits, a computer program called ATLAS.ti was used to analyse the interview findings. The selection of this particular program was not because it differed distinctively from the other existing qualitative research software programs *-i.e. QSR NVivo, QSR NUD*IST, WinMAX, HyperRESEARCH, C-I-SAID, Etnograph, Code-A-Text etc.-*, but because of its clear referral to grounded theory applications. The use of ATLAS.ti was also considered to alleviate the process of analysing and interpreting the gathered primary data and also, to ease the phase of theory building on the roots of grounded theory research. In fact, as Lonkila (1995) stresses, the influence of grounded theory is particularly obvious in ATLAS.ti, as the terminology used in the program is the equivalent of the terminology used by any grounded theory research.

The functioning of the program can be observed in Chapters 6 and 7, where the primary data findings are presented with the code networks created using the programme. In this section, a brief introduction is provided into the overall design of ATLAS.ti and the procedure followed when the analysis and interpretation are undertaken with regard to the interviews of each case study city. The obvious start was to transform tape-recorded interview findings into computer files for on-screen analysis. While each interview was typed and saved individually as *'primary documents'*, they were gathered under three hermeneutic units, one of which is dedicated to each case study city. Hence, there are the London hermeneutic unit (HU) covering 18 primary documents *-i.e. the London interviews-*, the Amsterdam HU combining 16 primary documents and Istanbul HU combining 17 primary documents.

Next, primary documents were coded individually within their concerned hermeneutic units. *'Coding'* is one of the most important functions of ATLAS.ti and is also of crucial importance to the analysis of qualitative data. The reliability and coherence of codes that can be considered as keywords attached to particular text segments, are imperative if the validity of a research is to be assured. Attention must be paid to the selection of codes and their attachment to the appropriate text segments. If codes are applied with a different meaning at different parts of a textual data, the conflict would produce spurious conclusions. On the other hand, a consistent attachment of codes to text segments would provide a systematic analysis and valid research results. This way, neglect of important information and its analysis would be diminished (Kelle and Laurie, 1995).

Coding interview findings, which are gathered as responses to open-ended questions, is especially difficult, as the researcher has to be careful in interpreting the meaning of responses and in selecting codes suitable for various text passages which do not necessarily flow a unified format in each interview. The researcher must be familiar with the research subject, the knowledge and involvement of an interviewee on the subject and should decipher carefully the way the interviewee expresses his/her opinions, ideas and beliefs (Judd et al., 1991). Unless a meaningful categorisation of codes and coded interview findings is established, the coherence and validity of the research results would be put at risk.

In this research, prior to conducting interviews in each city, some information was gathered on the aims and objectives of the organisation, which was assumed to provide some understanding of the role played by the organisation in the tourism sector of the city concerned. Besides, selecting interviewees from the high-level managers and directors of tourism organisations who are supposedly the key decision-makers when marketing the concerned destinations, ensured that the interviewees had relevant and considerable knowledge on the research.

The selection of codes was based on the research notes, which, emerged from the literature review on the research subjects and the characteristics of the sector in each city. When analysing the initial interviewees for the cities, the remarks made by the interviewees assisted the coding scheme and helped the researcher to add some more codes for thorough and complete analysis of the responses (*see Appendix 8 for the list of codes*). However, it should be noted here that the inclusive structure of codes emerged gradually in the ongoing process of the analysis. While some of the initially selected codes were dropped due to their inapplicable and irrelevant concept in theory building, some new ones were added.

In ATLAS.ti, there are four coding techniques: open coding, in-vivo coding, code-by-list and quick coding. *'Open coding'* is used when there is a need to create a new code for text segments in a primary document. *'In-vivo coding'* creates a code for a text segment which itself can be used as a code name. For instance, Paris is chosen as a code in this research, as the city is considered to be an international competitor for Amsterdam and London. Therefore, each time the city is mentioned by the interviewees, Paris was coded with in-vivo coding technique under the code name of *'Paris'*. *'Code-by-list'*, is used to assign existing codes to primary document sections accordingly. By selecting any number of codes from a code list, text segments are coded in order to measure frequencies and sequences of each code within multiple primary documents. Finally, the *'quick coding'* technique is for the consecutive coding of text segments using a single code: an analyst selects a single code from a code list, and can attach the code to the appropriate segments of multiple primary documents. This method is especially efficient when new codes emerge toward the end of the analysis process. Such new codes can be attached to the primary documents, which have been coded already (Muhr, 1999).

In this research, *'referential coding'* which, suggests that codes serve as signposts rather than models for the data contained in primary documents, was considered when coding the interview results (Kelle and Laurie, 1995). While topic-related codes provide hindsight to the information provided by the interviewees, networks that bring several codes together, are used in model building. Hence the next step following coding the primary documents was to develop networks for each hermeneutic unit. After a network category is selected, the researcher chose the respective codes by specifying and validating the relationships between them in a network diagram

For instance, from the analysis of the London interviewees, the following networks of codes and memos originated: visitor generators, tourism management, the need for partnerships, the strengths and weaknesses of the London tourist product, competitors for London, image, marketing segments and the marketing tools used to promote London. The codes, which relate to any of these networks, are displayed in a network diagram in which the relationships between various codes can be seen. In this respect, ATLAS.ti enabled the researcher to link multiple codes in six different relation forms (the symbols used for each relation is shown in parentheses) (Muhr, 1999):

- Code 1 is associated with Code 2 (=),
- Code 1 is part of Code 2 ([], P),
- Code 1 is cause of Code 2 (=>, C),
- Code 1 contradicts Code 2 (<>),
- Code 1 is a Code 2 (isa),
- Code 1 is a property of Code 2 (*}).

In addition to these relationship links, the researcher was able to identify other forms of relationship between different codes and to name them accordingly. Each of these has formal logical attributes, such as transitive, symmetric and asymmetric. These are displayed in networks. While symmetric relations have no arrowheads because they run equally in both directions, asymmetric relations have an arrowhead pointing toward the target.

In addition to codes, '*memos*' which store notes and information gathered from the interview findings can also be displayed in networks. In contrast to codes, which are named with few words, memos can be explanations, notes and descriptions, which are attached to codes.

As mentioned earlier, Chapters 6 and 7 may provide further insight into the network and codes development in ATLAS.ti with the case study examples. However, it is important to note here that the meaningful interpretation of the research data can only be represented in a network of various codes in which the relationships between codes are displayed. While codes help to name text segments correspondingly, displaying them in diagrams to discover conditions, consequences, associated interactions and strategies are done by networks. As Lonkila (1995) notes, in this sense, networks serve as the prerequisites for developing a grounded theory investigation, while codes guide theory development. In other words, codes are transformed into network systems for theory testing, hypothesis analysis and model development.

5.4.3. Multi-Site Case Study

In this research, the multi-site case study approach is executed in order to enhance the validity and to mitigate any potential limitations of the research methods used. When decisions were made with regard to the third research method to be used, particular attention was paid to the compatible methods, which would provide further detailed information on the research subjects, but which would not interfere with the progress of in-depth interviews and literature review. The chosen method had to be compatible with the other two methods in a way that the prerequisites of conducting qualitative research were not abandoned.

Within this framework, as Peck (2000) states, the case study approach serves as a valuable research tool within the social sciences and offers a unique opportunity to enhance the understanding of the nature of social problems by grounding the learning experience in the reality of in-depth, multidimensional investigation and analysis. The selection of this approach is specifically applicable to this research, as case studies are often used to respond to "*how*" and "*why*" questions of qualitative research and deal with complex operational links that cannot be adequately examined using other research paradigms such as experiments and surveys (Beeton, 2005). Considering that the tourism sector of urban areas functions in a complex system, where the interdependency of manifold sub- and supplementary industries is further complicated by the sheer number of key actors responsible for policy-making and marketing, the use of case studies is considered to be valuable for the development of a uniform marketing model for city destinations.

As Gray (2002) notes, one of the main advantages of a case study is its concern to examine different elements within social and cultural processes and its suitability to interdisciplinary nature of the processes studied. Moreover, as Beeton (2005) stresses, the case study approach puts the emphasis on the process rather than outcomes. As both authors agree, the identification of a specific and unique case helps to reveal the multi-layered complexity of the process researched and can produce intense and relevant insight into the research questions.

The problem, however, arises regarding the justification of case studies as research methodology. While some authors argue that case study is a research method or tool on its own (Peck, 2000; Beeton, 2005), others disagree by emphasising the fact that case study is not a single research method, but is an approach, which uses multiple methods and data sources to reach an in-depth analysis (Stark and Torrance, 2004; O'Leary, 2004). In any case, researchers using case studies are advised to employ various data collection methods, to do preliminary work before entering the case environment and to support their findings with relevant literature review (Stark and Torrance, 2004). The consensus reached by both views is that case study is a detailed examination of subtleties and intricacies and investigates the context and setting of a subject. It is this consensus, which proves the aptness of the approach for the analysis of the management and marketing of city destinations, where product managed and marketed is the case study *–i.e. place–* itself.

According to O'Leary (2004), case studies can be used for manifold reasons including the flowing:

- to have an intrinsic value – case might be unique, interesting or even misunderstood;
- to debunk a theory – one case can show that what is commonly accepted might be wrong;
- to bring new variables to light – exploratory case studies can often bring new understanding to the fore;
- to provide supportive evidence for a theory – case studies can be used to provide anecdotal evidence for a theory or to triangulate other data collection methods;
- to form the basis of a theory – a number of cases may be used to inductively generate new theory.

Such reasons of use also form the benefits of the case study approach. While a case study enables a more in-depth examination of a particular research subject, the information it yields can be rich and enlightening and may provide new leads or raise questions that otherwise might never have been asked (Brewerton, 2001). Throughout the data collection process, the approach demonstrates flexibility for the researcher, which is not evident in many alternative research modes. Having utilised information from a wide variety of sources, case studies can also show the influence of the passage of time through longitudinal studies. Although the hindsight and findings gained are evident in the present, their future effects can also be illustrated to a certain extent depending on the nature of the research subject (Beeton, 2005).

Most importantly, case studies are not one-off and specific to a single topic, but are applicable to other situations, as they have the capability to take into consideration the effect of numerous factors by encompassing more research questions within the boundaries of the case. Moreover, researchers can create sub-cases embedded in the original research context, providing a further richness and complexity of data and analysis. As Beeton (2005) argues, the application of rigorous interpretation combined with reason and logic, enables the researcher to obtain place-specific conceptual insights that may then be tested for a wider applicability through further case studies or the use of additional methodologies, creating a multi-method case study.

On a more strategic level, a case study attempts to build holistic understandings through the development of rapport and trust between the researcher and the case, where the goal is '*authenticity*' and in-depth exploration that goes beyond what is generally possible in large-scale survey research (O'Leary, 2004). The problem, however, lies in the selection of an authentic case, especially when information sources hesitate to contribute to the research process and prefer to suppress data considered '*confidential*' or '*proprietary*'. Case studies are also potentially vulnerable to the bias of the researcher, who is the primary instrument of data collection and analysis. The value system of the researcher may influence the presentation of the facts as well as analysis, while the readers can also be influenced by their own value systems in remembering results that support their values and rejecting the contradictory ones (Beeton, 2005). In order to enhance the validity and credibility of the research results, it is, therefore, important to triangulate the research process by looking at the same issue in different ways and collecting data of different kinds from different people (Laws, 2003).

Overall, problems with case studies arise largely from the generalisation of research findings. The approach has been criticised as speculative, unreliable and too specific to be replicated or applied generally (Beeton, 2005). As Stark and Torrance (2004) argue, the major issue to be addressed by case study is where to draw boundaries *–i.e. what to include and what to exclude–*. In addition to the physical boundaries of the case, as in cities and work places, the social and historical context of a research problem needs to be considered within the analysis. Clearly, one needs to rely on his/her knowledge and judgement during the identification of a case study and should provide reliable evidence on the reasons why certain aspects are covered and why other related parts are eliminated. No matter how clearly and intently the boundaries are defined, case study reports can be long due to the richness of data and complexity of analysis (Beeton, 2005). In order to reduce the length of this thesis, the analysis regarding the management and marketing of the selected cities' tourist products are presented in the main chapters, while supplementary and supporting information is revealed in the appendices.

In this research, the limitations of the case study approach are attempted to be overcome by using the approach with other data collection methods as well as to broaden the research concept through selecting different case studies each providing different perspectives to the research questions. Since it would be impossible to draw a uniform marketing model for city destinations from an analysis of a single case, the attention is paid into whether evidences collected from one city is applicable to other cases. As Brewerton (2001) notes, it is only when a number of studies yield similar results that it can be argued that robust findings prevail. While the logic of replication is central to systematic case study research, the components and process of the model developed at a later stage can only emerge with common features and theories confirmed by each case. So-called multi-site case study helps assure the completeness of the information gathered and enable a researcher to compare and contrast the findings of each case study where applicable. Having organised field trips to three cities and conducted in-depth interviews with key authorities, the selected cases are analysed in the process of progressive focusing with particular attention paid onto their tourism management and marketing practices in this thesis.

In addition to Istanbul as the main case study, London and Amsterdam are selected as '*exemplars*' of what is practised elsewhere. For the completion of the multi-site case study, the researcher arranged 3-month field trips to each city during which literature review and in-depth interviews are undertaken collaboratively. The selection of these particular destinations is justified as follows:

- One of the most obvious ways to classify different cases is to look into their physical attributes, such as size and geography. From this standpoint, London, Amsterdam and Istanbul are the biggest and most well-known cities of the countries concerned. While London and Amsterdam are the national capitals of the UK and the Netherlands respectively, Istanbul, with a sixth of the overall population of Turkey living in the city, stands out as the biggest metropolis of the country. All of the case study cities play an important role as trade, business, finance and culture centres.
- Due to their importance as the most well known metropolitan areas, they are the gateways to their countries. Their hub destination characteristics stem from both national and international communication networks enriched by the amalgamation of stations and ports of all types of transportation modes in these cities.
- While all of the case study cities benefit from an extensive variety of tourist attractions, facilities and services existing within their urban boundaries, their tourist product packages combine historical sites and buildings, cultural and traditional activities,

entertainment, sports activities, conference and exhibition centres and other sorts of leisure and recreation activities. The initial literature review has supported the fact that the key authorities of all three cases attempt to develop and market their cities as heritage, shopping, business and cultural destinations.

- They are all based by waterfronts, and have gained an advantageous historical importance due to their strategic geographic locations.
- Despite these similarities, the differences especially with regard to the tourism sector, elucidate why each has followed a different tourism growth path. In fact, while each city is different in terms of demographic characteristics, sectoral structures of economy, and cultural and social life, they also differ in the targeted market segments. Due to the unique aspects of their tourist product package, differences in the visitor profiles of Istanbul, London and Amsterdam are apparent.
- The organisational structure of the leading tourist authorities of the cities differs as well. While the leading tourism authority in Istanbul is a public organisation, London and Amsterdam are represented by semi-public and private leading authorities respectively.
- Prior to the primary data collection, it was assumed that London, as *'the leading urban destination'* in the world, would stand out as a success story with a consistent increase in visitor arrivals. Amsterdam, on the other hand, was presumed to be experiencing a decline in its visitor numbers, as the city was thought to suffer from the negative image of *'a city of sex and drugs'*. Istanbul, for which a long-term strategic marketing plan has never been prepared, was taken as the main case study in order to make suggestions on optimal marketing strategies for the city with the lessons learned from the first two.
- This research aims to define the concept and development process of city tourist destinations as marketable product packages, with a thorough analysis of both the supply and demand sides of the tourism sector in urban areas. Therefore, it was crucial to select major tourist cities, where various development plans and marketing strategies have been in practice for a long time, so that their evolution could be examined effectively without the effects of short-term fluctuations in visitor numbers and inconsistent efforts of consecutive authorities. The fact that both London and Amsterdam have started to evolve as tourist destinations as early as the 1960s, is considered to provide important insight into the primary prerequisites of developing an urban area for tourism and their applicability to newcomer destinations such as Istanbul.
- At the early stages of the desk research and also throughout the interview conduction, it has become evident that Istanbul suffers from a negative image, but comprises a rich heritage offer, the effective management and marketing of which presents a remarkable opportunity for tourism growth. Although on a different conceptual level, Amsterdam dealing with negative image problems for years and London retaining its leading position

mainly due to the efficient composition of heritage offers with other alternative tourist products are considered to be good exemplars.

- Finally, Istanbul was chosen as it represents a city in a developing country. As stated earlier, the existing literature on urban tourism mainly originates from the Western world with the examples of American and European city destinations. This research, by analysing Istanbul together with two of the most important destinations of Europe, aims to discover commonalties and differences between the selected cities in order to develop optimal marketing strategies for Istanbul.

As mentioned above, multi-site case study involves in-depth and contextual analyses of similar situation in different environments, which suits the main aim of this research. After the selection of the main and exemplar cases, the attention was paid to collecting primary data, which would be compatible and comparable in each city. In order to present alternative views in each subject related to the research topic, the findings are presented with theoretical grounding as well as with the support of previous research on the cities if/where available. The differences and similarities between the cases are highlighted through the investigation of the cities under chapter headings, which, as a result, help elucidate the prerequisites of successful marketing and development of city destinations. Although it is not the aim of this research to argue that case study is a research methodology on its own, the repetition of data collection in three cities and the comparison of the findings are considered to verify the reliability of the uniform model developed according to the common tourism management and marketing practices executed by these cities. This is why multi-site case study approach was selected to complete the triangulation process.

5.5. Developing a Marketing Strategy Model for City Destinations

The tourist offer of cities can be regarded as commodities embracing many different tourist products in their packages. It is certain that an analysis of any city tourist destination requires an analysis of the entire range of tourist products offered by the city. Offering product clusters to target markets is something unique to city destinations that make it more complicated to develop a general model, which can then be applied to all city destinations, regardless of the variety of tourist attractions each may have. Clearly, London offers something different from Istanbul and Amsterdam. Each has a historical background and unique attractions, which have been associated only with these cities, such as the mosques in Istanbul, the canal tours in Amsterdam and the Tower Hamlets in London. In addition to these major differences, their image built up over the years means that each tourist product cluster bringing together different products within the same city package may not be comparable item by item with the packages of other city destinations.

Therefore, it is important to explore the term *'model'* referred to in this research. In fact, the aim to develop a general marketing process model for city destinations is to simplify what seems to be an amalgamation of complex marketing activities, analyses and procedures. Relying on the qualitative data gathered, it is assumed that a model can be developed using a systematic approach. The model cannot clearly fit into the specific and distinguishing characteristics of individual cities. However, the identification of various logical and sequential steps in the process of strategic marketing planning should be applicable to city destinations in general. Such a model is not static, but dynamic. It would serve mainly in the understanding of the product packages of urban areas as marketable commodities and should detail the components of city destination marketing in the context of marketing relationships between a given city and its visitors, and also among the key decision makers of the urban network.

For the above stated reasons, the model developed in this research is a *"knowledge-based"* and *"cased-based"* marketing model. As Van Bruggen and Wieranga (2001) state, marketing models have been of great value for the accumulation of generalisable marketing knowledge and can be classified according to the purpose of use. Knowledge-based marketing models and systems do not focus on finding the best solution for the identified problem, but emphasise the reasoning process of decision-makers and marketers. Such models use manifold data sources for analysis including mainly the knowledge of experts as well as research and case studies related to the marketing problem. Case-based models also focus on the reasoning phase of the decision-making process by analogical thinking, which is a way of solving problems in which solutions to similar past and present problems are assessed comparatively in case environments. As the authors further note, knowledge- and case-based models are especially useful, if the research is a qualitative one supported by quantitative data and analysis.

Rovelstad (1994) lists some of the benefits and disadvantages of model development as follows:

Benefits of models are that they:

- force early organisation of information, identification of potential problems, and location of information gaps needed;
- enable management to reduce the number of factors of uncertainty on which subjective judgement must be used;
- increase understanding of the operational environment(s), and;
- reduce risk and probability of wrong decision.

Disadvantages, on the other hand, are that:

- management acceptance is imperative;
- limitations of the models must be identified and understood in interpretation of results;

- models, especially quantitative, are derived from empirical information, and therefore have to be updated and revalidated as environments change;
- limitations in data, especially in the travel industry, may be difficult to overcome, and;
- the simplest useful model probably is best, while the level of complexity should increase, as problem is more fully defined.

Ideally, any marketing model should embrace robustness, ease of control, simplicity, completeness of relevant detail and suitability for communication to gain above listed benefits (Wober, 2003). However, various factors affecting the existence of a product in the market also influence the implementation of the marketing model developed for the product. Such factors range from the political changes of governments to emerging consumer trends according to technological developments (Yavuz et al., 2005). That is mainly why marketing models should be considered as dynamic procedures requesting constant and periodic monitoring and revaluation. Such uncertainty of competition is attempted to be minimised through the identification of interconnected and logical steps of marketing models.

Therefore, the following steps of developing a *"knowledge- and case-based"* marketing model are adopted in this study in light of the research objectives and methodology used (Leeflang and Wittink, 2000; Brodie and Danaher, 2000; Wober, 2003; Van Bruggen and Wierenga, 2001). However, the last two steps of the model development concerning implementation and updating are not carried out due to the main focus of research and its limitations:

1) Identification of the problem;
2) Selection of the case studies;
3) Data collection;
4) Analysis of research data;
5) Development of the conceptual framework;
6) Classification of the findings;
7) Development of the model;
8) Implementation of the model; and
9) Revaluation of the model and suggestion for updates.

In order to produce an applicable and effective marketing model, therefore, after the completion of the in-depth interviews and field studies, a life cycle analysis, a carrying capacity analysis and a SWOT (strengths, weaknesses, opportunities and threats) analysis were applied to each of the individual case study cities in this research. This is mainly because of the common assumption that at the different stages of a destination life cycle, different marketing strategies and policies are required, depending on the threshold of carrying capacity and the strengths and weaknesses of the destination (Prideaux and Cooper, 2002). Tourism organisations should develop their marketing strategies according to the findings of these three different analyses, which will facilitate the aim of achieving the desired goal or improving unacceptable conditions, and assess the balance between the demand and supply sides of the tourism sector.

Existing research and statistical data on visitor numbers, length of stay, visitor expenditure, degree of competition both within the city and with other cities, reinvestment and upgrading of infrastructure, distribution channels, environmental and social problems of the tourism sector, accessibility of destination, visitor characteristics, attraction clusters in each city and profitability of the sector were analysed as far as possible combined with the findings of in-depth interviews. Through these analyses, a conceptual framework for understanding changes in the case study cities is hoped to be provided. However, it is not the aim of the research to prove that the life cycle graphics of the case study cities match with the classic S-curve. Instead, the life cycle analysis is used to understand the tourism development process in each city and to define the time periods when the sector has been affected by several changes. For this reason, each case study city is assessed individually and the coverage of existing data includes a historical analysis of tourism statistics.

While the proposed model is based on such information gathered, some suggestions are made for the optimal marketing of Istanbul as a tourist destination. However, as noted above, since such a dynamic model requires an on-going assessment of the destination and its tourism sector, the suggestions can only be appropriate at the time of writing this thesis and, cannot be taken as imperishable recommendations for future problem-solving and decision-making mechanisms.

To conclude, in a world flooded by data and increasing tendencies toward customisation, there are many opportunities to use marketing models for decision-making (Leeflang and Wittink, 2000). The need for marketing models is especially apparent for tourist destinations, since their complex and multifaceted nature requires tailor-made solutions for decision-making to be implemented in heterogeneous and highly competitive tourist markets. By emphasising the importance of collective marketing in tourism, this research aims to highlight the crucial prerequisites of successful city marketing through the analysis of literature review and primary data collected in three destinations. While the knowledge- and case-based model should help policy-makers and city marketers to consider uniform marketing concepts, the identification of product-, management- and promotion-based strategies can only be specified according to the distinctive characteristics of individual urban areas and can be implemented through systematic planning and strategic marketing practices.

5.6. Conclusion: Limitations and Recommendations for Future Research

The limitations of the present research can be looked at from two different perspectives: (1) limitations regarding the research subject and; (2) limitations regarding the research methods used for data collection. To start with, despite the fact that the research has lasted just about eight years, the concept of the research subject which combine all aspects of the tourism sector and its relationships with other urban networks and key players in an urban environment is somewhat complicated to be defined within a specific time period, the bulk of the fieldwork ceasing by mid-2001.

As cities are evolving and dynamic networks, studies on urban areas require on-going and systematic approaches for constant updates on the research issues, not the least being the crisis management situations that have arisen since 9/11 (Glaeser and Shapiro, 2002). Hence, while this research provides a stance on the marketing activities of city destinations, its concept can be developed further with more focused research on the particular aspects of destination marketing, such as image marketing of city destinations and marketing partnerships in city destinations. However, since the major aim of this research is to develop a marketing model for urban areas, an approach to combine all counterparts of the tourism sector has been favoured and adopted.

As mentioned earlier, focus on the supply side of the sector can also be considered as a limitation. This emphasis was mainly due to the diversity of urban tourism on both the supply and demand sides and also to the difficulty of conducting primary research on various market segments of three destinations in different countries. Given the time and financial restrictions of the present research, it was unfeasible to design, apply and analyse a survey of urban visitors in the case study cities. In fact, there is a particular need for further research on the demand side of urban tourism, since the majority of the existing literature investigates either the management or the supply side of tourism in city destinations. There are few research which, as descriptive studies, strive for the emerging urban tourism concepts.

With regard to the research methods used, each has its own advantages and disadvantages. For instance, in-depth interviews are criticised for various biases caused by interviewer, interviewee or the interview environment (Arksey and Knight, 1999). More on the limitations of research methods used for this investigation is provided in the earlier sections, which investigated each method separately. As also explained in the chapter, some precautions are taken to mitigate possible occurrence of errors during the primary data collection. The most important of those was to adopt a triangulation approach *–i.e. literature review, in-depth interviews and multi-site case studies-*, which suggests combining various methods in order to mitigate their disadvantages.

Epistemological implications of the current research, meantime, can be assessed from the perspectives of research methods selected to investigate the research topic, and also from the particular characteristics of the research field. To start with, the primary data of this research strongly relies on in-depth interviews conducted in three different cities. While such an approach helps to present an exclusive information on how stakeholders perceive the management and marketing of their overall tourist product, differences and similarities between the comments of the interviewees from three different cities provide insight onto the concepts of urban tourism in general and of city destinations as marketable offers in particular. Multi-site case analysis, in this perspective, helps to draw uniform issues that were found in the primary data findings from all cities.

As mentioned in Chapter 2 and 3, there are various research in the fields of destination marketing and urban tourism in the existing literature. However, a close analysis of these studies shows that most of them focus on particular aspects of tourist destinations, such as competitiveness, destination marketers and the importance of partnerships in marketing and management of city destinations. Approaching the research field from a broader perspective to cover most of these issues were attempted in this research in order to form a marketing model. While providing a detailed analysis of a single destination clearly requires further data collection than the data used for this thesis in order to suggest complete and exclusive recommendations on the management and marketing of tourist packages, the analyses made are hoped to provide the basis for future comparative studies to better understand urban tourism issues such as the classification of city destinations and marketing activities of leading tourism authorities. In fact, although comparative studies exist in the literature, a uniform marketing model based on the primary findings from multiple cases has not been developed previously.

Most importantly, the selection of the interviewees from sub-industries of each city enables readers to understand how cooperative marketing strategies can be formed with the participation of all stakeholders, and what concerns and expectations are likely to be raised by sector stakeholders during the planning process. Finally, the application of a grounded theory throughout the thesis, in which interview results are compared and supported by the secondary data, may help researchers discover gaps in the existing literature as in the need for more studies on the demand aspect of city destinations. Using a software program to code results and to create networks, meantime, enhances the validity of the research, which was destined to be explored through qualitative research methods due to the nature of the research topic.

CHAPTER 6. AMSTERDAM, LONDON AND ISTANBUL AS TOURIST PRODUCT PACKAGES

6.1. Introduction

This chapter is designed to assess the case study cities as destination products. It can be argued that systematic and coherent marketing planning can only be executed following a thorough analysis of the product in question. Therefore, product life cycle analysis, carrying capacity analysis and SWOT analysis are applied to the cities with support of existing data in order to assess their offers as marketable commodities. While the analyses rely on both primary and secondary sources, they present similarities and differences between the findings from these two data collection methods. As a result, the following sections, arguably, hint at the current dilemmas and opportunities faced by the tourism sector as perceived by sector stakeholders in Amsterdam, London and Istanbul as well as their coverage or neglect by decision-makers and city marketers in strategic development and marketing plans. Following the life cycle and SWOT analyses, the carrying capacity analysis is dealt under four headings: the accommodation sector; tourist zones and crowding; seasonality, and; the quality of life in the cities concerned.

6.2. Life Cycle Analysis

As discussed in section 3.5.1.2, the life cycle analysis cannot be used as an assessment method on its own, as it has its limitations. Firstly, the coverage of statistical information may not match the required long-term evaluation. Secondly, internal and external factors, which sometimes have enormous impacts on the tourism sector, should be investigated, if a sensitive analysis is to be presented that exposes the evolution of the sector in any destination. It is even more difficult to examine the complex structure of product packages offered in urban destinations. Yet it is possible to detail the life cycle analysis of a city destination by evaluating both the impacts of all kinds of statistical information available on its tourism sector and the influence of external factors caused by either the supply or demand side.

When analysing the overall tourist product of a city destination, an insight into the analysis can be provided by looking at: the growth of different market segments; the share of competitors in the market; changes in visitor attitudes; a comparison of the life cycle of tourism with other economic sectors; the evolution of tourism policies over the years; and an analysis of the life cycles of different sub-products offered to visitors. However, the aim of carrying out life cycle analyses in this research is not to support the existing life cycle models in the literature or to provide similar life cycle patterns to prove the qualification of the case study cities' status as destination products.

Instead, the analyses are applied to understand the evolution of the tourism sector in each city through specific time periods. The analysis is considered as a *'diagnostic tool'* (Hart et al., 1984), and its utilisation is limited by the employment of some general visitor statistics, which are compiled mainly from the annual visitor surveys. In addition to time and financial restrictions on the research, comparability of statistical data gathered in each city inhibits further detailed evaluation. Still, it should be mentioned that the available statistical data on London are more detailed and cover a longer period of time than the other two case studies. Therefore, the analysis of the tourism sector in London provides a more in-depth approach.

Since the analysis theoretically suggests that each stage of a destination life cycle differs from each other with distinctive market characteristics and requires different marketing strategies and tools, the interviewees of the research were asked at what stage they consider their city to be in its tourism life cycle. The results of the interview findings are also provided in the following sections in order to compare the statistical analyses with the opinions and beliefs of the interviewees. This, to a certain extent, mitigates the statistical dominance of London, as the interviewees who are selected among the major decision-makers and marketers of the cities are presumed to have extensive knowledge of the current situation and evolution of the sector.

6.2.1. London: A Mature Product

The most important aspect of the life cycle analysis with regard to tourist destinations is to decide on the time period to be covered and the year to start. This is even more difficult for the case study cities of this research, as they have always enjoyed a sufficient number of travellers due to their importance as trade, administration, education and culture centres throughout their history. While it was mainly merchants and upper-class leisure travellers who were attracted to the cities before and during the 18th and 19th centuries, the start of mass tourism after the Second World War resulted in increasing domestic and international visitor numbers to all three, albeit with differences in volume.

In London, despite the fact that the city had boarding houses and hotels established far earlier than the 20th century, demand for recreational trips was limited with 500,000 international visitors staying at least one night in the capital city in 1950. (Bull and Church, 1996). Bull and Church cite the reasons for the low volume of visitors in those early years as a lack of variety of accommodation facilities and expensive and unsuitable transport modes for long distance travel. They note that London started to experience an immense growth in visitor numbers with better supply-side services available for both domestic and international visitors following the Festival of Britain and the opening of Heathrow and Gatwick airports in the 1950s.

The number of international visitors almost doubled in the early 1960s and this growth continued, reaching almost 5 million international visitors by 1970. However, such accelerated growth was not sustained either in the 1980s or in the 1990s. Table 6.1 shows that international visitors increased from 1980 to 1990 by 40% reaching 10.3 million international visitors by 1990, and only by 28% between 1990 and 2000, with an estimated 13.2 million international visitors in 2000. An important point to be noted here is that because the provider and the method of data collection altered in 1989, the comparability of pre- and post-1989 data may be misleading.

Given that domestic visitor figures rely entirely on rounded estimates, the reliability of the data becomes even more controversial. In fact, the change in the number of domestic visitors is particularly distinctive after 1989. In one year, the figure falls from 12 million to 9 million domestic visitors (*see Appendix 9*). Thus, the life cycle analysis of London's tourist product is firstly applied to international visitor figures in this research. This is due to the extended coverage of data on international visitors from 1963 to the present day, and the relatively similar data collection methods used.

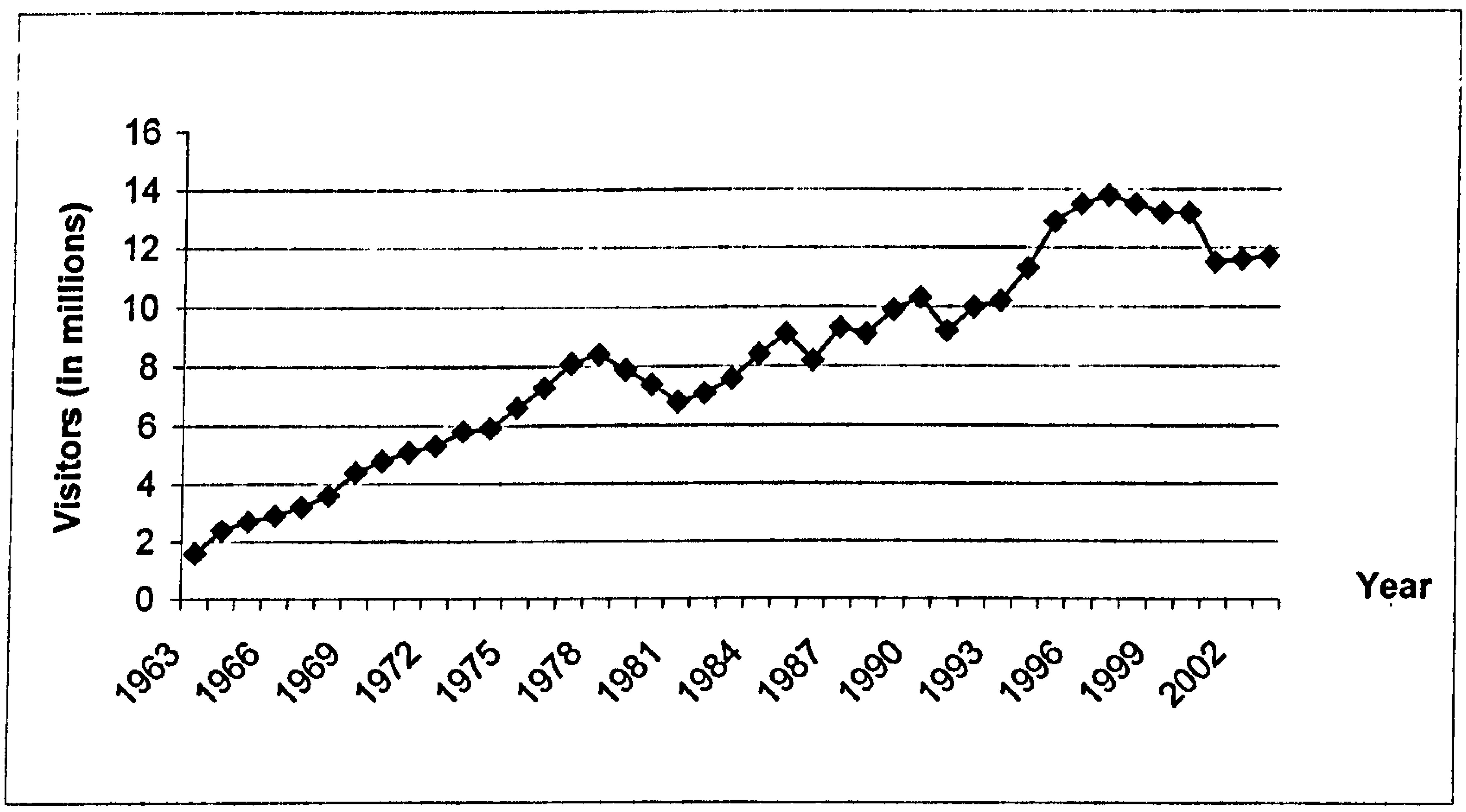
Table 6.1. International Visitors to London (all in millions)

Year	International Visitors	Year	International Visitors
1963	1.6	1984	8.4
1964	2.4	1985	9.1
1965	2.7	1986	8.2
1966	2.9	1987	9.3
1967	3.2	1988	9.1
1968	3.6	1989	9.9
1969	4.4	1990	10.3
1970	4.8	1991	9.2
1971	5.1	1992	10.0
1972	5.3	1993	10.2
1973	5.8	1994	11.5
1974	5.9	1995	12.9
1975	6.6	1996	13.4
1976	7.3	1997	13.5
1977	8.1	1998	13.5
1978	8.4	1999	13.2
1979	7.9	2000	13.2
1980	7.4	2001	11.5
1981	6.8	2002	11.6
1982	7.1	2003	11.7
1983	7.6		

Source: LTB and VLL statistics.

As can be seen in Figure 6.1, international visitors to the city have increased to the present day, even though the increase rate has slowed down in recent decades in contrast to the *'boom years'* of the sector in the 1960s. Despite the consistent increase in overall international visitors in the 41-year period of the analysis, the upwards-moving line of growth was interrupted on several occasions due to the change in data collection methods in 1989 and the recession between 1979-82, which was caused by the oil crisis affecting the whole world. In 1986, terrorist activities hampered inbound tourism, while growth was hit once more between 1990-91 by the Gulf Crisis, which particularly discouraged North American visitors from travelling to Europe and the Mediterranean. The 1997 crisis in Asia diminished the potential of the generator markets of Japan, South Korea, Malaysia, Indonesia, Taiwan and Thailand. A report by the LTBCB (2001a) also states that the foot and mouth disease and the strong pound as opposed to the currencies of major market generators such as West European countries and the USA, affected the sector negatively in 2000 (LTBCB, 2001a). More recently, the 11th September terrorist attacks in the USA followed by military actions against Afghanistan and Iraq hit the sector worldwide in 2001. The number of international visitors dropped remarkably soon after the attacks and is yet to recover and rise up to its pre-attacks level.

Figure 6.1. International Visitors to London Between 1963-2003



When the analysis is repeated with the inclusion of statistical data on domestic visitors, it becomes even more obscure (*see Table 6.2*). Figure 6.2 shows both the international and domestic visitor arrivals to London between 1975-2000. As explained earlier, due to the change in the source of data, a dramatic decrease in domestic visitor arrivals occurs in 1989. While the figures pre-1989 come from the BTSM (British Tourism Survey-Monthly), the post-1989 data are combined from the UKTS (The United Kingdom Tourism Survey). In contrast to the BTSM's rounded estimations, the UKTS developed a survey method to be conducted on larger sample sizes in order to measure domestic tourism with a greater degree of precision. Therefore, despite the known fact that domestic visitors to London declined in the early 1990s due to the economic crisis induced by the Gulf War, a drop of 3 million visitors in one year, *-i.e. from 12 million visitors in 1988 to 9 million visitors in 1989-* is misleading and does not reflect the reality.

Table 6.2. International and Domestic Visitors to London (all in millions)

Year	International Visitors	Domestic Visitors*	Total Visitors
1975	6.6	9.1	15.7
1976	7.3	9.6	16.9
1977	8.1	9.3	17.4
1978	8.4	9.0	17.4
1979	7.9	9.2	17.1
1980	7.4	10.1	17.5
1981	6.8	9.9	16.7
1982	7.1	9.6	16.7
1983	7.6	10.5	18.1
1984	8.4	10.7	19.1
1985	9.1	10.0	19.1
1986	8.2	10.1	18.3
1987	9.3	10.5	19.8
1988	9.1	10.5	19.6
1989	9.9	9.0	18.9
1990	10.3	7.0	17.3
1991	9.2	6.5	15.7
1992	10.0	7.0	17.0
1993	10.2	7.2	17.4
1994	11.3	8.6	19.9
1995	12.9	10.4	23.3
1996	13.4	12.2	25.6
1997	13.5	12.8	26.3
1998	13.5	11.6	25.1
1999	13.2	14.8	28.0
2000	13.2	15.1	28.3
2001	11.5	16.9	28.4
2002	11.6	16.1	27.7
2003	11.7	14.3	26.0

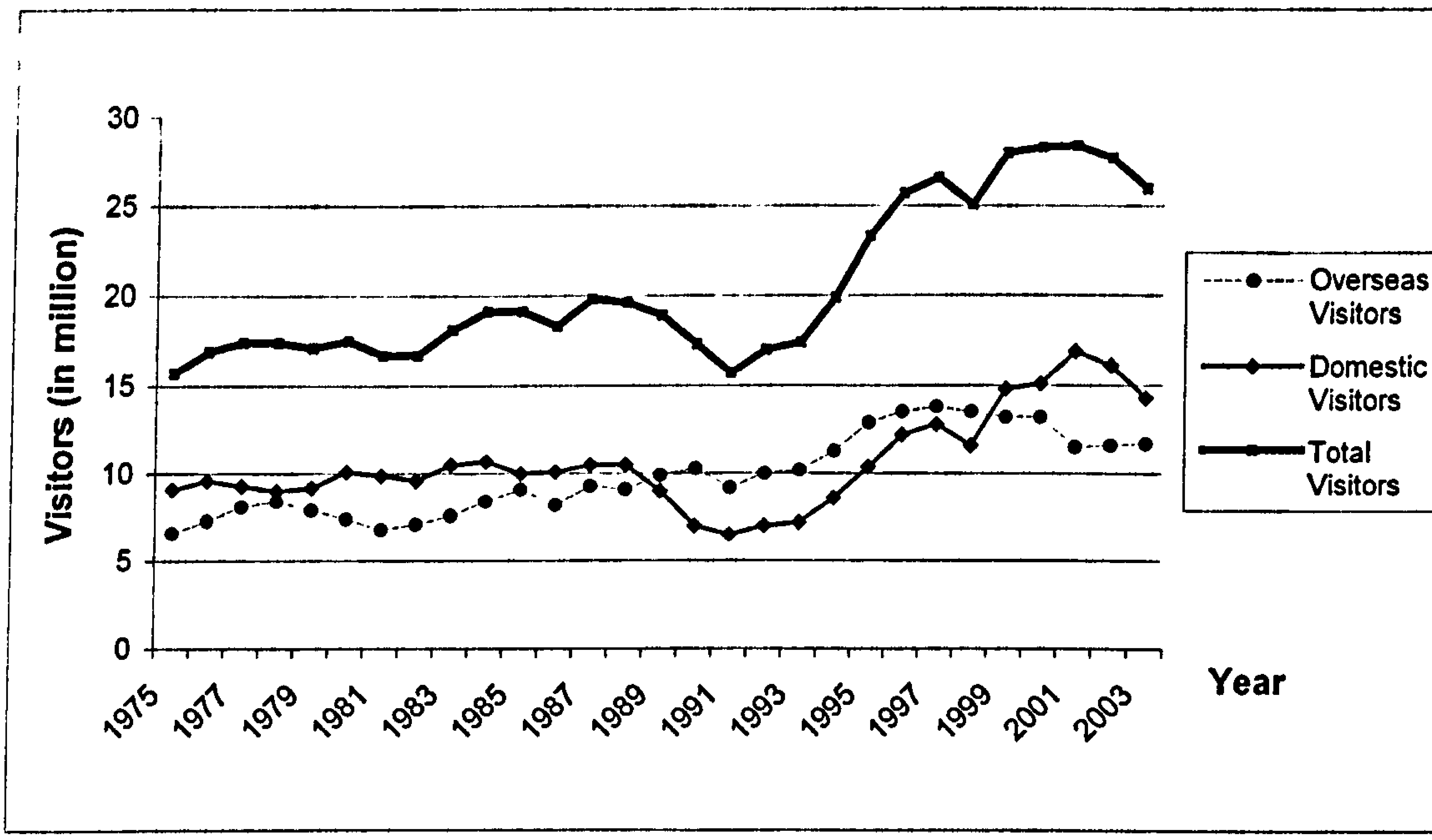
* Re-estimated figures for domestic visitors to London (*please see Appendix 9*)

Source: LTB and VLL statistics.

In order to provide a better representation of domestic tourism, therefore, visitor numbers to London between 1975-89 are re-estimated by forming some assumptions according to the tourism trends supported by both the BTSM and UKTS statistics (*see Appendix 9*). According to the new estimates, London may have received a stable amount of domestic visitors between 1975-89 at an average of 9.8 million visitors a year. Figure 6.2 shows that even with these re-estimated domestic visitor numbers, total visitors to London do not draw a graphical pattern, which could be explained easily by the life cycle theories. Besides, the brevity of the time scale of the available statistics on domestic visitors covering the past 29 years indicates a risk of encompassing fewer life cycle stages than Figure 6.1, which embodies a longer time period. This may be the reason why Figure 6.2 differs from the previous figure, with an indication of a continuous but slowly growing pattern. Such stable evolution is mainly because of the balanced growth of domestic tourism, with the exception of the crisis periods 1990-94 and 2001-02. Indeed, it is the change in the number of international visitors, which mainly shapes the fluctuations in overall visitor numbers in consecutive years, while the impact of domestic tourism is especially evident during crisis times.

Since each market segment attracted to any tourism destination evolves individually throughout the development process of the sector, it is not inaccurate to say that domestic and international markets to London have formed different growth patterns. Figure 6.2 implies that the domestic tourism market to London reached the *'consolidation'* stage long before the international markets. The smaller growth rate of domestic visitors postulates that the increase started to slow-down during the 1970s, whereas diminishing growth is a fairly recent event in the case of international visitor markets.

Figure 6.2. International and Domestic Visitors to London Between 1975-2003



Nevertheless, while the figure of international visitors has been somewhat stable around the 13.5 million visitors between 1996-2001, the UKTS figures suggest that domestic tourism has been growing steadily over the last ten years. While this might as well be interpreted as the possible outcome of the revised aims of the local and regional tourism organisations, which put more emphasis on domestic tourism than ever before, it would be inaccurate to draw conclusions on the status of London in its life cycle by just looking at the available statistics on these very broad market segments *-i.e. domestic and international markets-*.

In fact, it is not just domestic and international visitor markets, which show differences when displayed as life cycle graphics. Urban areas attract all kinds of visitors who may have different priorities, wants and needs, which can also change through time, hence reshaping the life cycle patterns for each market segment. In addition to the purpose of visit used as a criterion to divide visitors into segments, there are various other segments like young travellers, families, short-break European visitors and long-haul incentive groups. With new tourism developments occurring, the tourism policies of destinations can play an important role in attracting different market segments. While some market segments may be enhanced or ignored, new segments can be added to *'target lists'*. All these different market segments should be taken into account individually to provide a conclusive life cycle analysis. Nevertheless, such a complex and changing characteristic of demand inhibits the application of life cycle analysis in the field of tourism. In the case of London, and also in the other case study cities, detailed statistics on different market segments, unfortunately, do not go back far enough to cover long time series for the application of effective life cycle analyses of varied market segments.

However, in addition to the characteristics of various market segments and visitor arrivals, the expenditure and nights spent by visitors in London are also considered as important variables for analysis. For these analyses, the pre-2001 statistics will be used, since the terrorist attacks may mislead the analysis due to their nature as external factors affecting the tourism sector. When scattered on the time scale between 1963-2000, both the annual expenditure and the average expenditure by international visitors in London form curved-lines, which are very close to the traditional S-shape life cycle model. In fact, the column -a- of Table 6.3 suggests that the period 1963-74, which implies a growth at an average increase rate of 12.4% in international visitors expenditure, may be regarded as the *'involvement'* stage. In a similar way, the period 1975-95 can be seen as a *'development'* stage in which the average increase ratio rises to 13%. As growth becomes moderate after 1995 -*i.e. the average annual increase rate is just about 1% between 1995 and 2000*-, the period up to 2000 suggests that London's tourist product may have recently reached its *'consolidation'* stage.

The increase in expenditure in these figures may not reflect the reality. In fact, expenditure figures should be estimated according to the Real Price Index in order to demonstrate more accurate changes, which should be segregated from the effects of external factors. The columns -c- and -d- in Table 6.3 list the total and average expenditure of international visitors in constant prices for each year, estimated according to the following formula by selecting 1996 as a base year (*see Appendix 10 for the UK Real Price Index between 1963-2000*):

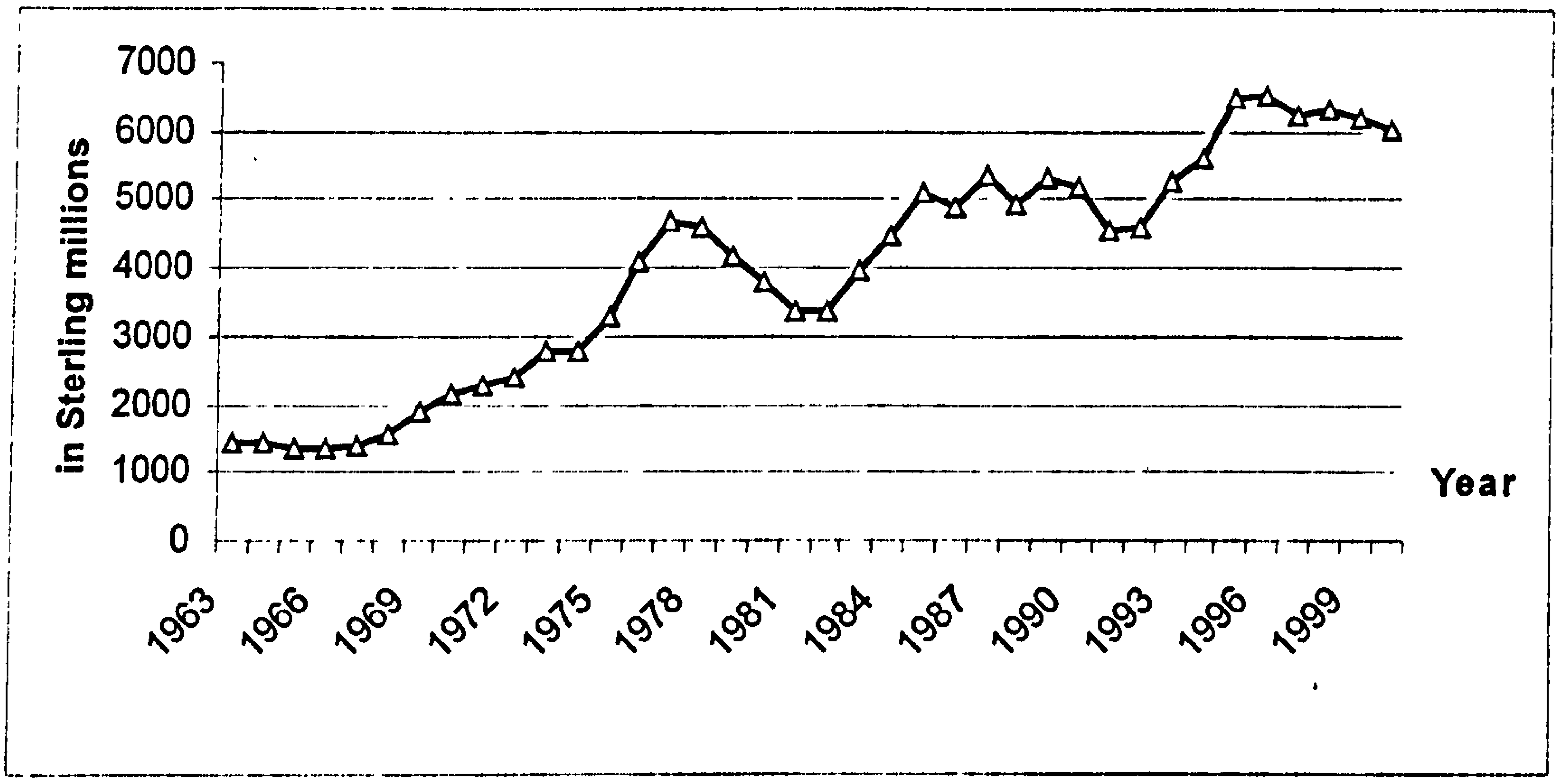
$$E_i = C_i \times R_i$$

E_i = Total or average expenditure of international visitors in year (i), estimated according to the real-price index, and 1996 as the base year.

C_i = Total or average expenditure of international visitors in year (i), and in current prices.

R_i = Real price index ratio (%) of the year (i) in comparison to the year 1996.

Figure 6.3. International Visitors Expenditure in London Between 1963-2000 (in Real Prices)



On completion of the real price estimations, it can be seen that international visitors' expenditure does not follow a constant increase in London. Figure 6.3 shows that the growth pattern was deterred with the decrease in visitor numbers especially during two distinctive time periods: between 1978-82 which coincides with the world-wide oil crisis and; between 1990-92 when the Gulf Crisis discouraged the North American market from visiting Europe. If such uncontrollable effects of external factors are ignored, it can be argued that the stages of the London's life cycle, which are, to a certain extent, clarified by the earlier figures, are also verified by the statistics of international visitors' expenditure. These stages, which are scattered on a 38-year time span, are; the involvement stage between 1963-74, the development stage between 1975-95 and, the consolidation stage between 1995-2000. In fact, the recent decline after 1998, both in the number of total international visitors and their expenditure, may as well be considered as showing signs of London reaching its stagnation stage.

Meantime, Figure 6.4, which exhibits the evolution of average expenditure per trip in the city, follows a stable, but declining pattern. The effects of the crisis periods can be distinguished in this figure too. While the average international visitor expenditure for the overall 38-year period is £510.8, the growth was interrupted when the figure dropped from £892.8 in 1963 to £598.1 in 1964. Given a uniform hypothesis of life cycle theories, which is that destinations attract high-income earners at the initial stages and move toward attracting visitors from every budget, hence reducing their average visitor income toward the consolidation stage, it can be argued that the indications of Figure 6.4 justify the fact that London has passed the involvement and development stages of its tourism life cycle some time ago. However, whether the recent decline in average visitor expenditures denotes a move from the consolidation to the stagnation stage, is subject to debate.

Table 6.3. Total and Average International Visitor Expenditure in London

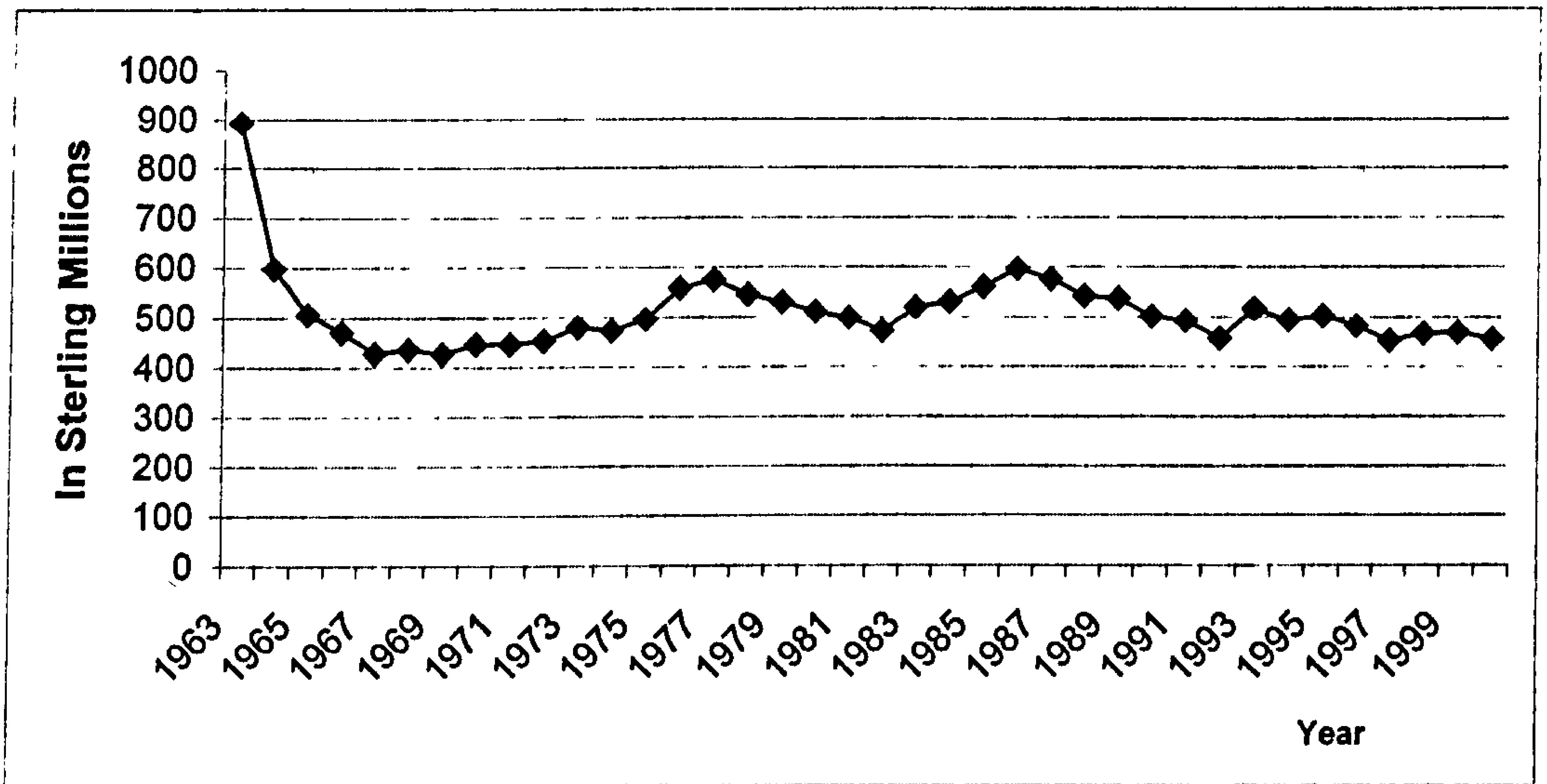
Year	Total International Visitor Expenditure (all in £ millions) (a)	Average International Visitor Expenditure -per trip- (all in £) (b)	Total International Visitor Expenditure* (all in £ millions and constant prices) (c)	Average International Visitor Expenditure* -per trip- (all in £ and constant prices) (d)
1963	140	87.5	1,428.6	892.8
1964	145	60.4	1,435.6	598.2
1965	145	53.7	1,367.9	506.6
1966	150	51.7	1,363.6	470.2
1967	155	48.4	1,371.7	428.6
1968	185	51.4	1,567.8	435.5
1969	235	53.4	1,880.0	427.3
1970	285	59.4	2,142.8	446.4
1971	330	64.7	2,275.8	446.2
1972	375	70.7	2,403.8	453.5
1973	470	81	2,781.1	479.5
1974	550	93.2	2,791.8	473.2
1975	750	113.6	3,275.1	496.2
1976	1,090	149.3	4,082.4	559.2
1977	1,440	177.7	4,660.1	575.3
1978	1,535	182.7	4,582.1	545.5
1979	1,590	201.2	4,195.2	531.0
1980	1,695	229.1	3,783.5	511.3
1981	1,700	250	3,393.2	499.0
1982	1,825	257	3,354.7	472.5
1983	2,250	296.1	3,954.3	520.3
1984	2,660	316.6	4,463.1	531.3
1985	3,230	354.9	5,102.6	560.7
1986	3,205	390.8	4,893.1	596.7
1987	3,575	384.4	5,359.8	576.3
1988	3,460	380.2	4,942.8	543.1
1989	4,015	405.5	5,324.9	537.8
1990	4,270	414.5	5,169.5	501.8
1991	3,965	401.6	4,536.6	493.1
1992	4,152	415.2	4,577.7	457.7
1993	4,860	476.5	5,276.8	517.3
1994	5,280	467.3	5,593.2	494.9
1995	6,336	491.2	6,491.8	503.2
1996	6,519	482.9	6,519.0	482.9
1997	6,449	477.7	6,255.1	453.3
1998	6,738	499.1	6,314.9	467.7
1999	6,708	508.1	6,193.9	469.2
2000	6,717	508.8	6,024.2	456.4

*Base Year 1996=100

Source: Based on tourism statistics of LTB and price indexes of Central Statistical Office.

It is important to note that the decrease in the expenditure figures between 1963-64 is also due to the extended coverage of arrival and departure points to the UK by the International Passenger Survey (IPS) after 1964. As Wanhill (1990) notes, although the survey was first conducted in 1961, and was maintained on a yearly basis until 1964, the first three years were considered experimental when the survey methodology was tested and made more reliable with an intensified data collection including more entry and departure points to the country. Hence, the decrease between 1963-64 is partly a result of the change in the data collection method and does not reflect the reality. The decrease in the later years, meantime, may be explained by global tourism trends such as reduced travel costs for potential visitors and shortened average stay in tourist destinations.

Figure 6.4. Average Expenditure of International Visitors in London Between 1963-2000 (in Real Prices)



One can even argue that the new tourism developments in some parts of London are the initiatives supported by tourism authorities to prolong the stagnation stage by proposed growth and to move the city into a rejuvenation stage rather than decline. This is what two of the interviewees in this research said;

> *"Competition is always fierce. But I think that London, with some of the new developments like the Millennium Dome, the National Stadium, which is being built in Wembley, Shakespeare's Globe Theatre and the other major Lottery developments including the Tate Gallery at Bankside and Royal Opera House, is going to keep its place in the market... These new developments will keep London fresh, together with its heritage and Royal Palaces" [London Interview: 13].*

> *"I think London is at its saturation phase in the life cycle. But spreading visitors across the city, and throughout the year, it can continue to attract visitors. The efforts to develop new attractions in the South and East of the city, therefore, should be supported by future governments" [London Interview: 10].*

As Agarwall (1993) notes, through re-orientation of core products, the introduction of new attractions in new tourist zones and the application of urban renewal projects, possible decline may be offset, and varying degrees of rejuvenation may be stimulated. Therefore, such new developments, which are mainly concentrated along the banks of the River Thames and in the outer boroughs where tourism is used as a catalyst to revitalise a derelict urban environment, may help London maintain its competency in the market and prevent its tourism sector from reaching the *'decline'* stage.

However, there is not enough evidence to support such a hypothesis in this research due to the short period of time covered by the analysis and the recent appearance of decline in both total and average expenditure of international visitors. It is yet to be seen whether these new attractions will give London an impetus to accelerate its visitor numbers and tourism income in the following years or whether they will just guarantee the leading position of the city in the international tourism market by extending the consolidation stage for several more years.

Overall, the time period covered for this research may be a limiting factor since the life cycle of London is not necessarily encompassed within a 41-year period. However, the sets of statistical information from the earlier years, which should parallel information from recent years in terms of the way they are presented and described, do not exist. As the establishment of the London Tourist Board in 1963 made it easier to obtain statistical information, the time span of the analyses commences with the year 1963. Hence, the exploration stage can only be presumed to have been the time period before the 1960s, when few travellers visited the city. As mentioned earlier, London had low volumes of visitors before the 1960s, which endorses the idea that the coverage of those earlier years would have been of minimal significance to the analysis. Some important dates with regard to the tourism sector in London are listed in Appendix 11 in order to provide more insight into the evolution of the tourism sector in the city. It is thought that these dates may help clarify the analysis and its proposed stages further.

Nevertheless, given the patterns displayed in the above figures, it is still not easy to say what stages the London tourist product has been through in its life cycle, and what stage it is currently at. However, it is obvious that the total tourist product of London has already left its involvement stage, which according to some of the above figures, may coincide with the period 1963-75. The analyses that mainly rely on the statistics available for international visitors underline the fact that the development stage may have been the period 1975-94. So, at present, London can be considered to be in its consolidation stage. The decreasing growth rate since 1995, new attraction developments, institutionalisation in the sector and emerging partnerships among tourism organisations to improve and promote the city in international markets, befit the characteristics of the consolidation stage.

In his work, which looks at the life cycles of 43 different European city destinations, Grabler (1997) notes that among the variables tested, a diminishing rate of first-time visitors has a significant correlation to empirical life cycles and indicates that a city is passing through later stages. According to this assumption, London, where repeat visitors account for 60% of all visitors, falls into the group of cities at the consolidation stage, together with Vienna, Paris and Hamburg.

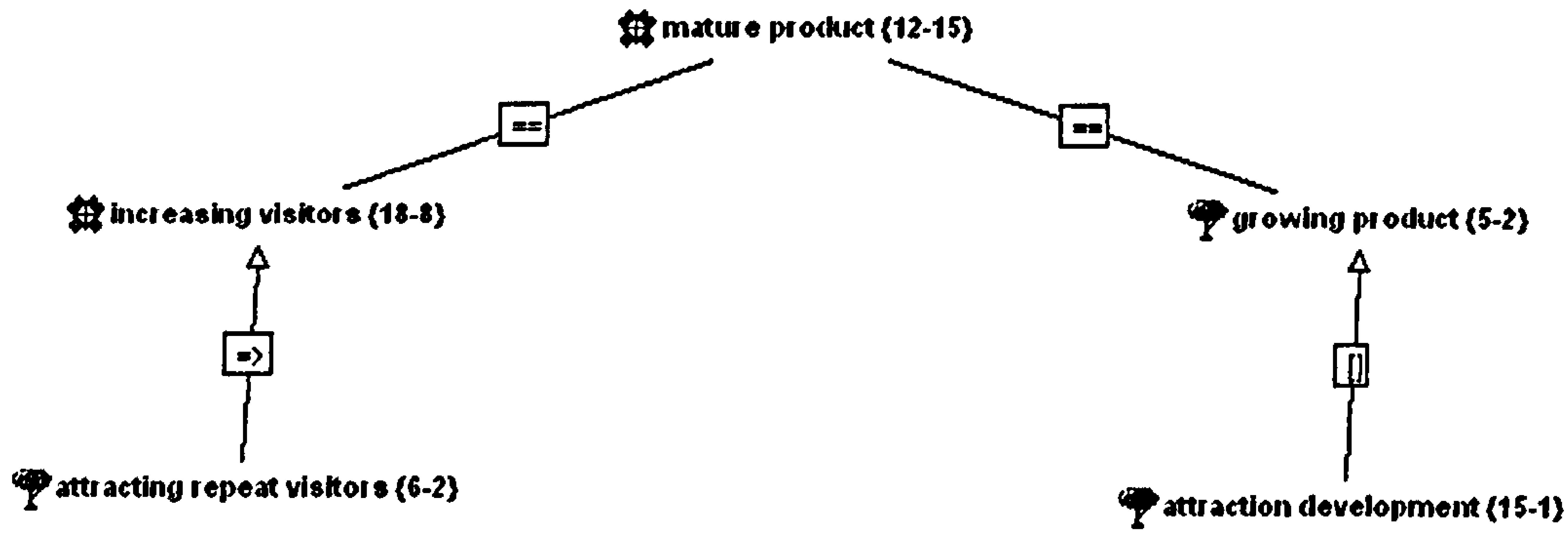
Although the indications of the consolidation stage seem explicit, the signs may well disguise the real position of London in the life cycle. It is a fact that the later stages of the cycle tend to be more significant due to the implications for tourism in general and for the planning and development of tourist areas in particular. But it is definite that London is at a stage where an increase in visitor numbers has slightly slowed down, but it has kept on a stabilised and constant level with not too many fluctuations occurring over the years. The consistent growth of the tourism sector in the city can be explained by the fact that product packages appealing to wider market segments have longer life cycles than the ones orientating to narrow markets (Agarwall, 1993).

The interview findings regarding the status of London as a tourist destination in its life cycle, support the findings of the statistical analysis. Figure 6.5 shows the codes mentioned most by the London interviewees on the topic. In addition to the codes, *-i.e. 'mature product', 'increasing visitors'* and *'growing product'-*, which are directly related to life cycle analysis, other codes *-i.e. 'attracting repeat visitors'* and *'attraction development'-* are also included in the figure, as they are associated with the characteristics of the consolidation stage. The recurrence of the later two codes *-i.e. they are coded 6 and 15 times respectively-* is considered to underline the fact that London is no longer at its involvement or development stage.

The common belief of the interviewees is that London has sustained its place in the international tourism markets as a mature product. While the majority of the interviewees perceive the overall tourist product package of the city as a growing product with increasing visitor numbers, some concerns were raised regarding the future stability of the tourism sector in the city, as decline is foreseen unless the leading authorities take necessary precautions. Such views include the following:

> *"It is the secret of the market. There is always going to be some point when there is a drop in visitor numbers. LTB and BTA were projecting straight-line growth two years ago, and they are projecting straight-line growth for the next five or ten years. No business is like that. There are a lot of factors working against it and the numbers have now slowed. During this year in particular, all the hotels working in the weekend-break market have had space available" [London Interview: 8].*

Figure 6.5. The Tourist Product of London: A Mature Product



"Visitor numbers are increasing. The pound is very strong at the moment, which does not help... But people are still coming... People are fairly confident that there will be an increase this year over last year. We would certainly be hoping that would continue after the millennium. But you cannot just sit back and watch the growth continue forever" [London Interview: 4].

"There is a perception that London is doing very well, and it does not need to do much. There is not any problem and it will go on like that. That is entirely wrong" [London Interview: 12].

To conclude, the characteristics of the consolidation stage, as listed by Butler (1980), suit the current position of the city's overall tourist product. These characteristics include: slowed down growth; total visitors exceeding permanent residents; tourism-oriented economy; extensive use of marketing and advertising; occurrence of partnerships; and well-defined tourist districts. Moreover, as it is the case in many urban areas, with too many tourist attractions, services and facilities available in the total product package, London is more likely to retain its market share in the near future providing the execution of strategic planning and marketing applications by the concerned bodies. However, fierce competition in both the international and the national markets and the emergence of crises mean that London should not solely rely on its *'leading city destination'* status, but should plan for the future of the sector by combining different views of the shareholders to improve the overall product.

If collaboration is not established between the shareholders, decline may emerge as a result of commercialisation and quality deterioration. Further diversification of tourist products and segmenting the market according to demand characteristics may also become imperative, as mass tourism is likely to be transformed into individuals travelling for personal achievement by fulfilling specific needs and wants. By differentiating tourist products according to the needs and expectations of individual market segments, the consolidation stage can be expanded to an extent that decline never occurs.

6.2.2. Istanbul: A Developing Product

The earliest statistical information on international visitors to Istanbul does not go back in time any further than the 1970s. These statistics, which are compiled by the State Statistics Institute (DIE), are rather limited to the numbers of foreigners who either arrive to or depart from Istanbul as an entry or final point of their trips to Turkey. Therefore, although it is a well-known fact that Istanbul has been an important destination as a gateway to the Oriental World on the doorstep of Europe throughout its history, the life cycle analysis of the city's tourism product package is limited to the utilisation of some available statistics in this section. The time period covered by the overall analysis is, however, extended with further estimations based on some assumptions about the overall characteristics and trends of the Turkish tourism sector and the share of Istanbul in national tourism business during the early days.

There seems to be a consensus in the existing literature that Turkey has only been an important tourist destination since the 1980s (O'Reilly, 1993; Uysal and Crompton 1984; Baki, 1990; Dincer and Dincer, 1999; Goymen, 2000). The main reason for an underdeveloped tourism sector before then is related to the social and political unrest during the 1970s, which gave rise to labour strikes, high inflation rates and anarchic conditions. Although international visitor numbers increased by 70% between 1953 and 1960, the overall figure for the whole country was still at around 590,794 international visitors in 1970. With an increase of 57%, this figure went up to 918,430 international visitors in 1980 (DIE, 1994).

When the political upheavals of the 1970s were followed by a military coup in 1980, the country entered a new era in the direction of political, social and economic liberalisation (Seekings, 1989). Although the Ministry of Tourism was established in 1965 in order to improve the wellbeing of the sector, it was not before the 1980s that the Government showed a real interest in developing tourism in order to counteract severe economic problems through this *'catalyst'* and *'income earner'* sector. Government initiatives after 1983 to mitigate the drawback of limited accommodation supply especially on the southern and western coast of the country, resulted in many small fishing villages emerging as *'holiday resorts'*, attracting mass tourism mainly from Western Europe. While international visitor arrivals increased by 93% between 1983 and 1988, reaching 2.5 million international visitors by 1988, the comparative economic and political stability of the country during this decade in contrast to the 1970s, assured the status of Turkey as a newcomer in the international tourism market and especially among the Mediterranean *'sun-sea-sand'* destinations.

While the hotel developments induced by the Government initiatives mainly occurred in the coastal areas along the Aegean and Mediterranean Seas in the 1980s, major urban areas like Istanbul, have witnessed the opening of accommodation establishments mainly built to serve the high end of the market. This led to increasing international visitor arrivals to Istanbul (*see Section 6.4.1*). Table 6.4 shows that international visitors to the city increased by 107% from 1980 to 1990, reaching over 1 million visitors in 1990. The average per annum growth in this decade was 11%. Although the Gulf Crisis interrupted this immense growth and caused visitor numbers to drop by 42% in 1992, the growth flourished by a 159% increase from 1992 to 2000.

Table 6.4. International Visitors to Istanbul

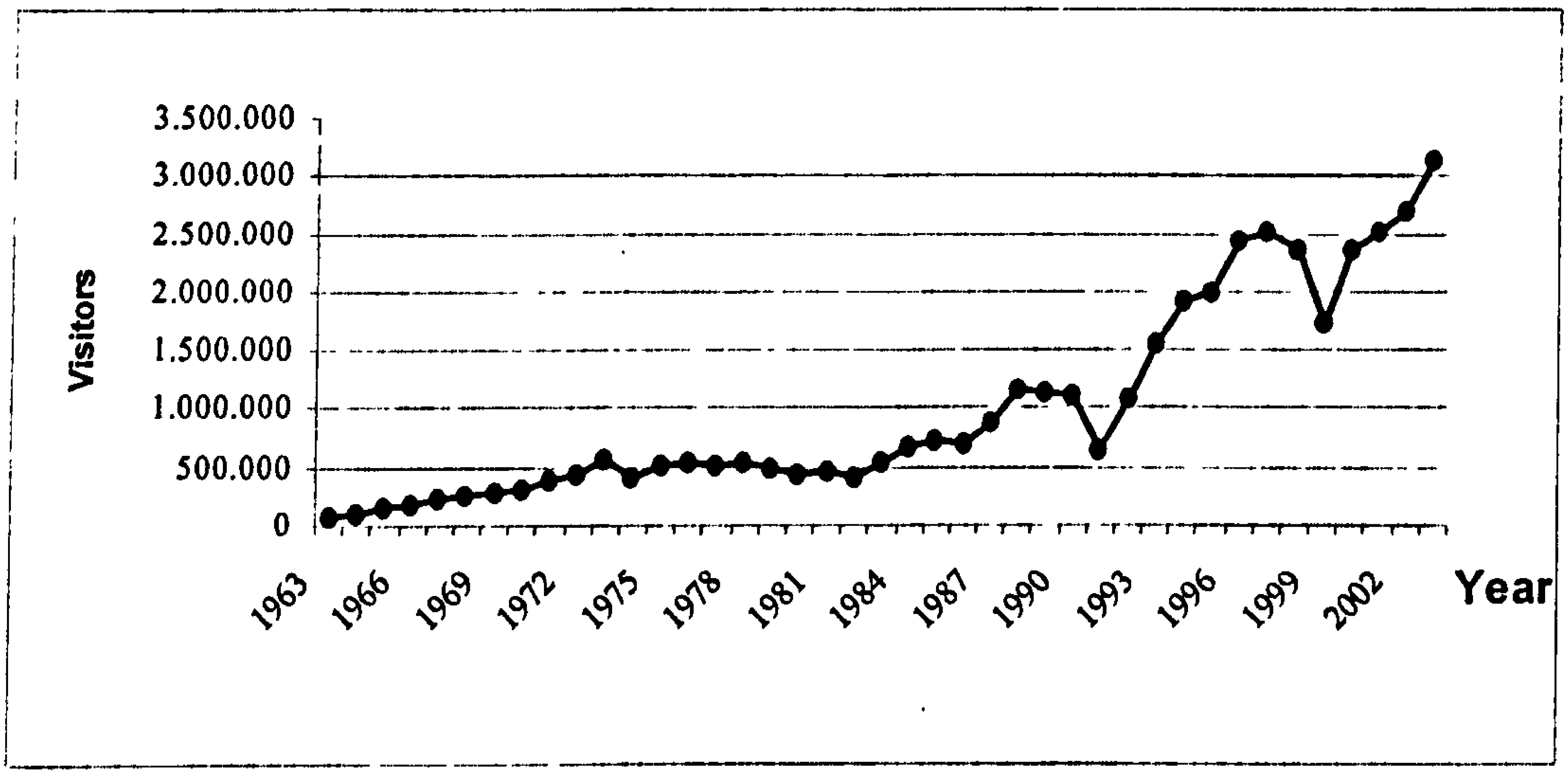
Year	International Visitors*	Year	International Visitors
1963	83,513	1984	686,306
1964	96,326	1985	720,727
1965	151,938	1986	712,074
1966	185, 024	1987	873,564
1967	241,103	1988	1,174,318
1968	253,258	1989	1,146,373
1969	291,576	1990	1,121,931
1970	304,409	1991	658,860
1971	388,928	1992	1,078,904
1972	434,681	1993	1,548,022
1973	563,064	1994	1,923,417
1974	420,309	1995	2,007,384
1975	506,582	1996	2,437,682
1976	535,900	1997	2,502,728
1977	506,907	1998	2,356,876
1978	545,316	1999	1,737,554
1979	492,794	2000	2,349,460
1980	429,542	2001	2,517,139
1981	470,495	2002	2,705,848
1982	406,851	2003	3,148,266
1983	554,092		

*Figures between 1963-1973 are estimated according to the assumptions made on the share of Istanbul from the overall international visitors to Turkey (*please see Appendix 12*).

Source: DIE Statistics.

When international visitor numbers are scattered on a diagram, the growth of international visitors to Istanbul in recent years becomes unmistakable. As Figure 6.6 indicates, while the growth was given an impetus in 1983, the annual visitor numbers could not surpass the threshold of 500,000 visitors a year especially during the 1970s. The conflict between Greece and Turkey over Cyprus and the occupation of the island by the Turkish military forces in 1974 affected the international tourism flow to the country and Istanbul reported a decrease in the numbers of international visitors by 26% in that particular year. The decrease in mid-1970s was also because of the oil crisis and its effects on national economies all around the world.

Figure 6.6. International Visitors to Istanbul Between 1963-2003



Growth after 1983 was interrupted on a few occasions. When the Gulf Crisis started in 1990 and affected the international tourism movement to Europe and the Middle Eastern region, the growth in international tourism to Istanbul reversed by a decline rate of 42% in 1991. The earthquake in Izmit, which is an industrial city in the close vicinity of Istanbul in the Marmara region, hit the Turkish tourism sector once more in 1999 and resulted in another remarkable decline in visitor numbers by 27%. Although the 9/11 attacks in 2001 seem to affect Istanbul less adversely than they did both Amsterdam and London, the press coverage of the terrorist attacks made by a Kurdish terrorist group in big cities and holiday resorts in Turkey discouraged European holiday-takers from visiting the country in the 1990s. Three of the major bomb attacks took place in the tourist districts of Istanbul -*i.e. the Sultanahmet Square in 1994 and 1998 and, the Grand Bazaar in 1994*- and meant that the tourism-related businesses operating in the city were severely hampered during the 1990s (Unur, 2000). As one of the interviewees of this research stated:

> *"Terrorist activities and political and economic conflict between various parties get prime-time coverage on the main news programmes of international television channels, which, as a result, ruin both the image of Turkey and the tourism sector" [Istanbul Interview: 15].*

Statistical information on the expenditure of international visitors in Istanbul is only available after 1990 and until 1999 (*see Table 6.5*). While the growth in international tourism income in the city reached a peak level at over 2 million US$ in 1997, it shows remarkable fluctuations especially during the Gulf Crisis and, right after the Izmit earthquake in 1999. Although the growth was presumed to be kept in line with the increase in visitor numbers until the present time, the authorities were yet to publish an accurate figure on international visitor expenditures covering the recent years at the writing stage of this research. Therefore, although the decline in 1999 is a sharp one, it should be treated as a short-term fluctuation caused by an external factor and not by the overall wellbeing of the tourism sector in the city.

In order to stretch the period covered in the life cycle analysis backwards in time, the figures between 1963-89 are estimated according to the trends and characteristics of the tourism sector in Istanbul and, to some assumptions about the share of the city from the national tourism income during the period concerned (*see Appendix 12 and Appendix 14*). The period for which the estimations are made is 30 years long and may not reflect the reality as much as it might have done with accurate statistics. However, the rather finite national tourism income before the 1970s supports the prediction that if real figures on the expenditure of international visitors had been available, they would have altered the city's life cycle analysis with minimal variations. In addition to the economic and social instability of the country during the early years of the analysis, a lack of infra- and supra-structure facilities also supports the presumption that Istanbul has only recently reached its *'development stage'* (Baki, 1990; Seekings, 1989).

In order to provide a more accurate analysis, with the elimination of the effects of external factors, the total expenditure figures were re-appraised according to the Real Price Index (*see Section 6.3.1. for the formula used for estimations*). Although the fluctuations and overall growth pattern in Figure 6.7 match the earlier figure, they also display variations during economic crises, which forced Governments to devaluate Turkish Lira against foreign currencies. Thus, in addition to the decreases by 56% in 1991 and by 35% in 1999 due to the above-explained reasons, the major interruptions in growth were experienced in 1983 by 9%, in 1986 by 19%, in 1990 by 14% and, finally in 1998 by 13%.

This explains why Figure 6.7 demonstrates downturns in growth in contrast to a rather balanced increase in visitor numbers. Another reason for the unparalleled growth rates displayed by the two figures is the change in the visitor mix of the city. As O'Reilly (1993) notes, especially after the 1990s, Turkey as a whole and Istanbul in particular, have started to attract visitors from Eastern Europe, who, in comparison to Western European and North American tourists, have limited holiday budgets, hence spending less. This argument is further supported by the retarded increase in the average international visitor expenditure in the city.

As Figure 6.8 displays, in comparison to the period between 1985-1991 when the average international visitor expenditure mainly remained over 500 US$, per capita expenditure slowed down after the Gulf Crises and could not reach the 1985 level of 572 US$, even when the total numbers of visitors reached record levels in 1997. The difference between the average expenditure figures of the initial periods of the analysis *-i.e. 1963-1983-* and the later phases marked by 58% and 47% increases in 1984 and 1985 respectively can be related to several factors. First, before the 1980s, the tourist services and facilities were limited due to a lack of interest shown by Governments in developing the sector. Therefore, international visitors could not be encouraged to spend more by participating in various attractions and activities.

Table 6.5. International Visitors Total and Average Expenditures in Istanbul

YEAR	International Visitors Expenditure* ('000$)	International Visitors Expenditure (all in '000$ and constant prices**)	Average International Visitors Expenditure -per trip- (all in $ and constant prices**)
1963	3.0	9.9	118.5
1964	3.3	10.7	111.1
1965	5.5	17.3	113.9
1966	4.8	14.9	80.5
1967	5.3	15.8	65.5
1968	9.6	27.6	109.0
1969	14.6	39.7	136.2
1970	20.6	52.9	173.8
1971	25.1	61.7	158.6
1972	41.5	99.0	227.8
1973	68.8	154.9	275.1
1974	63.9	129.4	307.9
1975	66.3	122.3	241.4
1976	59.6	104.3	194.6
1977	67.6	110.8	218.6
1978	76.0	115.7	212.2
1979	92.6	126.7	278.8
1980	107.8	130.3	303.3
1981	125.8	137.4	292.0
1982	111.1	113.9	308.0
1983	123.3	123.3	244.9
1984	252.0	242.1	388.0
1985	444.6	412.4	572.2
1986	364.5	332.9	467.5
1987	516.3	453.7	519.4
1988	706.6	596.3	507.8
1989	767.0	616.5	537.8
1990	688.1	527.7	470.3
1991	318.5	233.8	354.9
1992	555.2	395.2	366.3
1993	942.2	652.5	421.5
1994	1,244.4	838.5	435.9
1995	1,288.6	845.0	420.9
1996	1,500.0	955.4	391.9
1997	2,200.0	1,370.7	547.7
1998	1,952.2	1,196.2	507.5
1999	1,300.7	780.3	449.1

*Figures between 1963-1990 are estimated according to the assumptions made on the share of Istanbul from the overall international visitors to Turkey *(please see Appendix 12)*.

**Base Year 1983=100

Source: Based on the statistics of DIE and the Consumer Price Indexes of US Department of Labour.

Figure 6.7. International Visitors' Expenditure in Istanbul Between 1963-2000 (*in Real Prices*)

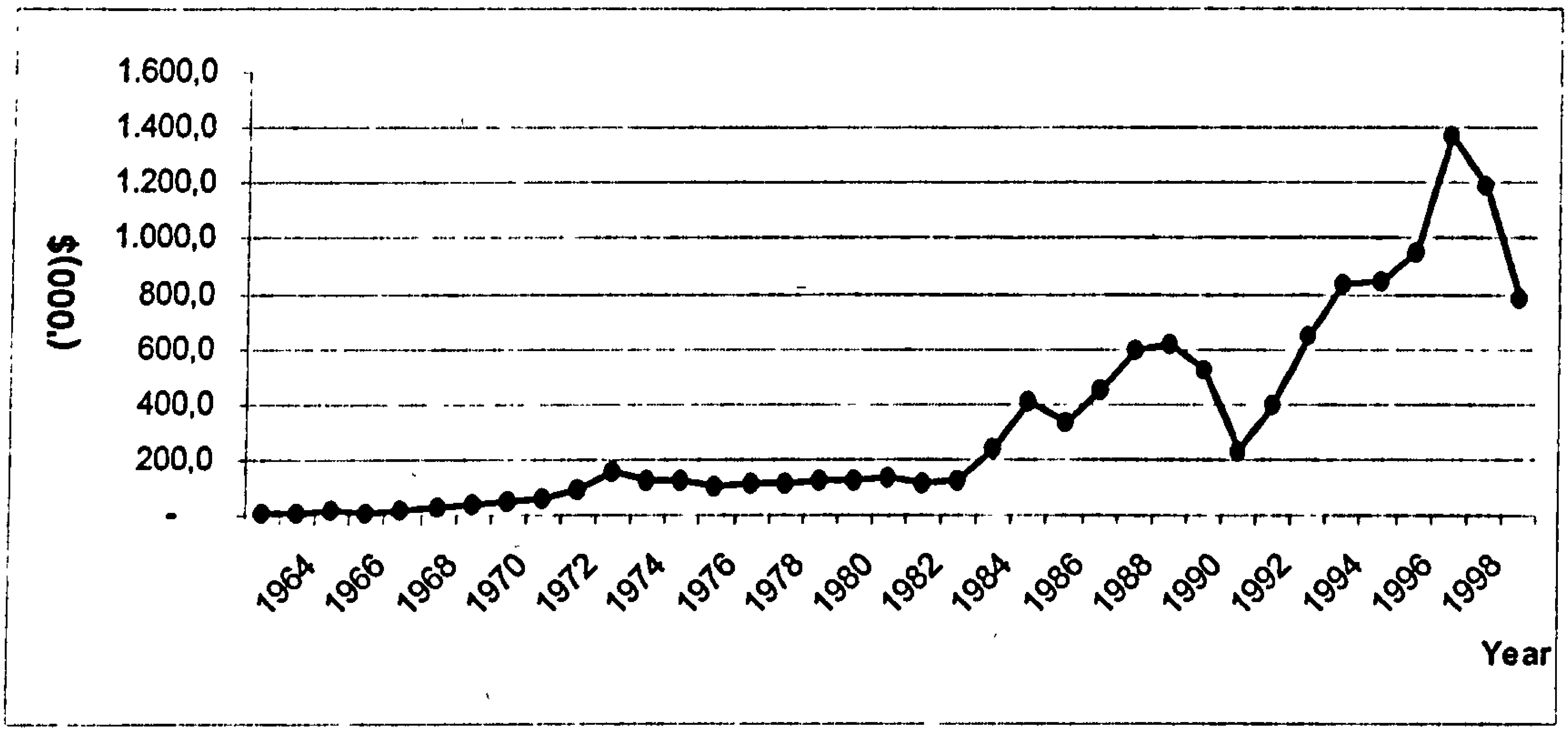
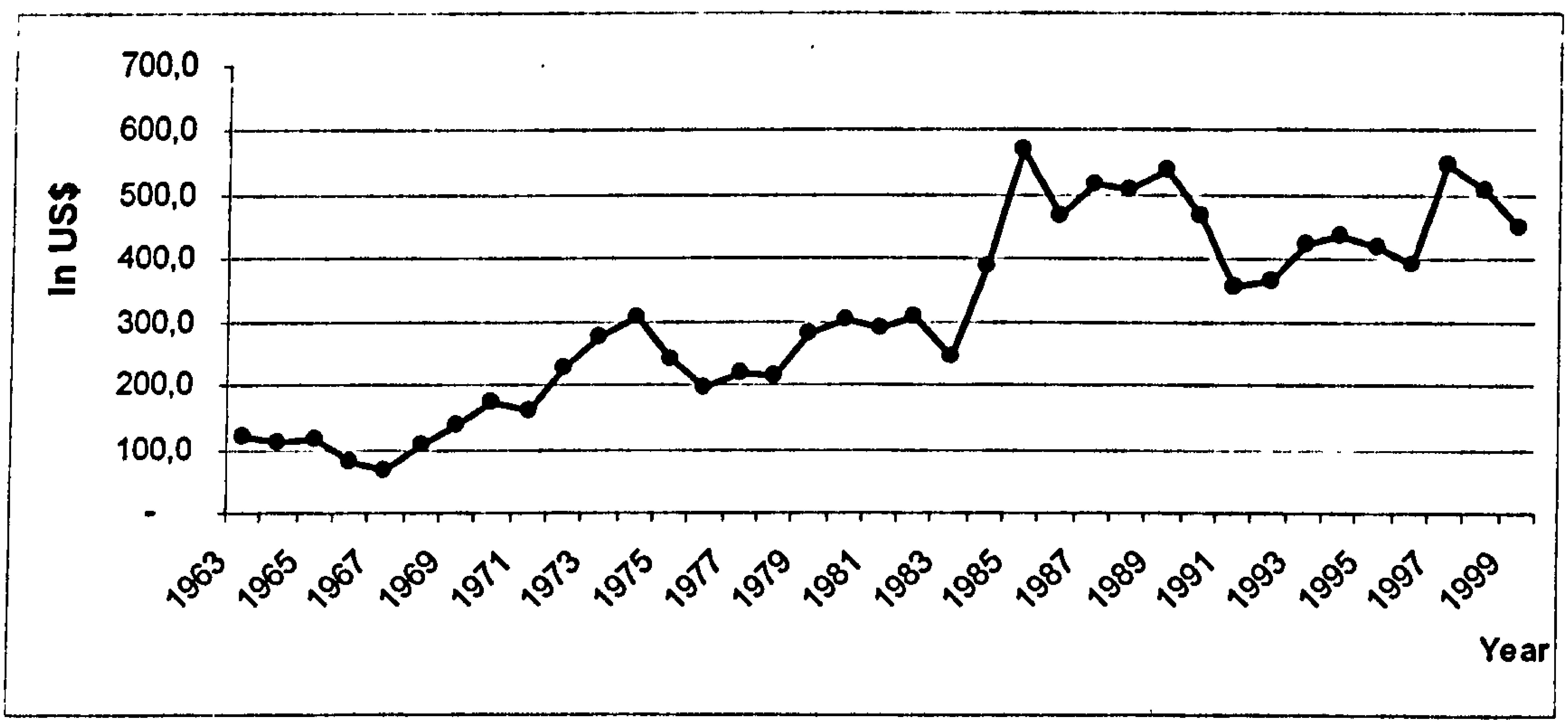


Figure 6.8. Average International Visitor Expenditure in Istanbul Between 1963-2000 (*in Real Prices*)



Secondly, it may be a result of the unsystematic research methods used by the authorities during the early years of the analysis, which were improved following the commitment of the Government to tourism development after the 1980s. In fact, as Seeking (1989) notes, up until 1980, even the statistics on the accommodation use of international visitors were understated, as many hotel operations failed to provide accurate records and listings of their visitors. Therefore, while the statistics on overall visitor numbers were supported with the data gathered at frontiers by the State officials, the expenditure figures relied on estimate figures based on general assumptions. The problem with such an approach was that the data collected at frontiers included not only tourists but also all types of travellers coming into the country. Thus, the numbers of international visitors may have included such travellers whose main purpose of travel was not tourism-oriented. Therefore, the difference in the figures of average visitor expenditure may have been caused by the combination of farfetched international visitor numbers and understated total expenditure figures between 1963-1980.

Finally, the unreliable figures in the early years may be a result of the overall economic system of the country before the 1980s. As stated above, Turkey entered its liberalisation era only in 1980 when Governments stopped regulating and levering currency exchange rates in favour of the national currency, and let the liberal and open economic system determine the real value of the Turkish Lira. Consequently, while the monetarism pursued prior to 1980 had reflected on the tourist product offered and had made it relatively cheap in comparison to Western European destinations, post-1980 data display the effects of the transformation of the economic system with a constant and balanced increase in tourism income. Similarly, an external effect of the economy on tourism income is apparent during the policy applications towards a devaluated national currency in 1986 and 1996, during which the average expenditure figure falls by 18% and 7% respectively despite increasing visitor numbers.

If Figure 6.8 is assessed in light of the life cycle theories (Cooper, 1997), it can be argued that Istanbul moved from *'the involvement stage'* in its life cycle towards *'the development stage'* during the period 1985-1989 when expenditure figures reached their peak levels. In fact, when the characteristics of the development stage, which include attracting tourists from adventurous, individual and wealthy visitor markets and receiving high average visitor expenditures, are taken into consideration, this argument can be further strengthened. Moreover, the previous figures both on international visitor numbers and total visitor expenditures support the fact that the tourist product of Istanbul is yet to reach the consolidation stage in its life cycle, as the growth in both continues, albeit with the interference of external factors.

Unfortunately, the life cycle analysis of Istanbul's tourism product cannot be explored further in light of the historical evolution of visitor nights and domestic tourism statistics, as such data neither go back far enough to provide meaningful assessment, nor are they as detailed as the data on the tourism sector of London. Therefore, by relying on the existing literature on tourism development in Turkey in general and in Istanbul in particular, it can be argued that domestic tourism movements in the country started earlier than the *'boom years'* of international tourism, which coincides with the 1980s (Seekings, 1989; O'Reilly, 1993). While unstable economic and political conditions in the country prevented many citizens from travelling abroad, especially in the 1960s and the 1970s, the trend of building summerhouses and spending holidays by the sea especially gained in importance among the middle-class after the 1980s.

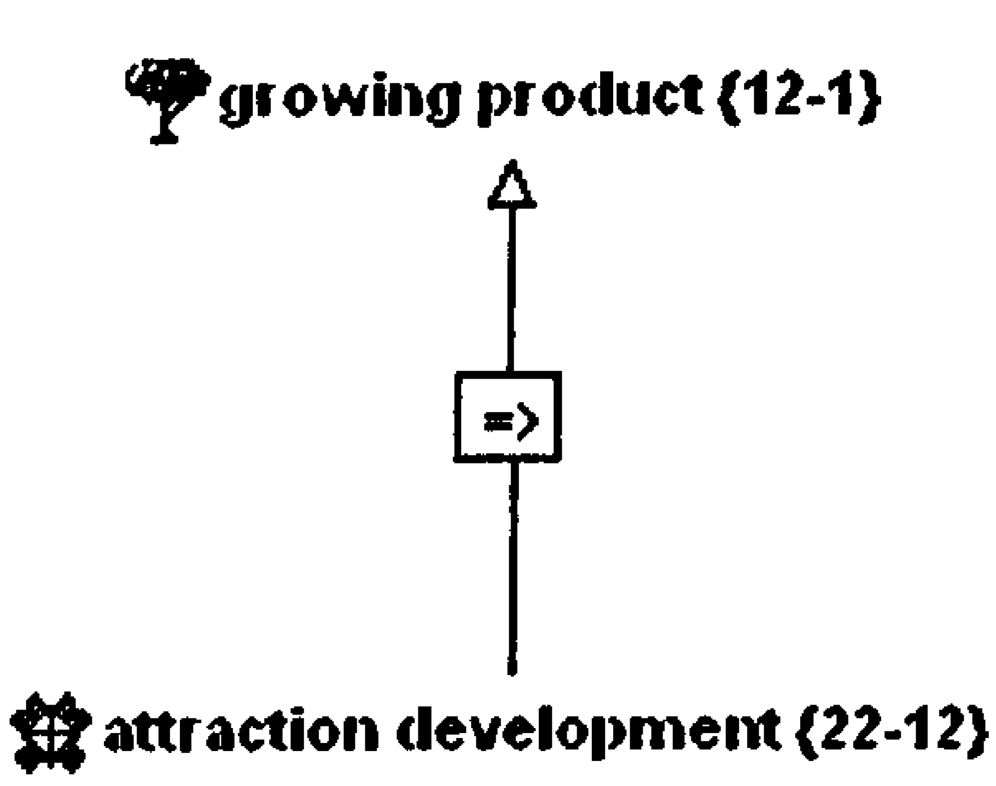
In fact, Istanbul was the leading destination in such a trend, as the elite class of the city was already keen on building villas as second houses along the Bosphorus and on the Princess

Islands by the end of the Ottoman era. While the uncontrollable expansion of the urban core in all directions in the city put an end to the second-home trend along the Bosphorus, the Princess Islands and small villages around the city and along the coasts of Marmara and Black Seas continue to attract domestic and mainly local holiday-takers.

While the second house complexes developed along the west and south coasts of the country may have limited the share of Istanbul in this special market, the importance of the city as a national and international trade and cultural centre with on-going hotel developments still draws an increasing number of domestic visitors from every corner of the country. In other words, although domestic tourism may have entered its development stage in the life cycle process earlier than international tourism in Istanbul, it is not considered to have stopped growing (Seckelmann, 2002).

The interview findings of the research show that the stakeholders of the sector in Istanbul agree that the city as a tourist destination is still in its development stage. As Figure 6.9 shows, while the code *'growing product'* was linked to 12 interview quotations, there were no comments, which would require one to create a code such as *'decreasing visitor numbers'*. This strengthens the argument that Istanbul is not experiencing any other life cycle stage than the development one.

Figure 6.9. Istanbul: A Growing Tourist Destination



The above figure includes the code *'attraction development'*. But in the case of Istanbul, in contrast to the use of the same code in the life cycle analysis of London, the inclusion of the code was to stress the emphasis of interviewees on the need to further develop and improve packaging of tourism services, facilities and amenities. As one interviewee emphasised:

> *"It is difficult to say that Istanbul has achieved prosperous tourism development. It is still developing. It could have been better, if essential urban and tourism infrastructure had been completely accomplished" [Istanbul Interview: 16].*

Other remarks on the varying visitor markets attracted to Istanbul denote that the city is still developing as a tourist destination and is discovering alternative tourism forms to attract numerous segments:

> *"We see that the 'Conference and Exhibition' market is developing steadily in Istanbul. In fact, the operation of many 5 star hotels in the city relies on the number of visitors who are on some type of business trips" [Istanbul Interview: 13].*
>
> *"Istanbul has advantageous components within its package. Istanbul cannot compete in the 'sea-sun-sand' market, which attracts mass tourism. But Istanbul has all sorts of other facilities and amenities to allow it organise tourist events and activities. This includes business, heritage, culture, conference, shopping and sports tourism. However, it is still in its early stages of development... There will always be some visitors drawn to Istanbul by its oriental, yet modern, tourist offer" [Istanbul Interview: 11].*
>
> *"I think that Istanbul can now compete with many other European destinations with its shopping offer. In addition to the historical Grand Bazaar, there are now modern shopping complexes all around the city. I think this market segment and especially its domestic market side, will develop even further" [Istanbul Interview: 14].*

To conclude, when the evolution of international tourism in Istanbul is analysed according to the theories of life cycle analysis, it can be said that the tourism development and the marketing efforts and activities of public organisations both on a national and local scale, have only been in existence over the last 20 years. In fact, as the last quotation stresses, due to the lack of interest shown by Governments and local organisations in developing and marketing the tourism sector strategically, continually and collaboratively, the city has been evolving as a tourist destination spontaneously due to its rich heritage and cultural offers. Such limited and overdue focus on tourism development is directly linked to the status of the city in its life cycle. The graphical patterns in both international visitors and their expenditure figures in the period 1963-2003 also postulate that the city continues to attract an increasing number of visitors despite the interruptions caused by external factors, and it is exhibiting the characteristics of the development stage.

6.2.3. Amsterdam: A Stagnant Product

The analyses of London and Istanbul indicate that the international tourism to the cities concerned, only achieved a remarkable growth rate after the 1960s when the mobility, prosperity and spare time of potential visitors improved with technological developments, stable economic conditions of developed countries, reduced weekly working hours and expanded legal holiday rights. Amsterdam was also influenced by such indicators of mass tourism in these early years and established a clear image as a major European destination with a *'rich heritage and cultural'* tourist offer in its package, especially after the post-war period (Pinder, 1998).

Undoubtedly, Amsterdam has always been a gateway to the Netherlands and attracted visitors either for education, trade or recreation purposes long before the last century. However, as Pinder stresses, while the numbers of visitors and tourism earnings were limited even during the first half of the 20th century, the significance of the sector has been observable in economic terms since the 1950s. In fact, although the Rijksmuseum and Stedlijk Museum, which are the major landmarks of the city today were both established more than one hundred years ago, there were still very few hotel operations in the city centre by the 1950s (Van Schendel, 1989).

There seems to be a consensus in the existing literature that Amsterdam was already established as a well-known tourist destination by the 1960s and experienced an immense growth in international tourism arrivals in the late 1970s and at the beginning of the 1980s (Pinder, 1998; Ashworth and Tunbridge, 2000; Dahles, 1998; Terwindt, 1999). However, a similar consensus is also evident with regards to the decline of the sector since 1985 onwards (Ashworth and Tunbridge, 2000; Fainstein, 1996; Van Limburg, 1997; Jansen-Verbeke and Van de Wiel, 1995; De Vilder, 1990). These authors analyse the tourism sector in Amsterdam from different perspectives and list various reasons for the decline, which mainly revolves around the negative image that the city has gained due to the local authorities' *'tolerant'* approach towards drug use and prostitution within the very heart of the city. Despite the efforts of the local government to limit the use of soft drugs to the registered coffee shops and the promotional campaigns of the Amsterdam Tourist Board (VVV) emphasising the cultural and historic offers of the sector, the city is still very much associated with its image as a sex and drug capital of Europe among potential visitors (Ashworth, White and Winchester, 1988).

It can be argued that *'the involvement stage'* of the city in its tourism life cycle coincides with the post-war period and the 1960s when the city was a fashionable destination especially among young visitors from Europe and North America. The term *'the Mecca for hippies'* is widely used in the literature referring to the popularity of the city among such a distinctive market segment during the 1960s (O'Loughlin, 1992; Dahles 1998; Pinder, 1998; Ashworth and Tunbridge, 2000). There is no doubt that the pulling-in effect that the city had during these early years of tourism development was achieved with its liberal sex and drug policies, which appealed to youth culture and was not greatly opposed by either the local community or the wider communities both on a national and international scale. As it is the very characteristic of the involvement stage (Cooper, 1997), these adventurous, mostly unemployed and backpacker visitors were staying in cheap accommodation and were not spending much during their stay in the city.

The involvement stage of the 1960s was followed by the remarkable growth of international tourism arrivals initially during the 1970s, but more apparently during the beginning of the 1980s. While the tourist offer of Amsterdam was reinforced with an emphasis on its cultural and heritage components, the local and national authorities were directly involved in tourism development plans and marketing activities. Prior to the development stage *-i.e. the 1970s and 80s-*, the sector was taken rather for granted by the local authorities and urban decision-makers and was not even regarded as one of the major economic sectors of Amsterdam. However, soon after the beneficiary effects of the sector, which became more apparent with increasing numbers of visitors, were realised by the authorities, the Ministry for Culture, Recreation and Social Affairs was created to emphasise the importance of tourism as part of economic policy (Beckers, 1995).

As the major spot for international tourism, Amsterdam has been placed at the centre of national tourism plans and strategies. While the initial plans and reports of the Ministry stressed the need for more accommodation, most of the major international hotel chains were present in Amsterdam by the end of the 1980s. As McGuffie (1992) notes, there were already 290 hotel outlets with a capacity of 27,000 beds in the city by 1991. Therefore, visitor arrivals increased remarkably until the mid-1980s in line with the active role played by the public organisations as tourism policy-makers and marketers and, government initiatives provided to private sector organisations. Following the replacement of tourism by other urban-wide issues such as housing and employment in government policies, private sector was encouraged to take active role in tourism development and marketing after the mid-1990s (Beckers, 1995). It is during this decade when visitor arrivals followed a rather balanced growth pattern at an average of over 2 million international visitors a year since 1995.

While Amsterdam has not experienced a distinctive growth in visitor arrivals and overnight stays over the last 14 years, the statistics on the tourism sector do not show any sign of an upward trend (Van Limburg, 1997). In fact, there have been times over the same period of fourteen years, when the city has suffered a decline. This is not to say that tourism management and marketing by private sector organisations were the main reasons for the stagnation of visitor arrivals to Amsterdam in the 1990s. In fact, as noted above, there are various reasons for the early start of what may be called *'the consolidation stage'*. Among these reasons, there are those caused by external factors, which interfered with international visitor arrivals across Europe, such as world-wide economic recession, political conflict between various nations in Europe and the Middle East and, increased competition among European destinations in the international tourism market. However, there are also some destination-based factors, which can be summarised as follows (Dahles, 1998; Burgers, 1995; Ashworth and Tunbridge, 2000; Fainstein, 1996);

a) The well-established image of Amsterdam as a European capital of sex and drugs is also associated with some other unpleasant image components such as an unsafe and dirty destination.
b) There has been a strong argument raised by the local communities of Amsterdam that priority should be given to the needs of residents rather than visitors with regard to the budget allocations of public money. Priority in municipal expenditure was, thus, given to such matters as housing, office development, public transportation, recreational activities for local people, and social security.
c) There has also been a lack of integrated and consistent tourism policy in Amsterdam. The organisations responsible such as the Amsterdam Tourist Board (VVV) and the Municipality of Amsterdam have not been fully committed to reversing the downward growing trend of international tourists.
d) The reason for such neglect is also explained by the efforts of public authorities to keep tourism flows within the limits of the physical capacity of Amsterdam and its tourism sector. It has been argued that Amsterdam, as a small and compact city, should not expand its tourism sector any further, since overcrowded visitor flows may cause severe urban problems for the physical, social and environmental compatibility of the city, hence deteriorating its *'living quality'*.
e) The lack of a major landmark associated with the overall tourist offer of Amsterdam is detrimental to the tourism sector. Amsterdam does not have a historic or contemporary tourist site like Big Ben in London and the Statue of Liberty in New York, which would link the city with its tourist product package in the minds of potential visitors.

In order to mitigate some of these problems and, especially to develop new tourism zones embracing tourist attractions, services, facilities and amenities in clusters, various initiatives have been launched by the local authorities. While the former general post office and the former Stock Exchange were transformed into the Magna Plaza Shopping Centre and the Beurs van Berlage Conference and Exhibition Centre respectively in the 1990s, a more recent development plan along the waterfront of the River IJ is still under construction. The IJ development has the aim of rejuvenating the tourism sector in the city, as new recreation and leisure facilities are being built along the south bank of the river (Ashworth and Tunbridge, 2000). However, it is still too early to draw conclusions on whether the IJ developments will give an impetus to visitor arrivals to Amsterdam, or they will evolve as new residential and recreation districts of the city, used mainly by its inhabitants.

The statistical analysis of Amsterdam's life cycle, which was to be comparable with the analyses of London and Istanbul, could not be carried out in this research due to the incomparability of tourism statistics collected by various organisations in the Netherlands. Statistical information on visitor arrivals, nights spent by visitors, average and total visitor expenditures and the historical evolution of various market segments such as international and domestic tourism, could not be traced back in time to cover long enough periods for meaningful analysis. This is mainly because nation-wide tourism statistics not provide detailed information on the tourism sector of Amsterdam. Instead they cover the city as part of either the Randstad area (Amsterdam, Rotterdam, the Hague and Utrecht), or North Holland, which embraces all sizes of towns and cities in the concerned region together with Amsterdam (Statistics Netherlands, 2000 and CBS, 1998a). Although the influence of Amsterdam as the major gateway destination in both regions is undeniable, it is still difficult to provide an assessment of the city's tourism sector by looking at the evolution of tourism on a regional scale.

Meantime, the leading tourist authority, Amsterdam Tourism Board (VVV), has appointed a private consultancy firm to undertake tourism research and regards the statistical information compiled by such research confidential and for office-use only. In their annual publications of tourism bulletins and reports, the exact figures of visitor arrivals and expenditures are not disclosed, but are presented as percentage changes from year to year.

Given the above difficulties in obtaining statistical information, the table below, which only covers a 20-year period, was compiled mainly from a published research on international tourism in Amsterdam (Van Limburg, 1997) and the publications of the VVV on annual growth rate of international tourism in the city, which has remained stable at 3% between 1996-1999. Although, more recent statistics covering the period 2000-01 are available, their consistency with the previous data is debatable. As Van Limburg adds, the growth of international tourism in Amsterdam between 1982-1993 lagged behind that of the Netherlands as a whole and the share of the city from the overall international visitors to the country fell from 36% in 1983 to 27% in 1993.

When the below figures are displayed as graphs, it becomes clear that the growth patterns of total visitor numbers and nights spent in Amsterdam show a remarkable similarity. Figures 6.10 and 6.12 show that in addition to the decline in both figures in 1991 probably due to the Gulf Crisis, the city suffered from decreasing visitor numbers between 1983-86 and 1991-93. While the international visitor arrivals to the city dropped by 11% in 1986 and 12% in 1993, visitor nights in Amsterdam fell by 25% between 1982-86. Over the 20-year period, both figures grew at an average rate of 3%. The recent upward moving trend in both figures should not be mistaken as a signal of forthcoming growth, as the figures for the last five years are only estimates, and may conceal short-term fluctuations.

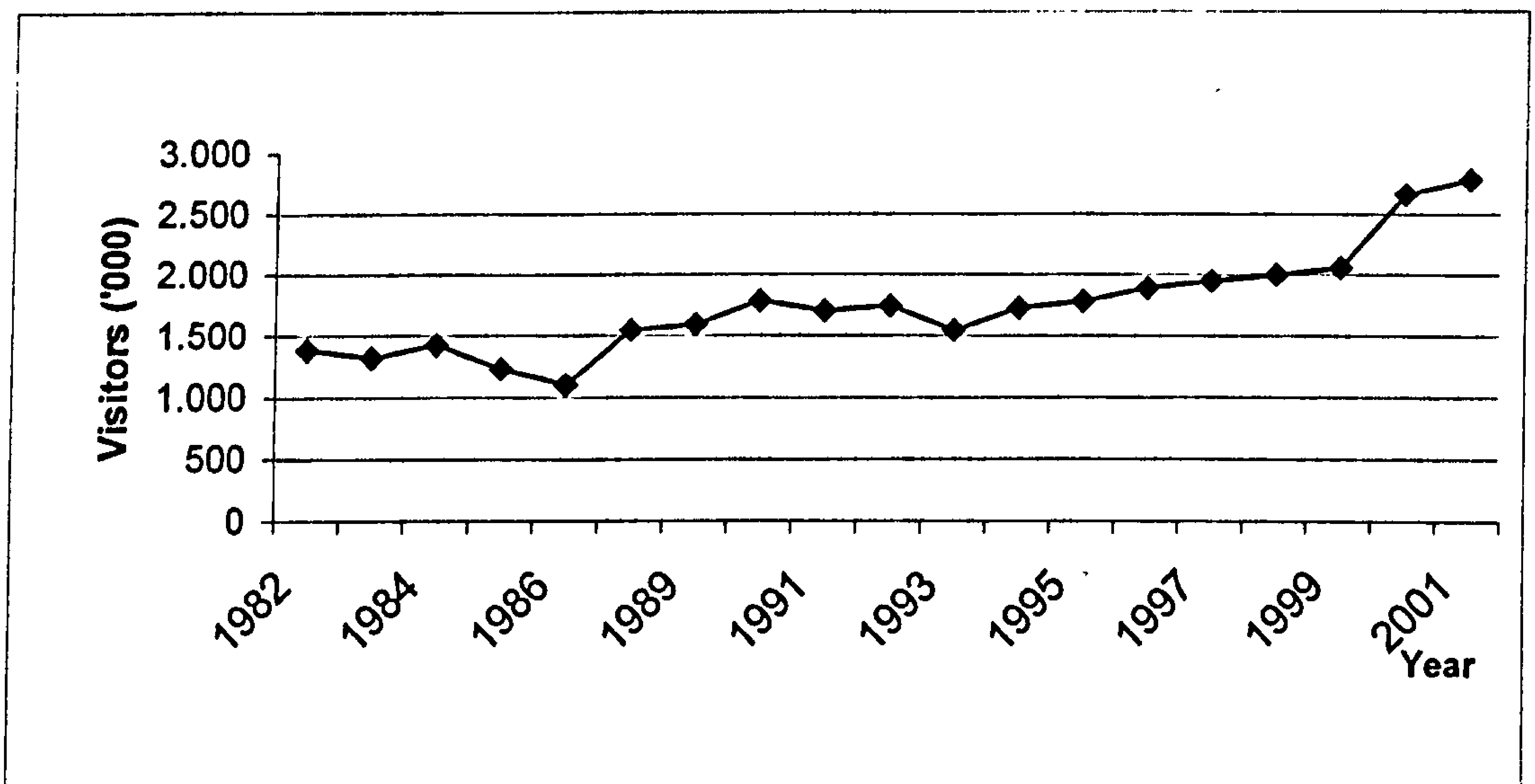
Table 6.6. International Visitors and Nights Spent in Amsterdam Between 1982-2001

Year	International Visitors in Amsterdam ('000)*	International Visitor Nights in Amsterdam ('000)*
1982	1,384	3,050
1983	1,322	2,823
1984	1,426	2,963
1985	1,232	2,481
1986	1,104	2,302
1988	1,545	3,100
1989	1,593	3,355
1990	1,785	3,845
1991	1,707	3,847
1992	1,746	3,790
1993	1,545	3,334
1994	1,732	3,810
1995	1,784	3,925
1996	1,891	4,160
1997	1,948	4,286
1998	2,000	4,400
1999	2,060	4,532
2000	2,664	5,248
2001	2,787	5,583

* The figures between 1996-2000 are estimated according to the 3% average growth rate.

Source: Van Limburg (1997) and VVV (2000a and 2004a).

Figure 6.10. International Visitors to Amsterdam Between 1982-2001



The interview results of this research confirm the stagnant growth of tourism in Amsterdam. As Figure 6.12 displays, the majority of the interviewees referred to decreasing numbers of visitors in the city, while few mentioned that the city continues to attract increasing numbers of visitors. However, it should be noted here that the interviewees, who implied that the tourism sector in

Amsterdam is not in decline, were primarily the representatives of the leading tourism development, planning and marketing authorities. Therefore, their views on the well-being of the sector may be biased and may not be as objective as the other interviewees.

Figure 6.11. International Visitor Nights in Amsterdam Between 1982-2001

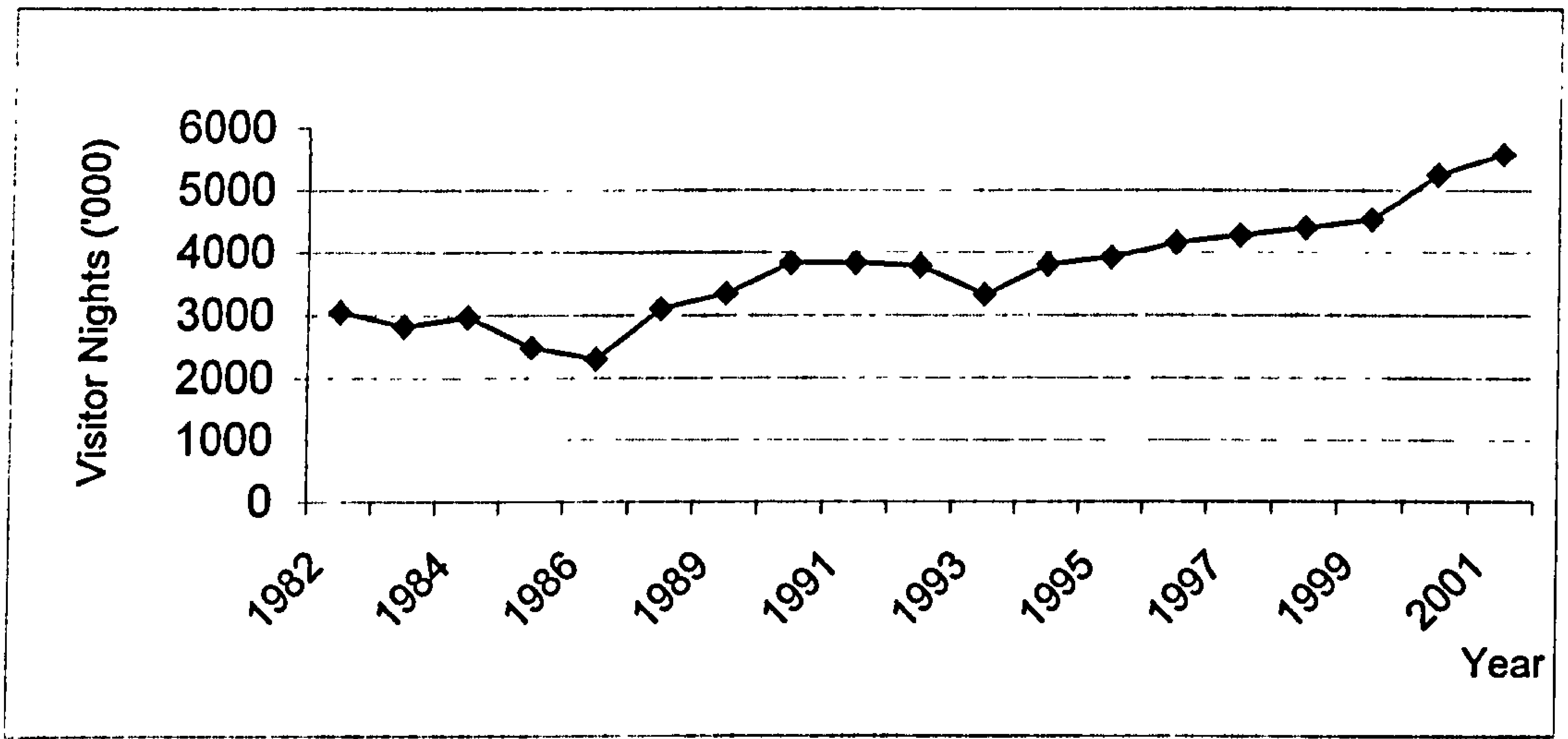
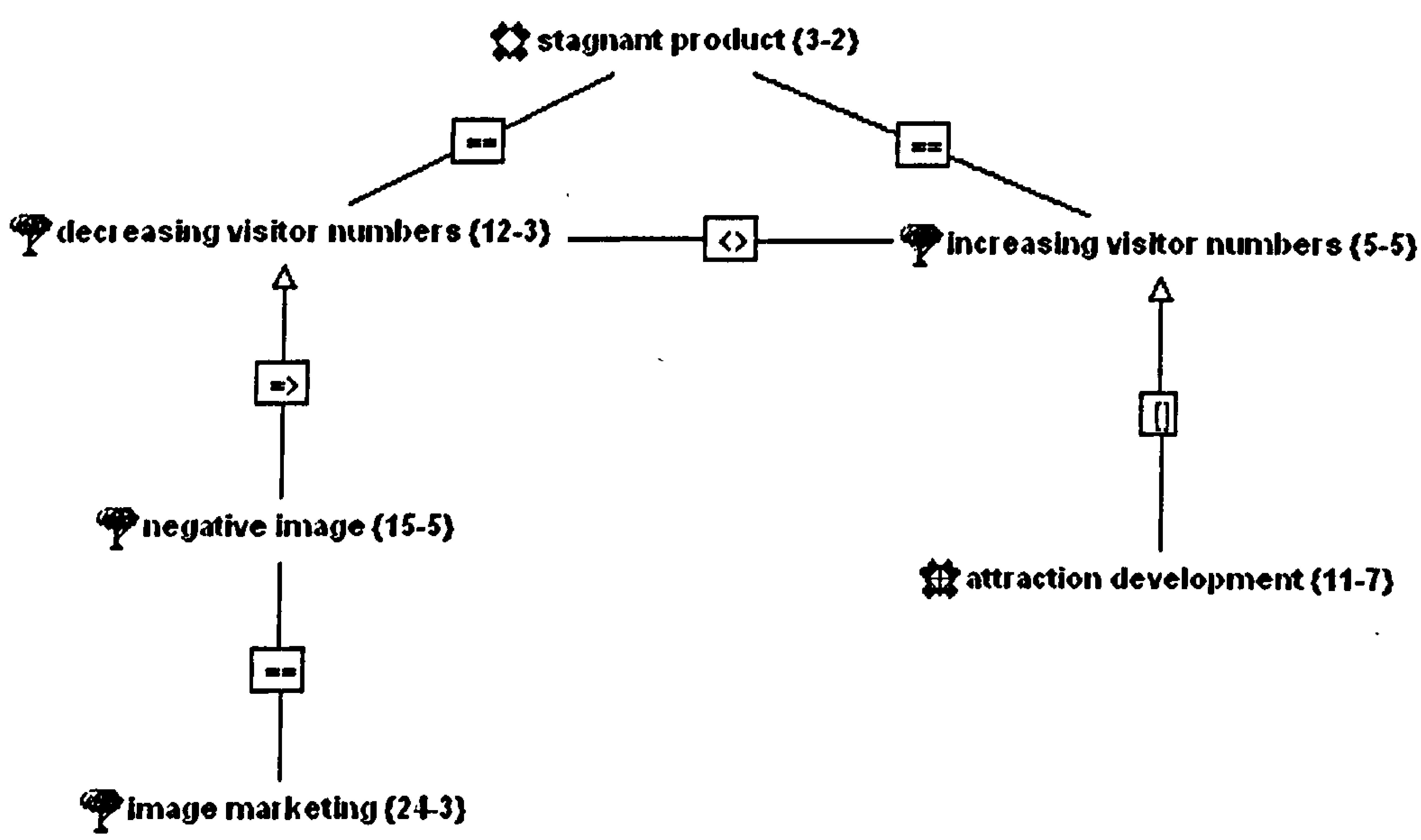


Figure 6.12. Amsterdam: A Stagnant Product



The interviewees who were concerned about decreasing visitor numbers and thought that Amsterdam is in decline, listed various reasons including the negative image of the city and its tolerant approach towards sex and drugs. The lack and inconsistency of strategic plans, fierce competition among European destinations and the lack of government funding for tourism development and promotion were also shown as factors harming the position of Amsterdam as a tourist destination. Some of the quotations from the interviews, which were attached with the codes '*decreasing visitor numbers*' and '*negative image*', are as follows:

> *"For the demand we have, the number of hotels has been satisfactory. Tourist arrivals to Amsterdam may have not been decreasing, but there is not big growth... Unfortunately, Amsterdam has not proved that it will continue to attract more visitors in the future. It has shown stable growth rather than a steep incline" [Amsterdam Interview: 7].*

> *"Amsterdam is being confronted by increasing competition because of the promotion of new destinations such as Prague and Budapest on the one hand and heavy promotional activities of all major European destinations as culture and heritage centres on the other. Amsterdam, meantime, despite its own unique aspects, has lost a remarkable amount of business to its competitors because of its sex and drug image" [Amsterdam Interview: 14].*

> *"Amsterdam has reached the stage of saturation in the existing markets like Europe and the USA. There is an urgent need to move toward other market segments to keep the city attractive to growing markets... Recent surveys show that the city is losing its position in the international market, as there are too many new destinations coming up in Europe" [Amsterdam Interview: 13].*

> *"Amsterdam as an urban tourism product has suffered a lot. It has severe problems. They (the urban-planners, decision-makers and marketers) could not come up with solutions. That's why the tourism industry of Amsterdam has collapsed within the last ten years... During the late 70s, Amsterdam was number 6 among the top European destinations after London, Paris, Rome and Vienna... It was in the league, although it was one of the smallest cities in that league. The following 20 years, it has been overtaken by city after city... Now, Amsterdam should be happy, if it is among the first 20 destinations of Europe" [Amsterdam Interview: 6].*

To conclude, Amsterdam as a tourist destination has shown clear indications of a slowed increase in the total numbers of international visitors partly due to a negative image built over the last 40 years. Clearly, it will take a long time before such an image is transformed into a positive one providing that consistent and strategic development and marketing plans are carried out by urban planners and tourism marketers. It may well be the aspiration of local authorities to keep tourism flows within certain limits and to benefit from the tolerant approach of the city towards sex and drugs as a de-marketing tool to discourage surplus of visitors that the city cannot accommodate due to its limited physical, environmental and social capacities.

However, the current aim of the Amsterdam Tourism Board (VVV, 2000a), which is to attract more high-income-earners, families and long-stay market segments with an emphasis on the cultural and heritage offer in promotional activities, contrasts with such an assumption. Therefore, in order to carry the city from its current consolidation stage in its life cycle which has been occasionally threatened by decline, toward a rejuvenation stage, sector-wide precautions should be taken and future growth trends of the sector on a local, national and international scale should be kept under close scrutiny to adapt the tourism offer to changing needs, expectations and wants of potential visitors.

6.3. SWOT Analysis

In order to sustain the tourism sector, the product offer of a city destination should be put under the microscope for close evaluation of its strengths and weaknesses. After all, strategic marketing and planning put the emphasis on the assets of a destination product, which should ideally meet the expectations of consumers, while weaknesses should be eliminated or improved. There is no doubt that major city destinations such as London, Amsterdam and Istanbul, have established their positions in international markets owing to their unique strengths. However, one should not forget that ignored weaknesses and threats may undermine the future of a destination, while missed opportunities would expose tourism to fierce competition.

For this reason, in this research, a SWOT analysis is applied to the case studies in order to examine their product offers. Undoubtedly, it is difficult to assess every single aspect of an urban tourist destination, as they consist of many sub-products including not only varied types of attractions, but also, what may be called *'substitute services and facilities'* ranging from transportation to security. In this research, the SWOT analysis will refer to the overall product offer the cities, while further assessment of the marketing activities of tourism organisations and strategic actions taken to improve the well-being of the sector, will be provided in detail in the following chapter.

6.3.1. Strengths of the Cities

The strengths of the case studies as tourist destinations are listed in the periodic tourism development and marketing plans of their leading tourism organisations year after year. Besides, the articles, projects and other research papers in the existing literature, which investigate tourism from different perspectives, provide insight into the advantages and disadvantages of the sector in each city (Dincer and Dincer 1999; Guvener, 1997; De Vilder 1999; Jansen-Verbeke, 1994; Bull, 1997; Dahles, 1998). When such marketing plans and articles are compared, it can be seen that there have been only minor changes made to the strengths of the city destinations over the years, while their weaknesses, opportunities and threats are altered according to the changing priorities of urban decision-makers, planners and marketers, mainly shaped by market trends and their competitive positions.

The justification for such fixed strengths may be that there is no need to make any alterations, as they are linked to a positive image in potential markets and continue to draw visitors with their strong pull-in effect. In other words, as a positive image takes a long time to be established, the efforts of tourism organisations to concentrate on same aspects of their tourism offer as its strengths year after year, become perceptible.

Table 6.7. Strengths of London, Amsterdam and Istanbul as Tourist Destinations

London	• A strong positive image as a world city and a leading city destination, • The well-known landmarks like Big Ben, Tower of London, Buckingham Palace and Westminster Abbey, • Numerous market segments attracted by the diversified tourist products, such as heritage, culture, business, conference, sports, shopping, education, VFR and short-break visitors, • It is one of the leading cosmopolitan cities in the world which embraces various ethnic groups among residents, and hosts the head quarters of major international organisations, • In addition to its leading position in the UK, London is considered to be the gateway to Europe together with Paris, especially for the North American market, • Adequate urban and tourism infrastructure, • English as the global language, • High percentage of repeat visitors, • Economic and political stability of the country.
Istanbul	• Its geographical location between Europe and Asia, • As a gateway to Turkey, Istanbul is usually combined with other destinations along the South and West coast of Turkey in packaged tours, • Cheap destination, • Benefits from its image as a both European and Oriental destination, which is illustrated by a combination of mosques and skyscrapers in its skyline in promotional materials, • Variety of historical sites inherited from various civilisations including the Byzantine, Roman and Ottoman Empires such as Hagia Sophia, Topkapi Palace and Blue Mosque, • Turkish hospitality toward foreigners, • Turkish cuisine • Warm climate, • Numerous hotel operations serving both ends of the market, while most of the major international hotel chains have their 5-star hotel branches in the city, • Shopping facilities in complexes ranging from the historical Grand Bazaar to contemporary multi-floor shopping malls.
Amsterdam	• Well-known destination as a heritage, but more importantly, as a culture and arts centre -i.e. the Netherlands is the birth-place of many famous artists such as Van Gogh and Rembrandt-, • The Amsterdam houses and canals as the major landmarks, • Its geographical location makes Amsterdam easily accessible from major tourist generator countries like UK, Germany and France. • Its gateway status to the Netherlands, • Adequate urban and tourism infrastructure, • Its 'open-air-museum' characteristic, which derives from its compactness and makes it easier to explore the city on foot or by bicycle. • The hospitality and friendliness of the locals toward visitors, • English and some other major European languages are widely spoken as second languages by both locals and tourism staff, • A cosmopolitan characteristic which embraces people from different ethnic communities among residents, • Compared to other North European destinations, it is relatively cheap, • Stable economic and political condition of the country.

Table 6.7 sums up the strengths of the case study cities. As the table implies, there is a kind of a checklist of topics to be considered when determining the strong aspects of tourist destinations including: accessibility of a destination; its gateway position to wider geographical areas; the efficiency of both urban and tourism infrastructure; its positive image in potential markets; landmark tourist attractions; community acceptance and attitudes toward tourism and visitors; the variety of accommodation facilities and; the diversity of market segments attracted to the destination. In addition, there are destination-specific characteristics, which make each city *'unique'*, hence strengthening its competitive position in target markets.

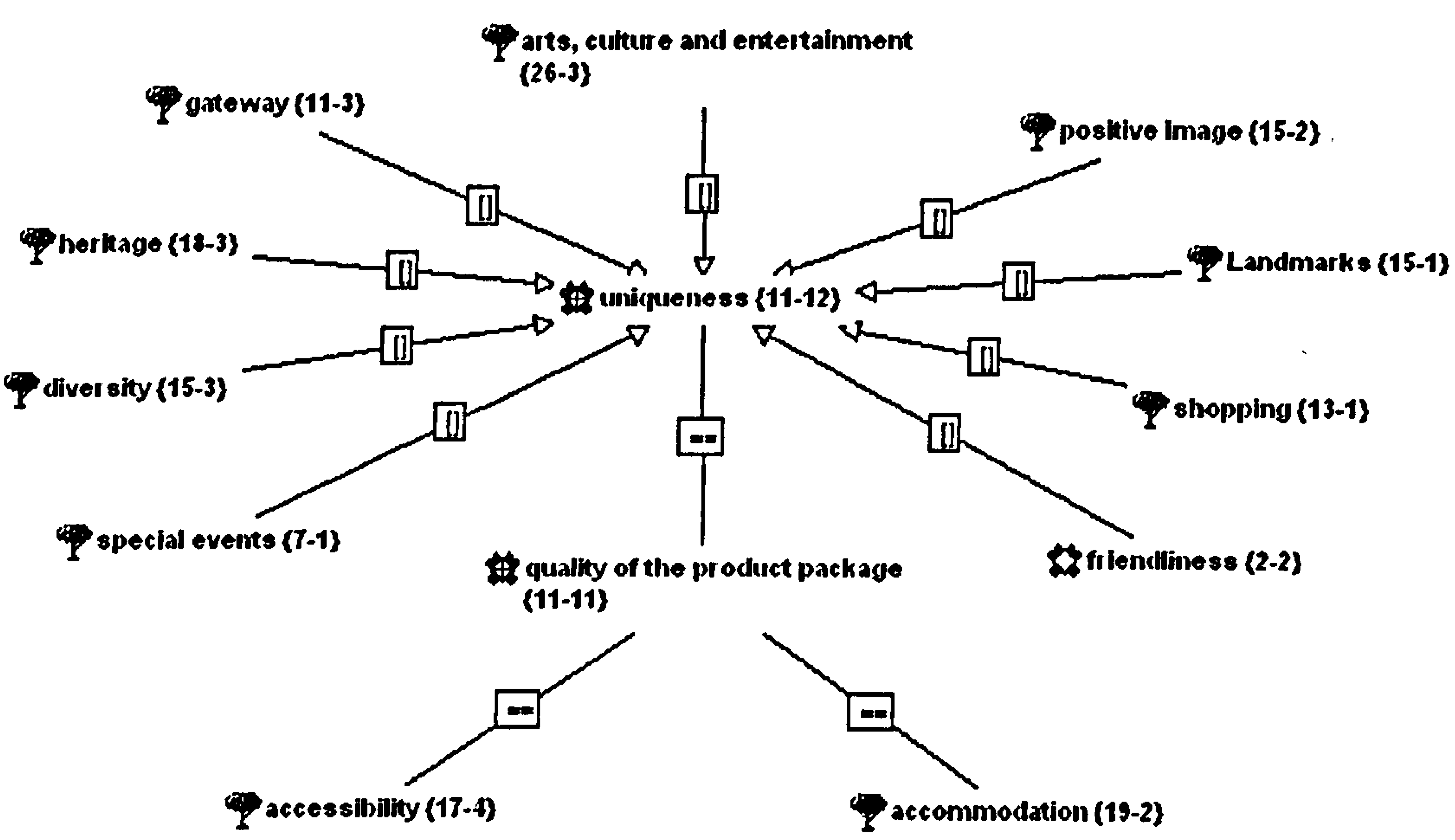
That is why, when analysing the primary data of this research, the emphasis is put on whether the interviewees consider their city as a unique tourist destination, when asked to list its strengths. Figures 6.13, 6.14 and 6.15 display the codes mentioned most by the interviewees as the strong aspects of their city. For the above reason and also for comparison purposes, the code *'uniqueness'* is placed at the centre of each figure, surrounded by others. The common codes, which are mentioned by the interviewees in each city with particular reference to the characteristics of the destination, are kept under the same title throughout the analysis procedure. Therefore, codes like *'gateway'*, *'heritage'*, *'landmark'* and *'friendliness'* can be found in the figures presenting the strengths of all three cities. There are also codes such as *'Turkish cuisine'*, *'tolerance'* and *'diversity'*, which are specific to a particular destination. Still, the dominance of uniform codes is apparent and confirms that urban decision-makers and planners concentrate on similar aspects when referring to the advantages of their city as a tourist destination, albeit with differences in order of importance.

In the case of London, the interviewees made clear remarks about the city as the leading tourist destination in the world with a diverse product range in its offer to attract various potential market segments. As Figure 6.13 shows, the only two codes, which were mentioned as the strengths of London that are missing from the figures of other two cities, are its positive image and the diversity of its tourist products and services. While both Amsterdam and Istanbul were considered to suffer from image problems, the uniqueness of London as a tourist product package was highly associated with its gateway situation, its rich heritage and cultural offer and its world-wide known landmark attractions including Big Ben, the Tower of London and Buckingham Palace.

In fact, among all the codes related to the strong aspects of London as a tourist destination, *'heritage'* and *'arts, culture and entertainment'* were attached to numerous interview quotations, as many of the London interviewees mentioned the historical and cultural attractiveness of the city more than once. One interviewee referred to London as *'the cultural capital of the world'*, while many stressed the importance of various venues and attractions including West End shows, the night life in Soho, museums and arts galleries in different parts of the city and regular exhibitions and festivals as the distinctive characteristics of the sector. The following comment made by a London interviewee summarises the overall remarks on the advantages of the city agreed by the majority of the interviewees:

> *'London as a tourist destination is fascinating. It is a dream. There is something for everyone. It has a very strong package. It is really a combination of factors. It is a meeting point with the best international air access to any city in the world. People come here for conferences, business, shopping, historical sites and so on. There are even visitors coming to London just to have dinner in a famous restaurant or to attend a fashion show... It has a strong profile world-wide, because of its history and culture, but also because of its political importance on the world stage" [London Interview: 9].*

Figure 6.13. Strengths of London as a Tourist Destination

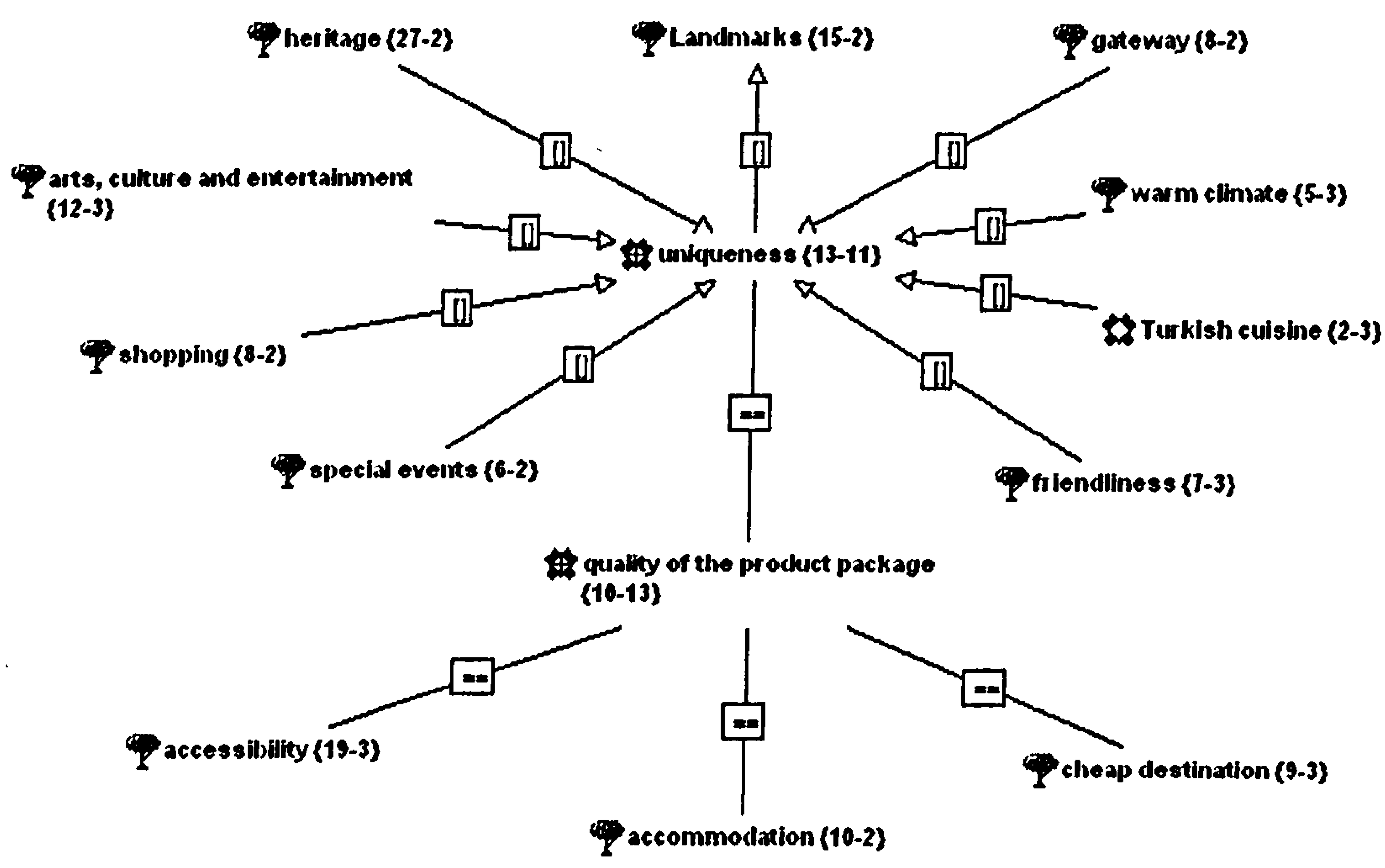


In the figure, the codes *'accessibility'* and *'accommodation'* are connected with the overall quality of the tourist services and facilities offered in the city. The interviewees referred to the *'gateway'* situation of the city to the UK, which is strengthened by its accessibility. However, not all quotations regarding the accommodation sector in London were favourable, as they included criticism of both the inadequate number of hotel outlets serving both ends of the market and, the quality of services at budget hotels. The overall quality of the product package provided by the tourism sector in London, meantime, was mostly found to be above acceptable. One of the interviewees made the following statement concerning the quality of tourist services and products in the city:

> *"Our recent survey showed that we recorded a very high level of visitor satisfaction in London. Visitors are satisfied with the character and general atmosphere of the city, its attractions and river walk, sign posting and cleanliness. Still, the weakest points include insufficient public toilets and a lack of tourist information centres outside the city centre"[London Interview: 16].*

In comparison to the other case study cities, the only aspect, which was mentioned less by the London interviewees, was the attitudes and behaviour of locals toward visitors. The code *'friendliness'*, which was linked to quotations referring to Turkish hospitality in Istanbul and to *'tolerance'* in Amsterdam, was mentioned only twice by the London interviewees. Although this is not to say that there is community resentment of and opposition toward visitors and tourism, it is clear that the stakeholders of the sector do not consider the British hospitality and friendliness toward visitors as a major strength of London.

Figure 6.14. Strengths of Istanbul as a Tourist Destination



Similarly, the codes *'heritage'* and *'arts, culture and entertainment'* were frequently referred to as the strengths of Istanbul by the interviewees (*see Figure 6.14*). However, recurrences of these two particular codes were in reverse order compared to the interview results of London and Amsterdam. Heritage sites and historic buildings including the landmark attractions such as the Dolmabahce and Topkapi Palaces, Grand Bazaar, Hagia Sophia and Blue Mosque show a clear dominance over other codes -*i.e. 27 and 15 quotations are attached to the codes 'heritage' and 'landmarks' respectively*-, which were considered to strengthen the tourist product of the city and its *'uniqueness'* as a tourist destination.

In fact, the interview quotations embracing the term *'uniqueness'* (or its variations), outnumbered the amount of similar quotations from the London and Amsterdam interviews, with references not only to the historic sites inherited from three different civilisations, but also to the distinctive geographical location of Istanbul between Europe and Asia. Such a characteristic of the city was often linked to its *'gateway'* status to Turkey and to the *'accessibility'* of the city from various market segments ranging from Europe to the Middle East. The following quotation shows how an interviewee pinpoints the benefits that Istanbul gains from its location as a tourist destination:

> *"Istanbul is in a superb location. It is the only city in the world, which is founded on two continents. If you place Istanbul at the centre of a 2.5 hour-long flight radius, you would end up with 23 different countries and 74 cities within that easily accessible market circle. This enables us to reach major market generators ranging from Germany to Italy and, from Commonwealth States to Israel" [Istanbul Interview: 1].*

The other distinctive advantages of Istanbul as mentioned by the interviewees include: the Turkish cuisine; the pleasant Mediterranean climate all year round; Turkish hospitality and the friendly approach of locals toward visitors and; relatively cheaper tourist products and services compared to many European destinations. The following quotation covers many of these advantages mentioned frequently by the interviewees:

> *"Istanbul benefits from its warm climate in attracting visitors all year round. Accessibility of the city by air is cheap and efficient... When Europeans come to Turkey, they discover a different and mystic city. There is a different culture, a different way of life and a different religion here... Besides, we do not only offer heritage in Istanbul... They can take part in nature walks, religious tours, sea-sun-sand holidays and so on... Istanbul is a chaotic place to live in. But, for visitors who come here for a few days, such a chaotic way of life can be an attraction" [Istanbul Interview: 2].*

Together with its cheap destination characteristic, the accessibility of Istanbul and its accommodation outlets were also considered to be in appropriate numbers. Considering that the city is still in the stage of development and receives far fewer visitors than London, the number of interview quotations linked to the code *'quality of the product package'* is relatively higher than the results of other two cities.

Compared to 11 and 8 quotations in London and Amsterdam respectively, the Istanbul interviewees stressed the importance of high-quality tourist products with 11 quotations. However, it is important to note that not all interview quotations attached to the above code were about achieved quality standards by tourist organisations and service providers, but were providing suggestions as to how and why the quality of products should be improved to strengthen the competitiveness of the city. Many interviewees mentioned that despite the fact that individual tourism organisations such as 5 star hotels, conference centres and shopping malls have achieved acceptable quality levels in their offers, they found many other service providers failing to reach similar standards.

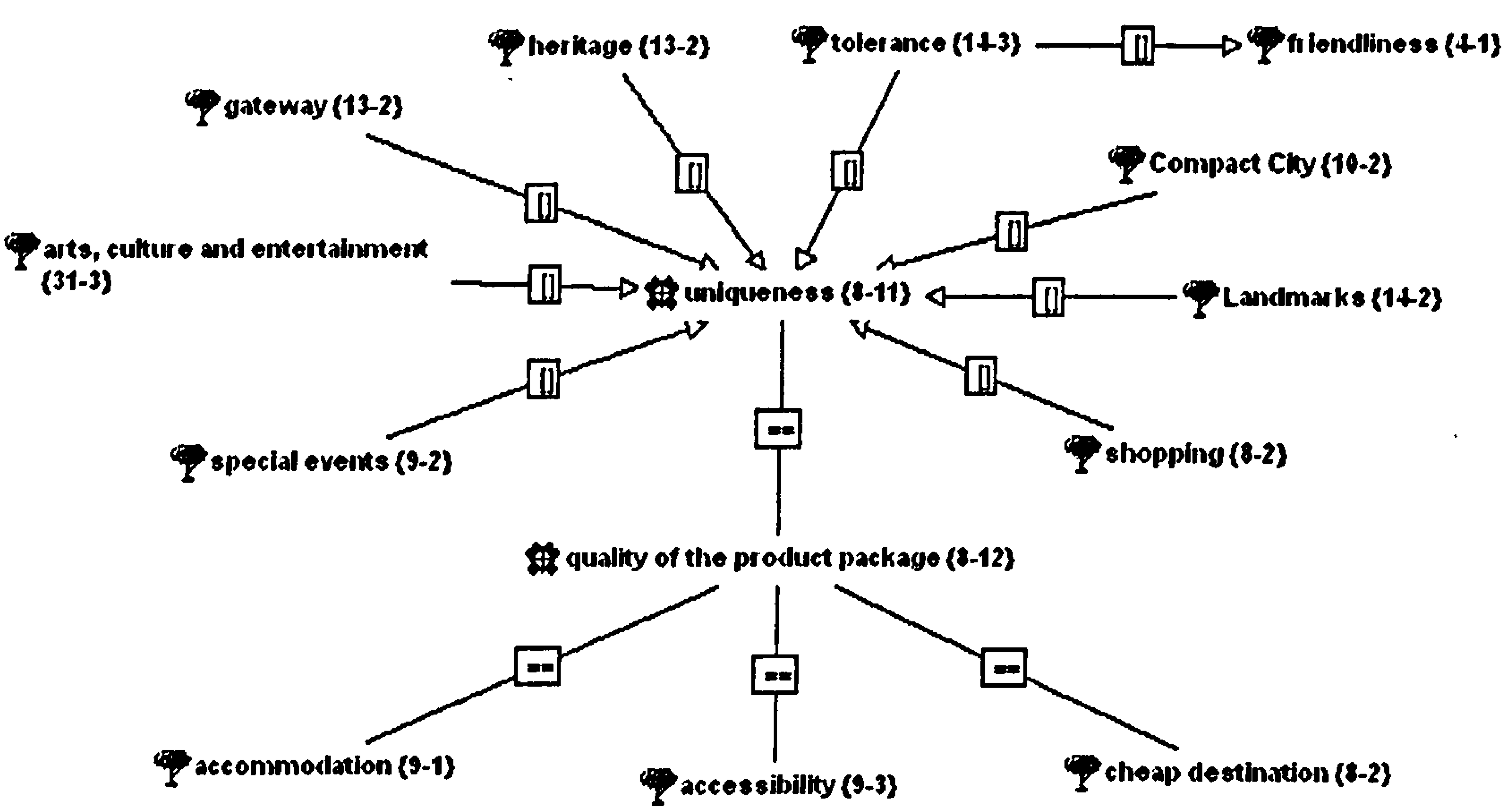
In many cases, local authorities were blamed for the lack of quality in the provision of major urban infrastructure services, which clearly restricts the tourism sector in the city as well as the living quality of residents. However, the high awareness shown of the importance of service quality by the interviewees who are the major decision-makers and stakeholders of the tourism sector, was found to be advantageous for the hope of inclusion of quality-related issues as quintessential components in future tourism development plans and strategies. The following quotation by an interviewee summarises some of these issues:

> *"As an urban area, Istanbul has major infrastructure problems ranging from traffic to water supply. The tourism industry is clearly threatened by such urban problems. But there are also industry-based problems. For instance, some 5-star hotel establishments, which were built with government initiatives several years ago, now offer the standards of a two-star hotel. When there was a decrease in visitor numbers, they lowered their prices and eliminated the provision of some crucial services. Ill-managed organisations are the main sources of such poor services and products. This situation can only be improved by educating people... Only then will service quality be raised" [Istanbul Interview: 9].*

When asked about the strengths of Amsterdam as a tourist destination, the main emphasis was on the rich cultural activities, museums, art performances and galleries of the city. The city, which is the homeland for famous painters such as Van Gogh and Rembrandt, is thought to benefit from its wide range of museums, galleries and exhibition halls in its product package. In fact, among all the codes concerning the strong aspects of the three cities, the code *'arts, culture and entertainment'* stands out with 31 quotations attached to it during the analysis of the Amsterdam interviews (*see Figure 6.15*). Many of the interviewees repeatedly indicated that the vibrant and lively atmosphere of the city is enhanced by its culture, arts and entertainment offers.

The codes *'gateway'* and *'heritage'* were also among the most mentioned components of Amsterdam's strengths with 13 quotations for each. However, the term *'uniqueness'* was not used by the interviewees as often as their London and Istanbul counterparts. In comparison to 11 and 13 quotations attached to the code *'uniqueness'* in London and Istanbul respectively, there were only 8 quotations attached to the same code in Amsterdam. This code is only used when the interviewees made clear remarks about the characteristics of the destinations, which made them different from their rivals.

Figure 6.15. Strengths of Amsterdam as a Tourist Destination



Still, there were notable characteristics of Amsterdam, which could not be found in the other two cities. As often mentioned in the promotional material published by the local authorities and urban marketers, the tolerance of the city and its compactness as an urban area were mentioned constantly by interviewees and required the creation of the codes *'tolerance'* and *'Compact City'*. While the tolerant approach of both public authorities and residents was considered to make visitors from all sorts of backgrounds feel welcome, the compact characteristic of Amsterdam was argued to enrich the tourism offer to the extent that it can be presented as an open-air museum. The following quotation stresses these characteristics:

> *"The unique and strong aspects of Amsterdam are numerous; its tolerance, its open atmosphere, its history and various cultural activities that you can take part in. It is the capital and major tourist destination of the Netherlands... It is a very small city. You can walk everywhere. People are friendly. If you have a problem, you can stop anybody in the street, and they would talk to you in your own language" [Amsterdam Interview: 13].*

In comparison to the other case study cities, the code *'special events'* was used more *-i.e. compared to 9 quotations in Amsterdam, the same code has only 7 quotations in London and 6 in Istanbul-*. In a city where there are festivals, parades, major arts shows and sports competitions almost every month, the reason why the Amsterdam interviewees referred to such events as a strong point becomes obvious (*see Appendix 13 for the list of annual events held in Amsterdam*). Among the exceptional landmarks of the city, meantime, the Amsterdam houses and canals were brought up frequently by the interviewees. The following quotation provides further insight into what sector stakeholders considered as the strengths of their city:

> *"In terms of culture, heritage and business visitors, Amsterdam is the most favourable destination in the Netherlands. It competes well in the international arena too... In its museums, you can see the paintings of the most famous artists in history... Some people may think that having a red light district is a disadvantage. But it is one of the first places that foreign visitors go upon their arrival in Amsterdam. I think the canals, coffee shops, museums, pubs, discos and parks all contribute to the attractiveness of the city" [Amsterdam Interview: 2].*

Another two advantages of Amsterdam were considered to be the adequate number of relatively cheap accommodation establishments compared to North European destinations like London, Copenhagen and Brussels and, its accessibility enriched by the Schiphol Airport. The Amsterdam interviewees were also confident about the quality of the overall product package. As it will be argued in the following chapters, compared to other case study cities, the interviewees were convinced of high service quality provided by tourism organisations. They often mentioned the competent language skills of both locals and tourism employees and their high educational level as supportive constituents enriching overall quality standards.

To conclude, in this research, the SWOT analysis is used to assess the aspects of the cities, which were considered as advantageous components of their tourist product package. The purpose of the analysis was not to investigate how the interviewees would comment on the strong aspects identified by the leading tourist authorities of Amsterdam, Istanbul and London. Still, there is a clear overlap between the factors mentioned as the strengths of the cities by the interviewees and the existing SWOT analyses carried out by the tourism organisations and academics. In the light of this information, *'heritage'*, *'gateway'*, *'arts, culture and entertainment'*, *'landmarks'*, *'shopping'*, *'friendliness'*, *'special events'*, *'accommodation'*, *'accessibility'* and *'cheapness'* were all mentioned by the interviewees and formed the uniform strength elements around the code *'uniqueness'* in each city. In addition, the codes like *'warm climate'* and *'cuisine'* in Istanbul and *'tolerance'* and *'compactness'* in Amsterdam were also frequently referred to as distinctive characteristic of the cities.

6.3.2. Weaknesses of the Case Study Cities

As mentioned in Chapter 2, urban areas suffer from uniform dilemmas, ranging from traffic congestion to inadequate infrastructure. Tourism, which is used as a catalyst tool in many regeneration projects, helps to mitigate some of these urban problems. Nevertheless, the sector is also influenced by the overall economic well-being of an urban area, its social, political and natural environment and problems caused by ill-management and planning. As suggested earlier, the remedy of such problems hinges upon collaborative and interrelated management and planning of various activities, facilities and industries existing within an urban network.

When an investigation is carried out into the weak aspects of the tourism sector in city destinations, some of these uniform urban dilemmas are likely to be seen as components deterring visitors. On the other hand, potential visitors with a keen interest in city destinations, are assumed to be aware of such common urban issues as crowded streets prior to their travel. For a visitor whose permanent residence is in a rural area, such a hectic life can even be an attraction on its own. Therefore, it is difficult to identify when such urban issues become troublesome for the tourism sector in particular and for the urban network as a whole.

Table 6.8 summarises some of the disadvantages of the case study cities, which are gathered from annual publications of local authorities and major tourism organisations, research projects and articles of academics working in the field and, SWOT analyses of the leading tourism organisations in each city. One should not forget that the table below was prepared with special attention to the weaknesses of each city with regard to their tourism sector and their status as tourist destinations.

As the table illustrates, *'traffic congestion'* and *'crowding'* are two of the major urban dilemmas affecting each of the case study cities negatively. Traffic, parking and densely populated central areas were also repeatedly referred to as disadvantages by the interviewees (*see Figures 6.16, 6.17 and 6.18*). Istanbul, with 16 quotations on *'traffic congestion'*, is followed by 13 quotations in London and 9 in Amsterdam. As discussed in Chapter 4, the reason for a higher recurrence of the code in Istanbul is partly because of the originally narrow built streets and roads especially on the Historic Peninsula and around Beyoglu and Galata. Besides, as a chaotic metropolis of a developing country, Istanbul also suffers from limited and ineffective efforts of local and national authorities to upgrade and build infrastructure facilities.

In a city where inward migration and squatter settlements are yet to slow down, the provision of infrastructure services at an adequate level seems to be difficult to achieve in the short-term. In addition to the large sums of public money required in order to upgrade urban and tourism infrastructure, the uncoordinated approach of various public authorities toward problem solving consolidates problems. This is why the codes *'lack of sufficient urban infrastructure'* with 16 quotations and *'crowding'* with 3 quotations were linked to *'traffic congestion'* in the above figure. The relationship between these three codes points to a vicious circle: crowding and increasing population mean infrastructure facilities lag behind appropriate levels and, lack of infrastructure and crowding add to traffic congestion.

Table 6.8. Weaknesses of London, Amsterdam and Istanbul as Tourist Destinations

London	• Some negative aspects or perceptions of London in some overseas markets including the image as an old-fashioned and gloomy destination with bad weather and bad food. • Variable quality of the product, • Centrally concentrated tourism activities and services, • Confusing grading scheme of accommodation operations, • Traffic congestion in inner-city, • Fragmentation of the sector structure with many organisations involved in the planning and development matters.
Istanbul	• Lack of adequate urban and tourism infra- and supra-structure, • Negative image as an unsafe and dirty destination, • Traffic congestion within the city centre, • Lack of qualified staff, • Inefficient public transportation within the city, • Inflexible bureaucracy interfering with decision-making process on various urban-related matters and, • Fragmentation and complex hierarchy of authorities on both local and national scales.
Amsterdam	• Negative image deriving from criminality, drugs and sex image, • Increasing traffic congestion, • Public transportation within the city centre is not clear for visitors, • Tourism concentrated in the centre, • Relatively less famous landmark attractions, • Seasonality, • No high-quality shopping opportunities, • Lack of collaboration within the tourist sector.

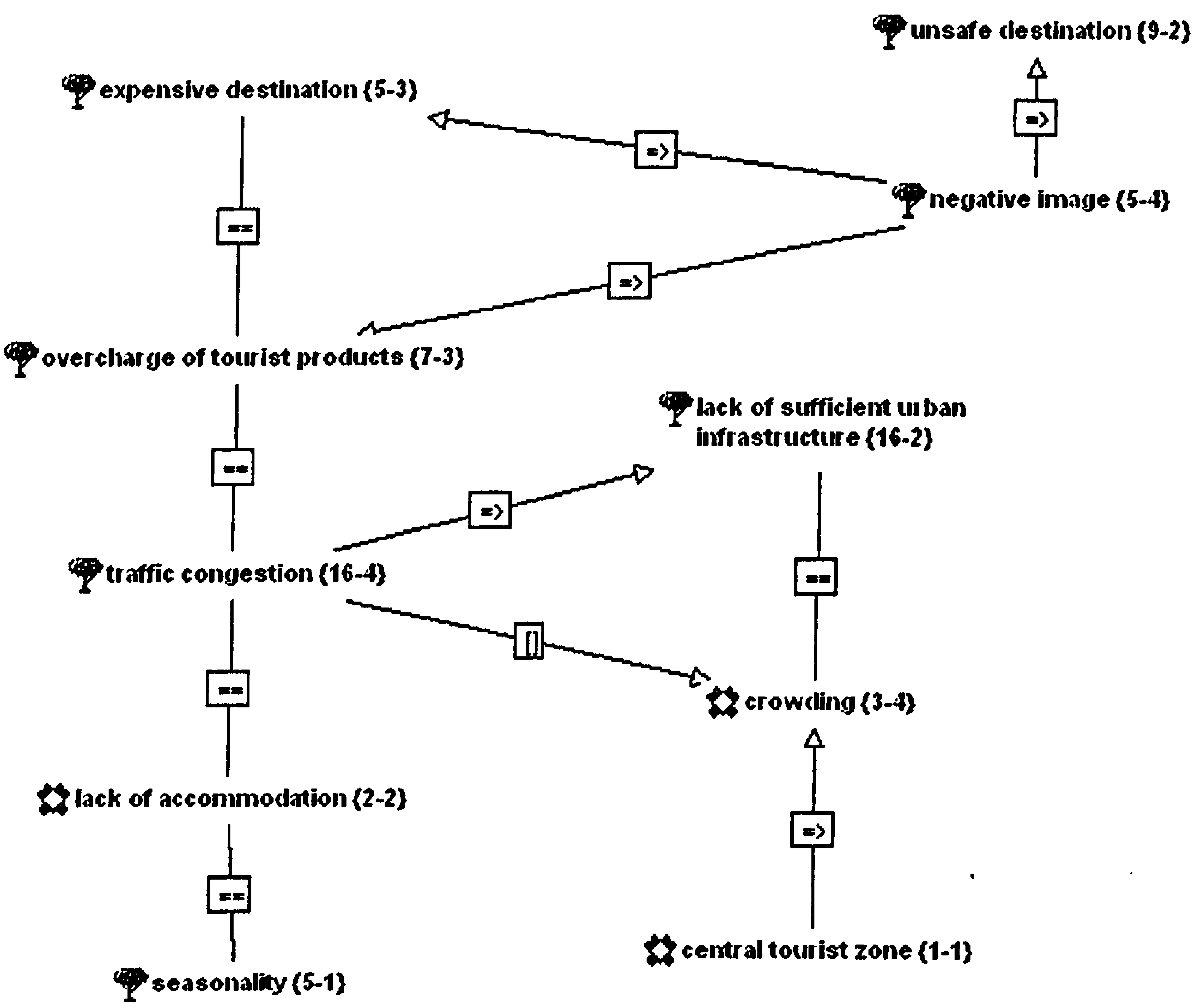
Although such problems are hardly caused by tourism, effective running of the sector is clearly threatened by them. As well as ongoing transportation difficulties for visitors, the assumption that Istanbul is a chaotic metropolis, may be further enhanced by such difficulties and may become another contributory factor to its negative image. Moreover, the public transportation services provided by the Municipality are rather confusing and are not user-friendly for visitors. Although there are numerous bus and boat shuttle services between various districts of the city on both shores, they are mainly used by the residents. International visitors are not provided with appropriate information on these services upon their arrival to the city.

One of the interviewees explained the effects of traffic congestion on tourism as follows:

> *"Traffic starts to be a problem right at the airport where you welcome visitors. Tour coaches get into the city centre in hours. There are no parking spaces for them near major attractions. Because the attractions are scattered across the city, it takes a long time to take groups from one end of the city to another... It may take several hours just to cross the Bogazici Bridge at a rush*

hour. It is no different, if you decide to travel by a commercial taxi. Sometimes you can reach your destination quicker by walking than in a taxi. There is an urgent need to make radical changes... The underground network needs to be expanded and discussions on building a third bridge over the Bosphorus should be acted on as soon as possible" [Istanbul Interview: 6].

Figure 6.16. Weaknesses of Istanbul as a Tourist Destination



Luckily, the major tourist attractions are scattered across the city, eliminating problems that an overflow of visitors in a central tourist zone might have caused. In comparison to 18 quotations in London and 11 quotations in Amsterdam, the code *'central tourist zone'* was only attached to a single quotation in Istanbul. Although the Historic Peninsula is the leading tourist area in the city, the major attractions on the Peninsula like the Blue Mosque, the Imperial Museum, Hagia Sophia, Yerabatan Cistern and Topkapi Palace are located in a pedestrianised area, which allows visitors to move between attractions free of traffic.

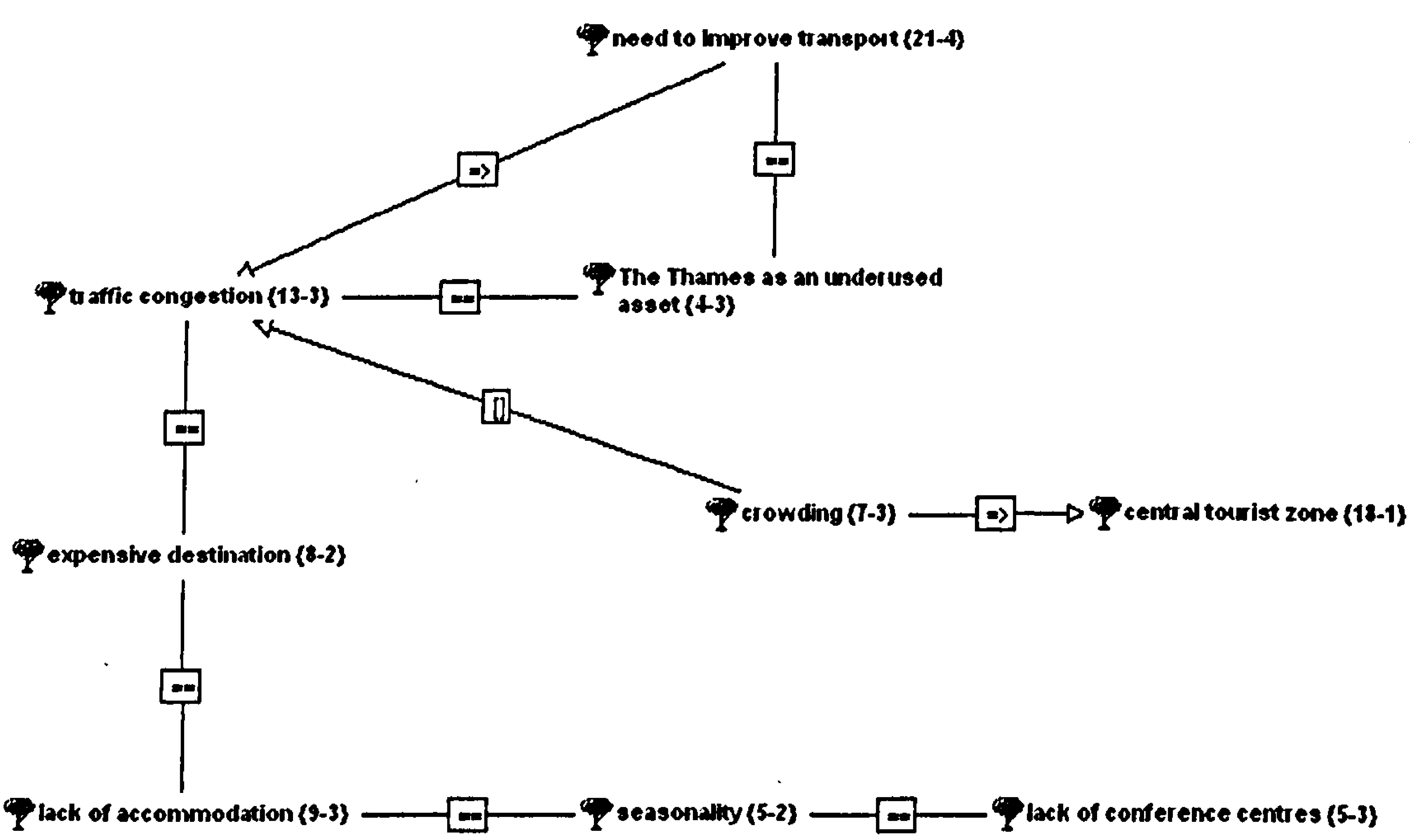
Unlike the Istanbul interviewees, the number of quotations attached to the code *'central tourist zone'* shows how concerned the London interviewees were about the matter. The large number of visitors in Westminster, Kensington and some parts of Camden was mentioned 18 times by the interviewees as a disadvantage. Several suggestions and comments were made as to how to decentralise tourism flows in the city and how efficient the current regeneration projects are in the areas like Greenwich, East London and South Bank. As one of the interviewees emphasised;

> *"Tourism occurs within the area of the Circle Line where all the attractions are and where 80-90% hotel establishments are too. Nothing much happens outside of that. One of the problems for outer-London is simply to get people move out of the West End and into an unknown. People have heard of London. It is not difficult to get people to come to London. But what most people come to see is Buckingham Palace, Oxford Street, Leicester Square and Big Ben... It is much more difficult to get them to come to places like East London, Hampstead or Richmond" [London Interview: 1].*

As the below figure shows, the code *'crowding'* was linked to more quotations in London (7) than in Istanbul (3) and Amsterdam (1). The interviewees have shown the reasons for crowding as the popularity of London among various market segments and the evident concentration of visitors in Central London. As one quotation stresses;

> *"You need to be very careful with new tourism developments. Obviously, you would not want more hotels in Central London. It is already overcrowded. More visitors in such areas would mean more traffic, more coaches and more spaces for parking which all have a negative impact on the industry" [London Interview: 14].*

Figure 6.17. Weaknesses of London as a Tourist Destination



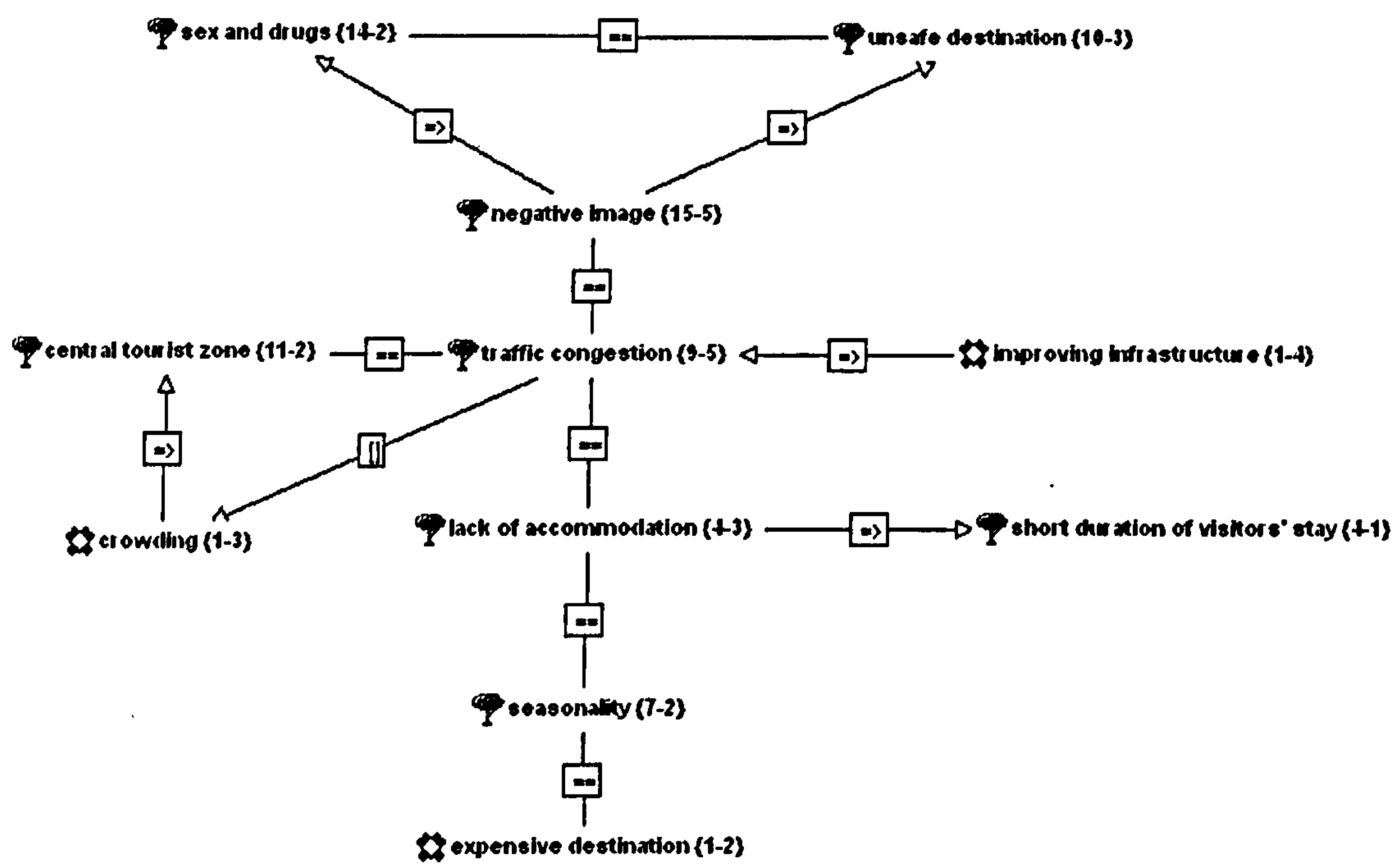
All London interviewees made it clear that traffic and transportation within the city are its leading weaknesses. While 5 of the interviewees said that it is a London-wide issue and cannot possibly be looked at just from a tourism point of view, many concerns were raised with regard to public transportation modes such as underground and bus services. Parking in central London was regarded as an urban-wide problem. The River Thames and its unused capacity as a transportation mode were also referred to as a disadvantage of London. Four interviewees stressed the need to further upgrade pier facilities and the services provided by boat companies in order to permit reliable and consistent boat services.

In contrast to Istanbul and London, traffic congestion and ineffective inner city transportation were not placed at top of the weaknesses list in Amsterdam. Although the codes *'traffic congestion'* and *'central tourist zone'* were attached to 9 and 11 quotations respectively, priority was given to the negative image of the city. This, as a result, is considered to provoke the perception of the city as an unsafe destination among potential visitors. Hence, while the code *'negative image'* was attached to 15 quotations during the analysis of the Amsterdam interviews, the related codes *'sex and drugs'* and *'unsafe destination'* were linked with 14 and 10 quotations respectively. One of the interviewees explained the relationship between these three codes as follows:

> *"Amsterdam has a lousy reputation... The worst thing is that this reputation is so wide-spread that it would take years to transform it into a positive image... Because of such a negative image, which is mainly based on the Red Light District and the coffee shops, some visitor groups hesitate to come to Amsterdam. They think that it is an unsafe place. They know that the use of soft-drugs is legalised. The rest is a matter of imagination. If there are drugs, there are also drug addicts and dealers. If they are here, there will also be criminals, pickpockets and so on. That is what visitors think of Amsterdam before they come here... However, once they find the courage to visit Amsterdam, their views change dramatically" [Amsterdam Interview: 4].*

The same way that the codes *'negative image'*, *'sex and drugs'* and *'unsafe destination'* were linked with each other, the code *'traffic congestion'* was attached to several other codes including *'central tourist zone'*, *'crowding'* and *'improving infrastructure'*. However, it is important to note that most of the interviewees who mentioned traffic congestion as a weak aspect of Amsterdam, also emphasised the fact that it interferes more with the everyday life of locals than with the short-term experiences of visitors, as one of the main strengths of Amsterdam is its compactness encouraging visitors to explore the city and its attractions on foot or by bicycle. Therefore, it was presumed that visitors would have neither a difficulty in finding a parking space nor waste time in traffic. Traffic congestion and the lack of parking space were supposed to be a problem mainly for people who travel to the inner city everyday for work.

Figure 6.18. Weaknesses of Amsterdam as a Tourist Destination



Besides, the city was considered to be well equipped with sufficient public transportation consisting of regular tram and bus services. In fact, among all the key personnel from the tourism sector who were interviewed, only one of them mentioned that there is a need to improve infrastructure facilities within the city. The code *'improving infrastructure'* was attached to that particular quotation which was mainly about upgrading street decoration and modernising the overall townscape of Amsterdam in residential areas. Overall, the interviewees were confident about the urban infrastructure services provided by local authorities. Given that there are 21 quotations attached to the code *'improving transport options'* in the case of London, and 16 quotations attached to *'lack of sufficient urban infrastructure'* in Istanbul, it may be assumed that Amsterdam benefits from its compactness, which makes it easier to provide consistent and adequate infrastructure services.

However it is such compactness of Amsterdam, which causes a concentration of visitor movements within the very heart of the city where the major tourist attractions and accommodation establishments are. This is why the interviewees repeatedly expressed concern over the central tourist zone and the difficulties of decentralising tourism activities by encouraging new tourism attractions and facilities to emerge in the outer districts of the city. In fact, the code *'central tourist zone'* came third with 11 quotations among all the weaknesses of Amsterdam as a tourist destination. One of these quotations is as follows:

> *"Tourism is quite concentrated in the centre. There is nothing in the South East, for example. The Arena Stadium was built there and draws people to*

sports competitions and concerts. But, people still leave the place after taking part in such events. There is no other reason for them to stay there. There is no shopping centre. There is no other tourist attraction nearby... The tourism potential of the outer-boroughs of Amsterdam has been neglected for a long time" [Amsterdam Interview: 3].

In spite of concerns over centrally located tourist attractions and services, similar views were not raised about the concentration of visitors within the central tourist zone. Only one of the interviewees mentioned a large number of visitors around the Dam during peak seasons. This was the only quotation attached to the code *'crowding'*. As noted above, the reason for a small number of quotations attached to the same code in the case of Istanbul was justified by the lack of a central tourist zone in the city. In Amsterdam, however, it can only be assumed that the stagnant and even decreasing number of visitors over the years may be the main reason why interviewees do not consider a concentration of visitors in certain parts of the city as a disadvantage.

As with Amsterdam, the Istanbul interviewees also raised the negative image of the city as a disadvantage. The code *'negative image'* had 5 quotations and was linked with three other codes; *'unsafe destination'*, *'expensive destination'* and *'overcharge of tourist products'*. Considering that cheapness was shown as one of the major advantages of Istanbul, one could even suggest that there is a conflict between the views of the interviewees who also referred the city as an expensive destination. However, the interview findings clarify that although Istanbul is considered a cheap destination in comparison to some other European destinations like London and Paris, it is found rather expensive especially for domestic market segments.

3 out of 5 quotations attached to the code *'expensive destination'* refer to increased hotel prices in recent years. One of the interviewees stated that the international hotel chains that emerged especially after the mid-1980s, have played an important role in determining accommodation tariffs across the city and have brought the average room rate in line with the other European destinations'. Ongoing economic crises and associated high inflation rates were also shown among the main reasons why Istanbul is seen as an expensive destination. Besides, being the major trade and business centre and the leading metropolitan area in Turkey, Istanbul has always been the most expensive city in the country with regard to the prices of consumer goods, rents, land values and the local cost of living.

Another code, which has a direct relationship with the code *'expensive destination'*, is *'overcharge of tourist products'*. Overcharging of products and services is not a city-wide problem, as many organisations display prices of their products or services either in the form of price tags or by displaying price tariffs where they are visible to consumers. However, in some parts of the city especially where international visitors are found in large numbers, there is a well-established habit of concealing the real price of a product and demanding two to three times more than its usual price from an international visitor. As the interviewees noted, overcharging is mainly practised by small-sized souvenir shops that expect their customers to bargain over the initially offered price until it is reduced to an amount they can afford. Taxi drivers were also said not to use their fare indicators with the hope of demanding more than the real cost of their service from visitors.

The interviewees who cited overcharging as one of the main disadvantages of Istanbul, also stressed that such duplicity can only be eliminated through regular education programmes aimed at changing the attitudes of key tourism personnel who are in direct contact with visitors. The following quotation underlines the problem and suggests how it can be solved:

> *"Unfortunately, visitors are overcharged for certain products or services. In many cases, tour guides feel responsible to warn incoming groups to bargain before they purchase anything. It is something, which may be experienced in all sorts of destinations around the world. What happens is that retailers consider tourism as a luxurious consumption and suppose that there is no harm in making more profit out of visitors who are ready to spend a certain amount of money to buy souvenir goods. They also take the fact that visitors would be haggling over the fares into consideration... Overcharging cannot be eliminated by local authorities alone. In addition to educating tourism staff, the authorities, ranging from the Municipality to Ministry of Monetary Affairs, should work together to overcome this problem" [Istanbul Interview: 6].*

The other code, which is thought to be associated with the negative image problem of Istanbul, is *'unsafe destination'*. When the nine quotations linked to that particular code are examined, two factors arise as the main sources why Istanbul is perceived as an unsafe city. First, the stakeholders related this to terrorist attacks, which have taken place in the city in recent years. Secondly, they mentioned the preconception of potential visitors who picture Istanbul as an unknown, chaotic and oriental place prior to their travel. The reasons why the city still suffers from such a negative image constituent, meantime, was shown as the lack of relevant information transformation to potential market segments.

While the images of both Amsterdam and Istanbul were believed to be damaged by such disadvantages, London whose positive image stands out as one of its strengths, was also cited as an expensive city by interviewees. In fact, among all the case study cities, London has the highest number of quotations (8) attached to the code *'expensive destination'*. In addition to the unsubstantial preconception of potential visitors who assume London to be expensive, the interviewees also hinted at some tourist products and services especially in the accommodation sector, which are not always necessarily good value for money. Few remarks were made in relation to some hotel organisations charging unjustifiably high room rates regardless of their classification. The strong sterling against other international currencies was also thought to result in London being more expensive in comparison to other European destinations competing in the same markets.

'Lack of conference centres' and *'short duration of visitors' stay'* are the two other codes related to the exceptional disadvantages of London and Amsterdam respectively. While five of the London interviewees emphasised the significance of a large conference centre in order to compete more effectively in the conference tourism market, four interviewees from Amsterdam stressed the need to extend an average visitor stay especially by encouraging visitors to participate in attractions to be developed in the outer districts. *'Seasonality'* and *'lack of accommodation'* were also among the common disadvantages of all three cities and are dealt with in further detail in the Sections 6.4.1 and 6.4.3.

To conclude, the case study cities have both common and distinctive weaknesses, which have either a direct or indirect impact on their tourism sector. Some of these weak aspects are urban-based issues such as infrastructure and transportation problems. There are also tourism-oriented problems such as crowding caused by large numbers of visitors in central tourist zones. Nevertheless, it is not always easy to distinguish the weaknesses of such city destinations, since what may be a problem for residents and local authorities, may be a pulling-factor for urban visitors. Similarly, what may be considered as a weakness when targeting a particular market segment, may be a strong aspect for another.

Therefore, although the tolerant approach of the local authorities toward the use of soft drugs is regarded as a major component of Amsterdam's negative image, the same characteristic, which was also thought to indicate friendliness and hospitality of locals, was also repeatedly mentioned as a strong aspect by interviewees. Similarly, no matter how crowded London becomes, there may still be visitors coming to the city in order just to experience a hectic life style in this leading world destination. Thus, it is rather difficult to decide when such disadvantages really become threats and when they actually stop attracting visitors.

6.3.3. The Future of the Cities as Tourist Destinations

In a SWOT analysis, the strengths and weaknesses of a product are examined with reference to the current status in the market and the relative competitiveness. Threats and opportunities, meantime, mainly refer to potential to grow or decline in the foreseeable future under the influence of various factors and their predicted effects on a destination. Such influential factors are considered to play an important role in determining the relative position of the destination in the future either by enriching strengths even further or by diminishing the potential to reach wider market segments. Since marketing is a dynamic process with various factors affecting the decision-making process of potential customers, the threats and opportunities identified especially for the tourism offer of the destination, inarguably change over time in the same way that its strengths and weaknesses do.

Some of the threats and opportunities associated with the three cities as tourist destinations, are shown in Table 6.9 and 6.10, and are gathered from various sources in the literature. As can be seen in the tables, some of the issues such as difficulties with public transportation and newly-built tourist attractions, are specific to a single city and its tourism sector. However, there are some universal issues which are thought to be influential not only for the case study cities and other urban destinations, but also for all types of tourism organisations and destinations world-wide. Such global concerns include changing market trends, new consumer segments, increasing competition and technological improvements easing communication between potential customers and service providers.

Accordingly, in order to reveal the threats and opportunities of each city, the responses of interviewees to various questions were cross-examined following the primary data collection and the conduction of interviews in the selected cities. In contrast to questions about the advantages and disadvantages of each city and its tourism sector, a similar approach was not followed regarding threats and opportunities. In many cases, the interviewees had already covered how they saw the destination and its tourism sector being affected by external or internal factors. In order to detect their views on possible threats and opportunities further, they were asked how they saw the future of the destination and its tourism sector. While the responses covered varying issues ranging from tourism management to increasing competition, the product-based factors are presented in this section.

6.3.3.1. Threats

Some of the issues mentioned by the interviewees as displayed in Table 6.9 are clearly linked to the weaknesses of the cities and their anticipated future effects unless precautions are taken. Traffic congestion and inefficient public transportation lagging behind anticipated future demand in London, an unsafe image induced by terrorist activities in Istanbul and the public policy toward sex and drugs in Amsterdam were all shown as *'threat factors'*. Increasing competition among destinations and the changing expectations and characteristics of potential visitors were also considered to sound warning signals, as concerns were raised on the probable failure of leading urban-decision makers and marketers to adapt tourism marketing and development according to rapidly changing market trends.

In the case of Amsterdam, the major threat to the tourism sector is considered to be its negative image and its associated ongoing effects in the future. The problems caused by the *'negative image'* have already been discussed in the previous sections and will be further analysed in Chapter 7. However, it is important to note that a major landmark attraction, which could have substituted the existing and rather unpleasant image constituents, could have helped accelerate the process of image transformation, and its lack is shown as a product-related aspect of this particular weakness of the city.

Dahles (1998) argues that a lack of a world-wide known monument or a building has limited the potential of Amsterdam to compete as a cultural destination in Europe. This issue was frequently raised by the interviewees. Half of the Amsterdam interviewees stated the importance of landmark attractions in marketing city destinations, while two of them mentioned the problems caused by the absence of such an attraction in Amsterdam. The following quotation from the interviews summarises such criticism:

> *"We do not have a landmark which can be associated with the overall tourism offer of Amsterdam... It is not a matter of creating new logos or slogans. It is something like the Statue of Liberty or the Eiffel Tower that we need... There has been some discussion on whether we can build one. At one stage, there was the idea of building a giant tulip in the city centre. But it does not work like that. Landmark attractions, in many cases, are not just symbols. They have certain historical or cultural values. They are not just built to be symbols or mascots. They are tourist attractions with individual stories" [Amsterdam Interview: 3].*

While there are famous museums such as Rijksmuseum, Van Gogh Museum and Anne Frank's House in Amsterdam, they are thought to be relatively unknown among potential visitors. As will be discussed later, in addition to the components, which together form a negative image of the city, it is the nation-wide symbols including tulips, clogs and windmills that are highly associated with the tourism offer of Amsterdam. It is evident that this image problem of the city cannot be overcome in the short-term. However, it will be difficult for Amsterdam to benefit from a newly developed landmark attraction in the foreseeable future, as the compact and historic characteristics of the city together with landscape regulations force urban planners and local authorities to consider the outskirts for new developments. Such developments may help tourism flows to spread across the city. Nevertheless, the intention to associate the tourism offer with a landmark attraction with a major pull-in effect, built close to other attractions in the city centre, would remain unfulfilled.

Table 6.9. Threats of London, Amsterdam and Istanbul as Tourist Destinations

London	• Ever-increasing global competition in terms of price, quality, novelty and the growing accessibility of an ever-wider range of destinations, • More selective and demanding consumers, • Environmental pressures, especially increasing demand on areas already under pressure, • Duplication of effort and missed opportunities owing to lack of co-ordination between the activities of various players and reluctance to work together, • Constraints on investment, • Volatility of demand, owing to external factors such as exchange rates and crises, • Saturated public transport services.
Istanbul	• Ongoing economic crises deterring the economy nation-wide in general and the sector in particular with funding cuts to public tourism organisations, • Uncoordinated management and marketing of tourism by the responsible authorities, • Lack of an effective leading tourist organisation and a marketer in charge of establishing collaboration among the stakeholders, • Changing market trends, consumers have become more educated and demanding, • Overseas competition is better resourced and organised, • The perception of Turkey more as a sea-sun-sand destination among the major market generators including Western European countries, • Terrorist activities diminishing the image of the city, • Increasing population and inward migration deterring the well-being of Istanbul's economy.
Amsterdam	• Negative image associated with sex and drugs, • Increasing competition, • Existing markets reaching saturation point, • Greatest growth in new markets and desire for higher quality services and products, • The Netherlands is not a primary destination, • Population density and environmental pollution, • Maximum capacity of the Schiphol Airport, • Changes in distribution and new marketing activities making competition stronger, • Lack of interest among local authorities on tourism, • Strong guilder.

One another disadvantage of Amsterdam, as frequently referred to in the existing literature, is its mediocre shopping facilities, malls and speciality shops (Jansen-Verbeke, 1994; NBT, 1996; Terwindt, 1990; Jansen, 1989). The efforts of the VVV to promote the city as a shopping centre together with the emergence of partnerships among major retail establishments *-i.e. the Fashionable Heart of Amsterdam and Museum Kwartier-*, has clearly started to encourage shopping tourism in recent years. As announced by the VVV (1999b), the tourism income earned by shops and department stores totalled NLG 2.57 billion, which accounts for 39% of the total recreation and tourism income generated by visitors in the city.

While shops and department stores are the biggest income earners of the sector, Amsterdam is still not recognised as a major shopping destination in Europe. The interview results also reflect this fact, as half of the quotations attached to the code *'shopping'*, were criticising the status of Amsterdam as a shopping destination. The following quotation provides insight into concerns raised by sector stakeholders:

> *"We have concerns about the shopping facilities and their quality level in our city. We neither have enough international department stores nor big shopping malls. Compared to London, which is, in my opinion, the biggest shopping destination in Europe, we have very little. We cannot compete with that... What we have are small and specialised shops that can only attract special interest groups" [Amsterdam Interview: 2].*

Surely the lack of shops in sufficient quantity and quality cannot be regarded as a threat factor, if there are plans to develop this sector or to substitute it with other forms such as business and cultural tourism. However, there are two major reasons why it is thought that the mediocre facilities may jeopardise the image of Amsterdam in the future. First, despite the fact that the city is not seen as a major shopping destination in Europe, the leading tourist authority (VVV) has recently been trying to market the city with special promotional campaigns targeting shopping visitors. While the main message sent to potential visitors with the printed marketing material is that the city has a wide range of quality shopping facilities, the problem may arise, if expectations of visitors cannot be met with the existing offers.

Secondly, such promotional campaigns targeting different market segments seem to be designed to serve the main aim of disengaging the image of the city from its major component -*i.e. 'sex and drugs'*- by diverting attention to other potential tourism forms. The diversity of tourist attractions and recreational activities is inarguably one of the major success elements in urban tourism. However, attention should be paid to the strong aspects of the city, when decisions on differentiating the tourist offer are taken. Without a conspicuous shopping offer and the spatial proximity of supplementary products, Amsterdam may fail to create an inviting shopping environment for its visitors.

In Istanbul, meantime, interviewees were comparatively more comfortable with the variety of tourist attractions, which include rich heritage sites, cultural activities and the natural beauty of the Bosphorus (*see Section 6.2.1.*). Threats mentioned by interviewees were more about the effects of external factors such as the ongoing economic crisis faced by the country and its relentless influence on the sector, the lack of infrastructure facilities induced by persistent inward migration, and uncoordinated efforts of various authorities to tackle such issues. Another factor considered as a potential threat to the sector was the ignorance of the local authorities of unused tourism capacity in Istanbul and its environs.

As Hall (1993) notes, the city embraces many unusual venues for conference and exhibition tourism and has a great potential to become a major culture and religion destination. The same is true for various other tourism forms like shopping, heritage, arts and cruise tourism. Such advantages are yet to be turned into fully-fledged tourism products attracting high numbers of visitors, which, as a result, could benefit the urban economy on a large scale. The following quotations from the interviews underline these problems:

> *"With regard to tourism development in Turkey, the focus of consecutive governments has always been on the holiday resorts along the Aegean and Mediterranean coasts. They have taken heritage cities, like Istanbul, for granted... Istanbul has always been in the brochures with its palaces and mosques. But the tourist offer of the city was not always clearly defined" [Istanbul Interview: 12].*

> *"It was only in 1996 that the Lutfi Kirdar Congress Centre was opened. Until that year, congress tourism was overlooked. For example, the Princess Islands have enormous potential to absorb more congresses and events. However, for the time being, they are full of derelict sites and buildings with squandered historical value... This is a disadvantage of the city at the moment, but it could be turned into an advantage in the future given effective and coherent planning" [Istanbul Interview: 9].*

Among the 11 quotations attached to the code *'future expectations'*, which mainly covered the opinions and expectations of the Istanbul interviewees regarding the threats and opportunities of the city, 7 included similar remarks about the unused potential of the city and its overwhelming capacity to attract more visitors from different market segments. While it was mainly the neglect and failure of public authorities to place the sector in its high-ranking and well-deserved place on the local development agenda, other reasons for the under-utilised tourism sector, were shown as:

- the approach of public authorities in problem-solving and action-taking, which is often subject to red-tape bureaucracy;
- overlapping areas of responsibility of various authorities in the matters of development and planning;
- the early stages of tourism development and the underestimated benefits of tourism;
- lack of skilled and educated personnel, and;
- lack of a concentrated joint effort among the sector stakeholders.

A similar remark about the unused capacity of tourism supply was made by a London interviewee who suggested that the city's potential to grow as an *'arts and entertainment destination'*, is not fully cultivated by urban planners and marketers. However, this quotation was the only one, which stood out from the rest of the favourable 8 quotations attached to the code *'future expectations'*. With regard to the overall tourist product, the London interviewees shared a common opinion that the existing tourist attractions helped the city to secure its leading position among the world-wide tourist destinations. Moreover, such advantageous components are considered to keep the city in the lead in the future. One of the interviewees stressed that:

> *"London will not lose its advantageous position and will remain the leading world-wide tourist spot" [London Interview: 15].*

However, it is important to note that, despite the positive attitudes of the interviewees toward the future of London's tourist product package, the tourism sector in the city was not perceived to be free from other threat factors shown in Table 6.9. Answers to various questions revealed that the stakeholders were concerned about the future effects of various external factors on the sector, along with the lack of confidence in the management and marketing practices of the leading tourism organisations. The issues raised included: increasing competition between city destinations; changing consumer and market trends; improved technology easing accessibility and information transmission; public funding cuts on tourism; inconsistent tourism policies of consecutive governments and; economic crises experienced by the visitor generator countries which, should be heeded as threatening factors. The views of the interviewees on such matters will be further examined in Chapter 7.

6.3.3.2. Opportunities

Opportunities for a city tourist product package are mainly the reflections of the development and planning projects of major urban decision-makers to keep the product attractive to both existing and targeted market segments. Dietvorst (1993a) indicates that development projects, which intend to influence the future of tourism in a city destination, can be looked at from two different perspectives. The first group of development projects and strategies include the city-wide plans to upgrade the overall urban network. The author argues that these strategies can be designed to expand, sustain and even to restrict the existing capacity of the destination and, play an important, but indirect, role in determining its limits to attract more visitors. For example, improvements made to urban infrastructure, restrictions on urban land-use, introduction of provincial taxes on various economic outlets and initiatives provided to encourage international organisations to locate their headquarters in the city, are all urban-wide decisions, which would eventually have bounce-back effects on the number of visitors travelling into the city.

The author identifies the second group of strategies by their characteristic of focusing on the tourism product itself. Such development strategies mainly look into how the tourism product can be further strengthened, sustained, upgraded or preserved. While the latter group is solely tourism-oriented, the challenge for the key players lies in the success of combining various strategies regarding different aspects of the urban mechanism, assuring consistency between different projects and, giving priority to the one which has utmost importance for the well-being of the whole urban area. As the author further notes, the specific goals and restrictive conditions may also urge responsible authorities to consider a spatially differentiated policy between different districts of the city.

Given this information, London stands out from the other two case studies with the higher number of tourism-related projects designed to keep the sector functioning to its full potential. As Table 6.10 shows, in addition to the new attraction developments and ongoing regeneration projects, London is anticipated to benefit from changing market trends and the opening of new market segments owing to its positive image as a tourist destination. In other words, the city is thought to attract the attention of first-time visitors as a classical destination, while repeat visitors are encouraged to experience new offers developed to strengthen its product range.

Table 6.10. Opportunities of London, Amsterdam and Istanbul as Tourist Destinations

London	• New attraction developments in the outer boroughs, • Increasing efforts by the sector to work together and to establish partnerships, • New markets for inbound tourism including Far East and Eastern Europe, • The injection of cash provided by the National Lottery funding, • Increased use of information technology, including the Internet, and packaging of products to improve access to information and ease of booking, • Enhanced profile of tourism generally and, in particular, within central and local government, • Revised structure of the English Tourist Board.
Istanbul	• Its geographical location between Europe and Asia, • Unused land and venues across the city available for new attraction development, • New complexes built for the bidding of the Olympic Games, • Potential growth of both new international markets and domestic tourism, • Rich tourism resources enabling Istanbul to emerge as a cultural and religious centre, • Shopping facilities ranging from multi-purpose complexes to historical shopping malls.
Amsterdam	• Internationalisation of young people, • Increasing need for quality and variety, • Its 'open-air-museum' characteristic, which derives from its compactness, • Introduction and extension of transport opportunities to/within the Netherlands • Market trends in favour of city trips, • The efforts of tourism organisations to concentrate more on culture and shopping facilities than ever before, • The advent of Euro from 2002 is hoped to ease travel within Europe.

The interview results also vindicate the argument that the efforts of the responsible authorities to secure the sector's future by concentrating on new attraction developments in London far outweigh those in Istanbul and Amsterdam. The code titled *'attraction development'* was especially created to compare the views of the interviewees on how they foresaw the benefits of new tourism attractions for the city concerned and how they evaluated the efforts and responsibilities of local authorities to improve the overall tourism offer. While the code has a minimum number of attachments in Amsterdam with 11 quotations, it reaches its peak in

Istanbul with 22 quotations. In the case of London, there are 15 quotations linked to the code.

The higher number of quotations in Istanbul should not be misinterpreted, as less than half of them -*i.e. 10 quotations*- were about the actual developments taking place in the city. The rest included suggestions for the sort of attractions to be built and, on the areas and tourism forms the authorities should focus on in order to boost visitor numbers to the city. In London, however, almost all of the quotations were regarding the development projects, which were either under construction or at various phases of decision-making.

To start with, in London, there has been a great amount of effort put into regeneration projects especially on the outskirts of the city and in places like Greenwich, East London and South Bank. While national projects and government initiatives clearly play an important role in diverting the attention of the public and the interest of entrepreneurs onto such places, the importance of partnership organisations bringing public and private sector members together cannot be denied. As will be discussed in the following chapter, in London, there are various partnerships and associations structured to serve the needs and demands of local communities and trade organisations either within the borders of boroughs or the whole city. While the financial sources provided for each project vary, National Lottery grants have become very popular and have generated millions of pounds for numerous projects in each year.

Among such development projects in London, the Millennium Dome has been the most debated project in recent years with criticisms by the media about its construction in the first place and its consumption of large amounts of public money. Although the Millennium exhibition as a year-long special event has failed to meet the forecasted visitor figures of 12 million (ETB, 1998 and Wanhill, 2000b), the Dome has taken its place among the landmark attractions of London. Pictures of the Dome with reflections of its unique architecture have been widely used by London-based organisations in their promotional material. Therefore, although there are various studies in the existing literature on why the exhibition failed to fulfil its objectives, there is no doubt that its modern architecture has raised the image of Greenwich and London both in domestic and international markets (Smith and Smith, 2000).

During the primary data collection of this research, the Millennium Exhibition site was still under construction and the major discussion regarding the Celebrations was whether the Dome would be completed on time for the grand-opening at the beginning of the 21st century, despite time pressure and funding difficulties. The interviewees were asked whether they consider the tourism sector in general, and their businesses in particular, would benefit from the Millennium Celebrations and whether the Millennium Dome would be a successful attraction. The codes *'benefits of the Millennium Celebrations'* and *'mistrust in the Millennium Celebrations'* were created to categorise the responses of the interviewees to such questions and were attached to 13 and 7 quotations respectively.

As the number of quotations attached to the first code suggests, the majority of the interviewees felt that, if marketed and managed effectively, the Millennium Celebrations and the Dome would be beneficiary for both the tourism sector as a whole and individual tourism organisations in particular. The unanimous assumption was that if more visitors were attracted to the city by such a major event, other attractions would receive increasing numbers of visitors and the average duration of visitors might be extended. Therefore, the Dome was not seen as a rival that would steal visitors from other tourist attractions, but rather as a complementary product enriching the overall package offer.

The other benefits of the Celebrations mentioned by the interviewees included the revitalisation scope for Greenwich and the River Thames. In addition to the strengthened transportation links to Historic Greenwich by an extension of an underground line *-i.e. Jubilee Line-*, the rundown pier and boat services were upgraded with several projects undertaken on the Thames. Other projects like the British Airways' London Eye built in Westminster and the Tate Gallery of Modern Art in South Bank were also welcomed by the majority of the interviewees. The assumption was that the economic benefits of tourism could be scattered across London by locating new attractions in the outer boroughs, which need to be revitalised with new jobs and businesses.

However, there was some scepticism over the success of the Celebrations highlighted by 7 quotations attached to the code *'mistrust in the Millennium Celebrations'*. Among the reasons for such lack of confidence, the following were mentioned by the interviewees and are also supported by the existing literature (Wanhill, 2000b and Smith and Smith, 2000):

- Delayed decision-taking of the Government on the location of the Celebrations;
- The hesitation of the then newly elected Labour government to continue with the project which, as a result, cost both money and time;
- On-going criticism reinforced by the media and an ineffective approach by the authorities to raising awareness of the importance of the Dome and the Celebrations;
- Belated efforts of the authorities to educate locals and tourism organisations about the concept and necessity of the Celebrations and their economic, social and cultural effects on London and Greenwich;
- Competition from other special events and celebrations across the world *-i.e. Summer Olympic Games in Sydney, Expo Fair in Hanover, and the special religious tours to Rome and Jerusalem in 2000-*;

- The focus of marketing efforts on the domestic market and the belated attention shown to international market segments, and;
- A complicated and unknown product for the average potential visitor and the impractical policy of an advanced-ticket scheme, which restricted especially international visitors, who have limited time to spend in the city, from purchasing tickets on-site.

Another opportunity for London is the profound efforts of local authorities and partnership organisations to keep the city as a competitive destination not only by enriching its offer with new attraction proposals or the improvement of existing ones, but also doing that through systematic planning and evaluation of the sector both on its own and as part of the whole urban environment. In addition to regular strategic development and action plans of the local, regional and national tourist authorities, partnership organisations also include various expansion and improvement projects and tasks in their agenda. In addition to recently completed attractions like Vinopolis (a wine museum), the IMAX cinema, Shakespeare's Globe Theatre, British Museum Great Court Scheme, Tate Gallery of Modern Art and Trocadero, the following projects are either proposed, supported or constructed by organisations through joint-efforts (LTB, 1996; London First, 1997; London First, 1998b; CLP, 1998; PLP, 1999):

- The proposed extension of the Channel Tunnel to St. Pancras;
- The CrossRail project connecting Shenfield to Aylesbury with 5 stations in central London;
- The construction of a new terminal building at Heathrow Airport *-i.e. Terminal 5-*;
- A new underground line to run between Chelsea and Hackney;
- An international cruise-liner terminal to be built in East London with complementary projects including hotels, a shopping centre and an aquarium;
- Improvement and re-development of major tourist attractions like Royal Albert Hall, Victoria and Albert Museum, Science Museum and London Zoo;
- Expansion of Wembley Stadium to make it as a National Stadium;
- Pedestrianisation schemes for central London and in major tourist zones including Oxford Street, Soho, Bankside, Tower of London and Trafalgar Square;
- Battersea Development Projects with proposals of new hotels, theatres, an exhibition centre and a post-production film studio built in the area;
- Revitalisation of the White City area as a shopping centre, and;
- Building an international convention and congress centre.

In Amsterdam, compared to London, tourism-based development projects are limited both in scope and quantity. This was supported by the interview findings, as the code *'attraction development'* had its smallest number of attachments among the selected cities, with 11 quotations. In fact, two of the most recent attraction developments in the city were opened by the end of the 1990s. The New Metropolis Science and Technology Centre, which is an interactive science museum located in the vicinity of other major attractions such as Maritime Museum and Artis Zoo, was opened in 1997. The Amsterdam Arena was built in the southern outskirts of the city and has been hosting major sports competitions, business conferences and music concerts since its opening in 1996.

Kahn and Van der Plas (1999) list other projects under consideration by the authorities as:

→ a new underground metro running North-South via Central Station;

→ a project to revitalise South East where the Amsterdam Arena is located, as a sports and entertainment centre;

→ high speed international train linking the Netherlands with France and Germany via Schiphol Airport and Central Station;

→ a new passenger terminal at Schiphol Airport;

→ the expansion of Westpoort Harbour, and;

→ the new outer ring road between harbour and airport.

As mentioned earlier, the so-called *'IJ Waterfront Project'* has been running since the early 1980s, and has undergone various stages and financial difficulties caused by disagreement between the public and private members of the partnership organisation, which was established to carry out consecutive development programmes. In contrast to the local authorities' aim to combine a business district with new housing and recreation opportunities for potential residents, private sector partners emphasised a need to build more top-quality office space (Jansen-Verbeke and Van de Wiel, 1995). As a result, the completion of the project, which was initially proposed to be achieved within an 8-year time period, has been postponed repeatedly due to cuts in public funding.

The IJ Waterfront Development Project cannot be regarded as a solely tourism investment, as it covers a wide range of business, recreation and housing projects to be completed along the banks of the River. In this sense, it is almost like a duplication of the London Docklands Development Project, which aimed to revitalise a rundown city fringe by introducing new forms of economic use for the derelict sites and buildings in the area. Therefore, the initial target groups of the project are entrepreneurs and residents. Recreation-based projects are mainly embraced as supplementary components and are considered to improve the quality of life within the area. Nevertheless, the project includes a new conference and exhibition centre, a shopping mall, luxury hotels, a modern art museum and a theatre, which aim to draw visitors as well as locals. Together with a new cruise terminal, railway and motorway links are also projected in order to make the developments accessible (Harding, 1994).

Among the 11 quotations attached to the code *'attraction development'*, more than half were about the IJ project in Amsterdam. While three interviewees suggested that the city needs more tourist attractions and services, without any reference to a particular development project, two interviewees mentioned the renewal and extension schemes run by their individual organisations. 6 quotations about the IJ project, meantime, indicate that it is the only development scheme that citywide organisations are interested in. Despite the higher recurrence of the project throughout the interview findings, not all of the six quotations were in favour of the project and its proposed benefits for the tourism sector. Scepticism about the project revolves around two major issues.

First, the interviewees were concerned about the seemingly everlasting *'construction'* phase of the project, which is regarded as an unproductive commitment that is yet to produce an explicit outcome in spite of the 20-year long planning. Secondly, the interviewees were not fully convinced that effective utilisation of the project, which puts an emphasis on more office space and residential housing, would help the sector to benefit from diverted tourism flows toward this deprived outer fringe away from the central tourist zone. The following quotations provide further insight:

> *"The northern axis of the River IJ was chosen as a new development area more than ten years ago... The initial aim of the local government was to attract big international business companies. That did not work. It was too risky for such companies to locate their headquarters in that area... Then the plans changed to include residential areas and recreational facilities... Tourism was finally added to the projects at a much later stage... Personally, I do not think that a first-time international visitor would prefer the newly developed and modern area to the traditional houses and canals in the historic centre" [Amsterdam Interview: 3].*

> *"To a certain extent, (the IJ project) may be promoted as a new business district, and business tourism can be nurtured in the area. But the area has no relation with the history of the city. The history of a cultural destination does not go well with modern skyscrapers and trade centres. That may be a different form of tourism, mainly for business travellers and maybe for national visitors and locals. But how would you encourage visitors to travel outside the centre, even though you might have superb transportation links?" [Amsterdam Interview: 6].*

In the case of Istanbul, although the code *'attraction development'* was attached to the highest number of quotations throughout the interview analysis, more than half of the statements on the subject were actually recommendations regarding possible expansion of the sector through new developments, rather than actual plans or projects. Among the 12 quotations, some stressed the need to concentrate on certain tourism forms such as heritage, conference and religion tourism when both nation-wide and local development plans are prepared, while others were about the renewal and improvement of the existing attractions and inadequate infrastructure services.

There were also quotations regarding existing development projects and programmes. Two of the interviewees referred to the new international terminal at the Ataturk Airport and a new airport on the Asian shore, both considered to improve the accessibility of the city. While both of the projects were still at the phase of construction during the conduction of interviews, they were both completed by the end of the 1990s. The Sabiha Gokcen Airport aims mainly to serve domestic and charter flights and was opened in 1999. The new airport was built in a year following a ten-year preparation phase including public acquisition of the site and the endorsement of financial sources. A new terminal for international flights, meantime, was planned to increase the existing passenger capacity of the Ataruk Airport to 14 million passengers a year at a cost of $306 million. The construction work was finished in 2000 when the terminal started serving mainly inter-continental flights to/from Istanbul (TCIV, 2000).

Other tourism-based projects mentioned by the interviewees were a new culture and congress centre in Southwest Istanbul -*i.e. Ayazaga district-*, and the renovation of historic houses and buildings operated by the local government in the Historic Peninsula. While each of these projects were mentioned by a single interviewee, wider knowledge of existing schemes among interviewees was reflected in 4 quotations concerning the projects of the Istanbul Olympic Committee, which were undertaken to prepare the city for the bidding of the summer Olympic Games. In fact, in addition to the inclusion of these particular projects during the evaluation of the code *'attraction development'*, the high recurrence of the city's nomination within the interview findings, required the creation of two other codes titled *'Olympic Games' benefits'* and *'mistrust of Olympic Games'*. These codes were attached to 4 and 7 quotations respectively.

Istanbul has been bidding to host the Games since the authorisation of the Turkish Olympic Law in 1992 by parliament. The city has, so far, applied to host the 2000, 2004, 2008 and 2012 Olympic Games. The major responsibility of the Istanbul Olympic Bidding Committee (IOBC), which was established according to the law concerned, is to affirm the candidature of the city for the forthcoming Games. Therefore, no matter how long it may be before the city actually hosts the Games, the Committee is obliged to carry on running bidding campaigns until it brings the event to Istanbul. While the IOBC is set up as a public organisation, its existence is secured with permanent funding originating from various sources ranging from National Lottery funds to allocations made from the budget of the Greater Istanbul Municipality (IOBC, 1997).

Although the International Olympic Committee (IOC) selected Istanbul as a candidate eligible for running the Games during its previous bidding campaigns, the city lost the Games to other candidates, namely Sydney, Athens and Beijing for the 2000, 2004 and 2008 Olympic Games respectively (IOBC, 1997). Although the city is yet to be selected as a host city by the international committee, the IOBC has been involved in many projects to strengthen the city's candidature. In addition to the sports stadiums and complexes, which are either completed or under construction across the city, the Committee supports other development projects proposed through joint efforts by various organisations in sectors ranging from hospitality to transportation, from communication to security. As well as the Olympic Stadium being built with 80,000 spectator capacity, there are projects to build new hotel establishments, to open the military airport in Corlu to international air traffic and, to expand the network of existing metro and tram lines in Istanbul (IOBC, 1997).

Among the 11 quotations regarding bidding by Istanbul and the projects undertaken or proposed by the IOBC, 4 of them were about the beneficial effects of the Games for both the city in general and the tourism sector in particular. It is thought that the hosting of the Games and the long-term preparation phase prior to the actual hosting would draw the media's attention to the city and its preparations. In addition to the potential economic benefits of such media attention and promotional income, the city would be promoted to diverse population groups around the world. Hence, the awareness of Istanbul among potential market segments would be raised.

The selection of Istanbul as a host city was also considered to give impetus to major urban development projects, which are postponed mainly due to bureaucratic and financial obstacles. Such obstacles reinforced by ongoing economic crises affecting not only the urban economic system in Istanbul, but also the economic stability of Turkey on a nation-wide scale, would be mitigated, as the Games would attract and originate increasing funding sources. While the city would be placed top of the priority list for nation-wide development schemes, there would be exclusive efforts to improve the urban infrastructure with renewal, expansion and newly created projects as well as associated developments to improve the social, cultural and environmental attractiveness of Istanbul. The following two quotations provide further insight into such benefits:

> *"We have a very young population in our city... The Olympic Games could be a great instrument in finding new jobs for these people. It all depends on whether the new complexes and attractions built for the Games can be transformed into effectively functioning operations after the actual event. Besides, people would be trained and educated about the benefits of sports... It may play a catalyst role in enhancing the city's image as a sports centre both in the national and international arena" [Istanbul Interview: 7].*

> *"I do not see how the city and the tourism industry could not benefit from the Olympic Games, if the proposed projects are completed on time together with improvements made to urban infrastructure. There would be an initial increase in visitor numbers in the short-term. In terms of long-term benefits, it would be a one-off chance to promote both Istanbul and Turkey world-wide... We know how Barcelona and Seoul were made well-known to people around the world... They have taken their place among the major world cities. The Games strengthened their credibility in terms of their economic and cultural attractiveness" [Istanbul Interview: 16].*

Nevertheless, the majority of the interviewees expressed opposing views on the realisation of the Olympic Games in Istanbul, as 7 out of 11 respondents did not think that the city was ready to organise such a major event due to inadequate urban infrastructure and a lack of qualified manpower. There were also several remarks made on the neglect of the responsible bodies to strengthen co-operation among various parties, which can play an important role in the selection of the city. In fact, 5 of the interviewees stated that the authorities did not contact their organisations to obtain support for bidding campaigns. Considering that the interviewees in this research were chosen from organisations representing the major stakeholders of the tourism sector, the scope for city-wide co-ordination and support in preparing the city for the Games, is debatable:

> *"Bidding for hosting the Olympic Games is all about team work... That is not what is happening in Istanbul. Nobody from the IOBC has come to ask whether we would be willing to support the campaign. I have personally worked with the Sydney Olympic Committee and have taken an active role in the preparation phases. I think that such an experience could be of some help to the IOBC" [Istanbul Interview: 5].*

> *"Compared to the other candidate cities, Istanbul needs to be doing more to have the Games here. Before we apply, we should have reached a stage where Istanbul has upgraded its infrastructure with new motorway rings and underground lines... It would be better to get experienced of organising other national and international events, before we nominate ourselves to host such an important one. Personally, I think it will be at least another 10 years before we fulfil that dream" [Istanbul Interview: 9].*

In addition to the projects covered by the IOBC, other urban development schemes, all of which are at the stage of consideration, proposed by the local authorities are listed below (IOBC, 1997 and TCIV, 2000):

- the project to build either a third bridge or an undersea tunnel connecting the two shores of the Bosphorus;
- the opening of the military Corlu Airport to civil aviation flights with a 2000-passenger capacity terminal;
- two extension lines to the existing underground network;
- expansion of the light rail tram services currently running between the districts of Sirkeci-Aksaray, Sirkeci-Zeytinburnu and Aksaray-Bakirkoy;
- a new tram line on the Asian side of the city;
- the Mega Centre Project in Bayrampasa, which would include shops, office space, restaurants and recreation activities, and;
- the renewal and expansion of the inner-city Haydarpasa Port.

To conclude, some of the development, improvement and revitalisation schemes carried out and proposed by the selected cities, were all thought to have beneficial effects for the tourism sector, although the interviewees also raised concerns regarding the effective management, marketing and utilisation of certain projects. Criticisms were mainly raised with regard to the role of tourism as a catalyst in such projects, the likely economic and social effects of the projects on both the sector in particular and the urban network in general and, the lack of co-operation among tourism organisations. London has stood out from the other case study cities with a higher number of development projects. While new tourism developments agreed by the local authorities in Amsterdam were found to be limited, Istanbul, as a developing destination, was considered to need more attention to both enriching the tourism offer and upgrading its infrastructure services.

Clearly, new attraction developments and improvements on urban infrastructure are not the only opportunity factors determining the future of these destinations. As shown in Table 6.10, there are various other internal and external factors, which could play an important role in shaping the sector. However, since the aim of this chapter is to examine the case study cities as destination products, only the product-related opportunity factors were taken into account when presenting the findings of the research data. The other influential factors will be evaluated in the following chapter when the marketing and management of the cities are investigated.

6.4. Carrying Capacity Analysis

The SWOT and life cycle analyses applied to the each case study city, have provided some insight into the current status of the tourism sector in London, Amsterdam and Istanbul and, the efforts of local authorities to grow the tourism sector further. However, as discussed in Chapter 2, the dynamic characteristic of these urban destinations and their tourist product packages, can be better understood by combining the results of these analyses, with a further investigation into their carrying capacity. While the results obtained from the first two analyses are hoped to create a viable framework for the destinations as marketable products, the carrying capacity analysis is applied in order to identify the merits of potential growth in line with the manageable capacity limits of each city.

Despite its importance in guiding planning for sustainable tourism development, determining carrying capacity limits is not always easy or explicit. The difficulties of capacity estimations are so apparent that, analysis hinges upon some assumptions when applied to real life applications. Various internal and external factors including: the priority of tourism in national and local policy agendas; accessibility of a destination; tourist seasons; market segments; behavioural patterns of visitors; the existing infrastructure services; the management of individual attractions and; the changing attitudes of the host community toward tourism, should all be taken into account when attempting to measure capacity levels. (WTO, 1994 and 1993). The uniform way of identifying an optimal carrying capacity limit of a destination is by comparing a standardised tourism unit *-i.e. number of hotels, visitor arrivals and, the time and space distribution of visitors-* either with the same unit of another destination or with another destination-based factor *-i.e. the level of pollution and the number of residents-* (Cooper et al., 1999). While a single ratio achieved from such comparison estimations may be misleading, a number of comparisons should be supported by empirical information on the utilisation of the sector in the destination. This way, the results of the analysis can be related to the evident importance of the sector and its capacity limits as opposed to the effects of other urban functions, sectors and industries.

Such a complex concept of the analysis becomes two-fold when the intricate structure of urban networks and their manifold tourist products are taken into account. While the major aim of carrying capacity analysis, in the notion of *'sustainable tourism'*, is to identify an optimal number of visitors that a destination can accommodate with its existing physical, social, economic and environmental resources (Cooper et. al., 1999), urban areas can take advantage of their scale, which facilitates absorbing large number of visitors within their densely populated agglomeration.

However, urban destinations, too, have their limits in attracting visitors. Although a recent concept as a catalyst to rejuvenate run-down areas, which appeals to urban authorities, tourism cannot succeed in sustaining the urban environment on its own in the long term. In addition to an effective integration of tourism into the overall economic system of an urban core, regular and coherent strategic plans should be prepared to maintain the balanced growth of the sector. Prior to executing marketing activities according to strategic plans and programmes, urban marketers should be equipped with relevant information on both the achievable and the acceptable levels of visitor numbers that are targeted.

Given this intricate concept of carrying capacity, an ideal analysis would put the tourism sector under a microscope with the aim of conducting a detailed investigation of its product, policy and market aspects together with other urban functions and communities, which have direct or indirect effects on the sector. While such an application is difficult to conduct, if not impossible, financial and time limitations restrict this research to concentrate on certain components of the case study destinations. Hence an assessment of the cities' tourism offers is provided below with emphasis on the product-related components of the destinations.

6.4.1. Accommodation

The provision of accommodation in any destination plays an important role as an imperative component of the tourism sector. Since the greatest share of visitors' expenditure usually goes to the accommodation industry in tourist destinations, the influential economic impact and the prosperity of the tourism sector can only be sustained by the provision of accommodation opportunities at sufficient number and quality (Law, 2002). The sector is the foremost component of a tourist product package to be examined, when decisions are taken in relation to the physical capacity limits of a destination. The difference between the number of visitors attracted to the destination and its total hotel-room capacity gives clear indications as to whether the destination meets demand or fails to accommodate visitors with its existing accommodation stocks.

Compared to rural destinations and holiday resorts, city destinations are expected to benefit from a wider range of accommodation supply serving various market segments. Their historical importance as trade, education, culture and government centres often results in a stable and continuous flow of visitors seeking accommodation, which, consequently, assures various types of hotel establishments to emerge throughout their evolution process. Therefore, while interest shown in tourism development by urban authorities may have occurred only since post-war economic recessions induced by manufacturing industry leaving the inner-city for rural areas, urban hotel developments by the private sector are not recent and are continuing.

6.4.1.1. The Accommodation Sector in London

The life cycle analyses of the case study cities have already shown that there were certain types of hotels and lodges in the cities long before mass tourism started to prosper toward the end of the 20th century. The tourism sector in London, which is arguably the most popular city destination among the three cities, has grown substantially since the 1960s and reached a total of 28 million visitors in 1999. In the same year, domestic and international visitors to London spent over 120 million nights in the capital (LTBCB, 2000a).

While regular summer surveys conducted by the London Tourist Board (LTB) show that only 30% of international visitors stay with their friends, the rest seek various types of accommodation provided by the city (*see Table 6.11*). For the domestic market, however, the ratio of accommodation usage is the other way round with 74% of all domestic visitors staying either with friends and relatives or in second homes and timeshare properties (LTBCB, 2000b). In other words, almost half of all visitors to London stayed in commercial accommodation in 1999. If the average nights spent in London are considered to be 2.3 nights per visitor as suggested by LTBCB (2000b), it can be assumed that over 30 million nights were sold to visitors by organisations ranging from deluxe hotels to youth hostels in 1999.

Table 6.11. Type of Accommodation Used by International Visitors in London

	1995	1996	1999
	%	%	%
Hotel/Guest House	68	54	51
Friends or Relatives	23	22	30
Youth Hostel/College	3	13	11
Rented House/ Other	3	5	5
Paying Guest	2	3	2
Other	1	3	1

***Source*:** LTBCB (2000a).

Such figures help to estimate whether the total stock of rooms in the city is able to meet the present demand and the anticipated growth in the coming years. As Table 6.12 shows, the total number of accommodation establishments increased by more than 10% between 1998 and 2000, creating over 7,500 new bedspaces. Given that the London Tourist Board is not expecting an immense growth in visitor numbers within the next couple of years owing to the negative effects of foot and mouth and the strong pound on the sector, a uniform formula used to calculate the need for bedspace in tourist destinations (*see Appendix 15*), shows that the existing stock of accommodation is enough for such demand. In fact, the known stock would only be threatened in terms of capacity limits, if the total visitor number exceeds a figure of 42.5 million, given the 2000 figures of variables including room occupancy rate, average length of stay and fraction of visitors using hotels remain unchanged.

Although such calculations are made in order to provide insight into the used accommodation stock in London, it is hardly the method to determine the exact limits of carrying capacity in the city. In fact, the research projects undertaken by academics, local authorities and partnership organisations, all demonstrated a need for more hotel outlets in the city until the end of the 1990s (LTB, 1996; Bull, 1997; London First, 1998b). In many cases, the need was justified by increasing visitor numbers and higher occupancy rates in comparison to other major European destinations. In 1996, Paris, Frankfurt, Madrid and Rome all had lower room occupancy rates - *i.e. 69%, 66%, 67% and 80% respectively*- than London, which achieved a favourable rate of 84% in the same year (London First, 1998b). In addition to such a high occupancy rate, a high fraction of hotel use among international visitors is also considered to require more hotel rooms. The city, which was prepared for the Millennium Celebrations at the time and was witnessing new tourism developments in places like Greenwich, Southwark and Docklands, was presumed to suffer from a lack of an efficient number of hotel operations especially at the lower end of the market.

Table 6.12. Known Stock of Accommodation in London

	Number of establishments		Bedspaces	
	1998	2000	1998	2000
All serviced Accommodation	1,036	1,170	144,633	152,836
Group&youth Accommodation	129	127	28,268	28,818
Self catering*	190	212	6,008	6,191
Caravan&camping sites**	7	7	1,153	1,171
TOTAL	**1,362**	**1,516**	**181,424**	**189,016**

* Units

** Pitches

Source: LTB Statistics.

As a result, the London Tourist Board identified a target for 10,000 new hotel bedrooms in the capital between 1995-2000 (LTBCB, 2001a). As the organisation was aiming to ensure an increasing number of visitors and to divert visitor flows across the city and toward the outer fringes, the boroughs were encouraged to provide initiatives in the form of granting planning permissions. Given the condensation of the existing accommodation stock in Central London, where free land is as difficult to find as it is expensive, priority was given to South and East London (LTBCB, 1997b). A recent report by the LTBCB (2001a) shows that the target of 10,000 new hotel developments was exceeded by 22%, as more than 7,500 new rooms were added to the total room capacity of the city during the period 1998-2000 (*see Table 6.11*). Moreover, the new developments, which were granted permission by the London boroughs between 1995-1997, had a total room capacity of 15,000 (London Research Centre, 1998).

The efforts to spread new hotel developments across the city boundaries was encouraged by the positive attitudes of the London boroughs of Southwark and Greenwich, which have both undertaken tourism-based revitalisation schemes since the late 1990s. In addition to the recognition of tourism as a major income-earner sector in the Unitary Development Plans of the boroughs, the emergence of new partnership organisations such as the South East London Visitor Initiative, the Pool of London Partnership, the Greenwich Waterfront Development Partnership and the Greenwich Development Agency, has accelerated the development process in these areas through the provision of grants and loans as well as advisory and consultancy services to investors. Similarly, the Docklands, where revitalisation programmes have been running since the 1980s, has drawn attention as a new and modern business centre of London and has retained a notable share of the new supply of accommodation. The only other outer fringe of London, which continues to benefit from hotel developments is Hillingdon owing to the Heathrow Airport and its improved accessibility by the M25 motorway ring-road (London First, 1998b).

Despite the fact that new hotel developments have enriched the accommodation supply in the outer boroughs, it is still in central London where 50% of all hotel organisations are located (*see Section 6.4.2*). Whether or not the aim of the LTB to expand the room capacity at the lower end of the market has been achieved, is open to debate. As Table 6.13 shows, although the number of establishments with more than 100 rooms increased by only 11% between 1996-2000, they have consisted of more than 70% of the total new bedspace created in the city. If one assumes that the larger a hotel outlet gets, the more likely that it serves the upper-end of the market, it can be presumed that the majority of new developments were built as large establishments rather than guest houses and B&B *-i.e. bed and breakfast-* outlets. In fact, a report by London First (1997) lists some of the new 4*, 5* and deluxe hotel developments and extension projects to the existing high-end hotel establishments, which were expected to add at least another 2000 new rooms to the accommodation sector by 1999.

In London, it was rather difficult to classify different accommodation outlets according to the quality of services provided, until very recently. This was mainly because of the confusing and divergent grading schemes, which meant dissatisfied customers and uncontrollable pricing strategies practised by numerous outlets whose inconsistent ratings were determined by three different schemes. The annual surveys among international visitors to London, which are conducted by the LTBCB, show that a remarkable proportion of visitors who stayed in serviced accommodation, were dissatisfied with both the quality of services provided and their value for money. In 1997, 30% of international visitors surveyed expressed view that such accommodation failed to meet their expectations (LTBCB, 1997a).

Since the unclear and unsynchronised grading schemes were blamed for dissatisfied international visitors who are confused about what to expect from each type of accommodation outlet, a new uniform scheme was introduced with agreement among the authorities of the existing three schemes *-i.e. the English Tourist Board and two motoring organisations (the AA* *and RAC)-*. The new scheme, which classifies hotels from one to five stars and, guesthouses and B&B organisations from one to five diamonds according to their service quality, was launched at the end of 1999. As nation-wide unification of accommodation grading could not be achieved as Scotland and Wales do not participate in the new scheme, it is thought to take several years before the transformation process is fully completed in England. Although the number of accommodation outlets which have adapted their grading according to the new scheme, is increasing, it is still very early to decide how fast the London tourism sector will start to benefit from the new scheme.

Table 6.13. Distribution of Rooms in Accommodation Outlets in London

	1996		2000	
Bedrooms	Number	Bedspace	Number	Bedspaces
201+	**90**	70,693	**98**	77,420
101-200	**84**	23,339	**100**	28,249
51-100	**134**	18,406	**136**	18,967
26-50	**184**	13,007	**211**	15,453
11-25	**271**	8,954	**292**	9,923
4-10	**125**	1,770	**144**	2,002
1-3	**72**	330	**189**	822
TOTAL	**960**	**136,499**	**1,170**	**152,836**

Source: BTA/ETB (1996) and LTBCB (2000).

A recent report by the LTBCB (2001a) states that the two major aims identified according to the needs of the accommodation sector in the 1990s, have been accomplished, to a certain extent, through the concentrated efforts of both the local authorities and partnership organisations prior to the Millennium Celebrations. These aims, as stated above, were to expand the accommodation stock by building new hotels across the city and, to introduce a new harmonised classification scheme for all serviced accommodation establishments. The same report also emphasises that the aim of the organisation is no longer to encourage a vast number of new hotel developments, but to upgrade quality levels in the existing ones. Since the forecasts do not show an immense growth in visitor numbers within the forthcoming years, it is thought that the current accommodation stock would be able to meet the demand for serviced accommodation. This argument is justified by the reduced average occupancy rates in the city *-i.e. 85% in 1998 and 80% in 2000-*. Besides, the share of international visitors who stay in hotels and guest houses in London, also dropped from 68% in 1995 to 51% in 1999, while the share of those who stayed with friends and relatives increased (*see Table 6.11*).

To sum up, the recent reports by the LTBCB and the analysis of statistical information on the accommodation sector in London, suggest that the number of hotel establishments is satisfactory for the demand concerned and, is not giving warning signals with regard to impending physical capacity limits. The interview results of this research, however, reflect a different viewpoint, as there are 9 quotations attached to the code *'lack of accommodation'*. More importantly, 19 quotations linked to the code *'accommodation'* shows how much importance the interviewees attach to the sector for the sustainability of the sector. The following quotation is an example of such views:

> *"Once a person decides where he wants to take his holiday, he mainly concentrates on two things: how to travel to the destination and where to stay. All destinations want more visitors, more of them to stay in hotels, and more of them to stay longer... London has lots of reasonably priced hotels and benefits from a rich variety of hotels and B&B organisations. But there is no doubt that we need more, if we aim to attract more visitors" [London Interview: 4].*

The quotations attached to the code *'lack of accommodation'* mainly revolved around two topics: the need for more budget hotels and the equally distributed serviced accommodation across the city. As the interviewees who referred to the need for more hotels, made it clear that they were aware of the new hotel developments, which were taking place in the city at the time, their remarks cannot be eliminated due to their lack of knowledge of the recent outgrowth of the accommodation sector. Among the 9 quotations, 6 of them were about a shortage of medium- and budget-priced hotels in London, while 4 of them referred to the condensation of existing hotels in Central London and the need to concentrate more on the outer boroughs when providing initiatives for new developments. Some of these quotations are as follows:

> *"Tourists should be encouraged to stay in different parts of London, not just in the centre. What we are short of is medium and budget-priced hotels. We have lots of top-priced hotels. We also need to improve the quality of budget hotels" [London Interview: 9].*

> *"It is a known fact that there is a shortage of hotels in London. There are some plans to increase the number of various types of hotels... At the moment, tourism occurs within the area of the Circle Line where all the attractions are and where 80-90% hotel establishments are too... There was not much to see and do in other places. But now that new tourist attractions are on the way, people can be encouraged to stay in outer districts" [London Interview: 1].*

6.4.1.2. The Accommodation Sector in Istanbul

As with London, Istanbul has had various types of accommodation outlets throughout its history ranging from historical inns to boarding houses and, more recently, from deluxe hotels to self-catering establishments. As explained in Chapter 4, while such outlets were concentrated in the Historic Peninsula during the Roman and Ottoman eras, various hotel establishments are now scattered across the city's borders. The increase in the number of accommodation establishments was especially evident after the 1980s, when Turkey entered a new liberalisation period, when the grounds for new tourism developments were made feasible with the provision of public grants and loans (Seekings, 1989; Erkip, 2000).

As Baki (1990) states, while the Ministry of Tourism was the main authority administrating the tourism projects applying for government incentives in the 1980s, the funds were available through the State Planning Organisation, which granted *'Investment Encouragement Certificates'* for those development projects with the potential to generate foreign exchange. As each project had to meet various size and value qualifications, the minimum capacity for hotel developments to gain a *'Tourism Certificate of Investment'* was determined as 100 beds. Qualifying projects were granted incentives such as exemption from corporate tax, construction tax, property tax *-i.e. up to five years-*, public loans with a long-term back-pay period, provision of public land at a low rental cost and, duty-free import of technical equipment and machinery.

As a result of the incentives, the number of establishments in the country tripled between 1983-92, during which over 2,400 new hotel outlets were completed and licensed by the Ministry of Tourism. The new establishments had created over 400,000 new bedspaces by 1992, which was four times more than the bedspace stock of the country in 1983 (TBYGM, 1998). Due to the qualification regulations for government incentives, the majority of the new developments were built as four- and five-star hotels and were mainly undertaken by international and national chain companies. The tourism policies of the 1980s, characterised by the provision of generous incentives, were not maintained in the 1990s owing to ongoing economic recession, when the increase in new hotel developments slowed down especially in the second half of the decade, reaching a total bedspace capacity of 550,000 in 1999 (TBYGM, 2000b).

Clearly, the incentives played an important role in introducing Turkey as a new holiday destination in the Mediterranean region, while the accommodation supply of the country was inflated in order to meet the anticipated growth in demand. The national tourism policies made it clear that the initial focus was on transforming small fishing towns into holiday resorts attracting mass tourism with a classical *'sea-sun-sand'* product combined with various heritage offers. There is no doubt that such policies succeeded in earning a place for Turkey alongside other Mediterranean tourist destinations on the international tourism map. As a cheap and unspoiled destination compared to its major rivals such as Spain and Greece, the number of international visitors to the country increased at a remarkable rate of 435% between 1983-92, with over 7 million international visitors in 1992 (TBYGM, 2000d).

While the tourism sector in Turkey is continuing to grow with over 9.5 million visitors in 2000 (ITD, 2000), the distribution of visitors by geographical regions shows that the Aegean and Mediterranean regions respectively accounted for 37% and 29% of all international visitor nights spent in accommodation establishments in 1999. The Marmara region, where Istanbul is located, followed with a share of 22% in the same year (TBYGM, 2000c). There is no doubt that, in comparison to the augmented effect of various holiday resorts spread along the western and southern coasts, Istanbul is the leading destination in the Marmara region. While the city attracted 90% of all international visitors to the region in 1999, 87% of the regional visitor nights were spent in the accommodation establishments of the city (TBYGM, 2000c).

Such a leading destination position of Istanbul saw many new hotel developments emerge in the city during the 1980s. The accommodation supply of the city expanded especially with the opening of new four- and five-star hotels in the 1990s. As Hall (1993) notes, the outgrowth of the accommodation establishments is especially evident after 1985, when new developments offered a wider choice of quality and price to potential visitors. While the construction of new developments took several years, it was noted in a recent report by the Istanbul Convention and Visitors Bureau (ICVB, 1999) that out of 20 four- and five-star hotel members of the bureau, only four opened before 1983 -*i.e. the start year of government incentives*-.

In addition to the opening of major international hotel chains' branches such as Hilton International, Hyatt Regency, Inter-Continental, Holiday Inn, Swissotel and the Ritz Carlton, special permission was also given for the renovation and transformation of two historic buildings as five-star hotels. The Ottoman Ciragan Palace and the old Sultanahment Prison were both restored and opened as the Ciragan Palace Kempinski Hotel and the Istanbul Four Seasons Hotel in the 1990s. While it is thought that the use of both buildings for tourism would help to conserve them and to stop further deterioration through effective administration and planning (Caglayan, 1995), the Ciragan Palace Kempinski Hotel is the only accommodation establishment in Turkey to become a member of the *'Leading Hotels of the World'* (ICVB, 1999).

As Table 6.14 demonstrates, the city has a total capacity of 79,675 bedspaces in a wide range of accommodation establishments. While some organisations are licensed by the Ministry of Tourism, there are also hotel outlets registered and regularly monitored by the Municipality of Istanbul. Both of the authorities undertake a uniform grading scheme based on a one- to five-star rating with exceptions in special categories such as guest houses and floating hotels. Although the uniform hotel grading scheme is practised throughout the country, it mainly concentrates on the physical aspects of a building -*i.e. the number of rooms, restaurants and cafes*-, and takes no account of the standard and quality of services provided by organisation. In fact, the establishments licensed by the Municipality are considered to offer minimum standards of comfort and, therefore, are mainly rated from one- to three-star hotels.

In spite of the excess number of establishments given operation licenses by the Municipality, they only account for a sixth of the city's total bedspace. In fact, the greatest share of the total capacity is held by four- and five-star hotels, which provide 48% of all beds available in the city. As explained above, this is partly because of the qualifications required for acquiring a *'tourism certificate of investment'* to make candidate projects eligible for government incentives. While the primary condition for such development projects was to be planned with a minimum number of 100 beds, the prevailing trend among investors has developed as to build hotel outlets serving to the upper-end of the market.

Table 6.14. Known Stock of Accommodation in Istanbul

<table>
<tr><th rowspan="2"></th><th colspan="2">Licensed by the Ministry of Tourism</th><th colspan="2">Licensed by the Municipality**</th></tr>
<tr><th>Est.</th><th>Beds</th><th>Est.</th><th>Beds</th></tr>
<tr><td>5*</td><td>37</td><td>24,969</td><td>-</td><td>-</td></tr>
<tr><td>4*</td><td>50</td><td>13,439</td><td>-</td><td>-</td></tr>
<tr><td>3*</td><td>89</td><td>12,558</td><td rowspan="3">535</td><td rowspan="3">12,887</td></tr>
<tr><td>2*</td><td>100</td><td>7,349</td></tr>
<tr><td>1*</td><td>21</td><td>1,514</td></tr>
<tr><td>Floating Hotels</td><td>2</td><td>924</td><td>-</td><td>-</td></tr>
<tr><td>Holiday Villages</td><td>1</td><td>514</td><td>-</td><td>-</td></tr>
<tr><td>Boarding Houses</td><td>3</td><td>151</td><td>32</td><td>512</td></tr>
<tr><td>Others*</td><td>36</td><td>4,858</td><td>-</td><td>-</td></tr>
<tr><td>TOTAL</td><td>339</td><td>66,276</td><td>567</td><td>13,399</td></tr>
</table>

* Other accommodation establishments include self-catering hotels, motels and guest houses.

** Although majority of the hotels licensed by the municipality are classified from 1 to 3 stars, the exact distribution of these hotels by category is unavailable.

Source: ITD (2000) and IOBC (2000).

The second reason for the dominance of four- and five-star hotels in Istanbul, is explained by the hotel-guest mix of the city, which stabilised at a ratio of 50% business visitors and 50% other tourists especially during the construction phase of many hotel developments in the early 1990s (Caglayan, 1995; Guvener, 1997). Therefore, it is not inappropriate to assume that the feasibility studies conducted prior to the development of each hotel project, were denoting an adequate demand for higher standard hotels in the city rather than budget-priced establishments. The limited number of four- and five-star hotels prior to the 1980s also justifies the above argument and explains the increasing interest shown by the international hotel chains to open their branches in the city. In fact, it was only after the 1980s that Istanbul strengthened its position as an international trade and business centre owing to the opening of national economy to international trade with a more stabilised political standing, and became a favourable destination for large hotel establishments (Sonmez, 1996a). As Table 6.15 displays, four- and five-star hotel outlets continue to achieve a remarkable share from the hotel-guest market, as they accommodated 54% of all visitors who stayed in accommodation establishments licensed by the Ministry of Tourism in 1999.

When the existing accommodation capacity of Istanbul is compared with the demand for bedspaces in 1999, it can be argued that there is a surplus of over 15,000 bedspaces in the city (*see Appendix 16*). Since accurate and regular statistical data on domestic tourism are non-existent, such estimations are based on an estimated number of domestic visitors calculated according to the guest mixes of all accommodation establishments licensed either by the Ministry of Tourism or by the Municipality of Istanbul (TBGYM, 2000a; 2000c). While every effort was made to achieve an accurate figure for domestic visitors, the estimated number still carries a risk of misrepresenting the actual visitors who stayed in accommodation establishments in 1999. Besides, it is a known fact that the number of international visitors decreased by 27% in 1999 compared to over 2.3 million visitors in 1998, mainly due to the Izmit earthquake. Hence, the surplus of bedspace estimated according to the tourism statistics in 1999, cannot be interpreted as a long-term fact, but as a temporary outcome of a slow-year effect. In fact, the increasing number of international visitors in 2000, proves that the sector did not suffer from the negative effects of the earthquake for too long, as the city managed to reach a level of over 2.3 million international visitors just a year after the catastrophe.

Table 6.15. The Distribution of Guests and Nights Spent in Istanbul by Type of Establishment in 1999*

Type of Establishment	*Number of Guests*			*Nights Spent*		
	International	*Domestic*	*Total*	*International*	*Domestic*	*Total*
5* Hotels	539,729	367,568	**907,297**	1,139,380	625,506	**1,764,886**
4* Hotels	241,470	197,874	**439,344**	578,488	380,869	**959,357**
3* Hotels	238,708	172,763	**411,471**	583,505	313,836	**897,341**
2* Hotels	210,142	235,160	**445,302**	502,277	389,841	**892,118**
1* Hotels	49,081	49,789	**98,870**	106,187	88,179	**194,366**
Floating Hotels	22,915	45,203	**68,118**	49,149	79,148	**128,297**
Self-Catering	1,210	-	**1,210**	2,902	-	**2,902**
Boarding House	7,429	1,440	**8,869**	11,008	2,222	**13,230**
Holiday Village	2,400	17,575	**19,975**	9,001	25,884	**34,885**
Motels	1,049	2,695	**3,745**	2,407	3,722	**6,129**
Others	51,335	44,559	**95,894**	121,002	102,128	**223,130**
TOTAL	1,365,468	1,134,626	**2,500,094**	3,105,306	2,011,335	**5,116,641**

* The data only include the accommodation establishments licensed by the Ministry of Tourism.

Source: TBYGM (2000a)

Given such information, it is still difficult to argue that Istanbul needs more hotel rooms, as the average occupancy rate in the city is lower than many other urban destinations in Europe. Compared to the average room occupancy rate of London, which was 80% in 2000, the accommodation establishments of Istanbul operated at an average rate of 32% in 1999 (TBYGM, 2000a). In fact, in the same year, the average room occupancy rate of the establishments, which were licensed by the Municipality of Istanbul, was as low as 18.5% (TBYGM, 2000c). Therefore, one can suggest that if a demand for more bedspace occurs in line with a growth in visitor numbers, the initial efforts should be to utilise the unused capacity of the existing accommodation stock more effectively, before new hotel developments are built. Although the city is considered a developing tourist destination and is assumed to attract increasing numbers of visitors given no interference by internal and external factors, the low room occupancy rate suggests that part of a surplus in visitor numbers could be accommodated by the existing stock in the short-term. If long-term consistent growth is sustained, then the demand for more rooms should be allowed for accordingly.

In fact, the declining growth of new hotel developments since 1995, can be interpreted as a reaction of the private sector to the saturated supply of accommodation. While there is no doubt that the cuts to and restrictions on public grants and incentives played an important role in such a decline, the share of the accommodation sector among overall urban investment projects has been reported to have decreased from 2.45% in 1995 to 0.17% in 1998 (TCIV, 2000). In contrast to 15,000 rooms added to the total accommodation stock by new four- and five-star hotels in the first three years of the 1990s, the overall increase in hotel rooms in all types of accommodation establishments was about 7,000 rooms between 1995 and 2000 (Sonmez, 1996a; ITD, 2000).

As a recent report by the Istanbul Governor's Office states, despite its importance as an income earner and its great potential to develop further, the accommodation sector is not currently placed top of the priority list for government initiatives (TCIV, 2000). The only sectors to continue to benefit from public money are health, housing and education, but a growth in the accommodation sector as experienced in the 1990s may be repeated in the short-term, if Istanbul succeeds in winning the bid for any of the forthcoming summer Olympic Games. The bidding proposals prepared for the 2008 Olympic Games by the Istanbul Olympic Bidding Committee (IOBC) shows that, in order to accommodate an excess number of visitors during the event, the city would need at least another 6,656 rooms in 44 outlets, most of which to be built as four- and five-star hotels (IOBC, 2000).

Despite its current status as a developing destination, the interview results of this research indicate that Istanbul does not suffer from a shortage of hotel rooms given the existing demand for serviced accommodation. In comparison to 9 quotations attached to the code *'lack of accommodation'* in London, only two quotations were linked to the same code during the analysis of the Istanbul interviews. The quotations concerning the accommodation sector in general were assembled under the code *'accommodation'* and consisted of various views on the sector. The increase in the numbers of four- and five-star hotels during the last two decades and the adequate number of hotel rooms in the city were mentioned most. 7 out of 10 quotations linked to the code *'accommodation'* were about up-market hotels and their importance for business and congress tourism. Such hotels, which have conference rooms and halls, are mentioned to be of sufficient numbers and to provide good quality service. They are also considered to be vital components of the sector in strengthening the competitiveness of Istanbul as a business and congress destination.

The 4 quotations listed under the code *'accommodation'* included the word *'adequate'* or its synonyms with regard to the existing accommodation capacity of Istanbul. The only criticisms of the accommodation sector were concerned on the low average occupancy rates and the relatively poorer quality of services provided by the establishments licensed by the Greater Istanbul Municipality in comparison to those licensed by the Ministry of Tourism. While the low average occupancy rate was mentioned by three interviewees, two interviewees expressed concern about the service quality in the accommodation sector. Two of the quotations are as follows:

> *" We have a sufficient number of hotels... Within the very heart of the city, we have 16 five-star hotels with a 3,400 room capacity. They have conference and banquet halls, skilled personnel and technical equipment, which enable them to host all kinds of meetings, exhibitions and conferences" [Istanbul Interview: 2].*

> *"Istanbul would only need more hotels, if the demand for hotel rooms increases further... For the time being, a low occupancy rate remains as the major problem for many hotel organisations. In many cases, they drop their prices to attract more guests in order to balance visitor numbers between shoulder and peak months" [Istanbul Interview: 13].*

The two quotations on the shortage of accommodation emphasised two different issues. The first one was a suggestion to expand the accommodation stock of the city by transforming second-home properties into guesthouses. The second regarded the need to extend the current stock in order to prepare the city for the Olympic Games:

> *"Istanbul should be aiming to attract more visitors... Along the coast of the Black Sea and Marmara Sea, there are hundreds of summer houses, which are*

only used for a couple of months a year by their owners. For the rest of the year, they are deserted. With a special scheme supported by government initiatives, they could be transformed into guesthouses with rooms rented out to visitors" [Istanbul Interview: 9].

"Istanbul is now bidding to host the Summer Olympic Games... Where are we going to accommodate the visitors who would be travelling to the city in great numbers within a period of fifteen days? How are we going to provide transportation opportunities for those visitors? Before the time comes, we first need to accomplish certain goals like expanding the accommodation stock and improving public transportation" [Istanbul Interview: 4].

To conclude, the existing literature and the primary data collected for this research suggest that the accommodation stock of Istanbul meets the current demand and does not represent any threat to the physical capacity of the city. While a significant increase in hotel beds since the 1980s has prepared the grounds for the city to develop as a tourist destination, an immense growth in tourism development has not been achieved in the provision of appropriate urban infrastructure facilities across the city.

6.4.1.3. The Accommodation Sector in Amsterdam

Unlike an outburst of new hotel developments in Istanbul during the early 1990s, the accommodation sector of Amsterdam has not experienced a similar growth in the same decade. While the growth of tourism dates as early as the 1960s when the city had already established itself as a popular tourist destination especially in the European market, the remarkable increase in overnight stays by international visitors caused the expansion of accommodation establishments especially during the 1980s. The popularity of Amsterdam among young visitors and the hotel guest mix -*i.e. leisure tourists outnumbering business visitors in these early years-*, resulted in many traditional Amsterdam houses located by canal-sides being transformed into budget-priced establishments (Dienst Ruimtelijke Ordening, 1994). Such establishments were followed by an increase in four and five-star hotel outlets toward the beginning of the 1990s (McGuffie, 1992).

While the recently stabilised accommodation sector can be interpreted as a reaction of private sector investors to the declining growth trend of tourism during the last decade, the historic urban architecture, which is one of the major attractions of the city, together with the compactness of the city do not provide much opportunity for new hotels to be built within the city centre. While there are clearly some exceptions to the planning permission granted to new developments and extensions to existing hotel outlets within the city centre, planning restrictions and regulations in the historic city have caused outer districts to emerge as hotel zones. The area near the airport Schiphol and the southern outskirts of the city where the World Trade Centre, RAI Exhibition and Conference Centre and the Amsterdam Arena are located, have been attracting up-market hotel investments, which mainly aim at attracting business visitors. In addition to these areas, revitalisation schemes run under the *'IJ Waterfront Project'* include new luxury hotels to be built in the northern axis of the city bordered by the River IJ.

As Table 6.16 shows, the accommodation sector in Amsterdam, as in London and Istanbul, is dominated by four- and five- star hotels, which account for nearly half of the total number of rooms in serviced accommodation and 44% of the total bedspace of the city. The table also shows that change in the number of accommodation establishments has been minimal over the four-year period, while the total bedspace capacity increased by 7% reaching to over 34,000 beds in a variety of establishments in 1999. Since the number of establishments did not show a similar rate of growth during the period concerned, the change in the total stock of rooms and beds is assumed to be a result of extension and renewal projects. In fact, while the total number of 3-star hotels dropped from 66 in 1996 to 65 in 1999, the establishments in this category added further 332 rooms to the total stock with nearly an 8% increase in their bedspace.

Table 6.16. Known Stock of Accommodation in Amsterdam

Establishments	*1996*	*1997*	*1998*	*1999*
5* Hotels	16	16	16	17
4* Hotels	27	27	27	27
3* Hotels	66	66	65	65
Others*	208	209	201	211
TOTAL	317	318	309	320
Rooms				
5* Hotels	4,080	4,080	4,065	4,257
4* Hotels	3,540	3,610	3,618	3,574
3* Hotels	3,870	3,830	4,052	4,202
Others*	4,240	4,225	3,815	4,125
TOTAL	15,730	15,745	15,550	16,158
Beds				
5* Hotels	7,100	7,100	7,598	7,937
4* Hotels	7,030	7,140	7,203	7,067
3* Hotels	7,910	7,840	8,243	8,519
Others*	9,830	10,130	10,448	10,646
TOTAL	31,870	32,210	33,532	34,139

* Others include 2 and 1* hotels, youth hostels and other unclassified accommodation establishments other than campsites.

***Source*:** VVV (2001a).

As in Turkey, a unified hotel classification system based on star-grading has been used throughout the Netherlands since 1986. Hotel operations are granted from one- to five-stars according to the so-called *'Benelux Star System'* and are monitored every other year in order to appraise whether they keep their facilities up to the level expected of their category (VVV, 1994). Unfortunately, while the classification relies on the diversity of amenities and facilities offered by each operation, the service quality of establishments is neglected in Amsterdam. In other words, the classification only reflects quantitative measures considered looking into the number of restaurants, lifts, rooms and leisure facilities such as swimming pool, sauna and gym.

While hotel prices are clearly dependent on the number of stars, the statistical information gathered by the Amsterdam Tourist Bureau (VVV) shows that each accommodation category attained an almost equal share of the staying visitor market in 1999. According to such statistics, while the share of four- and five-star hotels was 22% each in 1999, 26% of all guests in serviced accommodation stayed in three-star hotels. The remaining 30% were shared by the rest of the budget-priced accommodation consisting of two- and one-star hotels, youth hostels and boarding houses. When compared to the market share in 1996, it can be seen that while the share of three- and four-star hotels increased in the four-year period, five-star and budget-priced establishments lost their share by 3% and 6% respectively (*see Table 6.17*).

Table 6.17. Distribution of Guests According to the Type of Accommodation in Amsterdam

	1996	1999
5* Hotels	25%	22%
4* Hotels	17%	22%
3* Hotels	22%	26%
Others*	36%	30%
TOTAL	100%	100%

*Others: Two- and one-star hotels, youth hostels and other unclassified accommodation operations.

Source: VVV (2000a and 2001a).

Considering that Amsterdam is still a popular destination among young visitors especially in the European market, the higher share of budget priced accommodation in the market of staying visitors is not surprising. Nevertheless, upward moving growth trend of up-market and deluxe hotels is stated as crucial to strengthen the city's image as a conference and business destination, as 55% of all international congresses and conferences were held in four- and five-star hotels in 1997 (Amsterdam Congres Bureau, 1997). Lower-range and budget-priced hotels, meantime, continue to attract visitors from the major market segments such as Britain, France, Germany and the United States and mainly depend on leisure holiday, short-stay and weekend break markets (VVV, 2001a).

When the known stock of rooms and bedspace in Amsterdam is compared with the demand for accommodation in 2000, it can be seen that there is a surplus of 15,475 beds in the city (*see Appendix 17*). In other words, the thresholds of the city's bedspace capacity would only be approached, if the total number of visitors exceeds 5 million visitors a year. This would mean a further 66% increase in demand to be accommodated effectively by the existing establishments in the city, as the total visitor numbers were just over 3 million in 2000. Given that the forecasted annual growth trend in visitor numbers has been on average 3% since the mid-1990s, a shortage of bedspace is not a reality for the tourism sector at least in the near future (VVV, 2000a and 2001a).

Similarly, a surplus of over 5,800 rooms also supports the above argument. What is distinctive to Amsterdam, however, is that the excess number of rooms does not equate an average ratio of 2 beds for each room when compared with the surplus of bedspace. The existing accommodation stock has an average of 2.1 beds for each room in the city. While the estimated need for bedspace and rooms *-i.e. 18,664 beds /10,302 rooms* - indicates the same ratio to be 1.8, it increases to a level as high as 2.6 when the surpluses of both accommodation units *-i.e. 15,475 beds/ 5,856 rooms-* are compared. This is mainly because of the budget-priced hotels and youth hostels in Amsterdam, which provide more beds in a single room than high class hotel operations. In fact, as Table 6.16 shows, nearly 1 out of every 3 beds is provided by the lower-end establishments in Amsterdam, while the rooms in these establishments account for just over 25% of the total room capacity of the city.

Another significant indicator of carrying capacity in reference to the accommodation sector is clearly the average occupancy rates achieved by hotel organisations. The average room occupancy rates in Amsterdam have shown an upward moving trend since the early 1990s. Considering that the overall growth of the tourism sector has not been promising owing to a stable and low-rate increase in visitor numbers and the remarkable surplus of bedspace in the city, the high occupancy rates are surprising and almost contradict the argument that the city does not need further rooms. However, the increase in the average occupancy rates can be justified by the slowed down investment in new hotel developments especially in the second half of the 1990s. Therefore, any increase in visitor arrivals is absorbed mostly by existing accommodation establishments (VVV, 2001a).

The picture drawn by the interview results of this research also shows a consensus among interviewees about the accommodation capacity of Amsterdam. Nine quotations attached to the code *'accommodation'* included various comments on the accommodation sector and concluded with matching views that the city does not need further hotel rooms, as there has not been a notable increase in visitor numbers in the recent past. One interviewee stated that a need for more rooms should only be projected, if well-planned growth of tourism is supported by government initiatives in the near future. Two interviewees mentioned new luxury hotel developments along the River IJ. Two interviewees referred to an equal distribution of accommodation establishments between budget-priced and high-class hotels, while only concern raised by two interviewees was regarding the poor quality of service offered by the lower-range operations. Examples of such quotations include the following:

> *"I do not think that we need more hotels in Amsterdam right now. For the demand we have, the number of hotels has been satisfactory... Besides, there are plans to build new five-star hotels in the IJ Development area" [Amsterdam Interview: 7].*

> *"There are enough hotel outlets in Amsterdam, especially in the centre. There are both cheap budget hotels and youth hostels, and luxurious five-star ones... If one suggests that we should have more hotels, then we need to look outside the city centre for new locations... Local authorities should decide which new areas can be promoted as new tourist zones and where new hotels can be built. The Harbour area is chosen as one of such new localities. Clearly there is not enough space in the centre" [Amsterdam Interview: 8].*

> *"I do not think that we suffer from a shortage of hotel rooms. Maybe we should focus on the service quality provided by hotels especially in the lower-end" [Amsterdam Interview: 10].*

Despite such positive remarks about the sector, there were also 4 quotations attached to the code titled *'lack of accommodation'*. However, only one interviewee clearly stated that there was a shortage of hotels in the city, while the other three quotations associated the need for more hotel rooms with other influential factors such as the potential growth of tourism in the future and the spread of visitors across the year and the city. Attention was also drawn to the need to increase accommodation stock by proposing new establishments serving both ends of the market. The suggestion was made to plan new hotel developments according to target markets identified by the relevant authorities and the expectations of such market segments from accommodation services. Examples of such quotations are as follows:

> *"There is a shortage of hotel rooms in Amsterdam, as in any other city. However, Amsterdam has not shown that it will continue to attract more visitors. Maybe it has not lost its share in the market, but it has not grown, as one would want it to. Therefore, you need to be sure before you build more hotels. You need to rely on some systematic forecasts to see whether there will be an increase (in visitor numbers) and whether new visitors would use the new hotel rooms" [Amsterdam Interview: 1].*

> *"Do we need more hotels? If tourism grows, then we would definitely need more hotels in the next five years. We would need more hotels at different ends of the market. At the moment, there is a huge gap between the prices of*

various hotel organisations. Some are incredibly cheap, the others are too expensive. This needs to be balanced" [Amsterdam Interview: 3].

"We do have seasonal fluctuations in visitor arrivals. In the low season, rooms are empty. Attracting business travellers helps to spread hotel guests across the seasons and to achieve stable occupancy rates. Meantime, weekends are always busy. If we can succeed in attracting balanced tourist arrivals throughout the year, then we will need more hotels" [Amsterdam Interview: 11].

To conclude, the accommodation sector in Amsterdam, which accounts for the 16% of overall visitor expenditure in the city with a sum of NLG 1.1 billion in 1999 (VVV, 1999b), seems to have an efficient stock of rooms and beds for the current demand by overnight staying visitors. The literature review and the interview results both suggest that before any more hotels are proposed by private sector investors and are given planning permission by the local authorities, tourism, which has shown a stagnant growth rate especially during the last decade, should first demonstrate a constant and consistent increase in visitor arrivals.

While the carrying capacity calculations show that there is a remarkable surplus of rooms and bedspace in the city, the local authorities have been rather reluctant to promote and plan further tourism investment in the city (*see Section 6.1.3*). Since the analysis of the accommodation sector only provides a partial insight into the physical carrying capacity limits, this chapter continues with other capacity determinants including tourist zones and seasonality, while the issues related to tourism management and marketing will be dealt further in detail with in the following chapters.

6.4.2. Tourist Zones and Crowding

The thresholds of physical carrying capacity cannot be measured solely by comparing the demand for bedspace with the existing accommodation stock in a destination, but are also determined by the capacity limits of all other services and facilities offered as components of the overall product package to visitors. In this respect, an ideal physical carrying capacity analysis should investigate various supply-side elements such as museums, restaurants, cafes, shopping centres, conference halls and transportation facilities and should compare their capacity with the demand for such services by both visitors and locals through an application of systematic and detailed calculations.

While, in theory, such a thorough analysis would be presumed to produce meaningful and appropriate results with regard to the carrying capacity of a destination, it is rather difficult, if not impossible, to conduct in practice. In addition to the difficulty of identifying a cluster of products and services available either for purchase or for the use of visitors, it is evident that not all tourist products and services appeal to comparable volumes of visitors. While many landmark tourist attractions are visited in large numbers of visitors especially during peak-seasons, some remote and less-known attractions in the same destination may suffer from a lack of attention in spite of their potential attractiveness and capacity to absorb large number of visitors.

Besides, as mentioned in Section 2.6.7, different market segments can create different product packages from the same set of product and service offers available in a destination according to their specific expectations and wants. For example, the product package created by a visitor on a shopping trip would be different than the one constructed by a short-break visitor. However, when it comes to visiting the major landmarks and attractions of a destination, there may be overlaps in the itineraries of different visitor types. In spite of their initial intention to concentrate on certain products and services, the well-known and unique attractions of the destination would attract different market segments to the same tourist spots at some point in their stay. This is why many tourism organisations and service providers try to locate their businesses in the close vicinity of each other and near major tourist spots in order to gain economic benefits induced by a large number of visitors.

While it is undeniable that the foremost characteristic of cities is that they are geographically large settlements, they are often the agglomerations of smaller-scale zones and districts, which are invisibly bordered according to their specific functions and mechanisms. Many cities have business and office districts, residential areas, industrial estates and recreational sites within their greater city boundaries. They also have distinctive central, so-called inner-city, areas, which are often characterised by major transport connection points and stations, shopping areas and the offices of public authorities such as municipality or a parliament in the case of a capital city. A city centre can also be distinguished by the concentration of major heritage sites and buildings within a particular neighbourhood area, which, to a certain extent, provides evidence of the importance of the area throughout the city's history.

Owing to such characteristics, such inner-city locations are in many cases also the major tourist zones of urban destinations, where visitors and tourism organisations can be found in large number. In addition to many accommodation establishments, city centres are enriched with numerous entertainment and recreation opportunities, a variety of cultural activities and restaurants, cafés and shops. They are the meeting point not only for visitors, but also for locals, which causes condensed human activity within their limited boundaries.

Clearly, an inner-city area does not always have to be a major tourist zone or the only one in a city destination. In urban areas, several tourist zones can be identified according to the concentration of primary and secondary components of the tourist product package in certain localities. Tourist zones and the concentration of visitor flows in such zones give a clear indication as to the attitudes and behaviour of visitors as well as to the negative effects of tourism on the physical and social environment of the destination.

Therefore, this research puts the emphasis on the identification of the tourist zones of the case study cities. Several determinant factors such as the location of most visited attractions, shopping areas and streets, the concentration of accommodation establishments in certain districts and leading connection points such as gateway stations and terminals, were investigated and placed on city maps in order to understand the connection, accessibility and adjacency of tourist spots, attractions and organisations in each city. In addition to the existing literature on city districts and their importance for distinctive urban functions, various studies on tourism in the selected cities such as shopping tourism, heritage tourism and culture tourism, have also provided notable insight into the areas, which attract different market segments. The data gathered from secondary sources are compared with the primary data, before final conclusions were drawn regarding the possible threats to the physical carrying capacity of each city as a tourist destination and the distribution and popularity of tourist zones within their urban borders.

6.4.2.1. Amsterdam: An Open-Air City Museum

As mentioned earlier, one of the major strengths of Amsterdam as a city destination is its compactness. Tourist products of the city are not scattered on a large geographical scale, but are mainly consolidated within the city centre and along the canals. In spite of the rich variety of tourist attractions and facilities, such spatial clustering of tourist product components makes the city centre the dominant, if not the only, tourist zone in comparison to the outer districts. As a result, while the majority of visitors explore the city either on foot or by bicycle, their movement from one attraction to another is easy.

The compact urban morphology of Amsterdam is so unique that several authors describe the tourist offer of the city as *'an urban theme-park'* or *'an open-air museum'* (O'Loughlin, 1992; Fainstein, 1996; Nijman, 1996; Claval, 1993). Fainstein (1996) states that the disparate urban functions are almost patently shared between the inner-city as an entertainment and cultural core, and the outer districts as business and residential zones. Nijman (1996), meantime, likens the inner-city to a theme park, where the *'theme'* is sex and drugs and customers are mainly young backpackers. As the author further notes, although there is no fence around the *'park'*, no entry fee and no main entrance or exit points, the Central Station can be regarded as a gateway to the park, where visitors pay per consumption. Since the *'theme'* of the park is chosen as *'sex* *and drugs'* according to the widely acknowledged image among the potential customers of this spontaneously evolved urban park, the author also lists various *'theme-related'* attractions ranging from coffee shops to the Red Light District and from the Sex Museum to the Cannabis Connoisseurs Club. The author concludes with an argument that the central tourist zone of Amsterdam is almost the size of the planned theme parks of the United States, and most of the alternative tourist offers outside *'the park'* are scattered within a short-distance reach.

Visitors clearly gain benefits from such compactness, as it is, to a certain extent, easier to make plans to cover as many attractions as possible within a limited period of time. Urban marketers and planners, meantime, take advantage of the central tourist zone when managing visitor flows especially during peak-seasons. The authorities responsible for the maintenance of urban infrastructure can take precautions in the areas, where and when the condensation of visitors is most likely to occur. In fact, as Nijman notes, visitors, who arrive at the Central Station, are likely to follow a straight-line route, and are mostly found in large numbers around the two major squares; the Dam Square and Leidseplein. Although such a straight-line flow of visitors puts certain areas under pressure in terms of overcrowding, it should, theoretically, help service providers to foresee the likely effects of congestion in a constricted area.

One of the major bottlenecks caused by condensed visitor flows in central tourist zones is the excessive use of urban infrastructure by large populations in high seasons. However, Amsterdam is considered to meet the demand created by visitors for services such as transportation effectively (*see the strengths of Amsterdam in Section 6.3.1*). Overall, the city is found to provide adequate infrastructure services in terms of both quantity and quality in comparison to the other two case study cities. While there is no doubt that national welfare plays an important role in the adequate provision of public services, the maintenance and upgrading of such services is arguably much easier in a compact city like Amsterdam than a geographically widespread metropolitan area. For example, since most visitors explore Amsterdam either on foot or by bicycle, one can argue that the demand for transportation is not as high as in London, where it might be time-consuming for a short-break visitor to access even some centrally located attractions on foot.

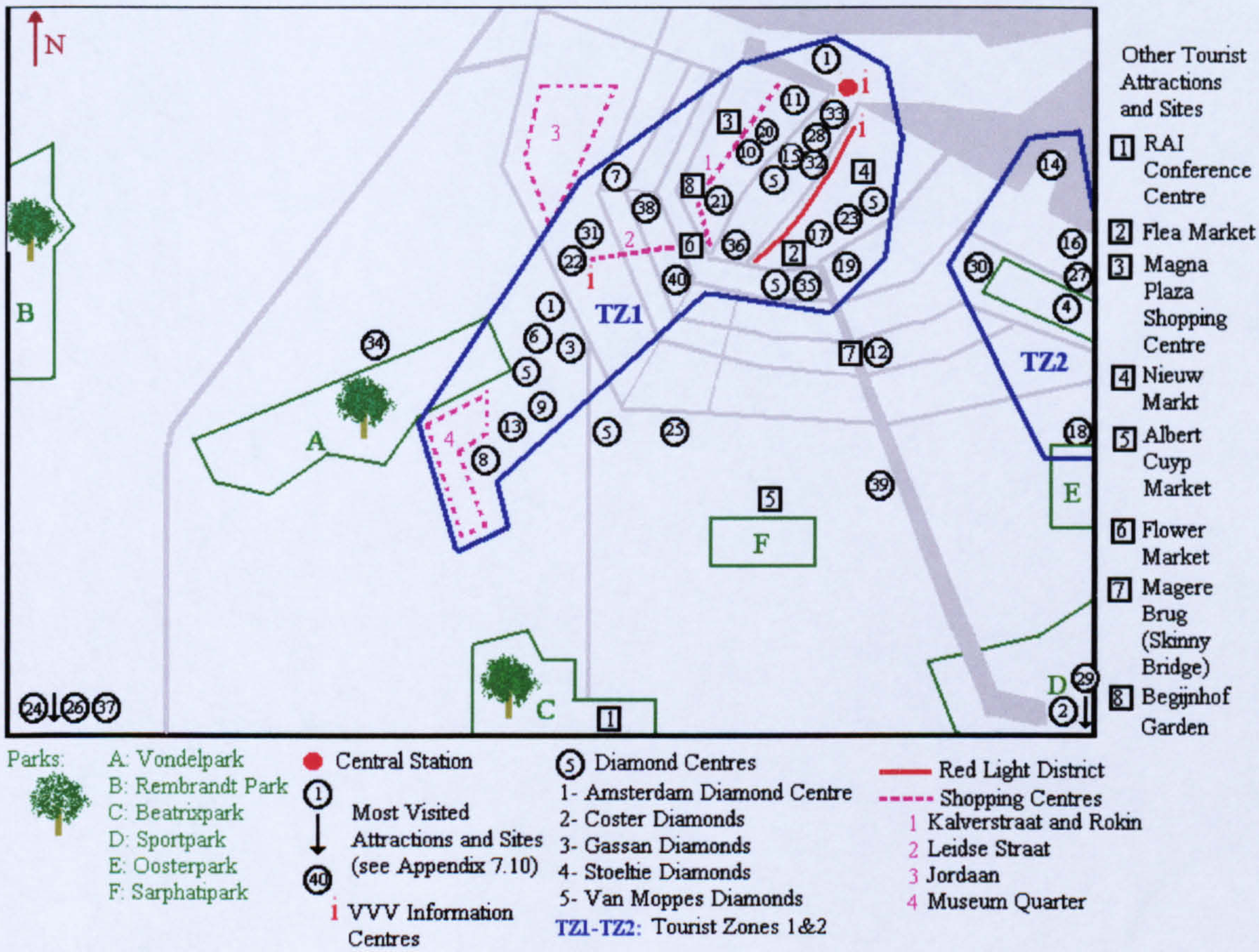
In the case of Amsterdam, however, the major bottleneck caused by a central tourist zone and the *'open-air museum'* quality of the city's tourist offer is argued to be the imbalance between the populations of residents and visitors in favour of the last especially during high-seasons (O'Loughlin, 1992). Although the population of Greater Amsterdam is 1.3 million, the city centre accommodates about 725,000 residents (Kahn and Van der Plas, 1999; VVV, 1998). Thus, the estimated number of international visitors alone *-i.e. 2.1 million in 2000-* suggests that there are three visitors for each resident a year in the city centre. Considering that Amsterdam is also a popular destination for the domestic market, the ratio can rise up to 5-6 visitors a resident in the high season. Such a disproportionate balance was shown to be one of the main reasons why the city is considered to resemble an urban open-air museum. The city, whose streets are packed with more visitors than locals, is considered to build its economy heavily on tourism and to maintain its urban framework in a way to appeal to its potential visitors (O'Loughlin, 1992). O'Loughlin further notes that the physical appearance of major tourist areas is so commercialised with global signs, boards and symbols that it presents a *'tacky'* image of an enterprise destination.

In the light of the above information, the whole inner-city area of Amsterdam can be acknowledged to be a compact tourist zone. However, in order further to investigate the concept of tourist zones and crowding, the major tourist attractions and sites of the city are placed on a map for this research (*see Figure 6.19*). Along with the Central Station, which is the entrance point to *'the park'*, the most visited forty attractions and sites, major shopping streets, the Red Light District and green areas are shown in the figure. The reasons for the inclusion of the most visited attractions as listed by the Amsterdam Tourist Bureau (VVV, 2000b) are to narrow down the full coverage of all sorts of tourist products and services available in the tourist product package, and to distinguish where the concentration of visitors occur in the city (*for the list of the most visited attractions, see Appendix 18*). Among these attractions, canal boat tours and diamond centres are placed more than once, as the visitor figures of these attractions indicate an accumulated total acquired by miscellaneous organisations. While the main boarding points near the Central Station and the Rijksmuseum are chosen to represent the canal boat tours, five different diamond centres are all shown individually.

The most visited attractions listed by the VVV only include the paid-attractions and -sites where it is easier to monitor and count visitors according to ticket sales. However, there are clearly other sites and attractions, for which there is no entrance fee, but are just as popular. Therefore, in order to list as many sites and attractions as possible, existing literature on tourism in Amsterdam and various tourist maps, brochures and guides were reviewed to pinpoint other areas where visitors are recommended to pay a visit and are expected to be found in large number.

As a result, along with the major green areas and parks of the city, shopping streets, street markets, the major shopping centre -*i.e. Magna Plaza Shopping Centre*-, the Red Light District, RAI Conference Centre and the Skinny Bridge are displayed in Figure 6.19. Since one of the major image constituents of Amsterdam is the Red Light District, the coverage of the area in this analysis was crucial. The RAI Conference Centre, on the other hand, together with the Amsterdam Arena, are considered to be the major attractions outside the city core, both of which enhance the status of the city as a business and conference destination. Finally, it is very unlikely for any tourist brochure or map of the city not to include a picture of the Skinny Bridge, which is mainly used to present Amsterdam's image as a city built on canals.

Figure 6.19. Tourist Zones in Amsterdam



As the figure displays, the majority of tourist attractions and sites of Amsterdam are in the city core and are located in close proximity to each other. Among the most visited attractions and sites, only five attractions numbered 2, 24, 26, 29 and 37 are situated in the hinterlands. Therefore, an attempt to encircle nearby attractions and sites within tourist zones results in an imbalance between the inner-city (Tourist Zone 1- TZ1) embracing major landmarks such as the Rijksmuseum and the Van Gogh Museum and the outer districts, which have a supply of very few attractions. The inner-city tourist zone stretches on a straight line from the Central Station at one end to the Museum Quarter on the other. The area covers almost two thirds of the most visited forty attractions, the Red Light District and three of the major shopping areas.

The only other area, where a sufficient number of tourist attractions is thought to present the characteristics of a potential tourist zone, is Tourist Zone 2 (TZ2). This zone, which mainly derives from the spatial clustering of attractions located in the West End of Amsterdam, has witnessed the major tourism development of recent years supported by public incentives; the New Metropolis Technology Centre (Dahles 1998). The interactive science museum opened in

1997. The site of the museum was especially chosen along the River IJ and close to other attractions such as Artis Zoo, the Tropical Museum and the Maritime Museum, in order to divert visitor flows from the city centre toward this particular quarter. The area is a passageway joining the inner-city with South Amsterdam, which the local authorities have proposed to develop as a shopping and business tourism centre (VVV, 2000a). Therefore, the area bordered as Tourist Zone 2 (TZ2) can be regarded as an initial opening of the central tourist zone to the Southern outskirts, although the attractions in TZ2 are still in close proximity to the attractions of the core.

Such a simplistic mapping of tourist attractions is helpful in providing insight into visitor movements within an urban space, which embraces primary and secondary product elements of a tourist product cluster. However, the spatial clustering of tourist attractions and facilities can be further examined by assessing the functional characteristics of each tourist zone identified by the localities of tourism organisations and service providers serving particular market segments. For instance, as Figure 6.19 shows, there are four major shopping centres in Amsterdam, each of which can be considered *'a shopping tourism zone'*. In the same way, the concentration of accommodation establishments in the centre or the emergence of conference and exhibition centres in the outskirts, would suggest that different urban zones can be identified as *'hotel zones'* or *'business tourism zones'* according to the dominance of particular tourism organisations within certain neighbourhood areas.

In the literature, there are several studies examining the spatial pattern and clustering of tourist products and offers in Amsterdam (Jansen-Verbeke and Van de Wiel, 1995; Jansen 1989; Claval, 1993; Jansen-Verbeke, 1998; Ashworth et al., 1988). Jansen-Verbeke and Van de Wiel (1995) investigate the tourism product cluster of Amsterdam and list the primary and secondary constituents of the cluster. While the authors regard the historic, cultural and recreation opportunities of the city as primary product elements, shopping, catering, accommodation, congress and conventional facilities and the Red Light District are grouped as secondary products (*see Table 6.18*).

All the studies reviewing the connection between urban space and shopping tourism focus on the importance of developing shopping centres near primary tourist products such as heritage and cultural tourism offers (Jansen-Verbeke, 1991 and 1998; Jansen, 1989). The shopping streets and markets of Amsterdam examined by such studies include the ones shown in Figure 6.19 -*i.e. Kalverstraat, Jordaan, Albert Cuyp Market etc*-. Therefore, it can be argued that the shopping opportunities of Amsterdam are interwoven with other tourism offers of the historic city centre and are situated alongside other popular tourist sites and attractions within Tourist Zone 1. The only exceptions are Jordaan and the Albert Cuyp Market. Jordaan, an inner-city district, has been recently promoted as a shopping quarter of Amsterdam and embraces various retail outlets and specialised stores ranging from antique shops to bric-a-brac displays. Although there are no other major tourist attractions and sites apart from catering establishments and street cafés in the district, it is in walking distance from the tourism offers of the centre. Albert Cuyp Market is especially popular among domestic visitors and locals, and is also in close proximity to the core (VVV, 2001b).

Table 6.18. The Tourist Product of Amsterdam

Core Elements		
1 Historical	*2 Cultural*	*3 Outdoor recreation*
Built environment	Museums	Canals and boat trips
Urban morphology and architecture	Cultural programmes	Urban parks and zoo
Water and canals	Exhibitions	Botanical gardens
Historical buildings and monuments	Cultural ambience	
Churches - palaces	Theatre - concert halls	
Urban history	Typical life style	
Historical associations	Libraries	
Folklore	Ethnic diversity	
Cultural identity	Events and festivals	
Urban scenery		
Secondary elements		
Shopping facilities and street-markets,		
Catering sector - pavement cafes, bars, coffee shops, restaurants		
Hotels, congress and convention facilities		
Entertainment and the red light district		

Source: Jansen Verbeke and Van de Wiel (1995).

The Red Light District, which is arguably the most significant *'sex and drug'* component of *'the theme park'*, is in the very heart of the city centre. The area is an excellent example of a functional clustering of tourist attractions and services, as the boundaries of the area are exceptionally defined and confined with a few streets, where the majority of the establishments operating in the sex trade are located. In contrast to similar districts in many other metropolitan areas, the Red Light District of Amsterdam is a tourist attraction on its own. As Ashworth et al. (1988) emphasise, sex and tourism have developed a strong relationship in the city, and paying a visit to the area and watching the prostitutes in the *'ground floor windows'* of brothels have taken their place among the major tourist attractions of the city.

The authors further add that the major characteristic of the area from the perspective of a tourist zone is that a high proportion of visitors is non-local. Thus, any potential problems caused by concentration and overcrowding would require strategic visitor management schemes in order to divert visitors to other parts of the city. However, since the tendency among international visitors is to combine a visit to the Red Light District with other centrally located attractions and facilities, and to wander around the area, overcrowding is yet to appear as a threat for the effective maintenance of the district.

As discussed in Section 6.4.1.3, the accommodation sector is also highly concentrated in the inner-city, as the majority of hotel outlets is located along the canals. The only exceptions are the surroundings of the Schiphol Airport and South Amsterdam, both of which embrace various hotel operations at the high-end of the market targeting mainly business travellers. In fact, as Harding (1994) explains, following the shift towards an information/service-led economy since the 1980s, South Amsterdam, which connects Schiphol Airport with the World Trade Centre via a ring-road, has become popular for office developments and is now home to the headquarters of various organisations. As a result, the area has emerged as the major business district of the city.

The study by Claval (1993), which compares the possible itineraries of an average business traveller and a holidaymaker in Amsterdam, provides insight into the concentration of different market segments in disparate parts of the city. The author argues that unlike holidaymakers spending most of their time in Tourist Zone 1, business travellers arrive at Schiphol Airport and head directly for South Amsterdam, where they hold conferences or meetings. The major transport connections, including the A10 ring-road, railway and motorways, save them wasting time in the city centre. Therefore, unless their business meetings are scheduled with some free-time in the evenings, they are more likely to leave Amsterdam with a different impression mainly influenced by post-modern office buildings than the one perceived by visitors who spent most of their time in the historic core.

While the tourism plans of the Amsterdam Tourist Board suggest new initiatives to develop South Amsterdam as a shopping and conference centre (VVV, 2000a), the interview findings confirm that the tourism sector of the city is still concentrated within the inner-city tourist zone. As mentioned earlier when the weaknesses of Amsterdam were analysed, the code *'central tourist zone'* is among the most mentioned weaknesses of the city with 11 quotations. Similarly, the code *'Compact City'*, which is arguably the main reason for the concentration of both tourist products and visitors in the core, was attached to 10 quotations. The quotations emphasising both the concentration of tourism in the historic city centre and the compact city characteristic of Amsterdam include the following:

> *"Tourism is very much happening in the city centre. This is mainly because it is where all the museums, galleries and shops are. You cannot expand the borders of the tourist area by diverting visitors to other areas, as there are not enough tourist facilities outside the centre" [Amsterdam Interview: 10]*

"The tourism industry is concentrated in the historic city centre. The potential of the suburbs and the hinterland is overlooked. Maybe this is only right. Developing tourism is all about money. Besides, some of the suburbs do not want tourism in their area. They do not want big hotels or attractions, as that would mean attracting a large number of visitors in primarily residential areas" [Amsterdam Interview: 8].

"Tourism is centralised in Amsterdam. But it is already such a compact city that no matter how scattered the attractions are, their accessibility would not be a problem" [Amsterdam Interview: 16].

Despite evident results on the centralisation of tourism, the interview findings do not provide a strong correlation between the inner-city tourist zone and its negative effects on the physical carrying capacity of Amsterdam. In fact, as opposed to the significant reoccurrence of the code *'central tourist zone'*, the code *'crowding'* was only linked with a single quotation. The universal view was that Amsterdam does not suffer from mass tourism in such a way that the historic architecture and social structure of the city are under serious threat. As explained earlier, such a view can be justified with the stagnant growth of tourism and the stable visitor numbers attracted by the city. In addition, Munster (1996) relates the adequate absorption of visitors within the urban network to the employment of effective laws and regulations by local planners, which safeguard the heritage culture in Amsterdam. According to the author, the preservation of Amsterdam was guaranteed by strict environment planning policies on various matters ranging from traffic circulation to the use of advertising, and from pedestrianisation to street decoration.

The interviewee, whose views composed the only quotation attached to the code *'crowding'*, mentioned that visitors outnumber residents in places like the Dam Square in high seasons. However, she also noted that the urban economy highly relies on the sector and that there is no urgent need to reduce visitor numbers at this stage. Therefore, it is important to note that the reason for the inclusion of the code *'central tourist zone'* among the weaknesses of Amsterdam was not to imply that the physical capacity was threatened by concentration. Instead, it is thought to indicate that the economic and social benefits of the sector are not equally shared between the centre and the outer districts.

To conclude, despite the plans to introduce South Amsterdam and the IJ Waterfront Development area as future tourist zones, the spatial and functional distribution of tourism attractions and services draw the borders of the major tourist zone of Amsterdam within the very heart of the city. Since tourism development in the outer regions is still at a planning stage, it is difficult to assess how they would reduce pressure on the historic city centre and redirect visitor flows in a way to spread tourism across the city. As Jansen-Verbeke and Van de Wiel (1995) stress, the crucial task for the authorities should be to fit new developments into the existing pattern of tourist space use and to provide strong links between the attractions of the city core and the outer districts.

As the inner city retains its historic prominence and the outer regions evolve as business districts with high-rise post-modern office buildings, one might suggest that it is difficult to establish an obvious connection between the tourist products offered by these disparate zones. Therefore, it can be argued that the historic core will continue to attract the majority of visitors to Amsterdam, while the outer districts will initially attract particular market segments, mainly business travellers. As a result, the attitudes and expectations of visitors found in each tourist zone would differ according to the main purpose of travel. The primary and secondary data collected for this research confirm this argument and indicate a profound commercialisation of the urban façade in the city. The following quotation summarises such views:

> *"There are plans to develop the IJ Waterfront and South Amsterdam as tourist zones... They are targeting business travellers. That is fine. But they have no relation with the historic part of the city... If you try to combine both of these products (historic core and outer districts) in one package, then there is a conflict. A historic city does not go well with skyscrapers and trade centres. There are two different market segments, and they should be marketed separately" [Amsterdam Interview: 6].*

6.4.2.2. Istanbul: A Multi-Centred Megalopolis

Unlike *'the compact Amsterdam'*, the urban growth of Istanbul, which started mainly after the 1980s, is continuing to expand on both shores of the Bosphorus and makes it difficult to draw a line around the constantly swelling landscape. As mentioned in Chapter 4, such incessant growth, has resulted in the city being named *'a megalopolis'* (Kirbay, 1998), where inward migration from across the country means an ongoing search for free land to build either homes for the increasing population or office developments for businesses. As a result, the rent and real values of properties in Istanbul are continuing to rise disproportionately in comparison to other urban areas of the country. In fact, since the demand for urban land has been enormous, purchasing office blocks, residential apartment flats and even uncultivated land in the hinterland has become a major source of income for many property owners (Erkip, 2000; Tokatli and Boyaci, 1999).

The Historic Peninsula, which had been the sole core of Istanbul until the beginning of the 20th century, is now accompanied by many other business and entertainment districts scattered along the shores of the Bosphorus. Having more than one central area is such a unique characteristic of Istanbul that the enormous expansion of the city is widely explained by the theory of *'multi-nuclear urban growth'* (*see Chapter 4*). While Beyoglu and Galata were the first entertainment, residential and business districts outside the Historic Peninsula, the outburst of the city after the 1960s with squatter settlements and multi-floor residential blocks cropping up throughout the city, has demanded new shopping and business centres to emerge in various localities serving the new residents of Istanbul.

As a result, although Eminonu, which is the province on the Historic Peninsula, retains its importance as a major tourism and business district, eight other districts now accompany the peninsula in the list of strategic localities in Istanbul with regards to the concentration of human and business transaction. These districts are Aksaray, Karakoy, Taksim, Osmanbey, Mecidiyekoy, Besiktas, Uskudar and Kadikoy. While six of these business districts are on the European side, Uskudar and Kadikoy are the only two on the Asian side (*see Figure 4.4. in Chapter 4*). In other words, a great proportion of both residential and business dwelling areas of Istanbul still lies on the European side, whereas the Asian side has gained importance in residential developments especially over the last few decades.

According to the National Census held in 1997, 92% of the 9 million residents of Greater Istanbul live in the central districts. The same census also shows that in comparison to the 15‰ annual increase in the nation-wide population between 1990-97, Istanbul accounted for a 34.5‰ annual increase during the same period. Embracing a sixth of the country's population within its borders, Istanbul is also the most densely populated city in Turkey with 1,280 persons per square kilometre (DIE, 2000a). Although the numerous business districts resulted in the majority of the population residing on the European shore, the distribution of residents between the opposite shores is now balancing in favour of the Asian side. In comparison to only a fifth of the population living in Asia in 1950, the proportion increased to 37% in 2000 (TCIV, 2000).

In light of this information, when the resident population is compared with visitor numbers, it can be seen that Istanbul does not suffer from an imbalance between outsiders and locals in the same way that Amsterdam does in high seasons. With 8.5 million residents living in the city centre and 2,4 million international visitors in 2000 (DIE, 2000a), a simple calculation indicates that there are almost 4 residents for each visitor a year. Since accurate statistics on domestic tourism are not available, it is difficult to repeat the estimation for a total visitor figure. However, considering that it was the number of international visitors, which was enough to outnumber the resident population with a ratio of up to 3 visitors per a resident in Amsterdam, there seems to be a better counterbalance between the two groups in Istanbul.

In fact, as mentioned in Chapter 4, the major dilemma faced by Istanbul is neither the increasing visitor numbers nor the unreasonable commercialisation of the tourism sector, but the ever-growing population induced by inward migration. While squatter settlements expand in every possible direction, it has become difficult to provide adequate infrastructure facilities and to maintain the standards of living quality across the city. One can argue that such an influx of new residents would pose a threat in terms of severe concentration and crowding in certain central districts. However, the *'multi-central'* characteristic of Istanbul encourages residents to use the amenities and facilities available in numerous districts and to stay within their neighbourhood area. The diffusion of major retail outlets and recreation opportunities helps, to a certain extent, mitigate what could otherwise be overbearingly chaotic density. In fact, the studies in the literature argue that there are clear differences between the use of urban space by diverse social groups in terms of both housing and recreation preferences (TCIV, 2000 and Erkip, 2000).

A recent report by the Istanbul Governor's Office (TCIV, 2000), for example, states that different income groups tend to concentrate in different parts of the city for recreation activities. According to the report, some residents, who live in shanty towns, never go to the popular shopping streets of the upmarket neighbourhood areas. In the same way, some of those residents, who live in high-income areas along the Bosphorus, are not aware of the existence of some squatter settlements and failed to name and mark them on a city map.

As the preferences of different community groups for recreation activities indicate, tourism organisations are widely scattered across the city. For example, the above mentioned nine business districts are also the major shopping areas consisting of various retail outlets ranging from major department store chains to specialised shops. Similarly, since the city is the birthplace of three different civilisations, there are historic buildings and heritage sites in almost every district of the city, if not on every street. Still, there is an evident concentration of historic buildings and sites in the Historic Peninsula, part of which is an officially recognised and protected heritage site. While the peninsula, also known as Old Istanbul, is the major heritage component of the city's tourism offer, some other well-known attractions such as the Dolmabahce and Beylerbeyi Palaces are situated outside the peninsula and help to divert visitor flows across the city.

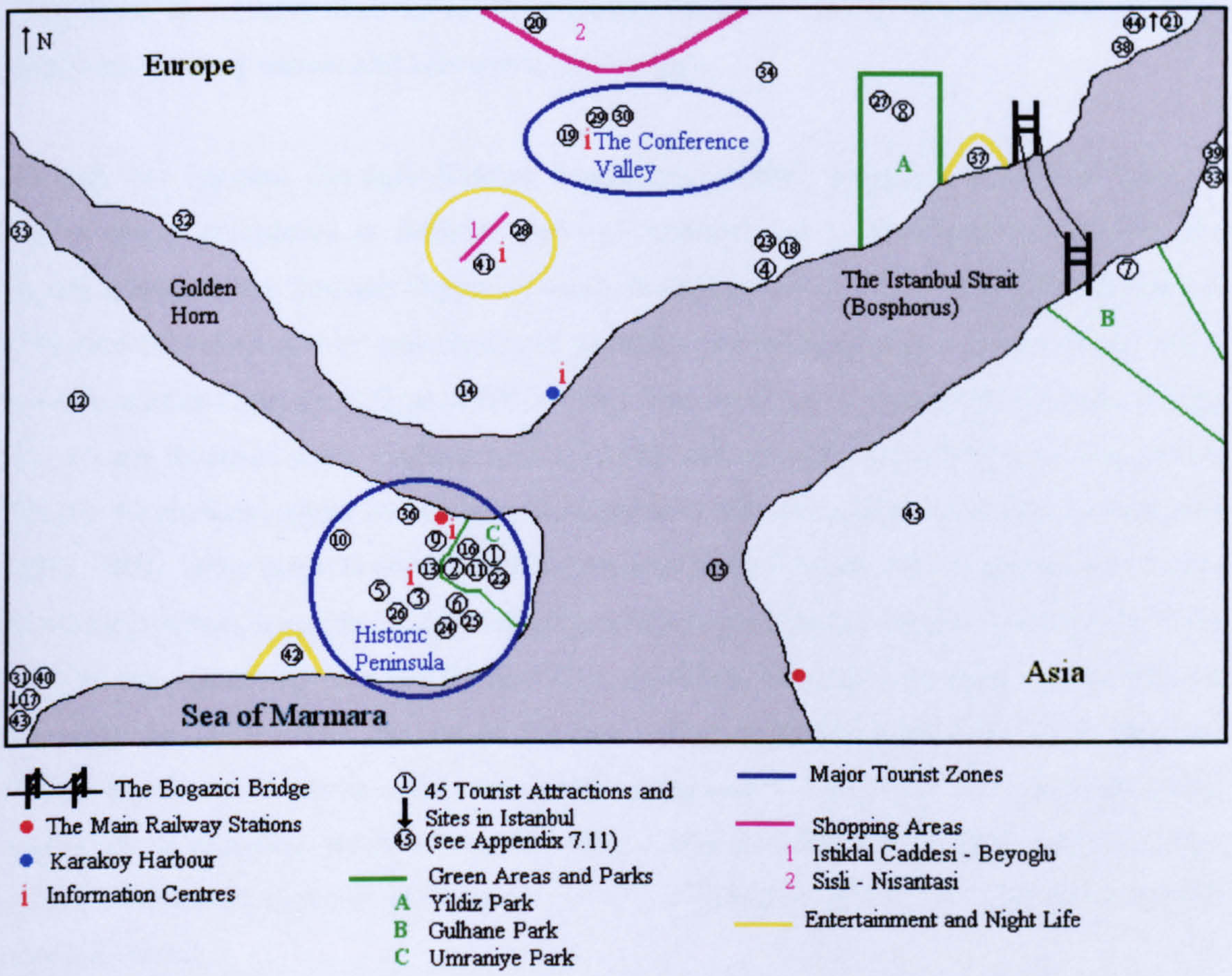
As in Amsterdam, the major tourist attractions and organisations of Istanbul are placed on a map in order to elucidate the tourist zones of the city. Along with the two main railway stations located on both shores of the Istanbul Strait and the Karakoy Harbour on the European side, forty-five different attractions are shown in Figure 6.20. Unfortunately, since the Istanbul Tourism Directorate does not compile statistical data on the most visited attractions, the selection of the attractions is made according to the published marketing material of various city-wide tourism organisations and tour operators. An emphasis is also put on the coverage of attractions appealing to different visitor groups. Therefore, in addition to the attractions, which are mentioned most in published tourist guides, leaflets, booklets and brochures, major shopping malls, entertainment districts, green areas and parks, and conference and exhibition centres are shown in Figure 6.20 (*for the list of attractions, see Appendix 19*).

As the figure highlights, it is difficult to encircle all of the primary and secondary product components of Istanbul's tourism offer in tourist zones. While some are isolated, some resemble a package offer with few other attractions in their vicinity. While the dominance of the Historic Peninsula is unarguable, six of the attractions numbered 17, 21, 31, 40, 43 and 44 are located outside the area covered by the map. This explains why many international visitors start their holiday with a boat tour running in a zigzag route along the Strait and stopping alternately on several attractions on both the Asian and European sides. In addition to the fact that such boat tours may be the best way to experience the scenic view of the Bosphorus, they also help visitors to get familiar with the city, to spot various attractions en route, and to visit them at a later stage of their stay.

Almost a third of the attractions are situated on the Historic Peninsula. As the name suggests, many of these attractions are historic buildings and sites including the major landmarks such as the Topkapi Palace, Hagia Sophia, Grand Bazaar and the Blue Mosque. The Sultanahment Square is situated in the very heart of the peninsula. The square and the pedestrianised routes linking the Topkapi Palace with the Blue Mosque and the Hippodrome with the Grand Bazaar mitigate potential traffic congestion, which may otherwise have been caused by visitor crowds in high seasons. In fact, the adjacent attractions to the Sultanahment Square form an ideal tourist zone serving solely visitors and not representing any threat to the physical capacity of the city, as the attractions are mostly isolated from other urban functions.

Another area marked with a blue circle in the figure, is the so-called *'Conference Valley'*. The area, which unites several conference and exhibition venues, was first introduced as the conference and congress quarter of Istanbul following the International Habitat Conference held in 1996. For the conference, the indoor sports complex was transformed into a multi-purpose convention and exhibition centre *-i.e. the Lutfi Kirdar Convention and Exhibition Centre numbered 30 in Figure 6.20-*, and has been supported by various other facilities and buildings in its close vicinity. In addition to two other major venues *-i.e. the Ataturk Culture Centre and the Cemal Resit Rey Concert Hall numbered 28 and 29 respectively-*, the nearby campus of the Istanbul University with lecture theatres and conference halls enriches the area's standing for congress tourism. The Valley also embraces an open-air amphitheatre and numerous five-star hotels with conference and meeting facilities. The combined conference capacity of these hotels, which include the Hilton Hotel, Swissotel, the Hyatt Regency Hotel, the Intercontinental Hotel and the Marmara Hotel, adds up to over 10,000 delegates to be accommodated at one time in different venues (Oktay, 1997).

Figure 6.20. The Tourist Zones in Istanbul



The Conference Valley is situated right at the centre of the three major business districts -*i.e. Taksim, Osmanbey and Besiktas*-, and is accessible by various forms of public transportation (ICVB, 2000). In addition to the above-mentioned five-star hotels, which especially target business visitors, various other hotel outlets mostly in the districts of Taksim and Besiktas strengthen the area's image as a spatially compact tourism offer with many accommodation opportunities. Similarly, the adjacent entertainment and shopping centres shown as Istiklal Caddesi-Beyoglu (1) and Sisli-Nisantasi (2) in Figure 6.20, provide business visitors with an opportunity to explore the city during their free time after meetings.

While the Istanbul Convention and Visitors Bureau (ICVB) has drawn special attention to the Conference Valley in its promotional publications (ICVB, 2000), another area near the Ataturk Airport has gained importance in terms of business tourism. While various hotel outlets targeting business travellers have emerged around the airport, the recent developments of the World Trade Centre and the CNR International Fair Organisation built in a kind of *'business* *park'* environment opposite the airport, have been attracting both international and national convention and exhibitions since their opening in 1993. While the CNR International Fair Organisation, numbered 31 in the figure, offers four different meeting halls with an exhibition space of 52,000 m^2 (ICVB, 2000), the importance of the area will arguably be further strengthened on completion of the nearby Olympic Village consisting of various types of sports complexes, meeting venues and accommodation outlets.

Although the Istanbul Olympic Bidding Committee (IOBC) proposes to benefit from the existing sports complexes in different parts of Istanbul and to distribute the benefits of a possible hosting of the Summer Olympic Games throughout the city and its environs, the area in South Istanbul called Atakoy was chosen to assemble new complexes in a confined area and in the concept of an Olympic Village (IOBC, 1993). The developments under the Olympic Village Project were favoured and a stadium with a 80,000 seat capacity, the Olympic House and the Olympic Natatorium, where water sports competitions will take place, have already been built (IOBC, 2000). Other projects under construction include an Olympic Park, a gymnasium, fitness and training centres, a hospital and various forms of accommodation outlets. Accessibility of the area with the Ataturk Airport, the E5 and TEM motorway rings and the light-railway services connecting the Village with the rest of the city, makes Atakoy an ideal location as the focal point for the Games. Therefore, the area, which has already become one of the business tourist zones with an adequate stock of accommodation and exclusive conference and exhibition facilities, is destined to evolve as *'the sports centre'* of Istanbul, whether the Games are brought to Istanbul or not.

With regards to the dispersion of the accommodation sector in Istanbul, it has already been mentioned that the product offers of the major tourist zones such as the Historic Peninsula, the Conference Valley and the surroundings of the Ataturk Airport, are all supported by a large number of hotel establishments. As analysed in Section 6.4.1.2, an outburst of the accommodation sector in Istanbul presented itself with the government initiatives provided in the 1980s, and has played an important role in shaping the hotel guest mix of the city in favour of business travellers. Most of the new developments were built as four- or five-star hotels targeting mainly this particular market. Therefore it is not surprising to discover that majority of the hotel outlets are strategically located near one of the business districts of Istanbul (*see Table 6.19*).

Among the provinces listed in Table 6.19, the ones with the minimum number of hotel guests and visitor nights are mainly the residential suburban areas such as Kucukcekmece and Buyukcekmece on the European side and Kartal, Pendik and Beykoz on the Asian side. Silivri and Catalca in the Southwest and Sile in the Northeast of Istanbul, meantime, are the provinces in the hinterlands with coasts on the Sea of Marmara and the Black Sea respectively. As the remarkable difference between the number of domestic and international hotel guests in these provinces indicate, they are mainly popular among the domestic market and especially with the residents of Istanbul who have summer-houses in one of the seaside towns.

Table 6.19. Distribution of Hotel Guests and Nights Spent in Istanbul by Provinces

	Number of Guests (1999)			Number of Nights Spent (1999)		
Provinces	International	Domestic	TOTAL	International	Domestic	TOTAL
Princess Islands	3,952	6,281	10,233	9,866	13,260	23,126
Bakirkoy	152,054	132,233	284,287	346,706	221,647	568,353
Besiktas	211,539	228,594	440,133	416,371	346,332	762,703
Beykoz	1,762	3,660	5,422	4,004	5,116	9,120
Beyoglu	279,602	186,128	465,730	624,638	337,882	962,520
Eminonu	344,450	196,080	540,530	856,340	350,123	1,206,463
Fatih	159,212	115,546	274,758	341,682	216,890	558,572
Kadikoy	18,138	24,079	42,217	53,342	51,521	104,863
Kartal	2,045	4,985	7,030	4,855	7,258	12,113
Kucukcekmece	2,031	1,692	3,723	4,623	3,015	7,638
Pendik	4,330	9,020	13,350	14,872	15,922	30,794
Sariyer	16,101	43,238	59,339	37,737	73,298	111,035
Sisli	115,898	74,482	190,380	252,149	160,364	412,513
Uskudar	4,885	20,970	25,855	12,229	29,572	41,801
Buyukcekmece	5,008	9,001	14,009	13,033	15,514	28,547
Catalca	10,836	24,277	35,113	24,280	58,992	83,272
Silivri	29,472	45,318	74,790	79,295	87,447	166,742
Sile	4,154	9,042	13,196	9,284	17,178	26,462
TOTAL	1,365,469	1,134,626	2,500,095	3,105,306	2,011,331	5,116,637

Source: TBYGM (2000a).

Similarly, although four of the nine Princess Islands *-i.e. Kinaliada, Burgazada, Buyukada and Heybeliada-*, are accessible with regular ferry services from both the European and Asian shores, they mainly attract local and domestic holidaymakers in the summer. Despite the fact that the islands, especially Buyukada, offer an ideal opportunity for visitors to escape the hectic inner-city and to experience 19th century houses in a protected environment where no car traffic is allowed, they only account for 0.4% of the hotel guests in Istanbul. Although Buyukada is included in the majority of tourist guides with its famous fish restaurants and horse-drawn carriage rides, its limited tourism offer along with its compact size seem insufficient to encourage visitors to stay overnight, but they take daily excursions.

In 1999, a third of hotel guests stayed in the provinces of the Historic Peninsula *-i.e. Eminonu and Fatih-*, and accounted for more than 34% of the visitor nights spent in the city. Two business districts on the European shore, Besiktas and Beyoglu (Taksim), acquired large shares of the hotel guest market with 18% and 19% respectively. These business districts were followed by other European provinces; Bakirkoy and Sisli. While the importance of Sisli *-i.e. Osmanbey and Mecidiyekoy-* as a hotel zone stems from its status as a business district bordering the Conference Valley and embracing major shopping streets, Bakirkoy is the province, where the Ataturk Airport, the Olympic Village and the World Trade Centre are situated.

The only business districts, which failed to attract large number of staying visitors, are the ones on the Asian side. In comparison to their European counterparts, Kadikoy and Uskudar only accounted for 2% of the hotel guests in Istanbul. Their combined total of hotel guests and visitor nights does not even add up to what Sisli, the less popular business district on the European shore with regard to the number of visitors staying in accommodation establishments, achieved in 1999. Moreover, Kadikoy and Uskudar are the only business districts in Istanbul, where the number of domestic guests outnumbered international visitors.

The above information explains why the hotel zones of Istanbul have mainly emerged and evolved around the business districts of the European side. While the highest concentration of hotel guests occurs in the Historic Peninsula, the districts where the adequate number of hotel outlets is supported by other types of tourist products, such as conference and exhibition halls, landmark attractions and shopping streets, have also proved to be successful in attracting large number of both domestic and international visitors. Although the central districts are connected by various forms of public transportation and road networks, the accommodation sector, whose supply is fairly equally shared by these widely scattered business districts, can hardly be seen to present a potential threat to the physical capacity of the city.

As with the accommodation sector, shopping activities are also concentrated around the business districts of Istanbul. As Tokatli and Boyaci (1999) state, following the expansion of the city in all possible directions after the 1980s, the location and characteristics of retail outlets have been influenced by both a growing consumer market and the effects of globalisation. The large, steady and consistent demand for consumer products has resulted in international capital and technology entering the city mostly in the form of partnerships with domestic corporations, which has changed the use of the urban landscape in relation to consumption and commerce. In addition to purpose-built shopping centre developments across the city, famous international department stores such as Benetton, Marks and Spencer and Toys R Us have opened their branches in several business districts and, sometimes even in numerous spots within the same province. As a result, as Tokatli and Boyaci argue, Sisli, Besiktas and Bakirkoy on the European side and Kadikoy in Asia have all emerged as up-market shopping districts with numerous retail and catering organisations lined up in the streets like the Vali Konagi Avenue in Nisantasi and the Bagdat Avenue in Kadikoy.

The urban morphology of Istanbul from a shopping tourism point of view, however, can be narrowed down to a few areas, where the majority of customers are visitors. To start with, the

Grand Bazaar is not only a must-see attraction, but it is also where visitors can find various souvenirs such as leather jackets, jewellery, carpets and pottery, all within a single indoor environment. The Bazaar continues to attract most international visitors not only because of its strategic location in the Historic Peninsula, but also because of its significance as a heritage building. As a result, the customer profile of the Bazaar is mostly dominated by international visitors. The nearby Egyptian Bazaar, which unites spice shops within a similar, but smaller, indoor environment, further enriches the tourist product offer of the Historic Peninsula, as it is not only a historic shopping mall, but also a colourful cultural exhibition for many Westerners.

For the reasons given above, Sisli is also shown as the modern shopping centre of the city in Figure 6.20. The other area, which is marked as a shopping zone, is the Istiklal Avenue in Beyoglu. This cultural quarter of Istanbul on the European shore is a meeting place for both locals and visitors and unites a rich variety of retail and catering organisations, theatres, cinemas, art galleries, bars and night clubs in an artillery avenue and in branches on both sides. Due to the concentration of various entertainment activities including night clubs, taverns, street cafes and restaurants, Kumkapi in the Historic Peninsula and Ortakoy near the Bogazici Bridge are also shown as the entertainment districts of Istanbul together with Beyoglu in Taksim.

While the above picture of the tourist zones of Istanbul are mainly drawn from the literature review, the interview findings also verify the argument that it is difficult to suggest a single central tourist zone in this multi-central megalopolis. When asked about the spatial and functional concentration of tourism attractions and organisations in the city, the views of the interviewees varied so widely that a code titled *'tourist zones'* was created to accompany the code *'central tourist zone'*. In contrast to a single quotation attached to *'central tourist zone'*, the number of quotations listed under the code *'tourist zones'* reached 14. Although the concept of *'central tourist zone'* does not quite apply to Istanbul, the views of the interviewee who said that the Historic Peninsula can be considered the main tourist zone are as follows:

> *"(The Topkapi Palace) is one of the most visited tourist attractions of Istanbul, partly because it is located in the Historic Peninsula. The Palace and other landmark heritage sites and historic buildings such as Hagia Sophia and the Blue Mosque, make the peninsula the main tourist zone of the city. They are situated within walking distance of each other. Such a cluster of attractions not only results in a continuous flow of visitors to the area, but also provides the opportunity for each attraction to benefit from accumulated visitor numbers" [Istanbul Interview: 10].*

While almost all of the interviewees agreed on the importance of the Peninsula as the pivotal centre of heritage tourism in Istanbul, they also gave examples of other parts of the city, whose functional characteristic is determined by the tourism organisations and attractions appealing to different visitor markets. As one of the interviewees said, apart from the residential districts and suburban areas where squatter settlements shaped the urban façade, Istanbul is so rich in tourist attractions, services and facilities that it is difficult to draw rigid borderlines around particular tourist zones. The tourist zones mentioned most by the interviewees are the Conference Valley, the surroundings of the Ataturk Airport, the recreational sites along the waterfronts of both the Istanbul Straits and the Golden Horn, the Princess Islands and Beyoglu (Taksim). Some of the quotations attached to the code *'tourist zones'* are as follows:

> *"It is so difficult to pinpoint a single meeting point of visitors in Istanbul. One might say that it is Taksim. But Istanbul is a metropolitan area, which has been growing enormously, and has been witnessing developments of new recreation sites, shopping centres and entertainment places throughout its evolution. Since it has not completed this ongoing expansion process yet, new attractions and activities continue to be introduced by both public and private sector organisations... They are now moving towards the outskirts, where land is cheaper. For example, the south of the Ataturk Airport, in the province of Bakirkoy, has become one of the most feasible locations for hotel and restaurant developments" [Istanbul Interview: 16].*

> *"Although you cannot deny the importance of the Historic Peninsula for international tourism, the tourist attractions are countless in Istanbul. Places like Beyoglu, Ortakoy, the Princess Islands and even the nearby summer resorts both on the coasts of the Sea of Marmara and the Black Sea are all tourist zones in their own right" [Istanbul Interview: 6].*

While such a wide dispersion of tourism organisations and tourist attractions across the city borders help mitigate possible crowding problems caused by dense visitor flows in particular tourist zones, Istanbul still suffers from concentration of human transaction mainly in the business districts on the European shore, such as Taksim and Sisli. As mentioned in Section 6.3.2, such overcrowding is hardly caused by tourism in Istanbul. It is more an outcome of increasing population and ineffective upgrading and improvement of infrastructure facilities. As a result, traffic congestion and parking maintain their high-rank positions among the major problems of the city on the local authorities' agenda. In fact, two of the three quotations attached to the code *'crowding'* were about city-wide problems of Istanbul, while the only tourism-based concern was the congestion caused by organised tours in the Historic Peninsula. The later quotation is as follows:

> *"The Historic Peninsula is an invaluable component of Istanbul's tourism offer. As if the visitor crowds around the Topkapi Palace, Hagia Sophia and*

the Blue Mosque were not enough, tour operators are trying to bring large groups of visitors with coaches right to the entrance point of the attractions. Up until very recently, such coaches were even allowed to enter the gardens of the Topkapi Palace. Tourism is clearly important for the local economy. But unless we protect our heritage sites, there will be nothing to offer in the future" [Istanbul Interview: 6].

To conclude, the tourist attractions, services and facilities of Istanbul are so widely dispersed that some cannot even attract an optimum number of visitors due to the lack of supporting products and facilities in their close proximity. For example, Gulersoy (1990) questions the location of the Military Museum, which is situated away from similar attractions presenting a compact package around the Historic Peninsula. The author argues that the Museum is rarely included in the itinerary programmes of tour operators, as commuting visitors to another part of the city is considered to be both time-consuming and costly. Similarly, Dincer and Ertugral (2000) argue that some historic buildings and heritage sites in the province of Fatih are not paid the attention they deserve by the local authorities and urban planners. The projects to renovate and transform these buildings into tourist attractions has been neglected by the local authorities, as the area whose accessibility is poor owing to inadequate transportation facilities, is not considered to have the potential to be developed as a tourist zone.

The Istanbul Governor's Office split the city into divisions according to the dominant urban functions carried out by each district and province (TCIV, 2000). According to this segmentation, while Beyoglu (Taksim) and Eminonu (the Historic Peninsula) are classified as *'Heritage and Tourism Centres'*, Sisli and Besiktas are named *'Culture, Entertainment and Shopping Centres'*. One can add the above mentioned nine business districts to the numerous centres of Istanbul. While such a *'multi-central'* characteristic of the city clearly mitigates against intolerable visitor condensation, attractions in remote locations can also cause confusion and dissatisfaction among visitors, who waste time and money travelling from one spot to another. What is clear, however, is that the physical capacity of Istanbul is not threatened by the tourism sector, as the city is yet to attract an optimum number of visitors that can be accommodated by the existing facilities and services.

6.4.2.3. London: Central Tourist Zone versus The Outskirts

In terms of visitor numbers attracted by a single destination, London stands out not only from the other case study cities of this research, but from many other urban destinations competing in the international market. While both the *'compact'* Amsterdam and the *'developing'* Istanbul are yet to attract over 3 million international visitors a year, London surpassed the target of 5 million visitors during the 1970s (*see Section 6.2.1*). Today, the city is the leading destination in the world with nearly 30 million visitors a year, almost half of whom are international visitors. The rich variety of tourist products and services ranging from heritage sites to shopping centres and from musicals to cultural festivals, help the city maintain its leading position and continue to attract visitors from around the world.

Although a consistent and abundant flow of visitors has earned the tourism sector an advantageous position in the local economy, it has also resulted in the local authorities being more cautious about the maintenance of the urban environment and the management of visitor flows across the city. In fact, the distribution of visitors across the city and the introduction of new tourist products and services outside the inner-city have been among the major aims of the London Tourist Board in the tourism strategy reports prepared every three to four years (LTB, 1982, 1993 1996 and 1997a; LTBCB, 1987 and 2001a). Similarly, the concentration of tourism activities in the central boroughs and the environment-related problems caused by congestion have often been addressed in the published reports and research of various public authorities and partnership organisations (DCMS, 1999; ALG, 1998b; London First, 1998b; The London Borough of Camden, 1997; CLP, 1998). Such authorities all tackle the issue and introduce or recommend solutions within their sphere of responsibility.

The reports all raise concerns regarding the concentration of tourism activities and attractions in the three boroughs of Westminster, Kensington-Chelsea and Camden. Considering that central London is already one of the most densely populated urban areas in England (Bull, 1997), the impacts of the concentrated tourism sector on the physical capacity of the city becomes even more urgent. Moreover, these three central boroughs are among the most densely populated boroughs of London, where 63% of the 7.2 million resident population lives in inner-city. While Kensington and Chelsea were top of the list with 14,930 persons per square kilometre, Westminster and Camden became third and sixth respectively in 1999 (Office for National Statistics, 2001).

When the total number of visitors *-i.e. 28.3 million in 2000-* is compared with the population of 4.6 million residents of inner-London, it can be seen that there are over 6 visitors for each resident in the city. If this simplistic approach to appraise the balance between the different groups of urban users is repeated with the number of international visitors only, the ratio reduces to less than three visitors for each resident. Although such figures are comparable with the same ratios of Amsterdam (*see Section 6.4.2.1*), one should not overlook the larger volume of both visitors and residents accommodated in central London. Besides, it is fair to add that London, which covers an area of 1,580 km², is geographically wider than Amsterdam, hence is expected to have a higher physical capacity threshold in terms of number of visitors attracted at one time (Office for National Statistics, 2001).

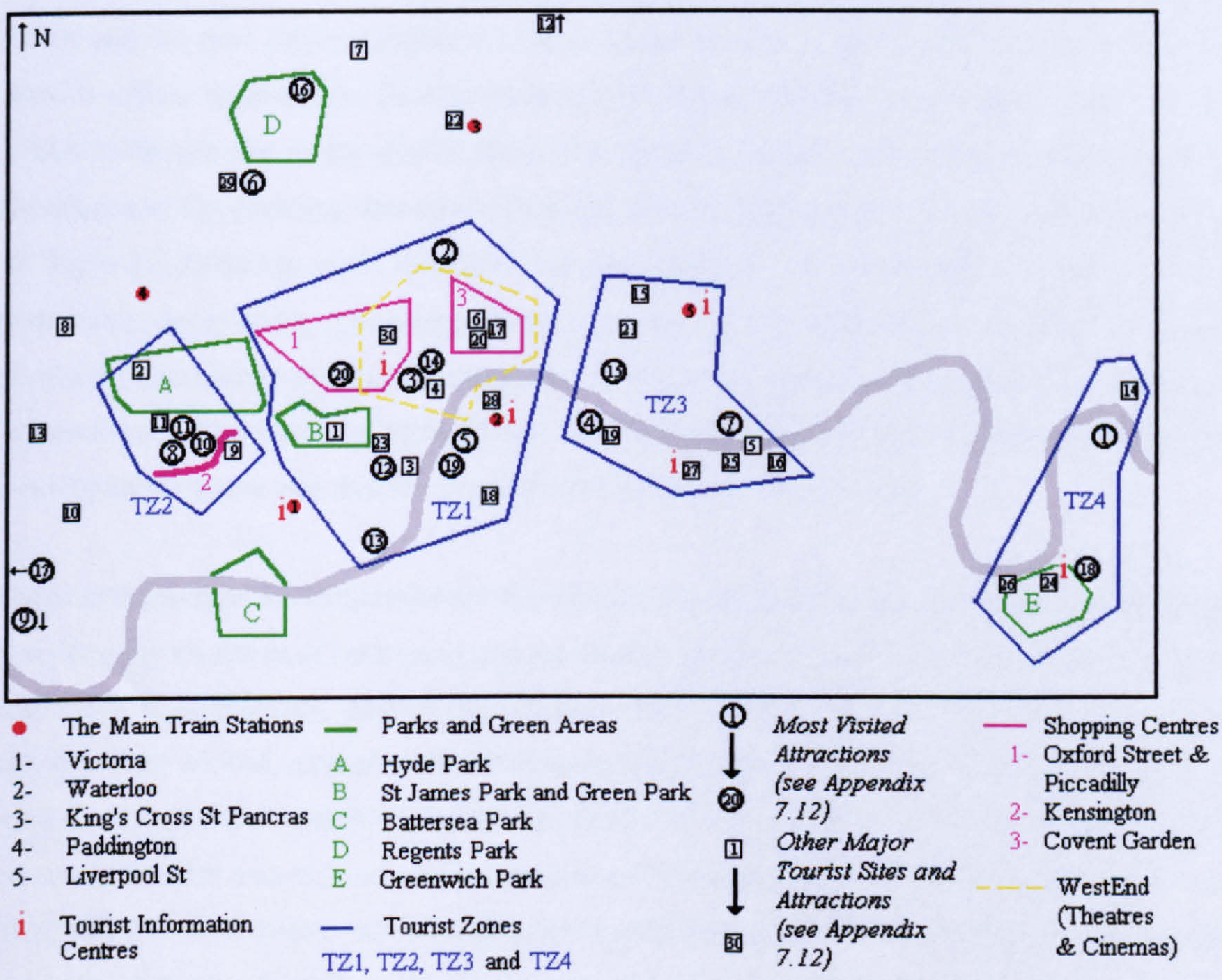
The imbalance between the numbers of visitors and residents in favour of the former, support the argument that London is a well-established tourist destination and its economy heavily relies on the well-being of the tourism sector. Therefore, the efforts of the local authorities to spread the benefits of tourism across the city and to minimise negative effects of tourism congestion in the centre are not fortuitous. On the contrary, they are strategically planned according to the very characteristics of the tourism sector in the city. Among these characteristics, the concentration of the primary tourist products of London's tourist offer in the city centre is arguably the most important one. For example, as Bull (1997) argues, one of the most important aspects of London as a tourist destination, is its history. While the supply of heritage buildings and sites cannot clearly be expanded in line with increasing demand, the location of the major heritage landmarks of London mainly in the three boroughs mentioned above and also in the boroughs of Tower Hamlets and Greenwich means a large number of first-time visitors are found in these areas.

As one of the main prerequisites of a successful tourism organisation to be located in proximity of various other primary attractions and supplementary products and services, it is not surprising that such areas, where heritage has played an important role to nourish the sector, have become the major tourist zones of London. Along with historic buildings, sites and monuments, these areas have witnessed the emergence of all kinds of accommodation establishments, catering services and some contemporary attractions such as museums, entertainment organisations and arts galleries throughout the evolution process of the sector and its tourism offer.

In order to further illustrate the importance of central London with regards to the concentration of tourism products and services, the most visited attractions of the city are placed on a city map in Figure 6.21. While the statistical information on the most visited 20 attractions of the city is available from the recent statistical reports prepared by the London Tourist Board, another thirty attractions are also shown in the figure in order to exhibit a wider representation of the dispersal of the sector across the city (*see Appendix 20 for the list of both the most visited attractions and the major tourist sites and attractions in London*). As in the case of Istanbul, the selection of the major tourist sites and attractions is made according to the ones, which are covered most by various tourist guides, brochures, booklets and leaflets. In addition, the major shopping centres, green areas and parks, the main railway stations, the tourist information centres and the West End theatre zone as identified by the London Tourist Board (LTBCB, 2001c) are all shown in Figure 6.21.

As the figure indicates, while only three of the 50 attractions are located outside the area covered by the map, there is an apparent concentration of attractions in the city centre shown as Tourist Zone 1 (TZ1). More than a third of the attractions are within the boundaries of TZ1 along with the West End theatre zone and two of the major shopping centres of the city *-i.e. Oxford Street-Piccadilly and Covent Garden-*. While the zone mainly covers the borough of Westminster and a part of Camden, the distinctive cluster of museums in Kensington including the Victoria and Albert Museum, Science Museum and the Natural History Museum, resembles the Museum Quarter of Amsterdam. As with the Museum Quarter of Amsterdam in the vicinity of Vondelpark, the area shown as Tourist Zone 2 (TZ2) embraces a part of Hyde Park and its cultural and heritage tourist offer is supported by an upmarket shopping centre consisting of Sloane Street and the Brompton Road, where Harrods, one of the most famous department stores in London, is situated.

Figure 6.21. Tourist Zones in London



Towards the east of the city, two other areas are considered to present the characteristics of a tourist zone. First, Tourist Zone 3 (TZ3), where the major landmark attractions of London such as the Tower of London and St Paul's Cathedral are, is marked encircling the new attractions on the south bank of the River Thames including the Tate Modern Art Gallery, Shakespeare's Globe Theatre and the London Aquarium. In fact, as Tyler (1998) states, there have been considerable efforts by the London Borough of Southwark to develop tourism on the south bank of the River mainly through the provision of initiatives for infrastructure improvement and attraction development since the early 1990s. While some of the new attractions are developed under the Millennium scheme, a new footbridge linking the opposite banks of the river was built with the aim of encouraging visitors initially to cross the river and then to spend more time and money in Southwark (London First, 1998b). Within the context of a tourist zone, the role played by this footbridge, which connects St Paul's Cathedral with the Tate Modern Art Gallery, is as remarkable as the strategic locations of the attractions, which are adjacently lined up along the River Thames rather than being isolated in remote places further away from the River.

Secondly, Tourist Zone 4 (TZ4) embraces the Greenwich Peninsula and the heritage attractions in the Greenwich Park such as the Old Royal Observatory, Cutty Sark and the National Maritime Museum. The other attractions within the boundaries of TZ4 are the Millennium Dome and the new ExCel exhibition centre. As mentioned in Section 6.3.3.2, there have been notable efforts to revitalise East London by introducing tourism as a catalyst since the early 1980s. Although the major aim of the initial statutory board, entitled the London Docklands Development Corporation, was to revitalise the area by developing new office space in the form of high-rise buildings and upmarket housing schemes along the River Thames, various partnership organisations focusing mainly on the tourist offer of East London have been involved in numerous tourism development, management and marketing projects. Among such partnerships, TourEast London, Pool of London Partnership, Greenwich Waterfront Development Partnership and the Cross River Partnership can be listed.

The construction of the Millennium Dome and the preparations for the Millennium Celebrations also drew the attention of both local and national governments to the area especially prior to the year 2000. Consequently, despite much controversy about its success, the Millennium Dome was the most visited attraction in 2000 and contributed to the image enhancement of East London as a tourist destination (Smith and Smith, 2000). While the future of the Dome is still undetermined, the area marked as TZ4 continues to present great potential as a tourist zone with a combination of heritage, cultural and business tourism products in its offer. In addition to the evolution of the Docklands as the contemporary business district of London, ExCel, the new exhibition centre, further invigorates the historic offer of the Greenwich peninsula. While the accessibility is strengthened by the new Jubilee underground line extension, the Docklands Light Railway and the upgraded pier facilities on the River Thames, the future of the area highly depends on the persistent and coherent approaches of the responsible organisations toward tourism and its role in the revitalisation of the area.

While the distribution of tourist attractions and sites in Figure 6.21 underlines the significance of the inner-city and the emerging tourist zones in the east and south of London, it is not surprising to find out that the majority of accommodation establishments are found in the centre and in the vicinity of major tourist attractions and facilities. As Table 6.20 illustrates, the existing hotel room and bedspace stock of the city still concentrates on the boroughs of Westminster, Kensington and Chelsea and, Camden. Hillingdon, meantime, has witnessed the emergence of many five and four-star hotels, which are strategically located mainly to serve those business visitors arriving at Heathrow Airport. Due to the specific target markets determined by the location of these hotels, most of them have large conference rooms and venues to attract meetings and exhibitions. A similar development process can also be expected in Croydon due to the increasing importance of Gatwick Airport. However, the importance of Heathrow Airport as one of the world's busiest airports, still causes Croydon to be overshadowed by Hillingdon in terms of the interest of investors (London First, 1998b).

As the table shows, a great proportion of bedspace is supplied by the establishments located in the borough of Westminster. Moreover, Westminster and Kensington are also noted to be the hotel zones embracing most of the deluxe and five-star hotels of the city. Among the prestigious locations preferred by upmarket hotel organisations, Strand/Bloomsbury, Mayfair/Piccadilly and Marble Arch/Marylebone are listed in a report investigating the hotel sector in London (London First, 1998b). The same report also adds that three-star hotel outlets targeting mainly the leisure-break market are found in Kensington, Camden and Westminster. The accommodation establishments scattered around Heathrow Airport, meantime, tend to be four- or five-star hotel organisations.

Table 6.20. Known Stock of Serviced Accommodation in London by Borough

	Establishments	*%*	*Bedspaces*	*%*
Barnet	27	2.3	1,234	0.8
Camden	117	10.0	23,895	15.6
Croydon	53	4.5	2,250	1.5
Ealing	32	2.7	1,769	1.2
Greenwich	41	3.5	958	0.6
Hammersmith & Fulham	27	2.3	5,226	3.4
Hillingdon	29	2.5	12,545	8.2
Hounslow	28	2.4	1,330	0.9
Islington	15	1.3	2,899	1.9
Kensington & Chelsea	152	13.0	25,083	16.4
Lambeth	13	1.1	2,051	1.3
Richmond	74	6.3	1,431	0.9
Southwark	16	1.4	2,227	1.5
Tower Hamlets	4	0.3	2,723	1.8
Westminster	322	27.5	57,806	37.8
Others	220	18.8	9,512	6.2
TOTAL	1,170	100	152,939	100

Source: LTB (2000a), p.36.

The report suggests South Bank, Greenwich, East London and the corridor linking central London with Heathrow Airport as the future hotel zones of London. Considering that the report was published prior to the Millennium Celebrations, the selection of these areas is explicit, as East and South London were given priority in terms of tourism development and the decentralisation of visitor movement in the city. The emergence of new tourist attractions, the improved accessibility and the initiatives provided by the local authorities have all strengthened the credibility of Greenwich, East London and the South Bank as tourist zones.

While the central boroughs refuse to license the conversion of derelict buildings into hotels and execute restrictive planning and building regulations in order to relieve the saturated capacity of inner-city and to avoid further overcrowding within their boundaries, they, to a certain extent, help the outer boroughs to influence the location-based decisions of investors in favour of remote places. As a result, most of the new hotel rooms added to the accommodation stock of London between 1995-2000 were built in the so-called *'future hotel zones'* mentioned above (*see Section 6.4.1.1*). Nevertheless, as the recent distribution of hotel rooms by the boroughs shown in Table 6.20 indicates, the gap between central London and the outskirts is yet to be narrowed down. Considering that expanding room capacity and the provision of initiatives to encourage further hotel investment are no longer among the aims of the London Tourist Board (LTBCB, 2001a), the precedence of Westminster as the most popular hotel zone of London encompassing major landmarks and tourist services within its borders, can be expected to prevail over the outskirts for years to come.

In contrast to the emerging influence of the outer boroughs on the equal distribution of serviced accommodation across the city, shopping as a tourist activity is still very concentrated in central London. As a one-off survey conducted in 1992 showed, shopping came only second to visiting friends and relatives as the main purpose of leisure trip to London (LTBCB, 2000a). According to the survey, 17% of visitors to London said that shopping was the main reason for their visit to the capital. Therefore, while it is impossible to neglect the significance of shopping opportunities in London from a tourism perspective, a recent promotional leaflet prepared by the London Tourist Board (LTBCB, 2001f) helps to identify the shopping areas, where visitors are expected to be found in large numbers.

These areas are Oxford Street, New Bond Street, Regent Street, Piccadilly, Carnaby Street, Seven Dials, Covent Garden, Chelsea and Knightsbridge. Since the first five of these areas are actually joining streets in the inner city, they are shown as an undivided shopping area *-i.e. shopping centre 1-* in Figure 6.21. In the same way, while the nearby Seven Dials and Covent Garden are combined within an area marked as shopping centre 3, Brompton and Sloane Streets in Kensington are illustrated as shopping centre 2. In addition to these districts, where various retail outlets are lined up along with numerous restaurants and cafés, the weekly street markets of Camden and Portobello Road in Notting Hill also attract mainly young visitors and antique hunters. While an exclusive variety of products ranging from household equipment to designer labels, and from books to jewellery are offered in these shopping districts and street markets,

Figure 6.21 corroborates the argument that tourism-based shopping still occurs within the city centre in London. In fact, most of the major shopping streets are located within Tourist Zones 1 and 2. Westminster incorporates seven of the nine shopping centres mentioned above.

Given that the world famous musicals and theatre plays are among the strong cultural components of London's tourist offer (LTBCB, 2000a), the West End Theatre Zone is also shown in Figure 6.21. According to the London Tourist Board (LTB, 1997b), visitors account for a third of all West End theatre tickets and play an important role in the subsistence of the city's arts sector. Although the theatre zone shown in the figure is adapted from a recent promotional booklet (LTBCB, 2001c), the majority of theatres and cinemas are particularly situated within a further confined area between Piccadilly and Covent Garden. Hence, one can even argue that there is a concentration of theatres, concert halls and cinemas within the West End, while the whole area shown as the theatre zone in Figure 6.21 resembles the heart of not only the tourism sector, but also the whole city.

A possible conclusion to such an examination would be that the central districts of London do not just encompass the majority of accommodation, but also get crowded out due to the proximity of landmarks attractions, major shopping centres, theatres, restaurants and museums within the three central boroughs of Kensington and Chelsea, Westminster and Camden. The only exceptions to these boroughs are Greenwich and Tower Hamlets where the room and bedspace capacity of serviced accommodation is relatively limited. The fact that serviced accommodation and attractions are densely packed in the central boroughs also suggests that a large proportion of tourist spending occurs in the centre too. The major problem caused by such congestion, however, is that, it often results in long queues in front of the major landmark attractions such as Madame Tussaud's Wax Museum and the Tower of London, especially during high seasons. In fact, the visitors queuing to enter Madame Tussaud's are warned by numerous signs outside the museum that they should expect to queue for up to a couple of hours.

The attractions are not the only organisations, which have to cope with large numbers of urban users in this already densely populated capital city. Transportation also causes bottlenecks for the effective and fast movement of both visitors and locals within the city centre during peak hours. For instance, despite the provision of alternative public transportation services throughout the city, it is not uncommon to observe a long chain of red double-decker buses obstructing the traffic flow in Oxford Street. Similarly, the underground and railway services require consistent maintenance and upgrading due to a huge number of passengers travelling on these services every day. Apart from visitors, over one million people are said to commute to London for work on a daily basis (CLP, 1998).

Therefore, while the physical environment of London is under great pressure, the tourism sector, which attracts millions of visitors every year, is partly responsible for the congestion in the central boroughs. The popularity of the city among a wide variety of visitor markets demand systematic and coherent planning and visitor management schemes run in co-operation with all the authorities concerned in order to sustain the urban network with minimal damage to its physical, social and economic environments. In this context, the emergence of various partnership organisations within the last two decades and the improvements to transportation infrastructure can be shown as the initial responses to congestion by the bodies aiming to decentralise the sector and distribute its benefits across the city.

While the above picture of the tourist zones of London is drawn with the data gathered mainly from the literature review, the results of in-depth interviews are no different. The quotations attached to the codes *'central tourist zone'*, *'tourist zones'* and *'crowding'* reached a peak in London in comparison to the findings of the other two case study cities. The codes *'central tourist zone'* and *'tourist zones'* were linked with 18 and 14 quotations respectively. Given that only 17 interviews were held in the city, the results reflect that some interviewees stressed either the centralisation of tourism or the emerging tourist zones in the outer boroughs more than once during the interviews. Thus, in some cases, more than one quotation from the transcripts of a single interview were attached to the code concerned repeatedly in order to emphasise the repetitive remarks of the interviewee.

While 11 out of 18 quotations listed under the code *'central tourist zone'* consisted of uniform views on central London being the major tourist zone, the rest of the quotations specifically identified particular areas as central or core tourist zones of London. Among these areas, the whole of Westminster and its West End quarter were mentioned most. Camden, Kensington, Oxford Street and the borough of Tower Hamlets were also named as central tourist zones by different interviewees. The following are some examples of such views:

> *"The heart of London is the area stretching from Kensington to Camden through West End. Most of the attractions, shops, museums and hotels are in this area. It is accessible by bus, coach, underground, car and cab" [London Interview: 7].*

> *"Central London is the key tourist district of the city. It is where the history of London lies... The major heritage attractions are all situated within their close surrounding... If you are on a shopping trip, you go to Oxford Street or Knightsbridge. If it is the musicals that you are after, you have to be in the West End... There is not much happening out of the centre" [London Interview: 10].*

The code *'tourist zones'* was created to highlight the views of the interviewees on the districts of London other than the inner-city, where the combination of nearby attractions and tourist products are considered to present the characteristics of a tourist zone. As the high number of quotations attached to the code indicates -*i.e. 14*-, most of the interviewees were aware of the projects and plans to develop tourism in the outer boroughs and to use the sector as a regeneration tool in places like Greenwich and South Bank. In fact, four of the interviewees were selected from those authorities and organisations, which were directly involved in tourism development schemes running in these areas at the time of interviews. In addition to the Managing Director of the London Tourist Board, who clearly takes part in all sorts of tourism development and management projects run across the city, the Tourism Officer of the London Borough of Southwark, the Project Manager of TourEast London and the Tourism Policy Officer of the London Government Association provided insights into the tourism projects ranging from new attraction development to infrastructure improvement in Greenwich, East London and the South Bank.

Although most of the interviewees supported the efforts to spread tourism across the city, two interviewees raised concerns over the attractiveness of the emerging tourist zones especially for first-time international visitors. Four examples of both sceptical and supportive views on the emerging tourist zones of London follow:

> *"There is an awful lot going on at the moment... Each year, there are, let's say, 25 million people who want to come to London from abroad, and they spend £10 billion... You build two or three more attractions... But they always go to the same heritage attractions. And now you have just built three more, if they still go to the same three attractions, people will find it harder to attract visitors to their attractions... You distribute a wider range of attractions, therefore you get a thinner number of visitors for each product. That is something that people are slightly concerned about... I think what is planned for London should be all right. But if we go on producing after the Millennium and keep adding more and more major attractions, I think several of them will fail" [London Interview: 4].*

> *"I admire the concept of spreading tourism across the city. But I do not think it will be very effective in the short-term. Because there are not enough reasons to go to East London, for example. The area is not interesting for the international travel market. You can see the same in Paris in terms of marketing the business quarter of the city, which is not historic. It does not really work" [London Interview: 8].*

> *"Because overseas tourism is so concentrated in central London, London could take more visitors without any damage done to the environment. Visitors can be spread elsewhere. What we are now seeing in London is quite astonishing. On the South Bank of the Thames, there is an area starting at Tower Bridge right through to Vauxhall Bridge, which is being developed as a new tourist area of London. I think, in ten years time, that will be one of the main tourist places in London" [London Interview: 6].*

> *"What happened in recent years is a big increase in hotel development outside the central area, in suburban town centres and on artillery roads coming into London. So a lot more people are now staying out of the centre... Greenwich, for example, is an area, which is developing quite rapidly as a tourist zone. So, there are now places where visitors could be distributed rather than more development occurring in Camden or in Westminster" [London Interview: 12].*

The code *'crowding'* was also linked with more quotations (7) from the London interviews than the ones from Amsterdam (1) and Istanbul (3). While three of the seven quotations were about traffic congestion in central London partly caused by overcrowding visitor flows in high seasons, one interviewee pinpointed the possible negative effects of crowding on the city's competitiveness in the international tourism market. According to the interviewee, the sheer number of visitors may result in dissatisfied holiday-takers and the possible resentment among locals towards tourism may require appropriate action-taking by the local authorities. Noise and pollution were also mentioned by the interviewees in reference to the deteriorated physical environment of Central London. The quotation summarising such views is as follows:

> *"There is a problem of congestion and crowding in the centre. Given the fact that the transportation infrastructure is not that bad in London in comparison to many other metropolitan areas in Europe and the USA, some visitors may not even be aware of the problem. But, it needs to be improved... (The authorities) are concerned about the problems such as traffic congestion, noise and pollution in the centre. But that is why they are involved in various kinds of visitor management schemes" [London Interviewee: 16].*

To conclude, the spatial clustering of tourist products and services in city destinations relies on various tourism-based and city-wide factors. The needs and expectations of different market segments, the itineraries prepared by tour operators and travel agents, the co-operation among the attractions located nearby, the promotional material focusing on certain landmark attractions or the newly developed ones, and the ease of transportation within a city all influence the evolution of tourist zones. In the same way, as the case of Istanbul showed, the economic and social trends affecting not only the city, but the whole country, can alter the use of urban space by different resident groups and visitor types. Besides, as Jansen-Verbeke and Van de Wiel (1995) pointed out, urban areas are dynamic networks. The changes in the urban façade and environment can easily cause changes in preferences of visitors to spend more time in different parts of a city destination.

The research findings collected from the primary and secondary data provided an insight into the present tourist zones and crowding problems of the case study cities. The mapping of various tourist attractions and sites revealed the spatial diffusion of the tourist offer and the concentration in certain parts of each city. As a result, the emerging tourist zones in London and the efforts to divert especially repeat visitors to new attractions built outside the inner-city, and the stabilised visitor numbers in the *'compact'* heritage core of Amsterdam are hoped to assist the development of marketing strategies for the *'multi-centred'* Istanbul in Chapter 8.

6.4.3. Seasonality

Seasonality, which indicates fluctuating visitor numbers at different times of the year, is a typical characteristic of tourist destinations. Many factors ranging from climatic conditions to national holidays, from the need of specific market segments to the marketing activities of tourism organisations, influence demand patterns of destinations. Visitor arrivals to city destinations are reasonably balanced throughout the year in comparison to holiday resorts, as their offer package consists of various types of attractions and products appealing to different market segments (Butler, 2001). However, there is no doubt that the effective maintenance and safeguarding of the physical carrying capacity of a densely populated city destination require an equal distribution of visitors not only across the city, but also throughout the year. No matter how diverse the market segments attracted by a city destination, unavoidable tourism concentration in certain periods of the year would put great pressure on the effective functioning of the urban network. Besides, although a universal demand pattern of city destinations forms a non-peak flow denoting that no season has a remarkably higher share of visitors over any other (Butler, 2001), an equally distributed visitor flow throughout the year would only be beneficial, if the highest number of visitors at any time is within manageable capacity limits.

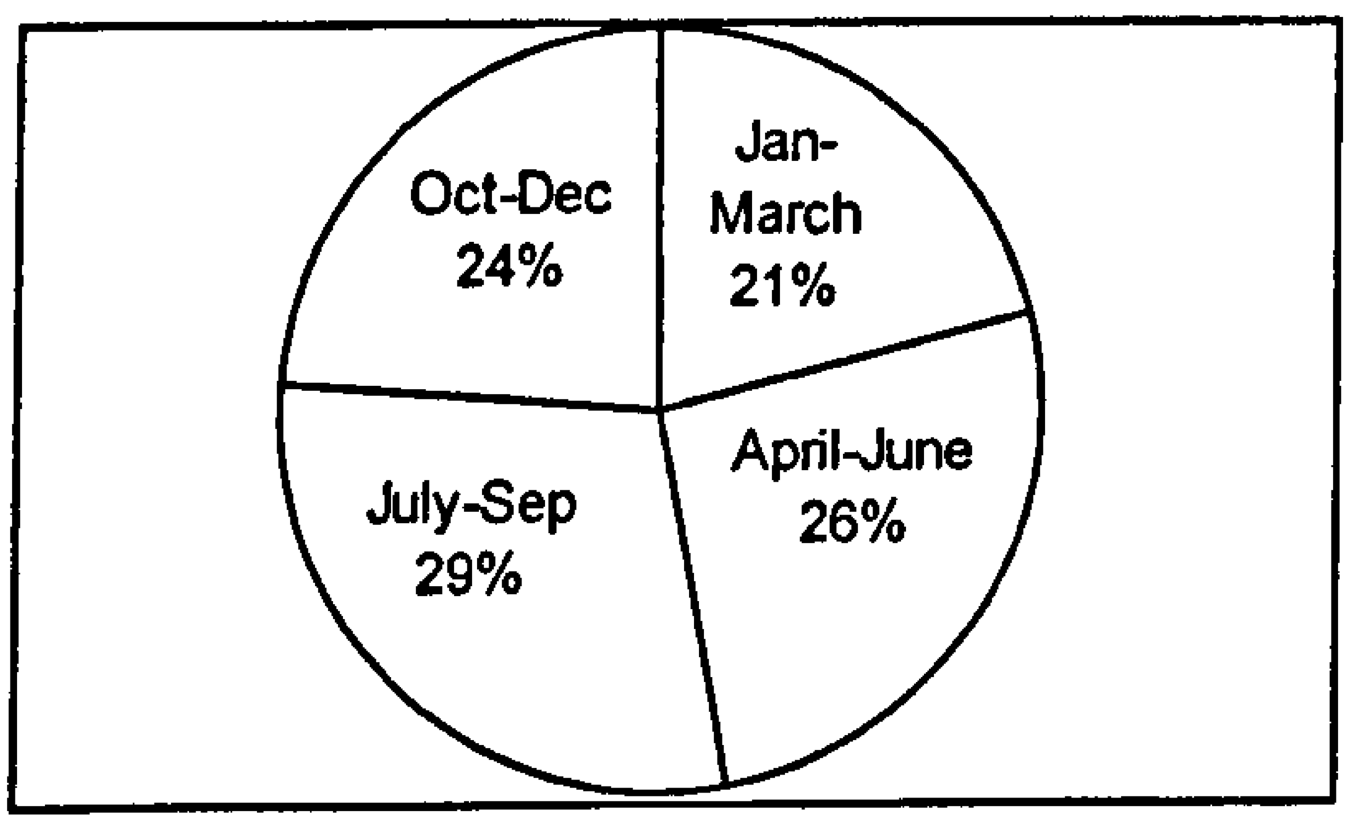
6.4.3.1. Seasonality in London

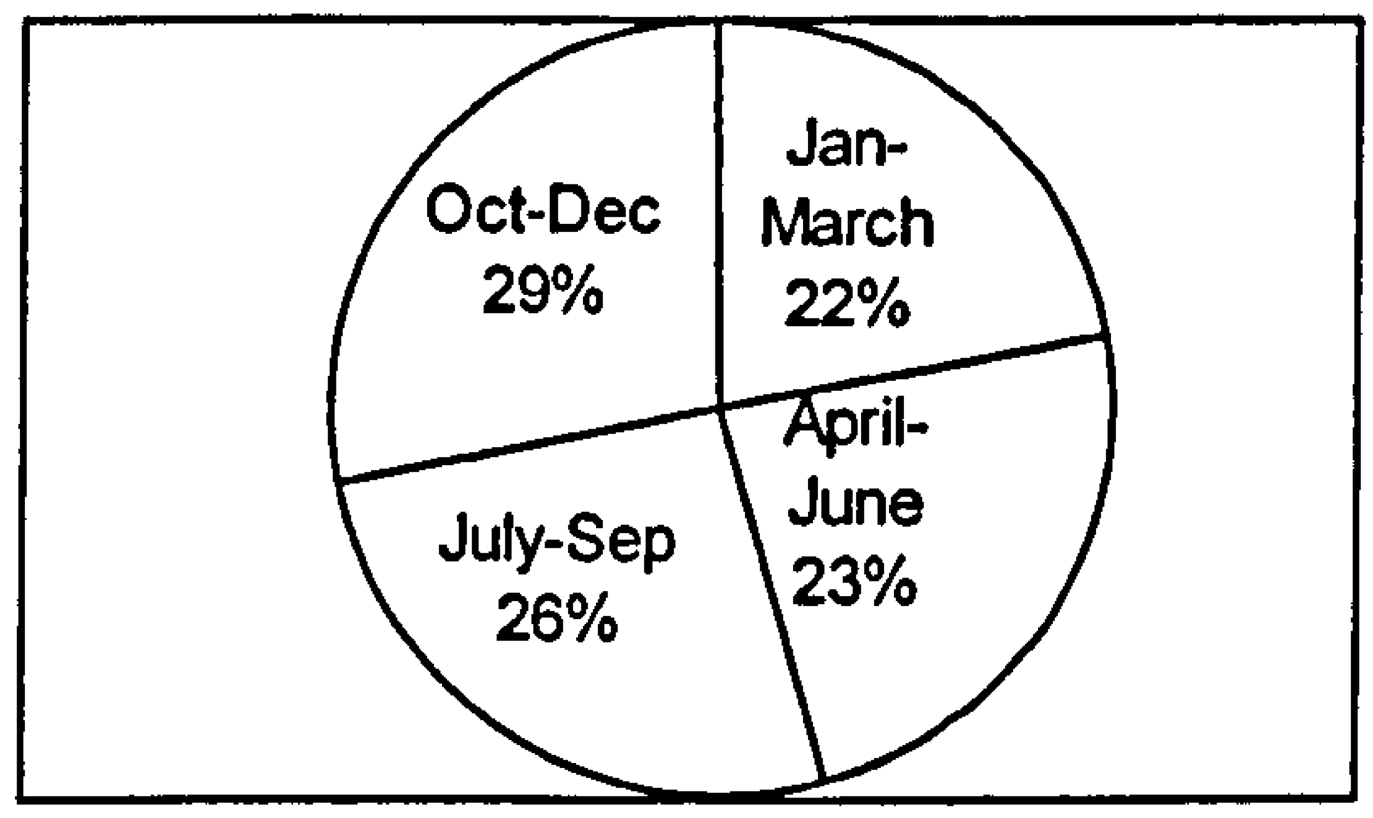
With regard to the distribution of visitors throughout the year, none of the case studies in this research presents an extreme pattern of seasonality with an evident dominance of one or two seasons over the rest of the year. On the contrary, they all seem to enjoy moderately balanced visitor arrivals in different seasons with minimal fluctuation. In their study on the seasonal occupancy of accommodation establishments in England, for example, Jeffrey and Barden

(2001) note that the hotels in London reflect non-seasonal occupancy patterns in comparison to pronounced or extreme seasonality patterns in some seaside and peripheral areas. The authors note that there is a linear correlation between the locality and size of tourist destinations and the nature and intensity of seasonality. The larger a human settlement becomes, the wider market segments it appeals to, which pertains to minimised seasonal fluctuations in visitor arrivals.

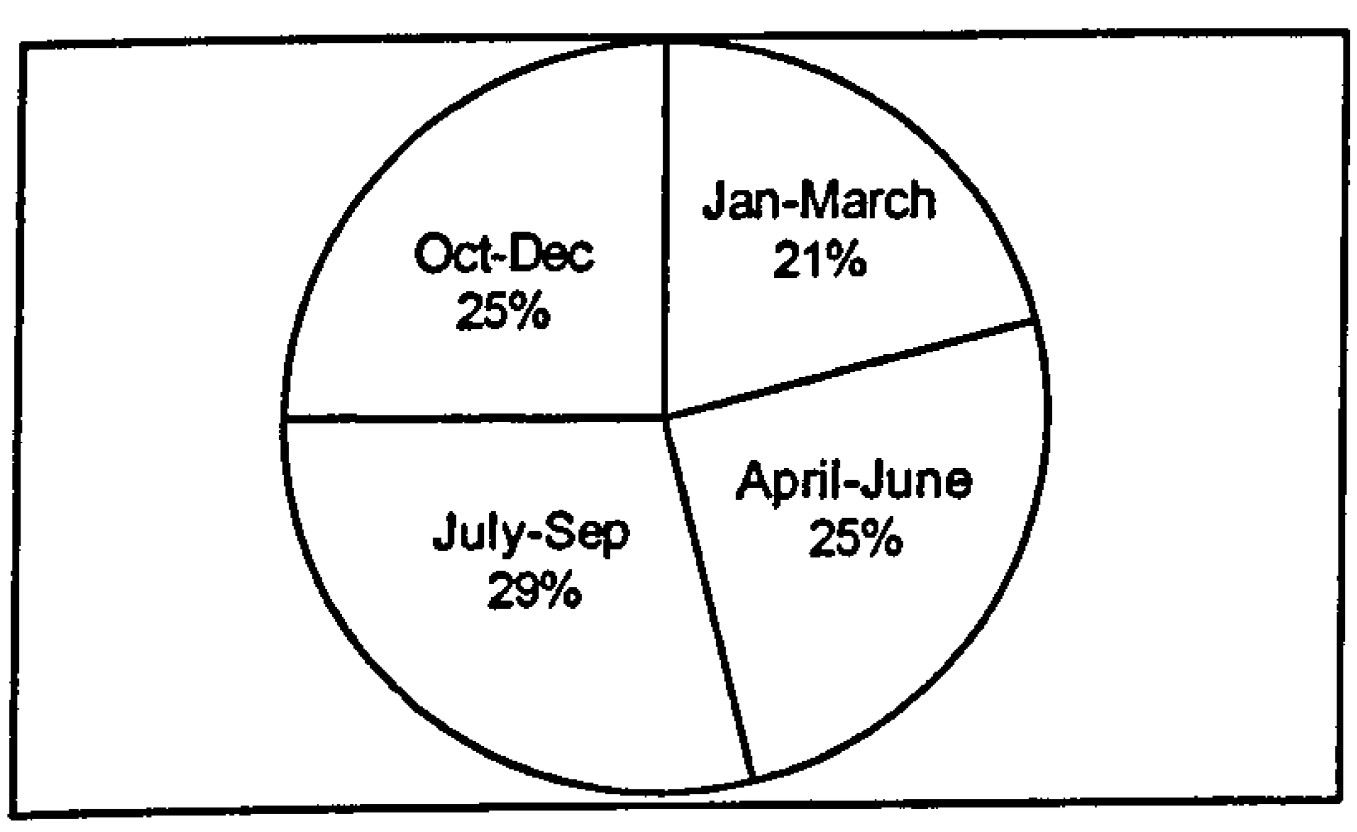
Figure 6.22. Seasonal Distribution of Visitors to London in 1999

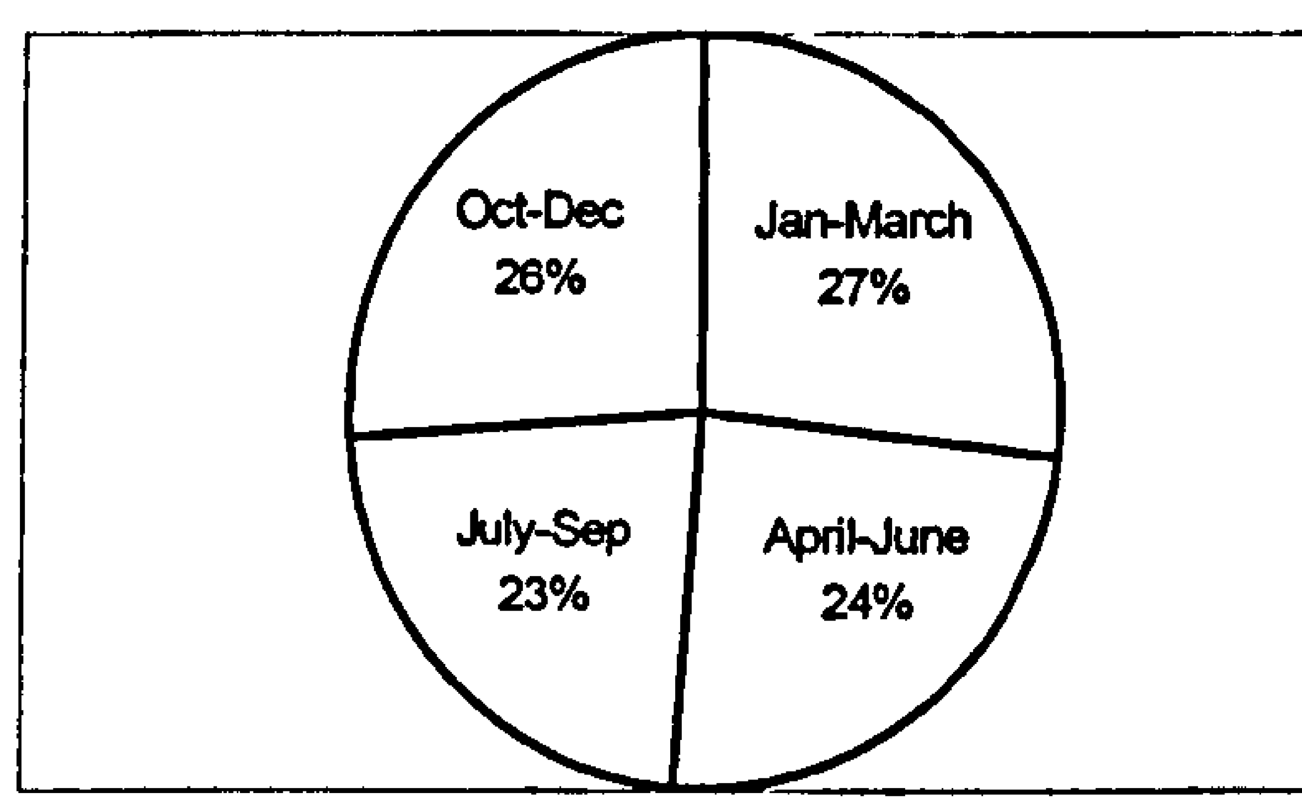
A) International Visitors — Domestic Visitors



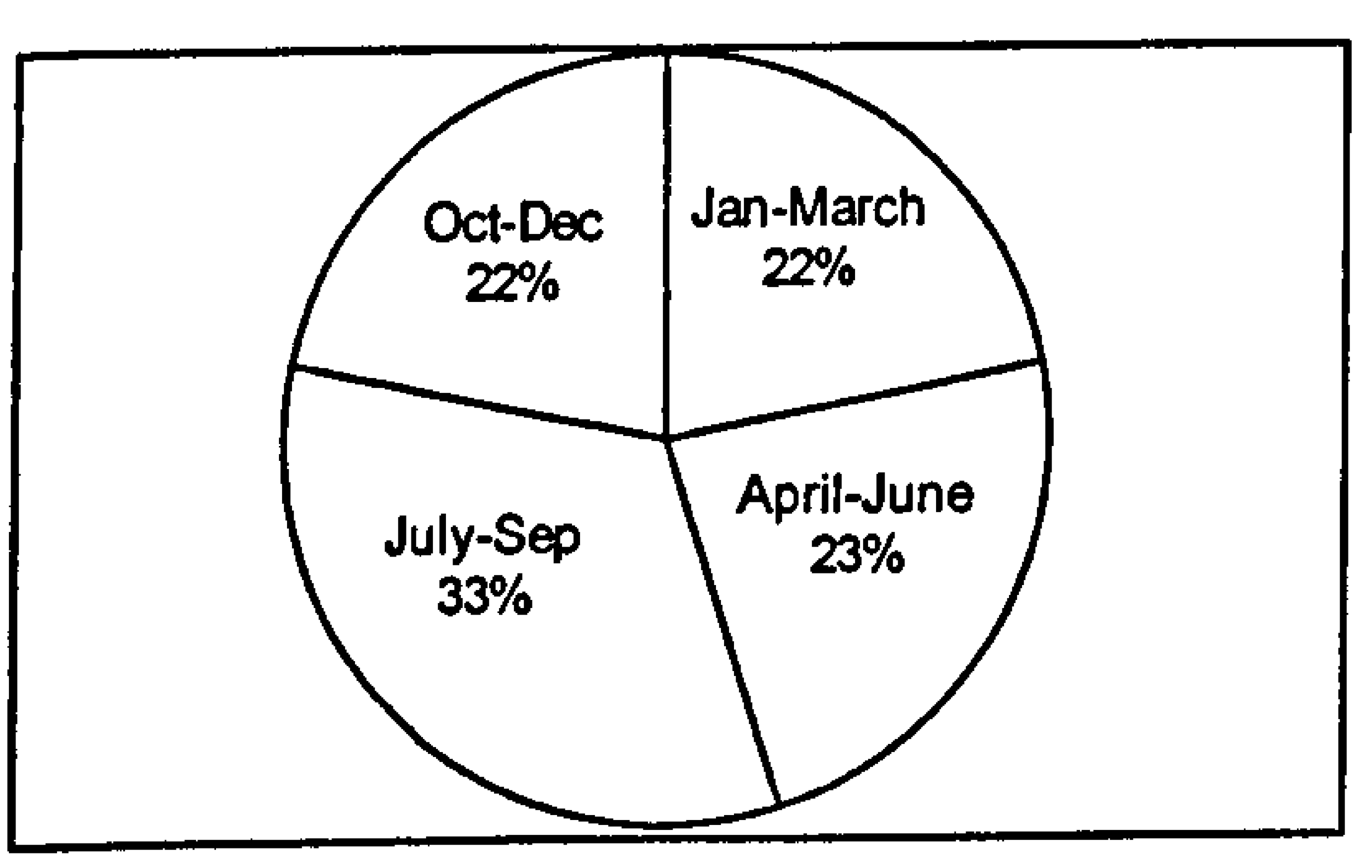


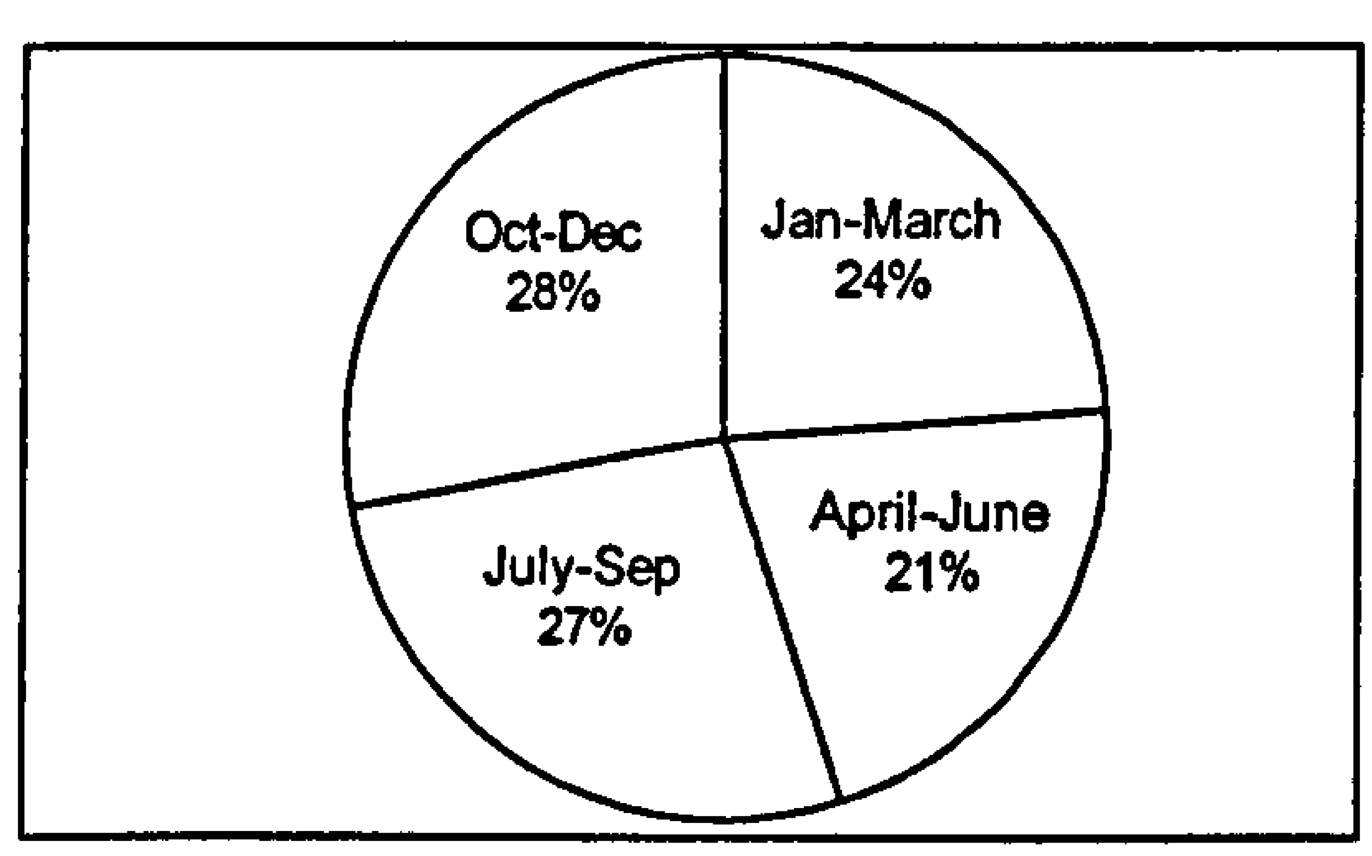
B) International Visitors Expenditure — Domestic Visitors Expenditure





C) International Visitor Nights — Domestic Visitor Nights





Source: LTBCB (2000a).

As Figure 6.22 indicates, the seasonal distribution of both international and domestic visitors suggests that none of the three-month periods of the year gets less than 20% of the overall visitors. Moreover, the contrasting concentration of international and domestic markets in different seasons seems to counterbalance the spread of total visitor numbers throughout the year. In contrast to the popularity of the period April-September among international visitors, the highest number of domestic visitors was the last quarter of the year in 1999.

The popularity of summer months among the international markets was also reflected in the seasonal distribution of visitor expenditure and nights spent in London. The share that each three-month period received from the total international visitor expenditure was almost a reproduction of the quarterly distribution of visitors in 1999. Section C of Figure 6.22, meantime, suggests that those international visitors, who visit London in the summer months, tend to stay longer in serviced accommodation than visitors arriving either in spring or autumn. As with the international market, the distributions of domestic visitors and the nights spent in London resembled each other with minor differences, whereas the relatively unpopular winter months between January-March attained the largest share in visitor spending over the rest of the year. In contrast to only 22% of domestic visitors travelling into the city between January-March, the prominent 27% of visitor spending occurring in the same period, can partly be attributed to the *'January sales'* attracting shoppers from around the country.

Because of a fairly equal spread of visitors across the year, seasonality management is no longer listed among the aims of the London Tourist Board. In one of the initial Tourism Strategy Plans prepared by the Board in 1987 (LTBCB, 1987), the need for a wider seasonal spread of visitors in London was stressed and targeting different market segments in different tourist seasons was proposed. The more recent strategic plans, however, put emphasis on scattering visitors across the city rather than the year in order to eliminate any potential negative effects that increasing visitor numbers may have on the urban network (LTB, 1993 and 1996; LTBCB, 2001a). The aim of the Board regarding the seasonal spread of visitors is not to alter the current demand patterns, but to maintain a favourable diffusion of disparate market segments in different parts of the year.

In their study examining the seasonal demand fluctuations in a case study destination, Lundtorp et al. (2001) show that visitors travelling with different purposes may cause different forms of fluctuation in arrivals to a destination. Therefore, while the authors suggest that unpropitious visitor arrivals can be balanced through attracting subsidiary market segments in off-peak and shoulder months, London clearly benefits from its perceived attractiveness in manifold potential market segments. In fact, Boniface (1995) relates the status of London as an *'all-year-round destination'* to the diversity of tourist products and services, the accessibility of the city to generating markets and the world-wide image of the city as a shopping, heritage, culture and entertainment centre.

The interview results also corroborate the above stated facts and statistics on the minor fluctuation in visitor arrivals to London. Although the code *'seasonality'* was attached to five quotations, three of the remarks on seasonal demand patterns were raised by those interviewees, who were representatives of tourist attractions and private sector organisations. Their main concern was with altering visitor figures related to their own organisation rather than the evaluation of seasonality as a city-wide issue. Another interviewee mentioned the relatively busier summer months without referring to any obstacles caused by seasonal tourism congestion. The final quotation was about the need to maintain the equal distribution of visitors both across the city and throughout the year on an ongoing basis. While examples of these quotations follow, the first provides an interesting viewpoint on the consequences of seasonality in tourist destinations:

> *"We mainly target the domestic market, more specifically the domestic business market... Our business is seasonal. January, February and March are never busy. Although November is not very busy throughout London, it is a good month for us. Many people still do not want to travel in winter. You find the television channels fully improved in winter. They know that people would stay indoors, because it is darker and colder outside... People enjoy outdoor activities in summer" [London Interview: 5].*

> *"(London) gets overcrowded especially in tourist seasons. One of the main complaints, we always get from our visitors is the long queues in front of our museum especially in summer months" [London Interview: 10].*

> *"July, August and September are the busiest months... But (London) can continue to attract visitors. We can definitely accommodate more visitors by spreading them across the city and throughout the year" [London Interview: 17].*

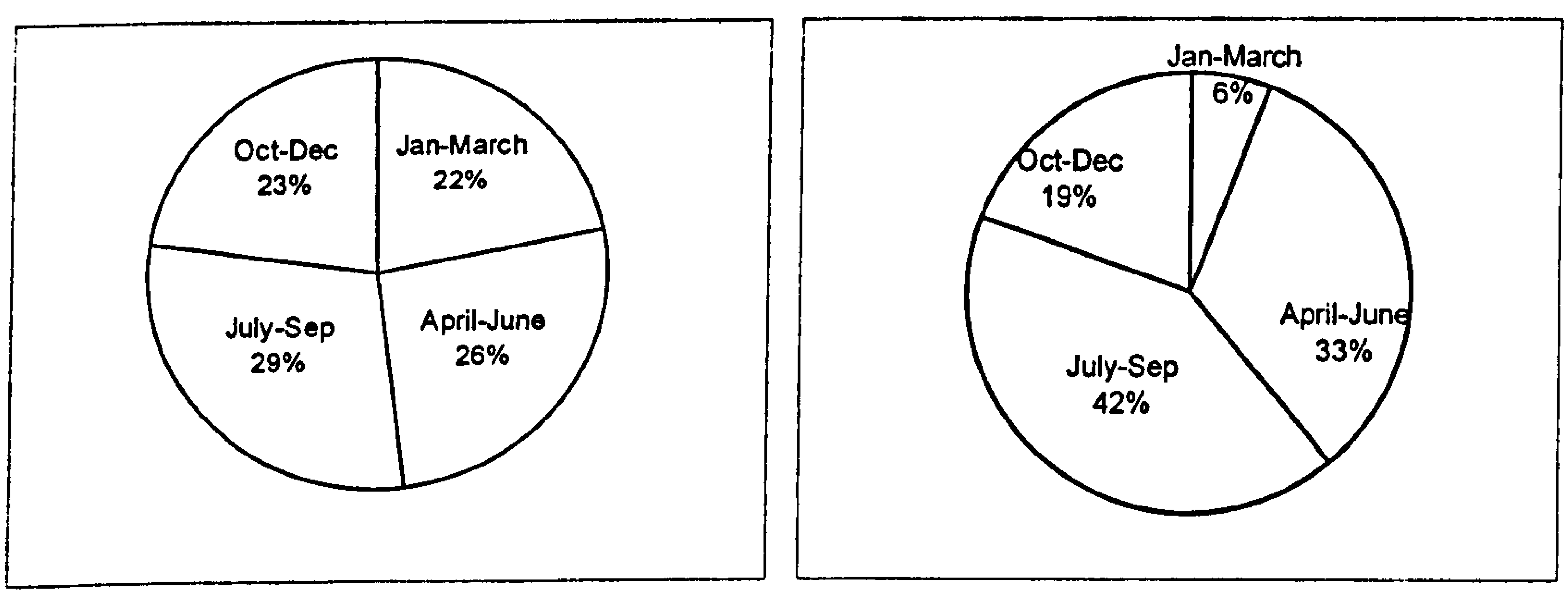
6.4.3.2. Seasonality in Istanbul

As with London, Istanbul enjoys a fairly equal distribution of visitors throughout the year. Despite the fact that most visitors to Turkey are concentrated in summer months and mainly in coastal resorts, Istanbul receives balanced arrivals of both international and domestic visitors even during the off-peak season of those *'sea-sun-sand'* destinations. Although summer is also busy in Istanbul, the seasonal fluctuation of visitors is not sharp. As Figure 6.23 shows, 29% of the international visitors, who spent at least one night in serviced accommodation in 1999, travelled to the city between July-September. July and August were the busiest months and each accounted for 10% of the overall international staying visitors. January and December, meantime, were the months when the figure decreased to a minimum. However, even during these winter months, Istanbul managed to acquire a higher percentage of visitors -*i.e. 6% by both months*- than the nation-wide average of 4% (TBYGM, 2000b and 2000d).

The only particular market segment for which the statistical information on seasonal distribution is available from the Ministry of Tourism is the international same-day visitors, who arrived at Karakoy Harbour in 1999 (*see Figure 6.23*). Although the data cover those visitors who travelled to Istanbul by all means of sea transportation, a thorough analysis of the seasonal concentration of same-day visitors could only be possible with further information on day-trippers using alternative modes of transportation. In fact, in 1999, less than 9% of international visitors arrived at the Karakoy Harbour. While half of these visitors were same-day visitors, the main market generators for this particular segment were the Western European countries and the United States of America. With a market share of 65%, the dominance of these market generators suggests that most of the demand was composed of cruise passengers (TBYGM, 2000d). Consequently, one can argue that there is a clear seasonal fluctuation of visitors on cruise trips to Istanbul with significant concentration in the spring and summer months.

Figure 6.23. Seasonal Distribution of International Staying and Same-Day Visitors in Istanbul (1999)

International Staying Visitors International Same-Day Visitors*



*The data only include those visitors who arrived at Karakoy Harbour.

Source: TBYGM (2000d).

Although statistical information on domestic tourism in Istanbul is not available, research by Oktay (1997) indicates that the seasonal fluctuation of domestic tourism depends highly on the purpose of visit. The author argues that the majority of domestic tourists, who prefer to visit Istanbul in the summer months, are mainly from two particular market segments; VFR -*i.e. visiting friends and relatives*- and the leisure-break markets. The annual four-month school holiday between June and September and warmer climate conditions are shown as the main reasons why these segments and especially families prefer to travel in summer. Visitors, whose main motives of travelling are to participate in cultural activities and sports competitions, to shop or to seek health treatment, meantime, are found to be travelling throughout the year with a slight concentration in the summer. Business travellers, on the other hand, are said to be dispersed almost equally throughout the year.

While the results of tourism statistics and the literature review indicate that Istanbul achieves a balanced diffusion of both international and domestic tourism throughout the year by attracting disparate market segments in different seasons, the interview results present a uniform view on the non-seasonal patterns of tourism in the city. Among the five quotations attached with the code *'seasonality'*, three include such views as seasonality is not yet a problem for the city, but needs to be paid attention, if the targets to increase visitor numbers in future are achieved. The only point regarding existing demand fluctuations was raised by an interviewee who was concerned about the seasonal occupancy rates experienced by hotel establishments. While all of the five interviewees emphasised the need to achieve a wider seasonal spread of visitors, four suggested that marketing Istanbul as a congress destination and developing facilities and services to serve this particular market segment can alleviate visitor concentration in the summer months. Examples of these quotations are as follows:

> *"The climatic conditions in Istanbul are ideal for tourism. It is neither too cold in winter nor too hot and humid in summer. That is why Istanbul does not experience extreme seasonality in tourism. Besides, the congress tourism is developing rapidly. The guest profiles of most five-star hotels are mainly consisted of business travellers and congress delegates. Therefore, to a certain extent, business and congress tourism helps to balance visitor arrivals throughout the year" [Istanbul Interview: 17].*

> *"There is not a typical seasonal pattern in visitor arrivals to Istanbul. As a congress centre, we, sometimes, find it difficult to operate our business in full capacity in the summer months. But it is not an Istanbul-related problem. It is the nature of our business... While our meeting rooms and halls are fully booked in spring and autumn, July is usually the quietest month for us. We put an extra effort to attract business in July and Ramadan" [Istanbul Interview: 5].*

> *"The number of international visitors tends to decrease by October until it picks up again the following April or May. Four- and five-star hotels attract business travellers and can achieve relatively higher occupancy rates in winter months than those budget hotels, which mainly target holiday-makers" [Istanbul Interview: 13].*

6.4.3.3. Seasonality in Amsterdam

As with Turkey, the Netherlands has always experienced a seasonal concentration of international tourism, with the majority of foreign visitors and visitor nights falling in the summer months. Moreover, the relatively shorter tourist season in comparison to the Mediterranean destinations, was shown as a weakness of the sector in a nationwide tourism strategic plan prepared by the Netherlands Board of Tourism, and has been noted through annual tourism statistics to be a persistent problem since 1991 (NBT, 1996; CBS, 1998a; Van Polanen Petel, 2002).

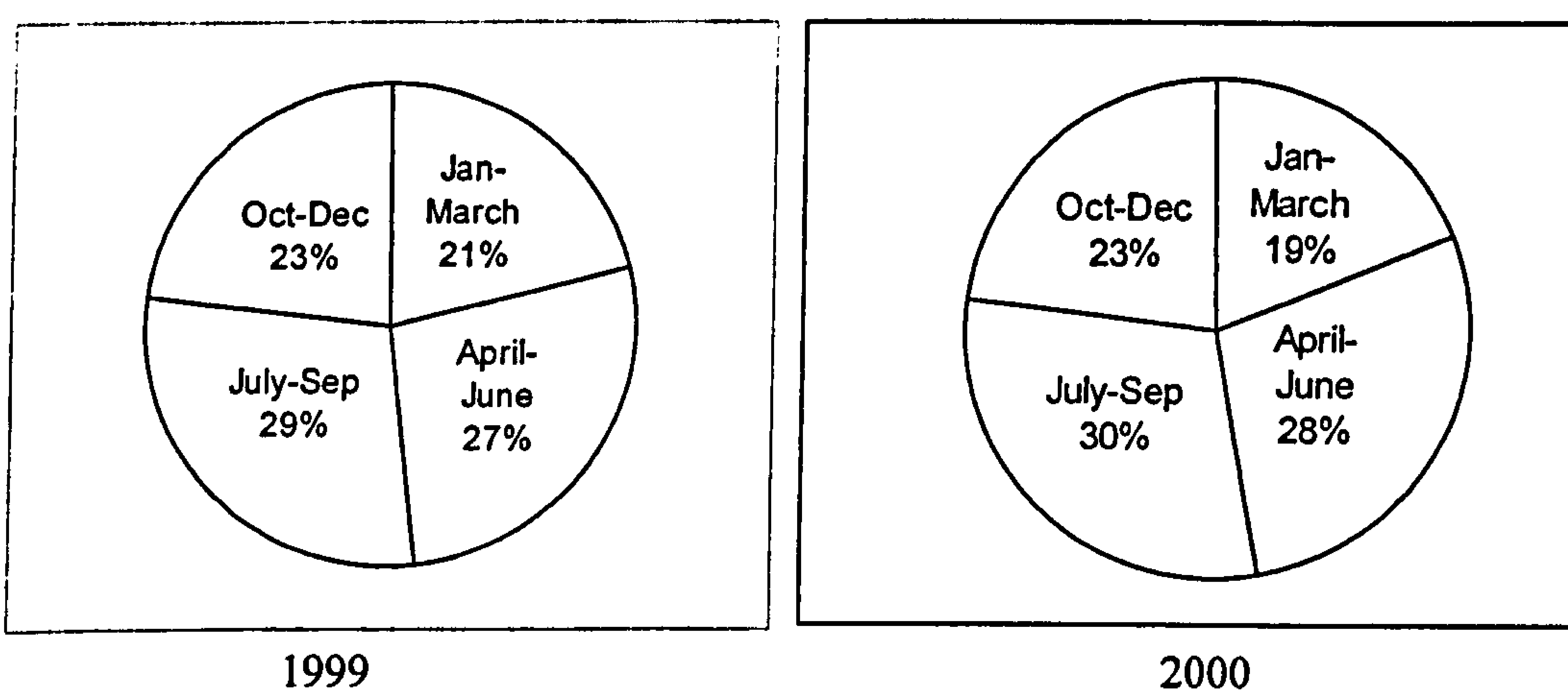
As consecutive tourism surveys indicate, July and August have traditionally been the busiest months in terms of both international visitors and the nights spent in serviced accommodation establishments across the country, while the period December-February has repeatedly accounted for the lowest volume in both indicators (CBS, 1998a). In the year 2001, for example, more than 60% of all international visitors came to the Netherlands in the summer season extending from April to October. While the quietest period was between December and February with just about 18% of all international visitors, August, when visitor arrivals reached their peak, attracted 1.2 million visitors, accounting for nearly 13% of the overall total alone (Van Polenen Petel, 2002).

The seasonal fluctuation of international visitor arrivals to the country is related to several factors including unreliable weather conditions in winter, the relatively fewer sunny days in spring and autumn, and school holidays that allow potential visitors more free time in summer (NBT, 1996). The popularity of coastal destinations among the neighbouring countries is also noted to result in more visitor arrivals in the summer period than in winter. As Van Polenen Petel (2002) argues, a considerable amount of visitors from Germany, Denmark and Belgium travels to seaside destinations in the provinces of North Holland, South Holland and Friesland mainly for the purpose of holiday-making and recreation, hence tends to travel in summer months.

Amsterdam, on the other hand, as the gateway destination of the country, enjoys relatively better-balanced visitor arrivals throughout the year. Even though the summer months are also popular among international visitors to Amsterdam, the contrast between the summer and winter months is not as sharp as the countrywide diffusion of tourism. As Figure 6.24 shows, the seasonal spread of overnight staying visitors in Amsterdam very much resembles the previous figures used to indicate the seasonal distribution of international visitors in London and Istanbul.

In Amsterdam too, the summer season extending from April to September attracted more than half of the overnight staying visitors in both 1999 and 2000. Despite the consistent popularity of July and August, especially among the international visitors, August seems to be losing its status as *'the traditional peak-month'* with its share decreasing gradually from 13% in 1993 to 10% in 2000 (VVV, 1999c and 1997; Het Amsterdamse Bureau voor Onderzoek en Statistiek, 2001). This is partly because of the promotional campaigns of the Amsterdam Tourist Board (VVV) targeting a counterbalance between different seasons with more arrivals and overnight stays in the winter months. Nevertheless, a recent report prepared by the Board foresees that a better-balanced spread of visitors will not occur in the near future, while the city is expected to continue to attract more domestic and international visitors in spring and summer (VVV, 2000a).

Figure 6.24. Seasonal Distribution of Overnight Staying Visitors in Amsterdam



Source: VVV (2000a) and Het Amsterdamse Bureau voor Onderzoek en Statistiek (2001).

The statistical information on the market segments staying on different weekdays in Amsterdam offers another perspective to the discussion of crowding in the city and the use of public spaces by visitors. Table 6.21 displays the daily spread of visitors staying in 4 and 5 star hotels in 1998 and 1999. As the table suggests, such high rank hotels manage to attract almost equal proportions of visitors throughout the week, albeit with increasing guest numbers towards the weekend. While Saturdays had the highest share with 16% in 1999, occupancy rates fell to a minimum on Sundays in both years.

The balanced daily spread of hotel guests is noted to be a result of differing travelling preferences among various market segments (VVV, 2001a). Business travellers, who accounted for 31% of all staying visitors in 1999 (VVV, 1999b), tend to use accommodation services on the first four days of the week -*i.e. Monday to Thursday*- as opposed to the concentration of leisure travellers on Fridays, Saturdays and Sundays. While the highest shares of business travellers among hotel guests were achieved on Tuesdays and Wednesdays in 1999 *-i.e. 70% on both days-*, 68, 74 and 60% of all guests of the serviced accommodation establishments on Fridays, Saturdays and Sundays respectively were leisure travellers in the same year (VVV, 2001a). In other words, the contrasting concentration of business and leisure travellers on different weekdays seems to counterbalance the daily spread of overnight staying visitors in Amsterdam.

Table 6.21. Daily Spread of Visitors at 4 and 5 Star Hotels in Amsterdam

	1998	**1999**
Monday	13%	13%
Tuesday	14%	15%
Wednesday	14%	15%
Thursday	14%	15%
Friday	16%	16%
Saturday	17%	16%
Sunday	12%	11%
TOTAL	100%	100%

Source: VVV (2001a).

In the light of the above information, one can argue that the seasonal distribution of visitors in Amsterdam does not pose a threat to the carrying capacity of the tourism sector. In fact, while the statistical information on seasonal patterns of tourism demand in Amsterdam has been covered in the consecutive tourism strategic plans of the Amsterdam Tourist Board (VVV, 1994, 1997, 2000a and 2002), the policies regarding carrying capacity issues have concentrated on spreading visitors across the city and towards the outer fringes rather than throughout the year. In the most recent of these plans, it is noted that the VVV has been co-operating with the City of Amsterdam and the major stakeholders in the tourism sector in order to encourage the districts outside the historic core and the surrounding towns and cities to develop and promote new tourist attractions within their boundaries (VVV, 2002). It is argued that, only through such initiatives, will the target of 3% growth in the annual visitor numbers be achieved with no further congestion caused in the inner-city area. In the report, the attraction developments in East Amsterdam built under the project scheme entitled *"Plantage aan het Water- Development along the Water"* are shown as good examples of how a spatial spread of tourism can be further facilitated.

The interview results do not reflect any other view on the seasonality of tourism in Amsterdam apart from a non-peak fluctuation of visitors across the year. Although there are 7 quotations attached to the code *'seasonality'*, the four interviewees, who were chosen to represent various tourist attractions of the city, referred to the seasonal demand patterns experienced by their own organisation rather than the appraisal of the matter as a sector-wide issue. In fact, the conflicting concerns of these four interviewees regarding the quiet seasons, affirm the necessity of attracting diverse market segments in different tourist seasons in order to achieve a balanced distribution of overall visitor arrivals.

As opposed to winter being shown as the most busy period of the year for the visitors travelling to attend stage shows such as musicals, concerts and theatre plays, spring and autumn are said to be the best time of the year for conference and exhibitions, special events and shopping. The remaining three quotations shown below refer to the necessity to consider seasonal visitor arrivals in tourism plans and to concentrate on winter months in marketing activities, if more hotels are developed and more visitors are targeted by the local authorities in the future.

> *"We do have some seasonal fluctuation of visitor arrivals to Amsterdam... At the moment, the high season for Amsterdam is spring when tulips are flourished. From May to July is again a high season. After August, the low season starts, while business tourism starts to increase. Corporate business tourism is especially high in October and September until December" [Amsterdam Interview: 11].*

> *"The Easter break, the end of March, the beginning of April and the beginning of September are the high seasons for our members (shop owners). But then again, there are tourists all year around in Amsterdam" [Amsterdam Interview: 10].*

> *"The main thing, which we overlook, is that we do not have enough shows and performances in summer, although that is when tourist season reaches its peak level. In summer, theatres are closed... There are now plans to change this situation. They are running some activities in summer and charging more than they do in winter. Because they know that the majority of the attendants would be tourists. In this sense, we can talk about a seasonal fluctuation of arts events in Amsterdam" [Amsterdam Interview: 9].*

To conclude, it has to be noted that seasonality is a complex phenomenon and requires a more detailed analysis than just the investigation of finite statistical data. The nature of seasonality is complicated by the interdependence of those factors causing seasonal fluctuations in demand and the varying attitudes and beliefs of both destination marketers and planners, and the manifold market segments in respect of the problems generated by overcrowding in high seasons (Butler and Mao, 1997). When seasonality is examined for its influence on the carrying capacity of a destination, its social, environmental, physical and economic impacts further complicate the analysis, along with the difficulty of determining the use of public space by residents and visitors separately. Yet, the brief discussion on the seasonal variations in demand in the case study cities confirmed by the interview findings, helps the argument that London, Istanbul and Amsterdam embrace a wide range of market segments in their visitor profiles and seem to be *'all-year-round'* destinations.

It is also seen that through strategic planning and marketing, cities are more likely to distribute their manifold market segments evenly across the year than those holiday resorts, where the attractiveness of the destination is strongly related to particular seasons. Some examples of such policies aiming to offset the problems caused by seasonality, as suggested by Butler (2001), include: attracting short-break holiday-makers from the neighbouring countries and regions throughout the year; concentrating on domestic visitors and business travellers in low seasons; establishing additional seasons through the introduction of special events and festivals; using differential pricing and tax incentives on a temporal basis and; encouraging the staggering of holidays. Some of these policies will be further evaluated in the next chapter, when the tourism network and the marketing of Amsterdam, Istanbul and London are examined.

6.4.4 Quality of Life

Quality of life is such a difficult and evasive term that the analysis of the concept in any location would clearly require separate and interdisciplinary research aiming to elucidate the intricate interrelations between its manifold components. From an economic point of view, it refers to the total income generated within the community and the fair apportionment of this income among the community members, while it is perceived as optimised customer satisfaction established through standardised product and service quality in the field of marketing. Moreover, ecologists and geographers review the term within the concept of sustainable development, which itself is a complex research topic mainly evolving around the notion of protecting the green environment. In sociology and anthropology, quality of life suggests inhabitant attachment and adaptation to the community and its social environment.

An attempt to measure the quality of life from the perspective of tourism is even more complicated, as the parties involved with the perceived image of a destination are not only concerned with existing and potential visitors from diverse generating markets, but also residents, businesses, sector stakeholders and local authorities. Furthermore, in tourist destinations, there is a reciprocal relationship between the sector and quality of life. While tourism may raise the profile of a destination through the development of new tourist attractions and recreation sites, the sector may also deteriorate the living standard especially if the destination reaches the stages of saturation or decline in its life-cycle and becomes adversely affected by overcrowding and ill-planned tourism development. The use of tourism as a revitalisation tool in derelict urban fringes in many countries is a noteworthy example to how the sector can play an important role in raising the overall quality of cities and their run-down districts (Law, 2002).

Another problem with the concept of quality of life in city destinations is the altering standards of living from one district to another. Tourist zones, where landmark attractions, heritage sites and major tourism organisations exist, usually benefit from the concentrated efforts of local authorities to conserve and provide adequate infrastructure facilities in such areas, whereas urban fringes often get neglected or are not placed at the top of the list of priorities in urban development programmes. To a certain extent, inner-city centres and tourist zones are treated as the shop-windows of urban areas. Therefore, the liveliness of tourist zones is usually enriched by policies on street decoration, re-arranged traffic-flow, protected buildings and monuments, pedestrianisation schemes, and public space for entertainment and recreation. Nevertheless, there are also districts where mass tourism may pose a threat to the maintenance of quality standards. As Burtenshaw et al. (1981) stress, visitors may damage, by their presence alone, the sites that they have come to experience. As the authors further add, while it is a difficult planning task to achieve a balance between congestion and conservation in tourist zones, city centres would become *'lifeless exhibits'* without the money spent on developing tourism and the stable visitor flows that come to experience the tourism offers.

Given such difficulties, then to apply the concept into real instances by measuring quality of life in practice is still possible, albeit with a limited control over its manifold components, through investigating the diversity of economic and social activities in the city, the effective use of public space in different urban functions, the level of civic pride felt by residents and, the overall competitiveness of the city in international business environments. To do this, a combination of factors ranging from air quality management to sufficient infrastructure services, from unemployment rates to total waste management can be compared with the optimum and standardised targets approved anonymously. Local Agenda 21, prepared by the member countries of the United Nations in 1992, is a good example of the uniform guidelines for sustainable development in cities and the maintenance of quality of life for city residents (Corporation of London, 2000).

Another example is the City Development Index (CDI) developed again by the United Nations (UNDP, 2001). By measuring relative development, liveability, sustainability, disadvantage or poverty, congestion and inclusiveness levels of urban areas with the use of a combination of indicators, CDI ranks cities according to their level of development. According to UNDP, the CDI index suggests that European cities suffer mainly from unemployment and slow progress in infrastructure improvement, whereas they are far too advanced in waste-recycling, social security programmes, heritage conservation, decentralisation of urban economic activities, partnership establishment for sustainable development and the use of technology in decision making in comparison to their counterparts in Africa, Asia and South America.

Ideally, when measuring quality of life, influential factors can be split into two categories: objective and subjective indicators. While objective indicators refer to tangible elements such as unemployment rate, affordability of housing, accessibility to services and community crime rates, subjective indicators include intangible elements such as happiness and level of satisfaction with various aspects of life. Although it could have been more distinctive to conduct a questionnaire survey with residents and visitors to analyse how they conceive the quality of life of the city they either live in or visit (Gilbert and Clark, 1997), due to the research limitations, only some objective indicators of each case study are gathered from the available statistics in this section (*see Table 6.22*).

By looking at the first four indicators in Table 6.22, one can easily argue that Istanbul is an urban area in a developing country, whose Gross Domestic Product (GDP) per person is almost a fifth of its European counterparts' and whose annual population growth is much higher than the other two cities. For the unemployment rate, however, Amsterdam scores higher, while London and Istanbul share the same rate of 7.5%. If feeling safe in a city is an important indicator of its living standard, Amsterdam can be said to be less secure with a higher rate of recorded crime in its resident population *-i.e. a recorded crime for nearly every 6 persons in 2001-*, in comparison to nearly 8 and 17 persons in London and Istanbul respectively.

It would be dishonest to draw conclusions on comparative levels of living quality from such limited statistical information. Various factors causing dilemmas for effective city management, such as traffic congestion and lack of appropriate infrastructure services, have already been discussed in the previous sections (*see sections 4.6.2, 6.3.2 and 6.3.3.1*). In this section, therefore, the related codes created when analysing the interview findings, are linked to the concept of quality of life with a particular emphasis on the *'tourist destination'* characteristic of the cities. So, while air quality and housing policies are undoubtedly related to living standards in each city, the figures shown below focus more on those tourism-related indicators of quality of life, such as crowding, safety and infrastructure services.

The codes *'community acceptance of tourism'*, *'educating locals'*, *'educating staff'*, *'educating visitors'* and *'educating stakeholders'* are also included in the figures. The reason for the use of the first of these codes is to understand how the interviewees think the socio-cultural capacity limits of the cities have been affected by tourism. It is assumed that if tourism development were planned appropriately through the collaboration of all stakeholders, there would be no detriment to the life styles and activities of the local community. Similarly, if tourism capacity limits are surpassed and tourism-related overcrowding disturbs the everyday life of the host community, then resentment and opposition towards the sector would arise among the residents, as they may start to feel they cannot use the services and offers of their own city as much as visitors do.

Table 6.22. Some Indicators of Quality of Life in the Case Study Cities

	Amsterdam	London	Istanbul
Population*	735,328 (2002)	7,187,300 (2001)	9,119,315 (2000)
Population Density (per km²)	4,438 (2002)	4,554 (2001)	1,928 (2000)
Annual Growth in Population	0.1 % (2002)	0.3% (2001)	2.9% (2000)
GDP (per person)**	US$ 22,000 (2000)	US$ 24,303 (1999)	US$ 4,416 (2000)
Green areas & parks*** (% to overall urban land-use)	14.4 % (2000)	31.5 % (2002)	12.4 % (2001)
Number of Hospital Beds	5,630 (2000)	N/A	34,616 (2001)
Number of Health Personnel ****	3,376 (2002)	55,810 (1999)	37,552 (1999)
Number of Colleges & Universities	11 (2001)	40 (2001)	26 (2002)
Students at Higher Education	65,758 (2001)	337,896 (2001)	210,157 (2002)
Unemployment Rate	9.3 % (2002)	7.5 % (1999)	7.5 % (2000)
Recorded Crime Offences by the Police	128,734 (2001)	909,091 (1999)	541,867 (2002)
Total Solid Waste***** (tonnes)	793,038 (2001)	18,100,000 (2002)	5,562,782 (2000)

* The figures refer to inner-city population in all cities.

** At current prices in the years shown respectively.

*** Total urban land includes residential areas, transportation networks, roads and stations, business districts, new developments, unusable and derelict sites, water (canals, rivers and sea), green areas and parks and land used for agriculture. In London, the percentage includes the Greenbelt area surrounding the Greater London and the Metropolitan Open Land.

**** Includes specialists, GPs, dentists, registered nurses, hospital attendants and midwives.

***** Includes municipal waste disposal, commercial and industrial waste and, construction and demolition waste. In Istanbul, the figure is estimated according to the average total waste per person per year.

Sources: Het Amsterdamse Bureau voor Onderzoek en Statistiek (2002); Government Office for London (2000); DIE (2002a and 2002b); GLA (2002a and 2003); Office for National Statistics (2001 and 2002); T.C. Saglik Bakanligi (2002); OSYM (2003) and IBB (2001).

With regard to the use of the other four codes *-i.e. educating visitors, locals, stakeholders and staff-*, the intention is to pinpoint the importance of healthy relationships established between the members of the sector for the sustainable development of tourism. As Haywood (1997) argues, visitors can only enjoy the products offered by destinations if residents and tourism staff feel good about welcoming and serving visitors. Similarly, visitors should respect the traditions and culture of the local community. Although some tourism problems in major tourist zones can be overcome by visitor management policies, educating visitors about the place they are going to visit and its capacity limits pre-arrival and during their stay, could help minimise the deterioration of attractive and distinctive aspects of the destination. The concerns raised by the interviewees in relation to such issues are considered to give insight into the perceived quality of the cities and what can be done to raise their overall profile.

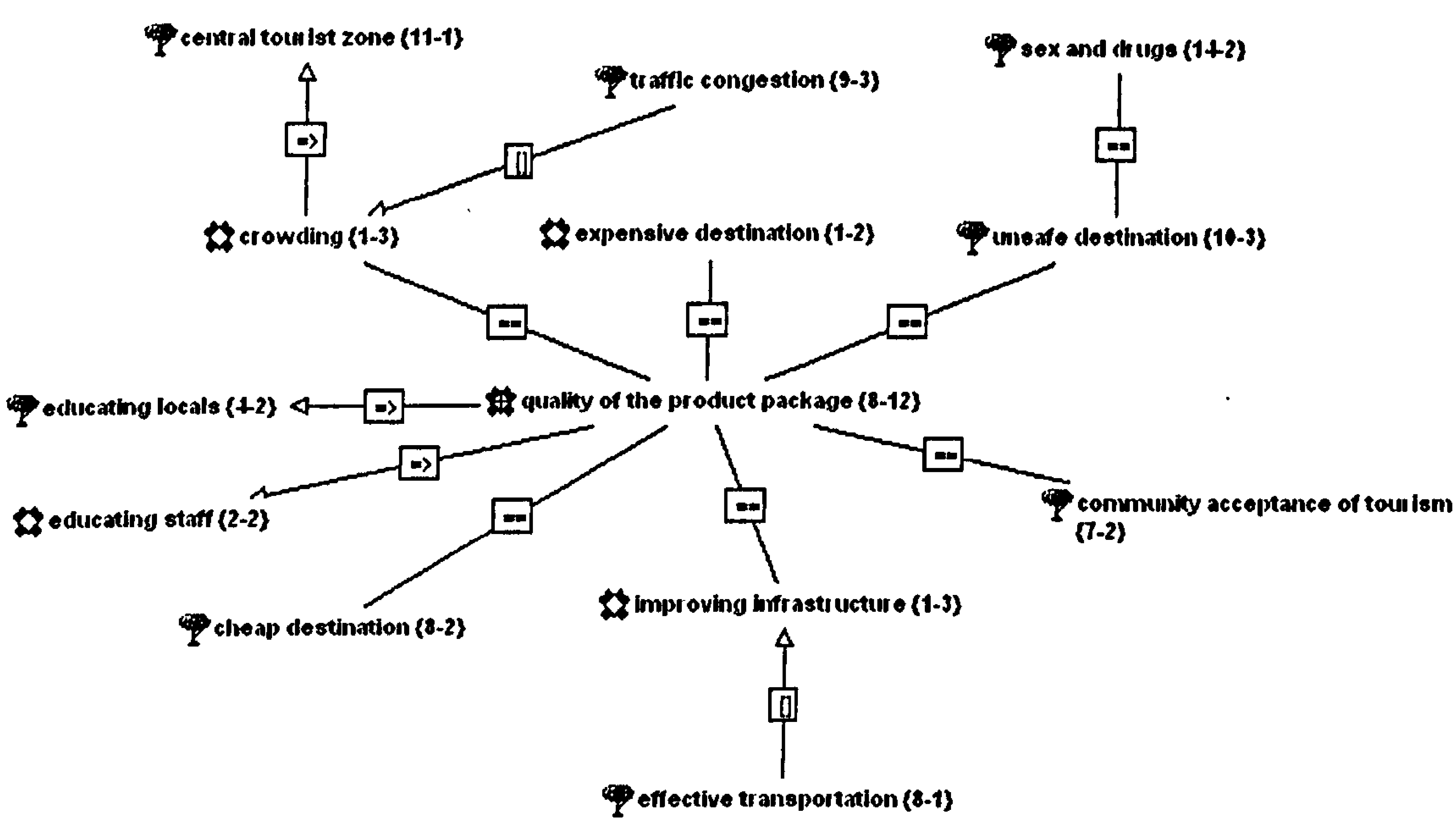
6.4.4.1. Quality of the Tourist Product Package in Amsterdam

Figure 6.25 shows the connection between several codes and the code entitled *'quality of the tourist product package'* in Amsterdam. While the codes that have negative impacts on the destination and its product package, are listed on the top half of the figure, those which support the city's appeal as a quality destination are in the bottom half. Among the codes with a contradictory relationship with quality, *'sex and drugs'*, *'unsafe destination'*, *'central tourist zone'* and *'traffic congestion'* are those mentioned most by interviewees. On the positive front, the city is not considered to be expensive, as the quotations attached to the code *'cheap destination'* outnumber the quotations for *'expensive destination'*. The codes emphasising the adequate infrastructure services and ease of transportation within the city centre are, in the meantime, only found in the interview findings from Amsterdam and hence are missing in the figures of the other two cities. As various quotations attached to these codes were already discussed in the previous sections, they will not be repeated here.

The thoughts of the interviewees about the overall quality of Amsterdam as a tourist destination are gathered under the code *'quality of the product package'*, which incorporates 8 quotations. Most of the interviewees expressed their views on the issue from the perspective of the sub-industries of the tourism sector in which the organisations they were representing are found. Hence, while the convention and exhibition offers of the city are considered to have achieved desirable quality standards along with the activities and facilities serving the cultural tourism market, the quality of shops in tourist zones and the accommodation establishments, particularly the ones at the lower end of the market, are thought to be in need of further improvement. Two interviewees, who were chosen from the local authorities responsible for the city-wide management of tourism in Amsterdam, mainly offered opinions regarding the maintenance of quality-related issues in tourism and urban management plans. In total, six interviewees found the quality of Amsterdam's tourist product package in good order, as opposed to two interviewees, who thought that further action needs to be taken to upgrade the tourism facilities and services of the city. Examples of these quotations are as follows:

> *"We put special emphasis on quality in our strategic marketing plans... It is not just about promotion. It also includes product development and the quality of tourist products... It is necessary to make sure that the tourist product meets up with the expectation of visitors... So, promotion, product quality and product development are all intertwined. If visitors are not satisfied with the product, promotion cannot help to guarantee that visitors would be coming non-stop" [Amsterdam Interview: 2].*

Figure 6.25. Quality of the Tourist Product Package in Amsterdam



> *"(As municipality), we are dealing more with the recreational needs of the locals. So, planning more parks and recreation areas is our job. I think, right now, the living quality of Amsterdam for its inhabitants is pretty good. We have enough entertainment and recreation places, pubs, restaurants, theatres and all sorts of things. Also, the municipality has a very strong policy about the quality of open-space in Amsterdam" [Amsterdam Interview: 8].*

The code *'community acceptance of tourism'*, meantime, is attached to 7 quotations. Most of the interviewees shared the view that there is no opposition towards tourism among the residents of Amsterdam and that the well-known *'tolerant and friendly'* characteristic of the local community is appreciated by visitors. The only concern regarding the conflicting standing of the inhabitants and local planners regarding tourism development is noted to be the result of the local authorities' attempt to bid for hallmark events. While the residents seemingly disapprove of the hosting of short-term and one-off special events in their city, another interviewee noted that some outer districts choose not to build new attractions and other tourism establishments in order not to cause tourism-related congestion and pollution in their, mainly residential, areas. Two interviewees also stressed that too much emphasis on sex tourism in the marketing efforts of the local authorities would not only further deteriorate the image of the city, but may, as well, result in resentment of the local people towards the sector. Some of these quotations are as follows:

> *"The locals of Amsterdam are quite friendly with visitors. That is something to do with being a tolerant city. Especially, Americans find it quite surprising how tourism staff in restaurants and so on, can be so polite. This is because people working in restaurants, and even taxi-drivers, are all well educated... Some local people may be dissatisfied with the crowds especially in high seasons... But they know that we profit from this industry... Right now, everybody appreciates the benefits of tourism, so I do not think people are against tourism and the idea of promoting the city as a tourist destination" [Amsterdam Interview: 3].*

> *"Some years ago, Amsterdam bid to host the Summer Olympic games. Then, the proposal was opposed by a large number of people living in Amsterdam. They even started riots in the streets. They were doing demonstrations against it... The strategy of Amsterdam to attract the Games was used against the orchestrated competition from the other candidate cities, which were more ready to host the Games. No one, of course, believed that the city genuinely wanted to host the games, as everybody knew that the locals were against it. The situation is no different today. I think people of Amsterdam are used to live with tourists, but they would not support projects, which would mean larger crowds in the city centre" [Amsterdam Interview: 6].*

> *"There are some people who are worried about the growth of tourism in the direction that there would be more visitors coming for the Red Light District, and not for other attractions. Amsterdam is now hosting the Gay Games, for example. Would that strengthen the image of Amsterdam as a tolerant city or would it mean that Amsterdam becomes a destination of sex tourism? At the moment, the Municipality and the tourism organisations seem to support the Games. They will clearly benefit from it financially... But, whether locals would be happy with the city's future growth in sex tourism, is debatable" [Amsterdam Interview: 14].*

The opinions of interviewees regarding the education of local residents and tourism employees on the benefits of the sector and the maintenance of certain quality levels are grouped under the codes *'educating locals'* and *'educating staff'*, which were attached to four and two quotations respectively. The four quotations of the first code, which include the expressions of those interviewees selected from public authorities and partnership organisations representing the sector as a whole rather than one of its sub-industries, stressed the fact that they run regular tourism education programmes for local residents. While it is also mentioned that residents, in general, are aware of the economic, social and political benefits of the sector for Amsterdam, the education programmes are designed to encourage people from different social backgrounds to participate in various cultural, recreational and entertainment activities offered by the sector. The following quotation summarises such views:

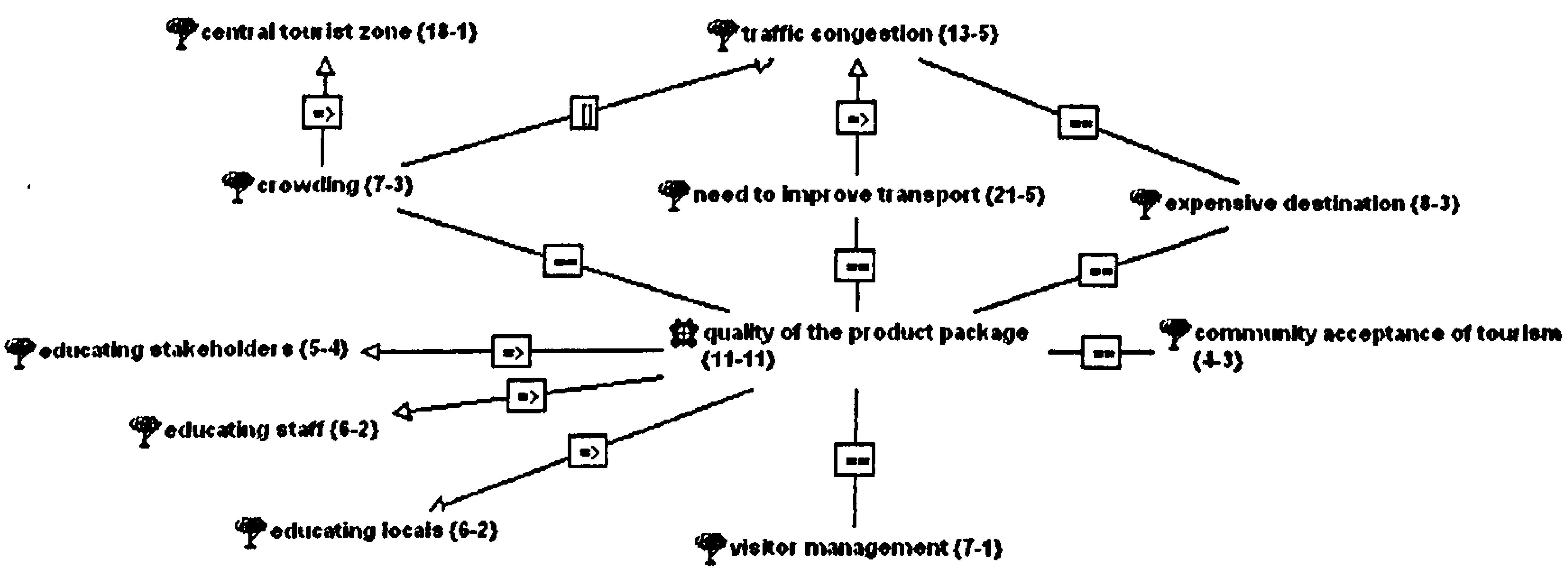
> *"I think people appreciate the industry and its offers, which appeal to residents as much as to visitors... We try to encourage people to go to museums and theatres... That is why we have education and training seminars. We just did something for immigrants last week. We try to encourage them to participate in events. Similar works are also done for schools. We organise Art Days at schools. We take students to museums and other arts events. This way they learn about tourism by becoming tourists themselves" [Amsterdam Interview: 9].*

6.4.4.2. Quality of the Tourist Product Package in London

In London, the network of the codes displayed around the centre code *'quality of the product package'* is slightly different than Amsterdam. As Figure 6.26 shows, the triangular connection between the codes *'crowding'*, *'central tourist zones'* and *'traffic congestion'* stands as a combination of quality diminishing factors in London as well. The code *'unsafe destination'*, meantime, does not appear in the figure, as the code is attached to those quotations from the Amsterdam and Istanbul interviews only. On the other hand, the code *'expensive destination'* captures relatively higher number of citation in London *-i.e. 8 quotations-* than in the other two cities. Similarly, the infinity of remarks for the code *'need to improve transportation' -i.e. 21 quotations-* shows how much importance the interviewees put on the ease of movement of visitors within the city centre. Finally, the code *'visitor management'*, which is an additional code created during the analysis of the London interviews, is included in the figure. This is not to suggest that visitor management applications are only practised in London. But, that only the London interviewees stressed the importance of the concept for the overall quality of the destination, which denotes broad awareness of visitor management policies and plans and the practice of such policies by tourism stakeholders. The following quotation offers some insight into the matter:

> *"As you would notice, we have a new section in our strategy plan on visitor management. We recognise that there are some main tourist areas, which to a certain extent, suffer from some negative impacts, as large number of visitors go there... People would not stop going to the British Museum. But we try to encourage people to go nearby other tourist attractions... We expect people to come to London, but it is in our interest to move the economic benefits around the city and to help those less-known areas to benefit from tourism flows. This will happen, when the products are right. It is not right enough in some parts at the moment to increase the visitor numbers, and to encourage them to spend money... In such areas, we need to work on improved streetscape, improved investments on transport, working on environment to look better and so on" [London Interview: 15].*

Figure 6.26. Quality of the Tourist Product Package in London



The code *'quality of the product package'* is linked to a relatively higher number of quotations in London than Amsterdam. Most of the 11 statements on the subject were about the exquisite quality standards achieved by the tourism organisations and the *'quality-oriented'* policies of city-wide organisations to maintain and improve the current achievements in the long-term. While 4 interviewees stated that they persistently include strategies on quality improvement in their organisational policies and plans, the same number of interviewees seemed to be confident about the satisfactory quality standards ensured by the visitor attractions and other tourist services in London, which, in most cases, are said to meet the expectations of visitors. The criticisms raised by three interviewees regarded poor service standards of some accommodation establishments, especially at the lower end of the market. Section 6.4.1.1 lists two of these quotations concerning the negative influence of budget hotels on the overall quality of the tourist product package. The following examples, meantime, provide a broader perspective on the overall quality of London as a tourist destination and the policy approaches of tourism organisations on the subject:

> *"I suppose, most of (the visitor attractions in London) are the quality end of the market. These are not fly-by-night organisations. They are responsible from a part of the good and great of the country... People know that there is basically a quality performance when they come. We are aiming to back that up with a benchmarking exercise both on the quantitative side, which is about how many people going through your door, how many went into your restaurant and how much money do you take of them, and also on the qualitative side. So, people can see how well you are doing" [London Interview: 4].*

> *"(We) aim to lead the industry towards better business practices, improving quality and, more specifically, to support members in order to make their businesses more efficient and more profitable" [London Interview: 18].*

With regard to the attitude of Londoners towards tourism, the interviewees expressed dissimilar views. Among the four remarks gathered under the code *'community acceptance'*, only one interviewee mentioned that the local community is fairly satisfied and happy with the sector and its development in the city. Another interviewee argued that there is a certain level of resentment towards tourism in major tourist zones, which is considered mainly to stem from congestion and pollution caused by large visitor flows. Another observation was about the objection to flag ship projects in the outer districts, where tourism is used as an initiative to boost local economy. This interviewee stated that most of the conflicts between urban developers and the resident community in such areas derive from misunderstanding tourism and its benefits.

Despite such varying interpretations of the concept by the interviewees, their views seemed to have brought forth a consensus on the fact that London is not likely to encounter severe threats of community rejection in the way that some traditional tourist towns, such as Bath and Canterbury, have experienced in the past. Moreover, the interviewees emphasised the importance of long-term tourism policies and the employment of education programmes for the sustainable development of the sector, which would, consequently, secure minimal restrictions on the use of public services and space used by local residents. The following quotations are examples:

> *"We do run regular visitor surveys... It is noted in our survey findings that majority of the UK citizens including the residents in London, are satisfied and happy about the tourism industry in London and are aware of the economic impacts of the industry" [London Interview: 1].*

> *"I do not think we would experience conflicts between the resident population and visitors in the short-term... For two reasons: One, a big city can accommodate more outsiders than small towns... Second, we have not reached, what I can say realistically, our optimum visitor numbers in some areas. A lot of local people do not really have any day-to-day contact with visitors... As you know, Tower Hamlets is the Jack the Ripper's county, and there are some private companies who do walks there at night... These companies are very unaware about the local resident issues. They stand outside of somebody's house at 9 o'clock at night, and that person is affected by fifty or sixty people staring at his house... As a result, complaints arise... So, we have got something there, but it is very minor. Nothing like the issues coming out in Bath or in Canterbury" [London Interview: 2].*

> *"Locals' attitude towards tourism varies, I think. In our first tourism strategy, we consulted people. We had a very good response from the locals... What we found out was that they have mainly misread or misunderstood what our tourism strategy really says. They perceived the word 'tourism' as something, which would bring along problems... They were concerned about the congestion, noise, etc... What we should not overlook is that many people live in (London), because they like it. They like bars, the nightlife and anything associated with the industry... They moved here, because they like the vibrant life" [London Interview: 15].*

As the above shown quotations indicate, the London interviewees seemed to acknowledge the necessity of tourism education and regular training programmes as an imperative component of tourism development. Therefore, during the primary data analysis, the codes *'educating locals'* and *'educating staff'* were attached to 6 quotations each. Similarly, the code *'educating the stakeholders'* consists of 5 quotations. The statements grouped under the first two codes were mainly about the need to educate local residents and tourism employees on the benefits of tourism especially in hectic tourist zones. Some interviewees also mentioned that their organisations run regular vocational training programmes for local residents, so that they can achieve appropriate skills to find jobs in new tourism investment projects mainly developed in the outer boroughs. On-the-job training courses for tourism employees are also noted to be arranged by the visitor attractions participated in this research. The interviewees' statements listed under the code *'educating the stakeholders'*, meantime, focused on the efforts to bring the sector stakeholders together and to educate them to establish a collaborative approach towards tourism management and development in the city. Some of the quotations attached to these three codes are shown below:

"One of our main strategies is all about training local people, so that they can get jobs in tourism. Then, we can go to tourism operators and say 'we have got a solid core of local residents who are available to work, who have been trained'... So the regeneration process you are bringing in is tourism and to have people working from locally" [London Interview: 2].

"At the moment, we are in the middle of a major, government funded, initiative to improve employment practice in the hospitality and tourism industries, called 'Excellence through People'. This project aims to get visitors attractions and other tourism establishments send their staff to training programmes on customer care. It is all about visitors going into any tourism establishment, and getting better services and better experiences" [London Interview: 18].

"We regularly organise seminars and meetings for the stakeholders to let them know about what we are doing. We try to convince them about the benefits of joint-marketing activities. So far the support is enormous... The members understand the reasons why they should get together" [London Interview: 12].

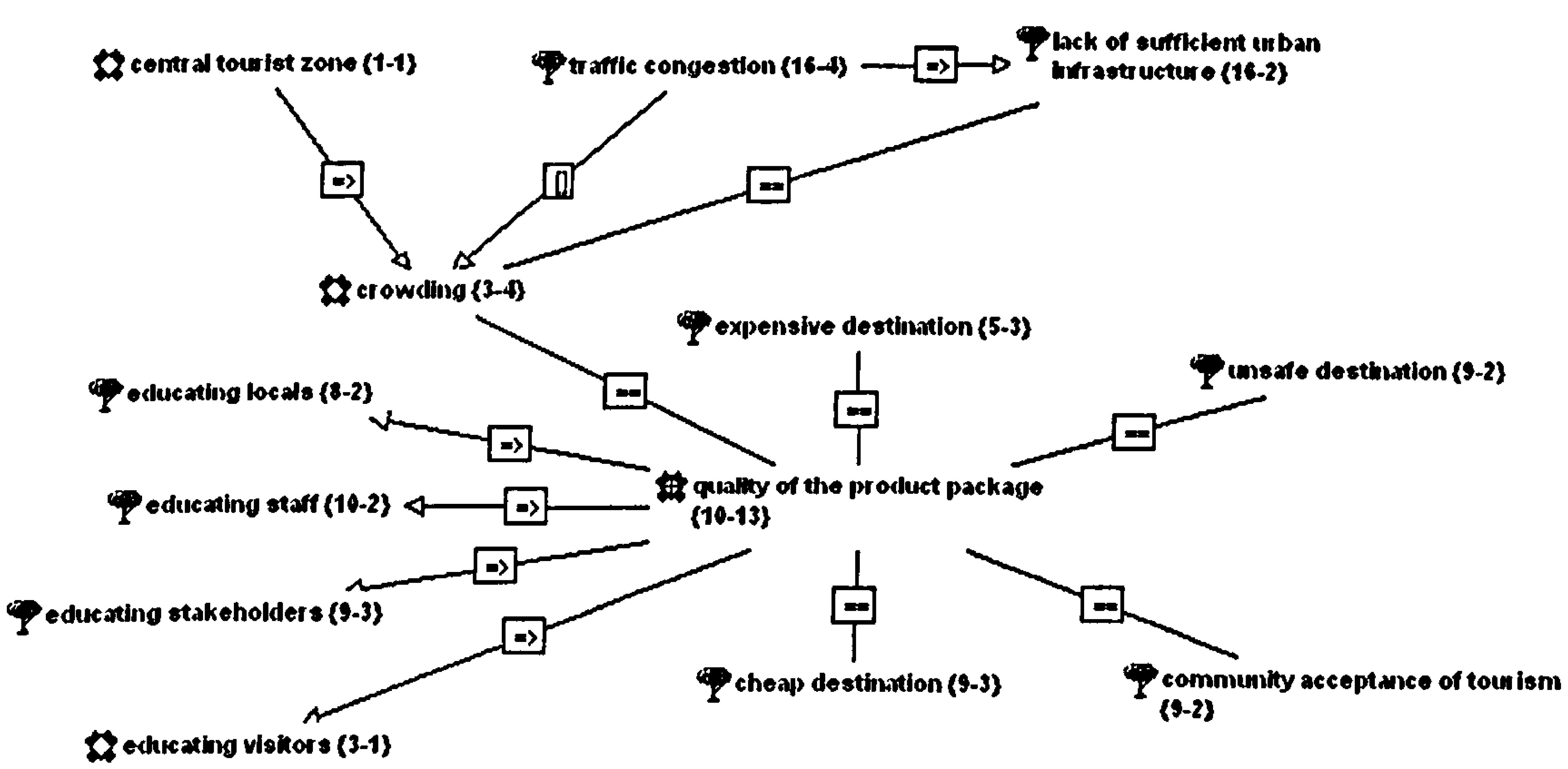
6.4.4.3. Quality of the Tourist Product Package in Istanbul

During the analysis of the Istanbul interviews, almost all of the codes created for the examination of the quality-related aspects of tourism in the case study cities, were used. As Figure 6.27 displays, the city is considered to be both an expensive and a cheap destination, albeit with a relatively higher number of quotations for the code *'cheap destination'*. Although traffic congestion and lack of appropriate infrastructure facilities are not solely caused by tourism, but are mainly the consequential outcomes of the overall wellbeing of the country in general and the urban economy in particular, numerous statements attached to these codes *-i.e. 16 quotations for each-*, expose their adverse effects over effective utilisation of the sector. On the other hand, Istanbul seems to benefit from its *'multi-centred'* characteristic (*see Section 6.4.2.2*), as the codes *'crowding'* and *'central tourist zone'* are attached to very few quotations compared to the findings of the other two case studies. Finally, the code *'unsafe destination'* embraces such views of the interviewees on how negative image perceptions cause misconception of the city and its tourism sector in visitor generating markets.

The expressions of the interviewees on the overall quality of Istanbul's tourist product package consisted of opposing opinions. Among the 10 quotations attached to the code *'quality of the product package'*, only three were about the proper standards accomplished by tourism organisations. These interviewees mainly stressed how the richness and diversity of the tourist products enhance the profile of Istanbul as a tourist destination. While 4 interviewees argued that local authorities ignore the necessity of quality-related strategies and plans for sustainable tourism development, other interviewees were concerned about the decreasing quality of visitors, who demand cheap and basic services and, as a result, lead some tourist organisations to lower their prices and service quality accordingly. As the following quotations suggest, such alterations in service standards cannot be attributed only to the lack of vision in individual tourism organisations, but are also related to the insufficient efforts of city-wide, and even nation-wide, tourism authorities to maintain existing visitor markets and to attract high spending and long-staying visitors.

> *"Some 5-star hotel establishments, which were built with government initiatives several years ago, now offer the standards of a two-star hotel. When there was a decrease in visitor numbers, they lowered their prices and eliminated the provision of some crucial services. Ill-managed organisations are the main sources of such poor services and products. This situation can only be improved by educating people" [Istanbul Interview: 9].*

Figure 6.27. Quality of the Tourist Product Package of Istanbul



> *"The services provided by the accommodation establishments, restaurants, cafes and other entertainment outlets meet the expectations of the current tourism demand in Istanbul. Since most of these tourism organisations are registered by the Ministry of Culture and Tourism, which regularly monitors and reviews their service standards, we can easily say that the products are offered at good quality. However, some of the accommodation establishments are registered by the Municipality. They are mostly budget-class hotels. There*

are some concerns about the service quality provided in such establishments" [Istanbul Interview: 11].

"The quality of an average tourist is gradually decreasing. This is felt by tourism organisations across the country, and has its impact on Istanbul, too. Why does it happen? Because, tour operators constantly decrease their tour rates as soon as they face some competition from other destinations... As a result, they end up with large sums of deficit in their budget at the end of the tourism season and ask for government initiatives. This is where the Ministry of Culture and Tourism should get involved by producing strategies and tactics not to lose potential visitors to other countries" [Istanbul Interview: 4].

When they were asked about the interaction between locals and visitors, the interviewees mostly mentioned what seems to be a patrimonial characteristic of the Turkish culture: *'hospitality towards outsiders'*. The code *'community acceptance of tourism'* was attached to 9 quotations during the analysis of the primary data collected in Istanbul, all of which referred to this well-known characteristic of the citizens. One interviewee suggested that most of the visitors presume Istanbul to be a chaotic destination prior to their arrival and do not expect to be in contact with locals. However, according to the interviewee, the friendly approach becomes one of the strengths of the product package and is easily noticed especially by international visitors during their stay in the city. Concerns about the attitudes of residents towards the sector and visitors, meantime, were raised in relation to the biased conception of the visitors from the Eastern European and Russian markets among the locals. As two interviewees emphasised, early visitors from these generating markets were seen either as smugglers purchasing cheap goods in Turkey in order to trade them back in their own country, or as women involved in prostitution. Consequently, no matter what their main purpose of travel was, these visitors have mostly been treated differently from visitors of other nationalities. Some examples of the quotations attached to the code *'community acceptance of tourism'* are as follows:

"People were, at first, against the hosting of the Olympic Games in Istanbul. But, that was not because they thought that there would be some negative impacts of the event on the city. Most of them were not even aware how the Games could help Istanbul upgrade its status as well as infrastructure services. They were worried, because they did not think that we are fully ready to host such a major event. But when they saw our success in making Istanbul one of the remaining five cities selected for the bidding of the 2004 Games, they started to feel that we can actually win the bidding and host the Games here" [Istanbul Interview: 7].

"By and large, Turkish people are friendly and hospitable towards tourists. Shopkeepers, meantime, are aware of the fact that more tourists would mean more business. Therefore, it is fair to say that there is no major threat with regard to opposition towards tourism and tourists among the local community" [Istanbul Interview: 8].

"The locals, although, in general, present good examples of the Turkish hospitality, are sometimes occupied with biased attitudes and beliefs against visitors. That becomes most evident for the visitors from the Eastern European countries, such as Romania and Bulgaria. The shopping habits of some tourists around Laleli, where leather and textile products are purchased in bulks, resulted in the visitors from these markets to be treated differently by the shop owners and the locals" [Istanbul Interview: 12].

Numerous quotations attached to the codes *'educating locals'*, *'educating staff'*, *'educating the stakeholders'* and *'educating visitors'* indicate the importance of tourism education for the city, where tourism is still considered to be a developing economic activity. With the potential to actualise the target of increasing visitor numbers by consistent and effective tourism development plans in the future, it is thought that there would be need for more tourism organisations, hence better qualified staff to be employed in the sector. While most of the interviewees agreed that there should be more training and education programmes for young people, only two interviewees mentioned that their organisations run such programmes either for their own members of staff or for the general public. The quotations listed under the code *'educating staff'* mainly revolved around the concepts of the employment of low-skilled people in practice and the lack of vision in most tourism organisations to consider *'education'* as an inevitable component of tourism development and marketing. This negligence was also suggested as the main reason why there are not enough seminars, conferences and workshops organised to aim *'public attendance'*. Again, among the 8 quotations linked to the code *'educating locals'*, only two were about programmes regularly run by the organisations. The rest, as shown below, consisted of suggestions to improve the current situation and problems experienced during the interaction between visitors and residents, who are supposedly unenlightened about the benefits of tourism.

"We can resemble tourism to an orchestra. Every musician in the orchestra should play harmoniously and in line with what the others' are playing. If we think that the Government is the conductor of the tourism orchestra, there are also other various subgroups, which should work in co-operation. If they start to play different songs at the same time, the harmony would turn into chaos...Local residents are part of this orchestra, too. They should be more

considerate and not chuck out their rubbish on to streets, for example. As well as they need to be educated about the benefits of tourism, they should learn to respect the environment they are living in, so that it can be preserved for future generations" [Istanbul Interview: 9].

'I, personally, think that a city-wide campaign striving for the participation of all tourism employees in education programmes, would be extremely beneficial for the industry. We all know that we are short in qualified tourism staff. When the development of tourism was given an impetus by government initiatives in the early 1980s, tourism organisations had no choice but to employ farmers, who were available during tourist seasons. They were made waiters, receptionists and so on, and were asked to go back to their farming when tourist season ended, until the next year. The situation is not that bad now. But we still need more university graduates, who are equipped with proper managerial and social skills, to work in the industry" [Istanbul Interview: 12].

As with London and Amsterdam, the expressions of the Istanbul interviewees on the education of stakeholders mainly referred to the need to educate tourism organisations about the benefits of partnerships and alliances. The interview findings suggest that the tourism organisations are not fully aware of how establishing a one-voice approach in marketing and development activities would help their organisations and the overall product package of the city. In addition to the lack of interest shown in existing partnerships by the stakeholders, the public authorities are also criticised for not taking the lead to encourage collaboration in the sector. The following were all noted to be the major dilemmas: bureaucratic obstacles during the early days of new partnerships' establishment; tourism not being given priority in budget allocations; limited initiatives provided to partnership organisations; and the misjudgement of some tourism organisations, which consider membership fees as wasted money especially during crisis periods. Meantime, as opposed to the 9 quotations in the code *'educating the stakeholders'*, the code *'educating visitors'* embraced relatively less statements *-i.e. 3 quotations-*. These quotations stressed the changing characteristics of tourism demand around the world, which enabled visitors from low social groups with limited budget to travel more frequently than they did in the past. As a result, it is believed that these visitors have only a vague idea about the city and its tourism offer prior to their arrival, and might leave the city full of misconceptions and false ideas, unless they are not informed about the facts and the existing tourism services and facilities appealing to their expectations and tastes. Two of the quotations from each of these codes are as follows:

"There are informative brochures about Istanbul and our museum at the entrance. In general, visitors are keen on finding out more about the city and the museum. But, we do not get that surprised, if they come and say 'we did not know such a museum existed in Istanbul' or 'we did not know that special item was on display in this museum'. With our finite personnel, whose suitability for the jobs is also debatable, we cannot say we provide the best service here. But, there are problems caused by incognizant visitors, too" [Istanbul Interview: 10].

"This is supposed to be a partnership organisation. But I am under a lot of pressure to keep it running, and I do that voluntarily. We have come up with this 'joining efforts' idea one and half years ago. However, we still do not have enough money to pay for the activities that we propose to do. There are not enough members, hence not enough membership fees collected... Yet, I continue to take part in trade meetings, seminars and conferences and to talk about the activities of our board. When appropriate, I even visit big companies for one-to-one meetings... No doubt that we will go through this evolution process for sometime. But I truly believe that the future of the Board will be bright, as the number of members continue to increase slowly" [Istanbul Interview: 2].

To conclude, quality of life in tourist destinations is an intricate concept, which can be measured by analysing manifold objective and subjective indicators. While some of the objective indicators, such as safety, crowding, congestion and decentralisation of tourism, are discussed in previous sections from the tourism point of view, the above analyses of the case study destinations relied on the opinions of the interviewees and offer some insight into the subjective indicators in each city. In summary, London, Amsterdam and Istanbul share some uniform urban problems, which influence the overall wellbeing of the cities negatively. Traffic congestion, crowding in central areas and a constant need for infrastructure improvement are some of these problems. On the other hand, there are other issues, which are specific to each city and require appropriate strategies developed by the authorities. *'Dog-faeces'* in the main streets of Amsterdam, for instance, was a problem threatening cleanliness in the past such that the Netherlands Board of Tourism felt the urge to deal with the matter in its annual tourism development plan (NBT, 1996). Some of the quality concerns in Istanbul, meantime, are related to the city's status as the biggest metropolitan area of a developing country. In fact, it is *'the developing tourist destination in a developing country'* characteristic of Istanbul, which made the interviewees stress the importance of *'education for all'* in order to achieve appropriate quality standards and to develop sustainable tourism.

As tourist destinations, none of the case study cities are found to reach their capacity limits in respect of the *'quality'* of the tourist product packages offered. The most threatening factor in London is arguably the centralisation of tourism activities. However, the urban regeneration projects in several outer districts of the city have been undertaken with the hope that they would both spread visitors across the city and help run down urban areas to improve their standard of living with investments in housing, businesses, entertainment and recreation (Smith and Smith, 2000). Congestion charges proposed by the Greater London Authority and practised in central London since mid-2001, is a good example of local authorities' approach to deal with traffic congestion in crowding in inner-city locations (GLA, 2002b).

The growth of sex tourism, meantime, can be argued to be the main reason for specific social problems like drugs, prostitution and high crime rates in Amsterdam. Although all of these factors could create much lower carrying capacity limits in the city, the recent efforts of the local authorities to attract families and elderly visitors are thought to balance the visitor profile of the city. In fact, various reports on the quality of life in general and the quality of services and attractions of the tourism sector prepared for each city indicate that the local authorities acknowledge the fact that quality of life can only be achieved through strategic plans and policies over a long period of time (Government Office for London, 2000; Corporation of London, 2000; IBB, 2002; and City of Amsterdam, 2000).

6.5. Conclusion

This chapter, to a certain extent, was aimed to present the similarities and differences between what the tourism research and statistics on each of the case study cities suggest with regard to their status as tourist destinations, and the perceptions and ideas of the key stakeholders on the same issues. With regard to the life cycle analyses, it was found that what tourism statistics and the characteristics of each case study imply concerning the status of Amsterdam, London and Istanbul, match the findings from the interviews. Given the fact that London is the most visited city destination in the world and the other two cities being popular in the European market, the assumption raised during the primary data collection that neither of them would be at the initial phase of involvement was confirmed by this research. However, the phases that each city occupied in their life cycle differed. As opposed to Istanbul, which has recently started to attract large numbers of international visitors, London and Amsterdam were found to be well-established tourist destinations, arguably, at the phase of consolidation. The analyses also showed that the tourism sector in each city has been affected by many external factors such as crises. Therefore, in addition to appropriate development plans and marketing strategies, their future growth highly depends on economic, politic and social changes taking place both globally and nationally.

In this research, the SWOT analysis is used to assess the aspects of the cities, which were considered as advantageous components of their tourist product package. The purpose of the analysis was not to investigate how the interviewees would comment on the strong aspects identified by the leading tourist authorities of Amsterdam, Istanbul and London. Still, there is a clear overlap between the factors mentioned as the strengths of the cities by the interviewees and the existing SWOT analyses carried out by the tourism organisations and academics. In the light of this information, *'heritage'*, *'gateway'*, *'arts, culture and entertainment'*, *'landmarks'*, *'shopping'*, *'friendliness'*, *'special events'*, *'accommodation'*, *'accessibility'* and *'cheapness'* were all mentioned by the interviewees and formed the uniform strength elements around the code *'uniqueness'* in each city. Similarly, the cities have both common and distinctive weaknesses, which have either a direct or indirect impact on their tourism sector. Some of these weak aspects are urban-based issues such as infrastructure and transportation problems, whereas tourism-oriented problems include crowding caused by large numbers of visitors in central tourist zones.

Some of the development, improvement and revitalisation schemes carried out and proposed by the selected cities, were all thought to have beneficial effects for the tourism sector, although the interviewees also raised concerns regarding the effective management, marketing and utilisation of certain projects. Criticisms were mainly raised with regard to the role of tourism as a catalyst in such projects, the likely economic and social effects of the projects on both the sector in particular and the urban network in general and, the lack of co-operation among tourism organisations. London has stood out from the other case study cities with a higher number of development projects proposed, designed and constructed in order to regenerate certain districts, to diversify the tourism offer and to upgrade the infrastructure services. While new tourism developments agreed by the local authorities in Amsterdam were found to be limited, Istanbul, as a developing destination, was considered to need more attention to both enriching the tourism offer and upgrading its infrastructure services.

The carrying capacity analyses conducted in this research, suggest that each case study has a unique urban form, which influence the concentration of tourist flows as well as tourist attractions and services. In Amsterdam, '*an open-air museum*', the spatial and functional distribution of tourism attractions and services draw the borders of the major tourist zone within the very heart of the city. Istanbul, with its multi-centred characteristic, embraces tourist attractions, services and facilities in spread out locations to an extent that some attractions suffer from the lack of supporting products and facilities in their close proximity. Still, Beyoglu and the Historic Peninsula can be regarded as the main heritage and tourism centres. Finally, the emerging tourist zones and the efforts of local authorities to divert especially repeat visitors to new attractions built outside the inner-city are used as strategies to overcome '*crowding*' and '*central tourist zone*' problems of London.

CHAPTER 7. MARKETING AMSTERDAM, LONDON AND ISTANBUL FOR TOURISM

7.1. Introduction

Having investigated the characteristics of the case study cities as tourist product packages in Chapter 6, this chapter focuses on: the leading tourist authorities as city marketers; their city-wide marketing and development plans, and; their efforts to promote the cities concerned. As in the previous chapter, the information presented in the following sections is gathered from both secondary sources and the primary data of this research in the hope that the actual practices can be compared with the opinions and beliefs of the interviewed personnel representing various stakeholder organisations. The chapter, first, investigates the tourism network in the case study cities, which is followed by several headings on marketing-related concepts, such as competitiveness, market segmentation and marketing tools.

7.2. Tourism Network: Organisation for Marketing in the Case Study Cities

As mentioned in Chapters 2 and 3, tourism stakeholders need to work in harmony in order to activate tourism's role as a catalyst in urban economies. Interdependence of tourism organisations operating in city destinations does not only make urban environments complex tourist product packages, but also requires destination-wide tourism development and marketing plans to be supported and practised accordingly by a variety of organisations. In addition to such plurality of sector operators and destination marketers in cities, the need to consider the sector as a component of the overall urban economic and social systems means that various other organisations, such as security forces, municipalities, and local authorities responsible for education, housing, trade, environment, culture and infrastructure maintenance play important roles in either product improvement and development or information dissemination within the destination network.

Clearly it would be impossible to examine the efforts of all concerned organisations to market the case study cities in detail owing to the limitations of this research. Therefore, attention in the following sections is given to those leading tourist authorities responsible for the city-wide planning and marketing with some examples demonstrating the differences between the cities in their approach to destination marketing. Different hierarchical levels of tourism organisation networks extending from national to regional tourism authorities, and from local tourism organisations to partnerships are also investigated where applicable, in order to understand the importance given to each city as a tourist destination and their tourism sector by the governments and the stakeholders. In other words, this chapter is designed to focus on the marketing activities prepared for the overall product packages of the concerned cities rather than individual tourist products or services.

7.2.1. London: Decentralised Tourism Marketing Through Partnerships

As Bull and Church (1996) argue, the history of urban tourism policy goes way back in London than anywhere else in the UK. With major historic events like the British Empire Exhibition and the Festival of Britain held in 1924 and 1951 respectively, the local authorities were forced to deal with large number of visitors and to approach tourism in a co-ordinated and systematic manner by the beginning of the 20th century in this one of the leading tourist destinations of the world today. While tourism policies and strategies had evolved mainly around ad-hoc events until the mid-1900s, it is arguably the mass tourism movement, which provided the key stimulus for the development of a long-term and consistent tourism policy in London by the early 1960s. In addition to the establishment of the London Tourist Board (LTB) in 1963, tourism was given gradually increasing importance in land-use planning policies of the central boroughs, where tourism had become one of the major income generator sectors. However, as the authors further add, the first city-wide tourism plan, produced in 1974 by the joined efforts of the Greater London Council, four central London boroughs, the LTB and the English Tourist Board (ETB), concentrated mainly on further co-ordination among sector stakeholders and encouragement of less restrictive tourism development, but lacked the provision of guidelines for improvement and for control of tourism growth in the city.

Another important legislative development with regard to the organisation for tourism within the UK was the Development of Tourism Act 1969, which led to the establishment of the British Tourist Authority (BTA) and the national tourist boards for England, Scotland and Wales with defined powers, structures and functions. While the foremost aim of the national tourist boards was determined so as to develop and market tourism within their respective territories, and encourage British people to take trips in Britain, the BTA was made responsible for promoting the country as a destination to international markets (Glyptis, 1991). After its establishment, the English Tourist Board gave high priority to the establishment of regional tourist organisations and stimulated the creation and growth of non-statutory regional tourist boards in England during the first half of the 1970s. While the LTB had been already established at the time, it became one of the twelve regional tourist organisations of the ETB (Pattinson, 1990). Moreover, as the gateway destination to the whole country, London has always been given high priority on the agendas of both the BTA and the ETB (now known as the English Tourism Council, ETC) since their establishment.

Alongside the statutory organisations responsible solely for national and regional tourism development and marketing, the sector has been represented by different authorities within consecutive governments. While the government department with direct responsibility for tourism was the Department of Employment (DoE) in the 1980s, the Department of Environment and the Department of Transport had key roles and worked in co-ordination in tourism-related matters at national and local levels with the DoE (LTBCB, 1987). The BTA and national tourist boards reported to the DoE and the respective regional Secretaries of State (Glyptis, 1991). In 1992, the Department of National Heritage (DNH) was established with tourism as part of its remit and was designated to create the National Lottery and to manage the funds raised by it. In addition to its unique standing as the governmental department solely accountable to tourism, arts, leisure and recreation for the first time in the UK's history (NEDC, 1992; Wood, 1996), the DNH had funnelled lottery-raised money into various tourism projects including the renovation and restoration of existing tourist attractions, building new ones and organising events such as the Millennium Dome built for the Millennium celebrations in Greenwich, until its restructuring as the Department for Culture, Media and Sport (DCMS) in 1997.

Following the Labour Party's victory in the 1997 General Elections, several proposals and reforms were introduced according to the national tourism policy of the new Government as later presented in the *'Tomorrow's Tourism'* report by DCMS (1999). The new tourism policy was evolved in partnership called the *'Tourism Forum'*, consisting of 57 member organisations representing different sub-industries of the tourism sector and various tourist regions across the country. While the Forum is chaired by the Secretary of State for Culture, Media and Sport, the member organisations, ranging from national airlines to heritage attractions, and from regional tourist boards to trade associations, discussed the major issues associated with the UK tourism sector and helped the DCMS to constitute its tourism plan. The outcomes of the Forum and its working groups were grouped under 15 headings and formed the basis of the DCMS' tourism strategy and its action points. These action points at the core of the new national tourism plan were (DCMS, 1999):

1) to create a blueprint for the sustainable development of tourism to safeguard environment, heritage and culture for future generations;
2) to introduce initiatives to widen access to tourism;
3) to fund a more focused and aggressive overseas promotion programme;
4) to build new internet systems to deliver world-wide tourist bookings for Britain and to provide information on attractions and travel options;
5) to introduce new computerised booking and information systems;
6) to organise a major careers festival and image campaign to raise the profile, and promote the image, of careers in the hospitality sector;
7) to help raise the quality of training in the sector and to encourage employers to work towards *'Investors in People'* standard;
8) to establish a new strategic tourism organisation for England to provide leadership to the English tourism sector;
9) to design a new grading scheme for all hotels and guest houses;

10) to identify new targets for hotel development in London and to allocate a further £4.5 million for marketing to exploit its potential as a premier location for business travellers and holidaymakers and as a gateway to Britain;
11) to support more integrated promotion of the cultural, heritage and countryside attractions throughout Britain;
12) to benefit from innovative niche markets, such as film tourism and sports tourism, in order to stimulate growth in both visitor arrivals and tourism income;
13) to encourage the regeneration of traditional resorts;
14) to ascertain more government support for the regions to give each part of the country better resources to develop their own identity and strengths, and finally;
15) to organise an annual Tourism Summit bringing the sector and the Government together to monitor progress, plan future actions and encourage working in partnerships.

As the above listed action points suggest, there are some key areas, which the new tourism plan emphasised. To start with, the new tourism plan stressed the need for preparing consistent and coherent long-term and strategic tourism plans and their effective use in practice to serve both the shared objectives of the sector stakeholders and the sustainable growth of tourism in the country. The plan also proposed to restructure the regional tourism organisations, particularly the English Tourist Board, in order to strengthen their leadership roles and to expand the scope of their marketing activities. To do that, a bigger budget allocation for promotional campaigns was assured and the wider use of Internet in joined marketing activities was recommended. While raising the overall quality of tourist products and services was another key area, the only point which specifically concentrated on London as a tourist destination referred to further hotel development in the capital and to stress its gateway position for different market segments. Finally, monitoring progress and redefining action points according to the emerging strengths and weaknesses of the tourism sector in the country were proposed (DCMS, 1999).

The plans directly related to the London tourism sector and its management, development and marketing included some changes in policy-making and their practice. First, the London Tourist Board (LTB), now known as Visit London, was decided to be represented on the Board of the BTA together with the representatives of the regional tourism organisations of England, Scotland and Wales, which underlines the importance of the capital and its tourism sector for the whole country. The need to develop a coherent tourism strategy for London in line with the national and regional tourism plans was also addressed in order to respond changing customer expectations and to secure sustainable tourism growth. The lack of a leading tourism authority in the city was hoped to be overcome through the Mayor of London introducing city-wide tourism strategies, supported by the London Development Agency (LDA) and Visit London. In order to promote the destination, the Government agreed to provide £1.5 million a year for a three-year period to Visit London providing that the company works with the BTA on the overseas promotion. Finally, Visit London is assigned to encourage further hotel development and to reach a target of 10,000 new rooms to be built between 2001 and 2006 (DCMS, 1999).

While the action points outlined in *'Tomorrow's Tourism'* form the basis of a long-term tourism policy of the Government, the recent annual report of DCMS (2003) reveals what has been achieved by the department within a six-year period. The proposed reform to restructure the national tourism authority in England was brought to life with the introduction of the English Tourism Council (ETC) in 2002 with an increased role in the development and management of the English tourism sector. Effective from 2003, the BTA and the regional tourism boards are encouraged to work in co-operation to market the country as a whole and its tourist destinations to overseas and domestic markets. As will be discussed further, the scheme titled *'VisitBritain'* was launched in response to such initiatives, where the marketing strengths and resources of the BTA and the ETC are combined (LDA, 2003).

More specifically about London and its tourism sector, the DCMS has agreed to prepare a bidding campaign to host the 2012 Olympic Games in the city. It has also spent £5.5 million for a project aiming to improve and upgrade the Royal Parks in London and has supported the modernisation programme of the British Museum (DCMS, 2003). To summarise, the recent annual report of DCMS continues to highlight the initially developed 15 action points and gives high priority to sustainable tourism growth, effective marketing, product development and improvement, better organisation and partnership establishment in tourism management, and raising the quality of services and products offered by the sector. These points offer insight into: what importance given to the tourism sector by the British government; how the government approaches tourism development and planning; and which strategies are considered in order to strengthen the sector's well-being.

7.2.1.1. British Tourist Authority / VisitBritain

At the highest level of the hierarchy, the British Tourist Authority (BTA) represents the tourism sector on a national scale. Following its establishment according to the Development of Tourism Act 1969, the BTA overtook the responsibilities of the British Travel Association, which had until then been Britain's national tourist organisation. The major importance of the BTA has stemmed from its status as the only authority promoting tourism to Britain from overseas markets and, also from its prominent advisory role to Governments on the development and elaboration of the nationwide tourism policies and strategies. In fact, overseas marketing and advisory role have been accompanying the authority's responsibility to encourage the provision and improvement of tourist amenities and facilities in Britain, as the intact and unchanging organisation objectives since the launch of the BTA (Jefferson, 1990; BTA, 2002).

The BTA is funded primarily by grant-in-aid from the DCMS, but it also receives income from joint activities with the private and public sector organisations. In its organisational structure, the BTA embraces eight main departments, -*i.e. overseas operations, corporate services, communications, England marketing, international marketing, customer services, strategy and insight and human resources*-, each having a non-executive director appointed by the Secretary of State for Culture, Media and Sport. Executive responsibility is delegated to the Chief Executive, who receives departmental reports and presents to the Chairman (*see Appendix 21 for the BTA organisation structure*). While the BTA is operationally organised into two regions, namely Europe and long haul markets, it is represented in 27 different countries ranging from Argentina to South Africa, through the BTA offices (BTA, 2002). In addition to these existing overseas branches, the authority is currently launching new offices in Poland, Russia, China and South Korea, which are considered as emerging and growing visitor generating markets (BTA, 2003).

As mentioned above, in April 2003, a new partnership called *'VisitBritain'* was brought to life through the merger of the BTA and the English Tourism Council (BTA, 2003). Although each of these organisations continue to retain their own operational structures, they are brought together mainly to represent the tourism sector to all concerned parties including potential and existing overseas visitors, stakeholders, the Government, international affiliates, trade associations and the domestic market. The establishment of VisitBritain attempts to fulfil several objectives listed in the *'Tomorrow's Tourism'* report (DCMS, 2003). First, the main goal of VisitBritain is to contribute tourism by using innovative and effective marketing and to work closely with partner organisations to increase visitor arrivals and spending to the country (BTA, 2003). In other words, it can be argued that the main motive behind this merger is marketing-oriented. The aims to engage in more focused overseas promotion, to expand the use of the internet as a marketing medium and, to facilitate integrated promotion among tourism authorities as stated in the national tourism strategy plan, are put into practice through VisitBritain.

Secondly, this so-called modernisation programme is attributed to the reformation of statutory tourist authorities in such a way as to enhance their leadership role in the tourism sector. Along with the reconstruction of the English Tourist Board as the new ETC, this new merger is formed in order to further encourage sustainable tourism and to respond to crisis situations effectively and appropriately through the joined efforts of the two organisations. The strengthened leadership positions of the BTA and the ETC are also considered to lead to more effective and less costly promotion campaigns both in the domestic and overseas markets. Finally, the creation of VisitBritain is expected to assist in the process of preparing and activating coherent and consistent national tourism plans and to secure the support of the Government (DCMS, 2003).

When the operational goals of VisitBritain are examined, the main focus on marketing becomes clear. These goals are (BTA, 2003):

- To promote Britain overseas as a tourist destination, and to spread tourism income throughout Britain and the year;
- To encourage domestic tourism market to take additional and/or longer breaks in England;
- To help the sector stakeholders in addressing the needs, wants and expectations of international and domestic markets more effectively;
- To provide advice to the Government and other responsible authorities on matters affecting tourism;
- To support further partnerships with the devolved administrations and the national and regional tourist boards in order to strengthen the position of Britain as a tourist destination in the international tourism market, and;
- To use resources more efficiently and effectively and to become an open, accessible, professional, accountable and responsive organisation.

A detailed analysis of these goals and the strategies determined within the first year of VisitBritain's establishment highlight several key issues. Among these, improving the brand position of both Britain and England seems to be given utmost importance by the organisation. VisitBritain aims to develop a unique brand for the whole country to reinforce the perceptions and expectations of visitors on the strengths of the tourism sector. While the branding of Britain as a whole and the regional and local tourist destinations as parts are linked with key themes such as heritage, the Internet is selected as the main medium to promote these interrelated brands. In addition to the websites of VisitBritain and VisitEngland designed to serve the needs and queries of all interested parties, the other marketing activities of the organisation ranging from promotional campaigns to public relations, support these newly created destination brands and aim to increase the understanding and awareness of tourism in the country (BTA, 2003). The brands for generic, coherent and relevant presentation of the British tourism are intended to be renewed regularly by a group comprised of the marketing directors of the national tourist boards (BTA, 2002).

Another issue, whose importance has been repeated persistently in the new strategic tourism plans of VisitBritain is the encouragement of partnerships among key organisations. Identifying, developing and nurturing long-term strategic co-operation with authorities and organisations in both tourism and non-tourism sectors and for both the British and English tourism sectors, is listed among the key targets of VisitBritain (BTA, 2003).

Finally, the fact that the understanding and meeting of the needs, wants and expectations of potential visitors can only be achieved through the utilisation of systematic and regular market research, is acknowledged by VisitBritain. Involvement in market intelligence and research retains its place among the priorities and key targets of the new organisation, as in the previous tourism plans of the BTA (BTA, 2002 and 2003). In fact, while VisitBritain aims to be a both market- and customer-centric organisation, the existing consumer database for the British tourism sector is to be expanded from 1.65 million records to a 6.3 million records over the next 3 years. With new visitor contact centres in key hubs around the world dealing with all inquiries of potential visitors, VisitBritain also plans to improve its Customer Relationship Management strategy. Monitoring new trends both in the sector and across the world, preparing a research plan to address knowledge gaps, providing market insight to the sector stakeholders, developing and improving new technologies to collect information on visitors on the Internet, publishing regular tourism and visitor statistics and launching a domestic evaluation programme are identified as the other key research-related targets of VisitBritain (BTA, 2003).

To sum up, the reformation process initiated to bring the BTA and the ETC together under the same umbrella, mainly serves to establish a strong leadership in the tourism sector and to benefit from the combined efforts of the organisations in marketing Britain to the inbound visitor markets and England to the domestic market (BTA, 2003). However, the effects of new technological developments and, the necessity to adapt these changes onto an IT strategy show why the creation of VisitBritain seemed inevitable. While VisitBritain will try to find a place for the country and its tourist destination products in the Internet world with the newly designed websites, the importance of destination marketing more than ever before due to increasing competition has also forced the organisation to introduce new tourism strategies. The traditional tasks of the BTA including: providing advisory help to the Government; undertaking market research on tourism and; encouraging development and improvement of the tourism sector, will also be carried out by VisitBritain. The only concern for the London tourism sector seems to be the aim to spread visitor arrivals and expenditure as evenly as possible across Britain. However, there is no doubt that this target would be achieved without causing any damage to the city, which is undeniably important for the whole country with its gateway position.

7.2.1.2. English Tourism Council / VisitEngland

The English Tourism Council (ETC) is the national statutory body for tourism in England, where the main gateway destination is London. The council was launched in 1999, as a transformation of the English Tourist Board (ETB), which was restructured and renamed in line with the proposals of the DCMS to optimise the funding and leadership positions of the national and regional tourism authorities (ETC, 1999). As mentioned above, the ETC has been a part of VisitBritain along with the BTA since 2002, where the organisations aim to benefit from their joined efforts and strengths in tourism development, management and marketing. Although some of the objectives and strategies of VisitBritain briefly outlined above are clearly attributable to the ETC, the focus here is on the aims, objectives and activities of the ETC as a partner organisation of VisitBritain, responsible for domestic tourism to England.

As with the BTA, the ETC is also funded by the DCMS. In fact, one of the rationales behind the replacement of the ETB with a new organisation was to optimise funding of tourism management and marketing activities in the country. Although the amount that DCMS allocates for domestic tourism in England has not increased much since the introduction of the ETC, the way the money shared between the ETC and the regional tourist boards has changed. With the view that support for tourism is better delivered closer to the visitor and sector at a regional level, the ETC has started to funnel larger portions of its government funding into the regional tourist boards, who now have a greater responsibility in identifying the issues and needs of the tourism sector in their areas. The proposals to deal with tourism-related issues on a regional scale are examined by the ETC, which then provides the concerned boards with grant funds providing that the projects meet with the objectives of the Government's overall tourism strategies. Since the regional tourist boards receive greater sums of funding from the ETC, they now execute some of the responsibilities previously carried out by the ETB, such as the management of training schemes and the support for Tourist Information Centres (ETC, 1999).

The transformation of the ETB was also justified by the fact that there was a need to strengthen the leadership position of the organisation in the tourism sector. In order to provide strong leadership, the ETC is encouraged to concentrate more on bringing the sector stakeholders together in partnerships and to provide the sector with accurate and appropriate information on: service and product quality; promotion of best practice and innovation and; sustainable tourism. To achieve this, the research responsibilities of the ETB are retained, but the new organisation is urged to monitor new data collection systems regularly and to benefit more from internet technology where applicable (DCMS, 1999).

Along with the revised tasks, the ETC is structured differently than the previous ETB (*see Appendix 22*). The new organisation is made up of seven departments, namely finance; communications; human resources and training; quality standards; policy and strategy; tourism technology and; research departments, each working across a range of issues and supplemented by the key personnel from the sector and national agencies. As in the BTA, heads of departments report to the Chief Executive, who then present the overall organisation report to the Chairman. As the organisational structure and the tasks dispersed among departments suggest, the ETC has been structured to become a business to business organisation as opposed to the consumer-based strategic and advisory role of its predecessor: the ETB. Although the

ETC maintains some of the high-street offices, they are now used mostly to assist sector stakeholders in issues related to quality standards and sustainable tourism development. As mentioned above, the management of operational activities, such as the operation of tourist information centres, is passed over to regional tourism boards with more funding provided for their use (ETC, 1999).

As a partner organisation of VisitBritain, the ETC represents the domestic tourism aspect of the sector. However, the organisation is no longer directly responsible for marketing England to domestic markets, which is considered to be better achieved by individual tourism organisations and regional tourist boards. Instead, the English Tourism Council is appointed to guide and assist organisations in how to market the tourism sector more effectively through researching advances in marketing techniques and developing a new brand for England. Although the Council does not operate destination promotion services, it continues to bring the interested parties and intermediary organisations together with relevant organisations, authorities and regional tourist boards as previously done by the ETB. The ETC also continues to disseminate information to the media on new developments in the tourism sector, product launches and new trends in market segments (ETC, 1999).

In the light of the above information, the main roles of the ETC as the national body for tourism in England, can be grouped under three main areas (ETC, 2001):

- to improve the quality of England's tourism sector;
- to strengthen the competitiveness of England as a tourist destination and;
- to encourage sustainable growth of tourism in England.

These roles are not achieved through direct marketing activities, but through providing intelligence, setting standards, creating partnerships and helping ensure consistency across the tourism sector (ETC, 2002). Meantime, the marketing tasks of the organisation mainly stems from its collaboration with the BTA under VisitBritain and revolves around introducing marketing strategies for domestic markets and developing a marketing brand for England and its tourism sector. It is thought that the consistent use of the newly created England brand will help establish a one-voice approach in all communication modes strengthening England's competitiveness as a tourist destination in all markets (ETC, 2001). As the partner organisations of VisitBritain, the BTA and the ETC have identified the following marketing-related priorities for England's tourism sector (BTA, 2003):

- Identifying, developing and nurturing long-term strategic partnerships with key national partners in both tourism and non-tourism sectors;
- Establishing a robust foundation of market insight for England;

- Developing a new brand for England that builds on consumers' perceptions of England and works effectively at local, regional, national and international levels;
- Defining the most compelling product sectors, niches, promotions and themes that will make England stand out from the competition;
- Developing the VisitEngland website to make it easier for visitors to source England information and make bookings and;
- Creating campaigns to increase understanding, awareness and appreciation of English tourism.

With regard to London, the ETC has identified several issues facing the tourism sector in the city. To start with, despite the recent efforts of the Greater London Authority (GLA), and the London Development Agency (LDA), there is still considered to be a lack of strategic leadership in London. Providing that the efforts continue consistently and coherently, there is a great opportunity for the economy of London to benefit from tourism. Unless all concerned organisations are brought together to work towards shared objectives under the guidance of an authority fulfilling the strategic leadership role, the fragmented nature of the sector and differing views are thought to continue to undermine positive initiatives (ETC, 2002).

Secondly, it is noted that there is a need for more strategic alliances bringing public and private sectors together. As most of the players in the tourism sector are private organisations, their support in the process of both strategy development and the application of the developed strategies is crucial. Besides strategic support from both public and private sectors is noted to make the delivery of many services including staff training, new product development, quality improvement and market intelligence more efficient and productive (ETC, 2002).

Finally, the need to reform the existing tourism authorities was raised by the ETC. In order to improve tourism delivery at a regional level, the transformation of the regional tourist boards into the regional development agencies throughout the country is currently being considered and investigated (ETC, 2002). The introduction of the London Tourist Board as Visit London Ltd working in close co-operation with the London Development Agency is a good example. The new organisation aims to attract more funding from public and private sector organisations, which as a result, is hoped to enhance its provision of services significantly. As will be discussed in the following section, the LDA and Visit London now co-operate on most issues regarding tourism in the city and collaborate throughout the process of developing a tourism plan for London and its utilisation.

7.2.1.3. Greater London Authority and London Development Agency

The first local government administrative body directly elected by the residents of Greater London was the Greater London Council (GLC) existed from 1965 to 1986. As the planning authority of the city, the GLC was responsible for public transport, road schemes, housing developments and regeneration. Although tourism was not among the priority tasks of the Council, its relationship with the sector stemmed from its control over inner-city transportation, the maintenance of historic buildings and monuments, cultural and arts activities, parks and open spaces, and licensing places of entertainment and exhibition halls (GLC, 1978). The GLC did not have an exclusive development or marketing strategy for the tourism sector in London, but it supported the sector and published several reports in the form of providing guidelines on how tourism could be flourished and what advantages London had for visitors at the time (GLC, 1973 and 1978).

Fourteen years after the abolition of the GLC, the present Labour government took the citizens of London to a referendum in May 1998 in order to vote for their support or opposition for the proposals to restore the council as the Greater London Authority (GLA), which would be chaired by a new Mayor of London. Nearly 75% of the residents voted in favour of setting up a new strategic authority for the city (ALG, 1998). As a result of the referendum, the local elections were held in 2000, when Ken Livingstone, the last chairman of the Greater London Council, was elected as the Mayor of London, along with 25 members consisting of the GLA's London Assembly.

Soon after the elections, the London Development Agency (LDA) was established within the GLA in July 2000 as London's economic development body, promoting inclusive and sustainable economic development and regeneration for the capital. As one of the nine Regional Development Agencies (RDAs) in England, the LDA works for the Mayor of London and in partnerships with public and private organisations. The LDA is mainly funded by the GLA, but also receives grants and loans from several Government programmes including the Single Regeneration Budget and London's Skills Development Fund. The Agency has developed the Mayor's Economic Development Strategy for London and is responsible for the delivery of statutory strategies outlined in this plan. The Mayor has delegated responsibility for the development and promotion of tourism to the LDA, which has prepared the Tourism Action Plan for London in co-operation with the then LTB, and is now directly accountable to the delivery of product development, infrastructure and tourism research activities (LDA, 2003).

As the new action plan prepared by the LDA entitled *'Visit London: the Mayor's Plan for Tourism in London 2003/4-2005/6'* suggests, the Mayor and the GLA are determined to play a proactive role in the development and marketing of tourism in London (GLA, 2002c) (*see*

Appendix 24 for the Planning Process of the Mayor's Plan for Tourism). In fact, tourism and hospitality have been selected along with the creative and cultural industries, and product and design, as the key income generators for the capital's economy, only for which the LDA develops sector strategies aiming to lead investment and to provide support for development (LDA, 2003).

The three-year strategic tourism plan of the Mayor, who provided £3 million for promoting tourism in London during the first year of the plan's execution, concentrates on four core priorities (GLA, 2002c and LDA, 2003):

1) Leadership and Promotion:
- To lead co-ordinated marketing and promotion of London as a world-class destination;
- To build partnerships and to encourage private sector involvement to maximise investment;
- To establish sub-regional tourism networks.

2) Market Development:
- To develop a five-year Marketing Framework for overseas and domestic markets;
- To promote the diversity and to support the development of emerging destinations across London.

3) Evidence and Intelligence:
- To develop a London-wide economic impact model for tourism;
- To develop a sustainable and co-ordinated research programme in order to monitor/forecast changes in the operating environment.

4) Product Development:
- To improve the value and quality of visitor accommodation;
- To enhance the quality of visitor information;
- To increase skills and the awareness of employment opportunities in the sector;
- To evaluate the feasibility of an International Conference Centre.

The plan formulated after extensive consultation with the London Tourist Board, the sector stakeholders and the London boroughs, primarily aims to make London attractive to both visitors and residents, while ensuring sustainable tourism growth across the city, where different parts share the sector's economic, social and environmental benefits as evenly as possible (GLA, 2002c). Further analysis of the above priorities and action points identified to meet each target, shows that the plan puts significant emphasis on the need for partnerships and the involvement of private sector organisations during the preparation of tourism development and marketing plans. It is hoped that private and public sector partnerships would facilitate the process of promoting the new brand of London through the use of key messages by all concerned organisations, while increased funding would move tourism up the political agenda and maximise investment in tourism (GLA, 2002c). To this end, while the Mayor becomes the strategic leader, the key players of the sector, who have differing perceptions and expectations regarding the growth of tourism in London, constitute the Tourism Advisory Group. The Group was consulted during the preparation phase of the Action Plan and will monitor its delivery (LDA, 2003).

Secondly, the plan stresses the diversity of London's tourism offer and the need to upgrade and improve the quality of tourist products and services in order to succeed in the fierce competition environment. There is no doubt that the municipal tasks implemented by the Mayor, such as public transportation and infrastructure services, influence the overall quality of London's tourism offer. However, more tourism-oriented action is called for: raising the standards of London's accommodation establishments; improving the appearance and attractiveness of streets and open spaces; and providing visitors with accurate and satisfactory information on different facilities and attractions (GLA, 2002c).

The strategy on product development also addresses the development of business tourism in London, which is considered to be lagging behind the achievements of its European competitors in this specific market. The event *-i.e. Business Tourism: the London Leadership Forum-* organised jointly by the LTB and LDA prior to the preparation of the Action Plan and bringing together the key leaders in London's business tourism sector, led to the identification of key issues, which need urgent consideration in order to benefit from the potential of business tourism to grow further in London. These issues are included in the Mayor's plan and cover: the assessment of proposals of a new international convention centre built in a central location; the provision of additional funding for the joint marketing of conference and convention facilities; the concentration on key business tourism generator markets, namely the US and European markets; and the need to boost civic pride among Londoners so that they become ambassadors for their city (LTBCB/LDA, 2003).

Finally, similar to the initiatives introduced by VisitBritain, the emphasis on marketing activities is evident in the Mayor's Plan for tourism in London. In line with the organisations merging on a national scale *–i.e. VisitBritain and VisitEngland-*, the plan proposed a new organisational structure for the London Tourist Board, which was later followed by its name change to Visit London Ltd. While the Mayor retains his strategic leader position and the LDA as the partner organisation responsible for the preparation and delivery of the Action Plan, Visit London is appointed to implement marketing and promotion activities of the plan (GLA, 2002c and VLL, 2003a). Focusing on London's gateway situation to the rest of the country, the marketing strategies are aligned with those of the BTA and are spread into a five-year strategic framework for delivery.

The creation of a new London brand integrated into the national tourism brand designed by the BTA; the development of strategies to spread tourism throughout the year and across the city; the wider use of e-tourism and the promotion of Visit London's web page to both overseas and domestic visitors; the evaluation of the potential of market segments such as business tourism and VFR markets and; the identification of new initiatives to encourage joint promotion through partnerships are some of the main action points of the new plan, which will be discussed further in the following sections. However, it is worth mentioning here that the marketing strategies of the plan are supported by a number of actions to be taken to improve tourism marketing research and the methods of data collection and assessment. This way it is hoped that tourism trends can be monitored and applied to the tourist offer of the city promptly and effectively (LDA, 2003).

To conclude, *'Visit London: The Mayor's Plan for Tourism in London'* has been produced as a three-year plan of long-term sustainable tourism growth in London providing that consequent Mayors expand on the plan's current strategies consistently and adapt them onto changing conditions in the future (GLA, 2002c). While the longstanding problem of the tourism sector in London, the lack of a strategic marketing and planning body, is now being challenged by the Mayor, the integration of the tourism plan with other city-wide statutory strategies, in particular the Draft London Plan, Economic Development Strategy, Draft Culture Strategy and Transport Strategy, ensures the implementation of an agreed agenda for urban development, and is more likely to be accepted by the key players of all economic sectors. As noted by the GLA (2002c), this is arguably the first ever co-ordinated tourism plan prepared for London, and its full benefits are yet to be seen.

7.2.1.4. London Tourist Board and Convention Bureau / Visit London

In June 2003, the name of the London Tourist Board (LTB) was changed to Visit London Limited, which was followed by modification of the London Convention Bureau's name as Visit London Business and Conventions in July 2003 (VLL, 2003a). In fact, it was not only alterations made to the company's name and logo, but also onto its organisational structure, objectives and strategies. As mentioned above, Visit London has been appointed to deliver marketing and promotion activities identified within the Mayor's Plan for Tourism in London and has become the Mayor's tourism agency (LDA, 2003). The company is funded by the LDA, member organisations, corporate sponsorship and a number of public bodies including the direct financial support provided by the Association of London Government (ALG) and indirect support by the London Boroughs through individual tourism initiatives and projects (VLL, 2003a).

With the new name and organisational structure, the mission statement of Visit London is:

> *"to lead the promotion of London as the world's most exciting city through targeting domestic and overseas leisure and business visitors as well as Londoners"* (VLL, 2003a, p.2).

While the mission statement underlines the expectations from Visit London to accomplish more marketing-focused operation as opposed to the wider set of tasks targeted by the former LTB, the objectives of Visit London are (VLL, 2003a):

- To influence people to visit London above other destinations and activities;
- To implement promotional activities to increase the sector's economic benefit to the city;
- To develop and enhance the London product in partnership with the sector;
- To ensure London remains competitive versus other world class cities;
- To galvanise and act as a voice for London's tourism sector and;
- To support the development of an economically sustainable and diverse tourism offering in partnership with the public and private sectors.

With its new organisational structure, the number of directors has reduced to two within Visit London, namely Commercial and Finance Directors, from four directors in the LTB: Directors of Marketing; Communications; Development and; Finance and Service. Under the management of the Commercial Director, there are five departments: marketing; corporate affairs; client services; sales and; media. The Finance Director, meantime, is responsible for the departments of finance and human resources. At the top of the organisational structure, there is the Chief Executive, who reports to Chairman through the Board of Directors, which consists of sixteen executives each representing a different sub-industry of the tourism sector including: conference and event organisers; hotel establishments; theatres; attractions; tour operators; the London boroughs and; local government and administrative authorities such as VisitBritain and GLA (*see Appendix 23 for the organisational structure of Visit London*).

As the agency responsible for marketing and promotion activities, Visit London now complies with the strategies identified by the Mayor and the LDA. In order to understand how the tourism policy-making and marketing strategies on London have evolved since the establishment of the LTB in 1963, the business plans and objectives of the LTB are assessed in this section. In the 1960s, the LTB had the limited objectives and aims of collecting visitor information, providing reception services and bringing conferences to London. In 1974, the LTB prepared its first tourism plan in co-operation with the Greater London Council (GLC), four central London boroughs and the ETB. This plan covered the issues concerning tourism at the time, but failed to produce effective policies and strategies to shape the growth of tourism in the city, mainly because the participant organisations could not agree on what was needed for sustainable growth. The economic recessions followed by the deindustrialisation of London's economy made the GLC and the LTB stress the catalyst role that tourism could play to revitalise London's economy in the early 1980s and it was only after the GLC's abolition in 1986 that the LTB took the lead in developing city-wide tourism plans (Bull and Church, 1996).

In 1987, the LTB prepared its first tourism plan called *'The Tourism Strategy for London'*, which concentrated on the matters raised by the Joint London Tourism Forum (JLTF) established in 1986. The Forum consisted of the key personnel of the local government authorities, the BTA, the ETB and fifty organisations representing the entire cross-section of interests involved in tourism. In addition to seeking guidance and co-ordination on tourism-related matters in London, the Forum was also formed to foster support among the sub-industries for the forth-coming strategy (Bull and Church, 1996). As an outcome, the Tourism Strategy identified the following objectives, which were retained as the organisation objectives of the LTB until its recent transformation as Visit London (LTBCB, 1987):

a) To promote general economic activity and growth in London;
b) To increase business and personal incomes and public sector revenues in the whole of London;
c) To maintain existing and generate new employment throughout London;
d) To contribute to urban renewal, raising of incomes and the provision of employment in those parts of London which would benefit most;
e) To minimise the effects of visitor pressures on those who live and work in London, and;
f) To contribute to environmental improvement and the range of amenities for London's residents.

As the above objectives stress, this initial strategy saw tourism as a sector with great potential to generate economic activity and employment opportunities. The growth of tourism was expected to happen spontaneously, and the efforts were directed towards spreading economic benefits of tourism across the city. The sectional strategies prepared within the plan were on: improving employment and training schemes for tourism personnel; educating residents on the benefits of tourism and; upgrading the products and services on the supply side, such as accommodation establishments, conference and exhibition facilities, attractions, transportation, catering services, shopping and tourist information centres (LTBCB, 1987).

The plan also included strategies for marketing, which briefly covered the fields of market segments, image, wider spatial and seasonal diffusion of tourism, tourist information centres, tourism for all and, market research and intelligence. The market segments signalling growth patterns were determined as business market, holiday market (short haul/long haul markets), VFR market and the market of study visits to learn English. The particular preference in promotional activities was given to independent and repeat visitors, who were considered to be keener on staying longer and spending more. In respect of market research, the need for improved forecasting methods assessing every possible aspect of the tourism sector and the use of qualitative research as well as quantitative techniques were stressed (LTBCB, 1987).

Despite its shortcomings in the implementation of the strategies identified mainly because of the limited financial resources of the LTB, which prevented the organisation from taking the expected lead in the tourism sector and to distribute varying strategy delivery responsibilities among different organisations, the Tourism Strategy for London became a long-term strategic plan, which the LTB used to prepare consistent and regular three-year action plans. The importance of the plan is also significant with regard to the efforts to establish co-operation among the sector stakeholders and to encourage them to participate in the policy-making process through the Joint London Tourism Forum. Finally, the aim of *'setting the scene'* was achieved fairly well with the thorough evaluation of what was present and what was needed on the supply side components of the tourism sector at the time. Since the competition was not seen as such a big threat to London's tourism sector and the fact that the BTA and the ETB were the responsible authorities for marketing tourism in overseas and domestic markets respectively, the marketing strategies and the demand side analysis in the Tourism Strategy for London were not as elaborate as the more recent plans prepared by the board.

The first two Action Plans, prepared as revised versions of the original plan with key actions recommended according to changing conditions of the operational environment, came in 1990 and 1993, each covering a three-year period. The Gulf War in 1990 and the economic recessions in the early 1990s led to a reconsideration of the priority tasks of the plan. Since the growth of tourism was interrupted and the sector experienced a dramatic downturn in business, the importance of marketing and promotion activities was underlined in the new Action Plan covering the period 1994-1997. Although the efforts of individual organisations to market their products and services were acknowledged, the need to market London as a whole destination package was noted to be imperative for the city's success particularly in the international market place. In addition to the encouragement of private and public sector partnerships to develop and promote tourism in London, the LTB nominated itself to lead the joint support of the tourism sector. While the aim to promote London as a destination for conferences, exhibitions, business meetings and incentive travel stayed constant as in the previous plans, the link between tourism and cultural/arts activities was suggested to indicate further development in the leisure/holiday markets. Along with the strategies for marketing, the Action Plan provided strategies for other aspects of tourism ranging from transportation to sustainable tourism growth, and from the effective use of the River Thames as a transport mean to the improvement of service quality in tourist attractions and accommodation establishments (LTB, 1993).

The LTB revised the main objectives of the Tourism Strategy for London in its next Action plan prepared in 1996 and covered the period 1997-2001. While the objectives on: the development of tourism as an economic activity generating new employment opportunities for local residents and; the need for sustainable growth spread across the city were retained, the new objectives identified were (LTB, 1996):

a) by emphasising London's *'Gateway'* position and the economic benefits that tourism would bring to the rest of the UK by ensuring that London secures at least its share of the expected world-wide growth in tourism and;
b) in a way which maintain and improves the quality of the product and as a contribution to London's *'World City'* status.

As these new objectives suggest, the need for more exclusive and co-operative marketing efforts were addressed by the LTB in the new Action Plan. The emphasis on the *'gateway'* and *'world city'* status of London can also be argued to be the first attempt to brand the overall product package by highlighting the city's advantages as a tourist destination. In fact, prior to the Action Plan, the LTB created a new *'marque'* for London and started using the marque on its official publications. The board also developed a campaign to encourage its use by sector stakeholders. The move towards a marketing-oriented approach was further sustained when the newly established DCMS announced that there would be more funding provided for promoting London abroad and that the new Labour Government decided to proceed with the Millennium Celebrations to be held in Greenwich (LTB, 1996).

With these changes taking place in the city, the LTB identified its new marketing strategies as: to continue leading the marketing efforts of London both for business and leisure visitors at city-wide and sub-regional levels; to secure the combined support of the key organisations operating in the sub-industries; to promote the projected Millennium activities; to monitor new trends in the market segments and; to assess the expectations and needs of existing and potential visitors. While most of the other strategy fields, including accommodation, transport, product quality and sustainable growth were retained, the new plan embraced a new set of actions for tourism management to upgrade visitor management techniques through better signage, information and to improve traffic flow and pedestrianisation within the major tourist zones (LTB, 1996).

To sum up, the Tourism Strategy for London launched in 1987, had been a long-term strategy of the London Tourist Board (LTB), which implemented the plan through three-year Action Plans until very recently, when the Mayor of London and the LDA acquired a proactive role in tourism development and planning in the Capital. In comparison to the wide range of previous tasks of the LTB, the organisation is now a marketing agency of the Mayor with a new name, Visit London Ltd, and a new organisational structure. In the short-term, Visit London aims to expand its members in order to establish a broader representation of stakeholders and other economic sectors (VLL, 2003a). The previous and current marketing activities of the organisation will be investigated further in the following sections along with different marketing tools used by each case study city.

7.2.1.5. Partnerships, Associations and Other Key Players as Marketers of London

As Bull and Church (1996) cite, there were eleven major public organisations leading the development and promotion of tourism in the late 1970s, which triggered controversy over the establishment of a single leading tourism authority in London. Since the success of tourism highly depends on, for example, the accessibility and safety of any destination, it becomes clear that tourism planning cannot be prepared, or at least implemented, effectively without the collaboration of such public authorities as the Transport for London and the Metropolitan Police Authority. While various other public organisations can be added to the list covering local education, health and fire authorities, it should be noted that tourism development and marketing requires the collaboration of these manifold players, but should reside with one leading authority in its capacity to harmonise different perspectives during the planning process.

In London, such criticism is presently countered, to a certain extent, by the Mayor of London introducing a city-wide tourism plan integrated with his other city-wide economic and development plans. Yet, there are still plenty of other organisations including trade associations set up by almost all sub-industries of tourism, whose co-operation throughout the implementation of the plan is crucial. In fact, as mentioned above, the representatives of most trade associations have been consulted during the preparation of both the Mayor's Plan for Tourism in London, and of the new tourism plan of VisitBritain (LDA, 2003 and BTA, 2003). Some of these associations are: the Association of British Travel Agents (ABTA); the Association of Leading Visitor Attractions (ALVA); the British Hospitality Association (BHA); the British Incoming Tour Operators Association (BITOA); the British Retail Consortium (BRC); the British Association of Conference Destinations (BACD); the Association of Professional Tour Guides (APTG) and; the Restaurant Association.

Although some of these associations do not directly engage in destination marketing activities themselves, their importance stems from the fact that their advice can lead their member organisations to collaborating with the implementation of city-wide strategies and the creation of a *'one-voice'* approach through consistent and coherent marketing activities. However, the ABTA and the BITOA play a much more significant role in London's marketing, as they represent those organisations operating at the distribution level, who themselves promote destination offers combining several tourist products and services to diverse target markets. It should be further noted that, most of these trade associations are based in London, not only because they acknowledge the importance of the city as a gateway destination to whole country, but also because most of their member organisations are London-based. Therefore, their support for the joint marketing activities and development plans can be expected to be persistent as long as they are convinced that new developments benefit London's tourism sector in general and their members in particular.

On a local level, the Association of London Government (ALG) plays an important role and supports the new tourism plan for London through providing direct funding to Visit London, and also through representing the London Boroughs. While the ALG grant aid ensures the boroughs' co-operation with city-wide plans, the ALG strives for better diffusion of tourism and its benefits across the city and improved employment opportunities for London's residents especially in those areas, where tourism is expected to revitalise the local economy (LTBCB, 2002). Meantime, some of the boroughs have been involved in tourism development and marketing plans themselves, in order either to deal with visitor concentration in already popular places like Kensington, Westminster and Camden, or to set a new framework to develop tourism with new attractions emerging in places like Docklands, Southwark and Greenwich.

For example, the tourism management strategy developed by the London Borough of Camden in 1997 is a composite plan covering a period of seven years and identifying the vision, goals and strategy of the Borough in the field of tourism. The plan, which embraces strategies on product development, quality improvement and visitor management, also includes new strategic interventions on marketing Camden as a tourist destination and providing potential and existing visitors with satisfactory information. The Borough adopts a new marketing brand identity for the borough under the theme of *'Camden: London's Cultural Quarter'*, identifies high-spending and young visitors as new target markets, conducts visitor research and publishes written material such as visitor maps and leaflets on available attractions within the Borough. Most importantly, the strategy stresses the need for co-operation with the LTB and the private sector in order to achieve greater impact in the long-term (The London Borough of Camden, 1997). Research by Tyler (1998) offers another example of local tourism plans, which investigates how the recent openings of visitor attractions along the banks of the River Thames has led to a systematic and structured planning process to be adopted by the London Borough of Southwark.

Another organisation recently involved in promoting London mainly as a sports city, is the newly established London 2012, which prepares the bidding campaign to host the 2012 Summer Olympic Games in the city. In addition to the coverage of new sports complexes and an Olympic Village proposed for East London, the promotional publications of London 2012 stress the competitive strengths of London as a tourist destination equipped with adequate tourism infra- and supra-structure to host such a major international event. Although the campaign directed by the organisation may initially seem to target the members of the International Olympic Committee (IOC) in order to influence their decision in favour of London, such bidding campaigns are especially important to generate support among residents and local businesses and to boost civic pride. Therefore, it is not surprising to find that the initial leaflets and brochures prepared by London 2012 often refers to the benefits of hosting the Games to tourism sector, to the environmental and urban developments of London, to residents and to all London-based businesses and organisations (London 2012, 2003).

Marketing London as a business location, meantime, has been attempted by London First and London First Centre since their establishment in 1992 and 1994 respectively. Bringing over 300 private sector organisations as the single source of funding, London First aims to promote London as a destination for inward investors and international business visitors and to enable, monitor and benchmark the sustainable economic development of the city (London First, 1997). While the previous campaigns of the organisation include promotions: for improved transport and air quality; for better accommodation facilities; for upgrading infrastructure in outer districts and; for the Millennium Celebrations, London First now co-operates with the LDA and Visit London to attract business visitors (London First, 1998a and 1998b, and LTBCB/LDA, 2003).

London First Centre, the inward investment agency for London established as a subsidiary of London First, aims to promote London as a location for businesses and assists businesses on all aspects of setting up an operation in London (London First Centre, 1998a and 1998b). Although established as private sector partnerships, both of the organisations are supported by public authorities such as the ALG, the Corporation of London and City of Westminster, who have become members represented by key personnel. This has reinforced London First's standing as the leading voice of the private business sector and as their representative lobbying on London-based issues to the Government.

In addition to these organisations, there are other partnerships, which either bring together the key players of the tourism sector operating in a particular geographic setting or those who are spread across the city, but target the same markets. In fact, the grants provided to revitalisation projects by the Single Regeneration Budget, has led to the establishment of numerous sub-regional partnerships in London since the late-1990s (LTB, 1996; Long, 1999). Among these, TourEast London, Central London Partnership, Cityside Regeneration Ltd, Discover Islington, King's Cross Partnership, Thames Gateway London Partnership, Greenwich Waterfront Development Partnership, Pool of London Partnership, Cross River Partnership, Central London Partnership and West London Partnership are just a few examples. While many embrace tourism within their overall urban development programmes consisting of new housing, employment and investment schemes, some, like TourEast London and Discover Islington, are mainly tourism-based projects and engage in intensive marketing activities promoting parts of London to both domestic and overseas visitor markets.

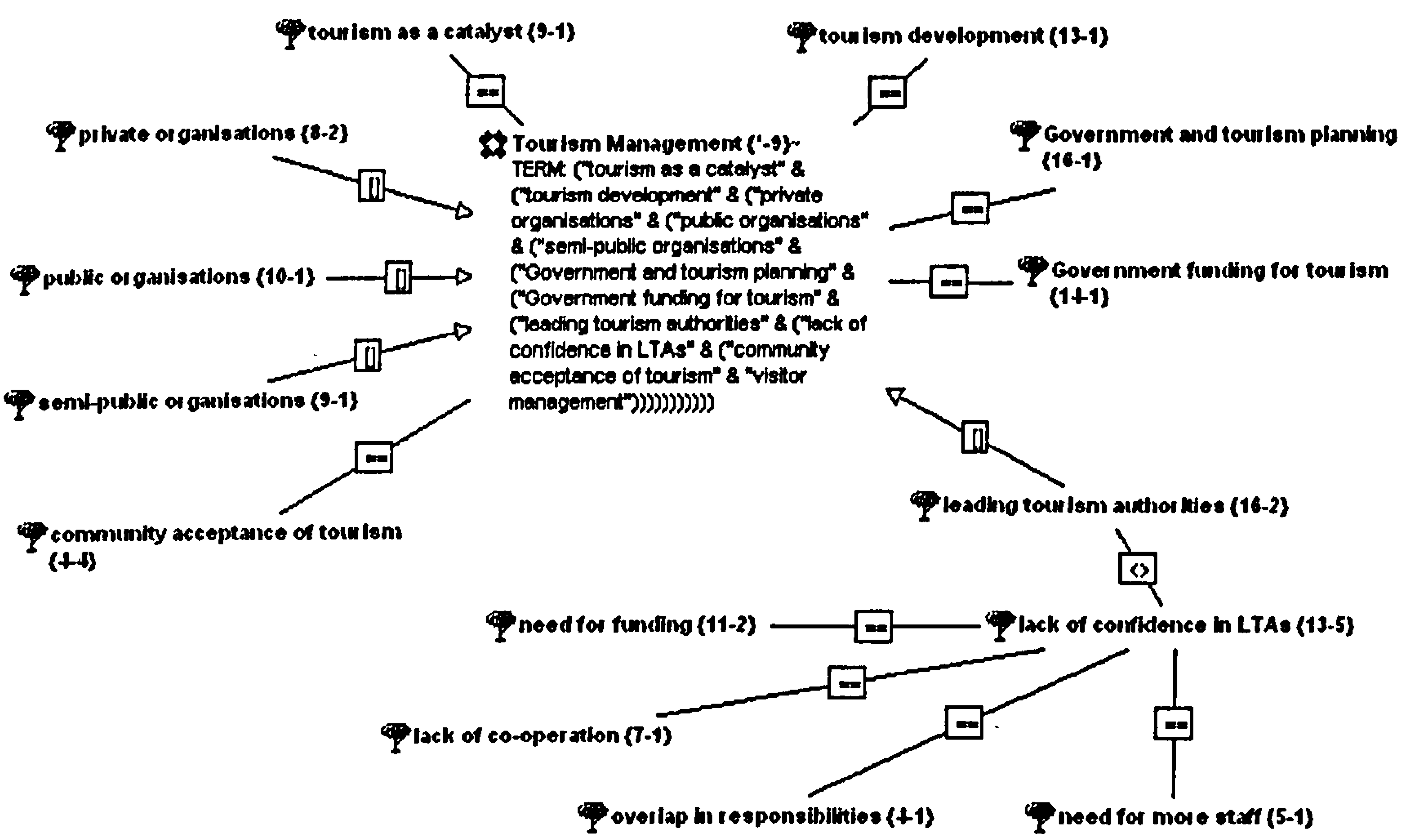
Among the marketers of London, one should consider individual tourism organisations ranging from individual tourist attractions to accommodation establishments, *-especially those, which stand as London-branches of international chains-*. Each of these organisations have their own tourism strategic plans and try to stabilise their position in London's overall tourism offering, while co-operating with other organisations to improve London's place in the international market. Similarly, the important role played by famous persona, such as the Queen and the Royal Family, as well as residents, in raising the image of London as a popular tourist destination cannot be overlooked. Recently, the influence that film releases, such as *'Shakespeare in Love'* and *'Notting Hill'* with Hollywood stars in their cast, have on millions of audiences world-wide has also encouraged organisations like Visit London and London First to persuade production companies to choose London as a stage for their upcoming projects (London First Centre, 1998a). While the impact of such marketing activities and tools used by a range of sector players will be investigated in the following sections where applicable, the next section offers insight into how the interviewees in this research assess the tourism organisation network in the city.

7.2.1.6 Interview Findings on The Tourism Management in London

The interview findings on tourism management are assembled under two networks, namely *'tourism management in London'* and *'partnerships in London'*. While the first network on tourism management embraces fifteen codes created to assort such remarks on development issues concerning the overall tourist product and the organisational structure of the tourism sector in London, the efforts to spread tourism across the city and the emergence of sub-regional partnerships has required a combination of quotations and codes to be listed under the second one. As Figure 7.1 illustrates, the network entitled *'tourism management in London'* include: the codes titled *'tourism development'*, *'tourism as a catalyst'*, *'leading tourism authorities'* (LTA) and, *'the lack of confidence in LTAs'*; the four codes on how to improve the effective functioning of the LTAs -i.e. *'need for more staff'*, *'lack of co-operation'*, *'overlap in responsibilities'* and *'need for funding'*-; those codes on public, private and semi-public organisations; two codes on the Government's approach to tourism development; and the one, which is considered to represent the local residents as a constituent of the tourism network, *'community acceptance of tourism'*.

The code *'tourism development'* was created during the analysis of the interview results in order to understand how the key personnel of major stakeholders in each case study associate their organisation with the overall tourism sector and how they assess the tourism development and management in their city. The quotations attached to the code consist of general commentary on the overall tourism management network in the cities, with no particular reference to any individual organisation. The code mostly helps to establish an overall framework of tourism management, and to evaluate what kind of motives drive these city destinations to develop the sector. It also helps to compare whether the tourism development objectives of the leading tourism organisations match with the expectations of sector stakeholders. For the analysis of the London interviews, for example, the code is attached to 13 quotations, with most of the interviewees referring to the benefits of systematic and consistent tourism development plans, tourism's importance for the overall well-being of London's economy and also for the sustainable growth of the sector.

Figure 7.1. Tourism Management Network in London



Seven interviewees from London emphasised the importance of tourism for urban development and the sector's multiplier effect on income generation. The wider diffusion of tourism movement across the city and the efforts of those outer regions to attract larger number of visitors to newly developed attractions follow the economic benefits with 5 quotations. The need to improve the quality of overall tourism offering in the city and to establish a common ground in tourism development plans developed by varied organisations were also mentioned by two interviewees. While most of the interviewees mentioned that their organisations prepare regular tourism plans, four stated that their main objective is to create a stronger position for their own products and services' through better integration with the whole London package. The significance of sustainable tourism was also raised by two interviewees. It is important to note that the reason why the number of different issues mentioned by the interviewees exceed the number of quotations attached to the code *'tourism development'*, is because most interviewees commented on more than one aspect of tourism development. Some examples are as follows:

> *"Without effective development, you can permanently damage what people are coming to see. There is no point coming and seeing something, if you are making it unseeable in the future. We need to be very aware of that aspect for the requirement of the sustainable tourism development... I would like to believe that everybody is alert to where it might become a problem. We are a little away off that yet. But the day could come" [London Interview: 4].*

> *"In one respect, it seems to me that tourism development is not only about marketing London, but about managing it as a destination. The organisations are marketing London for a reason, ostensibly. They are marketing to bring benefits, primarily economic benefits... Therefore, tourism marketing ideally should be tight into tourism management. In an ideal world, an organisation which markets a place, would have strong links with other organisations who are responsible for ensuring the quality of the experience maintained and the quality of life for residence population. Then, conflict is minimised. The resources are protected for future. Just packing as many people as possible seems to be short-sighted and a doomed approach really" [London Interview: 6].*

> *"We have tourism developments planned for this part -i.e. Southwark- of the city...We think that visitors coming into this part of London, will have a positive effect on the economics of the borough. Apart from the benefits the new attraction will get from the extra number of visitors, there will be new job opportunities for locals... Moreover, the new developments will have a broader regenerative effect on the area by attracting public investment, businesses and residents" [London Interview: 17].*

As the development of tourism is often associated with the sector's catalyst role in overall urban development, the need to create a code entitled *'tourism as a catalyst'* seemed inescapable during the analysis of the interview findings. Half of the London interviewees referred to the implementation of new tourism development schemes as part of regeneration programmes supported by public and private organisations. Six out of nine quotations were about the initiatives provided to the emerging tourist districts of London such as Southwark, Greenwich and East London. While one of the interviewees mentioned the positive effects of the sector on upgrading urban infrastructure and the maintenance of public spaces, two quotations attached to the code stressed the importance of various tourism development schemes undertaken across the city to the overall wellbeing of the London's physical, economic and social environments. The following quotations summarise such views:

> *"More visitors will bring in more investment, more hotels, more pubs and more leisure activities, which will, therefore, bring more visitors. So it will be an on-going effect. It is all about regeneration, and how tourism as a regeneration tool is very important in an area like (East London) where traditional industries have been lost forever... It is all about training local people... So the regeneration process you're bringing in is tourism with people working locally" [London Interview: 2].*

> *"In London, you cannot encourage visitors to visit already congested sites. We need to spread people across the city. We need to encourage them to visit places, where there is need for more income and economic regeneration" [London Interview: 15].*

The next two codes in the network of tourism management in London are created to interpret how the interviewees assess the Government's involvement in tourism development and management. Although the codes titled *'Government and tourism planning'* and *'Government funding for tourism'* mainly comprise differing views of the interviewees on the Government's tourism plans on a national scale, the research focus on London has led into the listing of those quotations regarding some of the governmental authorities at a local level as well. Not surprisingly, the high reoccurrence of both codes offer insight into how much the sector stakeholders appreciate the important role played by the Government in destination management and development on any geographical scale and, more importantly, into their expectation for consistent and coherent policies assuring a stable place for tourism in the Government's agenda.

In fact, half of the 16 quotations listed under the code *'Government and tourism planning'*, includes statements on the lobbying activities of major associations and partnership organisations in order to provide the concerned authorities with relevant and accurate information on the current trends and problems of the tourism sector from the perspective of stakeholders. While four interviewees stated that they were contented with the Government's effort to consult the key stakeholders during the policy-making process, three were concerned about the lack of consistency in tourism planning due to different approaches adopted by consecutive governments and emphasised the importance of persistence for long-term success. Another criticism, which was mentioned by one of the interviewees, was about bureaucracy obstructing sector stakeholders from reaching key personnel at different hierarchical levels. The quotations attached to the code *'Government and tourism development'* include the following:

> *"(We) are a member of (an association), which is a lobbying group on behalf of its member attractions, trying to encourage the government to develop policies which help us to be successful" [London Interview: 3].*
>
> *"Because of my job, I come into contact with a huge number of people. Not just retailers, but policemen, street cleaners, hotel managers and even fairground operators. I have to say that one of the largest, and sometimes most problematical group are Government officials" [London Interview: 7].*
>
> *"Surely, we need the support of the Government for tourism development and marketing. Fortunately, they have, so far, been supportive of our projects and have been encouraging us to take our projects further... But if we have a new government with a different view on tourism, then we might need to keep our projects on hold for awhile" [London Interview: 11].*

The quotations linked to the code *'Government funding for tourism'* support the above mentioned views on the requisition of destination-wide tourism policies to be prepared by public authorities, as most of the interviewees *-i.e. 14 quotations-* stressed the need for Government funding in tourism development. Although private sector co-operation in various regeneration projects was noted to be essential, five interviewees pointed at infrastructure development as a fundamental prerequisite of tourism development, which could only be accomplished with public financing. The grants and loans provided to regeneration projects and new attraction developments through the Single Regeneration Budget and the National Lottery were the most mentioned public sources with seven quotations. The only criticism raised was with regard to the privatisation of transport services. One of the interviewees was concerned that without government subsidies, public transportation would fail to achieve quality service provision at affordable prices:

> *"You could well say that if you have a public transport in any city in the world, it all tends to be government subsidised. The problem in this country is that it is not. They are trying to privatise everything. They privatised buses. They privatised trains... The main reason behind privatisation is because the investment in infrastructure is massive... It has also seen as benefiting the nation as a whole paying the tax, and yet the money they are paying is only benefiting a small number of people in the capital city... It is a very selfish attitude and it has caused a few problems in the past" [London Interview: 5].*

"What (regeneration projects) almost always need to survive is a great bulk of public sector money: whether it comes from a local authority, whether it comes from the European Commission Funding Programme, or whether it comes from the government funding programme such as the Single Regeneration Budget. Unless you have got the security of the long-term public sector funding to these bodies, I do not think they can work" [London Interview: 6].

"Some of the poorest boroughs in the country are in London. They need some assistance and contribution from the Government" [London Interview: 14].

The codes *'public organisations'*, *'private organisations'* and *'semi-public organisations'* are used to understand how different type of organisations contribute to the process of tourism development in London, and what sort of responsibilities are expected from each group with regard to destination marketing. Again, these codes do not attempt to measure the effectiveness of any particular organisation, but to explain: how the city-wide tourism management is perceived by the interviewees; how they evaluate the existing tourism network structure; and what they suggest for improvement. Among the ten quotations attached to the code *'public organisations'*, the statements mainly emphasised the importance of the public sector involvement in regeneration projects. Since most of the interviews were held prior to or soon after the Mayor elections, the interviewees also stated the need for a public authority to act as a strategic leader of tourism in London. The only concern was again raised with regard to bureaucracy, as one of the interviewees mentioned red-tape obstructing systematic and fast utilisation of tourism development.

The statements on private organisations, meantime, revolve around the universal opinion that they are more marketing-oriented in comparison to public sector organisations. This, as a result, forces them both to be effective and profitable suppliers within the tourism sector, and also to collaborate with other stakeholders to strengthen their competitive advantages. Among the 8 quotations attached to the code *'private organisations'*, there are two, which especially emphasise the importance of private sector organisations as direct deliverers of tourism products and services, hence raising their credibility as commercial partners in partnerships. Finally, the code *'semi-public organisations'* combine the benefits of both public and private sector organisations, but are noted to be most effective in the form of partnerships. The 9 quotations linked to the code also stress the important role played by various trade associations, boards and sub-regional partnerships. Some of the quotations attached to these three codes are as follows:

"With my public sector hat on, it is all about regeneration, and how tourism as a regeneration tool is very important in an area like this where traditional

industries have been lost forever" [London Interview: 2].

"As a private organisation, you have more freedom of manoeuvre. In a committee structure, you become much more flexible in how you do things. You are more credible in a way. It means that you can be seen to be a sort of commercial body, and can speak for the part of the industry" [London Interview: 6].

"Semi-public organisations have the advantages of both private and public sectors. First of all, you have the full backing of central government. In fact, they are one of the main funding sources... What you have then is the endorsement of the local government plus the private sector. You have tremendous advantages of the local community being actively involved in London's future. And locally, you try to attract both investment and tourism to London from all over the world" [London Interview: 14].

In addition to such general comments on the tourism organisation network, more specific remarks on the London Tourist Board (LTB) are grouped under 6 different codes: *'leading tourism authorities'*, *'lack of confidence in LTAs'*, *'lack of co-operation'*, *'overlap in responsibilities'*, *'need for more staff'* and *'need for funding'*. In fact, since the announcement of the Mayor elections and the re-establishment of the Greater London Authority (GLA) was made before most interviews were conducted, some interviewees commented on the expected role of the new Mayor to lead the tourism sector in London. Therefore, 5 out 16 quotations attached to the code *'leading tourism authorities'* was about the Mayor and the GLA, while the rest contained those opinions on LTB's effectiveness as a city-wide tourism authority. It is important to note that none of the interviewees was aware of either the plans to transform the LTB into Visit London Ltd or the new tourism strategy of the Mayor at the time the interviews were held.

The majority of the key personnel from the selected stakeholder organisations noted that they either work in close co-operation with the LTB or are a member. While there were four quotations indicating that the LTB works effectively in marketing and managing tourism in London, seven quotations were on joint projects undertaken by various organisations and the Board. All of the five quotations regarding the Mayor and the GLA, meantime, supported a uniform view that the Authority should play a leading role in tourism. By interpreting the findings of this research, it can be argued that the stakeholders of the tourism sector had high expectations of the establishment of a municipal authority and anticipated that the new Mayor would bring various stakeholders together under his leadership in order to secure a steady place for tourism in London's economy. The following quotations provide more insight into such views:

> *"The LTB is the focal point for most enquiries into London. They have lots of people and they are working hard" [London Interview: 5].*

> *"We highly support the establishment of the Greater London Authority. It would be beneficial for London businesses to have a Mayor, as it would help the continuity of the local policies. There would be one person acting as a London's ambassador which we do not have at the moment. That would be very good for London" [London Interview: 11].*

> *"The new Mayor and the Greater London Authority would be beneficial for London as a whole, because they will have enough budget to tackle London's problems" [London Interview: 16].*

As the final quotation implies, the LTB was not considered to be a problem-free organisation. Up until very recently, the BTA had been the sole authority for overseas promotion, which, as a result, caused controversy over the role of the LTB and its lack of strategic leadership. The 13 quotations joined with the code *'lack of confidence in LTAs'* comprise varying perceptions of the interviewees on the subject, but seem to establish consensus that the LTB failed to become an effective organisation laying the ground for better tourism development and marketing in London. The reasons shown for the lack of confidence in the LTB varied. With 11 quotations, the code *'need for funding'* had the highest reoccurrence during the analysis of the interview findings. As the following quotation highlights, the limited budget allocation provided to the LTB is found to confine the range of operational tasks expected from the organisation:

> *"I think one of the problems with the way that London is being marketed by the LTB is that their budget is too small to do what they are trying to do. They have been asked to represent the city which is one of the world's leading cities...They have a very small budget to market it all. They can only pick at the surface rather than identify what London really needs" [London Interview: 8].*

Another reason for the LTB's inefficiency was shown as the organisation's inability to bring different stakeholders together to work toward shared objectives. The code *'lack of co-operation'* includes seven quotations, some of which suggests that not all of the major sub-industry representatives were consulted during the preparation of city-wide tourism plans and during the launch of new promotional campaigns, which, consequently, led into resentment and rejection of some projects introduced by the LTB. The interviewees also raised their concern regarding the overlapping responsibilities of various organisations in marketing London as a tourist destination. The code *'overlap in responsibilities'* was attached to 4 quotations, one of which stressed that the fragmentation in the tourism management network prevents the responsible authorities trapped in bureaucracy from executing consistent and coherent tourism plans. Finally, the code *'need for more staff'* with 5 quotations contained such views that the LTB required qualified and highly-skilled personnel mostly at the management level, but also at the lower ranks. Again, the impediment was associated with the limited financial sources of the organisation. The following quotations cover some of the problems mentioned above:

> *"I do not want to be too critical about LTB, but I think there is a very common feeling that they do not do all that much for (the stakeholders)" [London Interview: 3].*

> *"The LTB is a hospice of weakness in a way. They cannot control anything in London. All the resources are in the hands of the private sector or controlled by other public organisations. LTB has no control over the quality of transport, the maintenance of the parking spaces... It is just there to put things into brochures... Maybe successful cities have got their marketing tight into the management of the product" [London Interview: 6].*

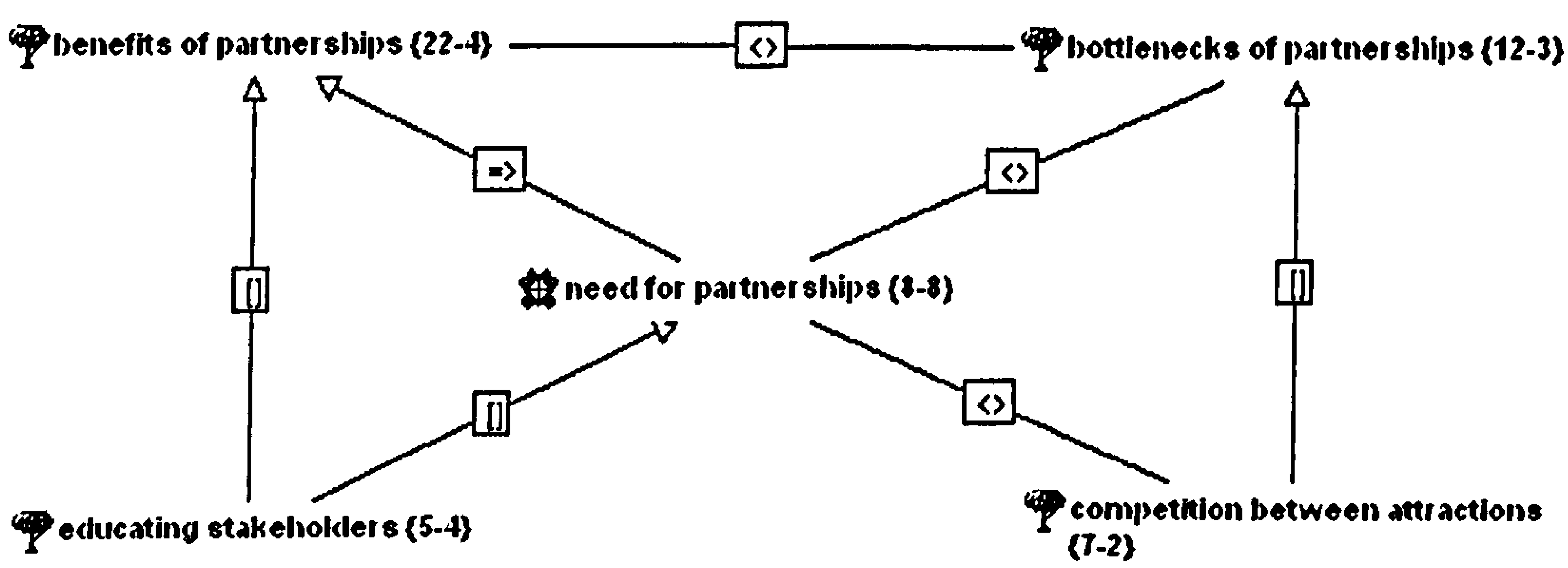
> *"If you know anything about the London Tourist Board, you also know about their financial status. They are losing money, therefore they do not have staff. Therefore, they cannot possibly hope to do everything" [London Interview: 2].*

Figure 7.1 also includes the code *'community acceptance of tourism'*, which was discussed in Section 6.4.4.2, when the quality of London's tourist product package was investigated. Briefly, the four quotations attached to the code suggest that there is no severe resentment toward tourism among Londoners, although congestion and pollution caused by large numbers of visitors in central districts are potential motives for protests against tourism. In order to assure the sustainable growth of tourism, the interviewees emphasised the importance of the utilisation of long-term plans and the use of education programmes for local people. Therefore, it can be argued that the Londoners do not pose any threat to the effective functioning of the tourism management network for the time-being, but are supportive of the sector's expansion across the city.

As noted above, the next group of codes are assembled to provide an overall framework on sector-wide collaboration in London and what importance given to partnerships by the stakeholders. Figure 7.2 demonstrates the four codes scattered around a centre code titled *'need for partnerships'*, which embraces those reasons expressed by the city-wide tourism authorities and public organisations to create a one-voice approach and also to strengthen the competitive advantage of London's total product package. As one of the interviewees summarised:

> *"Without a leading authority responsible for the tourism industry, it would not be easy to market cities. However on its own, a tourist board could not be successful to overcome all problems. Therefore all the interested organisations should be brought together and any conflict between different stakeholders should be resolved before a new tourism plan is introduced" [London Interview: 1].*

Figure 7.2. The Network of Partnerships in London



When asked about the advantages of working in co-operation, the interviewees listed several factors, all of which are gathered under the code *'benefits of partnerships'*. Considering that more than half of the London interviewees were the key managers of partnership organisations or trade associations, it is not surprising to discover that the code contains a high number of statements -*i.e. 22 quotations*-. The benefits mentioned repeatedly by most of the interviewees include:

- to bring the public and private sector together to give an impetus to tourism development through combining commercial experience with public funding;
- to work toward shared objectives and to strengthen the integration among member organisations;
- to pool efforts and resources in order to gain economies of scale in management;
- to have greater impact on target markets through co-ordinated marketing activities;
- to build up a stronger representation of sub-industries to the Government;
- to address problems experienced by members and to keep track of current trends and sectoral developments through the organisation of regular meetings and;
- to offer partner organisations a range of services, such as education and training schemes for staff, legal advice and consultancy services.

Examples of the quotations are as follows:

> *"We have been able to hold six management courses for our members... Tourism businesses were offered to put their staff on these courses for free... These courses are designed to help them market their products better, which will indirectly help us market this part of London to visitors" [London Interview: 2].*

> *"I think sub-regional partnerships help. Because, first of all, they take the tourism marketing bit out of the bureaucracy of the local authority and the committee cycle. They enable places to react more quickly and more flexibly. They cover more stream-lined organisation without keep going back every six weeks for approvals to spending... They are made more credible with the trade, if they are seen to have private sector involvement and to run more as a private sector company. Lastly, they have more credibility with the government. Because government approves the things that run like business" [London Interview: 6].*

> *"As far as the main aim of the (partnership) is concerned, it is to offer the members the best service possible whether by giving them legal advice, or by representing them in negotiations with equity and unions... My department does a lot of overseas and domestic marketing to make sure that people are aware of recent events... We also do a lot of lobbying with the government and local councils. We are trying to deal with complaints and get some help for those people who have complaints, to create a positive image of London" [London Interview: 11].*

Despite the considerable number of quotations on the benefits of partnerships, the interviewees also identified several obstacles to establishing a corporate approach among the sector stakeholders. Such views are attached to the code *'bottlenecks of partnerships'*, which consists of 12 quotations. The foremost difficulty in bringing tourism organisations under the same umbrella was noted to be the lack of vision among the administrative and managerial personnel of some organisations, who seem to misinterpret the purposes of strategic alliances and often presume that destination-wide matters should be dealt with by local authorities only.

Although the involvement and financial backing of the public sector in sub-regional partnerships were considered to encourage private sector organisations to collaborate in shared objectives, the fragmentation of the sector was shown as another obstacle diminishing the effectiveness of partnerships with a variety of organisations debating priority tasks. While each partner expects that the problems of their industry or organisation should be dealt first, the efforts to overcome conflicts were stated to have led partnerships to focus on short-term goals rather than long-term and sustainable strategies. Finally, one of the interviewees commented on the recent flourishing of partnership organisations in London, some of which were found to have overlapping tasks and missions regarding either the geographical area selected for regeneration or the sub-industries chosen as potential members. The following comments refer to some of these problems:

> *"I think the people who benefit most from membership organisations are those who do not have a strong presence themselves. It may be arrogant of us to say it, but we are big enough, we are significant enough and we are well-known enough to operate more effectively on our own rather than operating within a group of other tourism outlets" [London Interview: 3].*

> *"We have got a very diverse membership in the tourism industry. Everybody tells you that the industry itself is diverse and fragmented anyway. Therefore, it is quite difficult to get people to go on a crusade. By and large, we do not crusade, we hope to influence things rather than make dramatic changes" [London Interview: 4].*

> *"Generally speaking, (sub-regional partnerships) work very well. Some work more closely with each other, some of them are very similar wherever you go, depending on what type of work you are focusing on. Some attractions fit in, and some do not. There are also other networks...Museums, for example, have lots of different networks of their own. So, one wonders whether it is necessarily valid for (tourism organisations) to set up another kind of super-structure on top of that, which might only mean another meeting for people to go to" [London Interview: 15].*

Since the essential prerequisite for successful partnerships is to ensure that stakeholders recognise the snowballing effects of marketing a total product package, the code *'competition between attractions'* was created to verify that the interviewees support the notion of a one-voice approach. There are only seven quotations attached to the code during the analysis of the London interviews, six of which encompassed such remarks that competition within the city invigorates the success of London as a tourist destination rather than damaging the wellbeing of the sector. Only one interviewee suggested that some tourism organisations hesitate to collaborate with others in order not to relinquish their market share, especially if they target the same visitor segments:

> *"Ideally all the (tourism organisations) should get together and have a marketing budget and sell themselves as an entity. It does not happen. Because there are too many people pulling in different directions... I am not going to be advertised with (small-sized organisations). I do not want to be in the same brochure with them. Because their (products/services) are very down market. They do not reflect well on my business. So you need a separate advertising campaign. We are two or three big companies..., that could do a better cordial work... But then, we are competitors. That is the other problem. We cannot get into bed too easily" [London Interview: 5].*

The other code in Figure 7.2 is *'educating stakeholders'* and was previously discussed in Section 6.4.3.2. in reference to the quality of the total product package of London. The statements listed under the code can be summarised by stating that most of the existing partnership organisations run regular education programmes for sector stakeholders on the benefits of sector-wide collaboration throughout the process of tourism development and marketing.

To conclude, London, as the gateway destination to the country, has always been the centre of attention of the national and local tourism authorities, but systematic and consistent tourism planning was only attempted by the local authorities following the start of mass tourism in the early 1970s. While the LTB prepared a long-term strategy in 1987 followed by three-year action plans during the 1990s, the tourism organisation network in the UK has been witnessing radical changes since the start of the new millennium and in line with the proposals outlined in the DCMS' report titled *'Tomorrow's Tourism'*. In addition to the new nation-wide organisation VisitBritain, established from the merger of the BTA and ETC, the LTB has been transformed into the Visit London Ltd as the marketing agency of the strategies developed by the Mayor of London and the London Development Agency. While the long-lasting lack of a strategic leadership is now being challenged by the Mayor, a collaborative approach with the support of stakeholders during the preparation of tourism strategic plans is encouraged by both VisitBritain and Visit London both of which put a great emphasis on the importance of partnerships in destination marketing.

7.2.2. Amsterdam: Tourism versus Recreation in Planning

As mentioned in Chapter 6, one of the disadvantages of Amsterdam as a tourist destination has been the neglect of tourism in urban planning both by consecutive Dutch governments and by the municipality on a local scale. While the nation-wide urban planning with evident policy implementations in Amsterdam went through the phases of the decentralisation of urban land use in the 1970s to more compact urban growth with business and shopping districts emerging in urban fringes in the 1990s, such approaches to urban renewal have been criticised for their overemphasis on housing facilities mainly for lower-income groups rather than creating quality urban space for both visitors and residents (Burgers, 1995; Schwanen et al., 2004).

Moreover, any measure taken in response to urban planning by Governments has meant the separation of recreation opportunities for the use of residents from those tourism facilities and services offered to visitors. As Dietvorst (1993s) cites, recreation planning has been taken intensively by Dutch governments since the 1920s, and has transformed from government-led policy development of the past to more integrated and market-oriented approaches of today. While recreation is associated with culture and arts events, sports activities, public spaces, green areas and other leisure services appealing mostly to local residents, the scope of tourism was limited to the management and marketing of the attraction and accommodation industries. As often debated in the literature, it is the economic benefits of tourism, which encouraged governments to engage in planning the development of the sector so that tourism generated income could be funnelled into improving the quality of life for residents (Ashworth and Bergsma, 1987; Jansen-Verbeke and Dietvorst, 1987; Dietvorst, 1994; Beckers, 1995; Dahles, 1998).

The focus on increasing the economic potential of tourism is also reflected in the fact that the Ministry of Economic Affairs (MvEZ) has the governmental responsibility for the nation-wide planning of tourism development. Not surprisingly, the tourism plans of the MvEZ have been dominated by the objectives to stimulate tourism insofar as economic growth, employment and national financial revenues since the early 1980s (Jansen-Verbeke and Dietvorst, 1987). As the authors further note, the only objectives not related to the income generating characteristic of the sector in the 1980s were: increasing the number of accommodation establishments especially at the lower-end of the market; benefiting more from technological developments when providing tourists with accurate and instant information and; improving the overall quality of tourism products and services. The strategies with an emphasis on economic gains, meantime, focused on: capturing a larger share of high-spending long-haul visitor markets; diversifying the Dutch holiday market from international destinations to domestic ones; increasing the share of the country in the short-break market especially from those neighbouring countries like Germany and; improving the position of the Netherlands as a destination en route to the Mediterranean destinations for the Scandinavian market (Ashworth and Bergsma, 1987).

In 1991, the MvEZ published a report titled *'Enterprise in Tourism' -Ondernemen in Toerisme-*, outlining the tourism policy of the government for the 1990s (Dahles, 1998). In the plan, strengthening the Netherlands' competitive position as a tourist destination and, achieving sustainable economic growth of the sector were retained as the main objectives. While the distinction between outdoor recreation and tourism was restated in the new plan, four main areas of potential growth were identified, namely the Dutch coast; the Dutch cities, the cultural and historical attractions and; the Netherlands as an attractive country with an abundance of canals, rivers and lakes for recreational purposes. The slogan *'The Netherlands: A Country on the Water'* was heavily used in most promotional publications and different themes were recommended in attracting market segments according to varying motives of potential visitors. Amsterdam, meantime, was used as a pulling-in component of the national tourism offer along with tulips and windmills, mainly due to its gateway characteristic and popular image among existing markets (OECD, 1996).

The aims other than the ones emphasising the entrepreneurial interest of the Government in tourism-generated income and employment were about increasing the level of professionalism and co-operation in the sector, securing sustainable growth with minimal damage on environment and setting the priorities (OECD, 1996). The strategies specifically concerning Amsterdam mainly derived from the policies identified to benefit from the attractiveness of urban areas in an attempt to increase visitor arrivals. As Dahles (1998) notes, cultural heritage in urban areas was considered to play an important role in the success of the country in the international tourism market. To this end, the MvEZ, for the first time, stressed the necessity for a promotional policy focusing on cultural tourism despite the traditional belief that culture should be regarded as a means of improving the quality of life of residents rather than being packaged and sold to tourists.

Recently, the MvEZ has published a new policy report titled *'Revised Tourism Agenda' -i.e. Vernieuwde Toeristische Agenda-* introducing several action points to be initiated between the period 2003-2005 (MvEZ, 2003). As opposed to what the title implies, there seem to be very few alterations to the previous plans and the main objective remains to stimulate economic benefits of tourism. 12 key points identified are split into three groups. Under the heading of new potential growth markets, the MvEZ puts the emphasis on urban and cultural tourism, the organisation of special events, coastal resorts and business tourism. The second group of the strategies from the perspective of tourism management concentrate on the use of technology in tourism research and information delivery, crisis management plans, the encouragement of new investment and the spread of visitors and tourism business across the country. The final group of actions reviews the roles of the existing national and local tourist boards and calls for changes to their responsibilities, organisational structures and income sources.

The 12 actions identified under these headings are as follows (MvEZ, 2003):

1) to undertake a benchmarking study comparing the urban tourism products of the Northern European countries with the offers of the Netherlands in order to distinguish differences in approaches to both product development and marketing;

2) to search for new special event themes in co-operation with the municipalities, the sector stakeholders and the Ministry of Education, Culture and Science through learning from the success stories of the past events such as the Floriade horticulture show held in 2002, and to ensure the organisation of mega-events every two years starting from the already approved *'The Year of Rembrandt'* to be celebrated in 2006;
3) to enhance the appeal of seaside resorts through: improving the quality of services and products *-i.e. especially of those accommodation establishments-*; easing their accessibility; upgrading infrastructure; encouraging integration among the sector stakeholders and; promoting the resorts under new brands established in line with research projects to be executed on nature and coastal zone preservation;
4) to re-position the Netherlands as a business destination and to increase the number of international conferences, conventions and exhibitions held in the country to an extent that it becomes one of the world's top six conference destinations by the year 2010;
5) to provide initiatives to upgrade visitor monitoring systems and survey techniques so that continuous and reliable tourism statistics are available for the analysis of current trends and changing preferences of different market segments;
6) to examine the socio-demographic characteristics, needs, preferences and decision-making habits of both the Dutch and international elderly market segments and to encourage the Dutch market to chose domestic destinations to international ones;
7) to detect the shortcomings of the current tourist information services provided in the generating markets pre-travel and also in destinations during the actual stay and, to overcome these problems in joint efforts with the national and local tourism boards;
8) to spread tourism across the year and the country so that crowding does not pose any threat to carrying capacity thresholds in certain localities;
9) to study the national tourism administrative structures of the European countries and to learn from their success stories, which led them into becoming effective and respected organisations;
10) to revise the objectives, main responsibilities and organisational structures of the national and local tourism boards in the Netherlands in a way that the emphasis is put on more integrated approach in tourism development and marketing;
11) to encourage investment in tourism, especially those small-medium sized establishments, through better communication network between the sector and the concerned public authorities and;
12) to promote the Netherlands as a business location to international investors and to benefit from the synergy between the existing economic sectors when marketing the country as a tourist destination.

The new agenda acknowledges the importance of Amsterdam as a gateway destination to the country with a strong pull-in effect on the international markets. However, concern is raised with regard to the increasing competition among the European city destinations and the decreasing growth rate of the city in terms of overnight staying international visitors. It is noted that the actual overnight stays in 2003 were 10% less than targeted. In order to strengthen the city's competitiveness, repositioning and branding its tourism offer through exclusive consultation with the stakeholders and considering alternative promotion activities are recommended. Opportunities arising from the recent developments in the transportation industry, such as high-speed rail networks and *'no-frill'* low-fare flights within Europe, are considered to be worth examining in order to stress the accessibility of Amsterdam for short-haul generating markets. Finally, some of the above listed action points, such as the organisation of special events and the proposal to increase international conferences and exhibitions also induce direct effects onto Amsterdam as the leading destination of the country (MvEZ, 2003).

Despite the fact that the MvEZ has recently started to pay special attention to destination marketing and promotion, the encouragement of sector-wide collaboration and the establishment of an integrated approach in developing tourism plans, its role is still confined to the economic role of the tourism sector. The fragmentation of the sector is made even more complicated by various governmental authorities being responsible for different aspects of tourism, including the Ministry of Transport, Public Works and Water Management, the Ministry of Education, Culture and Science, the Ministry of Health, Welfare and Sport and, the Ministry of Agriculture, Nature and Food Quality. The Department of Tourism within the Ministry of Economic Affairs (MvEZ), meantime, has a limited co-ordinating capacity, which means that the implementation of policies and marketing activities is expected from both the local authorities and the national and local tourism boards, which, as in the UK, have recently gone through a transformation process and will be investigated in the following sections.

7.2.2.1. Netherlands Board of Tourism and Conventions

Due to lack of interest in tourism development and marketing among the previous Dutch governments, the first tourism authority with a responsibility of promoting the Netherlands was the Association of Dutch Tourist Boards (ANVV) set up in 1915 by the joint efforts of the privately owned tourist boards across the country. Although the ANVV received steadily increasing public grants and loans over the years for its efforts to market the country, it was soon realised that a leading tourism authority needed greater support from governments in order to effectively adopt the fast changing market trends of the tourism sector and to adjust their marketing activities accordingly. With the start of the mass tourism era in the 1960s, it became clear that a more strategic and integrated approach required to succeed in the tourism arena. To this end, the Netherlands Board of Tourism (NBT) was founded in 1968 and was made responsible for marketing the Netherlands as a tourist destination to both domestic and international markets. In 1980, the Netherlands Convention Bureau was established as a branch of the NBT, and was appointed to attract international conferences, exhibitions and conventions (VVV, 2003).

Financed partly by the MvEZ and also by the private sector members, the NBT mainly played the role of representing the stakeholders to governments and to synthesise the individual marketing efforts of the major tourism organisations in its initial years. Following the publication of the Ministry's first comprehensive tourism policy in 1991, the NBT became the agency responsible for the delivery of the marketing strategies. Throughout the 1990s, the NBT launched strategic tourism marketing plans covering three to four year periods. The first implementation plan for the period 1991-95 was understandably influenced by the Ministry's primary concern over the economic benefits of tourism, as the objectives concentrated mainly on increasing tourism revenue and encouraging international visitors to stay longer in the country. The need to upgrade infrastructure, the improvement of tourist information provision and the support of collaboration between sector stakeholders were also addressed by the Board (NBT, 1991).

The next strategic marketing plan was published in 1996 setting out the priorities for the period 1997-99. In this new plan, the targets were again set in numeric figures regarding how to increase the market share of the Netherlands along with visitor arrivals and expenditure by the end of 1999. A better distribution of visitors across the year and the country and, the attraction of high-spending market segments were the other primary objectives. The development of new, creative and innovative tourist products and services, the collection and distribution of information on visitors' preferences and expectations and, the encouragement of co-operation among the key players of the sector were identified as additional objectives (NBT, 1996).

During the plan period, the NBT chose to operate its promotional activities in a limited number of international visitor generator markets, namely Western Europe, the United States and Japan. Several other countries, including Poland, Russia, China, Brazil and South Africa, were considered as potential and emerging market segments (NBT, 1996). As argued by Dahles (1998), it was due to budget cuts on allocations received from the Ministry of Economic Affairs (MvEZ) that the NBT had to revise its marketing expenses and could no longer be involved in promotion campaigns in several countries at the same time. Moreover, while the campaigns were designed to benefit from Amsterdam as a major selling point in all of the above-mentioned market segments, the intention of the Board was to use the city as an entry point to the Netherlands before visitors are diverted to elsewhere, such as seaside resorts and other city destinations.

Unaccomplished targets and fierce competition threatening the market shares of both the Netherlands and Amsterdam have triggered attempts to restructure the leading tourism authorities since the mid-1990s. The overlap in responsibilities and the fragmentation of the organisations involved in tourism marketing, first led to the establishment of the Dutch Tourism and Recreation Foundation (STR-AVN) -*Stichting Toerisme en Recreatie AVN*- in 1995. Bringing together various trade associations and the sector stakeholders under its leadership, the STR-AVN aimed to orchestrate the marketing activities of its members and to enhance the effectiveness and efficiency of domestic tourism marketing through strategic planning and implementation. As one of the main funding partners of the STR-AVN along with the ANVV and the Royal Netherlands Tourist Association (ANWB), the NBT ceased its activities targeting domestic markets and concentrated its efforts on international tourism marketing (OECD, 1996).

The revision of the STR-AVN's performance in the fourth year of its existence suggested that sharing marketing responsibilities between national and regional tourism authorities meant duplication of efforts and wastage of resources, as the country struggled to maintain its market share with the number of overnight staying visitors declining (Geerts, 2000). The national structure of tourism authorities was, once again, questioned, while the MvEZ conducted research on the effectiveness of the STR-AVN and the NBT and, also on the new approaches adopted by the European countries to restructure their own tourism networks. As a result, the STR-AVN and the NBT were brought together in 1999, and the name of the new organisation was changed to the Tourism Recreation Netherlands (TRN) -*i.e. Toerisme Recreatie Nederlands*-. Although domestic and international tourism marketing were now united under the same roof, the distinction between tourism and recreation was again underlined when labelling the new organisation. While the word *'tourism'* referred to marketing the Netherlands as a destination outside the country, *'recreation'* meant setting separate priorities for the citizens taking holidays at home (MvEZ, 2003).

The MvEZ provided €22 million to the organisation in 2003, whereas the membership fees generated from private sector organisations equalled to the half of public funds. In order to assure that key players played an active role during the implementation of policy actions, regular meetings and consultation platforms were organised to understand the expectations and needs of the sector as a whole and of its sub-industries as components of the overall product package. In fact, the primary objective of the TRN was identified as to stimulate an integrated approach towards destination marketing by encouraging the sector stakeholders to work in partnerships. As in the merging of the British Tourist Authority and the English Tourism Council, the cohesion of the national and regional tourism boards was expected to facilitate the process of collaboration under the strengthened leadership of the TRN (MvEZ, 2003).

In July 2001, the Netherlands Convention Bureau joined the TRN, which, in January 2004, changed its name to the Netherlands Board of Tourism and Conventions (NBTC). Having sole responsibility for marketing the Netherlands to international, domestic and MICE -*i.e. meetings, incentives, conferences and exhibitions*- markets, the organisational structure of the NBTC now comprises four main departments reporting to a Managing Director. These departments are: Executive Secretary and Communication Relations; Strategy and Corporate Services; Finance and Control and; Human Resources. Under the management of these departments, the marketing responsibility is shared within three divisions, each specialising on a different market segment, namely the non-profit sector, the tourism market and the MICE market. Other divisions are responsible for the management of: the NBTC establishments; information and media services and; research and product development (*see Appendix 25 for the organisational chart of the NBTC*). In addition to the head office based in Leidschendam, the NBTC is represented via its 12 international offices in the major visitor generating countries for the Netherlands, including Belgium, France, the UK, Germany, Spain, Japan, Taiwan and the USA (VVV, 2003).

The priorities identified for planning and marketing tourism by the Ministry of Economic Affairs (MvEZ) has been retained, as the NBTC has taken over the objectives initially assigned to the TRN. The strategic actions for implementation are classified under four key areas: knowledge; innovation; marketing and promotion and; distribution and information. The NBTC is appointed to accomplish the following group of aims associated with each of these areas (MvEZ, 2003 and www.holland.com/corporate accessed on 29 April 2004):

1) Knowledge:

- to monitor developments on the demand side by in-house research and via an international network of twelve offices;
- to monitor trends and processes, which are of interest to the tourism and leisure product, in co-operation with the sector stakeholders;
- to provide links with other knowledge centres;
- to act as a broker and intermediary;
- to propagate knowledge, and;
- to use international benchmarking and effect management.

2) Innovation:

- to improve and innovate the marketing process by working together with the stakeholders;
- to stimulate product development;
- to monitor developments and opportunities;
- to develop and encourage a one-voice approach;
- to try to find (new) sources of finance;
- to offer support to the tourism and leisure sectors;
- to broaden networks, and;

- to enhance co-operation with provincial and regional tourist information offices.

3) Marketing and Promotion:

- to promote the Netherlands actively and effectively in the main international markets, and;
- to position products/markets combinations in the relevant markets, using innovative marketing products.

4) Distribution and Information:

- to improve the business and convention management services of the local tourist information offices and the NBTC;
- to enhance the specific multi-channel distribution through joint efforts;
- to make efficient use of the offices abroad and their relations;
- to make efficient use of the local tourist information offices and the ANWB distribution channel, and;
- to develop the role of Internet and other new media tools.

To conclude, the problem, in the case of the Netherlands stems from the neglect of the tourism sector by both the Government and the local authorities in the past and also the insistence of the MvEZ to appraise tourism only within its economic means. Although a thorough analysis of the practised transformation of tourism authorities in the European countries has been completed by the Ministry, it can be argued that a nation-wide organisation established according to the lessons learnt from the previous experiences could have provided more insight into the type of organisation needed for effective and successful tourism marketing and planning. The co-operation among the sector stakeholders and the public authorities is now being challenged by the NBTC, but it is still too early to draw conclusions on how successful the organisation is and will be in creating a one-voice approach leading to the recovery of the tourism sector in the coming years.

7.2.2.2. Amsterdam Tourist Board

The first tourism authority established in Amsterdam was the Amsterdam Tourist Office set up in 1902 as a small bureau providing basic information services to international visitors. With visitor figures increasing from 440 international passengers arriving at the Schiphol Airport in 1917 to 110,000 international overnight stays in 1927, the Office's responsibilities expanded over the years. The organisation conducted its first visitor survey in 1938 in order to elucidate the main purpose of visit to the city among international visitors. The results showed that the most visited attractions were the Rijksmuseum, diamond factories and canal boat tours. Despite the interruption caused by the World War II, the growth of tourism continued until the consequent economic recessions of the 1970s and the 1980s. By the beginning of the 1990s, Amsterdam was already suffering from the declining growth of visitors and the impaired image. Therefore, it is not surprising that the Amsterdam Tourist Board (VVV), which completed its transformation from a rudimentary tourist office to an advanced and composite organisation during the late 1980s, has been involved in strategic marketing and planning since the early 1990s (VVV, 1994).

In 1993, the VVV and the MvEZ commissioned exclusive visitor research from the KPMG Consultancy. The findings provided the basis of the VVV's first strategic plan to market Amsterdam, titled *'Memorandum Amsterdam and Tourism' -Nota Amsterdam en Het Toerisme-* (VVV, 1994). The objective of the VVV, as highlighted in the plan, was to develop new approaches to reinforce Amsterdam's tourist product package and to market the package effectively and consistently. In line with this broad objective, the action points, which were to be accomplished during a three year period between 1994-1997, were split into two main categories: the product and management aspect of tourism and; marketing Amsterdam as a tourist destination.

On the supply side, the plan stressed the importance of raising understanding of the product package concept among the stakeholders, and encouraging collaboration between the sector and the local authorities. The organisation of regular special events were recommended to overcome the lack of a major landmark attraction with a pull-in effect on potential visitors. The most detailed actions regarded the accessibility of Amsterdam and the transport alternatives for visitors within the city. The provision of specific information on parking spaces, the initiatives to entice the use of public transportation modes by visitors and the improvement of signposting across the city were among those actions listed under the heading *'accessibility'*. The last section on the supply side was on attractions and the general atmosphere of Amsterdam. The extension of opening hours for tourist attractions and shops in the city centre, the provision of information on attractions in the languages of major international market segments, the co-operation with police forces to reduce crime rates and, the upgrading of infrastructure services across the city were covered in this last section (VVV, 1994).

The overall aim of the actions in the marketing section was to shift from product-oriented marketing to customer-oriented marketing and promotion of the city. It was argued that the intangible criteria including the friendliness of residents and the tolerant atmosphere should be highlighted in promotional activities more than the tangible aspects of the tourism sector. As the NBT acknowledged the importance of Amsterdam as a gateway destination to the rest of the country, the joint marketing activities with the national tourism organisation was thought to reinforce the effectiveness and reliability of the efforts held in international markets. Finally, the research conducted by the KPMG indicated that there was a considerable difference in the way that the image of Amsterdam was perceived by potential and actual visitors, with the last revealing more positive attitudes and beliefs on what the city has to offer. Therefore, the VVV aimed to transform the perceived image of the city in a way that the possible misconceptions of the potential market segments are replaced with the experiences of the actual visitors (VVV, 1994).

In 1997, the VVV prepared a new plan titled *'Strategic Marketing and Communication Plan'* covering the period 1998-2000 (VVV, 1997). In addition to the emphasis put on the integration of tourist products and services within the concept of a *'product package'* in the previous plan, this new strategy attempted to increase visitor numbers and expenditure through packaging Amsterdam with other destinations. The tarnished competitiveness of the city as opposed to other European cities led the VVV to investigate the possibilities of marketing Amsterdam in a package with other major Dutch cities, including Rotterdam, The Hague and Utrecht. In accordance with the packaging of big cities for international markets, widespread co-operation was sought to promote the city as the pivotal component of the North Holland region to domestic visitors.

As the title of the plan indicates, the action points listed were mostly marketing-oriented and were split under two headings, namely the major target segments and the promotion of Amsterdam. It was noted that the intensive international marketing in a number of selected countries would be a more effective way of promoting the city than the dissemination of efforts and resources onto all potential visitor generators. The VVV, firstly, classified visitors according to their purpose of visit and aimed to concentrate its marketing activities on leisure break, business, cruise passenger and day-visitor markets. Secondly, the main visitor generating countries with already large shares in actual arrivals were found to be the US, Italy, France, the UK and Spain, where the VVV was committed to carry out further promotional campaigns. Scandinavia, Switzerland, Austria, Eastern Europe, Belgium, Australia, New Zealand, Far East, Israel and Canada, on the other hand, were considered to be growing markets, where the marketing activities would be designed for intermediary organisations and business visitors rather than individuals. Finally, the markets with a potential to grow in the long-term were identified as South Africa, South America and Middle East, for which the VVV would run a limited number of activities during the plan period (VVV, 1997).

The actual handling of the international marketing activities was assigned to the NBT, which, in co-ordination with the VVV, was to set up a promotional campaign for Amsterdam and, subsequently, to conduct research to measure its impact on the decision-making process of visitors. The marketing tools selected to accompany promotional campaigns in the leading target countries were advertisements in printed media and public relations. The campaign designed for the domestic market called *'Amsterdam: The World City'* was allowed to continue aiming to stimulate visitor arrivals through raising the image of the city. All of these marketing activities were to be supported by the information services provided by the VVV, which aimed to take immediate actions to upgrade its information network through the wide use of computerised services and internet (VVV, 1997).

Other action points related to the issues other than marketing were the repetition of those listed in the previous plan and were on: product development; the encouragement of collaboration among the sector stakeholders; the organisation of special events; the improvement of urban infrastructure; easing accessibility; the diffusion of visitors across the city and the year and; the search for new income sources while securing at least the present level of public funding. Overall, the plan put great emphasis on sector-wide co-operation under the leadership of both the NBT and the VVV and, concentrated on promoting Amsterdam as a cluster of products and services under the themes: culture and arts; business tourism; shopping and; events and festivals (VVV,1997).

The sequel of the plan was published in 2000 and covered the period 2001-04. On the foundations laid by the previous plans, the VVV concentrated much more on the needs and expectations of potential visitors during the planning process and highlighted the current international trends shaping the demand aspect of urban tourism. According to the survey conducted by the Board, visitors to city destinations often search for (VVV, 2000a):

- authenticity
- adventure
- vibrancy
- comfort
- accessibility
- uniqueness
- information
- diversity
- surprises
- recreation
- relaxation
- quality
- good packaging
- functionality

Upon examining these aspects and their applicability to Amsterdam, the VVV determined three key themes to focus on in its recent marketing activities: quality, uniqueness and sustainability. While uniqueness and quality arguably take visitor needs and expectations into account, sustainability is desired for the optimal growth of tourism with minimal damage caused by the sector onto the physical, social and economic environments of the city. In fact, given the fact that Amsterdam has long been suffering from a declining growth of tourism, the VVV set a new target of 3% annual increase in overnight stays. Moreover, by underlining the unique and quality products and services offered within the tourist package, the organisation aims to be involved in effective and propitious marketing activities so that Amsterdam keeps its place among the leading ten European cities ranked annually according to the total number of visitor arrivals (VVV, 2000a).

There is no alteration made regarding the classification of target market segments and the marketing tools to be used in this new plan, which it is again argued to be prepared with a visitor-centred approach. The strategies on product development and planning support the ones on marketing and the VVV puts greater emphasis on the quality of tourist products and services. The action points of this new plan are listed below under three main headings (VVV, 2000a):

A) **Management**

1- To understand the needs and expectations of potential visitors and to engage in marketing efforts with a visitor-centred approach;

2- To co-operate with the destinations in North Holland and to support the growth of tourism in the region via the implementation of strategies serving shared goals;

3- To initiate necessary actions to assure the consistency and stability of the partnerships among the stakeholders;

4- To work in close co-operation with the City of Amsterdam and the NBTC in order to raise the profile of Amsterdam as a tourist destination and to encourage the financial support of the authorities in both product development and marketing;

B) **Strategy and Planning**

5- To disperse visitors across the year and the city in order to minimise the negative effects of seasonality;

6- To investigate the potential of cultural tourism in co-operation with the Amsterdam Culture Bureau (AUB), in order to increase visitor numbers in winter months;

7- To appraise the recent trends in the tourism sector and to identify the areas where Amsterdam needs further development;

8- To investigate the possibilities of developing new landmark attractions in the city or within its close surroundings;

9- To introduce initiatives to improve the quality of tourist products and services offered across the city;

10- To assist the stakeholders with expertise knowledge and information on innovative product development;

C) **Marketing**

11- To engage in marketing activities in a combination of markets, where the motives, origin markets and demographic characteristics of visitors are dissimilar, so that the risk of overemphasis in one market is eliminated;

12- To participate in trade fairs in association with the NBTC;

13- To continue with the *'Amsterdam: The World City'* campaign targeting the domestic market;

14- To assess the benefits of *'niche-marketing'* with a cluster of products and services packaged with particular themes;

15- To expand the use of internet and other computerised systems in providing information to potential visitors;

16- To design advertisement campaigns for printed media in all of the target markets, and to organise familiarisation trips in joint work with the NBTC and the stakeholders;

17- To continue with the campaigns *'Amsterdam Arts Adventure'* and *'Amsterdam Winter Adventure'* providing that continuous financial support is secured by the City of Amsterdam and the participating organisations;

18- To conduct regular visitor surveys and to upgrade the visitor information databank where accurate and in-depth information on diverse markets is available for effective analysis;

19- To encourage the organisation of special events and to assist their promotion in international and domestic markets and;

20- To promote the *'Amsterdam Culture and Leisure Pass'* in its new electronic format.

As these action points indicate, the VVV approaches policy formulation and setting priorities to promote Amsterdam mostly from a marketing perspective. This could arguably be attributed to the private organisation status of the Board, which relies solely on the income generated from membership fees and commercial activities. The support of the public authorities, including the City of Amsterdam and the NBT, meantime, is mainly indirect and limited by the provision of grants and loans for specific projects rather than regular and constant budget allocations. In fact, as mentioned above, the VVV has recently entered a new era in its evolution as an organisation, and is now a holding consisting of five establishments (VVV, 2002). These establishments are (*see Appendix 26 for the organisation chart of the VVV*):

- The Amsterdam Tourist Office Inc., responsible for the management of tourist information centres across the city;
- The Holland Tourist Information Inc, which is the tourist information centre based in Schiphol;
- The Amsterdam Reservation Centre Inc., which assists individual visitors and groups with the bookings of accommodation, excursions, attractions and special events as well as dealing with the telephone and e-mail inquiries;
- The Amsterdam Leisure Consultancy Inc., which provides expertise services to tourism businesses and investors and;
- The Amsterdam Marketing and Data Centre Inc., responsible for the collection and assessment of visitor surveys as well as the policy formulation on product development and marketing.

To conclude, the VVV has been consistent in the identification of long-term strategies and the delivery of the action points via mid-term plans since the early the 1990s. The organisation has determinedly concentrated on the expectations and needs of potential visitors in order to restore the competitive advantages of Amsterdam. The organisation of frequent special events to overcome the lack of a major landmark attraction, the concentration of marketing activities in a finite number of leading visitor generating countries, the harmonisation of potential market segments, such as cruise holiday, business and culture markets, with the well-established youth market and, the packaging Amsterdam with other destinations in the country are some of the aims pursued over the last 10 years at least.

However, whether such persistence has helped Amsterdam to recover from the insistent problem of lost share in the European market is debatable. One can argue that the problems faced by the city are mainly due to the belated interest of the public authorities in tourism planning and development, who have, consequently, failed to reconstruct the impaired image of the city. Yet the tourism authorities have been going through a transformation process over the last few years and the national and local tourism plans are now in line with each other, albeit the Government's sole interest in the expected catalyst role of tourism. There is no doubt that destination planning heavily relies on the integration of not only the sub-industries of tourism, but also other economic sectors, social and cultural systems and the administrative networks of an urban area. Partnerships and co-operation among the leading players are undoubtedly crucial for the long-term success of Amsterdam. The following section includes some examples to such partnerships along with some other organisations, who someway influence the functioning of tourism in the city to a certain extent.

7.2.2.3. Partnerships, Associations and Other Key Players as Marketers of Amsterdam

The equivalent of the English Tourism Council is the regional associations of privately run local tourism boards in the Netherlands. The Amsterdam Tourist Board (VVV) is a member of the Tourism North Holland (TNH) *-Toerisme Noord-Holland-*, which brings 27 local tourism authorities in the region together. The primary aim of the organisation is to represent its members to the Government, sector stakeholders, international intermediaries and investors and, to stimulate tourism growth in North Holland. From the perspective of product development, the responsibilities of the TNH are finite and restricted with the provision of guidelines to local organisations and the collection of region-wide tourism statistics from the surveys conducted by individual members. In terms of marketing, the TNH participates in trade fairs, publishes and distributes brochures on holiday opportunities in North Holland, and co-operates with the NBTC in international marketing (VVV, 2003). Although the importance of Amsterdam as the leading tourist destination of the region is evident in the TNH publications, it is also clear that the greater emphasis is on using the city's appeal in pulling visitors into the North Holland before they are encouraged to discover the alternatives offered outside the city (VVV, 1999).

On a local level, the City of Amsterdam (CoA) plays an important, but an indirect, role in the implementation of tourism policies as a planning authority. The VVV seeks the co-operation of the municipality especially with regard to its strategies on product development, since the CoA is responsible for the management of public spaces and green areas in addition to its remit for setting physical planning objectives for the allocation of urban land (Dietvorst, 1993a). Nevertheless, as Dahles (1998) cites, the municipality has often been criticised for its neglect over tourism, which has consistently been last on the local authority's list of priorities. Besides, similar to the approach adopted by the Ministry of Economic Affairs (MvEZ) on a national scale, the CoA separates recreation from tourism, and has been more keen to invest in new facilities and opportunities for the use of residents than visitors.

Various reports published by the municipality since the beginning of the 1990s acknowledge the contribution of tourism to the economic development of Amsterdam, but are trapped in the assessment of the sector by its economic means only. As Dietvorst (1994) notes, the overestimated economic effects of tourism regarding expected visitor arrivals and income, resulted in several initiatives offered to ad hoc development projects, while neglecting the long-term objectives of sustainable growth. Dahles (1998) further argues that tourism was seen as a sector providing low-paid, low-skilled and seasonal jobs by the policy makers of the CoA. Therefore, the city-wide planning reports tended to focus more on issues like housing, security, transportation, social services and infrastructure facilities than tourism development. The development of cultural and recreational activities was handled with more care by the municipality, as they were associated with the improved quality of life for local people.

Recently, the Welfare Department of the municipality has published a cultural policy entitled *'The Long-Term Vision and Cultural Plan: 2005-2008'* -*i.e. Langetermijn-visie en de Uitgangspuntennotitie Kunstenplan: 2005-2008*-. The policy, which emerged from consultation meetings with the representatives of key organisations, aims to promote cultural life in Amsterdam and to ensure local government support for museums, theatres, concert halls and other cultural establishments. The policy covering a period of three years will be followed by consequent mid-term plans as components of a long-term vision extending to 2015. In the long-term, the CoA aims to achieve five main objectives (CoA, 2003a):

- to boost civic pride among residents through encouraging them to participate in cultural activities, which would, as a result, attract new residents to Amsterdam;
- to develop an environment, where creative and innovative businesses are supported to function effectively and progressively;
- to preserve the rich cultural inheritance of Amsterdam for future generations;
- to retain and strengthen the unique position of Amsterdam as the cultural capital of the Netherlands and;
- to promote Amsterdam to cultural establishments and institutions across the world in order to reinforce its competitiveness in the international arena.

Alongside this cultural policy, the CoA prepares similar action plans for the development of recreation and sports activities in Amsterdam. In fact, various measures are taken in such plans to improve the infra- and supra-structure of the tourism sector ranging from upgrading transportation services to revitalising museums. However, the municipality still leaves the responsibility of tourism planning and marketing to the VVV, which receives funds and grants from the CoA. The organisations also join their efforts and sources for particular projects and the tourism offices of the municipality are appointed to represent the local government in the VVV meetings. One of the recent projects that the VVV and CoA have pioneered in co-operation is a promotional campaign called *'Amsterdam Surprise'* focusing on the diversity of the city and on its unique and distinguishing features, such as the longest pipe, the largest diamond and the narrowest house in the world (CoA, 2003b).

Two other organisations, which engage in city-wide promotion activities, are the Amsterdam Convention Bureau (ACB) and the Amsterdam Partners, formerly known as the Amsterdam Promotion Foundation (AMPRO). The ACB offers advice on conference and exhibition facilities of Amsterdam to event planners and international organisations, and publishes promotional material including the annual conference manual enlisting various conference venues, exhibition halls and accommodation establishments along with the leisure opportunities for delegates to enjoy outside meeting hours (VVV, 2003). The ACB is an association consisting of 150 business members as well as the representatives from the CoA, the VVV, the Chamber of Commerce and the University of Amsterdam. The organisation is managed by a small team of four personnel including a managing director, an executive secretary, an account manager and a project manager (ACB, 2003).

Amsterdam Partners, meantime, is the inward investment agency of Amsterdam and tries to raise the city's profile as an international economic centre both inside and outside the Netherlands. The foundation, which is funded by membership fees and grants and loans provided by the CoA and the Chamber of Commerce, aims to co-ordinate the marketing activities of its members and to promote Amsterdam to the investors and decision-makers of the international business community. Tourism is often used in the promotional material of the foundation in order to emphasise the quality of life for residents as well as to attract investors to launch new tourism organisations in the city. The US, Japan, France, the UK and Germany are the main target countries of Amsterdam Partners, which uses media, embassies, consulates and trade associations as the means of information distribution (AMPRO, 1998).

The administrative office of the foundation comprises a city marketing manager, a festivals and event manager, a network manager and a team of project co-ordinators. While the marketing activities of Amsterdam Partners are directed at positioning Amsterdam as a unique city with a combination of *'creativity, innovation and commercial spirit'*, some of the most used marketing tools include the publication of magazines, the production of communication media, the distribution of regular press releases, the organisation of special events and the arrangement of trips for local businessmen to abroad, and for foreign investors to Amsterdam. Recently, the foundation has announced that the city's position as a knowledge, business and residential city will be further exploited in promotional materials in association with its well-known identity as a city of culture, canals and meetings (Amsterdam Partners, 2004).

Among the trade associations, probably the most important in terms of city-wide tourism marketing and planning is the Association of Dutch Travel Agents and Travel Organisers (ANVR). The main objective of the association, which was established in 1966, is to orchestrate the forces of its affiliated members to promote their collective social and economic interests. Its importance in relation to the main concern of this research, however, derives from the fact that its members create destination packages by bringing together various tourist products and services and promote them both nationally and internationally. While the association works in co-operation with the MvEZ and the NBTC, Amsterdam, as a gateway to the country, is given priority in destination-related interests of the ANVR (ANVR, 2003).

Since Amsterdam is a compact city, there are no such sub-regional partnerships like those found in London to develop and promote tourism within particular city districts. However, there are some sectoral partnerships bringing together tourism businesses targeting the same markets. The Museum Quarter and the Diamond Group are two examples. While the Museum Quarter represents some of the major tourist attractions including the Film Museum, Stedelijk Museum and Van Gogh Museum, catering establishments and shops, based in the surroundings of Museumplein, the Diamond Group is the association found by the leading and largest diamond-polishing factories in Amsterdam. Both of these organisations publish leaflets, brochures, booklets and posters to attract visitors during their stay in Amsterdam, while they support the NBTC and the VVV for their activities of domestic and international marketing.

Before the analysis of the interview findings from Amsterdam is discussed in the next section, it should be noted that KLM, the national airline of the Netherlands, and the Amsterdam Chamber of Commerce have been continuously involved in tourism planning both on national and local scales and have been supportive of the strategy implementation programs. The interest of KLM in tourism planning and marketing is clear as more international visitors, especially those from long-haul destinations, would, to a certain extent, have a positive effect on the business of the organisation. Meantime, due to the fact that membership of the Chamber of Commerce is compulsory for private organisations in the Netherlands, the authority represents a wide range of establishments operating in all sorts of economic sectors. Therefore, in addition to its task to lobby the interests of their members in the public authority circles, the Amsterdam Chamber of Commerce is the funding member of various associations and partnerships and takes proactive roles in urban policy formulation to improve the business environment of the city (Geerts, 2000).

7.2.2.4. Interview Findings on The Tourism Management in Amsterdam

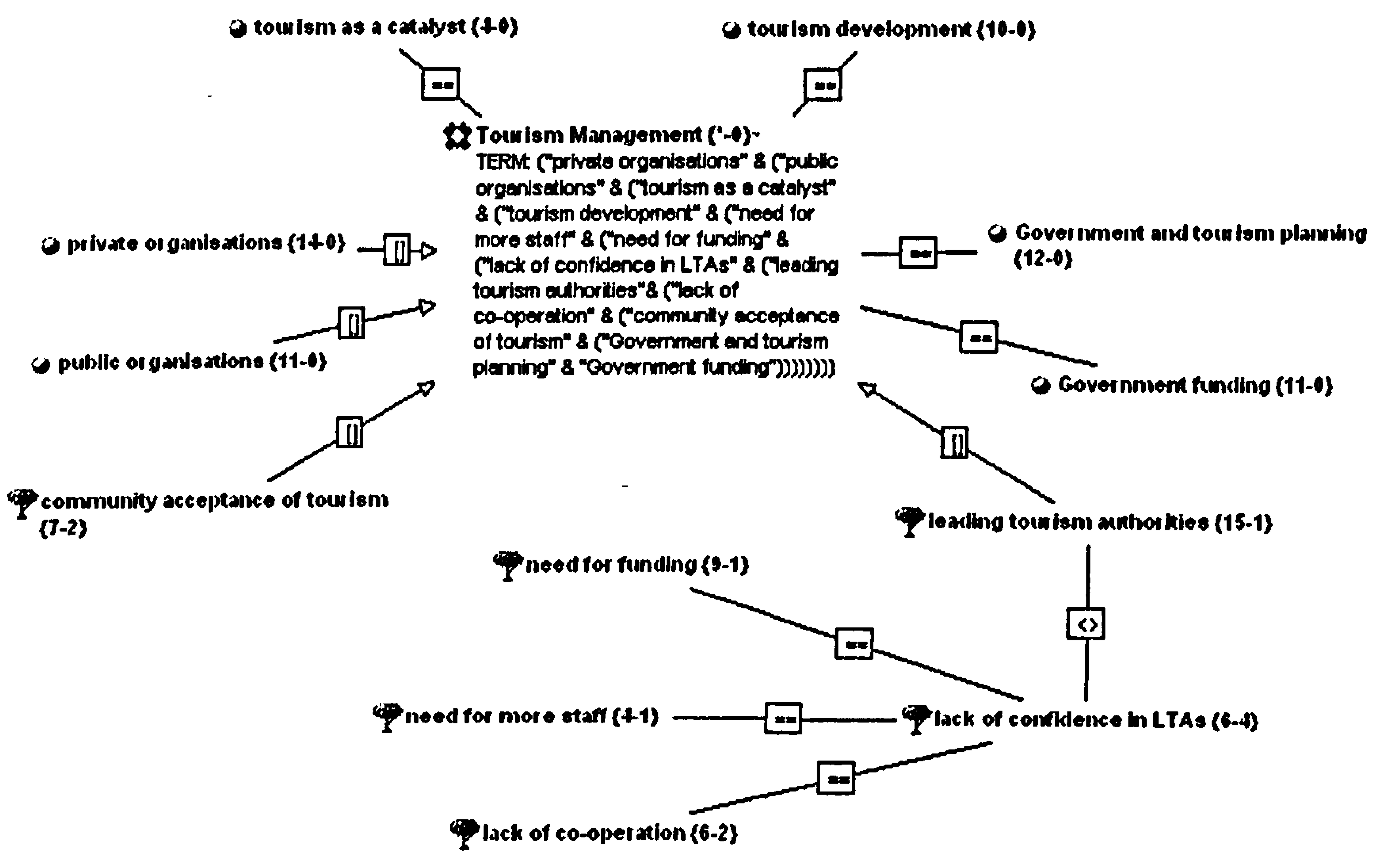
As with the findings from London, the codes related to the development and planning of tourism in Amsterdam are split into two networks. The first network on tourism management includes a key code called *'Tourism Management'*, which embraces twelve codes, which are *'tourism as a catalyst'*; *'tourism development'*; two codes on private and public sector organisations; two on the involvement of the Government in tourism development *-i.e. 'Government and tourism planning' and 'Government funding for tourism'-*; the code titled *'leading tourism authorities'* and the four codes associated with the effective functioning of these authorities *-i.e. 'lack of confidence in LTAs', 'need for funding', 'need for more staff', 'lack of co-operation'-*; and the one representing the attitudes and perceptions of the local residents toward tourism development: *'community acceptance' (see Figure 7.3)*.

The only two codes, which are found in London's network and are missing in Amsterdam's, are *'semi-public organisations'* and *'overlap in responsibilities'*. The fact that the tourism authorities are private organisations in the Netherlands explains, to a certain extent, why the interviewees did not refer to the benefits and bottlenecks of semi-public organisations. Their concerns regarding private and public sector alliances, meantime, are assessed in relation to the necessity for co-operation for tourism development under the second network of partnerships. The lack of the code *'overlap in responsibilities'*, meantime, can be explained by the neglect of tourism by public authorities and with the recognition of the tourism authorities, the NBTC and the VVV, as the leaders orchestrating the integrated tourism planning and marketing in the city.

In Amsterdam, the quotations attached to the code *'tourism development'* differ remarkably from those responses of the London interviewees. In contrast to the overemphasis on the economic benefits of the sector in the Government publications, only three out of 10 quotations were to do with the multiplier economic effects of tourism onto the urban economy. Instead, the majority of the interviewees stressed the importance of tourism development in its association with the product package concept, where planning and marketing efforts should attempt to fulfil the needs of sub-industries as well as those of visitors through harmonising numerous products and services within a comprehensive and propitious destination offer. Two interviewees also mentioned that tourism development should be taken into account more in the sense of providing initiatives to build new tourist attractions and tourism establishments rather than simply improving the existing offer. However, the compactness of Amsterdam and the scarce and expensive urban land were considered to restrict development in the city centre. The quality of tourist products and the importance of long-term sustainable growth were only mentioned by one interviewee in Amsterdam, where two interviewees from the City of Amsterdam (CoA) confirmed that the municipality continues to separate tourism from recreation in its policies. Some examples of these quotations are as follows:

> *"One of the major problems of Amsterdam is that it has got a very limited landscape for new developments. The city centre with historic buildings does not leave any room for new buildings... There are plans to improve the southern ring of the city around the Artis Zoo. But even there, it is difficult to find empty space. The ones available are either small or too expensive. So, there is not much you can do about this problem" [Amsterdam Interview: 1].*

Figure 7.3. Tourism Management Network in Amsterdam



> *"You definitely need to consider what sort of visitors you want in Amsterdam, and what they want to experience here. So that you can improve your package offer to meet their expectations. But you also want to build new attractions and hotels to reach both ends of the market and to expand your visitor profile" [Amsterdam Interview: 12].*

> *"Tourism in Amsterdam is about its culture, heritage, museums, historic buildings and all other distinctive characteristics... These elements are brought together and marketed to visitors. That is why these elements need to*

be safeguarded, so that tourism can continue to grow non-stop... Once you ensure that the core elements of tourism are protected, then they generate continuous economic benefits for the whole city" [Amsterdam Interview: 14].

The code *'tourism as a catalyst'* contains less than half of the 9 quotations attached to the same code in the case of London. One of the reasons may be because Amsterdam is a smaller urban area in comparison to London, where the regeneration of outer districts through tourism development may not have been considered as crucial due to the lesser degree of imbalance between the inner-city and the fringes. While three out of the four quotations referred to the economic benefits of tourism, it is important to note that these remarks were raised by the interviewees representing the local authorities, whose plans and strategies are dominated by the economic meanings of the sector. One of the interviewees said that various initiatives were provided for regeneration projects outside the city centre and mostly along the IJ waterfront, but tourism development is not always welcome by the outer boroughs in order so-called residential areas to keep free from congestion and pollution caused by the density of visitors and tourism businesses:

"The tourism industry is concentrated in the historic city centre. The potential of the suburbs and the hinterland is overlooked. Maybe this is only right. Developing tourism is all about money. Besides, some of the suburbs do not want tourism in their area. They do not want big hotels or attractions, as that would mean attracting a large number of visitors in primarily residential areas. However, the municipality has been trying to regenerate some areas within the near surrounding of the harbour, by providing initiatives for tourism development. It starts from behind the Central Station, goes all the way along the banks of IJ" [Amsterdam Interview: 8].

The views of the interviewees with regard to the involvement of the Government in tourism policy making and development were more judgmental in Amsterdam than in London. Half of the 12 quotations attached to the code *'Government and tourism planning'* concerned the neglect of tourism by public authorities, while three interviewees suggested that the consecutive governments and the municipality had failed to establish a long-term strategic plan inducing sustainable and prosperous tourism growth. Two interviewees argued that the Government may be purposefully discouraging the constitution of consistent and coherent tourism plans for Amsterdam due to the fact that the carrying capacity of the city would be endangered by more visitors arriving especially during the peak seasons. One of these interviewees even added that the Government may be benefiting from the negative image of Amsterdam as an unsafe destination of *'sex and drugs'* in keeping the total visitor figure at its existing level.

There were also statements regarding the collaboration between the public and private stakeholders during destination-wide planning process and the lobbying activities of various associations and foundations in order to provide the Government with up to date information on the trends and developments taking place in both the supply and demand sides of the sector. Overall, the support of the Government and its co-operation with the major private organisations was found imperative for the success of the sector. Finally, one of the interviewees stated that Amsterdam is often taken granted by the policy-makers, who are more concerned to divert visitors across the country rather than serving the needs of the city to strengthen its competitiveness. The following quotations summarise some of these views:

> *"We have a Ministry of Economic Affairs. Within this Ministry, there is a tourism department, which prepares national tourism plans which does not necessarily include strategies and tactics. It is more like a guide for tourism offices, local governments and the NBT. I do not really think that it would have been any better if we had a separate ministry just for the tourism industry. It would just be a matter of title. They would still be involved in same sort of activities" [Amsterdam Interview: 2].*

> *"Perhaps, (the failure of Amsterdam as a tourist destination) was honestly encouraged by the government, which has never been very concerned about tourism. They were making plans for the city as a social place, but those plans were not necessarily tied into the needs of the tourism industry... Who can be blamed for this situation? Why are we looking for someone to blame? Tourism is a rejectable option. You do not have to develop tourism, if you do not want to. There are a lot of tourists in Amsterdam. But, there is a good level of resistance, too. Most probably, the local authorities are aware of the benefits of tourism, which can alleviate some of the economic and social problems of the city... But, they have also not prepared tourism policies, which shows that they do particularly want tourism to grow too much in the city. Considering how the city has suffered from the riots of other places, you would have expected the Government to be more convinced about preparing strategic tourism plans. But, they have not done that" [Amsterdam Interview: 6].*

Since most of the interviewees agreed that the Government was not wholeheartedly involved in tourism planning, they did not expect the provision of public funding for new developments to be sufficient and abundant. In fact, four statements linked to the code *'Government funding for tourism'* regarded the lack of public subsidies, while one interviewee referred to the tourist tax charged to visitors via tourism establishments across the city and only 1% of it being returned to the development and marketing of the sector. Although the City of Amsterdam (CoA) was mentioned as supporting tourism associations and foundations financially and also by becoming their founding partner, two interviewees added that the public authorities should be playing a more proactive role in both implementing city-wide tourism policies and funding the development of the sector. Instead of an affirmed and continuous financial backing of the sector through annual budget allocations, the public grants and loans were said to be for particular projects only and of a temporary nature. The following quotations pinpoint some of these concerns:

> *"(The municipality) subsidises the VVV... I think it was two years ago, when they decided that a better, more intensified, tourism promotion was needed, they introduced a new tax for tourists. This tax has recently increased by 1%. It is only that 1%, which goes to the VVV to do a better promotion job... In a way, they are saying, you should not completely rely on us. The money the VVV gets is so tiny and every year the amount they get is shrinking" [Amsterdam Interview: 5].*

> *"Some of our promotional campaigns used to be sponsored by the Municipality. Then, they cut the financial support and we had problems. They thought that business was going downhill. But the only way to recover from decreasing visitor numbers is to market it effectively. Their suggestion was that if we wanted the business to grow, we should get the financial backing from the market itself. That is why we now have higher membership fees" [Amsterdam Interview: 11].*

As mentioned above, the leading tourist authority of Amsterdam, the VVV, is a private organisation, which receives grants and loans from some public authorities. The quotations attached to the code *'public organisations'*, therefore, offer insight into the views and perceptions of the interviewees on the national and local authorities such as the NBTC *-i.e. NBT at the time of primary data collection-* and the City of Amsterdam. Criticism over the approach that the Government and the municipality have been pursuing toward tourism development and marketing, is already covered above. Other statements gathered under the code *'public organisations'* enfold varying other expressions regarding the role played by the public authorities in the tourism network and the expectations for improvement.

The most mentioned aspect with a reference in 5 out of 11 quotations was the acknowledgement of the importance of working in co-operation with the Government. This was often associated with the ability of the nation-wide tourism authorities to develop and market the sector in international markets and also with the indisputable status of Amsterdam as a gateway destination, which forces public authorities to include the city in most of their promotional campaigns. In fact, five interviewees stated that the Netherlands as a whole tourist product can only be marketed effectively by public sector organisations, while three statements were on the significance of Amsterdam for the development of international tourism in other parts of the country. The other quotations linked to the code were on the regeneration project initiated and supported by the Government along the IJ waterfront, the reliability of monitoring product and service quality in tourism establishments and the organisation of special events sponsored by public authorities. The reason why the number of topics exceeds the number of quotations is because some interviewees provided more than a single perspective on the subject.

The code *'private organisations'* was attached to a higher number of quotations than the one on public organisations. The 14 quotations of the code concentrate on three main areas. First, as in London, the private organisations were considered to be more professionally operated than public sector organisations, which, as a result, makes them more systematic and effective in policy-making and marketing. Secondly, as the producers and sellers of tourist products and services, private organisations were found to be in direct contact with visitors and to discern the changing characteristics and trends of both the demand and supply side. Finally and most importantly, the fact that the leading tourism authority (LTA) is a private organisation was not opposed, but supported by the interviewees. It was often stated that a private LTA represents the sector well and works effectively in order to meet the needs and expectations of sector stakeholders as well as visitors. Clearly, in Amsterdam, the existence of the private VVV highly depends on how much it meets these needs, as its main funding source is generated by private members. Examples of the quotations on these two codes are as follows:

> *"I think that a private VVV suits the Dutch tourism industry. If you look at the German tourism organisations, they are all public companies. They get their money from public sources. They do not need to take care of their income, because it is provided anyway. They do not need to worry whether they are working efficiently or not. They take things more than granted... When it comes to certain matters, you try to make things effective. Effectiveness of your activities becomes your priority" [Amsterdam Interview: 2].*

> *"We do co-operate with the VVV and the NBT. But there are things, which are clearly out of their league. For example, we are also working very closely with the Port Society, which is about to develop a new area with some more shops, hotels and restaurants along the IJ. It is a huge projection and a single private organisation could not possibly deliver it... When it comes to marketing our product, we work with the NBT and let them take our brochures to trade fairs... They work well. It could have been better" [Amsterdam Interview: 10].*

When the interviewees were specifically asked to comment on the effectiveness of the VVV as the leading tourism authority in Amsterdam, they did not seem to be as critical as they were with the City of Amsterdam and the Government. On the contrary, the code *'leading tourism authority'* indicates that the VVV was considered as a marketing agency, which seemed to put all its efforts into promoting Amsterdam providing its limited funding sources. Most of the interviewees confirmed that their organisation was a member of the VVV and they worked in close co-operation with the Board in terms of either attending their meetings and education programmes, or taking part in its promotional campaigns. More importantly, five interviewees representing different sub-industries referred to the marketing activities and research findings of the VVV visitor surveys specific to their field of profession. This suggests that the interviewees were aware of how the VVV functions, and also that the Board provides its members with regular and up to date information:

> *"We have a strong cultural product in Amsterdam. The VVV has recently started to concentrate on that aspect. They hope that the negative image would vanish sometime by selling museums, theatres and art galleries" [Amsterdam Interview: 15].*

> *"I know that VVV is trying to market the city as a conference centre. They now consider reaching the target segments directly. Their research showed them that there is a great potential in the conference market" [Amsterdam Interview: 13].*

> *"Recently, Amsterdam has been doing well. One of the reasons is because the VVV has started to work with the NBT in promoting the city. Before, it was the sole responsibility of the NBT. But now, the VVV can have a word and consult the office. They now understand that Amsterdam is a gateway to the country, and more emphasis should be put on the city" [Amsterdam Interview: 4].*

Nevertheless, there were also comments on the expected role of the VVV and the areas where it lagged behind the sector's expectations. The quotations attached to the code *'lack of confidence in LTAs'* combined those views and totalled less than half of the 13 quotations linked with the same code in the case of London. Three out of 6 statements were on the failure of the VVV in lobbying the sector's needs in the Government and the other concerned local authorities and to persuade key decision-makers to become more ambitious with systematic and consistent tourism development and planning. Two interviewees, meantime, disagreed with the way the organisation was coping with the transformation of Amsterdam's negative image into a positive one. Finally, one interviewee stated that the VVV was a marketing-oriented organisation, which had no control over product development and improvement. Some of these quotations are as follows:

"The VVV needs to face up to the problems of the city and try to do something. They have been ignoring the facts and trying to create something new. As you would know, you cannot create images for destinations. You can only modify them. The first thing to do is to identify what the existing image a city has in the major market segments. There should be a lot of elements associated with Amsterdam in overseas markets" [Amsterdam Interview: 6].

"The VVV and the (City of Amsterdam) should be on the same track in terms of their goals and aims... How much do they co-operate with each other and how much are they against each other? How is the City of Amsterdam seeing tourism and its role in the whole economic system of the urban area and whether this is on the same level with the plans of the VVV or not. If not, maybe the VVV should try harder to get the (City of Amsterdam) on its side" [Amsterdam Interview: 1].

The statements on the organisational structure of the VVV and its role as a strategic leader of the sector were assembled under the codes *'need for more staff'*, *'need for funding'* and *'lack co-operation'* attached with 4, 9 and 6 quotations respectively. The first two of these codes are clearly interrelated, as financial restrictions on the VVV prevents it not only from executing broad range of operational tasks and marketing activities, but also from employing a number of professionals to deliver these duties. The lack of co-operation, meantime, refers to the need for an integrated tourism network across the city, where the stakeholders from all sub-industries are brought together with policy-makers. In other words, since most of the major tourism organisations are members of the VVV and take part in the organisation's policy-making procedure to a certain extent, a better collaboration is sought with public authorities in platforms initiated by the VVV. Three quotations from each of these codes are shown below:

"I am afraid to say that the (VVV) cannot work too effectively. First they do not have enough personnel... Second, they lack financial back up, which should be provided to that sort of an organisation" [Amsterdam Interview: 7].

"I am aware of the efforts to promote Amsterdam as a shopping destination. The municipality is involved in some joint works with specialised shops and small sized organisations to develop some central areas for shopping tourism. The VVV does not participate in this project. They do something different with the shops in the Museum Quarter" [Amsterdam Interview: 8].

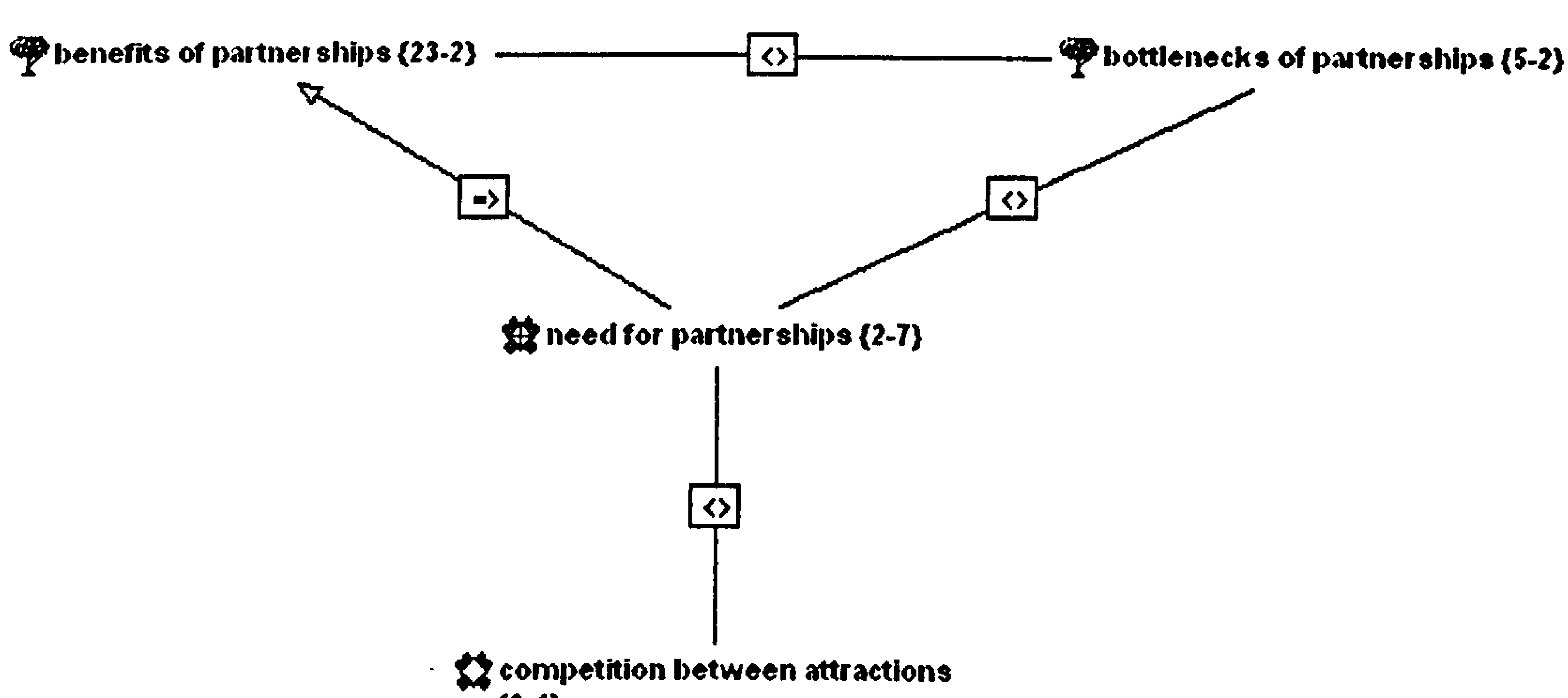
"I cannot believe that there is a tourism board somewhere in the world, which does not have any financial problems. They all have problems and they all fight to get more public money" [Amsterdam Interview: 9].

The last code in Figure 7.3 is *'community acceptance of tourism'* and was discussed in Section 6.4. To remind, the Amsterdam interviewees mostly agreed that there is no severe rejection of or resentment towards tourism among the local residents, who are famous for their friendliness and tolerance. The only qualm of the inhabitants regarding the sector was said to be the local authorities' constant attempt to organise special events, which lead to crowding and pollution in the city centre. Two interviewees also stated that unless the responsible authorities take necessary precautions and overcome the negative image problem of Amsterdam as a *'sex and drugs'* destination, the misconception of the city's product offer may result in unwanted visitors and, consequently, the resentment of local people towards tourism.

The second network created to understand how the interviewees from Amsterdam perceived collaboration among sector stakeholders is shown in Figure 7.4. The centre code called *'need for partnerships'* includes two general comments on the importance of an integrated approach and suggests that there is a good level of co-operation in the sector, especially among private sector organisations. The need, once again, was associated with the key players of the public sector to become more proactive in creating a one-voice approach and to support tourism businesses with coherent and consistent tourism development plans:

> *"There is a need for more co-operation in the tourism industry. But that is not a problem for the business tourism and the organisations working in our field, for example. We do have close contact with all the leading organisations. We organise meetings with them. But similar meetings could be arranged for the whole industry" [Amsterdam Interview: 11].*

Figure 7.4. The Network of Partnerships in Amsterdam



The advantages listed for the establishment of partnerships were similar to those raised by the London interviewees. 22 quotations attached to the code *'benefits of partnerships'* embraced such remarks as working towards shared objectives; pooling resources to gain economies of scale both in tourism marketing and development; lobbying the Government on the needs of the sector; creating a one-voice approach in major market segments; organising education and training programmes for partners and; developing stronger communication networks within the sector to stimulate tourism awareness and to trace market trends. One interviewee also stated that partnerships enable partner organisations to conduct combined research investigating various aspects of the both demand and supply sides of the tourism sector. The high occurrence of the code was due partly to the number of interviewees representing various partnership establishments, and partly to the fact that the rest were members of various strategic alliances and trade associations. Examples of the quotations include the following:

> *"In Amsterdam, partnerships are getting more and more important. 5 and 4 star hotels have foundations... There is a diamond partnership for diamond companies. They do a lot of joint promotion among themselves... There is also a co-operation between the (VVV) and the provincial tourist offices. They try to combine the Amsterdam tourist product with the nearby provinces' offers. Some of these provinces even used to have their own stands in travel markets. But now, they consider that as a waste of money. They can better be represented together with Amsterdam" [Amsterdam Interview: 3].*

> *"(As a partnership), we work as an intermediary organisation between our members and the local government. We try to support our members' views on certain issues like the quality of the streets and entertainment, public transportation and the accessibility of the area. We go and see those people who are responsible for these matters. We also organise special events like an Italian week or a Portugal Week, where all the members get a chance to participate" [Amsterdam Interview: 10].*

The difficulties in establishing partnerships, on the other hand, were grouped under the code *'bottleneck of partnerships'*. Three out of five quotations regarded the hesitation of some organisations to work with small-sized establishments. The interviewees representing well-established companies argued that it is more sufficient for them to act independently and to produce their own marketing campaigns, as they are often expected to provide larger shares of funding in joint works than other members. They also added that all partners achieve equal benefits in return of serving shared objectives, so each should be contributing likewise. The fragmentation of the sector and various partnership organisations were also said to confuse tourism organisations, which find it difficult to decide which partnership organisation to be a part of. Finally, high membership fees were considered as a discouraging factor in bringing stakeholders together by another interviewee:

"If a museum, for example, wants to participate in an international fair with (the VVV), they have to pay a certain amount of fee. (The VVV) makes the overall arrangements, the museum pays its share. Everything like transportation, brochures and leaflets and hotel reservations, is organised for them. But not all attractions can afford these expenses" [Amsterdam Interview: 2].

"In Amsterdam, we have several associations and foundations. They all aim to promote the city. There is an organisation to promote Amsterdam as a sports city, as a business centre and as a cultural city. There is a need to establish a platform... I think that is what is needed in a big city like Amsterdam" [Amsterdam Interview: 4].

The last code in Figure 7.4 is *'competition between attractions'*, which is attached to two quotations. As the small number of recurrence of the code indicates the interviewees were not concerned about the degree of competition between sector stakeholders, which could, at its extreme, harm the well-being of the sector and prevent stakeholders from working in co-operation. Yet, one interviewee explained that the confidentiality of business records and visitor statistics of individual organisations sometimes restrict the establishment of an overall framework demonstrating the current standing of the sector.

To conclude, the interview findings from Amsterdam suggest that despite the recent transformation of the Netherlands Board of Tourism and Conventions (NBTC) and the consecutive marketing plans produced by the Amsterdam Tourist Board (VVV), it is the Government, whose support, both financially and strategically, is considered imperative to complete the tourism network. As frequently mentioned by the interviewees, public authorities, which have been concentrating more on recreation that tourism, are the only missing elements for the improvement of an already established collaborative approach among the private sector organisations. Although there were a few remarks concerning the intentional neglect of tourism as a de-marketing tool by the Government, it is important to note that, at the time of interview conduction, the interviewees were unaware of the recent transformation of the national tourism boards as well as the tourism agenda introduced by the Ministry of Economic Affairs (MvEZ). The MvEZ now puts greater emphasis on the encouragement of sector-wide co-operation, while the VVV focuses on the quality of products and services, the uniqueness of the product package and sustainable tourism growth.

7.2.3. Istanbul: Centralised Tourism Planning and Marketing

As discussed in Section 6.2.2, Turkey has become a salient tourist destination appealing mainly to the Western European holidaymakers since the early 1980s. However, as Goymen (2000) cites, the country showed interest in tourism and its economic benefits as early as the 1950s. The government-operated Tourism Bank was established in 1955 in order to provide incentives and loans to tourism investors; to establish and manage *'prototype'* organisations mostly in the form of hotel operations and; to provide technical and project support to private entrepreneurs. However, it was only after the 1980s when the allocation of public land for tourism developments was simplified and bureaucratic obstacles were diminished, that tourism development was triggered. As the author further notes, at the time of the Bank's merging with the State Investment and Workers' Investment Bank to form the Turkish Development Bank in 1988, the loans provided to private sector and foreign investors totalled $450 million with the country's total bed capacity reaching 146,700 beds.

Another indicator of the country's interest in developing tourism was the establishment of the Ministry of Tourism in 1963. The initial objectives of the Ministry were to stimulate tourism activity and its contribution to the gross national product; to create new job opportunities; and to provide more holiday opportunities for Turkish citizens (Goymen, 2000). The Ministry was appointed to encourage partnerships among public and private sector organisations in order to deliver these objectives. While the facilitation of physical and social infrastructure *-i.e. transportation, communication, tourism education-* was expected of the Government, the contribution of the private sector was anticipated in the field of supra-structure development. The overall aim was to introduce the country to mass tourism with newly developed coastal resorts. Nevertheless, in the 1960s and the 70s, the target of the physical establishment of tourism had not been met. While the private sector hesitated to operate in an unstable economic environment, the Government failed to accomplish its own goal to improve infrastructure facilities.

In 1982, the Tourism Encouragement Law was approved in the parliament and soon enticed investors to benefit from the low-rent public land and the low-interest loans provided by the Government in areas identified as *'tourism development sites'*. The mass tourism was finally manifested as a belated achievement of the 5 Year Development Plans, which have been prepared since the 1960s on a nation-wide scale covering long-term development policies and strategies for all economic sectors existing in the country. These plans, which are considered as mid-term strategies of a long-term sustainable growth, have consistently embraced objectives on tourism development with the aim of generating tourism income and employment opportunities to eliminate economic pressures of a developing country (Dincer and Dincer, 1999).

The most recent 5 Year Development Plan covering the period 2001-2005, was prepared by the former government in 2000 as a component of a long-term plan extending to the year 2023. In addition to a separate section on tourism and promotion, the plan includes development strategies on some other tourism-related issues such as culture, recreation and transportation. Emphasising the importance of the tourism sector for the national economy and its speed growth over the last 20 years in spite of crisis periods, the plan determines the areas in need of attention so as to revise marketing and promotion activities; to prevent coastal resorts from becoming highly dependent on foreign tour operators and their pricing policies; to improve the accessibility of the country to major visitor generators; to upgrade product and service quality through education and training programmes and; to induce sustainable growth of tourism with minimal damages to physical and social environments (DPT, 2000).

Since the plan is prepared as an overall guide to national tourism development and marketing, there are no specific objectives concerning individual projects and destinations. Therefore, the tourist offers of neither Istanbul nor any other destination in the country is assessed individually in the plan. Yet, some of the strategies listed under the heading of *'tourism and promotion'*, are included in this section, as they offer insight into how the Government aims to market the country and which new approaches would be pursued within the plan period. These strategies are (DPT, 2000):

a) to regenerate areas through tourism, which have great potential to attract visitors and can facilitate the dispersion of tourism flow across the year and the country;
b) to encourage sector stakeholders and local people to participate in tourism planning in the destinations, where tourism is among the foremost economic sectors;
c) to monitor visitor trends and to upgrade tourist offers of the country accordingly;
d) to provide initiatives to develop new forms of tourism including spa, yacht, business and golf tourism, ski resorts and activity holidays;
e) to ensure the financial and strategic support of sector stakeholders in marketing activities, which have been so far conducted solely by public authorities;
f) to establish a national consultation forum, where the leading tourism organisations are brought together to assist in policy making procedure, which would, consequently, help to create a one-voice approach;
g) to benefit from the IT developments in the field of destination marketing and information dissemination;
h) to educate local people and tourism staff in order both to raise the awareness on the benefits of tourism and to improve the quality of tourist products and services.

While the 5 Year Development Plans have laid the grounds for tourism planning and marketing from a broad, but simplistic perspective, the preparation of comprehensive and elaborate plans have been the responsibility of the Ministry of Culture and Tourism (TCKTB). Throughout its existence over the last 40 years, the Ministry has continuously been restructured by the consecutive governments according to their political agenda. The transformation has not taken place in the sense of introducing major reforms to the tasks and organisation structure of the TCKTB, but of uniting or separating the Ministry of Tourism with/from the Ministry of Culture. The current government, once again, brought the ministries together in 2003, which had been apart since 1989 (TCTB, 1998; TCKTB, 2004).

Prior to the 1980s, the TCKTB's responsibilities included nation-wide tourism planning; licensing and standardisation of tourism facilities; supervision of existing attractions and establishments; determination of service charges for hotels and restaurants and; opening of training centres to meet increasing demand for qualified personnel. The marketing activities of the Ministry were limited and revolved around opening tourist information centres in the leading tourist destinations across the country and also launching tourism bureaux in the major visitor generating countries abroad (Goymen, 2000).

In the 1980s and 1990s, the TCKTB, as the sole authority involved in tourism planning and marketing, became more proactive in marketing activities, while tourism planning was based on ad hoc strategies altered according to the priorities of the consecutive governments. Although the coastal resorts retained their importance for the national tourism sector, the variety of culture and heritage offers accompanied the sea-sun-sand destinations in promotional publications. The number of tourism bureaux established in the international markets reached 24 branches in 21 countries by 1999. The Ministry prepared and distributed promotional publications, organised familiarisation trips for tour operators and journalists, attended major travel fairs and run marketing campaigns in various countries (Goymen, 2000).

Having earned a place for Turkey among the Mediterranean destinations, the planning and marketing efforts of the Ministry gradually shifted from the overemphasis on traditional holiday resorts to alternative tourism opportunities by the mid-1990s. The annual plan published by the TCKTB in 1998, for example, stressed the importance of product development and the introduction of new tourism forms including activity holidays *-i.e. skiing, trekking and rafting-*, congress tourism, ecotourism along the Black Sea and spa tourism. The diversification of demand was aimed to eliminate the risk of relying on a single market of traditional package tours. In addition to the strategies on product development, the plan consisted of four other sections on infrastructure development; marketing and promotion; tourism employment and training and; special projects. The strategies listed under marketing and promotion included marketing Turkey as a congress and convention destination; collaborative promotion with sector stakeholders in international markets and; co-operating with national and international intermediate organisations when marketing the country (TBYGM, 1998).

There is no doubt that the planning and marketing efforts of the TCKTB played an important role in the emergence and development of Turkey as a tourist destination over the last 20 years. However, it is often argued that the centralised tourism planning and marketing conducted by the Ministry on a nation-wide scale have not always been effective and fully expedient. To start with, there had been a lack of long-term tourism vision up until very recently. The radical legislative initiatives of the 1980s were not followed by similar attempts to secure sustainable growth through consistent and coherent strategic plans. The consecutive governments entrapped in severe economic crises until the very end of the 1990s, had either failed to show an interest in product development and destination marketing, or were simply unable to funnel adequate budget allocations into tourism. During such crises periods, the marketing activities of the TCKTB had become as limited as to reproduce and to distribute written promotional material covering major tourist regions of the country (Camas, 1992).

Secondly, as Tosun and Jenkins (1996) discuss, the responsible public authorities had not developed a regional planning approach to tourism development until very recently. The centralised tourism planning and marketing under the control of the TCKTB not only meant lack of co-operation among public and private sector players, but were also confined to the packaging of the whole country as a tourist destination. The needs and problems of the sector on a local scale were overlooked, while the improvement of tourism infra- and supra-structure was mistakenly considered as the sole component of tourism policy making. As the authors further add, the objectives and aims determined by the Ministry neglected the changing characteristics of both demand and supply sides in individual destinations, which, consequently, resulted in confusion over the definition of desired level of tourism development in dissimilar destination types. In contrast to seaside holiday resorts, which have been witnessing almost spontaneous growth of tourism initially induced by government incentives and loans, other destinations with a great potential of tourism development, such as urban and rural areas, national parks and heritage sites, required further public support both financially and strategically.

Most importantly, the criticism was raised regarding the public-led marketing activities and information dissemination administered by the unskilled personnel of the Ministry (Camas, 1992; Tosun and Jenkins, 1996). The lack of co-operation combined with bureaucratic obstacles in obtaining information and in participating the policy-making procedure often made private stakeholders feel left out of the implementation of strategies. As a result, they engaged in their own marketing campaigns. This situation hampered the creation of a one-voice approach, where the mediocre efforts of the TCKTB conflicted with the commercial interests of tourism businesses. The image of the country was, at times, hinged upon the marketing activities of international tour operators trying to sell package holidays, while the lack of a provident and effective national authority dealing with bad publicity in visitor generating markets, caused fluctuations in arrivals.

The current government has recently prepared a long-term plan for tourism development extending to the year 2023 and addressing some of the above mentioned problems. The initial phase of the plan, which is entitled *'The 2010 Tourism Vision of Turkey'*, is split into two mid-term implementation periods between 2004-2006 and 2007-2010. The Ministry of Culture and Tourism (TCKTB) is made responsible for the delivery of the action points and strategies determined by the plan, which redefines the Ministry's main objectives as (TCKTB, 2004):

a) to develop, improve and safeguard the cultural and heritage tourist products of Turkey;
b) to foster the economic means of the sector through increasing visitor arrivals and tourism income and to benefit from tourism as a catalyst in national economic development;
c) to identify and develop new potential tourist products across the country;
d) to invest in tourism infra- and supra-structure where necessary and;
e) to promote Turkey as a tourist destination using all effective marketing tools and promotion techniques.

The nine ministerial directorates reporting to the Minister are responsible for the monitoring and administration of these objectives (*see Appendix 27*). Each chaired by a General Director, these directorates include the Directorates of Fine Arts; Cultural Heritage and Museums; Libraries and Publications; Copyrights and Film Productions; Promotion; Investment and Establishments; Research and Education; National Library and; International Affairs. The ministry also embraces five consultancy and inspection departments and four subsidiary service departments. Among these, the Departments of Research, Planning and Co-ordination and, Public Relations and Media play important roles in tourism development and marketing (TCKTB, 2004).

According to the new plan, the overall long-term aim is to transform the existing supply-oriented policy making and marketing of the concerned authorities into the identification of new measures and means for sustainable growth through co-operation. To this end, the product development and improvement will be the foremost concern of the TCKTB, which is expected to promote the diversity of cultural activities and heritage attractions spread across the country. For the initial 3-year implementation period between 2004-2006, the action points are as follows (TCKTB, 2004):

- to enhance the competitiveness of Turkey in the international tourism markets through sustainable growth;

- to increase the total number of international staying visitors to 20 million and the total amount of tourism income to US$ 18 billion by the year 2006;
- to create 500,000 new employment opportunities in the tourism sector through investing in product development and improvement by the year 2006;
- to develop a new tourist brand for Turkey emphasising the themes *'culture'* and *'heritage'* and to get the message that the country has more to offer than only traditional holiday packages, across as widely as possible;
- to allocate larger budget allocations to the management and maintenance of public museums, historic buildings and heritage sites;
- to initiate the sponsorship of historic buildings by the leading 500 business companies;
- to encourage the leading private sector stakeholders to take part in corporate marketing activities and to provide financial backing to promotional campaigns;
- to improve accessibility and to extend the network of motorways and dual-carriageways across the country;
- to support the development of private aviation companies and the expansion of their domestic and international flight networks and;
- to raise the quality of tourist products and services.

As the above mentioned actions indicate, the Government and the TCKTB have taken the first steps to the preparation of long-term vision implemented through mid-term action plans, and also have assured that the Ministry would be seeking the co-operation of the private sector in monitoring, financing and implementing these strategies. Moreover, the TCKTB has, for the first time, decided to involve in destination-based tourism development and marketing rather than concentrating its efforts on a nation-wide scale. So-called regional planning and marketing has been introduced by the selection of Istanbul as the pilot destination. In the plan, it is argued that Istanbul lags far behind its potential to attract visitors and deserves a better place among the leading international city destinations (TCKTB, 2004).

In order to enhance the competitiveness of Istanbul, the plan proposes several projects to be undertaken in the city. The Historic Peninsula Project, for example, aims to transform the area, where the leading heritage attractions like the Topkapi Palace and the Blue Mosque are, into a museum quarter through improving pedestrianisation and street decoration; restoring and renovating the neglected historic buildings; raising the awareness of tourism among local residents; developing new recreation areas and; increasing the quality of tourist products and services offered by private tourism establishments. While the TCKTB is the primary funding source, the Greater Istanbul Municipality, private stakeholders, various foundations and associations sponsor the project, which will also attempt to link Halic and Beyoglu, the other major tourist zones, to the Peninsula as the interconnected *'historic and cultural'* offers of

Istanbul. The other projects of the Ministry include a new congress and culture centre; a new exhibition hall; the extension of the underground network; the improvement of the Galata Bay Port and its facilities for cruise ships and; the transformation of some derelict historic buildings into museums (TCKTB, 2004).

Although the outcomes of these plans are yet to be seen, it is important to note that the success of the Istanbul projects depends on how the city as a tourist destination is marketed, which, according to the new tourism vision, is still under the control of the TCKTB. Although the fragmentation of the sector causes overlaps in efforts in many destinations, the highly centralised tourism planning in the case of Turkey has its own drawbacks. No matter how successful and effective the Ministry's marketing activities in the major visitor generators are, unless they are supported with effective on-site management and marketing by local authorities, which should be equipped with skilled personnel and adequate financial resources, there is always a risk of failure in accomplishing the set goals. Overall, the obstacles for Istanbul to fulfil its potential as a tourist destination remain as the bureaucratic restrictions preventing sector stakeholders from participating in the decision-making procedure and the centralised planning leaving local authorities with trivial roles and responsibilities in creating a one-voice approach and implementing policy strategies on a local level.

7.2.3.1. Governor's Office and Istanbul Tourism Directorate

In Turkey, public administration is established according to a top-down authoritative system, where urban areas represent administrative units (Tosun and Jenkins, 1996). For each city, the government appoints a governor, who is responsible for a wide range of public services such as security, education, agriculture and health, within the boundaries of a greater urban area. Those cities, where tourism is among the leading economic sectors, a Directorate of Tourism is established under the jurisdiction of the Governor and complies with the strategies and policies of the TCKTB on a local-level. The tasks and objectives of tourism directorates are set by law and include (ITD, 1998):

a) to prepare an annual tourism inventory covering the demand and supply aspects of the tourism sector in the concerned city;
b) to provide the Ministry with adequate and complete information on the tourism sector, which is required for tourism policy making;
c) to inform the Ministry about the achievements of the city in accordance to the objectives of the previous 5 Year Development Plans;
d) to co-operate with the sector stakeholders ranging from local residents to trade associations in order to assure the compatibility and well-being of the sector in the city;
e) to take necessary precautions to mitigate tourism-caused pollution and crowding;
f) to organise special festivals and events to foster tourism flow within the city;

g) to ensure the security of visitors throughout their staying in the city;
h) to raise tourism awareness among local residents, public authorities and private organisations;
i) to encourage partnerships among the sector stakeholders in order to boost both civic pride and sustainable tourism growth;
j) to inspect quality standards of the tourism establishments registered by the TCKTB and;
k) to co-operate with the Ministry in preparing and disseminating the written promotional material.

The law, which anonymously sets objectives for all tourism directorates in the country regardless of destination-specific issues, also determines their organisational structure. The Istanbul Tourism Directorate (ITD), therefore, consists of four departments under the management of a Tourism Director: Departments of Tourism Management; Promotion; Administration and; Accounting. In addition, the ITD manages the tourism information centres in the city.

As the above listed objectives suggest, the ITD operates as a local branch of the Ministry in Istanbul. The centralised policy making leaves the ITD with a relatively minor role, which, in most cases, does not enfold more than the preparation of annual tourism inventories, the inspection of service qualities in tourism establishments and the distribution of the promotional leaflets and brochures designed and published by the TCKTB. One of the main reasons for this is that pursuing policy actions require continuous and mass financial sources. Although the Governor's Office is provided with annual budget allocations by the government, the problem arises regarding the fair distribution of these public sources between various urban dilemmas. In Istanbul, where transportation, housing, infrastructure, health and education still remain as major urban dilemmas, the public funds for tourism development and marketing are eminently finite. In fact, a research report by the Governor's Office notes that the share of the accommodation sector in public investment decreased from 2.45% in 1995 to 0.17% in 1998, while the only sectors with increased shares were education and health (TCIV, 2000).

Although the same report discusses that tourism is among the economic sectors, which could help alleviate urban problems of Istanbul providing that its growth is supported through public-private sector co-operation and further investment in product development, it seems unlikely that the ITD could accomplish its expected role to become a strategic leader of the tourism sector and to bring the concerned authorities together to achieve corporate goals, given its inflexible organisation structure and limited responsibilities. In addition to the fact that the Directorate has not prepared strategic plans for tourism in Istanbul, bureaucracy and unskilled personnel comprising civil servants, conflict with the essential prerequisites of a powerful and effective tourism authority. Although the Governor's Office provides indirect support for the sector through certain public services such as road-building and security maintenance, any progress on tourism development and management has so far been based on ad hoc schemes and initiatives, where long-term objectives and strategies are absent.

7.2.3.2. Greater Istanbul Municipality

As well as government appointed governors, each city has a municipality and an elected mayor in Turkey. Mayors are elected for a period of five years and are responsible for public services including sewage, water supply, the maintenance of recreation sites and parks, inner-city transportation, planning regulations and hygiene inspections. Although the responsibility of destination-wide tourism planning and marketing ostensibly reside in governors and their respective directorates of tourism, municipalities may become more competent, especially in product development and management, since their agenda does not necessarily need the approval of central governments. In any case, there is an overlap in responsibilities of these two authorities, which, in an ideal environment, should co-operate consistently and coherently in preparing and activating urban strategies and policies.

Over the last decade, the Greater Istanbul Municipality (IBB) has been involved in urban planning, where tourism and culture are tackled along with other urban issues such as infrastructure and public transportation. Tourism-related projects and strategies of the annual municipal plans are prepared by three departments: the Directorate of Safekeeping Heritage Sites and Buildings *-Tarihi Cevreyi Koruma Mudurlugu-*, the Directorate of Leisure and Tourism Establishments *-Sosyal Turistik Tesisler Mudurlugu-* and the Department of Cultural and Social Activities *-Kulturel ve Sosyal Isler Daire Baskanligi-*. The first of these departments was established in 1997 and aims to propose and effectuate urban planning regulations and projects, where historic buildings and sites are preserved, renovated and transformed into auspicious attractions or establishments in the forms of museums, hotels or restaurants. The Directorate also undertakes research to unearth and develop the neglected inheritances of the city (IBB, 2003).

The Directorate of Leisure and Tourism Establishments, meantime, aims to stimulate the participation of local residents and domestic visitors in tourism and leisure activities. To this end, the Directorate invests in tourism and leisure establishments and operates them at affordable prices. Some examples of municipality-run establishments are the holiday complex providing a *'sea-sun-sand'* package in the district of Florya, and various guesthouses and restaurants across the city accommodating and catering for domestic visitors. Finally, the Department of Cultural and Social Activities represents the theatres, libraries, a symphonic orchestra and museums operated by the IBB. Among the six museums under the management of the Department, there are the Museum of Fire Brigades, the City Museum, the Ataturk Museum and, the Museum of Caricature and Comics (IBB, 2003).

In addition to these departments, the IBB has established the Kultur Inc. in 1989 as a semi-public organisation funded by the municipality and its commercial activities. The organisation manages two visitor attractions -*i.e. the Miniaturk (Miniature Turkey Park) and the Basilica Cisterns*-, a concert and exhibition hall, two culture centres and film studios, which is let to private television channels. The organisational objectives of the Kultur Inc. are to trace recent developments in the sectors of culture, arts and tourism and to upgrade the offers of Istanbul accordingly; to introduce creative and innovative project proposals, which would raise the profile of Istanbul as a culture and arts centre and; to assist in promoting Istanbul as a world city through both corporate marketing activities with other stakeholders and marketing the Kultur Inc. attractions (IBB, 2002).

As the above examples denote, the IBB involves in tourism management and development both as a service supplier and as a local authority, which plans, regulates and develops collateral urban services and facilities ranging from transportation to housing. Nevertheless, the engagement of the IBB in tourism planning and marketing has so far been on a project-based and has lacked long-term goals and strategies. In fact, prior to local elections, mayor candidates representing numerous political parties, disclose their agenda for a period of five year, where the emphasis is put on the targets their predecessors failed to accomplish and on how they would achieve success.

The problem with this is that if the consecutive mayors are selected from opposing parties, they often hesitate to further develop and invest in the successful projects of the previous management, as they would erroneously be considered as approving the opponent's approach in public administration and service provision. The situation becomes even more complicated when the district mayors and the mayor of the Greater Istanbul Municipality (IBB) have conflicting views and perceptions regarding urban planning and development. The confusion over the responsibilities of the fragmented local authorities and the lack of long-term mission leads to inconsistency in planning and to confusion over accountability of each player as an urban leader.

Having noted its shortfalls as a destination marketer and planner, the current tourism-related projects of the IBB include a sea aquarium, a congress and exhibition hall, several culture centres across the city and an art gallery. The construction of the aquarium project has already started and is planned for completion in 2007 as a multi-complex attraction with live-show pools for dolphins, interactive sections allocated to different sea animals, a museum, a cinema, restaurants, a souvenir shop, a playground for children and exhibition and conference halls. Since one of the major disadvantages of Istanbul as a business destination is the lack of a large exhibition and conference centre, the IBB has also provided funds for the construction of a new centre embracing a theatre and an exhibition hall with participant capacities of 1,250 and 3,200 respectively. The project, which also includes small to medium sized conference rooms, a cinema, catering areas and parking space, was completed in 2004 (IBB, 2003; TCKTB, 2004).

7.2.3.3. Istanbul Convention and Visitors Bureau

The Istanbul Convention and Visitors Bureau (ICVB) was established as a non-profit partnership in 1997 and is supported partly by its public sector founders including the IBB, the Istanbul Chamber of Commerce and the Tourism Development and Education Foundation (TUGEV). The other funding source of the Bureau is membership fees generated through the membership of Istanbul-based five- and four-star hotels, convention and exhibition halls, private destination management organisations, travel agents specialised in congress tourism and the Turkish Airlines. The overall aim of the ICVB is to promote Istanbul as a congress and convention destination in international markets; to invigorate further product development and quality service provision in congress tourism and; to establish an integrated approach among sector holders to attract major international and national conferences, meetings and exhibitions to the city (ICVB, 1999).

The Bureau provides assistance to event and conference organisers regarding any desired information on the capabilities of Istanbul as a congress venue including social and technical information; promotional assistance; educational trip arrangements; program suggestions; in-advance accommodation and transportation booking services and; presenting its member organisations' products and services. The ICVB publishes and distributes numerous promotional material including the Istanbul Meeting Planners Guide, organises regular consultation meetings with its members, represents the sector to public authorities and the Government, initiates joined marketing campaigns and prepares news releases in addition to the publication of the 3-monthly magazine called Istanbul Bulletin (ICVB, 1998).

Based upon the expectations and needs of its members, the ICVB has determined its marketing and promotion strategies, which will be mainly directed at the North American and European markets, as (ICVB, 1998):

- to create a data bank embracing the contact details of major international organisations and a calendar of conferences, exhibitions and congresses traditionally held every year or are expected to be organised as a one-off event in forthcoming years;
- to engage in promotional activities to inform the contact personnel of these organisations on Istanbul as a tourist destination in general and its conference venues in particular;

- to attend tourism trade fairs abroad and in the country;
- to attract incentive groups to Istanbul;
- to arrange familiarisation trips for journalists and decision-makers of conference and convention organisations and;
- to provide the existing conference delegates and visitors with adequate and effective information to raise awareness and benefit from word-of-mouth in future references.

The establishment of the ICVB was initially urged by its private sector members and the chairman of the TUGEV in order to fill in a gap of a leading authority bringing together sector stakeholders and directing corporate activities for sound and effective tourism management and marketing of Istanbul in the field of congress tourism. The Bureau, which is chaired by a Managing Director, is currently run by a total of four personnel including a sales manager, a sales representative, an executive secretary and an office clerk. Although there is no doubt that the Bureau has accomplished significant tasks since its launch in 1997 and has raised an awareness of the integrated approach for destination marketing, it lacks the support of public authorities and requires consistent public funds, loans and grants to extend its marketing activities and to create a team of experts and skilled personnel (Kerimoglu, 2002).

7.2.3.4. Partnerships, Associations and Other Key Players as Marketers of Istanbul

Same as London, Istanbul is bidding to host the Olympic Games. The Istanbul Olympic Bidding Committee (IOBC) was established according to the Turkish Olympic Law passed by the Parliament in 1992. The missions of the IOBC are to bid for the Games; to carry out the construction of sports halls and stadiums as well as to initiate the development of other necessary facilities required to host the Games and; to organise the Games following Istanbul's election as the host city. Unlike the bidding committees of other candidate cities, the IOBC is not set up for a single candidature phase, but will exist until the event is brought to Istanbul. To this end, the IOBC has been applying to host the Olympics since its establishment, but has so far lost the consecutive Games to its competitors (IOBC, 1997, 2000 and 2003).

As a public organisation, the IOBC is financially secured by annual budget shares both from the Government and the IBB. Besides, the Committee receives a fixed percentage of revenues from football betting, the National Lottery and horse racing ticket sales. Having such sufficient and consistent financial sources, the IOBC has invested in various projects to strengthen Istanbul's candidature. Between 1992-2000, the Committee spent a total of US$ 139 million for the construction of sports complexes including the Olympic Stadium, which now hosts major sports events taking place in the city. In addition to its responsibilities for constructing, modernising and maintaining such complexes, the IOBC has also played an important role in bringing various local authorities and key businesses together to co-operate during bidding procedures and in advancing Istanbul's credibility as a tourist destination through conducting various marketing activities ranging from public relations to promotional publications on why Istanbul deserves to host the Games (IOBC, 2003).

There are also various trade associations, most of which the headquarters are based in Istanbul. The Union of Turkish Travel Agents (TURSAB) established in 1972, is arguably the most significant one regarding the main focus of this research, as the organisation strives for the effective and sustainable management and marketing of individual destinations as well as the whole country as tourist product packages. Since any travel agency requires an operation licence granted by the TCKTB and is obliged to become a member of the TURSAB in order to operate in Turkey, the organisation has a distinctive standing and represents the whole distribution industry with the only exception of international tour operators offering package tours to the country. The major tasks of the Union are to set the rules of commissioning and decommissioning travel agencies; to introduce and maintain professional ethics; to protect the tourist; and to co-operate with the TCKTB in marketing Turkey (Goymen, 2000).

The TURSAB also engages in the conduction of market research on visitors to Turkey; the organisation of regular meetings and workshops for its members to improve their businesses and; training courses for tourism personnel to raise quality standards in member organisations. More importantly, the Union has been lobbying the interests, expectations and needs of the tourism sector to governments and has been producing proposals and reports to raise an awareness on the importance of all aspects of tourism development including the quality of tourist products and services; the improvement of tourism infra- and supra-structure; sustainable tourism growth; the need for a long-term vision; consistent destination marketing and; the involvement of the local communities and businesses in tourism policy making procedures (TURSAB, 2003). In fact, it can be argued that the TURSAB, as a representative of the private tourism sector, has put much more effort into the formulation of tourism development and marketing plans than any Turkish government, but lacked statutory rights to implement its proposed strategies on both national and local scales. The Union now co-operates with the current Government in formulating regional and local tourism plans, which are initialised with the case of Istanbul.

Another association is the Istanbul Foundation for Culture and Arts (IKSV). Founded in 1973, the IKSV organises annual international festivals in the fields of cinema, theatre, music, jazz and contemporary arts. The festivals start in April with the International Istanbul Film Festival and continue throughout summer ending in July with the only biannual festival of the foundation in contemporary arts. While one of the most distinguishing aspects of these festivals is the use of historical venues for performances, the IKSV runs marketing activities highlighting both the festivals and Istanbul as a cultural centre. The foundation also co-operates with the TCKTB, the local authorities and sector stakeholders for both the successful organisation of its events and the extensive marketing of Istanbul abroad (IKSV, 2003).

Other associations established to represent sub-industries on a national scale include the Turkish Hotel Association (TUROB), the Turkish Tourism Investors' Association (TYD), the Tourism Development and Education Foundation (TUGEV) and the Promotion Foundation of Turkey (TUTAV). Set up in 1995, the TUROB aims to introduce standards and professional ethics and to facilitate price stability of hotel establishments; to contribute to regional development (through branches); to provide general and on-the-job training; to indulge in area promotion and marketing, and to co-operate with national and international tourism organisations. The TYD was established in 1988 to bring together companies and individual investors; to establish a network of shared information and collaborate activities; to provide technical assistance to members and; to act as a lobby group to the Government on behalf of the tourism sector (Goymen, 2000).

The TUGEV has been engaged in research activities related to tourism education; has established tourism training centres across the country and; has co-operated with the TCKTB to promote Turkey since its launch in 1985 (Goymen, 2000). The TUTAV, meantime, is the only association, which, by mission, contributes to international marketing of Turkey as an industrial, commercial, cultural and historic country through conducting promotional activities. Among such activities, the organisation of a *'Turkish Festival'*, a *'Turkish Week'*, concert performances by Turkish artists, fashion shows and Turkish cuisine shows held in various countries ranging from Japan to the USA can be listed (TUTAV, 2003). Although the marketing activities of all these associations and foundations concentrate on the development and improvement of the tourism sector on a national scale, Istanbul is often paid foremost attention as the cultural and arts capital and the gateway destination to Turkey.

To summarise, all of the above-mentioned organisations have been operating in an environment where the involvement of the Government in tourism development and marketing has diminished gradually following the generous loans and grants provided in the 1980s. Although the efforts of trade associations and foundations in tourism development and marketing are indisputable, the integrated approach, where the public and private sectors pull their resources to achieve shared objectives, remains to be fully accomplished in Turkey. The reasons for neglect are numerous, but highly depend on the unstable economic and political conditions of a developing country, which have forced national and local authorities to give priority to the areas during the allocation of finite public funds, such as education and health, where public investment was most needed.

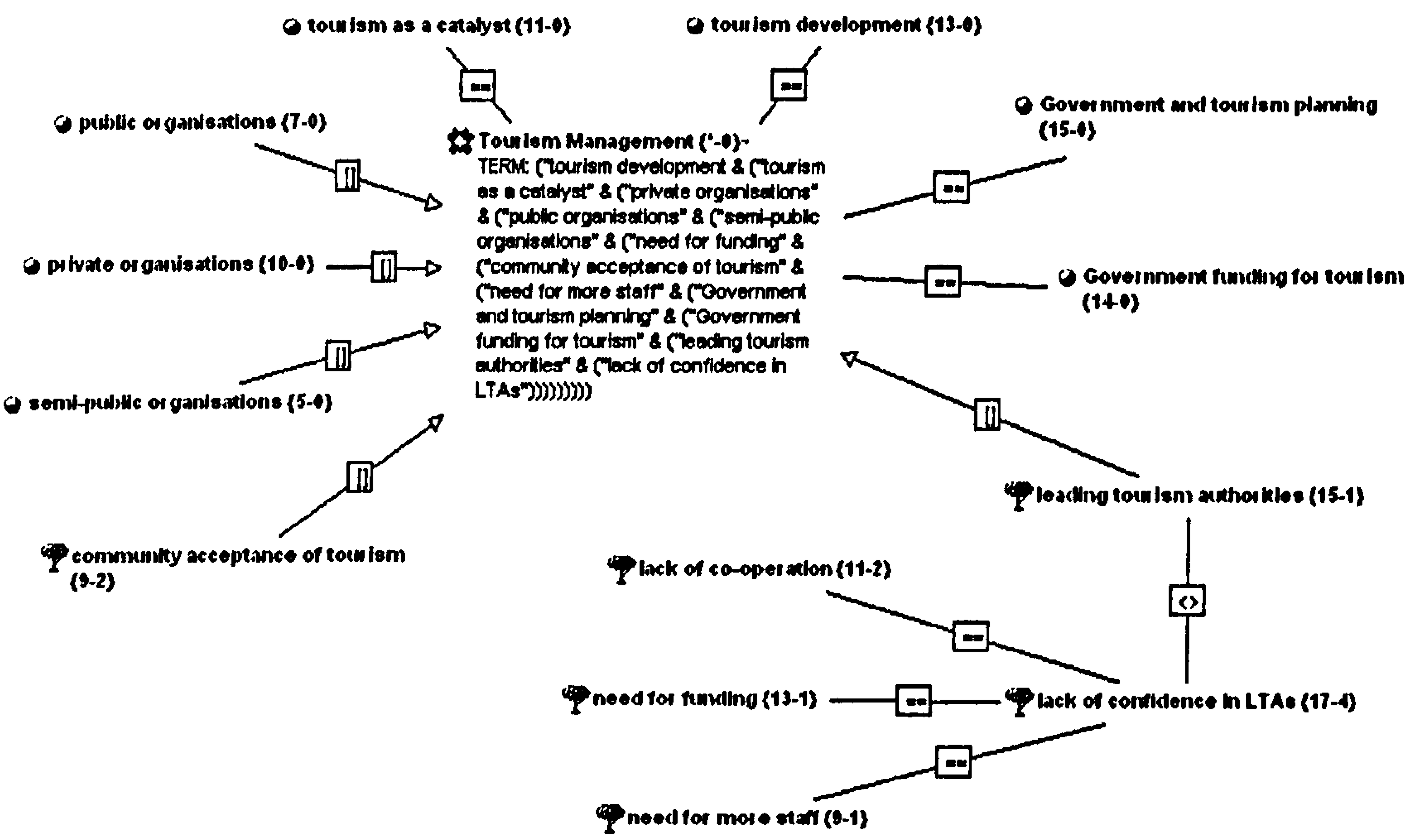
Recently, Turkey has entered a new era with a single-political party in government ending the coalition ruling since the late 1980s. The decreasing inflation rate and the recovering national currency against its foreign counterparts over the last couple of years have been considered as promising indicators of a sufficient economic development in the coming years. There is no doubt that tourism could play an important role to further stimulate economic growth with increasing visitor arrivals and spending. While Turkey is the only country among the case studies of this research, where tourism is represented at a ministerial level in the parliament, there seems to be an urgent need to diffuse the responsibilities and tasks of the Ministry onto regional and local tourism authorities in order to fully benefit from the sector's economic means. Under the strong influence of the centralised tourism planning, tourism directorates are neither capable of becoming strategic leaders of the sector with their existing structures and objectives, nor adequately equipped to monitor sector trends on both demand and supply sides to formulate effective and coherent tourism development and marketing plans.

7.2.3.5. Interview Findings on the Tourism Management Network in Istanbul

The first network created during the analysis of the interview findings from Istanbul is entitled *'tourism management in Istanbul'* and contains the same codes attached to the tourism management network of London with the exception of the code *'overlap in responsibilities'* being absent in Istanbul. As Figure 7.5 demonstrates, the network includes two codes representing the general views on the importance of tourism as an economic sector and the development of the sector as a catalyst in regeneration schemes -i.e. *'tourism development'* and *'tourism as a catalyst'*-; two codes on the Government involvement in tourism planning and funding -i.e. *'Government and tourism planning'* and *'Government funding for tourism'*-; the codes titled *'private organisations'*, *'public organisations'* and *'semi-public organisations'*; the code *'leading tourism authorities'* and another four indicating the weaknesses of these authorities -i.e. *'lack of confidence in LTAs'*, *'need for more staff'*, *'need for funding'* and *'lack of co-operation'*- and; the one on how local people perceive tourism development -i.e. *'community acceptance of tourism'*-.

When the Istanbul interviewees were asked to comment on the well-being of the tourism sector and its development process over the years as well as its current standing among other economic sectors existing in the city, they were more critical than the interviewees from Amsterdam and London. Out of 13 quotations attached to the code *'tourism development'*, only the one expressed by the representative of the Istanbul Tourism Directorate regarded the satisfactory progression of tourism with necessary measures taken by the concerned authorities to ensure its further growth. The rest of the interviewees shared a uniform view that the city deserved a better place in the international tourism map given its historic and cultural attractions than it currently bestows and that the incompetent tourism development and marketing activities pursued by public authorities has resulted in missed opportunities.

Figure 7.5. Tourism Management Network in Istanbul



Two interviewees mentioned that the recognition of tourism as an income generating sector has been on the rise. Another interviewee argued that tourism development has been taken granted and based on ad hoc schemes, while the meritorious efforts of private sector partnerships to improve sub-industries were not enough to establish a solid ground for integrated and city-wide tourism development. In fact, the lack of long-term planning was mentioned by another five interviewees, who revealed the prerequisites of a sustainable tourism growth as systematic and consistent tourism plans. Although seven out of 17 interviewees added that their organisations prepare strategic development and marketing plans, the need to consider urban tourism planning within the concept of *'a product package offer'* seems to require further attention by local authorities in Istanbul. Some of these quotations are as follows:

> *"Given its unique geographical spot in between Asia and Europe, Istanbul could easily become an international financial, cultural and entertainment centre. It could be a world city along with Paris, New York or Tokyo. Nevertheless, we do not appreciate what we have and what we can achieve through developing tourism and attracting more visitors. You cannot get anywhere thinking why there is a need to renovate and promote the Topkapi Palace and to improve its visitor facilities and services, since it already appeals to tourists in its present state" [Istanbul Interview: 17].*

> *"Tourism is a dynamic sector, where the needs and wants of visitors change rapidly. That is why the plans prepared in the 1970s do not necessarily fit into the characteristics of the sector today. Besides there is not much done after the 1980s in the country, where the primary focus is still on holiday resorts... In Istanbul, there is this trend to build attractions, to publish promotional material and to make all necessary arrangements for major international events; like the Habitat Conference, in order to get the city ready in time. After the event is over, there is no follow-up in development until another forthcoming event is announced" [Istanbul Interview: 12].*

> *"There seems to be an increasing interest in tourism among (the local authorities), who are eager to flourish the economic benefits of the sector. However, tourism development, on its own, would not help them to achieve targets unless it is integrated into an overall urban plan, where wide issues ranging from public transportation to rubbish collection are dealt with harmoniously" [Istanbul Interview: 13].*

Although there are no specific tourism-based regeneration schemes carried out in the city, the number of quotations attached to the code *'tourism as a catalyst'* was higher in Istanbul -i.e. *11 quotations-* than in the other case studies. Unlike the initiatives introduced in London to regenerate outer districts through tourism, the economic benefits of the sector were argued to facilitate urban development of Istanbul as a whole. The high recurrence of the sector's catalyst role should, therefore, be associated with the fact that Istanbul is the biggest metropolitan area of a developing country, where urban dilemmas still remain unsolved. In fact, nine interviewees mentioned the multiplier economic benefits of tourism and the potential of tourism income to upgrade the whole urban network. While one quotation attached to the code was regarding the need to attract high-spending market segments in order to maximise tourism revenues, two interviewees added that it is the long-term benefits of tourism development in the fields of social and physical improvement, which are often overlooked by the local authorities, who turn into short-term resolutions to trigger economic development:

> *"I believe that local residents and tourism entrepreneurs are aware of the benefits of tourism for both Istanbul and their own businesses... This is our business. If it gets damaged, we would be the first ones to feel the pressure. But the sector will not be the only one suffering from the loss of tourism income... The Government refers to economic crises and constantly introduces new fiscal policies and strategies to overcome the problems. Tourism could help alleviate such problems and trigger economic development. Nevertheless, it is often neglected" [Istanbul Interview: 4].*

The remarks of the Istanbul interviewees on the Government's involvement in tourism is particularly distinctive, since national and local tourism planning and marketing are solely executed by the Ministry of Culture and Tourism (TCKTB). Although some of the quotations attached to the code *'Government and tourism planning'* were similar to those findings of the previous case study cities, such as the lobbying activities of trade associations and foundations both to inform the responsible public authorities on the needs and expectations of the sector and to keep track of most recent tourism policies approved by the Parliament, the issues specific to Istanbul's tourism sector was also associated with the political standing of the Government and its approach to tourism development. Unsurprisingly, the lack of a consistent and long-term tourism plan was again repeatedly mentioned, as 7 out of 15 quotations included statements on changing tourism policies and strategies with every new government.

Two interviewees argued that the Government should consider outsourcing tourism planning and marketing to partnership organisations, where the sector and the local authorities unite their financial and administrative resources to overcome the problems caused by today's ineffective and ephemeral strategies. These interviewees further added that the combination of bureaucracy and the lack of expertise of the ministerial personnel prevents the Government from strengthening its standing as the strategic leader of the sector. While it is important to note that the interviewees were not aware of the current plans of the TCKTB on introducing regional tourism planning and marketing at the time of the interview conduction, the only positive expression was on the public initiatives at the initial phases of tourism development, when the Government built, managed and financed various hotel establishments. The following quotations summarise some of these views:

> *"Over the last twenty years, we have had 23 different ministers. This means that, on average, a minister occupies the position for less than a year. What could you possibly expect from an elected person, who does not know how long he will remain as a minister... This has a snowball effect, as the Minister, who is appointed by the Prime Minister, selects bureaucrats with whom he wants to work with. Therefore, with each minister, the executive personnel of directorates change too... They come with their own proposals and objectives. By the time they are ready to act on their plans, there is a new election. The newcomers invalidate the old policies and introduce something totally new. As a result, nothing much gets put into practice" [Istanbul Interview: 6].*

> *"Personally, I think that we need a major reform in the way we produce tourism plans. The Government cannot cope with the changing trends of the sector, as the whole public system is made slow and inefficient under the rigid regulations and rules of bureaucracy... The only way to assure sustainable*

growth and effective marketing would be through taking the policy making in tourism and culture from the Government and giving it to another authority, which works as a private partnership with a social orientation... Culture and tourism are too important to be just political instruments. It is difficult to understand how different political parties could have different cultural policies. After all, culture is something we have in common as a nation and the only policy should be to protect it with coherent and consistent plans along with the inherited sites and buildings" [Istanbul Interview: 10].

Same as the results of the Amsterdam and London interviews, the funding provided for tourism planning and marketing by the Government was found finite and insufficient by the Istanbul interviewees. The code *'Government funding for tourism'* was attached to 14 quotations, half of which embraced the views on the need for allocating continuous public financial sources to the development and marketing of the sector. The interviewees agreed that Turkey experiences economic burdens of a developing country and that the budget allocations require the identification of priority areas, where public spending is most urgent. However, it was also noted that the investment in tourism cannot be taken granted, as it leads to accumulated profits in numerous sub-industries and supplementary sectors. Overall, the interviewees stated that the improvement of infrastructure services, such as public transportation, requires more attention, as this particular aspect of product development can only be carried out by the determination and contribution of public authorities. Despite the criticism on the inefficient amount of Government funding in tourism planning, six interviewees mentioned that their organisations receive public support in the forms of grants, loans or sponsorships:

"When we go abroad to attend a trade fair, we are given free tickets by the Turkish Airlines. We are provided with a free stand by the Ministry. These are examples of an indirect support, which is important for us. The daily cost of a small stand in an international fair is about US$ 5,000. We cannot afford such expenses with our limited income sources" [Istanbul Interview: 2].

"The budget of the (Ministry of Culture and Tourism) is determined by the Parliament and is a fixed amount for a year. To start with, it is not enough to carry out satisfactory marketing activities in all possible countries... Secondly, a very small portion of the income generated through tourism activities, such as the entrance fees of the public museums and the VAT collected from tourism establishments, is paid back to the sector through public services to maintain and preserve tourist sites" [Istanbul Interview: 14].

As the above quotations indicate, the role played by the public authorities in the tourism management network was questioned by the interviewees. The centralised tourism planning was no longer considered to meet the prerequisites of the sector's development especially at a local level. However, the interviewees also acknowledged the fact that sustainable growth could only be accomplished through the co-operation of public and private sector organisations. Although the code *'public organisations'* was attached to a fewer number of quotations in Istanbul *-i.e. 7 quotations-* in comparison to London and Amsterdam partly due to the reasons given above, three interviewees mentioned that the contribution of public sector authorities is crucial in setting long-term goals and dealing with sector-wide matters such as restoring the image of Istanbul during crises times. Two other quotations included remarks on the expected role of the TCKTB on a national scale and its tourism directorates on a local one as the strategic leaders guiding and regulating the tourism management network. Moreover, the representation of tourism at a ministerial level where the statutory rights of the TCKTB are authenticated by law was noted to be significant for the well being of the sector.

The statements on private organisations corroborate the findings from the previous case studies and their existence was considered to rely on the effectiveness and profitability of their activities in a competitive market environment. Most of the 10 quotations attached to the code *'private organisations'* were about the achievements of the tourism establishments throughout the tourism development process in the city and the international standards met by various hotel operations, travel agencies and convention centres. The code *'semi-public organisations'*, meantime, embraces those views on the benefits of trade associations and foundations, which organise education programmes to raise service standards and board meetings to exchange information on current issues between member organisations. Most importantly, the efforts of semi-public associations to overcome the lack of integrated activities, which brings public and private sectors together through regular workshops and to lobby the sector's needs to the Government were found crucial. The problem, however, still remains with regard to the lack of co-operation among numerous associations each striving for the well being of different sub-industries and not necessarily safeguarding the tourism offer as a whole with all its essential components. Some of the quotations attached to these codes are as follows:

> *"Individual tourism establishments could not possibly be responsible for promoting Istanbul as a whole package. Without substantial public funding, promotion campaigns cannot be held in several countries... Besides, tourism is a complex phenomenon, which requires the attention of (the responsible authority) in a number of matters ranging from image creation to the security of visitors during their stay" [Istanbul Interview: 5].*

"We do organise international festivals, which contribute to the image of Istanbul as a world city. Unfortunately, the percentage of public sector sponsorship is too small compared to the financial backing we receive from private organisations" [Istanbul Interview: 3].

"There are numerous trade associations established on a national scale... Among these, the TURSAB, in my view, is the most influential one in terms of lobbying the Government and making the sector's voice get heard by the policy makers" [Istanbul Interview: 11].

The primary data findings discussed above offer some insight into how the interviewees perceive the functioning of the Ministry of Culture and Tourism (TCKTB) and the reasons behind its unaccomplished, but expected, role as a strategic leader of the tourism sector. Such statements specific to the TCKTB and its organisational structure are assembled in a group of five codes in order to assess the standing of the Ministry within the tourism management network as the leading tourism authority (LTA). Since the TCKTB is represented by the Istanbul Tourism Directorate (ITD) at the local level, any referring to the ITD is also joined with these codes. The first code titled *'leading tourism authorities'* was attached to 15 quotations. 12 interviewees stated that their organisation works in close co-operation with the Ministry, while four statements on the ITD focussed on irregular meetings with the local authority and the use of its services such as the distribution of promotional material published by the Ministry:

"We work in co-operation with (the ITD). There is no way that they could support us financially. They do not have the financial liability to provide grants and loans... But they run the tourist information centres across the city and distribute brochures, leaflets and posters. When we need to take some material to international fairs, we get in touch with them" [Istanbul Interview: 1].

The other four codes gathered around the code *'lack of confidence in LTAs'* indicate some major problems associated with the TCKTB. In fact, the code, which embraced general statements, such as the lack of long-term plans and the ineffective marketing activities of the Ministry, had the highest reoccurrence in Istanbul with 17 quotations in comparison to other two cities. In addition to bureaucracy and nepotism shown by four interviewees as the inhibiting factors for the effective functioning of the Ministry, two interviewees mentioned that they were unaware of the policies and activities of the TCKTB and that they were not provided with feedback in such matters. The inconsistency caused by the conflicting objectives of the consecutive governments was considered to further restrict information exchange between the Ministry and sector stakeholders. While one interviewee suggested that there was a need for radical changes in the organisational structure and responsibilities of the Ministry, two statements were regarding the unsatisfactory research activities conducted by the TCKTB and the incapacity of the authority to regulate, monitor and improve the quality standards in service establishments. The following two quotations are examples:

> *"Given the sector's importance for the economic development, (the Ministry of Culture and Tourism) should be one of the most respectable ministries in governmental circles. However, it shares the bottom place in the hierarchy of protocol with the Ministry of Environment. The Government should realise that these two ministries are the most important ones for the future of our country" [Istanbul Interview: 4].*

> *"It is difficult to say that (the TCKTB) works effectively... Take their research activities, for example. Statistical information on demand characteristics is highly valuable for the identification of marketing objectives. Their data is not accurate and does not cover every market segment. You could not get the statistics on how many conference delegates came to Istanbul last year and how much they spent here. You need to rely on the sources of individual organisations" [Istanbul Interview: 15].*

The most mentioned issues regarding the inefficient planning and marketing activities of the TCKTB were the lack of an integrated approach; the limited financial sources and; the lack of skilled personnel responsible for policy making. The statements on these matters were attached to the codes *'lack of co-operation'*, *'need for funding'* and *'need for more staff'*. Once again, all three codes were attached with a higher number of quotations *-i.e. 11, 13 and 9 quotations respectively-* compared to the recurrences of the same codes during the analysis of the interview findings from London and Amsterdam. As the findings suggest, the Ministry does not arrange formal consultation meetings with the stakeholders during the policy making procedure, which has led to the rejection of the strategies and objectives introduced and the controversies over their efficacy for tourism development. Moreover, the conflicting priorities of private organisations seem to have discouraged sector stakeholders to establish sector-wide partnerships to work toward shared objectives. As one interviewee stressed, the sector stakeholders need to be informed about the mutual benefits of corporate marketing and planning activities, while the Ministry should take the lead to bring them together in strategic alliances:

> *"Unfortunately, the concept of working in partnerships is not fully understood by all tourism organisations. When you volunteer to bring an international conference to Istanbul, some travel agencies and destination marketing organisations specialised in business tourism feel the right to protest your*

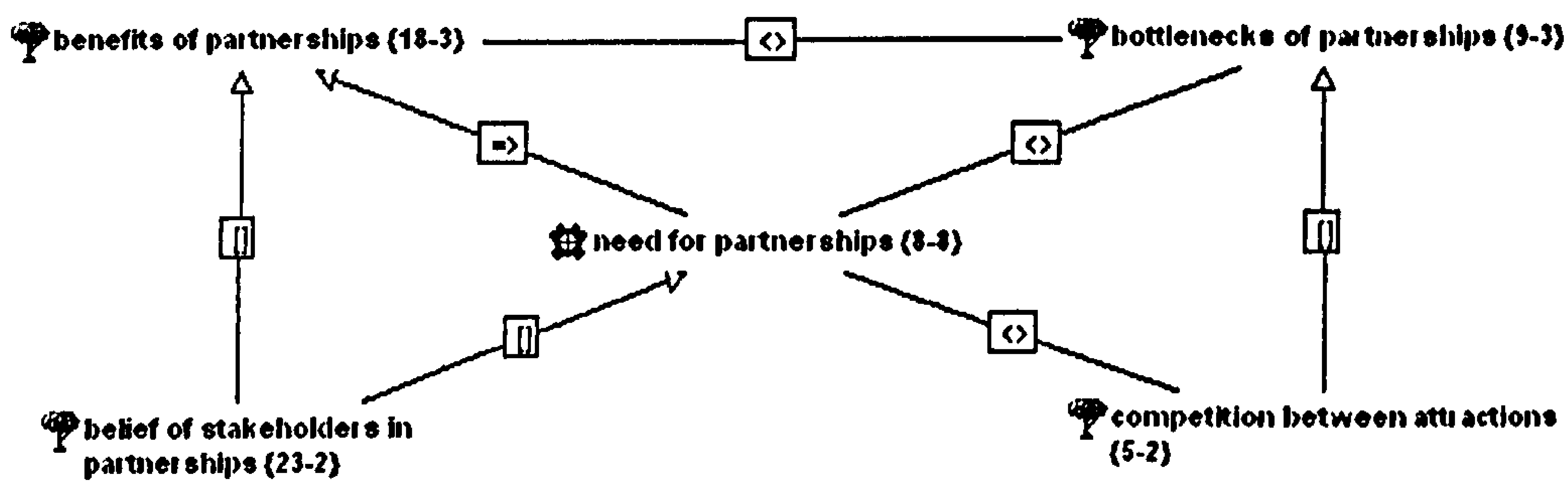
> *proposal and to justify their opposition with the fact that it is their job to involve in such arrangements. They refuse to work in co-operation, as more players involved in the event means lost revenues for them... Whether the TCKTB is putting any effort into improving this situation and educating key managers on the benefits of partnerships is another question" [Istanbul Interview: 5].*

The last code in Figure 7.5 is entitled *'community acceptance of tourism'* and was previously discussed in Section 6.4.3.3. Briefly, the code was attached to 9 quotations, most of which referred to the hospitality and friendliness of Turkish people and their positive attitudes toward tourism development and visitors. It was further noted by one interviewee that the friendly approach of the local people is one of the strong aspects of Istanbul as a tourist destination and contributes strongly to the reparation of pre-arrival negative assumptions and perceptions among staying visitors. The only concern was raised regarding the residents' biased conception of the visitors from the Eastern European and Russian markets. The widespread belief is that visitors from these countries are either smugglers purchasing cheap products or women involved in prostitution. Considering the great potential of these markets for the tourism sector in Istanbul, such misconceptions need to be rectified preferably through the broadcasting of education programmes on popular television and radio channels.

The second network of the codes are shown in Figure 7.6 and offers insight into the sector-wide collaboration in Istanbul and how the interviewees perceive the benefits and drawbacks of partnership establishments. The code *'need for partnerships'* is placed at the centre of the figure and embraces 8 general statements on the importance of integrated policy making and the creation of a one-voice approach in tourism development and marketing. Overall, the Istanbul interviewees agreed that partnerships bringing public sector funding with the managerial skills and commercial expertise of private sector would help overcome the existing problems caused by the lack of a strategic authority and the centralised tourism planning of the TCKTB. The following quotation summarises such views:

> *"We can resemble tourism to an orchestra. Every musician in the orchestra should play harmoniously and in line with what the others are playing. If we think that the Government is the conductor of the tourism orchestra, there are also other various subgroups, which should work in co-operation. If they start to play different songs at the same time, the harmony would turn into chaos" [Istanbul Interview: 9].*

Figure 7.6. The Network of Partnerships in Istanbul



Even though the code *'benefits of partnerships'* was attached to a smaller number of quotations in Istanbul -*i.e. 18 quotations*- in comparison to the findings from London and Amsterdam -*i.e. 22 quotations in each*-, the advantages of working in co-operation mentioned by the interviewees of all three cities were similar. Therefore, the issues such as the accelerated tourism growth; the accomplishment of shared objectives; pooling administrative and financial resources to gain economies of scale; the creation of a one-voice approach in marketing activities; the exchange of trade information between member organisations; lobbying sectoral needs and expectations to governments and; the organisation of education seminars and training programmes for partners were also repeated in respect to collaboration among sector stakeholders by the key personnel of the leading tourism organisations in Istanbul. The only other issue mentioned by one interviewee was that partnerships, which bring small-sized tourism businesses together with the leading attractions and organisations would help expand the tourist offer of Istanbul. This, as a result, was argued to enhance the competitiveness of Istanbul, which would appeal to wider market segments with a larger number of tourist products and services promoted as components of the overall product package. Some examples of these quotations are as follows:

> *"Partnerships and foundations are important players of the tourism sector, especially if they are established as semi-public organisations bringing public and private sector members together... Since we are not a private company, our main goal is not profit-oriented. As we are neither a public organisation, we are not involved in politics. We are just trying to pull the resources of these two sectors together and to achieve an important objective of establishing a better place for Istanbul in the convention and conference market. To do that, we need to support of all sorts of organisations and businesses" [Istanbul Interview: 2].*

> *"The new trend in the tourism sector is to establish partnerships and it is widely practised around the world. If they are established as organisations*

bringing together the businesses operating in the same industry, they help to introduce quality standards and to monitor whether such standards are met by their members. Besides, members get together to discuss current trends, exchange information and search for alternative solutions to their uniform problems" [Istanbul Interview: 12].

The code *'bottlenecks of partnerships'*, on the other hand, covers the quotations indicating why sector stakeholders hesitate to co-operate with each other and what obstacles restrict partnerships from emerging within the tourism network of Istanbul. Among the reasons, red-tape and a top-down public administrative system were mentioned by four interviewees as the impeding factors for the establishment of public and private sector partnerships. As one interviewee argued, rigid rules and regulations make it difficult for any public authority to be a partner of a strategic alliance, yet alone to take the lead to foster a corporate approach. In addition, the changing political agendas of consecutive governments were mentioned to cause confusion over the areas each government pays attention to. Therefore, the interviewees seemed to be sceptical about any partnership established by a government to serve the aims and objectives of an existing tourism policy and whether it would be of a permanent nature or would be eradicated by the successor government in the future.

Other reasons shown for the distrust in partnerships revolved around the fact that there is a lack of vision among the key personnel of various tourism operations, who often misunderstand the concept of uniting forces to achieve shared objectives. Three interviewees mentioned that unskilled managers, who consider their organisations to be in competition with other tourism products and services existing in the city, refuse to support an integrated approach. Finally, one interviewee argued that even if various organisations representing different sub-industries are brought together, the establishment of a consensus regarding the identification of priority tasks is often difficult with each sub-industry expecting its issues to be dealt with first. The following comments refer to some of these problems:

"The problem of Istanbul (as a tourist destination) is those managers, who concentrate on finding short-term solutions to today's problems, but ignore what may be needed tomorrow. Everything is dealt with on a daily basis... Even those (associations and foundations) do not prepare compatible plans for the future needs of the sector. They are concerned about the problems faced by their members, but do not seem to understand what is needed on a wider scope. It is crucial that we all appreciate the importance of working together" [Istanbul Interview: 6].

"Communicating with public authorities is extremely tiresome. Imagine a pavement work uncompleted or a pile of garbage uncollected in front of a landmark attraction. You call who you think is responsible for such services at the municipality. You get directed to someone else. Soon after, you just realise that it is almost impossible to find the right person for the job, even though you might have talked to hundreds of people. This is not how co-ordination works. Instead of bureaucracy, you need logical and stable practices to problem solving" [Istanbul Interview: 9].

"We use every opportunity to co-operate with other organisations. We organise and participate in seminars and workshops. But, the public authorities, especially the Ministry, seem to be undetermined about collaborating with the sector, whereas it should be their task to initiate an integrated approach" [Istanbul Interview: 13].

In order further to assess the level of competition between tourist organisations and its impact on creating a one-voice approach, the interviewees were also asked to comment whether harmful competition is in place in Istanbul and whether such a situation jeopardises the competitiveness of the city as a product package. 5 quotations attached to the code *'competition between attractions'* include some specific statements regarding the incompatibility of different visitor attraction types and the difficulty to package them within the same offer. As the following quotation summarises, the comparison is often made with respect to varying market segments attracted and targeted by different visitor attractions, which is falsely interpreted as not enough objectives shared for co-operation:

"Over the last 5 years, there has been an outburst of modern shopping centres in Istanbul. They may be in competition with each other. There are at least 3 or 4 big ones scattered across the city. I do not think, however, that the Grand Bazaar is in competition with such new centres. Our main market is international visitors, whereas they mostly appeal to residents and domestic visitors. There may be an international visitor, who leaves Istanbul without paying a visit to Akmerkez -i.e. a shopping centre-. But I cannot imagine (him/her) not coming to the Grand Bazaar... Our offer does not suit theirs. Therefore, it is difficult to put them together in one package " [Istanbul Interview: 14].

The last code in Figure 7.6 is *'educating stakeholders'* and was previously discussed in Section 6.4.3.3 in reference to the quality of the total product package of Istanbul. Briefly, nine quotations attached to the code share the argument that there is a need to educate the key personnel of the leading tourism organisations about the benefits of partnerships and alliances. The interview findings suggest that the tourism organisations are not fully aware of how establishing a one-voice approach in marketing and development activities would help their organisations and that there are not enough education programmes and seminars run collaboratively by the associations representing different sub-industries.

To conclude, the interview findings on the tourism management network in Istanbul confirm the arguments raised during the analysis of the leading tourism authorities and their objectives and activities. In short, the belated shift from central tourism planning to regional and local one needs to be expanded across the country with the Ministry of Culture and Tourism (TCKTB) diverting some of its responsibilities to local tourism directorates or municipalities. Although Istanbul has been selected as the first city in Turkey, for which a destination-based planning and marketing will be pursued by the TCKTB, the lack of co-operation among sector stakeholders and their contribution to the policy-making procedure remain as impeding factors for the establishment of an integrated approach toward tourism development. To overcome this problem, restructuring the Istanbul Tourism Directorate or creating a new tourism authority free from bureaucracy and capable of becoming a strategic leader of the tourism sector seems inevitable.

7.3. Strategic Tourism Marketing in the Cities: Practice and Prospect

So far in this research, Chapter 6 looked at Amsterdam, London and Istanbul from the perspective of a product package concept, investigating the cities' characteristics as urban tourist destinations with the application of life-cycle, carrying capacity and SWOT analyses. The previous sections of this chapter assessed the tourism management networks established in each city and the tourism policies addressed and practised to develop and flourish the sector and to compete successfully in the international and domestic visitor markets. In the following final sections of the primary data analysis, the focus is on the marketing tools and techniques exercised by the leading tourism authorities in order to accomplish the targets and goals set in their tourism development and marketing plans. To this end, the current marketing activities of the concerned authorities will be evaluated along with the interpretation of the interview findings to understand how each city strives to succeed in the international arena and how successful their efforts are found by the key stakeholders.

Although every city destination combines a unique set of tourist services and products in its product package and ideally aims to strengthen its offer with tailor-made policies, one way of measuring their success is to compare their efforts with those of competitors. This is why, before the marketing tools used by each city are discussed, the interview findings on the international and national competitors of Amsterdam, London and Istanbul will be presented in the following section. The comparison with competitors, albeit without the support of detailed and specific research on the subject, is considered to further strengthen the understanding of the cities' offer as marketable products and to examine their place among the major city destinations, both in the international and national markets.

Since effective destination marketing should search for optimisation in meeting the needs and wants of potential and existing visitors with the business expectations of sector stakeholders, the marketing segments targeted by each city are also covered in the following sections. Segmenting the market is carried out under three sections, namely international and domestic tourism marketing; geographical distribution and major visitor generator countries and; segments identified according to the purpose of travel. Once again, the emphasis put on specific market segments in the actual tourism plans are compared with the results of the interview analyses. The evaluation of market segments contributes to the analysis of the promotional input selected by the case study cities for particular segments and serves to confirm whether segment-specific marketing activities are supported by the feedback from sector stakeholders or not. While the chapter finishes with the exercises and prospects of image marketing and marketing research, it is important to note that the fundamental criterion for successful destination marketing lies in the preparation of consistent, corporate, and coherent marketing plans (Buhalis, 2000). So called *'strategic marketing'* appreciates the importance of short-term tactics and action plans implemented within the framework of broader long-term goals, and will be the key term in assessing the marketing activities of the case study cities in the following sections.

7.3.1. Competitiveness: International and National Competitors of the Cities

As Kozak and Rimmington (1999) note, when comparing destinations according to their competitiveness, there is a need to identify a set of elements, which suggest the concerned destinations are in direct competition with each other. The authors add that destination competitiveness can be evaluated both quantitatively and qualitatively. Quantitative performance relates mainly to the comparison of tourism statistics such as tourist arrivals and tourism income. Qualitative aspect of competitiveness, meantime, is associated with the intangible characteristic of tourist services and can only be measured with satisfaction surveys. The components of a tourist product package, which visitors like or dislike, determine the relative competitiveness of a destination in comparison to its competitors. The problem, however, arises with regard to the competitiveness set of a destination shaped by unique features such as its geographical location, history, variety of products and services, the evolution of the tourism sector and the tourism management network. Thus, it is almost impossible to draw irrefutable conclusions from the competitiveness studies comparing alternative tourist offers in the international arena.

Another approach to examining competitive positions of a destination is to review the long-term profitability of the sector and the comparison of its health with those of other economic sectors performed within the destination (Melian-Gonzales and Garcia-Falcon, 2003). According to this so-called *'resource-based'* evaluation, measuring competitiveness involves an analysis of internal aspects and the overall profitability of establishments and organisations operating in the sector. Success is often brought about by sustainable development and effective management practices and, is ensured by community participation in tourism and the quality of tourist products and services as well as the accomplishment of a desirable tourism income.

In the literature, there are several studies comparing city destinations according to their particular characteristics and assets. The annual *'European Cities Monitor'* conducted by a private consultancy firm since 1990, for example, compares major cities in Europe according to their credibility as business locations. The results of the 2002 survey conducted on senior executives of over 500 European companies showed that London has maintained its leading position since 1990 as the best city in Europe to locate a business, whereas Amsterdam comes fifth after Paris, Frankfurt and Brussels. The criteria the interviewees found essential in selecting a location for their business include the availability of qualified staff; accessibility to markets; transport links; the quality of telecommunications; the cost of labour and office space; the government policies and regulations; the languages spoken by potential staff; the quality of life for employment and; the level of pollution. Among these criteria, London scored poorly only on the level of pollution, the value for money of office space and the cost of staff. The best assets of Amsterdam, meantime, were the climate created by governments and the languages spoken by staff (Healey & Baker, 2002).

When the executives were asked in which European cities their organisations have offices, production or sales outlets and, which cities they might consider in the case of future operational expansion, Paris was mentioned most, while London and Amsterdam were second and eighth respectively in the list. Istanbul, meantime, was positioned in 34th place, beating only relatively smaller cities such as Bucharest, Luxembourg and Turin. More than half of the organisations represented in the survey *-i.e. 53%-* considered future expansion in London until the year 2006. The same figures for Amsterdam and Istanbul were 30% and 9% respectively. Moreover, while 91% of the executives expressed their familiarity with London as a business location, Amsterdam scored 70%. Familiarity with Istanbul was comparatively poor, as only 3% of the executives mentioned that they knew the city very or fairly well. Dublin was ranked the best city in promoting inward investment followed by Barcelona, Paris, Madrid and London. Amsterdam came ninth after the first five, Berlin, Frankfurt and Brussels (Healey & Baker, 2002).

Another example of destination comparison studies is the research by Mazanec (1997d), which regards 16 European cities, including London and Amsterdam, as providers of tourist services and is based on a supply-oriented approach, where macro tourist statistics on international overnight stays in accommodation establishments are used to measure the scale of tourism in each city. The overall assumption of the study is that the selected city destinations base their marketing effort on a geographical segmentation approach, hence are expected to compete with each other more if they target same visitor markets. In order to assess the competitiveness of the cities, the author compares the evolution of visitor arrivals from 18 major visitor generating countries to the cities in a 15 year period along with the growth of domestic tourism in each of them.

The analysis of each city's guest mix and the changing trends of generating visitor markets shows that London and Amsterdam are more likely to be in competition with cities like Rome, Madrid, Brussels, Paris and Lisbon. The newcomer Eastern European cities such as Budapest and Prague, on the other hand, are in competition with Zurich and Vienna. The next group of cities competing to attract same visitor markets consists of the Scandinavian capitals including Oslo, Helsinki and Stockholm (Mazanec, 1997d). These results according to the guest-mix approach suggest that the competition between tourist destinations could arguably be identified with the similarities of two destinations in accessibility, product offer and geographical location as well as the historical evolution of tourism and the familiarity with the destination among potential visitors.

Grabler (1997b) investigates competitiveness from a demand side approach. The author aims to understand how potential visitors perceive cities as similar tourist product offers and substitutes of each other, which as a result, indicate the competition between them. His research contains a field study conducted on German and British travellers, on short city breaks for leisure purposes, and provides findings on 30 European city destinations. According to the author, the geographical vicinity and the uniqueness of the product offer are clear indicators of competition. Moreover, the big players, including London, Berlin, Paris, and Amsterdam, are in competition with each other and could only be substituted by another city from the same group.

Amsterdam, however, is an exception. Although the city's position is regarded as unique, its offer is found compatible with those of Dublin, Edinburgh, Brussels and Helsinki, hence substitutable with such destinations in the minds of potential visitors. Istanbul, on the other hand, offers a more complicated picture. From one perspective, the city exists in a cluster of southern cities, which are perceived as similar holiday destinations including Athens, Lisbon and Barcelona. From another perspective, it competes with the destinations within its perceived geographical vicinity extending from Budapest and Prague to Rome. Finally, due to the level of unfamiliarity with the city and its offer, Istanbul is argued to be in competition even with such cities as Munich and Cologne. According to the author, cities like Istanbul, which are attractive but far away, are easy trade-offs for leisure holiday-makers and often find themselves in competition with those popular localities nearby to visitor generating markets (Grabler, 1997b).

7.3.1.1. London: Competition Among World Cities

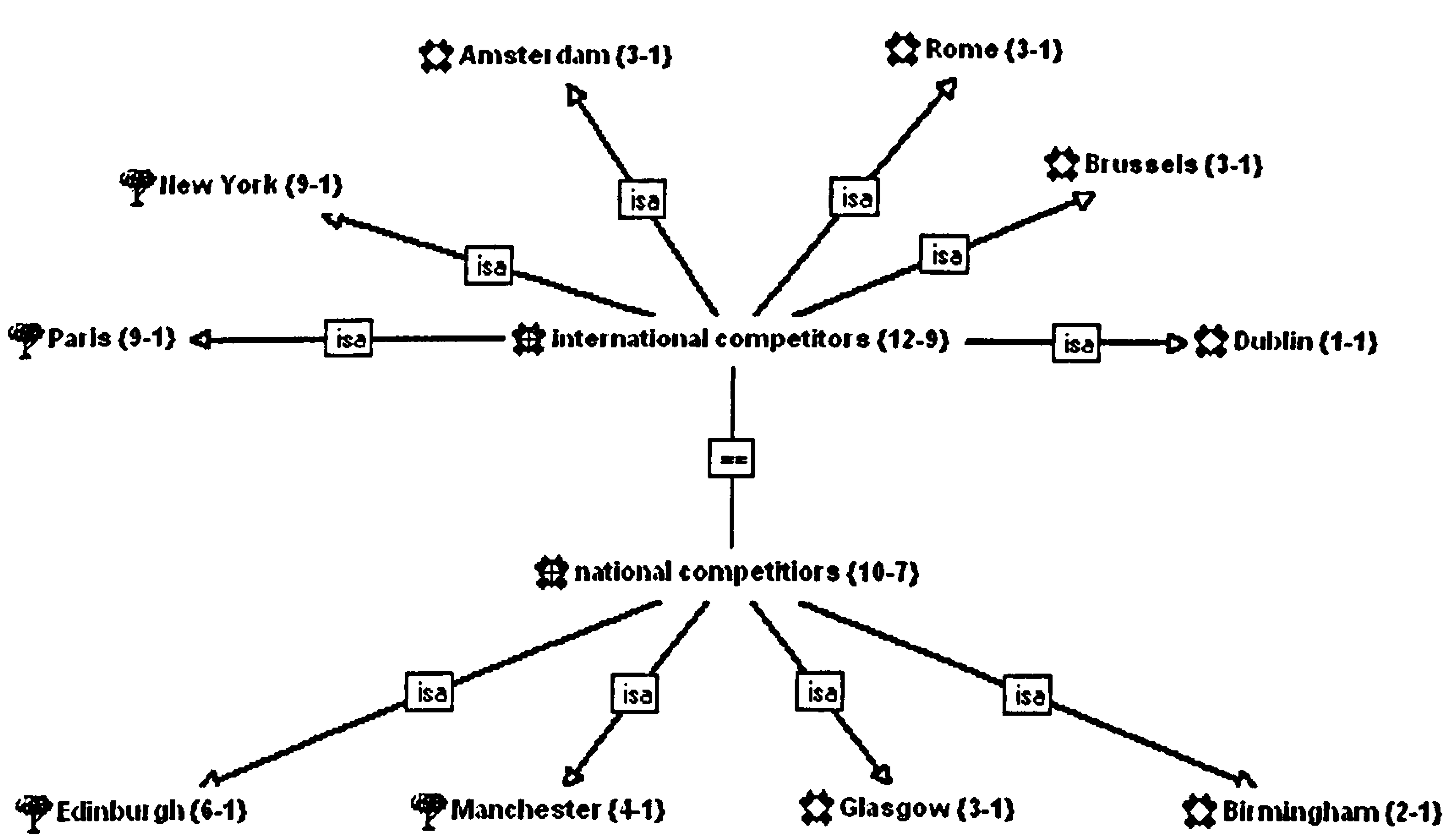
As discussed in the previous sections of this chapter, the recognition of the fierce competition by the leading authorities of the case study cities reflects itself in the missions and aims highlighted in their tourism development and marketing plans. Any statement regarding tourism growth could be related to competing successfully in order to win visitors over competitors and to increase tourism income. The recent report by Visit London (VLL, 2003a), for example, repeatedly refers to the *'leading world city'* status of London as a tourist destination and aims to build better intelligence for increased competitiveness and to retain the city's position in domestic and international markets. It is also mentioned that London benefits from its unrivalled appeal in comparison to most city destinations and especially to those other European capitals, while its major competitors are considered to be other world cities including Paris and New York. Moreover, it is often noted that London has limited capacity for large-scale events and needs a new international convention centre to improve its competitive advantage against those cities like Dublin and Brussels, which have recently earned themselves a reputable place in the business and MICE tourism markets (VLL, 2003a; GLA, 2002c; LTBCB/LDA, 2003).

The interview results on the competitors of London present a similar picture and are shown in Figure 7.7. The 12 quotations referring to the competitiveness of the city in the international market are assembled under the code *'international competitors'*, while those international city destinations, which are mentioned as the major competitors of London, are scattered around this code. Two third of the 12 quotations attached to the code were regarding the *'world-city'* status of London along with its unrivalled appeal as a tourist offer. In line with the statements made in the publications of the local authorities, the interviewees agreed that the major competitors of London are the other world cities, particularly Paris and New York, each having links to 9 quotations.

Despite the fact that New York is in a different geographical location and that there are several capitals and cities striving for more visitors and tourism income in the European market, there was a remarkable difference between the quotations attached to these two major competitors and the other European cities mentioned. While Amsterdam, Rome and Brussels were named as competitors by three interviewees, only one interviewee referred to Dublin and its potential threat for London in the MICE market. Overall, the interview findings show that the key stakeholders represented during the primary data collection acknowledge the increasing competition in the international tourism arena and aim to restore their organisations and offers in order to minimise the possible negative impact of fierce competition in the London tourism sector. While three interviewees stated that they were constantly monitoring new tourism developments and investment projects taking place in other countries, one interviewee argued that London is often sold in packages with other European cities to the North American and Far Eastern visitors travelling for leisure purposes, which, to a certain extent, diminishes the level of competitiveness within Europe in the long-haul market. Examples of these quotations are as follows:

> *"Paris is our major competition. They have as much historical interests as we have... In theory, we compete with all destinations. But they can also be sold together. Paris and London, in particular, make a very good combination to the North American market... Some of the Japanese tour operators also combine the European cities especially in the elderly market. Selling them together appeals to those visitors from long-haul destinations, who have no or limited perception of the cities in Europe and want to cover as many places as possible during their stay here" [London Interview: 8].*

Figure 7.7. Competitors of London



> *"I do not think any city could rival London. Obviously, in a European context, there are some cities which are quite attractive like Paris and Amsterdam. On the world-wide scale, it may be New York. But I do not think they have the scope in scale of attractions that London has. I have been to a lot of European capitals. There are some competitors. But again, with EuroStar, Paris is only*

3 hours away... I do not think this advantageous position of London will change in the future. It will remain a world-wide tourist spot" [London Interview: 13].

Although there were 10 quotations attached to the code *'national competitors'*, most of the statements hinged upon the gateway position of London to the rest of the country, hence its unique position as the leading tourist destination of the UK. Although three interviewees noted that they keep track of the tourism initiatives offered to other cities in the UK and the tourism growth patterns of major destinations in the domestic market, they argued that London would remain its importance for the national tourism sector for many years to come. The most mentioned city destinations as competitors of London in the domestic market were Edinburgh and Manchester, which were linked to 6 and 4 quotations respectively.

As one interviewee argued, Edinburgh benefits from its cultural and historic products as well as alternative nature-related offers within its close vicinity in Scotland. The advantageous position of Manchester, on the other hand, was associated mostly with the business market. Similarly, the international conference and exhibition centre built in the early 1990s was argued to strengthen the product offer of Birmingham, which was named as a potential competitor especially in the MICE market by two interviewees. Finally, Glasgow was mentioned by three interviewees, who found the efforts of the local authorities to transform this formerly an industrialised city into a cultural centre, successful and inspiring. The following quotations embrace some of these views:

"In the national market, London's biggest rival, in my point, is Edinburgh. They now organise tours taking visitors of London to Scotland. I suspect that the increasing importance of the environment when holiday taking plays an important role in choosing Scotland for organised tours. Visitors have the chance to go for walking, trekking and observing the nature, while Edinburgh provides history, shopping and entertainment" [London Interview: 10].

"On the national basis, London is unrivalled because of its gateway situation. 7 out of 10 visitors to the UK, start their journey from London or, at some stage of their holiday, they visit London. Some of the major tourist boards of the British cities, such as Manchester and Glasgow, have recently succeeded in their promotional campaigns and their actual figures have transcended their goals. However, London will always be the most important tourist destination in the UK with its visitor numbers and the variety of products it offers" [London Interview: 1].

7.3.1.2. Amsterdam: Competition At Home and Abroad

Amsterdam, which has experienced significant visitor fluctuations in its recent history as a tourist destination, is arguably the most vulnerable case study of this research to the increasing competition in the tourism market. Dahles (1998) noted that Amsterdam has failed to maintain its popularity within the expanding European market, while the newcomers such as Dublin, Budapest and Edinburgh have been threatening the city's position within the most visited European destinations league since the early 1990s. As discussed earlier in this research and mentioned by the author, the decline in visitor arrivals is associated with various factors like an unsafe image, the appealing offers of the newcomer Eastern European capitals, new holiday trends induced by globalisation, the lack of a major landmark and the increasing number of destinations investing in tourism development as well as exclusive promotion campaigns. From a pessimistic view, the author adds that unless necessary precautions are taken to strengthen the city's offer, Amsterdam may disappear from the top ten of the most visited European destinations, in which case the image recovery and success could only be achieved in the long-run with an immense amount of public money and effort spent on tourism development and re-branding.

The threatened position of Amsterdam has also forced the Amsterdam Tourist Board (VVV) to investigate the relative competitiveness of the city in comparison to other European destinations measured by the number of visitor arrivals and international overnight stays. In fact, the tourism and marketing plans published by the organisation have all had sections on the subject and have assessed the standing of Amsterdam within the increasingly competitive international tourism arena (VVV, 1994, 1997 and 2000a). While Amsterdam was still considered to be among the major European destinations along with London, Rome and Paris in 1994, the marketing plan published in 1997 approaches the concept of competitiveness in more detail and pinpoints the emerging new destinations and their potential impact on shifting tourism movement within the continent.

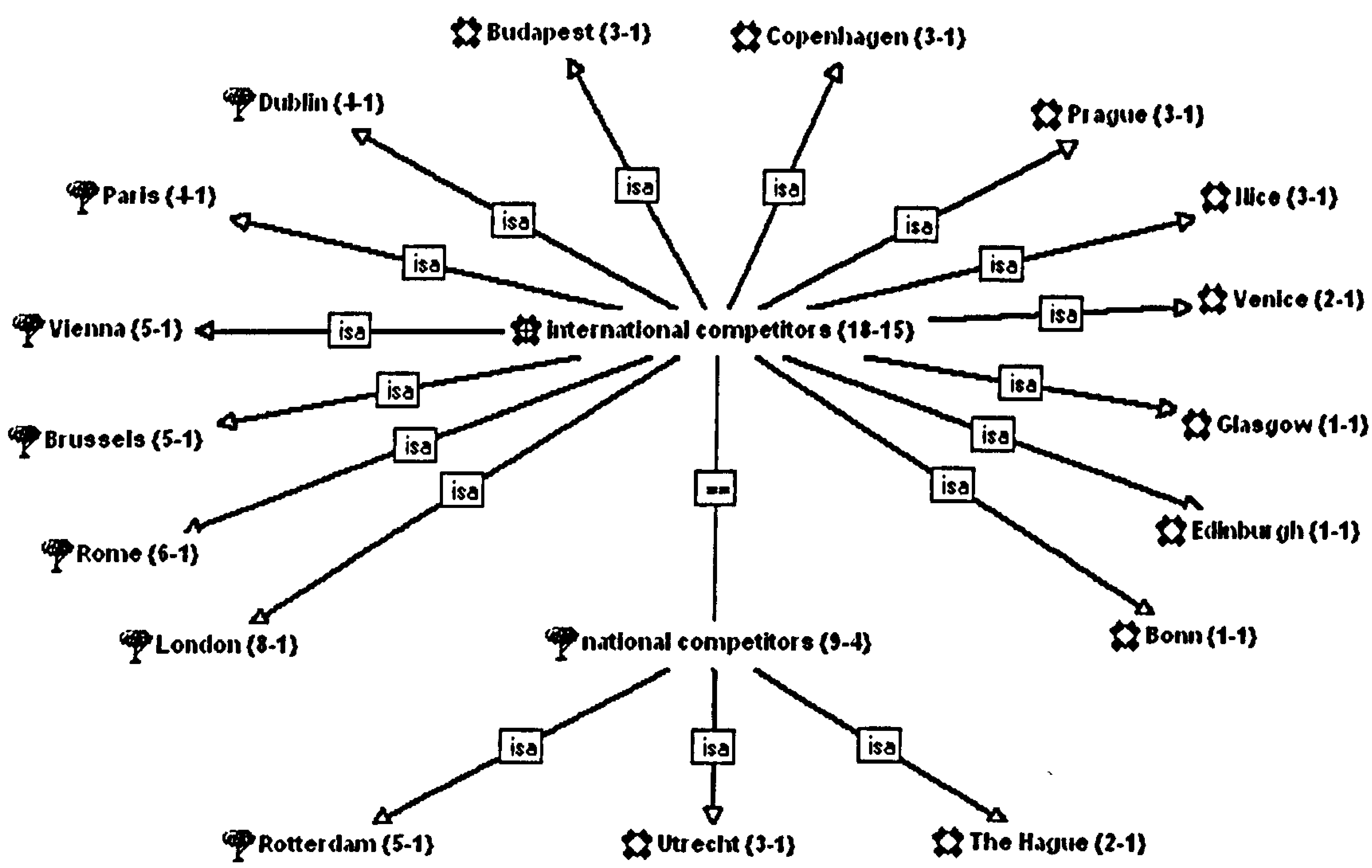
In the marketing plan covering the period 1998-2000, the research carried out by a private consultant organisation with a quantitative approach assessing the relative competitiveness of Amsterdam through comparing tourism statistics of 34 European destinations is compared with a qualitative study carried out by the Federation of European City Tourism Offices (FECTO), which consisted of a questionnaire survey applied to executive managers of major tourism organisations in member countries (VVV, 1997). While, according to the first research, Amsterdam was in 4th place in Europe after London, Paris and Rome, it was considered to be more in competition with those cities, which account for annual international arrivals within the range of 5 and 6 million near to the over 6 million total of Amsterdam, -*i.e. Vienna, Prague, Dublin and Nice*-. The cities with the highest growth rates in international arrivals, meantime, were considered as potential competitors and included Edinburgh, Munich, Brussels, Milan and Berlin. The qualitative research by the FECTO provided similar results, which argued that Amsterdam is in competition with most of the cities mentioned above albeit with some exceptions. While Barcelona, Madrid, Athens, Istanbul, Lisbon and Copenhagen are listed among potential competitors, Edinburgh, Nice and Dublin were not seen as strong rivals threatening the health of Amsterdam's tourism sector.

The recent marketing and development plan covering the period 2000-2004 provides further insight into the current standing of Amsterdam in the European league and analyses competitiveness from the viewpoints of emerging destinations, tourism promotion campaigns of competitors and the tourism development projects supported by both government and private sector funds in other countries (VVV, 2000a). Although the plan states that Amsterdam maintained its position of 4th place in Europe, the city lagged behind the 30 European cities, which increased their visitor arrivals at least by 10% within the period 1996-99 in comparison to the 6% increase achieved by Amsterdam. Dublin, Prague, and Madrid were the most successful cities, which moved up the most visited destinations list and improved their standing in Europe. Although not placed within the top ten, Barcelona, Lisbon and Munich with the growth rates of 14%, 32% and 17% respectively, were expected to become strong competitors in the near future.

The higher number of quotations attached to the codes *'international competitors'* and *'national competitors'* during the primary data analysis of Amsterdam in comparison to the interview findings from the other two cities also indicates that the sector stakeholders are concerned about the fierce competition and pay great attention to the fast changing demand and supply trends shaping the tourism market and influencing the position of Amsterdam in relation to its competitors. As Figure 7.8 illustrates, there were 18 statements and referrals linked to the code *'international competitors'* along with 14 different cities shown as the competitors of the city.

The general expressions of the interviewees on the competitiveness of Amsterdam mainly concentrated on four key issues. Among these, the lack of product improvement and the market expansion under the effect of the newcomer Eastern European cities were the most mentioned factors causing lost opportunities for Amsterdam. While four interviewees stated that the tourist offer of the city needs to be improved with more services and products inducing heavier visitor traffic especially in the segments of MICE and culture tourism, three interviewees pinpointed the popularity gained by emerging destinations like Budapest and Prague in the short-break leisure market. The other two issues regarded the need to measure the competitiveness of city destinations according to the market segments targeted and the cheap offer of Amsterdam, which strengthens its advantageous position. Overall, only two interviewees, representing public sector organisations, were confident about the current position of Amsterdam within the competitive environment and referred to its unique selling points, namely heritage, culture, and the accessibility of the city to the major visitor generator countries, as the factors securing the tourism sector's well-being.

Figure 7.8. Competitors of Amsterdam



Among the cities named as competitors, London came first with 9 quotations. However, most of the interviewees, who mentioned London, also added that it would be unreasonable to expect Amsterdam to attract as many visitors given its geographical size and existing tourism capacity. Paris, with four quotations, is another example, which was shown as a *'successor'* but not so much as a *'competitor'*. London was followed by Rome, Vienna and Brussels. While Rome and Vienna, which were attached to 6 and 5 quotations respectively, were considered as traditional competitors targeting similar visitor markets with product offers concentrating on culture and heritage same as Amsterdam, Brussels, also repeated 5 times during the interview analysis, was argued to gain importance as a tourist destination with the establishment of the European Community and the selection of the city for the location of the European Parliament. The statements on Dublin and Copenhagen -*i.e. 4 and 3 quotations respectively*- were mainly about the increasing popularity of these destinations in the convention and exhibition market and the remarkable efforts of their leading authorities to develop and promote the tourism sector. Nice, Venice, Edinburgh, Glasgow and Bonn were the other cities detected as the competitors of Amsterdam during the interview analysis:

> *"The big players are Rome, Paris and London. We cannot really compete with these destinations. Anybody, who comes to Europe, wants to go to these cities*

first. They then choose between Amsterdam, Prague, Budapest and Dublin. Realistically, these are our major competitors... Copenhagen is getting better in the conference business" [Amsterdam Interview: 3].

"At the moment, the biggest competitors of Amsterdam are Copenhagen and Budapest. When you look at Copenhagen and its success over the recent years, you see that they are involved in serious partnership projects, where money from both public and private sector members is funnelled into tourism projects. They use some of that money for marketing their city, too. That is what we should do in Amsterdam... London, of course, is the leading destination in Europe... Brussels has gained an important status by becoming the capital of the European Union" [Amsterdam Interview: 11].

The competition that Amsterdam is facing in the international arena, is further stiffened by the major Dutch metropolitan areas investing in tourism. As Dahles argues (1998), although the city is still perceived as the cultural capital and gateway of the country, it has started to compete with other cities in the Randstad area, namely Rotterdam, The Hague and Utrecht, and more recently with Maastricht in the south. The assets and characteristics of these cities highlighted in their promotional activities are quite distinct from what Amsterdam offers. Rotterdam, an important harbour city in the Northern Europe, for example, has been focussing on its transformation from an unattractive industrial city onto a cultural one with most competition felt by Amsterdam in the business and convention tourism markets. While The Hague benefits from its status as the capital city where the Parliament and ministerial offices are located, Utrecth, with the slogan *'City of Cathedrals'*, draws attention to its heritage as well as culture (Dahles, 1998; VVV, 2000a).

As the interview findings suggest, competition among the Dutch cities is more evident in terms of domestic tourism and those visitors from the neighbouring countries. More than half of the quotations attached to the code *'national competitors'* is about the advantageous position of Amsterdam in the Netherlands and its importance as the gateway to the country especially for first-time international visitors. While five interviewees stated that the city cannot be rivalled by its national counterparts, three interviewees discussed the possibilities of marketing the Randstad area as a single package. The shared opinion of these interviewees was that Rotterdam, Utrecht and the Hague would benefit more from being within the same package with Amsterdam than the other way round. Despite the efforts of these cities to engage in tourism, the interviewees argued that their current inefficient tourism supra-structure is yet to pose any threat for Amsterdam in the international arena. Given further investment and continuous promotion campaigns, Rotterdam, Utrecht and the Hague were considered to become strong competitors in the future, which were repeated 5, 3 and 2 times respectively during the analysis of interview findings. The following quotations cover some of these opinions:

> *"Promoting the Randstad as a region seems to be a good idea. You can organise daily excursions between the cities. By all means, Amsterdam is the frontrunner in this country. But the others, especially Rotterdam, have been working on improving their offer over recent years... There are business visitors who prefer Rotterdam to Amsterdam" [Amsterdam Interview: 1].*

> *"Rotterdam has emerged as a new destination with its modern architecture... Utrecht is also working on becoming a conference town. But they do not have enough hotels to accommodate more visitors. Besides, building conference centres is not enough. No matter where they go for business, people would like to come to Amsterdam for culture and entertainment" [Amsterdam Interview: 12].*

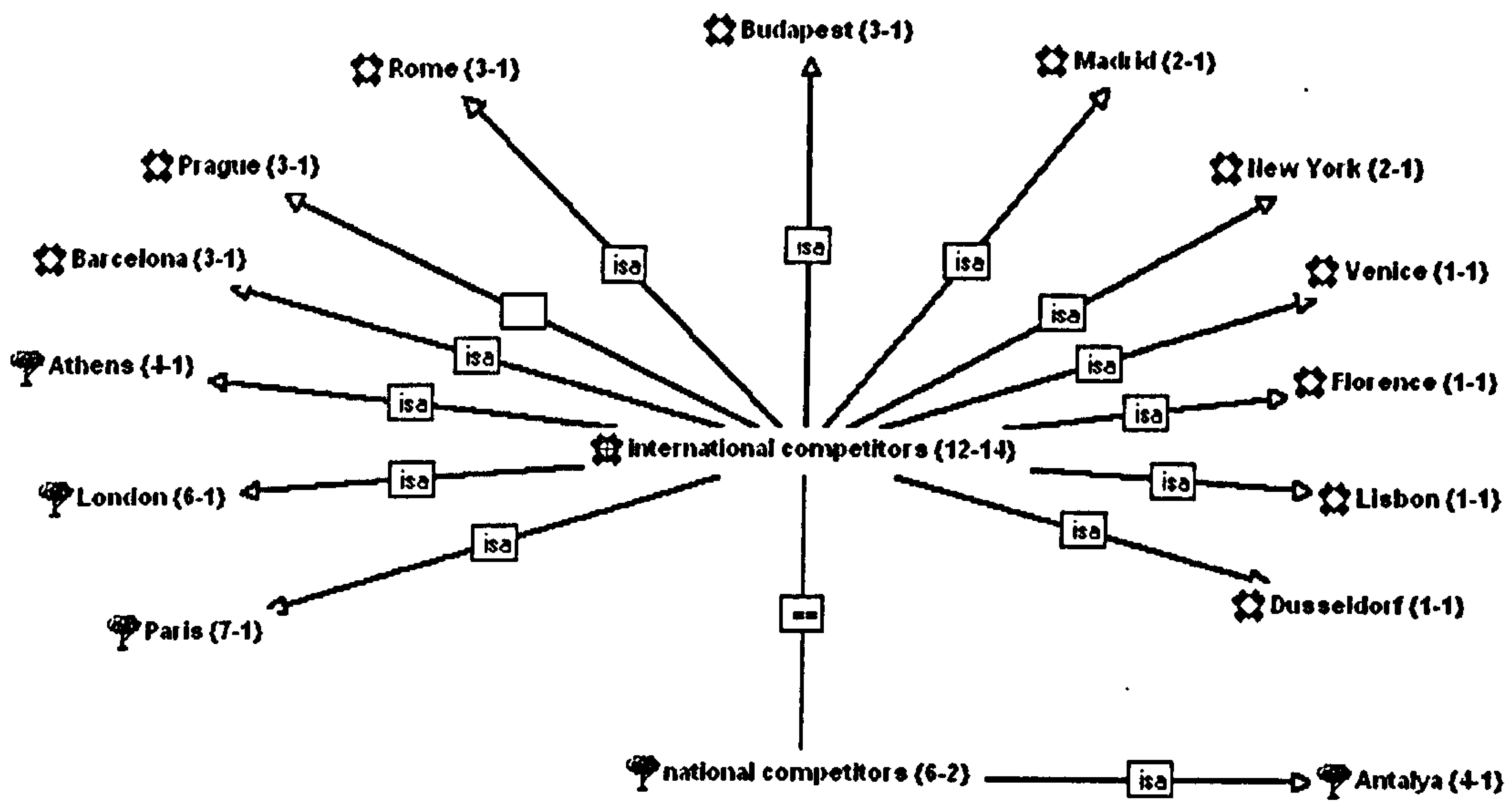
7.3.1.3. Istanbul: Competition of a Developing Destination

As discussed earlier, until very recently, Istanbul had not been emphasised in tourism development plans as a tourist destination by consecutive Turkish governments, who concentrated mostly on traditional holiday resorts and on imaging Turkey as a *'sea-sun-sand'* destination, appealing to North European visitor markets. As a result, Turkey has found itself competing with other Mediterranean countries, especially with Greece and Spain, which offer similar tourist offers. Although marketing efforts have attempted to differentiate the Turkish offer from its competitors through clustering its unique heritage and culture with the expanding tourism sector on the coastal line, the centralised promotional campaigns prevented individual destinations from establishing their own image and identifying their potential market segments. This combined with limited information provided to intermediate organisations has led Istanbul to emerge as a mysterious destination, of which potential visitors have obscure perceptions, and sector stakeholders have opposing views as to which destination category the city belongs to.

Now that the new tourism policy of the Ministry of Culture and Tourism (TCKTB) aims, for the first time, to execute destination-based tourism planning and marketing across the country and that Istanbul has been chosen as the pilot destination, the tourist product of the city is expected to be clearly defined for promotional purposes and in order to determine target market segments. The projects initially proposed by the Ministry to improve the tourism sector, indicate that the main selling points of the city are its history, culture, convention and meeting opportunities and shopping activities (TCKTB, 2004a). Despite recent efforts to enhance the competitiveness of Istanbul in the international arena, the Ministry has not conducted research into the assets of the city in comparison to other cities, which can be considered as competitors.

The characteristic of Istanbul as an exotic but unknown destination is reflected in the research by Grabler (1997b). As mentioned earlier, the survey conducted on potential German and British visitors shows that unfamiliarity with the city results in its geographical competition circle extending from nearby locations such as Budapest and Prague to attractive destinations in visitor generating markets such as Munich and Cologne. Although the city is far away from the traditional holiday resorts in Turkey, the marketing activities pursued in the past have caused Istanbul to be in competition with other leading urban areas in the Mediterranean region including Athens and Barcelona. Most of these cities and various others mentioned by the interviewees imply that the sector stakeholders, too, have difficulty in positioning the city on the international map of competing destinations. As Figure 7.9 illustrates, the code *'international competitors'* was attached to 12 quotations, while 13 different cities ranging from Paris to Dusseldorf were shown as competitors.

Figure 7.9. Competitors of Istanbul



The 12 statements under the code *'international competitors'* pinpoint several key issues regarding the competitiveness of Istanbul as a tourist destination. Firstly, 11 interviewees shared the opinion that Istanbul, given its rich heritage and cultural resources, deserves a better place among European destinations. Furthermore, there were four quotations suggesting that Istanbul embraces all of the required assets to gain a world city status in a superb location between Europe and Asia, providing that its economic, political and cultural wellbeing is enhanced through necessary actions taken by the relevant authorities. Among the reasons why the city has failed to achieve a better competitive advantage, the belated interest of the local authorities and consecutive governments in tourism planning repeatedly arose during the interview analyses - *i.e. 6 quotations-*, while the marketing efforts of private sector organisations were not found effective enough by two interviewees. Finally, one interviewee argued that Istanbul is still in a developing phase and that the variety of products and services appealing to heritage, culture, shopping and convention tourism markets will earn an advantageous position for the city, if marketed, managed and developed efficiently.

Among the cities listed as competitors, Paris and London were mentioned most with 7 and 6 quotations respectively. Although the interviewees showed these cities mostly as *'successors'* rather than *'competitors'* as in the case of Amsterdam, the reasons why Istanbul cannot currently compete with them differed. Probably due its geographical size, location and business centre status, Istanbul was found to be compatible with such world cities as New York and was considered to be their potential competitor in the economic sphere as well as the international tourism arena. The cities either within the same geographical area in Eastern Europe or along the Mediterranean coast followed Paris and London and were listed in the order of reoccurrence as Athens, Barcelona, Prague, Rome, Budapest, Madrid and Lisbon. The interviewees particularly emphasised the successful achievements of Barcelona, Prague and Budapest, and their recent emergence as tourist destinations mainly for short-haul visitor markets. Mentioned only by one interviewee each, Venice and Florence were indicated as competitors owing to their well-known cultural and heritage offers, while Dusseldorf was given as an example, which has improved its convention and meeting facilities to increase the number of business visitor arrivals.

Some of the quotations attached to the code *'international competitors'* include the following:

> *"It is quite difficult to select a few cities as competitors of Istanbul. London and Paris are the first, which come to mind. They obviously have better intangible assets as well-established tourist locations... Maybe it is more sensible to put Istanbul in the same group as Athens and the capitals of Eastern European countries... However, I personally believe that they lack the vibrancy and variety that Istanbul has. For example, their facilities may be enough to attract international conferences. But we have better entertainment and cultural activities for conference delegates to participate in after they are done with their business... Besides, it is the mysterious image which makes Istanbul more attractive than any other destination in Europe" [Istanbul Interview: 2].*

> *"There are five major cities in the world, which are Rome, Paris, London, New York and Istanbul. These cities are important places, because they manage to harmonise history, culture, arts and business within the same urban content... However, when you look at visitor statistics, Istanbul is way out of their league... The only thing we need to do is to promote what we have, and nothing else" [Istanbul Interview: 7].*

In the domestic market, there is arguably no other city, which could substitute what Istanbul offers in its tourist product package. As the cultural, education and business centre of the country, the city is clearly the gateway to Turkey for most visitor markets. However, as indicated in a recent report by the Tourism Journalists and Authors Association (TUYED, 2004), the number of visitors travelling on packaged holiday tours and arriving at local airports nearby coastal resorts has been increasing at a greater rate than the visitor arrivals to Istanbul. Hence, Antalya, a city surrounded by holiday resorts that recently gained an important place in the convention and meeting market, is considered to be the only competitor of Istanbul in the national arena. In order to prevent the two cities from competing to win more visitors in a way to malign each other's tourism sector and image, the TUYED argues that necessary precautions should be taken to urge them to work together toward establishing corporate marketing strategies. To this end, the association suggests that Istanbul and Antalya should run promotion campaigns in each other, while tourism distributors should be encouraged to combine them in the same packages as complementary offers.

Antalya was also the only city shown as a competitor of Istanbul in Turkey by the interviewees. Although the nature of tourism differs remarkably in these cities, the interviewees tended to evaluate the competition in terms of visitor statistics rather than the similarity of target market segments or the comparability of their tourist product packages. In fact, four out of 6 quotations attached to the code *'national competitors'* were about the unique position of Istanbul as the leading metropolitan area of Turkey and its gateway situation to various visitor market segments in the fields ranging from cultural tourism to shopping. While two interviewees called attention to the expanding conference and exhibition facilities of Antalya, which was noted to be benefiting from the emergence of five star hotels serving that particular market outside the holiday season, one interviewee argued that the government initiatives provided to develop mass tourism has put Istanbul in an unusual position and in competition with such holiday resorts:

> *"It is interesting to see that the competitors of Istanbul in Turkey are not other urban areas like Ankara or Izmir. Istanbul is in competition with the holiday resorts. Antalya, for instance, is the major competition. Antalya and Istanbul are the only cities, which have convention and visitor bureaux. From this perspective, the progress that Antalya has made in recent years is praiseworthy. But one cannot ignore the importance of Istanbul as the business centre of Turkey... Besides, Istanbul is in an advantageous location, as it is the only city, where you can find a direct scheduled flight to international destinations. Antalya, on the other hand, only receives charter flights directly. All other connections should be arranged via Istanbul" [Istanbul Interview: 13].*

To conclude the sections on competitiveness, it can be argued that each of the case study cities combine a different set of products and services in their offer and appeal to diverse market segments. While London is the leading urban destination not only in Europe, but also in the world, Amsterdam and Istanbul, as destinations at different phases of their life cycle, face tougher competition than ever before due to several factors, which include an increasing number of destinations investing in tourism development; technological developments making remote locations accessible places; changing characteristics of tourism demand with more free time and holiday alternatives available for potential visitors and; the recent phenomena of collaboration through sector-wide partnerships making tourism management networks cost and time effective in their systematic approach to marketing. Moreover, the interview results indicate that sector stakeholders often evaluate the relative competitiveness of their destination according to three main factors: tourism statistics especially those of overnight staying visitors; successful destinations in the geographical vicinity; the main visitor generating countries and; the competition faced by sub-industries ranging from packaging a better cultural offer to winning special events or international conferences. No matter how confident a destination is of its competitive advantages, it is also evident that its achievement as a *'successor'* in the long-term relies heavily on the relevant authorities' determination and capability to improve the overall package with high-quality products and services, and to market them effectively.

7.3.2. Market Segmentation in the Case Study Cities

Tribe (1997) argues that a strategic plan has certain key features, which are all concerned with looking toward hitting targets and careful and regular scrutinising of such targets. Targets could be associated with all sorts of matters ranging from the development of a certain tourism form to the conservation of natural and cultural resources, which all depend upon the desirable tourism development portrayed by the concerned authorities. No matter what the target is, it is clearly associated with or affected by the attitudes, expectations and characteristics of visitors, both of those wanted and also of those discouraged from visiting the destination.

Therefore, market segmentation and product positioning are imperative and interdependent components of a destination planning and marketing process. In an ideal setting, investigating and determining the target market segments require determination and consistency by decision-makers. Since it is difficult to reverse the unwanted visitor profile in the short-term, strategic decisions on various segments should evolve with consensus established among key players and should envision a lasting success evolving in line with conceivable visitor trends and the expansion objectives of the destination. Monitoring various market segments regularly, identifying new target markets and abandoning ineffective ones demand strategic action taking and readjustment of promotional input, which may be more effective in attracting the revised segments (Grabler et al., 1996).

The very characteristic of urban areas as tourist destinations is the diversity of visitors as well as numerous attractions consisting of their product cluster. In fact, visitors travel to major cities for a wide range of reasons including business meetings, sports tournaments, education, leisure, short breaks and cultural activities. As Law (1996a) notes, there is such a wide range of activities in cities that they do not only provide excitement but a feeling that there will always be plenty of things to do. This also explains the high proportion of repeat visitors in leading urban destinations, as those who could not cover the whole offer in one trip, return to explore other parts and facilities. As a result, while most city destinations prepare and use particular marketing tools with the highest possibility of reaching market segments determined, some even have separate marketing plans for each segment targeted.

In the following sections, the market segments of the case study cities are assessed according to three general criteria, since the limitations of the research inhibits a further detailed analysis. The emphasis is firstly put on the international and domestic markets of each city. Secondly, the geographic segmentation, which mainly takes the *'country-of-origin'* of visitors into account, is evaluated. The importance given to key visitor generator countries in the publications of leading tourism authorities is compared with the findings of the interview analyses. Finally, the interviewee responses on those segments identified according to the purpose of travel is compared with the marketing efforts of the leading authorities to target specific markets. Such data is hoped to provide insight into the positioning of the cities in the international market and the efforts of local authorities to differentiate their tourism offers from those of competitors.

7.3.2.1. International and Domestic Markets

Grabler et al. (1996) argue that the major concern of national and local tourist offices has often been to increase the number of international arrivals, as the relative success of their tourism sector to those of competitors is often measured with the international tourism statistics such as annual foreign exchange earnings. Domestic tourism, meantime, is mostly neglected partly due to the difficulties concerning the measurement and monitoring of domestic visitor flows and also due to the conflicting views of both practitioners and academics on whether or not the impacts of compatriots on a national scale and residents at a local one should be included when analysing the effective utilisation of the tourism sector. The authors further add that some leading tourist authorities still treat domestic tourism promotion as an obligatory task limited with the efforts to discourage citizens from travelling abroad. In urban areas, the situation is more complex, since it is difficult to isolate international and domestic visitors from those local users of tourism and leisure services including both residents and those commuting into cities for work (Page and Hall, 2003).

Tourism income generated by domestic and international tourism also indicate the economic significance of these market segments on destinations and may force decision-makers and marketers to prefer one to another when carrying out promotional campaigns restricted with finite marketing budgets. In London, for instance, the total figure of domestic visitors reached 16.1 million in 2002 in comparison to 11.6 million international visitors in the same year. However, while the international tourism income was nearly £5.6 billion in the same year, the domestic visitor expenditure accounted only for the half of this amount at £2.8 billion (VLL, 2004a). Clearly, there may be several factors causing such a disparity of tourism income including the longer duration of stay by international visitors, who are most likely to use registered accommodation establishments, in comparison to the conceivable trend among domestic visitors to stay with their friends and relatives and to cover a relatively smaller number of attractions and facilities during their shorter trips. Whatever the factors are, they do not justify the negligence of domestic tourism in destination marketing, which, on the contrary, requires special attention by tourism organisations and leading authorities.

In fact, when the combined effects of foot and mouth disease and the 11 September attacks resulted in a decline of 10% and 13% in overall visitor arrivals and expenditures respectively in 2001, the London Tourist Board transferred £500,000 of its marketing budget from international to domestic marketing and launched several advertising campaigns to encourage British travellers to visit the city in 2002. Among the objectives of these campaigns were to increase short-break visits to London from target audiences including city break-takers with higher disposable income; residents in areas geographically distant from London, who therefore require an overnight stay and; meeting planners and conference organisers who book events in London or have the potential to do so. The campaigns called *'Summer in the city'* and *'Royal London: The Queen's Golden Jubilee'* were both carried out in the domestic market and were supported by specially designed websites, newspapers ads, public relation activities and promotional leaflets (LTBCB, 2002).

The most recent tourism plan of London *-i.e. the Mayor's Plan for Tourism in London-* prepared by the London Development Agency (LDA) in consultation with Visit London also emphasises the importance of domestic and international markets and introduces separate actions to be undertaken for the development of these market segments. After acknowledging the fact that the London tourism sector is heavily reliant on international leisure visitor segments, the plan proposes minimising the risk of international dependence of London by niche marketing in overseas markets and the sustainable development of business and domestic tourism. The plan also urges LDA and Visit London to develop new strategies to overcome the traditional dependence through regular analysis of potential markets and launching promotional campaigns in new visitor generator countries (GLA, 2002c).

In line with the Mayor's Plan, the London Tourism Action Plan covering the initial three year period between 2003-06, aims to continue with the development of London's international and domestic promotion both in geographic and sectoral diversification. According to this action plan, the LDA and Visit London has commissioned five-year domestic and international market development plans in collaboration with sector members. The international plan targets new and existing markets; develops promotional campaigns to improve perceptions on value for money and; delivers initiatives to raise the overall quality of London's tourism product and its status as a world class city. Domestic market plan, meantime, is designed to include measures for targeting the domestic market including promotion to local communities and to initiate research to investigate the dynamics of the VFR market (LDA, 2003). Within this overall framework, Visit London has launched its *'Totally London Month'* campaign in May-June 2003, which was later followed by the *'Totally London Tour'*. Totally London Month targeting domestic visitors and Londoners in particular offered special rates to several participating tourism organisations and attractions, and was supported by unlimited bus travel for visitors during consecutive weekends at a fixed rate of £1 (VLL, 2004d).

The interview findings of this research also indicates the growing interest in the domestic visitor markets among the sector stakeholders. As Figure 7.10 illustrates, the codes created for the comparison of international and domestic tourism marketing by sector stakeholders in London were linked to almost an equal number of quotations during the primary data analysis. In fact, since most interviewees mentioned that their organisations run marketing activities at home as well as abroad, some statements were attached to both codes. Among the 15 quotations assembled under the code *'domestic marketing'*, four of them covered such statements acknowledging the need of a balanced approach, when promoting the tourism sector to the UK and international market segments. While 4 interviewees noted that the majority of their customer profile is consisted of the visitors from the UK, six interviewees added that their organisations are directly involved in marketing activities undertaken in the country. The only criticism raised by one of the interviewees was regarding the neglected domestic tourism and its potential in the past.

Figure 7.10. International and Domestic Tourism Marketing of London

As noted above, the 16 quotations of the code *'international marketing'* shared some of the statements with *'domestic marketing'*, as some interviewees pinpointed at the necessity to concentrate on both of these distinct visitor segments. While 5 interviewees mentioned that their organisations carry out promotional campaigns individually in their target overseas markets, 7 interviewees referred to the marketing activities of such organisations like sectoral partnerships, associations and the leading tourism authorities *-i.e. BTA and Visit London-*, which promote their members' products and services abroad on their behalf either individually or as a product package. Examples of these quotations are as follows:

> *"Something like 75% of our visitors comes from the UK. While the overseas visitors are important, when it comes to our marketing spend, we have to look at the most cost-effective way of bringing in new visitors... We are not a commercial organisation with millions of pounds available for marketing. Softest sell is to visitors in the UK" [London Interview: 3].*

> *"What we would like to do is to concentrate more on domestic tourism which has been increasing over the last few years. The recent exchange rates, which have strengthened the pound, cost us some loss of overseas visitors. We are also interested in some new overseas markets which, we think, are potential markets for us" [London Interview: 10].*

> *"We are members of the LTB and the BITOA... They promote themselves to overseas companies coming into the UK. Hopefully they might use the services offered by the members and we are one of these companies that they can use" [London Interview: 5].*

In the case of Amsterdam, the striking development has recently been witnessed as regards to domestic and international tourists accounting for fairly equal shares within the overall overnight staying visitor statistics. As opposed to the stable international market, domestic tourism has gained an impetus in growth and has become the third biggest market for the city in 2000 (VVV, 2000a). In fact, the number of Dutch citizens taking trips in the country increased by 7% in 2001 resulting in nearly 100 million overnight stays in registered accommodation establishments and a total of €2.3 billion spent on holidays. Among the 12 regions of the country, Gelderland and Limburg are the most visited ones with the shares of 16% and 13% respectively. North Holland, where Amsterdam constitutes most of the trips taken within the region, came sixth with a share of 9.1% of all domestically taken trips in the country (CBS, 2002). While the recent tourism trends suggest increasing number of holiday taking in winter months by the citizens, Amsterdam and other urban areas are expected to further benefit from the emerging *'short city break'* fashion among the national visitor markets (CBS, 2004).

Although 90% of over 5 million domestic tourists were day visitors in Amsterdam in 1999, the tourism income generated from the domestic day visitor and overnight staying visitor markets, totalled NLG 3.1 billion in comparison to NLG 3.4 billion generated from international tourism (VVV, 2000c). In 2001, both markets -*i.e. those who spend at least a night in accommodation establishments and day visitors*- rose by 10%. When the VFR market was taken into account with an estimated visitor volume of 2.5 million a year, the overall domestic market of Amsterdam was considered to be at the range of 9 million visitors in 2001. While an average daily expenditure of a Dutch citizen was NGL 127 in the city, the preferred mode of transportation for travelling into Amsterdam was either by trains (44% of all day visitors) or by private cars (44%). The difficulties in parking at inner-city spots was argued to discourage visitors from using their private cars, since the share of passengers arriving by car is much higher in other urban areas -*i.e. the Hague (62%) and Rotterdam (59%)*- (Het Amsterdamse Bureau voor Onderzoek en Statistiek, 2001).

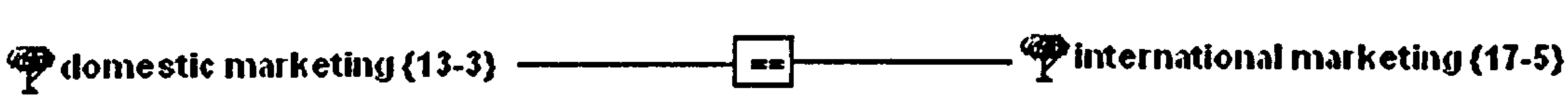
The strategies and actions points of both nation-wide and local tourism development and marketing plans also reflect the importance given to domestic and international tourism by the concerned authorities. As mentioned in Section 7.2.2.1, the Netherlands Board of Tourism and Conventions (NBTC) has sole responsibility for marketing the country to international and domestic markets. The NBTC has been appointed to deliver the action points of the recent policy report titled *'Revised Tourism Agenda' -i.e. Vernieuwde Toeristiche Agenda-*, initiated by the Ministry of Economic Affors (MvEZ). Having emphasised the need to enhance the position of the Netherlands as a tourist destination in both markets, the report embraces a specific action point on investigating the potential of domestic elderly market and identifying their socio-demographic characteristics and holiday decision-making process. The elderly Dutch market is particularly targeted to chose the destinations in the country rather than travelling abroad on holidays (MvEZ, 2003).

On a local scale, the Amsterdam Tourist Board (VVV) continues to build upon a successful *'Amsterdam World City'* campaign specifically launched for the domestic market in 1996 . It is believed that the foundations of the recent outburst of domestic overnight staying visitors were laid by the campaign, which has consisted of editorial tourism publicity via the Dutch media, the publication of an informative calendar called *'365 Tips for a Day in Amsterdam'* and the various leaflets and brochures delivered to hundreds of residential properties in the regions with a high potential to generate visitors. The printed material distributed within the framework of the promotional campaigns *'Amsterdam Arts Adventure'* and *'Amsterdam Winter Adventure'* are also published in Dutch as well as in other major foreign languages for the use of both markets (VVV, 2000a and 2002).

As Amsterdam is the only destination in the Netherlands, where international overnight staying visitors outnumber those domestic ones, the primary data findings on the importance of both markets for the city, presented contrasting views of the interviewees. Figure 7.11 illustrates the codes *'international marketing'* and *'domestic marketing'* linked to 17 and 13 quotations respectively. In fact, five of the 13 statements gathered under the second code were regarding the need to pay greater attention onto domestic tourism by the concerned authorities. While, six interviewees mentioned that their organisations either run marketing activities individually or participate in joint campaigns to promote their services and products to domestic markets, three of them acknowledged the success achieved in the national market by the VVV's campaign *'Amsterdam World City'*. Three interviewees, meantime, stated that Dutch visitors compose the majority of their customer profile. While those targeting citizens on a national scale and residents on a local one added that their primary target market is families with children and elderly people, one interviewee criticised the lack of collaborated efforts among sector stakeholders to nourish domestic overnight staying visitor market:

> *"We want Dutch people to stay in Amsterdam and in the Netherlands. This is the tourism policy of our government, which has been pursued for some years now. Unfortunately they have not been very successful. Because as much attention you pay on overseas tourism should also be paid on domestic tourism. This also requires co-operation. This is what they are aiming now... The importance of domestic tourism is now appreciated by the private sector" [Amsterdam Interview: 1].*

Figure 7.11. International and Domestic Tourism Marketing of Amsterdam



> *"Recently, there has been a campaign to promote Amsterdam to domestic tourism. That was done by a partnership of the VVV and all other local authorities and tourism organisations. They try to attract people over 35 especially from the South of Holland" [Amsterdam Interview: 4].*

> *"Clearly, when we say tourists, it includes people from outside Amsterdam, but Dutch, too. It is a fact that, when local people have some free time, they go outside Amsterdam to benefit from the recreation facilities provided by the beach, for example. Not much of them visit other Dutch cities... The statistics show that there is a large group among the locals who are single, well-educated and high-paid employees. They can be encouraged more to spend their holiday money here" [Amsterdam Interview: 8].*

As Figure 7.11 indicates with more quotations attached to the code *'international marketing'*, the dependence of the tourism sector on international markets is evident in Amsterdam. In fact, five out of the 17 statements were on the importance of tourism income generated through the spending of foreign visitors for the existence of various establishments. Similarly, four interviewees added that the high percentage of their customers is from other countries. While the four organisations represented by the key personnel during the interview conduction were found to carry out their own marketing activities outside the Netherlands, five interviewees confirmed that their organisations co-operate with the NBTC for the activities held abroad, where the NBTC distribute their promotional material in return of membership fees. For international marketing, the joint activities orchestrated by other partnership organisations, such as foundations and associations, are also sponsored by two organisations surveyed for this research. The following quotations summarise such views:

> *"For the Van Gogh museum, something like 60% of the visitors are tourists from other countries... That is why we work very closely with the NBT. They have branches all around the world and help us to promote Amsterdam as a cultural destination" [Amsterdam Interview: 9].*

> *"We are especially interested in international tourism. Locals and domestic visitors do not spend much of their time in Amsterdam. If they come, their visit is mostly on a daily basis " [Amsterdam Interview: 10].*

Among the case study cities, Istanbul is far behind the other two with regard to the domestic aspect of tourism. Since the discovery of tourism as an income generator sector in the 1980s, the development and marketing of Turkey as a tourist destination has always been assessed within the concept of international visitor movement by the concerned public authorities, which have concentrated solely on attracting more foreigners in their tourism policies and plans (*see Section 7.2.3*). There are two possible reasons behind such neglect. Firstly, the characteristics of Turkey as a developing country meant relatively limited purchasing power of its citizens in comparison to the wealthy Westerners. Thus, the budget allocations for the development and marketing of domestic tourism may not have been justified by the capability of national markets in returning the invested amount of public money. Secondly, due to the same reason, only a small number of citizens could afford a holiday abroad, which still results in minimal deficit caused by outbound tourism in the national balance of payments. In other words, the consecutive governments may have taken domestic tourism for granted, as moderate income levels of the Turkish people prevent them from considering holiday alternatives abroad.

In fact, as Seckelmann (2002) discusses, the findings of the Household Tourism Survey carried out by the Ministry of Tourism in 1999, indicated that only 2.9% of all Turkish tourists leave their country, whilst almost half of the remainder travel with the purpose of holiday domestically. The rest consists of those travelling to visit their families and friends. According to the survey, which was conducted with the objective to assess and evaluate the demand side of domestic tourism for the first time in the Ministry's history, 23.6% of Turkish visitors travelling inside the country choose the Marmara region, where Istanbul is located, which was followed by the Aegean region (25%) and the Mediterranean region (20.7%). These results suggest that domestic tourism is almost as concentrated in the coastal areas as international tourism in Turkey.

The author further adds that the potential of domestic tourism has recently been recognised especially by the private sector, as in 2000, 10% of the Turkish travel agencies served the domestic market only (Seckelmann, 2002). The support of the public sector, however, is still required especially in the fields of statistical data collection on national markets in order to monitor trends as well as the introduction of a separate development and marketing plan for domestic tourism. Given the fact that 40% of the overnight staying visitors at Istanbul's accommodation establishments registered by the Ministry of Culture and Tourism were Turkish citizens in 2003, it can be argued that domestic tourism now deserves a thorough analysis (TCKTB, 2004b). Although, it is also true that Turkish guests stay shorter and spend less at these establishments, such recent statistics conflict with the overemphasis on international tourism in governments' policies and plans, and call for the reassessment of the travel behaviour and preferences of the citizens.

Yet, when the recent tourism development plan of the government titled *'The 2010 Tourism Vision of Turkey'* and its short-term action plan covering the period 2004-2006 are examined, one can note that the foremost objectives are still identified from the perspectives of international tourism *-i.e. to increase the total number of foreign staying visitors and; to enhance the competitiveness of Turkey in the international tourism markets-*. Any strategy or any action point on domestic tourism, however, is missing (TCKTB, 2004a). Furthermore, although the plan is prepared on a national scale, it is particularly applicable to Istanbul, which was selected, for the first time, as a pilot destination to activate destination-based marketing strategies by the Ministry. The only organisation, which aims to strengthen domestic business tourism to Istanbul and runs marketing activities to serve this aim, is the Istanbul Convention and Visitors Bureau (ICVB, 1998).

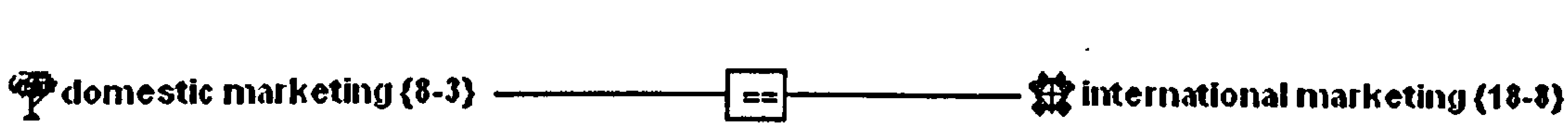
The interview results also pinpoint the imbalance between the two market segments in Istanbul. As Figure 7.12 demonstrates, while the code *'domestic marketing'* was hit only 8 times during the primary data analysis, *'international marketing'*, with 18 quotations, had the highest reoccurrence among the findings of all case study interviews. In line with the strategies of the

ICVB, which seems to be among few organisations recognising the potential of domestic tourism, two interviewees representing those establishments operating in the MICE sector noted that the majority of their customers are Turkish companies organising either national or international conferences and exhibitions in Istanbul. The same interviewees also added that they concentrate most of their marketing activities to target national business firms rather than international ones due to their citizen-dominated customer profiles. Three more interviewees mentioned that their tourism organisations attract as many Turkish visitors as foreigners. The only criticism raised by one interviewee, who complained about the lack of interest in developing and marketing domestic tourism by the public tourism authorities:

> *"We believe that we can benefit more from the potential of domestic tourism. However, the Government should provide some initiatives either in the form of grants or in the form of joint marketing activities, to those organisations, which will operate in the domestic market. In any case, the leadership by the Government is as imperative as the collaboration among different actors of the tourism sector... If a hotel manager says, for example, 'we are fully-booked by a foreign tour company', there is nothing that a local travel agent can do to find rooms for its Turkish visitors" [Istanbul Interview: 12].*

> *"Wherever you go in the world, a conference and convention centre can only attract 10 to 15% of its business from international markets. The rest of the demand is national... This is why we split our marketing department into two divisions: international marketing and domestic marketing. We go to international travel fairs and also get involved in direct sales to major companies in Turkey" [Istanbul Interview: 5].*

Figure 7.12. International and Domestic Tourism Marketing in Istanbul



Among the 18 statements gathered under the code *'international marketing'*, the striking viewpoint emerged in Istanbul was the perception of tourism as an international movement of visitors. In fact, when the interviewees asked to evaluate tourism market segments, three interviewees only referred to those visitors from outside Turkey, while the domestic potential of tourism demand seemed to be overlooked. Moreover, while 7 interviewees representing various stakeholder organisations ranging from museums to hotel establishments mentioned that the large proportion of their customers are foreigners, six organisations were found to conduct their own marketing activities in the leading visitor generator countries. Another four interviewees stated that their organisations co-operate with the TCKTB or sectoral partnerships, such as associations and foundations, for the international marketing of their products and services. Some examples of these quotations are as follows:

> *"We always place the term 'international' in front of our festivals, such as the International Istanbul Theatre Festival or the International Istanbul Photograph Biennial, since we do receive both participating artists and spectators from other countries. For example, the music festival attracted both artists and visitors from 49 different countries in 1997" [Istanbul Interview: 3].*

> *"There has been constant debates on how to develop and market tourism... One way of doing this is to make your destination known in the international arena... Only if you can attract foreigners and encourage them to stay longer and spend more, you can then talk about effective tourism development and marketing" [Istanbul Interview: 8].*

> *"Istanbul has a great potential in the international visitor market. That is why we use every opportunity to promote both our association and our member services in the major visitor generator countries... We also work together with the TCKTB during international travel markets" [Istanbul Interview: 12].*

To conclude, as Wober (1997b) argues, city destinations often report larger shares of foreign visitors in their tourism statistics, as their popularity increases in the international market. Yet, it is often much easier to operate on domestic markets, since it is both cheaper to conduct marketing activities and also more likely to inform potential visitors on the opportunities that a city offers. If the city destination is located in a developed country, where there is not a remarkable difference between the purchasing power of long-stay foreign visitors and short-stay domestic ones, the balance can be achieved through attracting as many tourists as possible from each market. As shown in the case of London, domestic market also has a considerable potential in substituting international ones during crises times. Nevertheless, the cities of the developing world, such as Istanbul, often seem to neglect the economic impact of citizens travelling domestically on the tourism sector, while international arrivals receive greater attention due to the ostensible concerns on increasing tourism income through expenditures made by foreign currencies.

7.3.2.2. Major Visitor Generator Markets

While the previous section serves as an introduction to international and domestic market segments of the case study cities, the geographical segmentation of foreign visitors according to their origin of country is further analysed here. As Page and Hall (2003) stress, geographical segmentation is often used both by researchers and leading tourist authorities to identify the catchment and accessibility of a particular destination offer to various visitor generator countries and the propensity of potential visitors in each of these market segments to prefer the destination in question to its competitors. Such a segmentation method also helps city marketers to determine which markets to target for promotional campaigns abroad, while the analysis of visitor arrival statistics can be used as an indicator to the success of marketing tools used.

It is such an ease of use and measurement, which leads most tourist destinations, either on a national scale or on a local one, to base their marketing effort on a geographical segmentation approach and to allocate their finite budgets according to the attractiveness of the origin countries of existing visitors (Grabler et al., 1996). Unsurprisingly, for most destinations, the major generator markets are the Western countries, where a higher number of affluent citizens with spare time and money available for holiday taking in comparison to those from developing countries, constitutes potential travel demand. As Wober (1997b) pinpoints, the leading visitor generators for the European city destinations were Germany, the United Kingdom, France, the USA, Italy and Spain in 1994. These countries were followed by other prosperous countries including Japan, Sweden, Australia (including New Zealand), Switzerland, the Netherlands, Austria and Canada. The important point to mention here is that tourist destinations should be careful about the degree of dependence on a number of generating markets. Sudden fluctuations of visitor arrivals from a particular country during crisis times may adversely affect the tourism sector if there is a strong reliance on limited segments.

It was such an importance of the US market for London, which has caused considerable cancellations of holidays and decrease in the number of American visitors to the city after the terrorist attacks in New York and Washington on 11th September 2001 (Hopper, 2002). As the most lucrative target market, the proportion of American visitors remained constant at about 19% of all visitors during the 1980s and the early 1990s excluding crisis years (Bull and Church, 1996). By the end of the 20th century, the share increased to about 23%, but dropped to 21% in 2002 (*see Table 7.1.*). Despite the recent efforts of the Visit London (VLL) to turn into business and domestic markets in its promotional effort and to reassess other growing and potential visitor generators, the city's reliance on the US leisure tourism market is still evident (GLA, 2002c).

As Table 7.1 displays, the Western European nations also signify a huge demand potential for the London tourism sector. The agglomerated proportion of these generators within the overall visitor figure is as high as 42%. The accessibility of the city to the Irish market also stands out, as the country comes fourth and ahead of other important visitor generators of the continent such as Italy and Spain. Moreover, Ireland is among those target markets along with the USA, Japan and France, where VLL has recently been actively carrying out or sponsoring promotional campaigns. While the reasons for the selection of the USA and France is seemingly obvious due their high influence in the existing demand portfolio, VLL has also restarted to targeting the Japanese market, which has proved to be growing (VLL, 2003a). Other emerging markets are identified as China mostly in business and education-related travels; Russia and the Middle Eastern countries in leisure tourism and; India with a strong potential on VFR trips (LTBCB/LDA, 2003). In addition to these emerging markets, the marketing strategy of VisitBritain to enter new markets, namely Poland and South Korea, is also significant for London, as the city is considered as a gateway to the country (BTA, 2003).

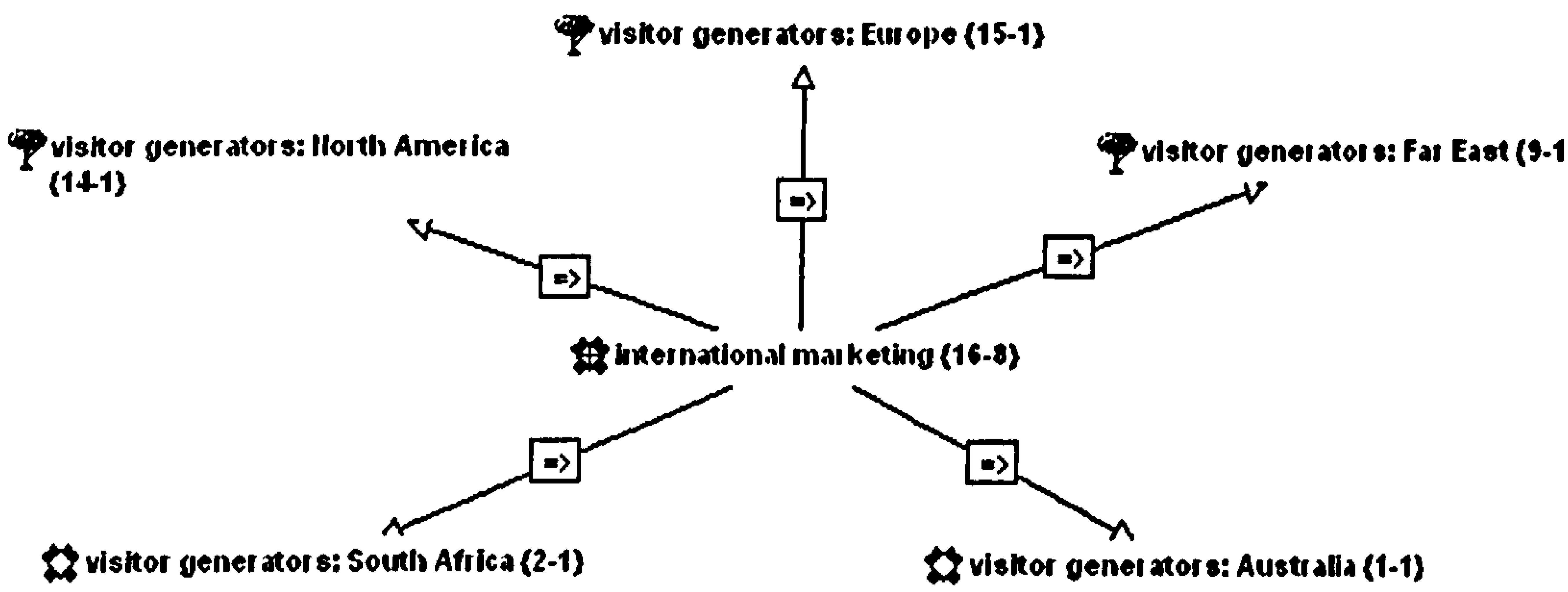
Table 7.1. The Major Visitor Generator Countries for London in 2002

Country of Residence	% of Trips
USA	21
France	10
Germany	8
Irish Republic	5
Italy	5
Netherlands	4
Spain	4
Australia	4
Canada	3
Switzerland	3
Japan	3
Sweden	3
Other Countries	28
Total	100

Source: VLL (2003c).

The analysis of the interview findings does not draw any different picture with regards to the major visitor generators for London. Figure 7.13 illustrates the five continental markets of the city mentioned by the interviewees. Most of the 15 interviewees who mentioned Europe, referred to the Western part of the continent as a single market rather than listing individual countries separately. Among those named specifically, France led the league with 6 referrals and was followed by Germany, which was mentioned by 3 interviewees. Italy and Spain were attributed twice as existing markets, while the Netherlands was brought up only once. Another interviewee emphasised the potential of the Russian and Eastern European markets and their emerging importance for the tourism sector in London.

Figure 7.13. Visitor Generators for London



As in referring to Europe as a single market, North America including the USA and Canada, was also mentioned without specific referral to neither of the countries by some interviewees. However, the number of those, who mentioned the USA as a visitor market, far exceeded the rest of the countries with 11 quotations. The code *'visitor generators: Far East'*, meantime, was attached to 9 quotations, three of which stated Japan, while Taiwan and Korea were mentioned by one interviewee each. Finally, the code *'visitor generators: Australia'* was also covered during the primary data analysis with one quotation only. Overall, the key personnel interviewed for this research seem to have established an anonymous consensus on the fact that the European market is more prone to produce short-break trips, while those long-haul ones, such as the USA and Far East, are potentially more capable of generating long-stay leisure visitors on organised tours. Two of the quotations attached to the codes on visitor generator markets are as follows:

> *"The major market generators for London really fall into three parts. These are North America, West Europe and the rest of the world... There is a weekend-break market from Europe. They come on any Thursday and stay through Sunday. They come by air, train or coach. There is a longer staying market. They tend to come as groups... They come from North America and other long-haul destinations. They stay for four or five days. Sometimes eight or nine days" [London Interview: 8].*

> *"There is a great potential in the North America Market and we focus on that market particularly. If you consider that only small percentage of the American citizens have had travelled abroad so far, its importance for London can be understood more clearly. However, this does not mean that we ignore other market segments. Among all others, the Western European and Japanese markets are included in our marketing activities and the potential*

tourists in these markets are targeted through our promotional campaigns" [London Interview: 1].

London was not the only case study, which felt the crises of 2001. The analysis of the tourism sector in the Netherlands by Euromonitor shows that the number of visitors from the USA fell sharply following the 11 September attacks and did not recover till the end of 2003. Since the market is argued to account for the largest per capita spending in the country, the fall in demand had a remarkable impact on incoming tourism receipts. In the same report, it was also stated that the number of Belgians and Germans visiting the Netherlands increased in 2002. However, the visitors from these neighbouring countries tend to prefer coastal destinations to cities and mostly visit Amsterdam on a daily basis partly due to the relative proximity of the city to the generating markets. In Europe, the most influential market for Amsterdam, however, is the UK, where the city remains as a popular weekend destination especially among young travellers (Euromonitor Plc., 2004). As Table 7.2 shows, despite the effects of worldwide downturn in tourism in 2001, the share of the UK visitors among all overnight staying visitors in registered accommodation establishments raised from 13% in 1991 to 28% in 2001 (Beckers, 1995 and Het Amsterdamse Bureau voor Onderzoek en Statistiek, 2002).

Table 7.2. Overnight Staying Visitors by Country of Origin in Amsterdam in 2001

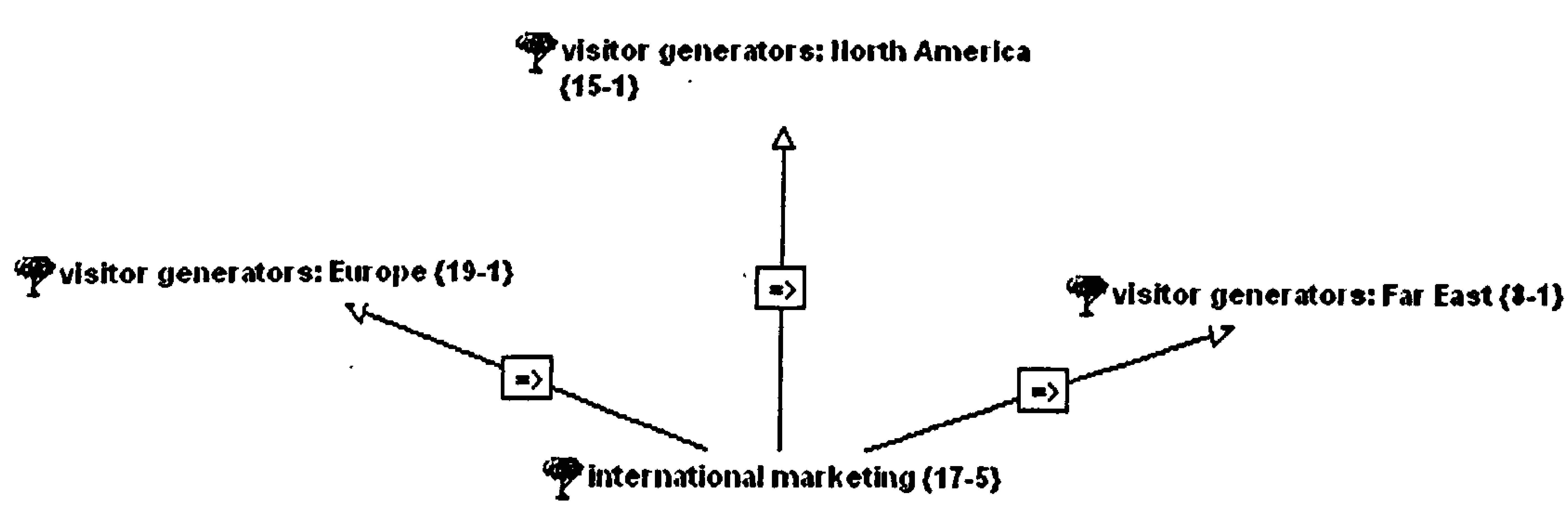
Country of Residence	Visitors in %
United Kingdom	28
USA	20
Germany	6.9
Italy	4.7
France	4.7
Rest of Europe	19.3
Asia	8.7
Rest of America	3.9
Africa and Oceania	3.8
TOTAL	100

Source: Het Amsterdamse Bureau voor Onderzoek en Statistiek, (2002).

In line with such statistics, the Amsterdam Tourist Board (VVV) identified the top ten overnight staying visitor markets in order of importance as the UK, the USA, domestic market, Germany, Italy, France, Spain/Portugal, Scandinavia, Switzerland and Belgium/Luxembourg. While Amsterdam still seems to be dependent on short *'city'* breaks from the neighbouring nations, namely the UK and Germany, Spain was shown as the fastest growing European market with a considerable potential of tourism demand. The consecutive economic crises followed by the impacts of SARS epidemic in 2002, forced the VVV to readdress the visitor characteristics of the Far Eastern countries, where Japan, the other important long-stay visitor market along with the USA, is located. Yet, apart from the top ten countries, the VVV, in co-operation with the Netherlands Board of Tourism and Convention (NBTC), presently focuses its promotional campaigns on attracting Japanese visitors as well as the citizens of so-called other emerging markets including: Poland, Russia, Czech Republic, Austria, and South America (Euromonitor Plc. 2004, VVV, 2000a and MvEZ, 2003).

In spite of its absence from the top ten list, Japan was also mentioned among the major visitor generators of Amsterdam by seven interviewees of this research. The only other Far Eastern country, which was embraced by the code *'visitor generators: Far East'* was South Korea brought up by one interviewee. As Figure 7.14 demonstrates, the dominance of the Western Europe, again often referred as a single entity rather than separate countries by some key personnel interviewed, was reflected in the primary data analysis. Under the code *'visitor generators: Europe'* linked to 19 quotations, the most mentioned country was the UK with 9 referrals, followed by Germany and Italy, which were reoccurred 5 and 4 times respectively. From the emerging markets identified by the VVV, only the potential of Russia to generate feasible tourism demand was recognised by two interviewees, who also enlisted France among the leading European markets. Spain and Belgium were the other countries of the continent to be raised by one interviewee each.

Figure 7.14. Visitor Generators for Amsterdam



Last but not least, the code *'visitor generators: North America'* was connected to 15 quotations. Again, while some interviewees cited the continent as a united market segment, the number of those, who specifically underlined the significance of the USA travellers for the tourism sector in Amsterdam equalled to 9 quotations. In other words, the UK and the USA shared a same number of hits during primary data analysis and were placed at the top of the visitor generator countries list of the interviewees, too. Some important highlights from the interviews include: the increasing day visitors from the UK and Germany; the popularity of Amsterdam especially among young European visitors; and the growing long-stay visitor market from long-haul destinations including Japan and the USA. The following quotations are examples:

"Right now, the UK, the USA, Japan, Germany, France and Italy are the primary markets...Some of these markets are long-distance countries, which have always been the biggest markets for the Netherlands. For instance, if you look at the Far-East market, the growth of the market over the last six years is nearly 50%. It is a booming market" [Amsterdam Interview: 2].

"When you have a limited budget, you cannot do everything. You need to concentrate on the most important markets... That is why we have selected the UK, the States and Japan as our target markets" [Amsterdam Interview: 3].

"I assume that German market is among the biggest markets for Amsterdam. Well, it was ten years ago. The problem with the German market is that they are much more interested in beaches, camp sites and other recreation areas than the historic places of large cities. They do come for shopping. But compared to the long-haul markets like Japan and the United States, they do not spend as much" [Amsterdam Interview: 6].

Unlike London and Amsterdam, it is difficult to comment on the target markets of Istanbul selected for promotional purposes, since they are yet to be specifically identified by the concerned authorities. As previously mentioned, the Ministry of Culture and Tourism (TCKTB) has recently initiated destination-based tourism development and marketing rather than packaging all tourist areas of the country under a single brand *'Turkey'*. Even though Istanbul has been selected as a pilot destination to experiment the new approach in tourism planning, the recently introduced strategic plan titled *'The 2010 Tourism Vision of Turkey'* only embraces such strategies on the improvement of Istanbul's tourism product through expansion and amelioration (TCKTB, 2004). The only organisation, which has announced its target markets for promotional campaigns as North America and Western Europe, is the Istanbul Convention and Visitors Bureau (ICVB, 1998).

Therefore, in terms of marketing, one can only assess the primary visitor markets of Turkey, where the TCKTB has been pursuing marketing activities to nourish potential demand, and assume that the international visitor profile of Istanbul, as the gateway, coarsely resembles the national one. In fact, in most country-wide promotional activities of the TCKTB, the leading visitor attractions of the city are heavily used. The important pitfall of such an assumption is that most of the North European visitors travel directly to seaside resorts along the Mediterranean and Aegean coasts and return to their home without paying a visit to Istanbul. Bearing this adversity in mind, the target markets, on which the TCKTB have been focusing its promotional efforts since 2000, are (TCTB, 2000):

a) Western Europe -*i.e. Germany, Austria, Switzerland, the UK, Ireland, the Netherlands, Belgium, France, Italy, Spain and Portugal-*;
b) Scandinavia -*i.e. Sweden, Denmark, Finland and Norway-*;
c) Eastern Europe -*i.e. Russia, Ukraine, Poland, Czech Republic, Slovakia and Hungary-*;
d) North America -*i.e. the USA and Canada-*;
e) Far East and Oceania -*i.e. Japan, South Korea, Singapore, New Zealand and Australia-*, and;
f) Middle East -*i.e. Jordan, Saudi Arabia, Kuwait, the United Arab Emirates and Israel-*.

When the overnight staying visitor statistics of Istanbul are analysed, it can be seen that some of these markets compose the important visitor generators of the city (*see Table 7.3*). As in London and Amsterdam, the countries of the developed world consist of a significant share among the total, while the United States lead the league with 13.8% of all staying visitors in accommodation establishments. The figures do not suggest overdependence on any single market to an extent that London and Amsterdam have on the US and the UK visitors respectively. The striking difference in comparison to the other case studies, meantime, is the trivial shares of the neighbouring countries -i.e. Greece and Iran. While the on-going conflicts between two governments can arguably be attributed to the uncultivated Greek market, the current political regime practised and the international embargoes on the country are probable reasons behind the relatively small proportion of Iranian visitors. The only market which stands out within the close vicinity of Turkey is the Commonwealth Independent States, of which the importance for the Turkish tourism sector has been steadily increasing since the partition of the Soviet Union.

The abundance of visitor generator markets for Istanbul was also the foremost finding of this research. As Figure 7.15 illustrates, the interview quotations on the subject were scattered between six continental market segments, each of which contains numerous countries mentioned by the interviewees. Among these codes, '*visitor generators: Europe*' embraces both the highest number of quotations -*i.e 10 quotations-* and the highest number of countries mentioned separately -*i.e. 7 countries were indicated either as a potential market or as an existing market by the interviewees-*. When combined with the 12 statements and 6 countries of the Eastern Europe and the Commonwealth Independent States, the continent seems to be greatest source of the international tourism demand to Istanbul from the perspective of the stakeholders represented in this research.

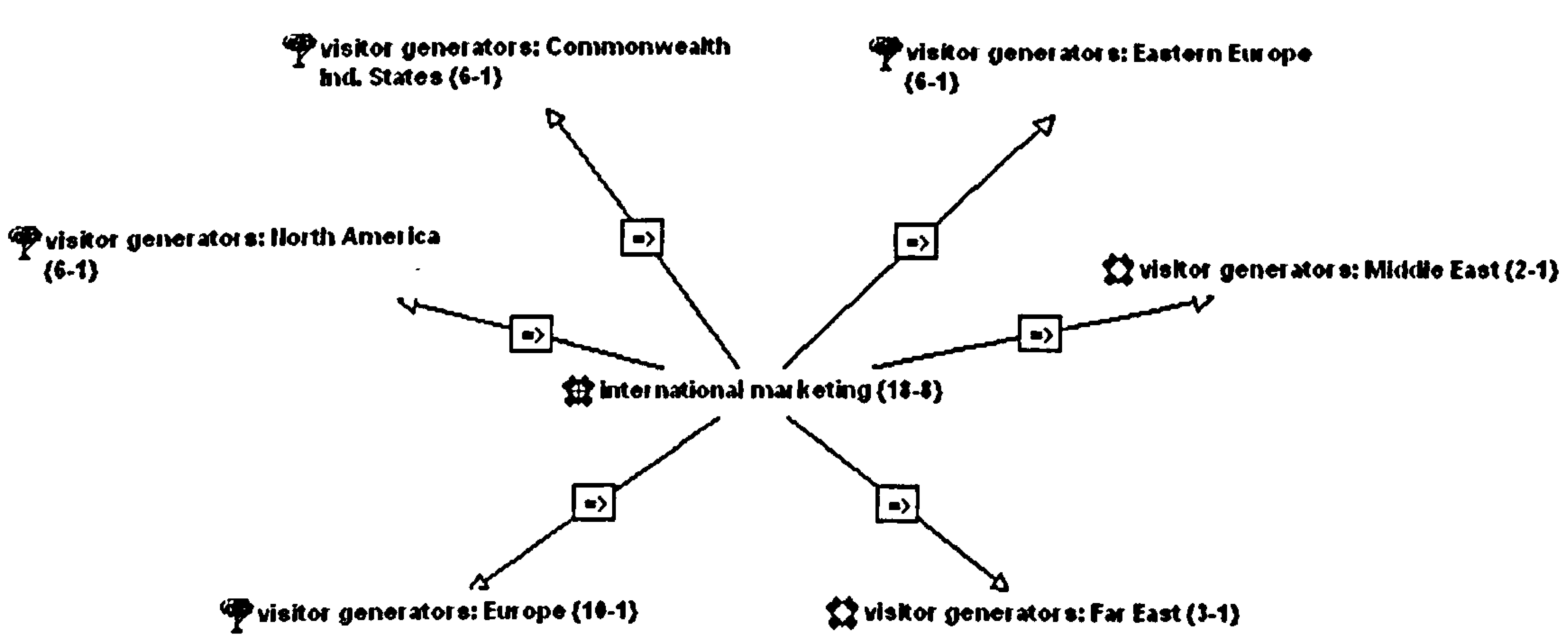
Table 7.3. Overnight Staying Visitors by Country of Origin in Istanbul in 1999*

Country of Residence	Visitors in %
USA	13.8
Commonwealth Ind. States**	11.2
Germany	10.2
France	7.2
United Kingdom	5.9
Japan	5.6
Italy	3.3
Benelux***	3.1
Spain	2.6
Scandinavia****	1.6
Switzerland	1.4
Romania	1.2
Iran	1.1
Austria	1.0
Greece	1.0
Rest of World	29.8
TOTAL	100

* The data only covers the accommodation establishments registered by the Ministry of Culture and Tourism.
** Azerbaijan, Belarus, Armenia, Georgia, Kazakhstan, Kyrgyzstan, Rep. Moldova, Uzbekistan, Russian Federation, Turkmenistan and Ukraine.
*** Belgium, the Netherlands and Luxembourg.
**** Sweden, Norway, Denmark and Finland.

Source: TBYGM (2000a).

Figure 7.15. Visitor Generators for Istanbul



While Germany was referred most by 6 interviewees, it was followed by the UK, France and Italy with 5, 3 and 2 statements respectively. In the Eastern part of the continent, Russia led with 3 hits followed by Romania, which was brought up by two interviewees. The other European countries emerged from the primary data analysis, include Hungary, Czech Republic, Bulgaria, Poland, Spain, Switzerland and Austria with one quotation each. In the long-haul market, North America shared a same number of comments as the Eastern Europe and the Commonwealth Independent States -*i.e 6 quotations*-, while Far East was raised by three interviewees. All of the six quotations under the code *'visitor generators: North America'* pinpointed the importance of the US visitors for the tourism sector in Istanbul, while the number of statements on the Japanese market equalled to two. Finally, two quotations were linked to the code *'visitor generators: Middle East'*, where Israel, reoccurred twice, was shown as a potential generator.

Some of the quotations attached to codes on visitor generators are as follows:

> *"If you take it from the special events point of view, the most important market for the cultural festivals organised in Istanbul is Americans. Clearly you need to take into the account the fact that those visitors interested in cultural events are educated and from high-income earner groups" [Istanbul Interview: 3].*

> *"Visitors are from all sorts of countries. But the majority is from the USA, the UK and Germany... In Europe, France and Italy are other important countries, from where we receive visitors" [Istanbul Interview: 5].*

> *"Especially after the Gulf Crisis, the tourism sector has learned not to rely on the European market too much. Sudden decreases in visitor arrivals and last minute cancellations have damaged the sector. Today, there are more travel agents dealing with the Eastern European market than few years ago. Similarly, the number of travel agents working in co-operation with the Far Eastern tour operators is increasing too... However, one needs to admit that the UK, Germany and France are still the target markets for most tourism businesses in Istanbul" [Istanbul Interview: 4].*

To sum up, the analysis of the case study cities' visitor profiles from the perspective of geographic segmentation, indicates the evident influence of the wealthy nations in generating potential demand. As discussed above, the visitors from the USA and the Western Europe were at the top of the major market segments' list in all cases albeit with differences in order of importance. Geographical vicinity to major generator markets is also found as an important factor affecting the visitor origins of tourist destinations. While London and Amsterdam seem to benefit from their location in West Europe surrounded by other members of the developed world, the neighbouring countries of Turkey, especially at the Eastern border, are yet to produce a notable demand potential. Nevertheless, the proximity of the country to Russia and the Eastern European countries has been reflected in increasing visitor numbers from these regions. Although the distribution of visitors according to the generator markets portrays a relatively balanced picture in Istanbul compared to US-dependent London and UK-dependent Amsterdam, the need to analyse the characteristics of each market segment and to identify target markets for promotional purposes is yet to be fulfilled by the concerned authorities.

7.3.2.3. Market Segments According to the Purpose of Travel

It is often difficult to classify urban areas according to their appeal motivating a visit among potential visitors. As Page and Hall (2003) note, a tourist city may embrace attractions and resources to qualify as a historic, cultural, business, sport, entertainment and leisure shopping destination. The multifunctional use of urban destinations means that visitors travelling with any purpose benefit from combining various aspects within the same holiday package. Although this characteristic of cities complicates any attempt to develop a rigid typology of urban visitors, the authors pinpoint at the principal *'pull factors'* of urban destinations highlighted by the existing literature. These factors include visits to friends and relatives; business; conferences and exhibitions; education; culture and heritage; religion (pilgrims); hallmark events; entertainment and leisure shopping.

Despite such difficulties, market segmentation according to the purpose of travel is often practised by tourism authorities for two main reasons. First, the principal motive shaping the decision making of a potential visitor helps the concerned authorities select particular qualities and aspects of a destination to be used in marketing activities. The destination can increase the effectiveness of its promotional efforts through concentrating on a set of products and services appealing to distinctive market segments. In fact, the publication of a number of leaflets on culture, heritage, shopping and entertainment opportunities is a prevalent example to such an approach.

Secondly, the main motive for travelling among existing visitors is often investigated to measure the economic impact of tourism in localities and the seasonality of tourism movement in the area. For instance, as Law (2002) argues, business travellers account for an important proportion of demand to most city destinations and spend higher then leisure travellers. The visitor profile of a city, therefore, provide tourism developers and marketers with an opportunity to adjust their offers to attract high-spenders providing their offer meets the needs and wants of target groups and to discourage those unwanted ones from travelling to their destination. The modifications to visitor profiles can also be achieved through spreading dissimilar segments to a year in order to mitigate seasonal concentration and to establish balanced tourism income throughout the year.

7.3.2.3.1. London: Diversity in Demand

Having mentioned the importance of the main motive of visit in market segmentation, the uniform approach in city destinations is to split visitors into two main groups: business and leisure visitors. The evident indicator of the special efforts channelled into developing and marketing business tourism is either the establishment of separate convention and visitor bureaux or the creation of a department solely responsible for this particular aspect of the sector within leading tourism authorities. In the case of London, for example, a special division of Visit London (VLL), named Visit London Business and Conventions, was created from the modification of the London Convention Bureau in 2003 and provides the official convention bureau services for the business market. These services include advice and enquiry services to conference organisers, familiarisation trips, site inspections, bid proposal development and, promotion of business tourism facilities and products (VLL, 2003a; www.visitlondon.com/business accessed on 4 January 2005).

Moreover, as discussed in Section 7.2.1.3, the recent tourism plan prepared by the London Development Agency (LDA) on behalf of the Greater London Authority (GLA) addresses the importance of business tourism in the sections concerning product development and initiates a separate business tourism development and marketing plan to be contrived through co-operation with the key stakeholders and the VLL. The key issues underlined in the report titled *'London Leadership Forum on Business Tourism'* includes: to overcome a long lasting problem of the city due to lack of capacity in the conference and exhibition sector; to assess proposals of a new international convention centre; to provide additional funding for the joint marketing of conference and convention facilities and; to concentrate on key business tourism generator markets, namely the US and European markets (LTBCB/LDA, 2003).

As Table 7.4 demonstrates, the main reasons for visiting London are, therefore, determined as holiday, business and visits to friends and relatives (VFR). More than 42% of all international visitors were on holidays in 2003, while the domestic holiday market accounted for almost half of the overall trips made by the UK visitors to the city in 2002. Although around 24% of both domestic and overseas trips were made for business, their contribution to the overall spending figures were 36% and 31% respectively. The striking finding of the 2002 surveys is the diminishing domestic VFR market in London, which dropped from 33% in 1992 to 23% in 2002 (Bull and Church, 1996). The share of 24% was achieved in the international VFR market. The contribution of the VFR markets to the overall domestic and international tourism income levelled at modest shares of 12% and 17% respectively for explicable reasons.

The declining share of the VFR visitors was acknowledged in *'London Tourism Action Plan 2003/4-2005/6'*, which attempts to develop this specific market segment through introducing new research methods and techniques to investigate the visitors travelling to visit their friends and relatives in the city; developing a promotional campaign to target the VFR market directly; educating Londoners in the variety of tourism activities and; identifying opportunities for niche marketing in relation to a number of diverse ethnic products such as the Chinese New Year (LDA, 2003).

Table 7.4. Main Reasons for Visiting London

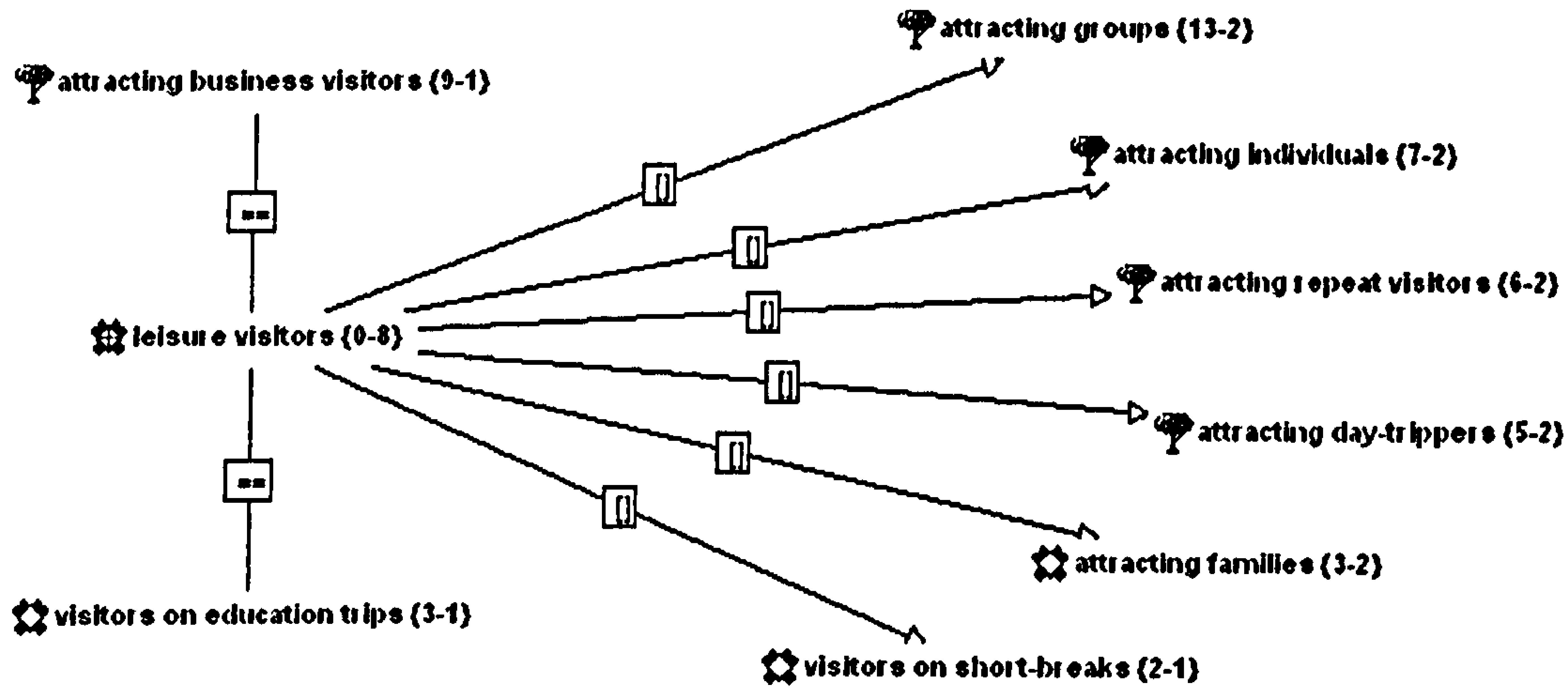
	UK Visitors (2002)		International Visitors (2003)	
	Trips (Millions)	Spending (£ Millions)	Visits (Millions)	Spending (£ Millions)
Holiday	7.9	1,415	4.95	2,133
Business	3.9	1,004	2.73	1,816
VFR	3.8	350	2.80	1,009
Other	0.5	49	1.21	912
TOTAL	16.1	2,818	11.69	5,870

Source: VLL, 2003c and Office for National Statistics, 2004.

When the tourism plans of the GLA and LDA and, promotional publications of the VLL examined, it can be argued that visitors on leisure trips are targeted with several key themes associated with the components of London's tourism product. These themes are shopping facilities, sports activities, festivals, cultural events, heritage, and entertainment opportunities and provide insight into the main purpose of visit among both existing and potential segments. The publications such as *'Where to Eat in London'*, *'Entertainment and Leisure in London'*, *'What's New in London'* and *'The Essential London Shopping Guide'* are continuously updated and printed by the VLL and, distributed via tourism information centres and participating organisations. For sports events, the Wimbledon tennis tournament, rugby and cricket international championships are particularly argued to add to London's tourist draw. Such an appeal in sports tourism is further challenged with the city's bid to host the 2012 Olympic Games (VLL, 2003a; GLA, 2002c). Finally, the VLL has also developed an education project titled *'Kids Love London'*, which aims, firstly, at linking London schoolchildren with the capital's cultural attractions and also reaching other children from the UK and overseas through an online guide created on the web (LTBCB, 2002; www.kidslovelondon accessed on 4 January 2005).

Some of the codes used when analysing the interview findings on the strong aspects of London's tourist product, also relate to the main purpose of visit to the city envisaged by the key tourism personnel contacted during the primary data collection. As discussed in Chapter 6, these findings resulted in the creation of codes *'arts, culture and entertainment'*; *'heritage'*; *'diversity'*; *'shopping'* and; *'special events'*, each of which is considered to have a notable *'pull in'* effect on visitors to London. One can argue that such characteristics of a tourist product are often associated with leisure tourism. This is why, in this section, the attention is paid into the identification of other purpose-based market segments with more detailed approach to the travel habits and preferences of leisure visitors. In the case of London, 10 and 4 quotations on those visitors travelling for business and education purposes were attached to the codes *'attracting business visitors'* and *'visitors on education trips'* respectively, while leisure visitors were split into groups of individual travellers; those on packaged tours; families; short-break visitors; day visitors and; repeat visitors (*see Figure 7.16*).

Figure 7.16. Market Segments of London According to the Purpose of Visit



It is important to note here that the statements on these market segments combine both the comments and opinions of the interviewees on the leading visitor markets to London as a whole and also the segments targeted by their individual organisations. Overall, the results match the official documents and marketing plans stating that visitors come to London for various purposes. Among the leisure visitors, those travelling on packaged tours mentioned most with 13 quotations. The code *'attracting groups'* was linked to the quotations mainly revolving around the importance of tour operators and travel agents bringing incoming tours; the dominance of long-haul markets in packaged tour demand; the use of London as a base to other UK destinations and; the relatively longer staying period of the leisure visitors on packaged holidays in comparison to those individual travellers. Two interviewees specifically named the US and Japanese markets and the tendency of visitors from these generator countries to prefer to be in groups on holidays:

> *"I think it will be very long time before the North Americans start coming individually. They like the security of the package and being booked through a tour operator, particularly if they are elderly pensioners who do not want all that hassle. Basically, these are the people who do not have enough time to research. Relatively experienced people may want to do the research before*

they travel, and there is a quite possibility of that happening in Europe. But it is less likely for those who are travelling from the Far East... They do not even choose to go around on their own within their limited free-time, when they come as a group. They stick together and want to be looked after properly all the time" [London Interview: 9].

The code *'attracting individuals'* was attached to 7 quotations, five of which referred to special interest visitors travelling with specific motives such as shopping, culture or entertainment. Two interviewees also pinpointed at the fact that individual visitors are mostly young travellers from short-haul generator markets. The sheer geographical size of London and the variety of tourist attractions were also argued to foster repeat visits to the city. Among the six quotations linked to the code *'attracting repeat visitors'*, two were regarding those visitors coming at different times for varying purposes or to discover another side of London. The interview findings suggest that the newly revitalised hinterlands of the city, including Docklands and Southbank, particularly target repeat visitors, who are expected to have covered *'must-see'* attractions in their first or second visits. As the following statement suggests, more central attractions were also advised to expand on their offers through adding new products and services to their packages in order to capture repeat visitors' interest, who account for a significant share among the total visitor numbers:

"I think something like 60% of visitors to London have been to London before. So, the market for repeat visits is quite strong. The market to bring people to see something different is good" [London Interview: 2].

Another leisure market, which reoccurred five times during the interview analysis, was the day-visit market to London. The code *'attracting day-trippers'* embraced those statements on domestic visitors and the international ones from neighbouring countries, coming for a day and participating mostly in entertainment, cultural and shopping activities. While the dominance of domestic market in day visits was emphasised by all five interviewees, four of them added that their organisations target this specific market segment. The classification of leisure visitors according to the duration of stay also resulted in the creation of the code *'visitors on short-breaks'* containing two referrals on the weekend market from Europe staying from Thursdays through Sundays. Finally, the code *'attracting families'* was attached to 3 quotations and was considered to indicate London's appeal to visitors travelling with children. In fact, while these three interviewees mentioned that families capture an important proportion of their customer profiles, they said that, if the aim is to attract families, their marketing activities firstly focus on the needs and expectations of children. An example to the quotations attached to these three codes is as follows:

> *"UK visitors tend to be families, while overseas visitors are either couples travelling individually, or groups on scheduled tours... There is also a domestic same-day market. London has a good range of tourist attractions. Someone coming to London for six to eight hours, would often come for a specific purpose. It may be just for shopping, visiting a museum or seeing a West-End show" [London Interview: 6].*

Following the leisure market, the code *'attracting business visitors'* was repeated most during the data analysis with 9 quotations. The comments of the interviewees mainly revolved around the fact that London needs to improve its business tourism product, as these visitors generate higher tourism revenues than any other market segment. While one interviewee argued that London is a popular business destination due to its geographical location between Europe and North America and also to the use of English at international meetings and conferences, 5 interviewees shared the concern that the lack of a high-capacity conference centre results in lost opportunities. In addition to the organisations operating specifically in business tourism, other tourism organisations ranging from shopping centres to cultural establishments were also found to be acknowledging the importance of this segment and to targeting business visitors alongside their primary markets. The only other market segment, which emerged during the interview analysis, was young international visitors coming to London for education purposes. Once again, the worldwide use of English was argued to produce great interest to language schools. The code *'visitors on education trips'* also embraced two statements on international students coming to study university degrees and the educational school tours organised mainly by European countries:

> *"There is a very strong student traffic coming into London. I understand that they stay in student hotels in London or they stay with English families in the outskirts of London. It is a part of their educational programme. That is a very strong and consistent market all through the year" [London Interview: 8].*

> *"(London) is a natural meeting point particularly for American and Asian investors. They really regard London as a gateway to Europe. It may surprise other Europeans, because they may say that the main land of Europe is the most important. But, we have a strong advantage of being in between different time zones. Any business can deal with Asians in the morning, and with Americans later during the day. Another important factor is the English language" [London Interview: 14].*

> *"Business market is huge. You get incentive tours. There are people coming for their business meetings. There are also conferences and exhibitions...*

They may be coming to London for a conference, but they also go shopping and dine at nice restaurants. During their stay, they become a part of London's sophisticated life" [London Interview: 9].

7.3.2.3.2. Amsterdam: Shifting from Backpackers to High-spenders

As mentioned in Section 6.3.2, Amsterdam became a popular tourist destination in the 1960s, when young visitors from Europe and North America travelled to this *'tolerant'* city, which is still famous for its policies on sex and drugs today. Often referred to as *'the Mecca for hippies'* in the literature, Amsterdam has gained an image as a place for backpackers, initially influenced by the characteristics of demand in the early involvement years (Dahles 1998; Ashworth and Tunbridge, 2000). Since the 1980s, the city has been suffering from this negative image and its evident symptom of decreasing visitor numbers. The local authorities focusing more on culture and heritage than coffee shops and the Red Light District in their promotional efforts, have been trying to reinforce the tourist offer with the aim of attracting higher-spending and longer-staying visitors than adventurous, but poor youth. As clearly stated in the most recent strategic plan, the Amsterdam Tourist Board (VVV) now concentrates on three key aspects: cultural tourism; quality of tourism products and services and; segmenting the market into dissimilar demographic groups so that the risk of overemphasis in one market is eliminated (VVV, 2000a).

While the VVV identifies the strong aspects of Amsterdam's leisure offer as its heritage with unique architecture along the canals, shopping, cultural and arts activities and, its accessibility to major generating markets (VVV, 2000a), the organisation also works co-operatively with the City of Amsterdam (CoA), which has published a cultural policy to reinforce the city's competitiveness as a cultural centre in the international arena (*see Section 7.2.2.3*) (CoA, 2003a). Although the interview findings on the strengths of Amsterdam supports the vision of the local authorities to expand the visitor profile to include educated tourists coming to experience culture, heritage and arts, the code *'tolerance'* still denotes the importance of the well-known *'sex and drugs'* component of the overall offer and its influence on the characteristics and decision-making process of leisure travellers to the city. In the order of reoccurrence, the codes *'arts, culture and entertainment'*, *'tolerance'*, *'heritage'*, *'special events'* and *'shopping'* can be arguably associated with the pull-in factors of Amsterdam, where the museums of Rembrandt and Van Gogh are presented in the same *'compact-city'* package with the Red Light District.

In addition to targeting more middle-aged, well-educated and wealthier tourists, whose main motive of travel is culture and arts, the VVV and other responsible authorities have also turned to develop cruise tourism to balance the dominant short-stay young visitors market (Dahles, 1998). To this aim, the Amsterdam Harbour was revitalised and the New Cruise Passenger

Terminal was opened in 2000. In the first year of the terminal's opening, the arrival of cruise ships was said to increase by 10%, while the number of cruise passengers rose by 18% in comparison to 1999, bringing the total figure to 174,000 passengers in 2000 (Het Amsterdamse Bureau voor Onderzoek an Stastiek, 2001). The initial success of the terminal has led the VVV to differentiate cruise passengers in purpose-oriented segmentation from other target markets, namely leisure break, business and day visitor markets, and to develop and run specially designed marketing activities for this specific segment (VVV, 2000a).

Despite the opposition from the local community and the CoA, the VVV also run a marketing campaign in the US highlighting *'Amsterdam: the Gay Capital of the World'* in the early 1990s. Although the campaign was found successful in raising the *'visibility'* of Amsterdam as a place welcoming people with different sexual preferences, the VVV stopped the campaign as the tourism sector did not universally favour the idea of being promoted as a gay destination and was concerned about families and other conservative groups being discouraged from visiting the city (Dahles, 1998; Hughes, 1998). Yet, Hughes argues that Amsterdam continues to be popular among gay visitors and will continue to attract gay tourists mainly from Europe and North America. The emergence of distinctive gay leisure clusters containing cafes, bars and discos and the increasing amount of gay tourism income are shown as notable indicators of the growth. Nevertheless, as in any other sex-based tourism activity, this particular segment is now overlooked in promotional campaigns and marketing is limited to the publication of *'gay guides'*.

Business tourism, which the Amsterdam Convention Bureau aims to develop and promote, is the second biggest segment for Amsterdam following leisure market. As Table 7.5 illustrates, 32% of overnight staying domestic visitors and 27% of those international ones arrived in Amsterdam for business purposes in 2003. These figures cover those visitors on individual business trips, incentive groups and the MICE market. Although the table suggests that every one out of three visitors comes to Amsterdam for business purposes, the city has recently fallen behind its international competitors in the top MICE destinations league. In terms of the number of international conferences and exhibitions held, Amsterdam dropped from the 7th place in 1999 to the 20th in 2003 (VVV, 2004a). Similarly, the share of the VFR segment is nowhere near what London achieves in this market, whereas the dominance of leisure tourism is apparent with 59% and 64% of domestic and international leisure travellers in 2003 respectively.

Table 7.5. Main Reasons for Visiting Amsterdam

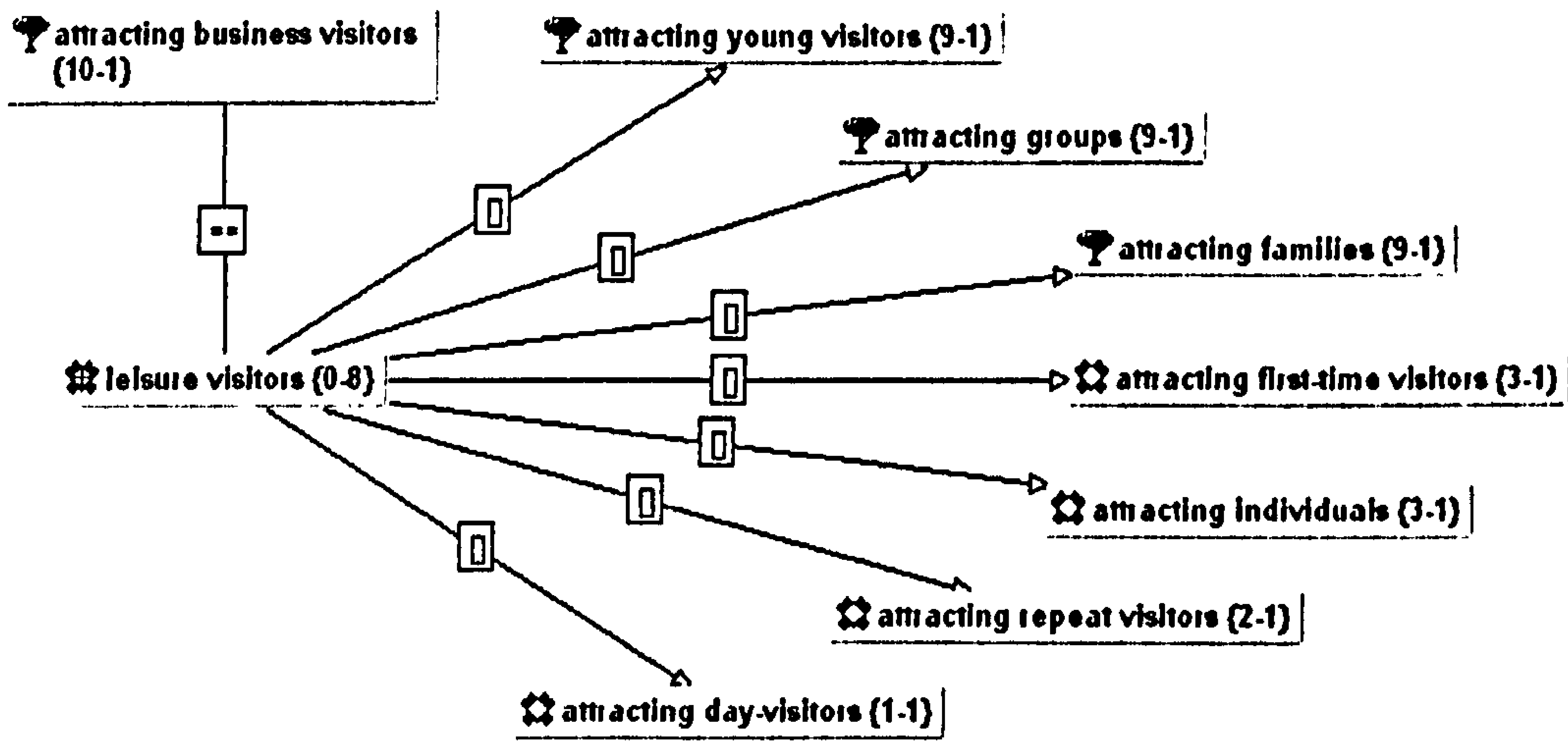
	Domestic Visitors (2003)		International Visitors (2003)	
	Day Visitors (%)	Overnight Visitors (%)	Day Visits (%)	Overnight Visitors (%)
Holiday	54	59	65	64
Business	35	32	29	27
VFR	8	6	5	3
Other	3	3	3	4
TOTAL	100	100	100	100

Source: VVV 2004b.

The over dependence on young leisure visitors in tourism demand was also raised by the interviewees of this research. Figure 7.17 embraces the two main codes namely *'attracting business visitors'* and *'leisure visitors'*, the last being split into 7 subcategories. Among these, the code *'attracting young visitors'* shares the same number of quotations *-i.e. 9 quotations-* as the codes *'attracting groups'* and *'attracting families'*, which together lead the league of purpose-based market segments. 6 out of 9 statements on young travellers were regarding the remarkable influence of this specific market on the visitor profile of Amsterdam. Acknowledging the well-established image of the city as a fun and exciting destination for single adults at the age group of 18-30, three interviews raised concerns on the need to alter the existing market portfolio mainly due to the mediocre tourism income generated from this market, which often searches for cheap accommodation and transport opportunities suiting their limited holiday budget. The contradictory remark was also made by one interviewee, who argued that the local authorities should become more appreciative of the image of Amsterdam as a young people's place, and take actions to nourish this segment rather than ignoring it all together:

> *"Amsterdam has this image as a fun place for young people. (The local authorities) take this aspect for granted. They ignore the image of sex and drugs. They think that, by just ignoring it, they can get rid off it. I think that is wrong... I mean, drugs and sex are nothing to be afraid of... Otherwise we would change our local policies and become more conservative on these matters... We practise liberal policies locally, but do not want other countries to know about them. They know it... It could probably have been better, if the authorities had sold the place by using drugs in their advertisements and trying to attract more young people. Because, their attempts to promote culture and arts seem to have failed" [Amsterdam Interview: 8].*

Figure 7.17. Market Segments of Amsterdam According to the Purpose of Visit



The comments of the interviewees on packaged tour visitors varied and were gathered under the code *'attracting groups'*. Three interviewees said that they are aware of the VVV's marketing efforts focusing on culture and arts in order to attract groups, but were not sure whether such efforts would be successful or not given the city's popularity among young travellers and its unsafe image. Four interviewees, on the other hand, shared the opinion that the sufficient cultural and heritage attractions of Amsterdam appeals to visitors brought by incoming tours. An average tour visitor being wealthier, more educated and more interested in culture than young travellers was implied by one interview, while three out of 9 quotations contained expressions about the need to increase the number of visitors on packaged tours. The quotations linked to the code *'attracting families'* present similar findings. Three interviewees, including the representatives of the local tourism board and the municipality, mentioned the recent attempts to attract families with children and to reinforce the city's image as a safe destination. Nevertheless, the rest of the 9 quotations attached to the code pinpointed at the hesitation of especially international visitors to come as families, although possible achievement in such goals were acknowledged to be beneficiary for the tourism sector by these interviewees. Examples of these quotations are as follows:

> *"The (VVV) now tries to target people over 35 years old. They want families in Amsterdam. But, families do not come here. They think Amsterdam is not safe and clean for children. People above 50 think even worse. They think of Amsterdam as a criminals' place". [Amsterdam Interview: 4].*

> *"It is a fact that Amsterdam is perceived as a young people's place and that they come here for fun. I think that is bit exaggerated. There are also families*

and couples coming from Europe. We get tours from the US, too. They spend a lot more than young people do" [Amsterdam Interview: 9].

The other two codes titled *'attracting first-time visitors'* and *'attracting repeat visitors'* were associated with the frequency of leisure visits to Amsterdam and were attached to 3 and 2 quotations respectively. The city, where 40% of leisure visitors and 68% of business ones were repeat visitors in 2003, is argued to be perceived differently by potential and existing markets (VVV, 2004a). The interview findings support this view and indicate that the pre-arrival *'unsafe'* perception of the city among international visitors is often replaced with the after-stay *'cultural'* and *'friendly'* image. One interviewee also suggested that the country benefits from the gateway position of Amsterdam, since repeat visitors tend to use the city as a base and take part in daily excursions not only to its surroundings, but also to other cities like the Hague and Rotterdam:

"Everybody feels at home here. But you only experience this once you come to Amsterdam. Prior to travel, visitors have that perception that Amsterdam is not safe, but chaotic. That is something hard to influence. But the ones who decide to come here, go back with somehow changed perception, attitude and image of Amsterdam" [Amsterdam Interview: 14].

In Amsterdam, the day-visitor market was not mentioned as much as it was during the London interviews. The only statement of the code *'attracting day-visitors'* was about the potential of the neighbouring countries and domestic market to generate day trips to Amsterdam. Considering that Amsterdam is a compact city within the continental Europe, it would be expected to have a greater appeal for same day trips than London. In fact, over 5.3 million day visitors were recorded in 1999, 90% of which was composed by the domestic market (VVV, 2000c). The research finding that the key personnel interviewed in Amsterdam disregard this market, may be explained with the majority of day-trippers being Dutch visitors and the misconception of limited tourism revenue generated by this segment. The code *'attracting individuals'*, meantime, consisted of three quotations referring to other segments than the young visitor market and covered such views that Amsterdam appeals to special interest groups travelling with specific motives such as shopping and arts events:

"There are individual visitors coming to Amsterdam just for shopping. Some are Dutch citizens from the other parts of the country and do their high-street shopping here. Some foreigners are antique collectors. Some come for diamonds. These are upmarket visitors to Amsterdam...There are also art-lovers, who visit galleries and exhibitions" [Amsterdam Interview: 10].

Finally, the code *'attracting business visitors'* was attached to 10 quotations, two of which were sceptical about the competitiveness of Amsterdam as a business destination. These interviewees argued that the city lags behind not only its international competitors, but also some other Dutch cities like Rotterdam in business tourism. On the contrary, three interviewees shared the view that Amsterdam has the right components to attract international conferences and exhibitions, while four interviewees including the representatives of the Amsterdam Convention Bureau and the RAI Conference Centre, stated that business visitors are among their primary target markets. One interviewee also cited the adequate foreign language skills of tourism staff as an advantage of Amsterdam in the MICE market. Most of these interviewees favoured the development of business tourism on the grounds of its potential to generate higher economic benefits for the whole sector than other tourism forms. The following quotations cover some of these views:

> *"Surveys show that about 25% of visitors come to Amsterdam with the purpose of attending a meeting or a congress. So, there is a good potential of business tourism... International delegates go to the RAI and attend their conferences. But, there is not much to do there. So, they go to the city centre for shopping or to visit a museum" [Amsterdam Interview: 15].*

> *"There are groups and business visitors coming to the city. However, it is not as much as other cities attract... If you lose a conference to, let us say, Rotterdam, then you lose money. Business visitors are not like holidaymakers, who would not return home without paying a visit to Amsterdam. Their visit is constrained by heavy schedules. They stay longer and spend more money, but they do not necessarily move around the country" [Amsterdam Interview: 13].*

7.3.2.3.3. Istanbul: Undifferentiated Segmentation in Marketing

In the 1990s, the national tourism policy of Turkey was to move forward from the rapid growth of mass tourism of the 1980s to special interest tourism so that the economic benefits of the sector could be spread from the coastal resorts to across the country. The strong aspects of Turkey, such as heritage, nature and climate, were matched with the main motives of then potential and existing visitors, and tourism development was projected in such forms as religious tourism, yacht tourism, business tourism, the Silk Road project -*i.e. heritage tourism*-, spa tourism and ecotourism. Although most of these projects were designed on a national scale, their actions required upgrading and building of tourism supra-structure in selected destinations. The renovation and restoration of heritage attractions and the provision of low-interest loans for the establishment of purpose-built complexes were intended in the destinations, which were expected to become en-route components of the regionally *'themed'* product packages (TCTB, 1997). As the gateway to the country, Istanbul was included in several projects concerning heritage tourism, business tourism and religious tourism (TBYGM, 1998).

This centralised approach to tourism development is often criticised for not considering the needs and expectations of destinations, which required individual plans and policies implemented in co-operation with the sector. As a result, most of the projects have failed to fulfil their expected goals. The failure is also associated with the changing priorities of consecutive governments, hence the inconsistency in budget allocations to tourism development and marketing (Goymen, 2000; Tosun and Jenkins, 1996). The recent tourism plan introduced by the Ministry of Culture and Tourism (TCKTB) aims to overcome the problems caused by centralised policy making and initiates destination-based development plans with the selection of Istanbul as a pilot destination (*see Section 7.2.3*). When the strategies of this new plan covering the period 2004-2010 are examined, it can be argued that the TCKTB puts an emphasis on the business, heritage, culture, sports and cruise tourism markets for Istanbul with such projects including the development of new conference centres; the revitalisation of the Galata Harbour for cruise ships; the support of the city's bidding for the Olympic Games and; the transformation of the Historic Peninsula to a museum quarter (TCKTB, 2004a).

The statistics on the main motive of international visitors indicate that the majority comes to Istanbul for leisure purposes. As Table 7.6 shows, 45% of all overnight-staying international visitors were on holiday in 2001. When the motive of leisure is divided into sub-categories, Istanbul scores high in the heritage, shopping, and cultural visitor markets. According to the TCKTB (2004a), 60% of the leisure market was composed by those holidaymakers, who showed their main purpose of travel as heritage, while shopping and culture accounted for 19% and 15% respectively. With the share of 20% of all staying foreigners, the VFR market follows ahead of the business one. Although there are no detailed statistics on domestic tourism, Seckelman (2002) cites that Turkish citizens travelled to the Marmara Region, where Istanbul is located, mostly for holiday purposes *-i.e. 49%-* and to visit their friends and families *-i.e. 45.8%-* in 1999.

Table 7.6. Main Reasons for Visiting Istanbul

	Overnight-Staying International Visitors in 2001 (%)
Holiday	45.0
Business	16.5
VFR	20.5
Other	18.0
TOTAL	**100.0**

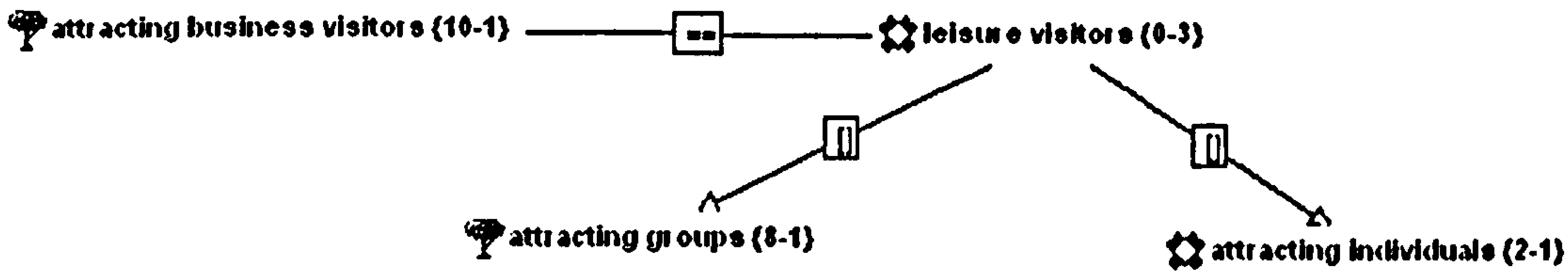
Source: TCKTB, 2002.

Secondary data on the demand characteristics of Istanbul is limited. In her study examining the visitor profiles of four and five-star hotel establishments, Guvener (1997) notes that the recent upsurge of hotel establishments serving the higher end of the market is associated with the increasing importance of the city as a commerce and financial centre in terms of not only national trade transactions, but also international ones. The author adds that most of the hotels examined target primarily businessmen, while leisure visitors are considered as a subsidiary market. When asked about the leading visitor generating countries, the managers named the US, Europe and Japan as their target segments in the international market, whereas Turkish businessmen are also found to account for a notable proportion of high-end hotel demand. Similarly, Caglayan (1995) argues that the overall market mix of Istanbul's accommodation sector is shared equally between the business and leisure markets, the later preferring the establishments at the lower end ranging from budget to two and three star hotels.

As discussed in Section 6.3.1, heritage, culture, shopping activities, warm climate and Turkish cuisine are the strong aspects of Istanbul appealing to potential and existing visitors. When asked about the demand profile of the city, the interviewees referred to such aspects and identified three main market segments: business visitors; groups on packaged tours and; individual travellers (*see Figure 7.18*). Compared to the interview results from the other case studies, the smaller number of segments mentioned by the Istanbul interviewees could be explained with several factors. First, Istanbul had, until very recently, been marketed as a component of the national tourism product by the TCKTB, which is yet to identify the primary constituents of the city's image and brand as a tourist destination. The constant emphasis on heritage and culture in all marketing activities has caused the promotion of the city as a exotic and mysterious holiday destination at the doorstep of Europe. In other words, the Ministry has been adopting the method of undifferentiated segmentation in its marketing efforts. Instead of promotional campaigns prepared according to the needs and expectations of individual target segments, the universal and stereotype messages have been distributed to all markets. The Istanbul Convention and Visitors Bureau (ICVB) established in 1997, aims to overcome this problem through specialising on the development and marketing of business tourism to the city.

Secondly, the lack of detailed and systematic research on the attitudes and behaviour of visitors to Istanbul leads any investigation to rely on the intuitive assumptions and perceptions of sector stakeholders on demand characteristics. Finally, it is the developing destination status of the city, which may be associated with the limited knowledge of the stakeholders on the actual appeal of the city to visitors travelling with specific motives. Unlike the other well-established case study cities, it could be argued that the tourism sector itself is unaware of its potential and existing target segments. There is no doubt that, an early determination of extensive visitor types would benefit Istanbul to evolve as a competitive tourist destination providing that systematic and consistent plans support the growth of tourism through attracting stable and befitting market segments.

Figure 7.18. Market Segments of Istanbul According to the Purpose of Visit



Having mentioned the possible reasons for the limited codes covered during the primary data analysis, the code *'attracting groups'* was mentioned by 8 interviewees. Most of the interviewees shared the opinion that Istanbul is still perceived as a chaotic and unsafe destination. Consequently, visitors prefer the comfort of packaged tours, where their holiday itinerary is pre-designed by travel agents and tour operators. One interviewee further stated that even those travellers from short-haul markets such as Europe come in groups, where the tendency in other city destinations is to receive packaged tours mostly from long-haul visitor generators. The perception of Turkey as a mass tourism destination was also raised by one interviewee, who referred to the packaging of Istanbul with other destinations in the country for scheduled holidays. The code *'attracting individuals'*, meantime, was only attached to two codes, which stressed the importance of emerging markets like Eastern Europe and Russia and the visitors from these markets travelling either individually or in small groups:

> *"We get both groups and individual travellers. It is difficult to say which nationalities come in groups and which ones come individually. Those from Russia, whose main purpose is shopping, for example, come either as couples or in small groups of four" [Istanbul Interview: 14].*

> *"Istanbul used to attract the sophisticated elite mainly from the Western Europe in the 1960s and 70s. With the start of the mass tourism, this has changed. We now come across many visitor groups in the Sultanahmet Square. They do come through package holidays of tour operators. A package holiday in Istanbul is much more expensive now than ten years ago. But they prefer it this way, since Istanbul is still an unknown place for most people" [Istanbul Interview: 17].*

The only other code in Figure 7.18 is *'attracting business visitors'*, which was attached to 10 quotations during the interviews' analysis. Three interviewees argued that the development of business tourism should be paid greater attention by the responsible authorities and that there is a need to build more purpose-build conference and exhibition centres in order to enrich the competitiveness of the city in the international MICE market. Six statements, on the other hand, were on the importance of Istanbul as the business, financial and trade centre of Turkey and referred to the current reliance of the accommodation sector on the business market.

One interview further argued that the recent developments such as the establishment of the ICVB and the increasing number of conference centres, have strengthened the appeal of Istanbul not only for international conference organisers but also for incentive groups. Lastly, one interviewee pinpointed at the short duration of stay of business travellers and suggested that necessary precautions should be taken to expand their stay in the city through organising business meetings with the combination of visits to attractions and other tourist sites. Overall, the interviewees were found to acknowledge the importance of this specific market, which is evidently among the high-spender markets for all the case study destinations. Examples of the quotations are as follows:

> *"Istanbul is the trade centre of Turkey. Following the disappearance of Beirut from the international map, it has become one of the important financial centres of the Middle East, too. But, businessmen come during weekdays and do not stay long. Maybe their meetings could be deliberately scheduled to take place on Fridays, so that they would be encouraged to stay throughout the weekend. They may be encouraged to come with their families... I think, the number of business visitors is around 700,000 at the moment. If they come as families, the number gets doubled. So does the tourism income generated from this market" [Istanbul Interview: 6].*

> *"Until the opening of the Lutfi Kirdar Congress Centre, Istanbul was way behind other international congress cities in terms of business visitors attracted. It is improving now. However, only if the number of conference and exhibition centres increases, we would become one of the world trade cities. The geographic situation of Istanbul is ideal for such proposition" [Istanbul Interview: 11].*

To sum up, the key reason for a segmentation approach according to the main motive of travel is that the particular needs and expectations of diverse market segments could be identified and fulfilled more appropriately and effectively by city marketers than undifferentiated segmentation. The primary research of this study indicates that urban destinations benefit from variety of tourism attractions and services appealing to numerous visitor types. The important lesson learnt is that cities should carefully decide their target markets, which could be served by the matching product offers of the tourism sector. While the positioning of cities as tourist destinations in selected markets may take long periods of time through the implementation of systematic and consistent planning and marketing, a strong image, as in the case of Amsterdam, may bear pitfalls in shifting from existing and unwanted segments into more desirable and lucrative ones. In Istanbul, there is firstly a need to identify primary target segments. Further product development and improvement may result in additional segments to be considered by the authorities and the sector in the future.

7.3.3. Marketing Tools

Following the identification of target segments, destination marketing moves onto the allocation of promotion budget between selected marketing tools. Kotler and Andreasen (1996) note that promotion budget should be spent with care over different market segments, geographical areas and time periods, while any increase in visitor numbers and tourism expenditure can be associated with the actual response of the target audience. This response can, later, be used as an indicator for the success of marketing efforts. In order to ensure that limited promotion money is used effectively and to provoke market potential, the authors specify key factors to be considered during the selection of marketing tools as: target audience habits towards promotional campaigns; the nature of the product or service offered; timing and; cost.

Morgan and Pritchard (1998) further argue that the impact of promotion should not solely be to increase sales directly, especially in relation to established brands, but to improve people's attitude towards the product, thus serving long-term organisational objectives. City destinations, where marketing is, ideally, a part of a long-term planning process, should adopt this approach and concentrate on consistent and desirable image formation and maintenance, which would, as a result, produce more effective and lasting benefits for the tourism sector than ad hoc efforts causing confusion and misconception among potential visitors. To this end, most cities, in practice, produce guides and maps; advertise in print and on television; organise familiarisation tours; operate tourist information offices; attend trade fairs and; create web sites in order to put their city in the fiercely competitive international tourism map (Holcomb, 1999).

These various marketing tools are discussed in Chapter 3 in relation to city marketing and will not be further assessed for their comparative advantages and disadvantages here. Instead, this section focuses on the marketing tools used by the case studies. Nevertheless, it is understandably impossible to analyse all the marketing tools used by the manifold organisations and establishments operating in the cities due to the limitations of the research. Therefore, the evaluation is restricted to the most recent marketing activities of the leading tourism authorities (LTA) and the perception of the interviewees on the tools used by their organisations individually and the ones adopted by the concerned LTAs.

7.3.3.1. London: Promotion in the Aftermath of Crises

The promotional activities of Visit London (*former London Tourist Board -LTB*) has been particularly intense following a series of crises hitting the tourism sector in 2001. The foot and mouth disease and the 9/11 terrorist attacks followed by the US military action against Afghanistan and Iraq damaged the inbound tourism to London dramatically. Prior to the tragic events of September 2001, the LTB introduced its domestic market campaign called *'Summer in the City'* to reverse the negative impacts of the foot and mouth disease on tourism. The campaign focussed on three key themes: galleries, arts, museums and attractions; summer festivals in parks and other outdoor recreational activities and; shopping. 150,000 copies of the campaign leaflet were distributed through a major supermarket chain, tourist information centres and by direct mail to previous London visitors. Supported by a specially designed website and a supplement inserted into a national newspaper, the campaign was jointly run by the LTB and a UK-based tour operator, which later announced an additional sales income of over £350,000 during the campaign period (Hopper, 2002; LTBCB, 2002).

Soon after the completion of this domestic campaign, the 9/11 attacks hit the sector worldwide and the LTB implemented its largest-ever UK campaign in the organisation's history, titled *'The Greatest Show on Earth'*. The campaign aimed to boost mainly domestic tourism to London in early 2002 and targeted city break takers with high disposable income from remote localities, so that they would require an overnight stay. With the overall campaign budget of £720,000, press releases, radio advertisements and inserts into national newspapers were used to attract visitors through free admission and discount vouchers to leading attractions and specially staged arts performances. In the same year, the Queen's Golden Jubilee was identified by the LTB as having great potential to pull in visitors. As a result, the campaign called *'Royal London'*, highlighting royalty, pageantry and heritage, was also undertaken in the North America, Europe and domestic markets. In addition to the distribution of 230,000 copies of the *'Royal London Guide'*, the campaign consisted of familiarisation tours for travel journalists, a *'Jubilee'* section on the official LTB website and press releases (Hopper, 2002; LTBCB, 2002).

Following the transformation of the LTB to Visit London (VLL), a new overall marketing identity was launched in January 2003. The logo *'Totally London'* was designed and used in all promotional activities of the VLL (*see Appendix 28 for the logo*). In May 2003, the logo was first used for the *'Totally London Month'*, which aimed to celebrate the culture of London and to stimulate interest from the residents of London and domestic visitors. The initial campaign budget of £850,000 was provided by the Mayor of London and the Association of Train Operating Companies, and was spent on television, radio and newspaper advertising. Target audience was offered special discounts to leading attractions and unlimited bus travel on five consecutive weekends for just £1 in May-June 2003. The VLL states that 526,000 Londoners, who participated in the events, generated over £17.6 million of new spending in the tourism sector (VLL, 2003a and 2004d). The television advert used in the campaign targeted a national audience of 25 to 44 year olds and aimed to build the London brand through highlighting museums, attractions, the West End theatres and night life. According to the VLL (2004d), 83% who recalled the advert believed London had many new things to see and do, and 51% said they were likely to visit London in the next 12-18 months.

The success of the campaign resulted in *'Totally London Tour'* launched in September 2003. Supported by radio and newspaper advertisements, the Tour focussed on the cultural appeal of London and consisted of free music, fashion, food and arts events held across the city. According to the VLL, over one million people took part in eleven events. The sequel of the *'totally'* campaigns, was also carried out in North America in April 2004. *'Totally London: North America'* was designed to raise awareness of the city mainly in the US. Radio adverts were selected to encourage the target audience to visit the official website of the VLL, where potential visitors are offered the opportunity of online booking services for the participating airline and hotel companies (VLL, 2004d).

While the domestic market was the primary target of the promotional campaigns in 2003, the VLL also collaborated with various organisations in international marketing, but concentrated on few key countries *-i.e. the USA, Japan, France and Ireland-*. In the US, the organisation utilised direct mail and press advertising in association with an international hotel chain, a US-based tour operator and VisitBritain in order to stimulate short-break high-spending visitors to London. In Japan, the target of editorial adverts was retired couples and employed women, while the VLL joined with a budget airline in newspaper advertising to recover the short-break market from France. Finally, in Ireland, the VLL worked with an airline company, a hotel chain and VisitBritain to attract visitors to Christmas shopping and the January sales in 2003 (VLL, 2003a).

In 2004, the VLL prepared a free guide called *'Get Out and Go Further'* and distributed it at key events. The guide, which was also inserted into two national papers, once again targeted domestic visitors and Londoners, and covered attractions across the whole Greater London with the aim of diverting visitors from central areas to outer boroughs. Similarly, five million copies of a 16-page *'Go London'* insert was also distributed through national newspapers in order to strengthen the city's image as a place for shopping and entertainment among potential domestic visitors. In addition to such one-off publications, the organisation continuously publishes and distributes the official London visitors' map and *'theme'* guides including: *'The Shop London Guide'*; *'London Gay Guide'*; *'The Asian London Guide'*; *'Eat London Guide'*; *'What's New in*

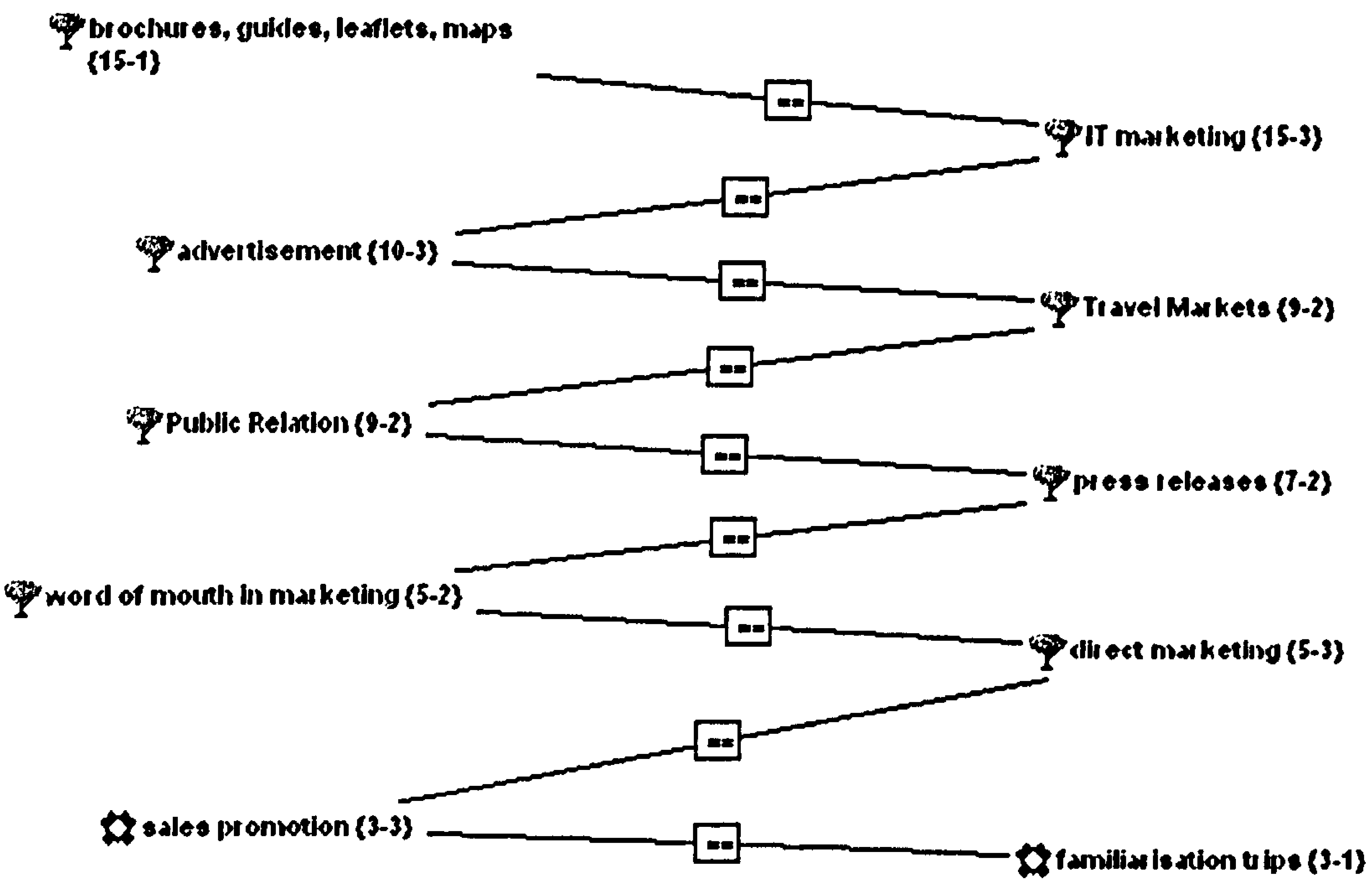
London'; *'Entertainment and Leisure in London'*; *'Study London'* and; *'Where to Stay in London'* (VLL, 2004d and 2004e).

Visit London attends tourism fairs and exhibitions across the world every year. In 2004, the organisation had its own stand in various consumer and trade fairs in the UK, USA, Germany, Italy, Spain, Ireland, Netherlands and France, whereas it was represented by VisitBritain in various other exhibitions held in countries ranging from Japan to Malaysia, and from Australia to Canada (VLL, 2004e). The greatest advantage of the organisation in terms of direct sales to the worldwide tourism trade is the World Travel Market held in the city in November every year. The VLL recently puts the emphasis on raising awareness of London's new brand and distributes its own published materials as well as the brochures of some member organisations at such exhibitions (VLL, 2004d).

For the business market, the VLL launched a campaign called *'Meeting in Progress'* consisting of newspapers adverts and specially published brochures in 2004. The campaign highlighted the availability of unusual venues such as the Imperial War Museum and Natural History Museum for meetings and congresses and was said to result in £23 million of confirmed businesses generated from the UK, Europe and North America (VLL, 2004d). The organisation has been running the *'London Ambassador Programme'*, which aims to encourage key people in the sectors ranging from finance to engineering, and from science to medicine to work with the VLL and to promote the benefits of holding conferences and meetings in London. The VLL also publishes *'London Meeting Guide'*, which provides information on conference and exhibition facilities, special venues and hotels with MICE facilities (VLL, 2003a).

Arguably the most unique marketing tool used by the VLL is the London TV, which has been online since September 2004. This destination-specific channel can be watched by Sky Digital subscribers across the world and broadcasts various programmes on topics like entertainment, attractions, restaurants, events, arts and shopping (VLL, 2004d). The official website of the VLL, meantime, can be accessed on www.visitlondon.com. The site can be viewed in English, French, German, Spanish, Italian, Dutch and Japanese and contains links to the latest cultural and arts events, shopping, restaurants, accommodation, sports activities, entertainment, business and conventions and other tourist information. On the main page, visitors are asked for their country of origin -*i.e. North America, UK, Europe, Japan and the rest of the world*-, so that any information, offers and booking services relevant to specific market generators can be viewed by the users (www.visitlondon.com accessed on 4 January 2005). The official VLL website was visited over 500,000 users per month on average and generated £2 million worth of online accommodation bookings within the first six months of the service's launch in 2003 (VLL, 2004d).

Figure 7.19. Marketing Tools to Promote London



The London interviewees of this research were asked which marketing tools they consider most effective when promoting the city. Figure 7.19 shows all the tools mentioned by the key personnel in order of reoccurrence. The codes *'brochures, guides, leaflets, maps'* and *'IT marketing'* lead the list with 15 quotations each. Almost all of the interviewees stated that they publish written marketing material either in the form of a flyer or a travel guide depending on the nature of the product concerned and the marketing budgets of their organisations. The purpose of distributing brochures, maps and guides was shown by one interviewee as to give as much and accurate information as possible to both potential and existing visitors and to encourage them to purchase their individual products and services. Another interviewee argued that tourism organisations gain mutual benefits, if they collaborate when distributing their marketing material and provide the leaflets and brochures of each other to their customers. The interviewees, who represent associations and partnerships, confirmed that their published material covering numerous organisations within the concept of a product package are supported by their members:

> *"We offer our members the chance to distribute their information in any way possible to make sure that people are aware of what is going on in London's theatres. That is why we publish The London Theatre Guide" [London Interview: 11].*

The increasing importance of Internet as a marketing tool was reflected in the interviews findings. 15 quotations attached to the code *'IT marketing'* include such opinions that websites are cost-effective, easy to access and ideal for constant and timely information updates. The concerns, however, were raised with regards to the high cost of website designs; technology-illiterate elderly, who refuse to use Internet and; the questionable effectiveness of the websites created by small- and medium-size organisations. One interviewee argued that potential visitors, especially those international ones, prefer to obtain collective information from a single source and often access to the official sites of the leading tourism authorities or to the destination pages of main internet servers:

> *"We do have a website. You can find all the contact details on our page with links to other key organisations. But, the London Tourist Board is the focal point for most enquiries into London... If you are going to visit London, the first website you would like to see is theirs. That is why their website is most important than ours or any other organisation" [London Interview: 5].*

The code *'advertisement'* was the third most mentioned marketing tool with 10 quotations. Although the majority of the interviewees agreed on the effectiveness of collective advertising, which concentrate on the London brand rather than individual products, 6 interviewees added that their organisations run individual campaigns and use newspapers, magazines and underground billboards to deliver their messages particularly to the domestic market and existing visitors. While one interviewee noted that limited marketing budgets restrict tourism establishments from operating expensive advertisements, another interviewee criticised the London Tourist Board's campaigns for their lack of consistency. It should be noted that the London interviews were held prior to the transformation of the LTB to the VLL, hence prior to the launch of the above-mentioned current advertisement campaigns of the organisation:

> *"What happens with the (LTB) over the last five years is that they run very small advertising campaigns... They only last for two or three weeks. Sometimes it lasts for a month, but then they stop. Travelling public has a very short memory. They just forget. It is too difficult to market a city in a very short period of time. They really need to have some continuity" [London Interview: 8].*

The codes *'Travel Markets'* and *'Public Relations'* were attached to 9 quotations each. The interview findings suggest that international travel fairs and exhibitions are often attended by partnership organisations and leading tourism authorities, which distribute their members' published material on their behalf, whereas tourism organisations tend to take part in those exhibitions held in the UK, targeting mainly domestic tourism and travel trade. With regards to the later code, however, all interviewees stated that they run their own public relation activities in order to build their customer profiles and to increase their sales through ensuring customer satisfaction. Partnership organisations, meantime, are expected to build close relationships with governmental authorities and international bodies:

"Something like the British Travel Trade was great for us. Because, you meet with people such as coach operators and excursion operators, who look at your brochures and think that that is something they may include in their itineraries" [London Interview: 2].

"We take stands at exhibitions overseas. We have been to Germany, South Africa, Hong Kong, the US and the World Travel Market here. Our members can either buy a space on that stand or give us their brochures, so that they can exhibit their product to the travel trade of other countries" [London Interview: 8].

"We do run public relation activities. To be more specific, we try to keep in touch with what we call 'opinion formers'. These are the people we need to persuade that we are doing a good job and we are sustaining our brand values as an attraction. This group of people include our previous visitors, journalists, tour operators and anyone else, who requires information about our museum or have something to say about it" [London Interview: 3].

The code *'press releases'* was mentioned by 7 interviewees, who stressed the advantages of this marketing tool as: cheap and effective in terms of its reach to a large number of target audience and; its credibility due to up-to-date information delivery through media coverage. 5 interviewees, meantime, emphasised the importance of *'word-of-mouth'* in destination marketing. These interviewees agreed on the fact that satisfied visitors would not only return to London, where repeat visits account for an important share among all trips, but also recommend it to their friends and relatives. Direct marketing by mail and sale calls was also mentioned by 5 interviewees regarding the promotion of their individual products and services. On a broader scale, the importance of tourist information centres dealing with the enquiries of existing visitors and their role as direct marketing branches of the whole London tourist product package were raised by two interviewees. Examples of these quotations are as follows:

"We distribute press releases to journalists, who are curious about our tasks and what we are doing currently. That is an effective way of getting your message across, since it is done on your behalf and free of charge" [London Interview: 12].

"Our recent survey showed that although people receive information from brochures and guides, their principal source of information is the recommendations of friends and relatives. They value such recommendations much more than what we offer them in print" [London Interview: 17].

The last group of codes include *'sales promotion'* and *'familiarisation tours'* mentioned 3 times each. In addition to the provision of free printed material, the VLL sells several products including key rings, mugs, T-shirts and hats with its London logo on them at its tourist information centres (VLL, 2003a). Such products are purchased by travellers as souvenirs, but work as marketing tools once they are taken back home and used by previous visitors. The limited number of statements attached to these codes can be explained with their high costs compared to other marketing tools. That is why they are mainly employed by large tourism organisations and destination-wide authorities, which can provide sufficient funds for merchandising, stocking and displaying products in the case of sales promotion, and for one-off packaged itineraries with accommodation and flight bookings for journalists and tour operators in the case of familiarisation tours. Those interviewees, who mentioned these tools, supported their use in destination marketing:

> *"I have been employed by the (LTB) to take some foreign journalists for a walk along the Bank side next month. I think that is a very effective way of marketing" [London Interview: 9].*

> *"We have sales promotion activities. It can be anything from a give-away pen with our logo on to promotional Thames' tours for our potential customers. We hire a boat, work with a catering company, book a band and go along the banks just for a couple of hours. That works very well for us" [London Interview: 5].*

7.3.3.2. Amsterdam: Innovative Tools for Promotion

Some of the campaigns carried out in the recent past by the leading tourism authorities of Amsterdam were mentioned in the subheadings of Section 7.2.2. Among these, the campaign called *'Amsterdam: The World City'* was initially launched by the Amsterdam Tourist Board (VVV) in 1997 in co-operation with the City of Amsterdam (CoA) and the Amsterdam Chamber of Commerce. The campaign initially aimed to increase the amount of day trips to the city by Dutch visitors and consisted of press releases, PR activities and direct mailing of brochures and leaflets. In addition, the campaign advertisement was published in more than 30 regional newspapers across the Netherlands and was supported by an informative calendar called *'365 Tips for a Day in Amsterdam'*. In the first year of the campaign's implementation, the VVV estimated an annual increase in domestic day trips at about 5% and continued with the scheme in the plan period 2001-2004 with a target shift from day trippers to potential overnight staying visitors among the domestic *'elderly'* and *'families with kids'* markets (VVV, 1997 and 2000a).

In the early 1990s, the Ministry of Economic Affairs covered a strategy in its tourism plans to market the whole country as a 'waterland' surrounded by the sea and canals. In line with this strategy, the VVV introduced its own campaign *'Amsterdam: City on the Water'*, which highlighted the history of the city as a centre of sea trade (Dahles, 1998). In 2003, the campaign was re-launched, as the year 2005 was dedicated to celebrate the city's maritime history under the same campaign title. The VVV carried out familiarisation tours for national and international journalists; published brochures in English, Dutch and German; distributed press releases on special events to be held throughout 2005 including the exhibition *'Venezia: Art of the 18th Century'* and the boat show *'SAIL 2005'* and; created a website to provide information to potential visitors -*i.e.* www.amsterdamcityonthewater.com *accessed on 5 January 2005*- (VVV, 2000a and 2004a).

Since 2002, the VVV has teamed up with the CoA to promote the diversity of Amsterdam and its unique and distinguishing features, such as the longest pipe, the largest diamond and the narrowest house in the world. The campaign called *'Amsterdam Surprises'* has been targeting mainly domestic visitors, who would be interested in such novel aspects of the city, through printed material and a special web link from the CoA's official site (CoA, 2003b). Both of the above mentioned campaigns -*i.e. 'Amsterdam: City on the Water' and 'Amsterdam Surprises'*- have been supported by the promotional brochures and leaflets called *'Amsterdam Arts Adventure'* and *'Amsterdam Winter Adventure'* in order to nourish the image of the city as a cultural and heritage destination with variety of pull-in products appealing to both domestic and international visitors all year round (VVV, 2000a, 2002 and 2004a).

Recently, the VVV has announced that its marketing efforts will concentrate on customer-oriented promotion through the organisation of annual theme events and the improvement of its computer-based information sources (VVV, 2000a and 2004a). Soon after the *'Amsterdam: City on Water'* campaign ceases in the end of 2005, the new campaign *'2006: The Year of Rembrandt'* will be launched. The VVV aims to collaborate with airline and hotel companies, which would offer special discounts to visitors from the UK, Germany and France, and to organise special events and exhibitions to celebrate the 400th birthday of the famous Dutch painter. The international marketing of this and forthcoming *'theme'* years will be executed by the Netherlands Board of Tourism and Conventions (NBTC) and will combine printed material, newspapers advertisements and web links from both the VVV's and NBTC's official websites (VVV, 2004a).

The VVV has been a partner of the *'Cool Capitals'* programme operated in co-operation with the leading tourism authorities of Zurich and Vienna since the beginning of 2002. The programme, which has been undertaken to stimulate visitors mainly from North America, is sponsored by private business partners including the Pioneer, Canon and KetelOne Vodka and embraces various marketing tools such as: inserts into travel and leisure magazines *-i.e. fashion, culinary, architecture, design and arts magazines-*; a specially designed website with flight and accommodation booking opportunities to all three cities *-www.coolcapitals.com-* and; brochures and leaflets. The website is designed to encourage internet users to register onto the member database, so that they can be informed on special flight and accommodation deals either by post or by e-mail messages (VVV, 2004a).

As mentioned above, the VVV has been searching for new and innovative ways to promote Amsterdam. The most recent product the organisation has introduced in co-operation with the CoA and the Vodafone mobile network company, is the *'Timespots Amsterdam'* device, which offers users information, navigation and communication tools during their stay in the city. The device can be used as a camera and a mobile phone with access to Internet. Designed in a size of a personal databank, Timespots contains an up to date event calendar; city maps; local news with weather forecast; brief information about the main tourist attractions and; the contact details of participating organisations. In case users require further information, they are automatically directed either to the help desk of the VVV by phone or to the official website via Internet. Timespots can be rented at fixed prices for one, two or three days, throughout a weekend or for a week from the Tourist Information Centres (TICs) and participating tourism organisations (VVV, 2004a).

The search for new tools has also resulted in the former *'Amsterdam Leisure Pass'* to be converted into the *'I amsterdam'* card. While the pass pack contained a city guide, a map and a booklet of free entrance tickets to major museums and discount vouchers for restaurants and shops at a fixed price, the *'I amsterdam'* card retains the whole voucher system only with the difference of a chip-card replacing the booklet. The card can be purchased for one, two or three days and is again available from the TICs and participating organisations. In addition to the free entrance and discount vouchers, the card offers a free canal boat tour and free use of public transportation. The printed material of the pack is published in German, English, French, Dutch, Italian and Spanish. The logo created for the new card, meantime, is now used as the primary logo of Amsterdam, which is printed on the promotional merchandises of the VVV and is displayed across the city by tourist organisations (*see Appendix 29 for this and other logos of Amsterdam*) (VVV, 2000a and 2004a).

While such new computer-based tools have been introduced by the VVV, the official website of the organisation *-i.e.* www.amsterdamtouristboard- is designed for corporate use only. The website aimed to assist potential visitors, meantime, is the official site of the NBTC *-i.e.* www.holland.com-, which has a special page on Amsterdam. The site can be viewed in 12 different languages ranging from Dutch to Korean, and from Polish to Chinese. The page on Amsterdam includes: information on the leading visitor attractions and sites of the city; online accommodation booking; special up to date offers; shopping, cultural, arts and sports activities; the list of restaurants and entertainment establishments; city maps and; practical tourist information about the Dutch culture (www.holland.com/uk/cities/amsterdam accessed on 5 January 2005).

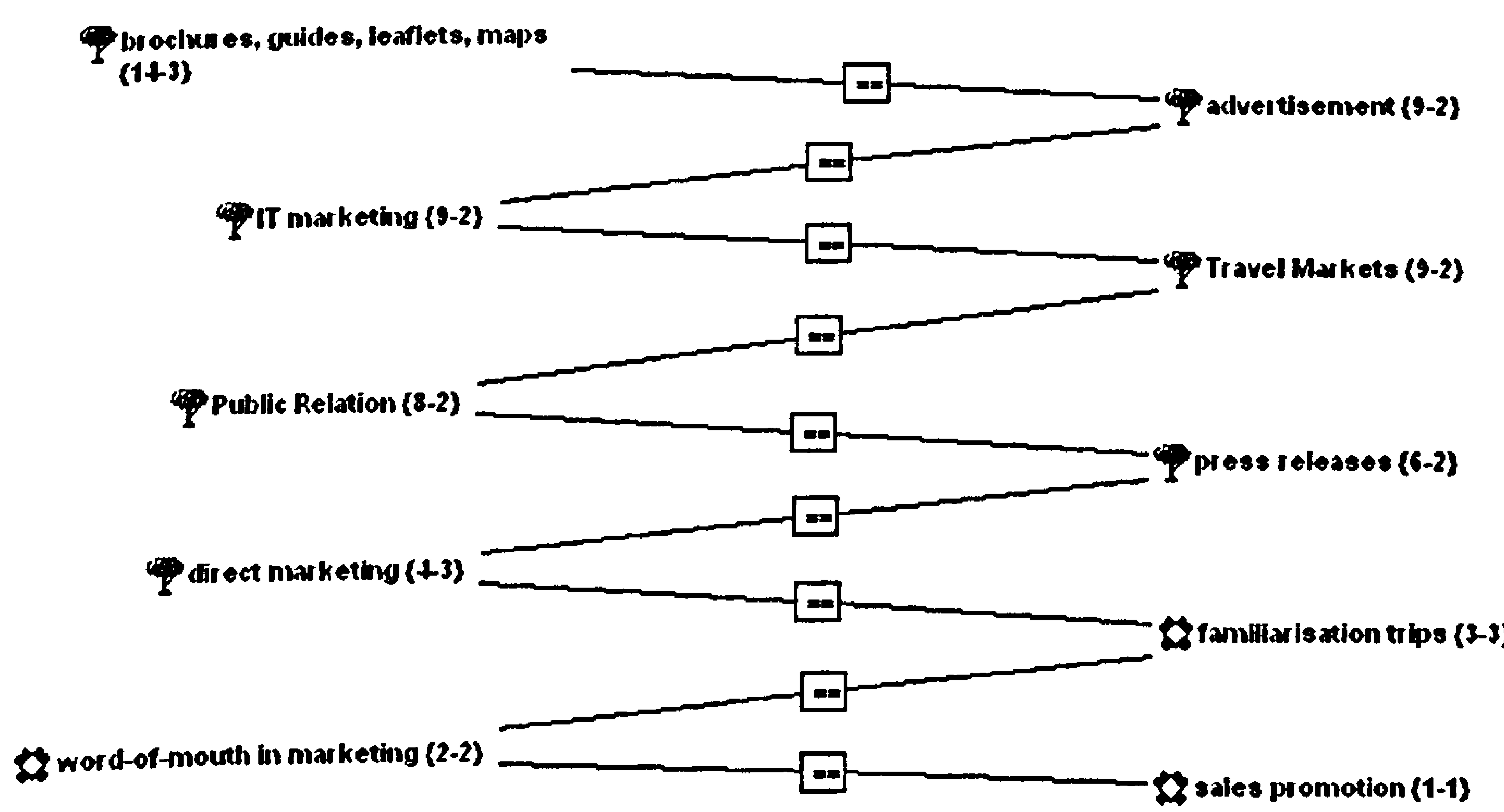
Other marketing tools used by the VVV include regularly published brochures and guides, travel trades and exhibitions, familiarisation trips, press releases, a call centre and TICs operating at four different locations -*i.e. Central Station, Station Square, Leidsplein and Schiphol Airport*-. The currently published and distributed material includes *'Amsterdam City Guide'*, *'Amsterdam City Map'*, *'Day-by-Day'* and *'Accommodation in Amsterdam'*. The organisation is represented by the NBTC at international trade shows and exhibitions held in the UK, USA, Germany, France, Spain and Italy. Based on a VVV survey suggesting that editorial advertisements have been more effective than any other form of promotion in the past, the organisation aims to increase the number of media representatives on familiarisation trips. While 800 people have been on such trips during 2001-04, the target figure has been set as 1,200 journalists, photographers and film producers between 2005-08. The 24-hour call centre, meantime, is mainly operated to assist those visitors, who require any sort of information about Amsterdam pre-arrival and during their stay (VVV, 2004a).

Finally, for the business tourism market, the VVV runs advertisement campaigns in the US, the UK and the Netherlands. In 2003, the organisation collaborated with the MvEZ and CoA for a campaign called *'Amsterdam: Pro-Congress'*. Aimed at leading international conference organisers, the campaign consisted of brochure distribution, stands at international trade shows and direct sale calls by an appointed team. As of 2005, this campaign will be carried out with the support of RAI Conference Centre and several hotel establishments, under a new name: *'Amsterdam: Convention Circle'*. The VVV will put more emphasis on press releases, direct marketing, the distribution of the campaign CD-ROMs and DVDs across the world and the establishment of a customer database embracing a list of major international companies, associations, unions and education centres. The guide *'Conference Manual: Amsterdam'* will continue to be published highlighting up to date opportunities that the city can offer, such VIP treatment with limousine hires, contemporary catering facilities and unique locations for business meetings and conferences (ACB, 2003; VVV, 2004a).

The interview findings cover both the statements on the marketing tools used by individual tourism organisations and the evaluation of the tools executed by the leading tourist authorities to promote the city as a whole package. As in London, the code *'brochures, leaflets and guides'* was the most mentioned tool with 14 quotations (*see Figure 7.20*). All of the key personnel interviewed confirmed that their organisations are involved in the publication of promotional material and their distribution either during the actual stay of existing visitors or pre-arrival to the city for potential visitor markets. Three interviewees noted that their organisations are covered by the printed material of the VVV and NBTC. Another interviewee argued that the NBTC appreciates the importance of Amsterdam as a gateway to the whole country particularly for international markets, hence pays great attention to the comprehensive presentation of the city on brochures and guides. While the interviewees representing partnerships and associations stated that their members contribute to their collective publications and distribute them to their customers, one interviewee emphasised the importance of regular updates to promotional material according to changing customer attitudes, needs and wants:

> *"You need to provide sufficient amount of information to visitors about alternative tourism products and services. People may not be interested in everything. Some may be here just for shopping and would like to find out about shopping areas, malls and specialised antique shops. So, you need a brochure just for shopping. Others may be interested in churches, museums and historic buildings. You need to publish a different brochure for them... There is clearly a need to identify changes and new trends taking place in the sector and to update visitor guides and brochures regularly" [Amsterdam Interview: 14].*

Figure 7.20. Marketing Tools used to Promote Amsterdam



The codes *'advertisement'*, *'IT marketing'* and *'Travel Markets'* were all attached to 9 quotations and shared the second place among the most mentioned tools. Most of the quotations under the code *'advertisement'* were regarding the marketing activities of the VVV rather than the advertisement of individual organisations' products and services. As one interviewee stressed, citywide organisations and international companies are more capable of running expensive advertisement campaigns. Two interviewees favoured the primary objective of the VVV's campaigns to reverse the negative image perceptions of Amsterdam as a *'sex and drugs'* destination by focusing more on culture and heritage. Another four interviewees commented on the recent approach of the VVV to select *'theme'* years and to concentrate on special events and exhibitions on their marketing activities. Overall, this approach was found successful, but further co-operation among sector stakeholders was recommended for the collective and effective promotion of the *'theme'* years:

> *"The (VVV) dedicates each year to something new and organises special events. They first started in 1993 with 'The Year of Golden Century'. In 1996, they introduced another one called 'Amsterdam: City on Water'. The main idea behind such celebrations is exciting. They publish special brochures, posters and guides and broadcast tv ads. They have been successful in terms of domestic marketing. But, they need to work in co-operation with tourism organisations and especially with international tour operators, if they want more international visitors" [Amsterdam Interview: 8].*

Nine interviewees stated that their organisations have an Internet site, while two of them added that they will be investing further in website design in order to create better and interactive sites. Two quotations attached to the code *'IT marketing'* was about the advantages of Internet as an informative tool. These interviewees referred to the possibilities of directing potential visitors to on-line sites, where they can obtain information suiting their individual interests and needs, and of spreading up to date news and events across the world in seconds. Another interviewee mentioned that Internet provides organisations with an opportunity to establish an on-line customer database, where information on both potential and existing visitors can be collected and updated systematically. 9 quotations of the code *'Travel Markets'*, meantime, mainly pertained to two main issues. Five interviewees argued that they could not afford to attend travel markets due to their limited marketing budgets, but benefit from their promotional publications taken to such events by the VVV and partnership organisations. Those four representatives of the organisations attending trade exhibitions and shows, on the other hand, emphasised the importance of such events for business-to-business marketing. Examples of the quotations attached to these two codes are as follows:

> *"Our Internet site is one of the first ones to be launched by a convention centre in the Netherlands. I think it is an effective way of promoting our centre. We get some feedback from the users and keep them posted about new events and shows" [Amsterdam Interview: 7].*

"We have so many different target markets and involve in different marketing activities for each of them. For business-to-business marketing, for example, we go to trade fairs. This year, we will go to the ones held in the UK and the USA" [Amsterdam Interview: 5].

The codes *'Public Relations'*, *'press releases'* and *'direct marketing'* follow the above codes with 8, 6 and 4 quotations respectively. Those interviewees who mentioned public relations and press releases anonymously established a consensus on these tools' effectiveness to reposition Amsterdam as a cultural destination and to counterattack negative media coverage influencing the existing perception of the city as an unsafe place among potential visitors. One interviewee also referred to the broadcasting of special events and festivals on television channels and their remarkable impact to induce an interest both from international and domestic markets. One of the four interviewees, whose organisations appoint sales personnel for direct marketing, stated that one-to-one sale calls are the most effective marketing tool for the promotion of Amsterdam to conference organisers and destination management companies:

"Press releases are important to provide information, but the most effective marketing tool in the MICE business is to sell the city and its convention facilities directly to international conference organisers and destination management companies" [Amsterdam Interview: 11].

"Media plays an important role in attracting visitors to arts events. Some concerts and festivals are shown on tv channels for hours. Some radio stations broadcast concerts live. This is a very impressive and cheap way of promoting our events to people. We even make money, as these media companies sponsor our events in order to get the broadcasting copyrights of staged shows and performances" [Amsterdam Interview: 9].

Finally, the codes *'familiarisation trips'*, *'word-of-mouth in marketing'* and *'sales promotion'* were linked to 3, 2 and 1 quotations respectively. Unsurprisingly, the only interviewees, who mentioned that they organise familiarisation trips, were the representatives of the tourism authorities attempting to market Amsterdam as a destination package. One interviewee explained the importance of such trips with international conferences and meetings providing significant opportunities for the city to be on newspaper headlines, as such events attract not only delegates, but also journalists. Two interviewees indicated that the recommendations of previous visitors would cause a snowball effect through word-of-mouth especially because the pre-arrival perception of Amsterdam was argued to change after the actual stay in the city. Sales promotion, meantime, was mentioned by one interviewee, who revealed that complimentary products and merchandising of various goods with a company logo on them are used to promote their tourist product. The following quotations are examples:

> *"The EuroSummit was a good opportunity to raise the profile of Amsterdam. A lot of journalists and diplomats came to see the real side of Amsterdam. All these journalists have written about the city and the summit, which remained on newspaper headlines for awhile" [Amsterdam Interview: 4].*

> *"I think one of the most effective way of marketing is word-of-mouth marketing. People trust their friends. If they have enjoyed their holiday in a particular destination, their friends think that they would have a similar experience... In the case of Amsterdam, word-of-mouth is more important. Because I believe that people's attitude towards the city changes remarkably after their first visit" [Amsterdam Interview: 13].*

7.3.3.3. Istanbul: Promotion of a Pilot Destination in Decentralisation

As noted in Section 7.3.2, the Ministry of Culture and Tourism (TCKTB) has only recently decided to divert its promotional efforts to individual destinations as opposed to the emphasis on the whole country with all possible tourism alternatives and opportunities in the previous marketing campaigns (TCKTB, 2004a). Although Istanbul has been selected as the pilot destination with a strategic tourism development plan covering action points on product development and improvement, the strategies on how the city will be marketed in major generator countries are vaguely defined by the Ministry with no clear signs of the selected tools for effective promotion of the city. In fact, Istanbul is still covered as a component of either the whole destination package of Turkey, or the one of the Marmara Region where the city is located in various promotional material published and distributed by the Ministry. Moreover, unlike the recently proposed concentration on individual destinations, the promotional efforts are still highly centralised and executed solely by the TCKTB.

One of the current marketing campaigns run by the TCKTB is called '*Culture in Turkey*', which mainly consists of an advertisement film to be broadcasted on TV channels in Western Europe and to be shown during international tourism fairs and exhibitions, which the Ministry takes part in across the world. The campaign film aims to create awareness of Turkey as a cultural destination with scenes from all around the country. The images of Istanbul including a view of the Bosphorus Strait, the Sultanahmet Square with the Blue Mosque and the Maiden Tower are used in addition to the scenes from various cultural events such as ballet and classical music concert performances (www.kultur.gov.tr accessed on 7 January 2005).

The first ever campaign specifically focusing on Istanbul as a tourist destination, meantime, was initiated in 2003, when the Ministry decided to use the 80th anniversary of the country's establishment as a republic as an opportunity to undertake marketing activities in the leading visitor generator countries. The campaign *'Istanbul: Timeless City'* was initially launched in New York and combined exhibitions, arts shows and special performances by Turkish artists organised within the framework of anniversary celebrations as well as supporting press releases and a TV advertisement. The hidden message of the advertisement was that Istanbul is an exotic and mystic destination with a unique culture, architecture and history at the doorstep of Europe. In other words, the campaign was arguably attempting to draw attention to the city as an oriental, but easily accessible destination. Soon after its launch in the US, the campaign was repeated in the UK, Germany and France (www.kultur.gov.tr accessed on 7 January 2005).

While the Ministry aims to carry on with the image pictured within this campaign, the slogan *'Istanbul: Go with the Rhythm'* is also used in various promotional publications to be distributed mainly during travel fairs and exhibitions. Nevertheless, as mentioned above, the written material on Istanbul and its tourism sector available to existing and potential visitors is limited in comparison to the publications of VVV in Amsterdam and of the VLL in London. Instead of different brochures and guides published to serve different market segments, the TCKTB publishes the Istanbul Tourist Map and the *'Istanbul and Its Environs'* brochure embracing all of tourist products and recreational opportunities *–i.e. heritage sites, eating places, shopping, cultural facilities and other useful tourist information-* not only in the city, but also in other destinations of the Marmara region (TCKTB, 2004c).

In contrast with its finite publications, the TCKTB puts great importance to travel fairs and exhibitions held across the world. Although it is the national tourist product, Turkey, which is marketed with its own stand in such fairs by the Ministry, Istanbul is presented as one of the most important gateway destinations to the country. The Ministry aims to attend; MICE market fairs in the USA, Spain, the UK and Germany; cruise tourism fairs in the UK, France, Germany and Italy and; leisure market fairs in the UK, Germany and Russia in 2005. The TCKTB works in co-operation with the Istanbul Convention and Visitors Bureau (ICVB), the Turkish Hotel Association (TUROB) and the Union of Turkish Travel Agents (TURSAB) for the sector-wide representation of both the country and individual tourist destinations at such exhibitions. Moreover, the TUROB and the TURSAB jointly organise the Mediterranean Tourism Exhibition held in Istanbul annually (TCKTB, 2004d).

Other marketing tools used by the Ministry include an Internet site, tourist information centres and the Tourism Radio. The web site of the TCKTB has a special page on Istanbul and can be viewed in English, German, French, Russian and Spanish. On the site, potential visitors are provided with information on: major tourist attractions; travelling to the city from abroad; brief information on the history and geography of Istanbul; restaurants and cafes; shopping areas; art, culture and entertainment opportunities, and; useful telephone numbers. Unlike the web sites of London and Amsterdam, the site is not designed either to direct users to link pages for on-line accommodation booking or to encourage viewers to provide feedback on their expectations, purpose of visit and personal information, which could then be used for the creation of a potential customer databank and the distribution of information to registered users via e-mail (www.kultur.gov.tr accessed on 7 January 2005).

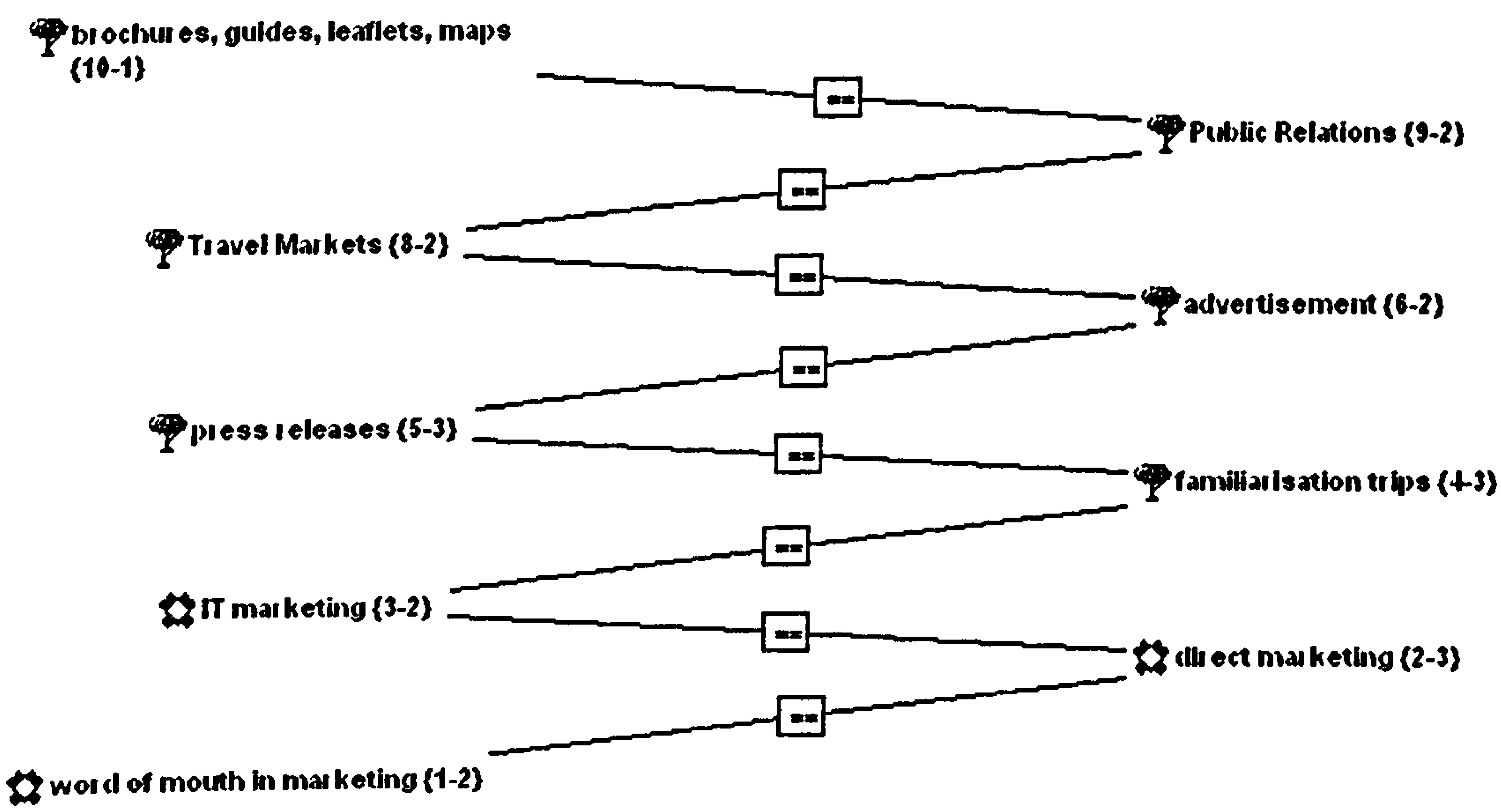
While the Tourism Radio broadcasts in English, French and German between 07.30-12.45 in the mornings and between 18.30-22.00 in the afternoons, it mainly targets existing visitors and aims to inform listeners about up to date tourism information and daily news. Finally, there are six tourist information offices in Istanbul run by the TCKTB for visitor inquiries. The offices are located at the Ataturk Airport, the Sultanahmet Square, the Karakoy Harbour, the Sirkeci Station, Taksim Hilton Hotel and in Beyazit.

The only Istanbul-based organisation, which aims to promote the city as a conference and convention centre is the ICVB. In addition to the advisory services to destination management companies and international conference organisers, the Bureau publishes the *'Meeting Planners Guide for Istanbul'*, the *'Istanbul Fact Sheet'* and the monthly *'Istanbul Bulletin'*. The organisation has a web site on Internet, which specifically targets conference organisers, but also provides information on various aspects of the tourism sector ranging from accommodation alternatives to places of interest and, from currently held festivals to public transportation services (www.icvb.org accessed on 7 January 2005).

While the efforts of the Ministry to concentrate on promoting individual destinations through systematic planning is yet to reach the level of other case study cities' marketing efforts, the interview results of this research suggest that there are minor differences between what the sector stakeholders considered to be most effective tools when selling city destinations in each case study city. As Figure 7.21 displays, the only code, which was not mentioned by the Istanbul interviewees, but was covered during the analyses of the Amsterdam and London interviews, is '*sales promotion*'. Same as the other cities, the code '*brochure, guides, leaflets, maps*' was attached to the highest number of codes during the analysis of the interview findings from Istanbul *–i.e. 10 quotations-*. While six interviewees mentioned that their organisations publish their own marketing material, three interviewees criticised the limited number of brochures printed by the TCKTB. Another interviewee argued that the publications of the Ministry should be distributed on a wider geographical scale to reach new potential market segments extending from Europe to Far East. One quotation, meantime, was regarding the coverage of Istanbul as a component of the national tourism package, while the ideal marketing was suggested to embrace Istanbul only and to publish more destination-based brochures and guides:

> *"It is about time that Istanbul should be marketed on its own. Although the number of brochures on the city is increasing, they are often published by private organisations, which, understandably, aim to encourage visitors to purchase specific products and services during their stay here. There is a need to produce unbiased and informative material and to distribute them not only in the city, but also abroad" [Istanbul Interview: 2].*

Figure 7.21. Marketing Tools to Promote Istanbul



The second most mentioned code was '*Public Relations*' with 9 quotations. Most of the interviewees, who cited this particular marketing tool, referred to the public relation activities run by their individual organisations rather than stating the importance of the tool for marketing the city-wide tourist offer. On the other hand, 3 interviewees argued that public relation in marketing is particularly crucial for the attraction of international events and conferences to Istanbul. These interviewees argued that special occasions such as bidding for the Olympic Games and the organisation of annual arts festivals require constant backing by PR activities. Two interviewees, meantime, disapproved the belated action taking by the TCKTB during crises times and the lack of effective PR activities to transform the perceived negative image of Istanbul in international visitor generators to a positive one:

> *"The lack of PR activities in international markets costs the tourism sector. We already suffer from a negative image. We are no longer a cheap destination. (The authorities) keep saying that Istanbul is located in a superb*

location. That does not help much, if the newspapers abroad announcing a terrorist attack on their headlines at the same time" [Istanbul Interview: 1].

The codes *'Travel Markets'* and *'advertisement'* were attached to 8 and 6 quotations respectively. 5 interviewees mentioned that they either participate in international trade fairs and exhibitions individually or in co-operation with the TCKTB. Overall, these interviewees and three others agreed on the fact that travel markets are the most effective way of marketing Istanbul to intermediate organisations and that the stands managed by the TCKTB are effective in terms of their unique and attractive designs and, qualified personnel working during the exhibitions. One interviewee further added that although the Ministry works in co-operation with sector stakeholders for such events, there is need to participate in more exhibitions and fairs to expand on the existing market profile through reaching new visitor generators. As opposed to the support of the TCKTB and its participation in travel markets by the interviewees, all of the quotations attached the code *'advertisement'* were sceptical about the marketing campaigns of the Ministry carried out in the past. While three interviewees argued that the Ministry should prepare destination-based campaigns rather than national ones, another three quotations were on the lack of consistency in advertisement campaigns, hence their short-lived impact on creating awareness among potential market segments. Examples of these quotations are as follows:

"Advertisement campaigns should be planned and implemented on a long-term basis. It is very unlikely that a newspaper advertisement published for a week and ignored for years afterwards, would result in millions of visitors travelling to Istanbul... Besides, the (TCKTB) still focuses on regional and national tourism promotion... They need identify the strong aspects of Istanbul, and then develop campaigns highlighting these aspects" [Istanbul Interview: 13].

"Promotion activities at international exhibitions have improved a lot over the last few years. The stand of Turkey has a modern design with audiovisuals. It has been presented with the best stand award in a number of exhibitions" [Istanbul Interview: 5]

The codes *'press releases'* and *'familiarisation trips'* were attached to 5 and 4 quotations respectively. Two statements on the effectiveness of press releases were regarding the influence of this marketing tool to counterattack negative media coverage, while two interviewees mentioned that up to date information is best delivered through newspapers and other media organisations, which are considered as unbiased information sources by potential visitors. 4 interviewees supported the familiarisation trips occasionally arranged by the TCKTB. 3 of these interviewees further added that they co-operate with the Ministry and take responsibility for either proposing itineraries for journalists and tour operators invited on such free tours, or actually hosting them during their stay in the city:

> *"The (TCKTB) sometimes asks us to take care of their guests. We help them book free accommodation and send tour guides to take guests on daily excursions. Some of our personnel help with translation. These people are either key decision-makers, such as the members of the International Olympic Committee, or journalists, who are expected to share their experiences on their columns in return" [Istanbul Interview: 4].*

> *"The best and cheapest way to promote festivals and other special events is to organise press meetings or to distribute press releases... If you are aware of the reader profile of various magazines and newspapers, then it is even better. That way, you can send relevant information to specific media companies, for which the information suits their main viewpoint and principles" [Istanbul Interview: 5].*

Finally, the last three codes, namely '*IT marketing*', '*direct marketing*' and '*word-of-mouth marketing*', were attached to 3, 2 and 1 quotations respectively. The surprising finding from the Istanbul interviews was the relatively fewer statements on IT marketing in comparison to the high reoccurrence of the code in the analyses of Amsterdam and London. Moreover, although these three interviewees mentioned that their organisations have launched web sites, two of them added that their sites need to be improved to provide accurate and up to date information. The main reasons for the neglect of marketing through Internet, meantime, can be associated with the high costs of website designs and the lack of computer skills among personnel to manage organisational pages on the net. The importance of direct marketing, meantime, was raised regarding the promotion of Istanbul to tour operators in the USA and Europe. Since tourism organisations have minimal control over the execution of word-of-mouth marketing, one interviewee argued that sector stakeholders should co-operate to raise quality standards in tourism establishments, which may, then, lead to recommendations by existing visitors to their friends and relatives. Examples of these quotations are as follows:

> *"We do have a web page. But, to be honest, I am not convinced that it is useful as a marketing tool. Not just yet. That is mainly because we cannot get feedback from the users of the site. There is no doubt that it will have an enormous impact on the product buying process of potential customers in the future. At the moment, we lack financial ability to update the site continuously according to new technological developments. Therefore, it is just used as an information medium" [Istanbul Interview: 9].*

"If you target tour operators and travel agents, you need to go and knock on their door personally. The tourism attachés of the Ministry appointed in several countries of Europe and the US play an important role in that respect" [Istanbul Interview: 2].

To conclude, there are numerous marketing tools used by the case study cities. While London aims to revitalise its crises-struck tourism sector through promotional campaigns targeting domestic and leading visitor generator markets, the Amsterdam Tourism Board (VVV) concentrates on '*theme*' years in the process of replacing the deteriorated image with a positive one highlighting the cultural and heritage offers of the city. In the case of Istanbul, the recently introduced decentralisation of tourism development is yet to be accompanied by marketing campaigns designed to promote the city as a tourist product package on its own. While marketing activities embracing printed material, press releases, direct marketing, sales promotion, public relations and Internet sites are used by numerous tourism organisations, city-wide promotion covering the tools such as advertisement campaigns, attendance to travel fairs and the organisation of familiarisation tours are more expensive and expected to be orchestrated by the leading tourist authorities, who should co-operate with sector stakeholders for the appropriate representation of the cities and, also, for the creation of a one-voice approach.

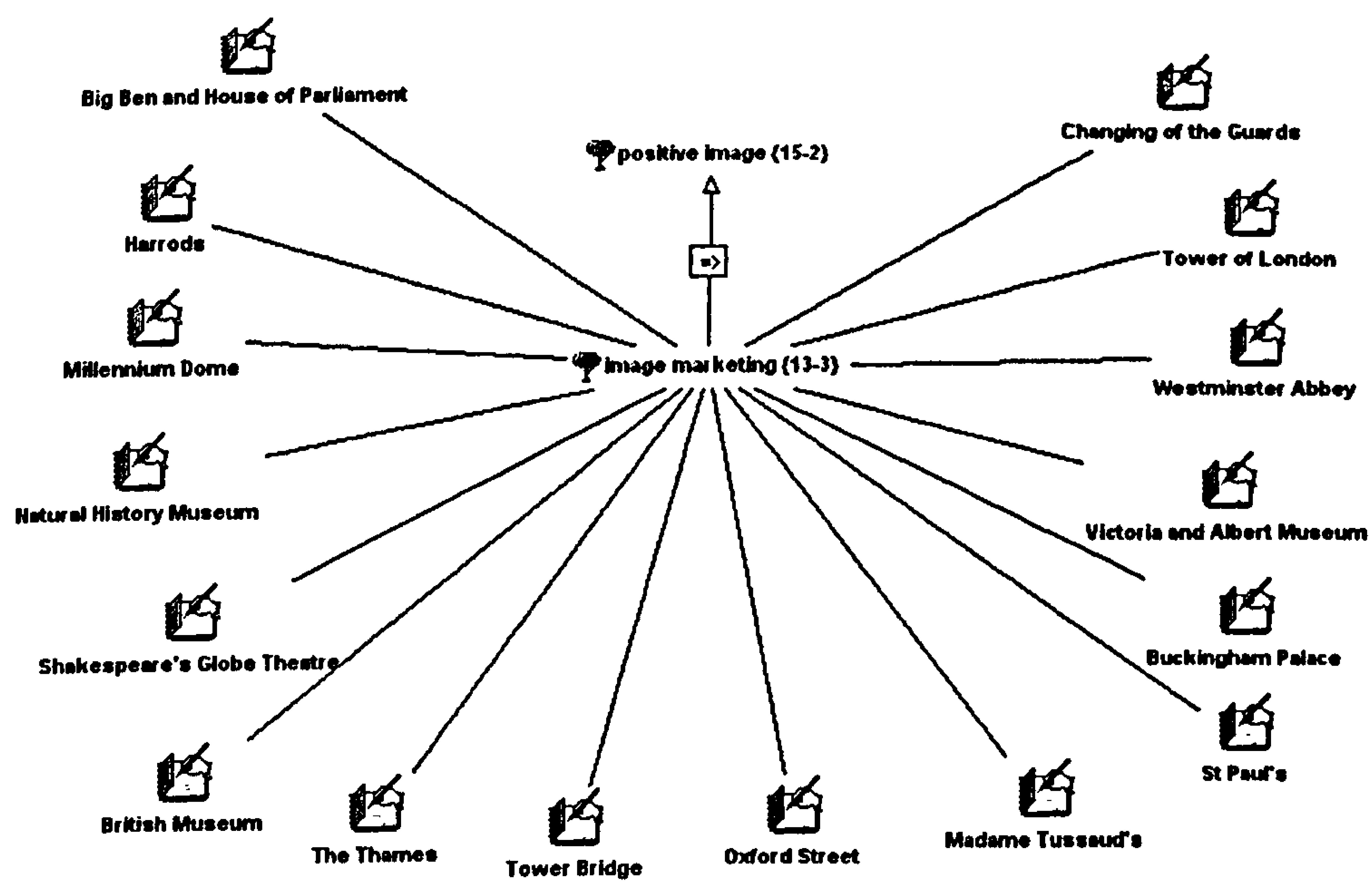
7.3.4. Image Marketing

The perceived images of the case study cities are discussed in Section 6.3, when the strengths and weaknesses of each city presented with the support of both secondary and primary data. In this section, therefore, the emphasis is put on the recent efforts of the leading tourism authorities to project their city images and to enhance their destination brands. In the case of London, for instance, the recent transformation of the tourism authorities with new organisation names –*i.e. BTA, ETC and LTB as VisitBritain, VisitEngland and Visit London respectively*- hints at the uniform '*destination brand*' approach targeted by the concerned authorities on a national scale. As stated in a recent report by the VLL (2004d), the change of the organisation's name was a strategic decision aiming to strengthen the image of London through the representation of the tourism sector under an easily recognised and simple logo. The same report also notes that the desirable image constituents of London are identified as '*diversity*'; '*creativity*'; '*evolution*' and; '*positive energy*'. When the marketing campaigns discussed in the previous sections are taken into account, it can be further argued that the VLL concentrates mainly on the diversity of the cultural, heritage, shopping and entertainment products and activities available in the city.

During the visits to the case study cities, printed promotional material were collected from a number of tourism organisations in order to assess the components of the tourist product packages used most by the sector stakeholders in their brochures and leaflets. This, as a result, was hoped to elucidate whether the image constituents identified by the leading tourism authorities are supported by individual tourism organisations in the process of creating a one-voice approach. In a total of 64 promotional publications, Big Ben and House of Parliament; Tower Bridge; St Paul's Cathedral; Buckingham Palace; the Trafalgar Square and; Tower of London are among the most used image icons indicating the strong heritage offer of the destination. Such landmark attractions are followed by the pictures of a red bus, a typical phone box and a policeman. While the shopping offer is represented mainly by Harrods and the Oxford Street, recently built attractions with contemporary architecture such as the Millennium Dome and the Canary Wharf, are used only by a small number of organisations. The entertainment component of the city, meantime, is often portrayed either with musical performance posters or with a picture of the Piccadilly Circus.

The interviewees of this research were also asked about the effective use of image in marketing London as a tourist destination. Figure 7.22 shows the most mentioned landmark attractions and other image components of the city. As in the analysis of promotional publications, the leading heritage attractions such as the House of Parliament, Tower of London, St Paul's Cathedral and Buckingham Palace, repeatedly occurred during the analysis of the interviews. The only other components of the overall product package, which were associated with the characteristic of the city as a shopping destination, were the Oxford Street and Harrods. The centre code '*image marketing*', meantime, embraces such general opinions and views related to selling London through emphasising its strong attributes.

Figure 7.22. Image Constituents of London



Among the 13 quotations attached to the code, five were about the need to form, use and deliver an appropriate image within a systematic planning process. Three interviewees further added that a positive image in marketing could only influence the decision-making process of potential visitors, if consistency in image-based messages is established on a long-term basis. While most interviewees referred to the uniqueness of London's tourism offer *–i.e. 15 quotations-*, one interviewee referred to the need to alter negative perceptions among potential visitors of the emerging tourist zones in the outer boroughs such as Southwark and East London. Although two interviewees supported to use of logos and slogans in image marketing, it should be noted that the current London logos were launched after the completion of the primary data collection. The recent logos introduced by the VLL splits the word '*London*' into its two syllables, where the letter O in both is replaced by icons representing alternative tourism forms and activities, such as a cup of tea and a pint of beer symbolising the variety in eating and drinking places in the city (*see Appendix 28 for the recent logos of the VLL*). Examples of the quotations are as follows:

> *"If you insist on using the same logo and other image themes, potential visitors would be familiar with them when they arrive in London. This is probably why the Big Apple campaign has had such an enormous impact on people. It has been kept long enough" [London Interview: 1].*

> *"If you are marketing London, you are clearly marketing an intangible image of the city. You need to analyse what it has to offer, its attractions, its accommodation offers, its heritage interests, its feel and atmosphere. You look at the raw material and try to deliver a message, which appeals to your target markets" [London Interview: 6].*

> *"The (VLL) really needs to have some continuity... They have worked on creating an image of London as a fashion centre. They have run advertising campaigns in New York for about four weeks and then stopped" [London Interview: 8].*

Unlike the positive image of London, Amsterdam not only suffers from its undesirable image as '*a sex and drugs destination for young visitors*', but also lacks a well-known landmark attraction to strengthen its tourism appeal in potential visitor markets. Dahles (1998) argues that the tourist attractions of the city are diffuse and difficult to envision, hence fail to become internationally known landmarks. Therefore, as mentioned in the previous sections, the Amsterdam Tourist Board (VVV) concentrates on well-known Dutch artists, such as Van Gogh and Rembrandt, and special '*theme*' years in order to transform the '*tolerant city*' image into a cultural one. The organisation aims to build a new destination brand based on the marketing mottos '*quality*', '*uniqueness*' and '*sustainability*' and through highlighting the variety of cultural activities (VVV, 2000a and 2002). As discussed above, the primary aim of the campaign '*Amsterdam World City*', for example, is to assure potential visitors about the safety and cleanliness of the city for families and elderly people, and to inform them about the diversity of shopping, entertainment and recreational activities as well as cultural events and museums.

Nearly 70 brochures and leaflets collected from the Amsterdam-based tourism organisations during the conduction of participant observation suggest a number of divergent image icons used in promotional material. Although the traditional Amsterdam houses along the canals are used most, they are followed by the pictures of clogs, windmills, cheese and tulips, which are arguably the icons mainly associated with the national tourism offer of the Netherlands rather than solely with the one of Amsterdam. Concentration on intangible aspects of the city, such as the photos of Van Gogh and Rembrandt and the use of the XXX sign, are also evident. While the Skinny Bridge is the only *'Amsterdam site'* often covered by tourism organisations, the major heritage attractions such as the Royal Palace, the Rijksmuseum and the New Church rarely appears in the collected city-wide guides and leaflets. The '*entertaining and fun*' image of the city, however, is often portrayed in the pictures from Leidsplein and the Red Light District.

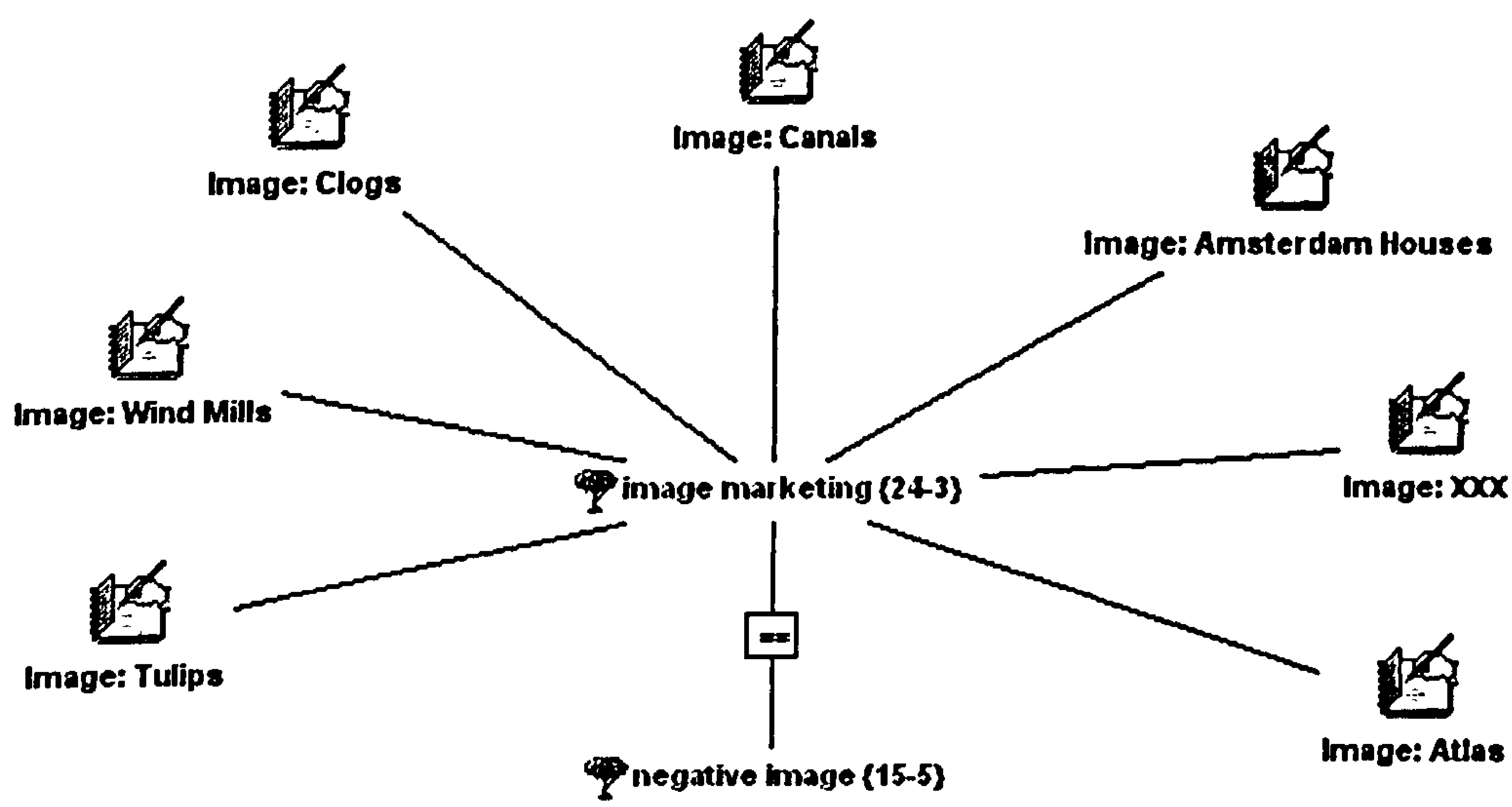
Among so-called image constituents of the city, the interviewees also mentioned the Amsterdam houses and the canals most (*see Figure 7.23*). While the Atlas figure and the XXX sign were arguably more specific to Amsterdam than national symbols like clogs, wind mills and tulips, it is important to note that not all quotations indicating such symbols were supportive of their use when marketing the city as a tourist package. In fact, 24 quotations assembled under the code '*image marketing*' denotes the importance of the subject as perceived by the interviewees and consists of various issues concerning how the city is perceived by potential and existing visitors and, how its image is projected in marketing activities by the leading tourism authorities. While most interviewees referred to the '*tolerant (sex and drugs)*' image of the city *–i.e. 15 quotations-* five interviewees argued that the perceived negative image of Amsterdam improves remarkably during and after stay.

4 quotations attached to the code were regarding long periods of time required for the transformation of a negative image into a positive one. One interviewee further argued that tourism authorities cannot create images from scratch, but can only try to modify the already well-established negative perceptions and attitudes of potential visitors by focusing on the strengths of the tourism offer. Although 6 interviewees mentioned that they were aware of the VVV's attempts to promote Amsterdam as a cultural destination, they were concerned of the lack of a landmark attraction *–i.e. 2 quotations-* and inefficient levels of co-operation among sector stakeholders to overcome the existing image problem *–i.e. 2 quotations-*.. Two interviewees, meantime, supported the use of logos when executing promotional campaigns in

the international tourism market, but were sceptical about the ambiguity of the existing logos for potential foreign visitors. Moreover, the national symbols such as tulips and windmills were considered to conceal the diversity of the cultural tourism products that Amsterdam can offer:

> *"They still use tulips and windmills in visitor brochures. But they are not only associated with Amsterdam. The Netherlands is known by these logos. Amsterdam is the gateway to the Netherlands and it is an important part of the national tourism industry. But, there is more to it. It is a lively city. We have the museums, which have the collections of Rembrandt and Van Gogh... Therefore, they need to make sure that it is a place for culture and arts as well as windmills and tulips" [Amsterdam Interview: 16].*

Figure 7.23. Image Constituents of Amsterdam



> *"The worst thing about Amsterdam is that its negative image is so widely spread that it would take years to transform it into another image" [Amsterdam Interview: 1].*

> *"The (VVV) has been working on a strategic marketing plan, which focuses on the change of the city's image. It is a well-known fact that Amsterdam suffers from its negative image as a place for sex and drugs. That is clearly stimulated by the well-known tolerance of the city and its authorities" [Amsterdam Interview: 13].*

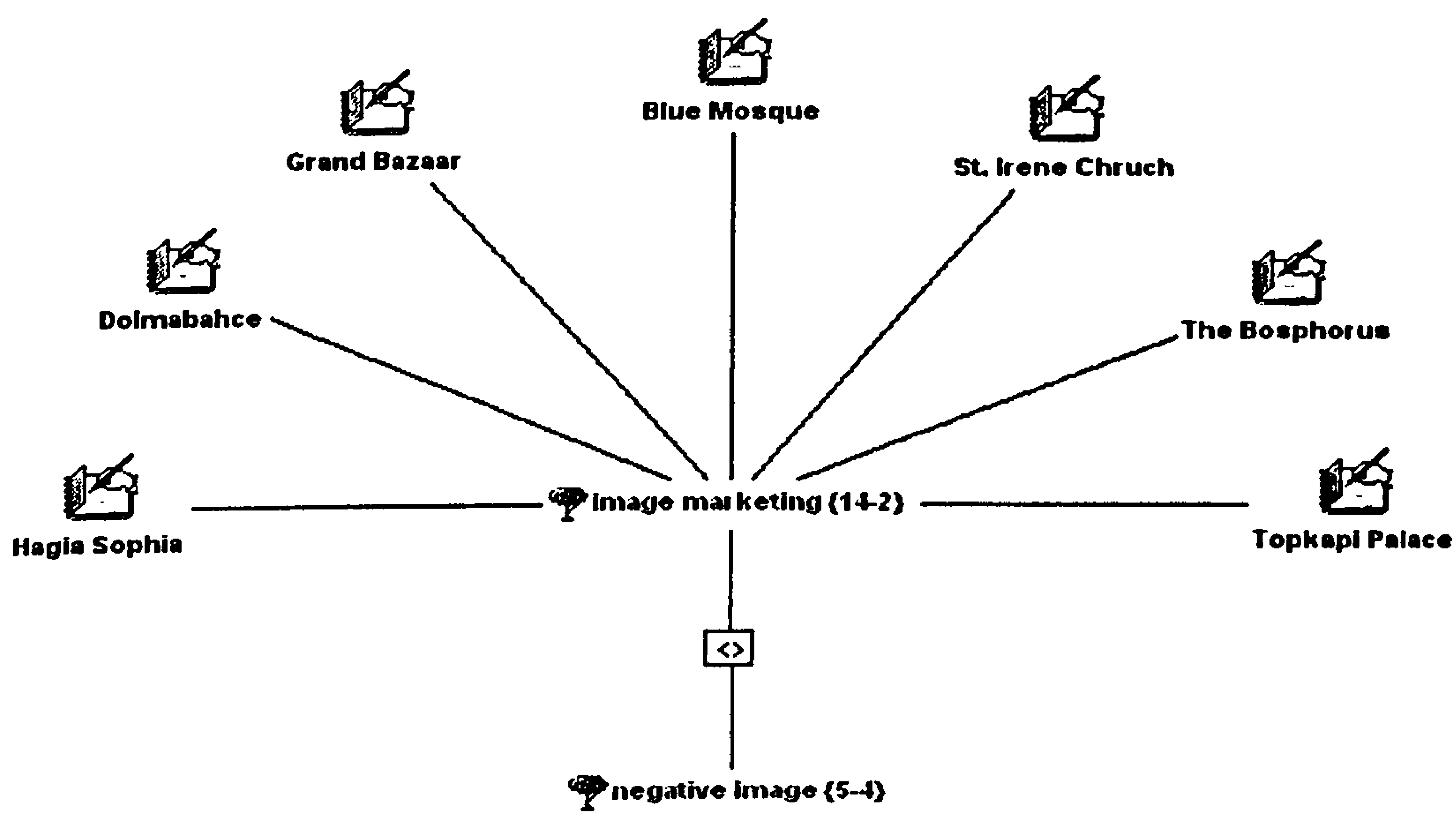
Finally, in Istanbul, it is hard to assess which strong aspects of the city that the authorities highlight in their marketing efforts due mainly to the lack of a marketing plan outlining branding and image marketing strategies. The recent tourism development plan introduced by the current government initiates several projects on product development and improvement in the city. However, since the plan has no particular section on image marketing, the portrayed image constituents can only be assumed by analysing the plan aims emphasising the importance of the Historic Peninsula, thus can be argued to revolve around the heritage and cultural offers of the tourism sector. In fact, various promotional publications of the Ministry of Culture and Tourism (TCKTB) and other tourism organisations often draw attention to the message of Istanbul as an oriental, yet modern city. The geographical location of the city between Europe and Asia is also repeatedly used in slogans including: '*Istanbul: Where the Continents Meet*' and '*Istanbul: Past and Present, East and West, Tradition and Change*' (ICVB, 2000; IOBC, 2003).

When over 80 brochures and leaflets collected during the primary data collection are analysed, it is seen that the most used image constituents of Istanbul are a view from the Bosphorus Strait and the Bosphorus Bridge, which arguably reveal the modernity of the city and its geographical location. These were followed by the pictures of landmark attractions including Blue Mosque; Hagia Sophia Church; the Topkapi and Dolmabahce Palaces; the Galata Tower; the Maiden Tower and; the Basilica Cisterns. The shopping offer is repeatedly portrayed with both the historic Grand Bazaar and the contemporary shopping malls. Unlike the other case study cities, the pictures of various meals representing the richness of the Turkish cuisine and numerous entertainment zones such as the Taksim Square and Beyoglu frequently appear in such publications. Tulips and belly-dancers are also used despite the fact that they are not specifically associated with the tourism offer of Istanbul, but the one of the whole country. The figures of tulips and minarets are also evident in the logos of tourism organisations. The recently introduced '*Turkey*' logo by the TCKTB also embraces a tulip drawing and is used across the country by a range of tourism organisations (*see Appendix 30*).

The interview findings from Istanbul on image marketing is illustrated in Figure 7.24, which covers the most mentioned landmark attractions as the Bosphorus Bridge, Blue Mosque, Hagia Sophia Church, St Irene Church, the Topkapi and Dolmabahce Palaces and the Grand Bazaar. These results arguably suggest that there is a need to focus on the strong heritage offer of the city in image marketing. Although the code '*image marketing*' is attached to 14 quotations, most of the statements were regarding the neglect of the image problems of both the city and the country, as they were argued to influence each other, by the concerned authorities. Those 5 quotations linked with the code '*negative image*' were on the perceived unsafe and chaotic destination image of the city. Other statements, meantime, dealt with the issues ranging from the lack of a systematic and consistent marketing plan to the need to differentiate the product offer of Istanbul from the ones of coastal resorts in the country. Three interviewees criticised the centralised marketing efforts of the TCKTB, which leads to the image formation of the country appealing only to mass tourism market and ignoring the alternative tourist products that Istanbul can offer to specialised market segments as in culture and heritage tourism. While 2 interviewees argued that culture and heritage should be placed at the centre of image marketing activities, the message that Istanbul is an oriental, but modern city, was found appropriate to attract attention among potential visitors by 3 interviewees:

> *"It seems that we are still unsure of what our image is. Is Istanbul an oriental destination or the one, where the Western culture values are adapted by local people? Is it a culture or heritage destination? Is it a destination to be sold on its own, or can it be sold within the same package with sea-sun-sand destinations?... Therefore, the primary task should be to decide what the priorities should be and then to focus on such priorities based on the strengths of the city" [Istanbul Interview: 15].*

Figure 7.24. Image Constituents of Istanbul



> *"We are still put in the same league with those countries like Morocco and Algeria in the European market, where tour operators find it easy to sell Istanbul as an oriental destination... That is ok to a certain extent, as people would be more attracted to what they do not have in their own country. But, we have much more to offer. The problem is that we cannot get our voice heard, as the Ministry lacks a strategic and professional approach to deal with such image matters" [Istanbul Interview: 9].*

"Turkey still has an image problem, which is reflected on Istanbul. It is known as an unsafe and chaotic place. This problem is yet to cause major fluctuations in visitor arrivals. However, unless necessary precautions are taken, it may hamper the sector in the future. Image is not something you can change over night" [Istanbul Interview: 2].

7.3.5. Marketing Research

Contemporary marketing theories suggest that the needs, wants and expectations of both potential and existing visitors should be placed at the centre of destination marketing (Gilbert and Bailey, 1990). Therefore, marketing research is often conducted by leading tourism authorities to identify such valuable information as: the types of visitors; their buying habits in the destination; their purpose of visit; their origin; their use of different accommodation establishments and transportation modes; their perceived image of the destination; their likes and dislikes; the duration of stay and; the concentration of visitors in specific tourist seasons and tourist zones (Buhalis, 2000). Market research is also crucial for the establishment of customer databases for relationship marketing and for the appropriate use of relevant marketing tools suiting the characteristics of demand.

In all of the case study cities, tourism research is carried out by the national statistics offices and is supported by the national tourism authorities. In the Netherlands, the international tourism surveys are conducted by the Netherlands Board of Tourism and Conventions (NBTC) in co-operation with the Central Bureau of Statistics (Centraal Bureau voor de Statistiek), while the VVV appoints consultancy firms for various destination-based and purpose-designed tourism research. Similarly, in the UK, VisitBritain co-operates with the Office for National Statistics for the collection of tourism data. In Turkey, the National Institute of Statistics (Devlet Istatistik Enstitusu) is the main authority and collaborates with the TCKTB for its tourism-related surveys. However, as most of the above-discussed sections indicate, the scope of tourism statistics is limited in Istanbul and lags behind the other case studies, especially in respect to domestic tourism. Furthermore, while both the VVV and VLL have recently initiated projects to create customer databases for Amsterdam and London respectively through the use of their official websites, Istanbul lacks a website of its own, while the official site of the Ministry does not include online registration for site users to collect feedback on potential visitors and to establish a similar database.

During the analysis of the interview results, the code '*marketing research*' was created to appraise how sector stakeholders evaluate tourism intelligence and data collection activities in their cities as well as the accuracy and reliability of research findings. The code was attached to 15 quotations from the findings of Amsterdam and London. While the interviewees of these cities acknowledged the importance of conducting research when preparing development and marketing plans, most of them confirmed that their organisations run regular surveys and questionnaires in order to investigate their individual customer profiles. Most interviewees cited up to date results of citywide surveys and research when discussing various topics, hence indicating that they keep track of most recent characteristics of both demand and supply from such surveys published by the local and national authorities. In Istanbul, on the other hand, the code was attached to 8 quotations. While only 4 interviewees mentioned that their organisations carry out regular customer surveys, another 4 interviewees suggested that the data collection methods used currently by the national authorities should be revised to expand the scope of tourism statistics. One interviewee further argued that the Ministry should immediately conduct extensive visitor surveys and develop long-term marketing plans according to its results. Examples of the quotations from all three cities are as follows:

> *"First of all, the Ministry should urgently employ an extensive market survey, in which both visitor characteristics and product analysis are investigated. Based upon the findings of such a survey, they should determine which target markets should be approached by using which promotion tools. But most importantly, they need to use the results to envision a long-term strategy and to deliver its short-term action points" [Istanbul Interview: 15].*

> *"If the aim is to make choices, you need to carry out some analysis to see how tourism is developing; what the growing markets are; which markets are declining and so on... That is why we do a lot of research to improve our position in the market" [Amsterdam Interview: 2].*

> *"Research is the qualitative side of marketing. You need to know whether people are satisfied with your offer... We have recently designed a questionnaire asking people how they value us. This research is important, because by looking at its results, we aim to improve our product in a way to suit our visitors' needs and expectations" [London Interview: 2].*

7.6. Conclusion

This chapter investigated the tourism management networks of the case study cities and the marketing efforts of the leading tourism authorities in each of them. Given the extensive variety of tourist service providers and organisations in urban areas, it can be argued that it is difficult to analyse all of tourism organisations operating in city destinations. However, the findings of this research suggest that establishing partnerships stimulate shared and harmonised views in destinations, and help them to induce a one-voice approach in marketing efforts. Since tourism cannot be isolated from other urban functions and economic systems, such partnerships encourage co-operative decision-making not only among sector stakeholders, but also in joint work with other key organisations of an urban system, including the departments of security, health, education and transportation.

In order to overcome the duplication of efforts in the tourism management network, the Mayor of London has been challenging the long-lasting lack of a strategic leadership and encourages sector stakeholders to take part in the preparation of tourism strategic plans. Similarly, VisitBritain and Visit London (VLL) put a great emphasis on the importance of partnerships in destination marketing. In Amsterdam, meantime, despite the recent transformation of the Netherlands Board of Tourism and Conventions and the consecutive marketing plans produced by the Amsterdam Tourist Board (VVV), it is the Government, whose support, both financially and strategically, is considered imperative to complete the tourism network. As frequently mentioned by the interviewees, public authorities, which have been concentrating more on recreation than tourism, are the only missing elements for the improvement of an already established collaborative approach among the private sector organisations.

Finally, the interview findings on the tourism management network in Istanbul confirm the arguments raised during the analysis of the leading tourism authorities and their objectives and activities. In summary, the belated shift from central tourism planning to regional and local one needs to be expanded across the country with the Ministry of Culture and Tourism (TCKTB) diverting some of its responsibilities to local tourism directorates or municipalities. Although Istanbul has been selected as the pilot city in Turkey, for which a destination-based planning and marketing will be pursued by the TCKTB, the lack of co-operation among sector stakeholders and their contribution to the policy-making procedure remain as impeding factors for the establishment of an integrated approach toward tourism development.

The competitiveness, market segments, promotion, image marketing and market research activities of the case study cities were also discussed in the above sections. It can be argued that each of the case study cities combine a different set of products and services in their offer and appeal to diverse market segments. While London is the leading urban destination not only in Europe, but also in the world, Amsterdam and Istanbul, as destinations at different phases of their life cycle, face tougher competition than ever before due to several factors, which include an increasing number of destinations investing in tourism development; technological developments making remote locations accessible places; changing characteristics of tourism demand with more free time and holiday alternatives available for potential visitors and; the recent phenomena of collaboration through sector-wide partnerships making tourism management networks cost and time effective in their systematic approach to marketing.

The sections on market segmentation indicated that city destinations often report larger shares of foreign visitors in their tourism statistics, as their popularity increases in the international market. Yet, it is often much easier to operate on domestic markets, since it is both cheaper to conduct marketing activities and also more likely to inform potential visitors on the opportunities that a city offers. As shown in the case of London, domestic market also has a considerable potential in substituting international ones during crises times. Nevertheless, the cities of the developing world, such as Istanbul, often seem to neglect the economic impact of citizens travelling domestically on the tourism sector, while international arrivals receive greater attention due to the ostensible concerns on increasing tourism income through expenditures made by foreign currencies.

The analysis of the case study cities' visitor profiles from the perspective of geographic segmentation, provided further insight into the evident influence of the wealthy nations in generating demand. The visitors from the USA and the Western Europe were at the top of the major market segments list in all cases albeit with differences in order of importance. While London and Amsterdam seem to benefit from their location in West Europe surrounded by other members of the developed world, the neighbouring countries of Turkey, especially at the Eastern border, are yet to produce a notable demand potential. Although the distribution of visitors according to the generator markets portrays a relatively balanced picture in Istanbul compared to US-dependent London and UK-dependent Amsterdam, the need to analyse the characteristics of each market segment and to identify target markets for promotional purposes is yet to be fulfilled by the concerned authorities.

The case study cities were also found to use numerous marketing tools to strengthen their position in the international and domestic tourism markets. While London aims to revitalise its crises-struck tourism sector through promotional campaigns targeting domestic and leading visitor generator markets, the Amsterdam Tourism Board (VVV) concentrates on '*theme*' years in the process of replacing the deteriorated image with a positive one highlighting the cultural and heritage offers of the city. In the case of Istanbul, the recently introduced decentralisation of tourism development is yet to be accompanied by tailor-made marketing campaigns to promote the city as a tourist product package on its own. Istanbul has also lags behind London and Amsterdam with regard to the recent efforts of the VLL and VVV to establish '*destination brands*' through image marketing and the support of exclusive research activities providing valuable feedback to product development and promotion policies.

CHAPTER 8. CONCLUSION AND DISCUSSIONS: THE WAY FORWARD

8.1. Introduction

As discussed in Chapters 1 and 5, this research aims to develop a marketing model for city destinations: by concentrating on the marketing aspect of urban tourism and; by taking lessons from the experiences of the case study destinations. In fact, the initial desk research phase of the investigation indicated that there is a gap in the existing literature with regard to a universal marketing process to be followed when marketing urban areas as tourist destinations. In order to develop such a model, various aspects of the tourism sector in all three case studies were examined along with the life cycle, SWOT and carrying capacity analyses.

There is no doubt that each urban area is a unique tourist product package, hence requiring tailor-made plans and policies for tourism development and marketing. However, the aim of this research was to find similarities with regard to the marketing activities of the case study cities, which may help city marketers and decision makers to identify several factors as the priorities and prerequisites of their strategic plans when selling city destinations. The following sections focus on such similarities within the framework of a marketing model. While the knowledge- and case-based model has emerged through the analysis of the key issues influencing the tourism marketing process of all three case studies, the consecutive phases of the model are then applied to the tourism sector of Istanbul, with suggestions for marketing strategies for the city.

Before the following sections are discussed in detail, it is important to note that the proposed model is not static, but dynamic. It would serve mainly in the understanding of the product packages of urban areas as marketable commodities and provides a detailed approach to the components of city destination marketing in the context of relationships between a given city and its visitors, and also among the key decision makers of the tourism management network. The model cannot clearly fit into the specific and distinguishing characteristics of individual cities. Therefore, any internal or external factor affecting the sector may result in the revision of the model components, and the expansion of their scope by considering emerging marketing concepts and applications.

In the same way, the suggestions made for the optimal marketing of Istanbul as a tourist destination were only appropriate at the time of writing this thesis and, cannot be taken as imperishable recommendations for future problem-solving and decision-making mechanisms. The tourism authorities of the city should employ on-going assessment of the dynamic characteristics of both the urban system and the tourism sector for effective tourism development and marketing strategies.

8.2. A Marketing Model for City Destinations

As explained in Chapter 5, forming a conceptual framework on marketing city destinations and identifying the key external and internal environmental factors influencing the marketing activities of urban destinations are crucial in the process of model development. While a conceptual framework built mainly through the analysis of existing literature help highlight the focus of the research, it also constructs the basis of the model developed according to primary data findings.

In their early study, Ashworth and Voogd (1988) argued that the successful functioning of any urban activity depends to a considerable extent upon the market context in which they are set, and that a "*geographical marketing mix*" for city destinations consists of: financial; organisational; promotional and; spatio-functional measures. The authors further stated that the application and the appropriate combination of these measures largely determine the scope and effectiveness of city marketing. Many other researchers also emphasised the importance of similar issues with regard to destination marketing and concentrated on similar internal and external environment factors. In their empirical research conducted in several destinations of the United States of America, Hawes et al. (1991), for instance, focused on product, promotion and management aspects of the case studies as internal environment factors. King (2002), meantime, stressed the importance of changing market trends and competition in addition to such internal factors in his study assessing how destination marketing organizations should be structured. Similarly, Ritchie and Crouch (2003) investigate competitive destinations from the perspective of sustainable tourism development and mainly focus on product and management issues as internal environment factors, and competition as an external environment factor.

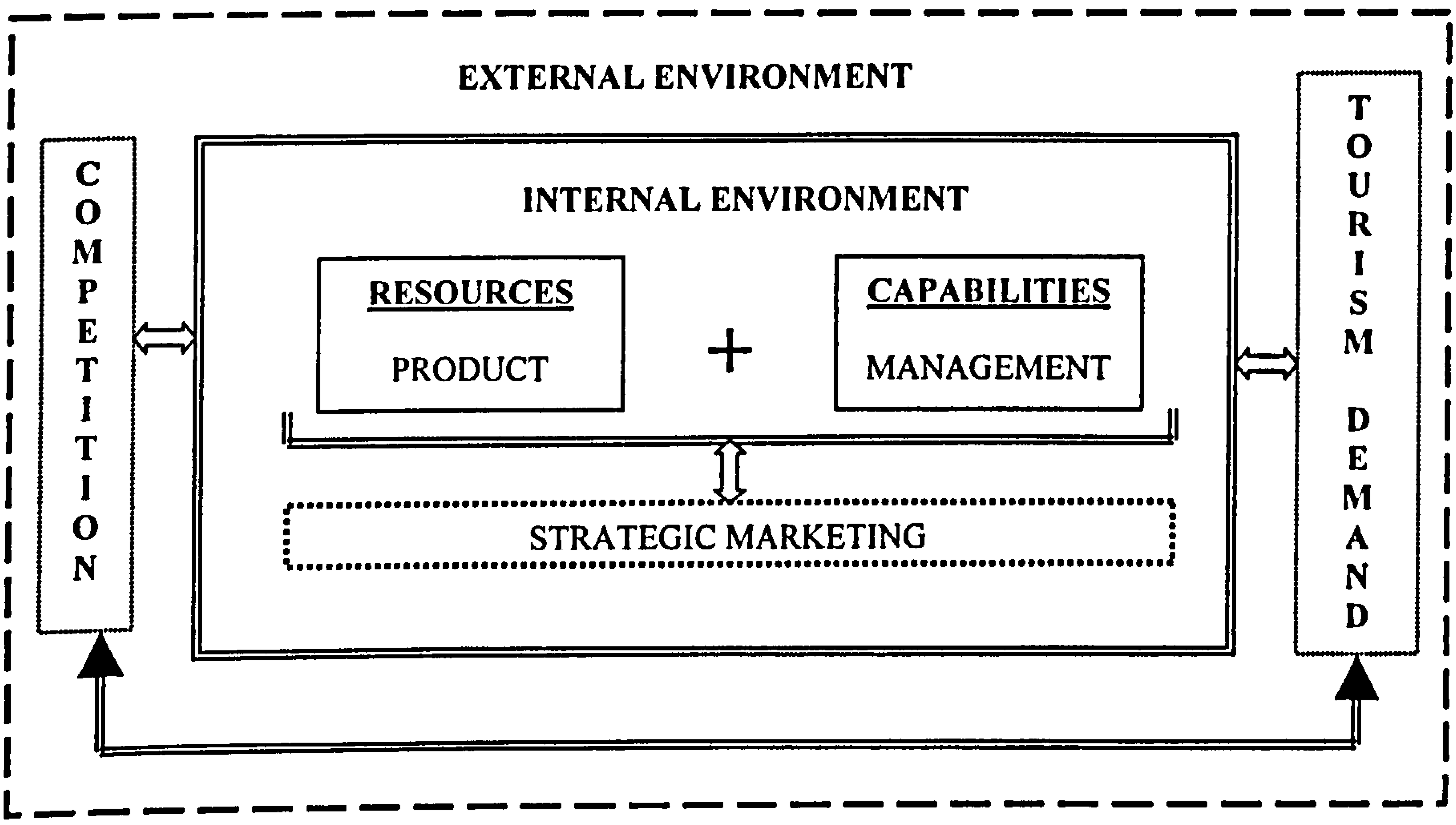
In light of such existing research, it can be argued that collective decision making regarding destination marketing and management relies on the relationship between the level of comprehensiveness of a strategic planning process orchestrated by leading authorities and the impacts of the internal and external environment of the destination. As Soteriou and Roberts (1998) argue, such relationship revolves around the capability of the decision-makers for the successful marketing and management of the product concerned and the complexity, volatility and hostility of the external environment factors that either reinforce or undermine the employment of the decision-making and planning process.

Similarly, Melian-Gonzales and Garcia-Falcon (2003) state that, the competitive potential of the tourism sector in a given destination can be determined by the resource-based theory. While tourist destinations are argued to possess certain resources and/or capabilities, which enable them to develop tourism, the resource-based model involves the analysis of such resources and capabilities as internal environment factors. From the perspective of tourist destinations, the authors further suggest that resources are the destination product itself embracing both primary and secondary components of the overall package offer ranging from natural resources to cultural assets. More specifically, the concept of "*resource*" is considered to cover any input that is found in a tourist destination and is available for organizations to use in a specific economic activity. In contrast with the resource concept, however, the capabilities of the tourist destination is found to be the skills in integrating offer packages with a view to achieving a desired result of tourism development and marketing. Therefore, the concept of "*capability*" refers to the management of the destination either in a hierarchical format or in an integrated manner. The authors give the ability of a destination's public administration to coordinate different economic and social agents, which play a part in tourism, or the capacity for innovation as examples of a destination capability.

From the synthesis of such existing research, the conceptual framework shown in Figure 8.1. is developed in line with the main objectives of this research. As in any strategic decision making process, the marketing of city destinations is argued to be influenced by both internal and external environment factors. According to the resource-based theory, the internal environment is then divided into two categories, namely resources and capabilities, both of which influence the strategic marketing decisions approved by all sector stakeholders in an ideal destination environment. As suggested by Melian-Gonzales and Garcia-Falcon (2003), resources indicate the concerned city destination as a marketable package offer. Under the resources, therefore, one can refer to: tourist attractions; tourism services and facilities; other tourism suprastructure attributes including labour force and; urban infrastructure crucial for tourism development. The strengths, weaknesses, quality and quantity of these factors influence the market potential and competitiveness of tourist destinations.

Destination capability, meantime, is the operational and administrative structure of tourism marketing in cities. Financial resources available for marketing activities; the efforts and success of leading tourist authorities; sector- and city-wide co-operation and tourism partnerships; and overall urban management and development strategies are assessed from the perspective of a marketing managerial process of maintaining an optimal fit between the deployment of destination resources and the needs and wants of target markets. Clearly, the demand aspect is an external environment factor in this figure, since tourist destinations cannot control the changes arising in potential and existing markets. Similarly, competition is also beyond the destination's control. Although, in the figure, tourism demand and competition are shown as the only external environment factors concerning the main objectives of this research, it should be noted that there may be manifold external conditions and forces affecting not only the tourist destination in question, but also its competitors and target markets. As Chon and Olsen (1990) and Yavuz et al. (2005) note, the external environment may consist of economic, environment, technological, socio-cultural, legal and political dimensions, which do not always cause immediate effects in the tourism operating environment of destinations nor can be controlled through strategic actions executed by key decision-makers and planners. Therefore, destination marketers and planners should monitor and assess any forces and conditions emerging in the global business markets on a macro level, and in their operational tourism environment on a micro level.

Figure 8.1. Conceptual Framework of City Marketing



Before the primary data analysis is assesed to develop a marketing model in the following sections, it is important to note that destination marketers and planners should focus on the relationships between the internal and external factors shown above and relate all the factors in the process toward exhaustive decision making, implementation and control. Multidimensional analysis of this conceptual framework is especially crucial for city destinations, since marketing their offer requires not only the efficient combination of various tourist products and services suiting the needs of manifold market segments, but also co-operation among key stakeholders and other urban authorities. However, due to the limitations of this research, the marketing model suggested below consists of the key terms concerning the controllable supply elements of tourism and refers to the internal environment factors of Figure 8.1. The model, therefore, is divided into three sections *-i.e. destination product, tourism management network and promotion-*, which together form the sequential and interrelated phases of a systematic marketing process. Any impact of competition and tourism demand emerged during the primary data analysis, meantime, is associated with one of these three internal environment groups according to the suggestions made by the interviewees as to where appropriate action is considered necessary.

8.2.1. City Destination Product

If marketing is to stimulate consumption of what is produced and to make the product offer suit the consumers' needs and preferences, the initial task of city marketers should be to determine what their tourist product offer is and whether it appeals to target markets or not. As mentioned in Chapter 2, city destinations embrace many services and products within their product package. While some of the primary and secondary elements of a tourist product, such as major attractions with a strong pull-in effect on visitors and the provision of hotels, restaurants, and alternative transport models, are inevitable for destination development, increasing and on-going competition between tourist destinations in the marketplace forces city authorities and marketers to improve their products in order to expand their target group and to attract new potential market segments. Besides, as a component of the internal environment, the destination product should be evaluated as a marketable combination of resources, which consists not only of tourism products and services, but also other urban facilities and functions necessary for the effective functioning of the tourism sector.

In order to assess which aspects of a destination product that the interviewees emphasised most during the primary data collection, the codes regarding the tourist offer of Amsterdam, Istanbul and London are gathered in Table 8.1, in which each code is listed according to the number of reoccurrence throughout the analysis of all interviews. During the primary data analysis, the list of the "*product-related*" codes has indicated that they mainly refer to three issues: the tourist offer components of the selected cities; their strong aspects as tourist destinations, and; the negative aspects, which may hamper the growth of tourism in the cities unless appropriate precautions are foreseen and necessary actions are taken. As the table below shows, the first group of the codes cover the primary elements of the tourist product as well as the secondary and supplementary ones such as accommodation and urban infrastructure. It is important to note that, some of these "*key terms*" embrace more than one code used during the analysis of the interviews, for the simplification purposes aiming to highlight main aspects of the tourism offer. For instance, while the codes "*accommodation*" and "*lack of accommodation*" are both used during the interview analysis, the number of reoccurrences of these two codes are gathered under the single term "*accommodation*" in order to better illustrate the importance paid to the subject by the interviewees.

Besides, one should not forget that the terms listed in the table are not the only components that a city destination should have in order to develop tourism. These terms were used by the interviewees with reference to their importance in marketing the selected cities as tourist destinations. From this perspective, it is possible to consider tourism supra-structure and urban infrastructure as the two crucial and interrelated components of a city destination product, which may be differentiated from the competitors' offers through focusing on either heritage sites and buildings or its shopping opportunities depending on the strengths of the destination and the needs and wants of selected target markets. For example, as can be seen in the table, while it is "*arts/culture/entertainment*" which is mentioned most by the Amsterdam interviewees, the findings from Istanbul suggest that it is the *"heritage"* offer, which should be placed at the centre of the marketing activities of the city.

Table 8.1. Reoccurrence of the Codes Related to *"Destination Product"*

Product Codes	*AMSTERDAM*	*LONDON*	*ISTANBUL*	*TOTAL*
Tourist Offer Components				
• *Arts/Culture/Entertainment*	*31*	*26*	*12*	*69*
• *Heritage*	*13*	*18*	*27*	*58*
• *Accommodation*	*13*	*28*	*12*	*53*
• *Special Events*	*9*	*27*	*17*	*53*
• *Urban Infrastructure*	*6*	*25*	*16*	*47*
• *Landmarks*	*14*	*15*	*15*	*44*
• *Shopping*	*8*	*13*	*8*	*29*
Strong Aspects				
• *Product Development*	*21*	*28*	*35*	*84*
• *Product Package*	*23*	*29*	*17*	*69*
• *Accessibility*	*9*	*17*	*19*	*45*
• *Uniqueness*	*8*	*11*	*13*	*32*
• *Gateway Position*	*13*	*11*	*8*	*32*
• *Quality*	*8*	*11*	*10*	*29*
• *Diversity*	*n/a*	*15*	*n/a*	*15*
Negative Aspects				
• *Traffic Congestion*	*17*	*13*	*13*	*43*
• *Crowding*	*11*	*7*	*7*	*25*
• *Safety*	*10*	*6*	*n/a*	*16*

It can be argued that it is the second and third rows of the table, where the strong and negative aspects of the case study cities are shown, which distinguish what makes a city more competitive and which characteristics of the tourist offer make the destination a "*winner*" or a "*loser*". Again, the number of codes created during the data analysis was not limited to the terms used in the table regarding the strengths and weaknesses of the case study cities. When selecting the terms, the attention is paid to the codes, which occurred in the findings from all the cities, while the ones specific to individual cities, such as the code "*Turkish cuisine*" shown as a strong aspect of Istanbul, are eliminated with the aim of forming a uniform model applicable to all city destinations.

As the most mentioned strong aspect in the table, the term ***"product development"*** indicates that the success of city destinations in the fierce competition environment relies on an on-going assessment of the product package on offer and its upgrading and modification according to the changing market trends and expectations. There is no doubt that the commitment of tourism organisations and local planners to marketing their city product would result in increased market share, if planned and recruited marketing efforts fit the characteristics of both the product package on offer and demand. Once the success is achieved, a challenging task for decision-makers and city marketers becomes to retain the product attractive to both existing and targeted market segments. Consequently, the key players may involve in strategies to upgrade the overall urban network. Improvements made to urban infrastructure, restrictions on urban land-use, introduction of provincial taxes on various economic outlets and initiatives provided to encourage international organisations to locate their headquarters in the city, are all urban-wide decisions, which would eventually have bounce-back effects on the number of visitors travelling into the city.

Product development cannot be associated solely with the destinations, which have already gained an advantageous position in the tourism market and aim to attract different market segments with new offers in their package. New comer destinations also need to concentrate on either packaging already existing potential tourism offers as marketable commodities or to add new facilities and services to create a product package appealing to diverse market segments. For example, the interview results suggest that while Amsterdam aims to re-image itself with the development and marketing of more cultural activities for families, it is important for Istanbul to host the Olympic Games to find a place for the city in the international tourism map.

While such development strategies consider the needs of locals and scarce physical resources of urban environments as well as those of the tourism sector, the strategies could also be solely tourism-oriented. As suggested by the interviewees of this research, building new accommodation outlets, expanding the offer with a new conference centre, improving the public transport network with new lines and stations and encouraging private sector investment in the attraction sector can all be considered as efforts to keep pace with fast changing demand and supply trends. Technological developments also provide city authorities with new opportunities to manage and market their destinations. Product development, therefore, is crucial for a city destination, which would achieve optimal benefits through reaching wider market segments with alternative offers, while encouraging repeat visitors to experience another sight of the differentiated product range.

Product development is clearly related to the second most mentioned strong aspect: ***"product package"***. As mentioned frequently throughout this thesis, the very nature of urban areas as tourist destinations rests in their capacity to aggregate various tourism forms in the same product cluster. Major city destinations can embrace diverse visitor attractions, facilities and services within their geographical boundaries, and can target numerous market segments. The benefits gained by the *"product package"* concept is explained with this multi-bought and multi-sold characteristic of urban destinations, where decision-makers target: shoppers; cultural visitors; visitors on education trips; business visitors; short-break trippers; domestic visitors or; international visitors for the consumption of: landmark attractions; restaurants; accommodation outlets; shopping facilities; cultural establishments; conference centres; education institutes and; transportation. Different market segments can either be targeted in different seasons to balance visitor fluctuations across the year or at the same time to foster rapid growth. Although used only during the analysis of the London interviews, the code ***"diversity"*** reveals how city destinations can be more successful in bringing different product components in the same package and in attracting different market segments. However, the case of London also indicates that whatever the target segment is, the successful tourism planning and marketing require the integration of such *"diversity"* in tourism into an overall urban economic structure. While tourism should co-exist with other urban services and economic industries of a given city, solely tourism-based development and regeneration schemes should be avoided in urban areas due mainly to external factors bearing adverse effects on the sector with the potential of sudden decreases in demand during crises periods.

The task for decision-makers and city marketers is, therefore, to identify the strengths and weaknesses of a city destination as a marketable commodity, and then to compare the results of an analysis with the needs and expectations of various market segments in the process of both the selection of target markets, and the appropriate packaging and presentation of diverse offers to specific segments. Whichever tourism development form is selected *–i.e. heritage tourism, cruise tourism or MICE tourism-*, the "*accessibility*" of the destination to potential visitor generators should be enhanced by initiating development and upgrading projects in alternative transportation means, while the accommodation industry should be capable of serving both ends of the market. The terms ***"accessibility"*** and ***"gateway position"*** in Table 8.1 can, therefore, be assessed from two perspectives. First, being "*gateway*" destinations to their countries, major cities should aim to maintain their '*hub*' position to both domestic and international markets in order to retain their accessibility to visitor generating markets. Secondly, the accessibility of visitor attractions within destinations should be enhanced to increase visitor satisfaction. Although both Amsterdam and London were found to benefit from effective transportation facilities available for the discovery of tourist sites across the cities, one of the dilemmas faced by the visitors to Istanbul is found to be the trips to isolated heritage sites and buildings, which are not connected with the leading tourist zones through adequate transportation networks.

Once the product package is supported with further development projects and schemes in a gateway city, the attention is then forwarded toward the unique aspects of the destination. It is impossible for destination planners to alter certain inherited urban attributes, such as climate, geography, history and traditions. Nevertheless, in the era of post-industrialisation, which has led to the replacement of manufacturing outlets and factories by service industries in urban areas, an increasing number of cities aims to match visitor needs and expectations with their *'city'* offers through modifying, upgrading and improving urban infrastructure and tourism supra-structure. In the fiercely competitive market, the ***"uniqueness"*** of destination products plays an important role in determining their reputation as *'winners'* or *'losers'*. As the recent policies implemented in the case study cities support, cities increasingly focus on their unique heritage and culture products, which are also the foremost strong aspects of tourism, to establish their destination brands. Duplicate visitor attractions built as the core tourist products with the hope of generating demand, on the other hand, may result in image deterioration and lost market segments. Even contemporary visitor attractions attempt to enhance their appeal either by transforming unusual localities and sites into museums as in the case of the Tate Modern Gallery in London, or through outstanding architectural designs as in the cases of the Millennium Dome in London and the NEMO Science Museum in Amsterdam.

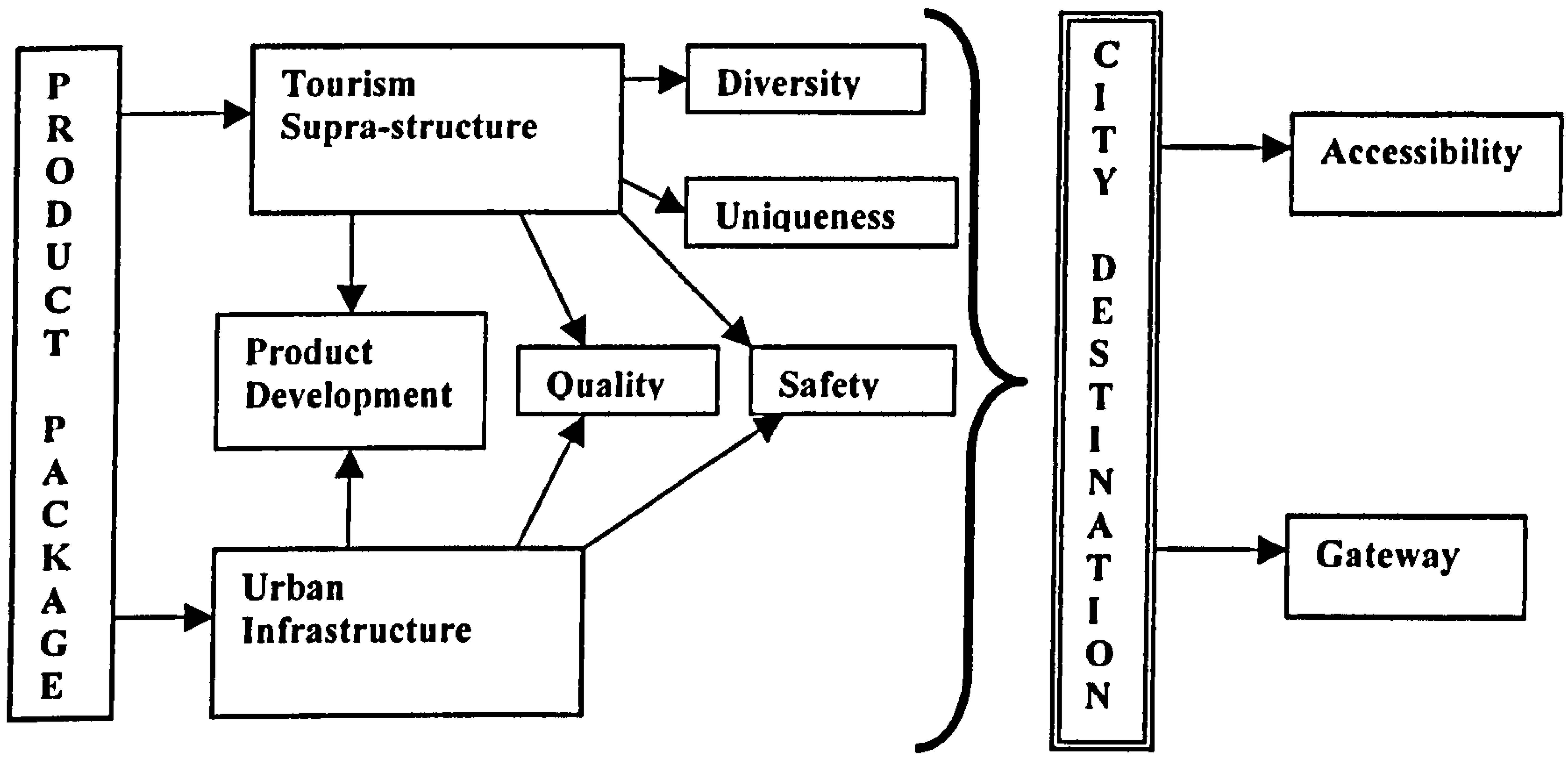
Although unique attributes of a product package earn a city destination an advantageous position in the competitive tourism market, they are not enough to ensure success in marketing efforts. In addition to their appropriate and effective packaging with other tourism services and facilities, the ***"quality"*** of the product package should also be at acceptable standards and should be perceived by existing visitors as satisfactory in meeting their expectations and needs. This is not to suggest that all accommodation outlets should be built as up-market establishments. In fact, the interview results suggest that the diversity of target markets requires all sorts of tourism establishments and service providers to operate in city destinations. But, if the example of the accommodation sector is taken further, it can be argued that city destinations should encourage the unification of hotel grading systems in order not to cause confusion, which may lead to dissatisfied customers and uncontrollable pricing strategies practised by different operations registered with various authorities. The service quality standards of hotel establishments should be regularly monitored in order to ensure that existing visitors are satisfied with the services' worth value for money. Clearly, the matters concerning the quality of service in city destinations are not exceptional to the accommodation sector, but encompass all tourism organisations, and even those public service providers. Public authorities and sub-industry groupings such as associations, unions and alliances, are the key organisations responsible for the maintenance of quality standards and for the regular inspections of their members' services.

Finally, cities are defined as economic and social agglomerations, in which the concentration of economic activities, power and labour forms dynamic and complex urban structures. This complex characteristic of urban networks often results in universal dilemmas including: crowding, pollution, traffic congestion, unemployment and high crime rates. In addition, urban areas may face the drawbacks of ill-planned tourism development especially with respect to the concentration of tourism in inner-city zones and an overflow of visitors in peak seasons. Although it can be argued that it is such chaotic atmosphere, which attracts visitors to city destinations, the urban environment needs to be perceived as safe by potential visitors. Numerous terrorist attacks targeting leading city destinations, including London and Istanbul, in the recent past, have also forced local authorities to take necessary precautions to reassure visitors of their ***"safety"*** during stay. Among the prevalent trends to maintain secure destination environments, thorough security checks at international stations and airports; surveillance cameras in major tourist zones and; the establishment of special tourism security forces can be listed. In an ideal city destination, visitor management schemes should also be practised both to overcome the fear of being in a strange and unknown locality among existing visitors, and to minimise the negative social and physical impacts of tourism on urban environments.

The negative aspects shown in Table 8.1 are some of these urban problems mentioned most by the interviewees, and it is here where the differences between Istanbul and the other case study cities are most remarkable. As the gateway destination of a developing country, Istanbul needs to deal with various urban dilemmas ranging from inward migration to high unemployment rates, while existing infrastructure facilities and services are yet to reach the standards of Amsterdam and London representing the developed world.

Having assessed all the codes related to a city destination product, the first phase of the knowledge- and case-based marketing model is formed as shown in Figure 8.2. The product package of urban areas is divided into two groups covering: those products and services managed by the tourism sector *–i.e. tourism suprastructure-*, and; urban infrastructure necessary for the effective functioning and development of tourism. Above-mentioned traffic congestion and crowding problems are considered to concern public service providers responsible for the maintenance and upgrading of infrastructure facilities, and should be dealt with in cooperation with the key stakeholders of a city destination, where tourism is either among the primary reasons of such urban problems, or the growth of the sector is severely damaged by them. As explained above, the quality and safety of the destination and its tourism offer also requires cooperation among all urban authorities and are related to both tourism suprastructure and urban infrastructure in the figure. While the importance of product development is explained above, it is also clear that any new tourism development scheme should fit into wider urban plans, where the support of urban authorities is especially crucial in enriching the accessibility of the newly developed sites. All these features combined with the tourism-specific uniqueness and diversity attributes compose the city destination product, which may benefit from its gateway position, and should, without doubt, be accessible to selected target markets. The accessibility should also be evaluated from the perspective of the diffusion of various tourist offers in cities, while the connections between them should be provided through effective and alternative transportation means.

Figure 8.2. Model Phase 1: City Destination as a Product



8.2.2. Management of a City Destination

Once the tourist offer of an urban area is defined, the attention then can be forwarded to the organisational structure of the tourism sector composed by the stakeholders, who are one way or another responsible for the production, delivery, maintenance or promotion of the package product. As mentioned in Chapter 3, sector stakeholders in city destinations are manifold, ranging from locals to hotel outlets, public urban authorities to attractions. While urban tourism planning and development is strongly tied to the regional and national tourism plans and projects of countries, the sequential effects of international tourism organisations on tourism development and marketing progresses from the national to regional, and to the local scale of cities. Within such a broad context, one can, therefore, consider regional, national and even international organisations as destination marketers and planners. However, due to the limitations and the main focus of this research, the attention is paid more to those '*direct*' marketers of city destinations, which are mostly located within the boundaries of urban areas or directly involved in the tourism planning and marketing processes.

Based on the primary findings from the three cities, the codes created with reference to destination management are shown in Table 8.2. The codes are grouped under the two headings: actors and management. In the first group, the reoccurrences of the codes used to analyse the interview findings regarding government involvement in tourism planning, government funding available for the marketing of the concerned destinations and the initiatives introduced by the governments for tourism development are all grouped under the term *"government"*, which leads the other actors with a total of 82 repetitions in the interview findings. Clearly, even in the cities like Amsterdam, where the majority of leading decision-makers and marketers are private organisations, the effects of government policies on local and regional tourism development cannot be ignored. As the case of Istanbul showed, the intervention of government is especially crucial during the early stages of tourism development, when government subsidies in the forms of grants and loans are often needed for the encouragement of the private sector to consider investing in tourism projects. Moreover, the changing priorities of consecutive governments were also found to influence the growth of the sector immensely, which requires uninterrupted commitment and support not only from government authorities, but also from other sector stakeholders.

Table 8.2. Reoccurrence of the Codes Related to *"Destination Management"*

Management Codes	*AMSTERDAM*	*LONDON*	*ISTANBUL*	*TOTAL*
Actors				
• *Government*	*23*	*30*	*29*	*82*
• *Leading Tourism Authority*	*15*	*16*	*15*	*46*
• *Community*	*25*	*6*	*15*	*46*
• *Private Organisations*	*14*	*8*	*10*	*32*
• *Public Organisations*	*11*	*10*	*7*	*28*
• *Semi-Public Organisations*	*n/a*	*9*	*5*	*14*
Management				
• *Partnerships*	*25*	*57*	*49*	*131*
• *Strategic Planning*	*22*	*28*	*20*	*70*
• *Education*	*6*	*17*	*31*	*54*
• *Decentralisation*	*5*	*14*	*n/a*	*19*

The role played by governments in tourism marketing and development is especially obvious, where the management and marketing of a destination product are orchestrated by public organisations on a local level. In fact, whether private or public, the establishment of a leading tourism authority (LTA) with arm-length responsibilities and a control mechanism over the fragmented tourism sector is found crucial in marketing and planning city destinations. Since it would be inappropriate to expect individual tourism establishments to execute citywide planning and management responsibilities, the LTA should have the responsibility: to bring all sector stakeholders under the same umbrella; to harmonise their individual marketing plans and strategies during the process of collective planning and marketing and; to establish '*consistent*' marketing plans concerning the destination as a total product package. Such a systematic and collaborating view can only be achieved by strengthening the internal communication network among stakeholders and the external one reaching potential visitors and intermediary organisations, which, as a result, requires the ***'leadership'*** of an orchestrating authority.

The fierce competition has recently forced the LTAs of the case study cities of this research to strengthen their leadership position through: changes to their organisational structures –*i.e. the transformation of the London Tourist Board as Visit London Ltd.*-; forming stronger relationships with the sector *–i.e. the Governments' aim to encourage sector stakeholders' involvement in the planning process in Istanbul and London-*; efforts to decentralise the marketing and development responsibilities of the LTAs *–i.e. Istanbul and London-*; and strategic planning activities in cooperation with all stakeholders *–i.e. Amsterdam, Istanbul and London–* . When the existing plans and missions of these leading authorities are analysed, a variety of other organisational aims and objectives can be noticed including: to lobby governments regarding tourism-related matters; to unite various tourism plans and projects to achieve common goals; to conduct marketing research; to run visitor management programmes to enhance visitor satisfaction; to strive for the improvement of tourism infra- and supra-structure; to support urban policies and strategies for the integration of tourism into the urban system and; to seek funds, grants and loans to run their operational functions. Obviously, depending on the characteristics of a given destination, the structure of the LTA and its objectives may vary.

In addition to LTAs, the organisational structure of any urban destination consists of private, public and semi-public organisations. As the findings from the case studies indicate, the roles played by such actors vary from one destination to another according to the allocation of the responsibilities of regulation, execution and management of marketing and development plans among manifold organisations. In Amsterdam, for example, where the marketing activities are mostly executed by private organisations, the responsibilities of public authorities are limited to: the implementation of tourism policies and; the preservation of cultural and heritage attractions. In fact, some local authorities, such as the City of Amsterdam, have been criticised for their neglect over tourism, which has consistently been last on their agenda after housing, security, infrastructure and social services. In Istanbul, on the other hand, tourism marketing and development have always been controlled by the Ministry of Culture and Tourism, which have, in the past, been criticised for not collaborating with private stakeholders in policy formulation and implementation.

The second group of the key terms in the model, therefore, draws attention to the establishment of ***'partnerships'*** to market tourist product packages of urban areas. Since, the product in concern, in urban tourism, is the combination of various primary, secondary and additional tourism and urban services and activities, the interdependence of each tourist product in the package and the co-operation among sector stakeholders are inevitable for successful planning and marketing. While each stakeholder should develop a vision to see beyond its own priorities and a strategic viewpoint of the tourism development in the destination, partnerships foster mutual understanding of the needs of each sub-industry; and help develop a sense of shared values. Besides, by pooling efforts, organisations can achieve economies of scale, since co-operative action taking and financing would reduce and spread the probable risks of tourism investment and development. More importantly, however, integrated and collaborative marketing can create a stronger impact on potential visitors, while the problem caused by confusing and divergent messages sent by various organisations especially in terms of image marketing, is overcome with united and coherent information dissemination. With the repetition of 131 times in the interview findings of all three cities, the importance of partnerships for city destinations was frequently emphasised by the interviewees, who considered city- and sector-wide cooperation as a foremost prerequisite of an accelerated tourism growth and success in marketing activities.

Before other management-related terms are assessed further, it is important to address the need for community involvement in tourism planning and marketing. As Table 8.3 shows, the importance of positive approach toward tourism development among the host community reoccurred during the primary data analysis as much as the necessity of establishing a leading organisation *–i.e. 46 times–*. Although there was a code created just to specify the comments of the interviewees on the community acceptance of tourism development, some of the unique aspects of the case studies, such as friendliness, tolerance and hospitality are also considered to elucidate whether tourism development is appreciated by the residents or not. That is why the cumulative total of these codes' reoccurrence is shown under the single term *"community"* in the above table. In fact, in cities, where various economic sectors coexist in a socio-geographical urban environment, the development of tourism is not an indispensable choice as in traditional holiday resorts. Unless local residents are educated and informed on the benefits of tourism, their resentment and lobbying activities to shift economic priorities toward other sectors may appear as a drawback of tourism on local agendas. Moreover, community involvement in the planning and marketing process is also necessary to overcome major urban dilemmas such as lack of efficient infrastructure facilities, traffic congestion and crowding in high seasons, with the support of all social and sectoral groupings existing in city destinations.

In addition to the key actors as decision-makers and planners, Table 8.3 also lists some of the management issues mentioned and stressed by the interviewees, namely: partnerships; strategic planning; education; and decentralisation. Although destination management is not clearly consisted of only these issues, but covers a wide spectrum of subjects, these four aspects of managing a city destination should be considered as the areas where action taking is needed most for successful marketing. Among these matters, the importance of partnerships is explained above. Most importantly, all of these management-related concepts should be harmonised within a ***'strategic plan'*** determining the short-, mid- and long-term goals and objectives of the destination. As mentioned above, a strong relationship between tourism management and urban functions is a precondition for the feasibility of an efficient and adequate destination marketing policy to increase the competitiveness of cities. Nevertheless, no matter how effectively tourism organisations try to market a city destination, it is destined to be a *'loser'* in tourism markets without consistent and coherent strategic tourism development plans. Marketing activities can only achieve desired and targeted aims and goals, if products and services offered meet the expectations of potential visitors from the destination.

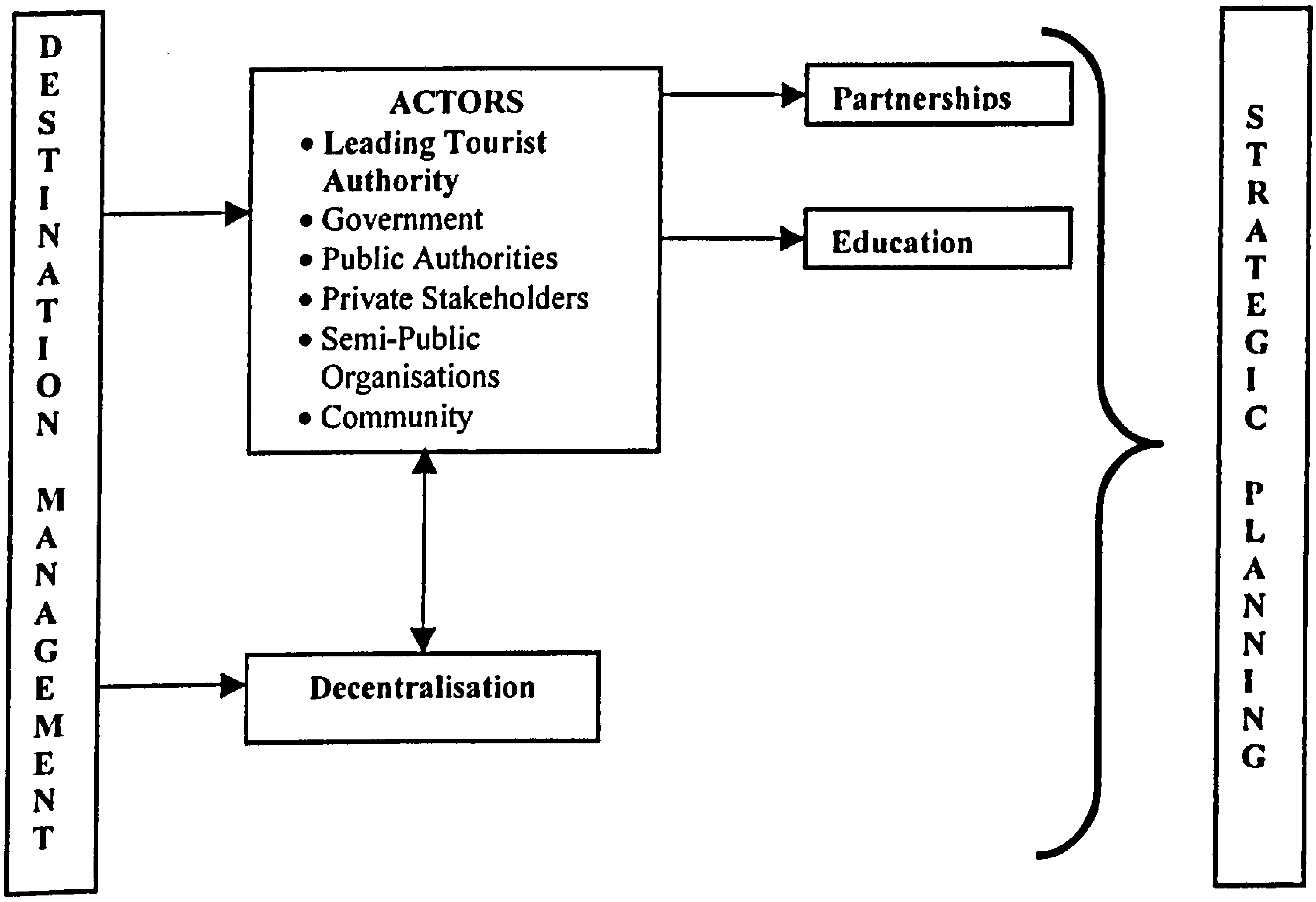
Comprehensive strategic development plans should relate to the overall urban system and aim to satisfy the needs of the local community as well as those of potential visitors. Successful tourism marketing by stakeholders is that which can help the realisation of such strategies. Therefore, city destinations should primarily identify their long-term goals, and then, activate short- and mid-term strategic plans adjusted in line with changing demand and supply characteristics to achieve success. The interview results from the three case study cities suggest that the need for strategic planning is highly acknowledged by sector stakeholders, who stated that in addition to the strategic plans of individual organisations, destination-wide missions, aims and objectives should be spread on a time-scale where short- and mid-term objectives are identified and achieved through action plans, and future targets are dealt in long-term vision plans. The leading authorities of all case studies prepare such strategic tourism development and marketing plans, even though it is a new phenomena in Istanbul, where the Minisitry of Culture and Tourism recently announced *"the 2010 Tourism Vision of Turkey"* which consist of 2-year action plans.

The term ***'decentralisation'*** in the table, meantime, is referred to the management of urban tourism by destination-based organisations rather than national and regional authorities. Although national tourism authorities are expected to develop long-term tourism development frameworks of countries and provide budgetary initiatives to induce tourism investment in selected tourist destinations, the tourism sector on a local scale is more likely to address the problems and opportunities of individual destinations effectively and promptly, particularly with regard to marketing activities. In order to strengthen the destination communication network between sector stakeholders, the destination-based LTA should be appointed with appropriate responsibilities and missions, which should primarily aim the creation of the right atmosphere for integrated policy making. The case of Istanbul shows that centralised tourism planning and marketing by national authorities is neither effective nor capable of eliminating bureaucratic obstacles hampering the growth of tourism. The fast changing trends in the international tourism sector and the need to establish shared values not only among sector stakeholders, but also with the support of all urban network players, require immediate action-taking and the understanding of tourism's functioning in urban areas, which is best dealt by the sector itself at a local scale.

Finally, as mentioned above, local community approach toward tourism development should also be considered at the management phase of destination marketing. Tourism imposes social and cultural impacts as well as economic ones on host communities, which may be perceived as to damaging the quality of urban life by local residents during high seasons and in congested tourist zones. Therefore, the concerned authorities should run *'education'* programmes to inform local community on the benefits of tourism development and to avoid local opposition and conflicts regarding tourism development, while precautions should be taken to minimise the negative impacts of the sector. Tourism education is not only limited to raising awareness on tourism and the catalyst role of the sector in urban regeneration among local people, but also consists of educating stakeholders, visitors and other economic and social communities of an urban network. Visitors need to be informed on the unique traditions and culture and should be guided through the application of visitor management schemes in order not to surpass capacity thresholds of the destination visited. Informative and educational seminars, workshops and training courses designed for tourism staff, stakeholders and the key players of the urban network, meantime, are particularly crucial for sustainable tourism development; integrative destination marketing and; the maintenance of service quality standards. That is why the term *"education"* combines the codes *"educating stakeholders"*, *"educating staff"*, *"educating visitors"* and *"educating residents"* in Table 8.3, where the repetition figure is a total of the reoccurrences of all these codes.

All of the above mentioned management-related issues are shown in Figure 8.3, which forms the second phase of the model. While destination management is executed and implemented by all actors shown in the figure, the interview findings suggest that successful tourism marketing and planning is best accomplished through the orchestrating efforts of a leader organisation, who is equipped with adequate responsibilities and funding sources through decentralisation. While all the actors need to cooperate to market their collective city destination product through establishing either project-based or systematic partnerships, they also need to be provided with feedbacks and benefits of tourism development through regular meetings and education programmes in order not to cause disharmony of marketing activities. Moreover, all of these efforts should be integrated into strategic tourism development and marketing plans. While, a leading tourism authority should identify the long-term vision of the tourism sector, the effectiveness of its marketing activities would depend on its ability to produce short- and mid-term development plans and strategies to adjust the destination product to emerging external opportunities and threats.

Figure 8.3. Model Phase 2: Managing a City Destination



In addition to the above-mentioned "key terms" in managing a city destination, the need for contingency plans has been further reinforced following the recent crises triggered by the 9/11 attacks, which have caused sudden decrease in visitor arrivals across the world. Since crises may arise in a short period of time without warning, but with damaging effects on the tourism sector, the tourism management network of any destination should address such threats to the effective functioning and maintenance of the sector sufficiently, promptly and in a collaborative manner. Since the market advantages of the crisis-struck destination may be severely damaged and may require a long period of time for full recovery from negative image perceptions among potential visitors, ***'crisis management'*** should be put into practice by the concerned authorities in order to identify sequential steps of contingency plans; to prepare the sector to deal with negative events and chaos prior to crises and; to take immediate action to work toward protecting or rebuilding the image of the destination as a safe and attractive place following the crisis. Since the primary data collection in this research had been completed prior to the attacks, the need for crisis management has not been emphasised by the interviewees as much as they would have done if they were contacted after the 9/11 events. The noticeable damage experienced by the tourism sectors of London, Istanbul and many other European destinations following the attacks justifies why destinations now pay greater importance to establishing crisis management teams and preparing contingency plans (Hopper, 2002).

8.2.3. Marketing a City Destination

Once the strengths and weaknesses of the destination product on offer are analysed and the effective tourism management network is established, the delivery of marketing strategies should be pursued by city destinations. The last group of the interrelated codes shown in Table 8.3 are, therefore, marketing-related and include: the marketing tools used by the marketers of the selected cities; their comments on market segmentation; the competitiveness of the case study cities; the need for strategic marketing; marketing research; image marketing and; collective marketing. The codes are again listed according to their number of reoccurrences within the interview findings.

As mentioned in Chapter 7, there are numerous marketing tools used by the case study cities. The ones mentioned most by the interviewees include printed promotional material such as brochures, leaflets and maps; travel markets; advertisement campaigns; press releases; public relations and IT marketing. As the interview findings suggest, while marketing activities embracing printed material, press releases, direct marketing, sales promotion, public relations and Internet sites are used by numerous tourism organisations, city-wide promotion covering the tools such as advertisement campaigns, attendance to travel fairs and the organisation of familiarisation tours are more expensive and expected to be orchestrated by the leading tourist authorities, who should co-operate with sector stakeholders for the appropriate representation of the cities. While there are websites created for all three cities either by their leading tourism authorities or by other organisations, the cases of Amsterdam and London show that there is no limit in finding new and innovative marketing tools to enrich visitor experience and to promote the city as a whole package represented by logos, product brands and slogans. In fact, IT-based tools, such as Internet sites and computerised information services, have become essential components of the marketing mix due particularly to their advantage in collecting feedback from potential visitors as well as transmitting information.

There is no doubt that the combination of the marketing tools used by a city destination should rely on its marketing priorities, which should ideally aim to send a clear and consistent message on the strengths of the product package to selected target markets. Communication, however, is not limited to the promotional efforts directed at potential and existing visitors. City destinations should also establish appropriate and effective communication networks with residents, sector stakeholders, intermediary organisations and public authorities in order to strengthen their competitiveness and to ensure the effective functioning of the tourism sector through the dissemination of authentic, beneficiary and complementary messages.

Market segmentation, too, depends on the visitor profile of the destination concerned, and its aims to fulfil the needs of potential market segments with existing or newly developed tourist services and activities. The case of Amsterdam verifies that an unwanted market segment attracted may lead into an image associated with the existing visitors' profile, and which may take long-period of time to transform into an image desired. While the Amsterdam Tourism Board (VVV) concentrates on '*theme*' years in the process of replacing the deteriorated image with a positive one highlighting the cultural and heritage offers of the city, the case of London showed that domestic market is as important as the international one especially during crises periods. The advantage of city destinations, however, is that they can appeal to broader market segments than traditional holiday resorts, since their package often contains something for everyone. Still, when the purpose of visit is taken into account, the interview findings suggest that business visitors are among the most desired segments mainly because of their higher propensity to spend than other visitor types. Mainly for the same reason, international visitors are often preferred to domestic visitors, while marketing activities often concentrate on the European and North American countries, which are considered as the leading visitor generators for all three cities. Although there were other market segments mentioned by the interviewees, such as the Middle Eastern and South Africa markets, the regions listed in Table 8.3 are the ones found in the findings from all three cities.

The findings on the competitiveness of Amsterdam, London and Istanbul indicate that the cities try harder than ever to place their locality in the international tourism map and to gain economic, social and physical benefits of tourism development, hence confront fierce competition not only from other major urban areas, but from all types of tourist destinations. In fact, the competition faced by tourist cities is tougher than holiday resorts or rural areas, as they strive for the attraction of diverse market segments with their product package combining extensive offers ranging from cultural events to heritage sites, and from sports activities to MICE tourism. Besides, since they are the gateways to their countries with rich offers not easily challenged by other domestic destinations, their competition transcends national borders and gains an intercontinental characteristic. Therefore, one can argue that a city destination needs to manage, control and form its multi-sided ***'competitiveness'***, which is influenced by: the accessibility of the destination to its major generating markets; the overall economic well-being of its urban network; the quality of living, hence the attractiveness of the city as a place to live, work and visit; the availability of the labour force; its strategic position in the global trade circles; the commitment of governments on sustainable tourism development and regeneration schemes and; the variety of tourism and recreation activities. The close scrutiny of competitors' offers; systematic and coherent action-taking and decision-making with regard to product development and improvement and; an effective tourism management network are also found imperative to strengthen the competitiveness of urban areas as tourist destinations.

Table 8.3. Reoccurrence of the Codes Related to *"Destination Marketing"*

Marketing Codes	*AMSTERDAM*	*LONDON*	*ISTANBUL*	*TOTAL*
Marketing Tools				
• *Printed Publications*	14	15	10	39
• *IT Marketing*	9	15	3	27
• *Travel Markets*	9	9	8	26
• *Public Relations*	8	9	9	26
• *Advertisement*	9	10	6	25
• *Press Releases*	6	7	5	18
• *Direct Marketing*	4	5	2	11
• *Familiarisation Tours*	3	3	4	10
• *Famous Persona*	4	4	1	9
• *Word-of-Mouth*	2	5	1	8
• *Sales Promotion*	1	3	n/a	4
Market Segmentation				
• *International Marketing*	17	16	18	51
• *Domestic Marketing*	13	15	8	36
• *Business visitors*	10	9	10	29
• *Organised Groups*	9	13	n/a	22
• *Day Visitors*	1	5	8	14
• *Families*	9	3	n/a	12
• *Individual Travellers*	3	7	2	12
• *Young Travellers*	9	n/a	n/a	9
• *Repeat Visitors*	2	6	n/a	8
• *First-time Visitors*	3	n/a	n/a	3
• *Europe*	19	15	16	50
• *North America*	15	14	6	35
• *Far East*	8	9	3	20
Competitiveness				
• *International Competitors*	18	12	12	42
• *National Competitors*	9	10	6	25
Strategic Marketing	27	32	23	82
Cooperative Marketing	23	29	17	69
Image Marketing	24	13	14	51
Marketing Research	15	15	8	38

The other four terms in Table 8.3 refers mainly to how marketing activities should be structured and which aspects of city marketing are considered most important by the interviewees. First one of these terms is strategic marketing. As in the phase of tourism management, the marketing phase of the model should also be tied into ***'strategic marketing'***. All the components of city marketing should be examined and embraced by strategic marketing plans, which put the emphasis on the interrelatedness of product, management and promotion. The main notion of strategic marketing is to adjust a marketable product to unexpected changes in the market and the overall business environment with the application of short- and mid-term marketing plans, while long-term marketing strategies and plans outline the main aims and goals to be achieved by city marketers and urban development agencies. While an action-oriented approach of strategic marketing enhances the competitiveness of destinations in changing tourist markets, consistency is crucial. As the case of Istanbul proves, one of the common mistakes made by destination authorities is to produce ad hoc solutions to sector issues and to neglect the establishment of coherent and achievable long-term goals. This is mainly due to the national tourism policies changing according to the conflicting priorities of consecutive governments and their influence on regional and local tourism plans. However, without effective and appropriate long-term visions, marketing plans consisting of short-term tactics and strategies would not result in tourism to induce its economic, social and environmental benefits at optimal levels. As the number of repetition in Table 8.3 confirms, the importance of strategic marketing is highly acknowledged by the interviewees, while the leading tourism authorities of all three cities were mentioned to be involved in the strategic marketing process.

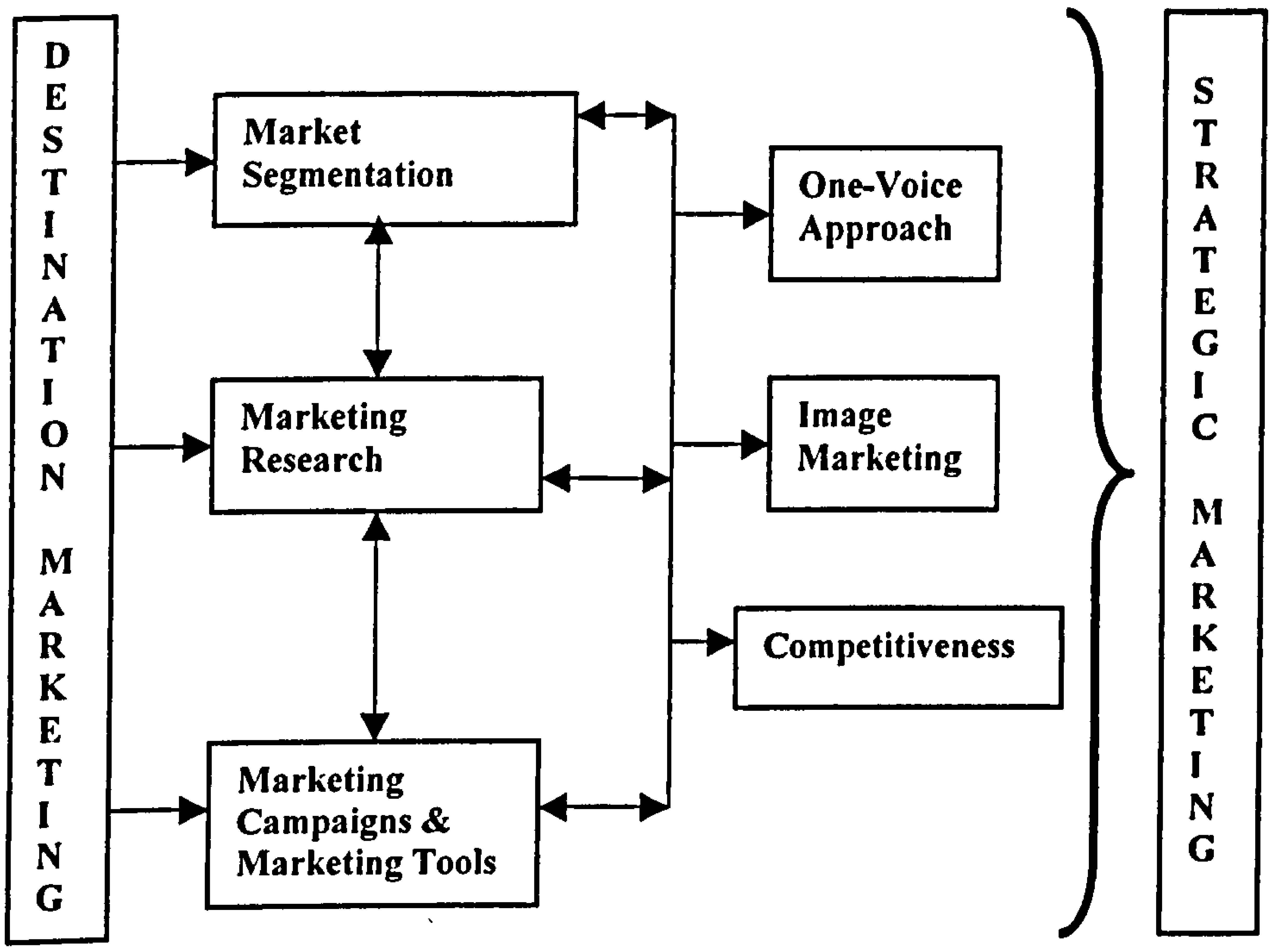
Secondly, the success of marketing a city product package highly depends on the creation of a ***'one-voice approach'***. It is argued in this research that cities can only be marketed effectively as tourist destinations, if all the concerned authorities and organisations get together under the same umbrella for collective marketing. Only then the messages of various campaigns would not cause confusion and chaos, but facilitate the consistent and desirable image creation to revolve around certain icons, landmarks and product packages, which address the needs of target segments as well as those of the sector. While such an approach requires a consensus between all the concerned stakeholders on the promotion principles and messages determined in the strategic plans of the destination's LTA, it helps to distinguish the position of the destination package in comparison to competitors and to raise awareness on its purpose-designed brand among potential visitors. In fact, the need for establishing partnerships often associated with the importance of collective marketing by the interviewees of this research, while the leading tourism authorities were found to encourage private and public sector involvement in marketing planning and implementation as well as the support of local residents.

Thirdly, ***'image'*** is surely the most influential factor, which reflects and shapes the perceived competitiveness of cities by target markets. Thus, a thoroughly evaluated and improved image should be placed at the centre of marketing efforts, which attempt to send a clear and united message to the potential buyers of the city product. An ideal image of a city embraces the strong aspects of the tourism sector and its urban network. In reality, however, urban areas are often associated with crime, traffic congestion, high costs of living, unemployment and crowding. Moreover, as the case of Amsterdam indicates, the transformation of a well-established negative image into a positive one takes long period of time, while the tourism sector continues to suffer from diminished visitor movement and activities in the destination along the transformation process. Therefore, city destinations should firstly identify their image constituents emphasising the strengths of the tourist offer; take necessary precautions to modify their image in close co-operation with sector stakeholders; involve in image marketing activities to improve their position in the domestic and international tourism markets; and finally, retain their image strategies in consecutive plans and marketing activities to achieve a long-lasting impact.

Finally, another important component of the city marketing process emerged as ***'research'*** in the primary data analysis. Only by conducting marketing research can city marketers decide which market segments are to be attracted and which are to be discouraged from visiting their city. Surely not all visitors are desired. In other words, effective marketing should identify the market segments to be attracted to a particular city destination. Valuable information on: travelling motives of visitors; major generating markets; perceptions of visitors about the city and its attractions; their demographic characteristics and; attitudes and behaviour of visitors during their stay in the city can only be obtained through extensive studies and investigation. According to the results of such research activities, marketing efforts can be directed toward the segments in which potential visitors would fit into the market portfolio of the destination on offer. The reliability and validity of the information gathered is particularly important, as the results should guide urban planners and city marketers in adequate, effective and prompt decision-making. Research activities are also important to inspect operational services and functions of suppliers and the overall well-being of the sector in comparison to the competitors'. Moreover, city marketers should regularly monitor each phase of their own marketing process and to adjust their strategies and policies according to their experiences and lessons learnt.

In order to form the last phase of the marketing model for city destination, the above mentioned issues and terms are gathered in Figure 8.4, which shows that destination marketing is composed of: market research; the selection of appropriate marketing tools and their harmonisation in marketing campaigns and; the analysis of potential and existing market segments. Such implementation phase of city marketing is ideally executed in collaboration of all stakeholders to create a one-voice approach, where image marketing is pursued to increase the competitiveness of the destination concerned. More importantly, however, all the phases of the marketing model, including the product and management phases discussed in the previous sections should be integrated into the process of strategic marketing prepared in line with strategic tourism development plans. While strategic marketing plans should be revised regularly to monitor changing market trends, product characteristics and the effects of external environment factors, destination marketers and planners should consider the interrelated phases of the model developed when identifying their mission, objectives and aims.

Figure 8.4. Model Phase 3: Marketing a City Destination



8.3. Marketing Strategies for Istanbul

The above-discussed model is further exemplified with some action points proposed for the optimal marketing of Istanbul as a tourist destination in this section. The combination of the action points should help form the basic foundations of a strategic marketing plan for the city and follows the sequential steps of the model in order of product-, management- and marketing-based strategies. While the action points are supported with the lessons learnt from Amsterdam and London, they consist of aim captions, timescale–*i.e. short-, mid- or long-term-* and the key organisations considered responsible for the strategy implementation. While the following strategies are only suggestions confined by the limitations of this research, a thorough and more detailed analysis of the tourism sector and the urban network of Istanbul may cause alterations to these proposals in line with the changing characteristics of both demand and supply. The overall aims of the action points are supposed as: to integrate tourism into the urban network of Istanbul; to use tourism as a catalyst in urban regeneration schemes; and to increase the city's share in both domestic and international visitor markets through strengthening its competitiveness.

In order to identify the areas where the need for action-taking is suggested by the Istanbul interviewees, the reoccurrence of the codes concerned are shown in Table 8.4. These codes were discussed and compared with the findings from the other two case study cities in Chapters 6 and 7. As the table shows, the highest number of repetition was on the lack of consistent and coherent marketing plans with 18 quotations. In fact, until very recently, there has not been a tourism development and marketing plan developed for Istanbul on a local scale. The recent strategic plan prepared by the current government, meantime, stresses the importance of the city as a pilot destination of decentralised tourism planning and marketing, but still lacks thorough analysis of the product package and concentrates more on product development as opposed to integrating product-based strategies into a strategic plan where management- and marketing-based strategies are also defined. In fact, while the government seems to consider the selection of Istanbul as the initial step of the decentralisation era, the *"the 2010 Tourism Vision of Turkey"* does not bring any solutions to the lack of a leading tourism authority responsible for orchestrating cooperative marketing activities, which is, as proved by the findings of this research, an important prerequisite of destination marketing on a local scale. As the code *"lack of confidence in LTA"* indicates, the Istanbul Tourism Directorate is far from fulfilling such a leader position given its current organisational structure and limited responsibilities.

Table 8.4. Reoccurrence of the Codes on the Need for Action-Taking for Tourism Development and Marketing in Istanbul

Codes	*Reoccurrence*
Lack of marketing plans	18
Lack of confidence in LTA	17
Lack of sufficient urban infrastructure	16
Traffic congestion	16
Need for funding	13
Lack of co-operation	11
Educating staff	10
Educating stakeholders	9
Need for more staff	9
Bottlenecks of partnerships	9
Unsafe destination	9
Educating locals	8
Need for partnerships	8
Overcharge of tourist products	7
Quality of tourist products*	7
Seasonality	5
Negative Image	5
Ignored domestic tourism	5
Ignorance of the total marketing offer	3
Crowding	3
Lack of accommodation	2

* Only the interviewee comments regarding the unacceptable standards of product quality are shown in the table. The code was attached to 10 quotations including three positive remarks regarding product quality.

What is important to note, however, is that Istanbul has a great potential to evolve as a competitive destination considering the strengths of its primary tourist products. As the above table displays, most of the negative aspects mentioned refer either to the ineffective tourism management and marketing of the city or wider urban problems such as inefficient urban infrastructure and traffic congestion. In light of this information, a comprehensive and utilizable strategic tourism plan should take into account manifold aspects of the urban environment. Constructed with inputs from the representatives of the private sector as well as local authorities, the following action points are considered especially valuable for the implementation of cooperative planning and marketing, but were confined by the concerns and perceptions of sector stakeholders due to the limitations of the research. A more thorough analysis may require the examination of community approach toward tourism development and marketing.

8.3.1. Product-Based Strategies

According to the marketing model developed in this thesis, a city destination as a product package should embrace certain resources to compete successfully in the international market. These are grouped under the two main headings, namely tourism suprastructure and urban infrastructure. The uniqueness and diversity of tourism services and facilities help determine the attractiveness of the city, while the quality and safety of the whole product package is crucial for the effective functioning of the tourism sector. If Istanbul is assessed according to these criteria in light of the interview findings, it can be argued that the city has adequate resources in terms of unique landmark attractions and other tourism organisations fulfilling the needs and wants of existing visitors. Product development, which is especially important for those destinations at the early stages of tourism development and the ones experiencing the decline phase in their tourism life-cycle, does not seem to be imperative for Istanbul at this stage, which benefits from the well-known heritage sites and buildings inherited by the early civilisations. In other words, the city does not experience the difficulties faced by many European cities in the 1990s. This era is typified by the move of the manufacturing industries to cheaper rural locations and forced local authorities to initiate tourism development via regeneration schemes, where the construction of new attractions and the encouragement of private investment in the accommodation and service sectors through grants and loans were necessary.

In Istanbul, meantime, the problems hampering the growth of tourism mainly relate to the belated action taking in improving the urban infrastructure, which lags behind the standards of those competitors of the developed countries. As mentioned in Chapters 2 and 6, in the city where inward migration and squatter settlements are yet to slow down, the provision of infrastructure services at an adequate level seems to be difficult to achieve in the short-term. In addition to the large sums of public money required in order to upgrade urban and tourism infrastructure, the uncoordinated approach of various public authorities toward problem solving consolidates problems. Although such problems are hardly caused by tourism, effective running of the sector is clearly threatened by them. As well as ongoing transportation difficulties for visitors, the assumption that Istanbul is a chaotic metropolis, may be further enhanced by such difficulties and may become another contributory factor to its negative image. On the other hand, it can also be argued that such a chaotic atmosphere is so typical that the hectic and mystic everyday life of Istanbul can be an attraction on its own for visitors.

There is no doubt that such urban problems cannot be dealt by the stakeholders of the tourism sector only, but requires urban-wide cooperation supported by national economic development plans. Hence, it can be argued that long-term and substantial solutions would only be achieved, if local, regional and national development plans are interdependently developed and aim to give an impetus to the regeneration of all-level economic, socio-cultural and physical structures. While the use of tourism as a catalyst could be considered within regeneration schemes, such projects require the determination of the Municipality and other public authorities in developing tourism in co-operation with the private sector and with sufficient financial sources in the forms of public grants and loans *–i.e. Docklands and IJ Waterfront Regeneration Projects in London and Amsterdam-*. The tourism sector should be interactively involved in the efforts of upgrading infrastructure facilities particularly important for the effective functioning of the city. The interview results suggest that public transportation and traffic congestion are among such services.

Having considered such specific problems of Istanbul and the key issues mentioned in the product-phase of the marketing model, it is the argument of this thesis that the primary product-related aims of a possible strategic marketing plan can be listed as follows with sub-actions identified for each aim:

A) TO SUPPORT TOURISM DEVELOPMENT WITH NECESSARY IMPROVEMENT ON URBAN INFRASTRUCTURE

Action Point A1	Develop rapid and efficient physical movement for visitors through packaging tourist products with user-friendly transportation links and "passenger-pass" schemes. *(Short- and Long-term)*	LTA IBB
Action Point A2	Publish informative brochures and maps on how to use public transportation in several foreign languages. *(Short -term)*	LTA IBB
Action Point A3	Increase the number of car parks near leading tourist zones and visitor attractions especially for those domestic visitors travelling by their personal cars. *(Mid- and Long-Term)*	LTA IBB IGO
Action Point A4	Provide clear signage of leading tourist zones and visitor attractions *(Short- term)*	LTA IBB IGO

Traffic congestion is one of the major urban problems of Istanbul. While traffic networks of almost all major urban areas do not flow during the peak hours, transportation in Istanbul is especially difficult as the city was built with narrow and irregular streets. The problem is also related to the belated action taking of the concerned authorities in allocating appropriate urban space for car parking. Moreover, the public transportation services provided by the Municipality are rather confusing and are not user-friendly for visitors. Although there are numerous bus and boat shuttle services between various districts of the city on both shores, they are mainly used by the residents. International visitors are not provided with appropriate information on these services upon their arrival to the city. While visitors on packaged tours are taken around the city by coaches operated by tour operators, transportation within the city remains to be a problem especially for individual travellers.

Although the IBB has been investing in the development of the underground and light-railway network, the initial efforts are directed to mitigate the transportation problem between the business centres and residential areas for local people. There is an urgent need to develop rapid and efficient physical movement of visitors with efficient rail, bus and boat services and easily understood signs. It is also necessary to increase the number of multi-storey or underground car parks near major tourist and entertainment zones. The concerned organisations should consider introducing a network approach under a purpose-designed scheme such as the *'I amsterdam'* card or the *'London Pass'*, which contain entrance tickets to leading visitor attractions and unlimited travel in all public transportation means for international visitors.

B) TO STRESS THE DIVERSITY AND UNIQUENESS OF THE TOURIST OFFER

Action Point B1	Analyse the strengths and weaknesses of Istanbul as a tourist destination for the creation of a unique destination package *(Short-term: realities; Long-term: opportunities and threats)*	LTA Stakeholders
Action Point B2	Initiate a special program for the refurbishment and preservation of heritage sites and historic buildings for the use of tourism. *(Short- and Long-term)*	TCKTB LTA IBB IGO
Action Point B3	Emphasise the cultural, arts and entertainment opportunities available in the city for visitors. *(Short- and Mid-term)*	TCKTB LTA IKSV
Action Point B4	Develop special effort to attracting MICE market. *(Short- and Long-term)*	LTA ICVB
Action Point B5	Emphasise the importance of shopping tourism and draw attention to the rich variety of shopping opportunities available in the city for visitors. *(Short- and Mid-term)*	LTA Stakeholders
Action Point B6	Organise special events and festivals to raise awareness on Istanbul as a tourist destination. *(Short- and Mid-term)*	LTA, IOBC IKSV, IBB Stakeholders
Action Point B7	To develop tourism as a year-round sector through the application of strategies to promote greater visitor travel in low seasons. *(Short- and Mid-term)*	LTA Stakeholders

As mentioned above, despite its weaknesses, the primary data findings suggest that Istanbul has all the proper and attractive assets of a unique tourist offer. Therefore, the key city marketers of the destination should prepare a tourism inventory to consider such strong components of the sector within a product package concept and aim to match them with the characteristics of the selected target markets. In order to support the findings of the SWOT analysis, the views and concerns of the stakeholders and existing visitors should be investigated on an on-going basis. In addition to unique attractions, the findings of this research indicates that Istanbul can differentiate itself from its competitors through emphasising: its location between Europe and Asia; the friendliness of Turkish people toward foreigners; the Turkish cuisine; the characteristics of Istanbul as a gateway to Turkey and cheap destination and; its relatively warmer climate compared to North and East European city destinations.

The case of London indicates that the success of a city destination also hinges upon the diverse product range offered by the tourism sector as well as the familiarity of potential visitors with well-known landmark attractions. Therefore, the uniqueness and diversity of the product package should be assessed jointly, where the core tourist products of the city should be linked with other secondary and supplementary components of the offer in order to increase the tourist opportunity spectrum and to encourage visitors to combine as many products as possible, hence to stay longer and to spend more. While this would enhance the multi bought/multi-sold characteristic of the destination, the uniqueness of the offer components appealing to different target markets would help identify the competitive advantages of the city in different segments. In order to further assess the diversity of the package offer and the potential of offer components in reinforcing the presentation of Istanbul as a unique destination, the related codes are listed according to their reoccurrence in the interview findings in Table 8.5.

Table 8.5. Reoccurrence of the Codes Regarding the Relationship Between the Purpose of Travel and the Attractiveness of Istanbul As a City Destination

Codes	*Reoccurrence*
Heritage	27
Arts, culture and entertainment	12
Attracting business visitors	10
Shopping	8
Special events	6

As the table verifies, heritage is the foremost component of Istanbul's tourism offer with a considerable pull-in effect on potential visitors. The problem, however, rests in the use of many heritage sites and buildings for tourism and their packaging with other tourism products and services. The current tourism policy of the Ministry of Culture and Tourism (TCKTB) introduces the Historic Peninsula Project, which aims to transform the area into a museum quarter. There is no doubt that the sector would benefit from the project providing a determined and systematic implementation process is started immediately and carried out in co-operation with sector stakeholders. However, there are numerous historic buildings and sites outside the Peninsula, which are neglected. Feasibility studies should be conducted to assess the potential of these sites as tourist attractions. In any case, restoration works should be initiated for their preservation and future use for tourism.

Moreover, the findings of this research suggests that some of the publicly-run museums, such as the Topkapi and Dolmabahce Palaces, suffer from the problems of inappropriate funding and the employment of unskilled staff. Necessary precautions should be taken to improve the operational structures of such historic places as tourist attractions with appropriate sources of funding and the employment of qualified and bilingual personnel. There is also a need to connect various historic sites spread around the city through visitor management schemes and purpose-designed marketing activities to strengthen the heritage tourism offer. As in Amsterdam and London, the use of heritage sites for conferences and exhibitions should be further promoted.

The code "*heritage*" is followed by the code "*arts, culture and entertainment*" with 12 quotations. There is no doubt that culture is another component of city destination offers, which helps remarkably to distinguish a given city from its competitors and to strengthen its uniqueness in the tourism market. The notion of '*fun city*' also seems to play an important role during the decision-making process of potential visitors. For both Amsterdam and London, the diversity of cultural events, arts-related activities and major entertainment zones were shown as the strengths of the tourism sector by the interviewees. Although Istanbul has also embrace a variety of cultural and arts activities, its culture offer needs to be enhanced and further highlighted in promotional efforts.

The MICE market, meantime, accounts for a notable share of the overall visitor numbers in all case study cities. Due partly to the fact that this particular tourism form generates higher revenues with business travellers spending more on average than any other market segment, the case study cities attempt to target international conferences and exhibitions via the establishment of convention bureaux. In London, the Greater London Authority (GLA), the London Development Agency (LDA) and Visit London (VLL) have jointly addressed the importance of business tourism in a separate plan titled '*London Leadership Forum on Business Tourism*'. Although the Istanbul Convention and Visitors Bureau (ICVB) was founded in 1997, its aim to establish an integrated approach in marketing Istanbul as a conference and convention destination still requires further support of both public and private members of the tourism sector. The Conference Valley and the business park near the Ataturk Airport have great potential for the attraction of the MICE market to Istanbul, although the competitiveness of the city in business tourism relies on the expansion of its conference and exhibition facilities. As in London and Amsterdam, establishing an inward investment agency may also be worthwhile, as the attractiveness of the city as a global trade centre for new investment and international organisations and as a business tourism destination are greatly interrelated.

The code "*shopping*" was attached to 8 quotations, most of which denote the emerging importance of shopping tourism for city destinations and the plentiful existing resources available to strengthen the competitiveness of Istanbul. In fact, the city embraces both the historic Grand Bazaar and contemporary award-wining shopping malls in its tourist offer. As a cheap destination famous especially for textile goods, leather, jewellery and carpets, the city holds a great potential as a shopping destination. The concerned authorities should acknowledge the opportunities in promoting Istanbul to special interest markets, including those whose main purpose of travel is shopping and, should encourage the creation of a shopping-oriented tourist package.

The organisation of special events and '*theme years*' with the aim of raising awareness among potential visitors and transforming a negative image into a '*culture-centred*' positive one, is currently attempted by the Amsterdam Tourist Board (VVV). The impact of special events is also evident in terms of the diversification of the tourist offer and the attraction of visitors during off-seasons and crises period in London. Istanbul has so far applied to host the 2000, 2004, 2008 and 2012 Olympic Games, but has lost the candidacy battle to other cities. The Istanbul Olympic Bidding Committee (IOBC) has been appointed by law to bring the Games to the city no matter how long the bidding process lasts. Most of the projects to build new sports complexes and an Olympic village have been completed, while the major obstacles for the selection of Istanbul as the host city mostly relate to urban-wide problems such as inadequate urban infrastructure and a lack of qualified labour force required for hosting such a mega event. Although the determination to bring the Games to Istanbul by the consecutive governments helps stimulate civic boost among local residents, the key stakeholders and public authorities should pay greater attention to hosting other international events and festivals, and to support the existing ones with sufficient public grants and initiatives.

In fact, the recently held international events, such as the UEFA Champions League Final in 2005, the Eurovision Song Contest in 2004 and the inclusion of the city's newly built race-track "*Istanbul Park*" for Formula 1 in 2005 can be considered as notable achievements in strengthening the city's position in the international tourist map, especially if the interest of international media can be generated. That is why the continuity of special events and their effective management and marketing should be aimed by the leading tourism authority.

Finally, the diversity of the package offer should be presented in a way to assure visitor arrivals in different periods of a year. The discussions on the seasonal variations in demand in the case study cities confirmed by the interview findings, supports the argument that London, Istanbul and Amsterdam embrace a wide range of market segments in their visitor profiles and seem to be *'all-year-round'* destinations. In fact, city destinations are more likely to distribute their manifold market segments evenly across the year than those holiday resorts. Yet, the key authorities of Istanbul should pay greater attention to policies aiming to offset possible seasonal fluctuations of demand through directing marketing efforts toward different market segments in different seasons. The introduction of special events and the attraction of short-break market, domestic visitors and business travellers in low seasons should be considered and supported with appropriate promotional publications such as the *'Amsterdam Winter Adventure'* published by the VVV.

C) TO IMPROVE THE QUALITY STANDARDS OF BOTH TOURISM SERVICE PROVIDERS AND URBAN INFRASTRUCTURE FACILITIES AND TO ASSURE THE SAFETY OF VISITORS

Action Point C1	Set quality standards for service suppliers to ensure visitor satisfaction. *(Short- Mid- and Long-term)*	TCKTB LTA Stakeholders
Action Point C2	Cooperate with urban infrastructure providers in raising the quality standards of those services used by visitors and tourism suppliers. *(Short- Mid- and Long-term)*	LTA Stakeholders

As discussed in the previous section, one of the fundamental prerequisites of a successful tourism development and marketing in a city destination is the quality of its product package. In Istanbul, the accommodation establishments are licensed either by the Ministry of Tourism and Culture (TCKTB) or the Greater Municipality of Istanbul (IBB). The primary data findings of this research suggest that although the Ministry-licensed hotels are equipped with appropriate services and facilities according to their grading, the IBB-licensed establishments were criticised for their poor quality by the interviewees. In addition, overcharging of tourist products and services was found to be a well-established habit among small-sized souvenir shops and taxi drivers, who demand much more than the usual price of their services from international visitors. The key authorities should strive for the support of sector stakeholders to abolish such practices, which damage Istanbul's reputation for fairness. While necessary precautions should be taken to ensure the highest quality of customer care, the standardisation of charging methods should be introduced. More attention must be paid by operators to standards of service, hygiene and general cleanliness of premises at all price levels. Similarly, local authorities should exercise their statutory responsibilities and regular inspections to ensure the application of hygiene, safety and quality regulations by service providers. Cooperating with local authorities with regards to raising the quality standards of urban infrastructure facilities is also imperative given the fact that the package offer combines both tourism suprastructure and urban infrastructure. Lobbying local authorities on the needs of the sector should be carried out by the leading tourist authority as well as the key stakeholders.

D) TO ENHANCE THE ACCESSIBILITY OF ISTANBUL TO POTENTIAL AND EXISTING VISITOR GENERATING COUNTRIES AND TO RETAIN ITS GATEWAY POSITION TO TURKEY

Action Point D1	Enhance the accessibility of Istanbul to existing and potential visitor generator markets. *(Mid- and Long-term)*	TCKTB LTA
Action Point D2	Encourage joint marketing of Istanbul with other domestic and European destinations to retain its gateway position to Turkey. *(Mid- and Long-term)*	TCKTB LTA Stakeholders

Istanbul is in a superb geographical position between Asia and Europe, which is often highlighted in the marketing activities of tourism organisations. In order to enhance the accessibility of Istanbul, the two airports based on the opposite shores of the Bosphorus should be developed further. Although the new international terminal has recently been completed and opened at the Ataturk Airport, the Asian-side Sabiha Gokcen Airport has been operating under its feasible capacity since its opening in 1999. The recent strategy by the TCKTB to improve the Galata Bay Port and its facilities for cruise ships should also be implemented without delay.

More importantly, however, the gateway position of the city needs to be retained, as Antalya, the city along the South coast surrounded by popular holiday resorts, has started to compete with Istanbul while receiving larger shares of international visitor arrivals every year. The only other city in the country with a convention and visitors bureau apart from Istanbul, Antalya is also aiming to attract business visitors in shoulder months to balance visitor fluctuations. Therefore, the leading tourist authority should co-operate mainly with the organisations in its tourism distribution channel and should conduct feasibility studies to measure likely advantages and drawbacks of presenting Istanbul with other cities such as Athens and Budapest in an international package and with Antalya in the domestic one. As a developing destination, Istanbul can benefit from being in the same package with other international city destinations or the domestic ones for the attraction of long-stay holiday market from long-haul visitor generators. This way while the cities within the same package would be working collaboratively to win visitors, they may diminish the adverse effects of competition between them. The *'Cool Capitals'* programme operated jointly by the leading tourism authorities of Amsterdam, Zurich and Vienna is an example of such initiatives to stimulate tourism growth in the participating cities. More importantly, this way a message emphasising Istanbul as a must-see destination in

Turkey would be delivered to potential visitors, while Antalya and Istanbul may cooperate to encourage visitors to stay longer in the country by being in the same package.

E) TO ENCOURAGE PRODUCT DEVELOPMENT TO STRENGTHEN THE COMPETITIVENESS OF THE CITY AS A TOURIST DESTINATION

Action Point E1	Distinguish between *'primary'* and *'secondary'* zones of tourism development. *(Mid- and Long-term)*	LTA IBB IGO
Action Point E2	Support the development of visitor accommodation in the long-term. *(Mid- and Long-term)*	LTA IBB, IGO, TUROB

As mentioned above, as an emerging city destination with already rich tourism offers, Istanbul does not require any new product development at this stage. The attention in reference to product development, therefore, should be initially paid into appropriate packaging of the existing offers in order to appeal wider market segments. While the city neither suffers from the compactness of its inner-city as in Amsterdam, nor from the concentration of tourism in central districts as in London, a *'multi-central'* characteristic clearly mitigates intolerable visitor concentration in certain districts of Istanbul. The problem in Istanbul, however, is that the tourist attractions, services and facilities are so widely dispersed that some cannot even attract an optimum number of visitors due to the lack of supporting products and facilities in their close proximity. A better connection network between attractions and tourist services should be achieved thorough the selection of particular zones for tourism development. Priority should be given to developments, which would support existing and new tourist areas with user-friendly transportation facilities, appropriate capacity of accommodating visitors and better information provision on isolated and underused attractions. While zoning regulations could help maintain overall urban environment quality, they would also add variety to the overall tourist package and enhance the scope to generate interest throughout the city. The recently introduced strategies to connect the Historic Peninsula with Beyoglu and Halic for the creation of a '*culture and tourist zone*' with improved pedestrianisation and street decoration should be initiated without delay and should be followed by other schemes to improve tourism movement at secondary zones.

With regard to accommodation outlets, the existing literature and the primary data collected for this research suggest that the accommodation stock of Istanbul meets the current demand and does not represent any threat to the physical capacity of the city. While a significant increase in hotel beds since the 1980s has prepared the grounds for the city to develop as a tourist destination, an immense growth in tourism development has not yet been achieved to suggest an urgent need to develop more accommodation establishments. However, the concerned authorities should monitor the growth of the tourism sector on an on-going basis with close scrutiny of future opportunities and should support the development of the accommodation industry in the long-term, particularly at the bottom-end of the market.

8.3.2. Management-Based Strategies

The second phase of the marketing model emphasises the importance of managing city destinations and the organisational structure of the tourism sector. As explained above, the prerequisites of successful marketing rests in several factors including: the orchestrating efforts of a leading tourism authority (LTA); partnerships established to create a one-voice approach; educating stakeholders and local community on the benefits of tourism development and encouraging their participation in the planning and implementation process, and; executing management practices within the framework of a collective strategic planning prepared on a local scale through effective decentralisation schemes. When Istanbul is evaluated from that perspective, the most urgent needs of the tourism sector seems to be the establishment of a leading tourism authority and the encouragement of sector stakeholders to cooperate with each other. As shown in Table 8.4, the lack of confidence on the capability of the existing tourism authority to undertake necessary actions and to develop and market Istanbul as a total package offer was mentioned by 17 interviewees. Similarly, while 11 interviewees stated that sector stakeholders should be involved in more joint projects, the code "*bottlenecks of partnerships*" attached to 9 quotations indicates the misconceptions of sector stakeholders on the efficacies of collective tourism development and marketing. These codes and quotations are discussed in detail in the related sections of Chapter 7. In light of this information and the key components of the marketing model, the management-based aims for Istanbul and their associated sub-actions can be listed as follows:

A) TO SUPPORT THE ESTABLISHMENT OF A NEW TOURISM BOARD AND TO EMPOWER IT WITH AUTHORITY TO ACT AS THE SECTOR LEADER

Action Point A1	Restructure the Istanbul Tourism Directorate with radical changes to its organisational structure or establish a new organisation to act as the sector leader. *(Short-term)*	TCKTB IBB, IGO Stakeholders
Action Point A2	Implement decentralisation schemes immediately to empower the new organisation with relevant and adequate responsibilities and resources. *(Short-term)*	TCKTB IBB, IGO
Action Point A3	Appoint professionals and experts to form an effective organisational structure for the new LTA and to employ other qualified personnel. *(Short-term)*	TCKTB IBB, IGO

The Istanbul Tourism Directorate (ITD) has been established under the jurisdiction of the Governor of Istanbul and complies with the strategies and policies of the TCKTB on a local-level. The centralised policy making leaves the ITD with a relatively minor role, which, in most cases, does not enfold more than the preparation of annual tourism inventories, the inspection of service qualities in tourism establishments and the distribution of the promotional leaflets and brochures designed and published by the TCKTB. It seems unlikely that the ITD could accomplish its expected role to become a strategic leader of the tourism sector and to bring the concerned authorities together to achieve corporate goals, given its inflexible organisation structure and limited responsibilities. In addition to the fact that the Directorate has not prepared strategic plans for tourism in Istanbul, bureaucracy and unskilled personnel comprising civil servants, conflict with the essential prerequisites of a powerful and effective tourism authority.

The current strategies of the Government to move from centralized national tourism planning to decentralized destination development and marketing should be accompanied by the establishment of a new organization with arms-length responsibilities not only over the sector, but also over the whole urban network of Istanbul. It is important to note that when the LTA is included among the key authorities responsible for the implementation of the action points proposed in these sections, it is not meant to be the ITD, but a new LTA.

The leading tourist authorities of London and Amsterdam have recently gone through transformation processes to strengthen the tourism management network and to increase the competitiveness of the case study cities. Indeed, the need to establish a leader organization is especially imperative for tourism due to the fragmented organizational structure of the sector and the need for an integrated approach in development and marketing policies. While the new leading tourism authority (LTA) of Istanbul should be responsible for the identification of corporate priorities of the sector and to stimulate projects to nourish tourism flow to the city through the preparation of strategic development and marketing plans, its primary aim should be to secure consistency through the introduction of long-term objectives and goals.

The organisational structure of the LTA must consist of skilled and professional experts capable of carrying out various activities ranging from information distribution to consultancy services to suppliers and, from lobbying governments on the problems and expectation of the stakeholders to conducting destination-based market research. As in the case of Visit London, the new organisation could as well be appointed to deliver marketing strategies of another city-wide authority *–i.e. IBB or IGO-*, but should play proactive roles in the decision-making and planning processes. Private organisations could be encouraged to become members of the new LTA in order to generate both public and private financial sources required for its operation, but also for the acknowledgement of its role as the sector leader by the stakeholders. In terms of marketing, the role of the organisation should be to instigate measures in the interest of the tourism sector, especially the coordination and execution of all promotional activities.

There is no doubt that national tourism strategies prepared by the TCKTB would affect the local planning process of Istanbul. Therefore, the LTA should co-operate with the Ministry and should make sure that local tourism strategies are in line with the national economic, social and environmental policies as well as the tourism ones. In fact, governments' influence on the local planning process should not be overlooked given the need for public funds, loans and aids for the effective functioning and development of tourism in the city.

B) TO ENCOURAGE SECTOR- AND CITY-WIDE PARTNERSHIPS FOR CO-OPERATIVE TOURISM DEVELEOPMENT AND MARKETING

Action Point B1	Organise regular and frequent meetings on the benefits of creating a one-voice approach. *(Short and Mid-term)*	LTA Stakeholders
Action Point B2	Work in close cooperation with sectoral associations and foundations. *(Short-term)*	LTA Stakeholders
Action Point B3	Encourage the establishment of new project-based partnerships among stakeholders. *(Short- and Mid-term)*	LTA Stakeholders
Action Point B4	Encourage the establishment of systematic partnerships between sector stakeholder and other urban authorities to deal with city-wide problems. *(Short- and Mid-term)*	TCKTB IBB, IGO Stakeholders
Action Point B5	Secure consistent and efficient amount of public and private sector funds available for tourism development and marketing. *(Short- and Long-Term)*	LTA TCKTB Stakeholders
Action Point B6	Encourage private sector investment and entrepreneurship in tourism. *(Mid- and Long-term)*	LTA TCKTB IBB, IGO

The interview findings from Istanbul show that the reasons why the city has lagged behind Amsterdam and London in terms of an integrated approach toward tourism marketing and development revolve around red-tape and top-down administrative system in the public sector, which restrict local authorities to become partners of strategic alliances and partnerships. In addition, the interviewees mentioned the changing political agendas of consecutive governments as the factors causing confusion over the areas each government pays attention to. Therefore, there seems to be lack of confidence in any partnership established by local authorities to serve the aims and objectives of the tourism sector and whether it would be of a permanent nature or would be eradicated by the successor government in the future.

Despite the fact that the lack of co-operation among sector stakeholders and their contribution to the policy-making procedure remain as impeding factors for the optimal growth of tourism in the city, the interviewees acknowledged the benefits of partnerships, including: the accelerated tourism growth; the accomplishment of shared objectives; pooling administrative and financial resources to gain economies of scale; the creation of a one-voice approach in marketing activities; the exchange of trade information between member organisations; lobbying sector needs and expectations to governments and; the organisation of education seminars and training programmes for partners. Therefore, the new LTA free from bureaucracy and capable of becoming a strategic leader, should work closely with the private sector and local communities for their cooperation and support of city tourism policies and should encourage partnerships among sub-industry representatives and other key urban network players.

To this end, while the new LTA should arrange regular sector-wide meetings assessing the needs and expectations of stakeholders, it can also ask for the assistance of powerful sectoral associations and foundations such as the Union of Turkish Travel Agents (TURSAB) and the Turkish Hotels Association (TUROB) in bringing tourism organisations under the same umbrella. In fact, the interview findings from Istanbul suggest that the tourism organisations are not fully aware of how establishing a one-voice approach in marketing and development activities would help their organisations and that there are not enough education programmes and seminars run collaboratively by the associations representing different sub-industries. The LTA should play a proactive role in organising such seminars and workshops not only to promote networking among the stakeholders, but also to augment their marketing and customer-relation skills. Similar education policies should also be used to provide urban and governmental authorities with prompt and appropriate information on the critical importance of promoting and maintaining the city's tourism sector. Joint efforts with such authorities is also crucial to deal with city-wide problems such as traffic congestion and unemployment.

While there is no doubt that such partnerships would assure the participation of both the sector and other concerned urban actors in the planning and marketing processes, the financial shortage of community funds for tourism represents a further barrier to the development and marketing of the sector in Istanbul. The Greater London Authority has funnelled large sums of public funds into the effective management and promotion of London as a tourist destination especially after the damaging effects of consecutive crises. Similarly, the private Amsterdam Tourist Board is provided with annual budget allocations by the City of Amsterdam as well as the financial contribution by private sector members. One of the primary aims of the LTA in Istanbul, therefore, should be to acquire sufficient financial support to adequately implement and manage the city's role in tourism development. While the TCKTB should allocate consistent and sufficient budget allocations to the new organisation in the process of decentralised tourism planning and marketing, the financial assistance of private sector is also imperative and can be stimulated through the applications of destination-based cooperative marketing.

Finally, it is essential that private capital should be attracted into tourism in order to increase the financial sources available for product development and marketing. The local authorities should provide monetary initiatives to new private investors, which could help establish a professional teamwork approach and market-oriented planning within the overall tourism management network of Istanbul. As discussed above, some of the publicly run tourism attractions can no longer provide sufficient services and fail to meet the changing needs and wants of visitors, while most lack financial sources and professional management to execute product development and improvement policies. The sector leaders and local authorities should introduce new subsidies and initiatives to increase private sector input into the attraction industry.

C) TO ORGANISE EDUCATION SEMINARS AND MEETINGS FOR TOURISM STAFF AND THE LOCAL COMMUNITY

Action Point C1	Encourage tourism education, career development and vocational training at all levels of the education system. *(Mid-, and Long-term)*	LTA, Stakeholders
Action Point C2	Initiate seminars and workshops to educate local residents about tourism and develop an understanding of the sector's positive effects upon the city. *(Mid- and Long-term)*	LTA Stakeholders

As a developing destination, Istanbul needs skilled and bilingual personnel to help raise the quality of tourist products and services. With the potential to actualise the target of increasing visitor numbers by consistent and effective tourism development plans in the future, it is thought that there would be a further need for qualified staff to be employed in the sector. Therefore, the LTA must: provide sector-wide training and employment advice services; work in co-operation with higher-education institutes and universities to revise their curriculum according to the changing characteristics of the sector and; encourage tourism organisations to involve in vocational training schemes for new graduates.

One of the strengths of Istanbul is the hospitality and friendliness of local residents toward visitors. Although the city is perceived as a chaotic destination among potential visitors prior to their arrival, such perceptions change remarkably once the friendly approach is noticed and experienced by international visitors during their stay. Besides, the current modest number of visitors is yet to cause community opposition on further tourism development in the city in the same way that Amsterdam and Central London has experienced in the past. The only concern regarding the attitudes of residents towards the sector and visitors, meantime, was raised by the interviewees in relation to the biased conception of the visitors from the Eastern European and Russian markets among the local people. In order maintain the Turkish hospitality as a strength, the LTA must organise education seminars and workshops: to boost civic pride and; to stress the economic, social and environmental benefits of tourism development. Community participation in tourism development should also be sought through the co-operation with district municipalities in the decision-making process.

D) TO EXECUTE NECESSARY MANAGEMENT PRACTICES TO SECURE LONG TERM SUCCESS OF ISTANBUL AS A TOURIST DESTINATION

Action Point D1	Develop a tourism impact management system to help insure that tourism activities are in harmony with the social, economic and physical development of the city. *(Mid- and Long-term)*	LTA IGO, IBB Stakeholders
Action Point D2	Develop tourism contingency plans to be employed should a serious market decline occur. *(Mid- and Long-term)*	LTA, IGO Stakeholders

As mentioned above, the major urban dilemmas faced by Istanbul are not tourism-oriented, but relate to the unplanned and ill-managed development of its broader economic, physical and social environments. While the new LTA should lobby governments and other public authorities on the needs of the sector and its development, it should also constantly observe and detect potential opportunities for the use of tourism as a catalyst in urban regeneration schemes. Tourism plans must be harmonised with the unitary land, housing and building developments of the Municipality and the Governor's Office, while the districts, where tourism is among the leading economic sectors, should be encouraged to enhance the quality of environment and living. The LTA should aim to encourage urban infrastructure development; and to raise the living standard of the local residents as well as visitors through the economic benefits of tourism. In the process of optimising visitor satisfaction, the potential negative impacts of tourism should be alleviated appropriately and systematically through corporate action taking with other urban authorities.

In addition, the new LTA should not ignore the fact that tourism growth in Istanbul has been, in the past, interrupted by a number of negative events including the 1999 Izmit Earthquake, consecutive economic recessions and terrorist attacks. The adverse effects of crises is most evident in the case of London following of the 9/11 terrorist attacks in 2001, which resulted in sudden and remarkable decreases in visitor numbers to the city. Since it is not likely to offset such damaging events with ad hoc solutions, the LTA, private sector and all other key organisations of the urban network must work in co-ordination for the establishment of a Crisis Management Team and for the creation of a number of tourism contingency plans in line with possible crisis scenarios. Moreover, the LTA should co-operate with the stakeholders and local security forces in introducing various protection measures and tools to assure visitors of their safety during their stay in the city.

8.3.3. Promotion-Based Strategies

The final phase of the marketing model mainly refers to the promotion of a city product package. As mentioned above, promotion activities strongly rely on the characteristics of the product defined and the aims, objectives and organisational structures of the destination marketers in charge. In the final stage, therefore, the promotional efforts are finally directed at selected target markets, which can only be determined through explorative and comprehensive marketing research on potential and existing visitors. Based on the results of such a demand analysis, the competitiveness of the destination concerned should be strengthened, while reaching market segments with most effective and influential marketing tools. Considering the limited research activities of the present leading tourism authorities in Istanbul, it is argued in this research that the promotion-based strategies should initially focus on marketing research, which would then lay the grounds for the rest of the strategies, which all should be integrated into a strategic marketing plan. As shown in Table 8.3, the foremost concern of the interviewees with 18 quotations was the lack of marketing plans both on an individual business scale and on a destination one. Harmonising product-, management-, and promotion-based strategies in such development and marketing plans should be prepared and implemented by all tourism stakeholders, while the new LTA should be equipped with appropriate responsibility and authority for the preparation of a city-wide plan structured in close cooperation with sector stakeholders. In light of this information, the promotion-based aims of a probable strategic plan for Istanbul and their sub-actions can be suggested to include the following:

A) TO ESTABLISH A DATABANK TO ANALYSE EXISTING AND POTENTIAL VISITOR PROFILES

Action Point A1	Redesign research methodology for collecting visitor information and expanding its scope to cover their characteristics and satisfaction level as broadly as possible. *(Short- and Long-term)*	LTA TCKTB DIE Stakeholders
Action Point A2	Collect the information obtained by such research activities and the ones undertaken by sector stakeholders in a databank for present and future analysis of demand characteristics. *(Short- and Long-term)*	LTA TCKTB DIE Stakeholders

As mentioned above, only by conducting marketing research can city marketers decide which market segments to be attracted and which ones to be discouraged from visiting their city. Valuable information on travelling motives of visitors, major generating markets, perceptions of visitors about the city and its attractions, demographic characteristics of visitors and attitudes and behaviour of visitors during their stay in the city can only be obtained through extensive marketing research. According to the results of in-depth marketing research, marketing activities can be directed toward the markets in which residents would fit into the market portfolio of the destination marketed. In Turkey, the National Institute of Statistics (DIE) is the main authority and collaborates with the TCKTB for its tourism-related surveys. However, the scope of tourism statistics is limited in Istanbul and lags behind the other case studies, especially in respect to domestic tourism. The LTA should work in co-operation with the DIE and the TCKTB to expand the context of existing tourism research and visitor satisfaction studies and should monitor success and performance by seeking the views of visitors and acting quickly to make any changes that are necessary. Establishing a department solely responsible from research and marketing development activities, as in the case of the Amsterdam Tourism Board, would help the new LTA to analyse the growth of tourism in Istanbul, where the necessary precautions needed according to changing demand characteristics can be supported with systematic and valuable research findings kept in a databank.

B) TO DETERMINE THE COMPETITIVE ADVANTAGES OF ISTANBUL AND INVOLVE IN IMAGE MARKETING

Action Point B1	Recognise scope of '*competition*' both in domestic and international visitor markets. *(Short- and Long-term)*	LTA TCKTB
Action Point B2	Build up a positive destination image with an emphasis on one-voice approach. *(Short- and Long-term)*	LTA Stakeholders
Action Point B3	Develop and promote a citywide '*brand*' as a unifying, coordinating and reinforcing marketing mechanism. *(Short- and Long-term)*	LTA Stakeholders
Action Point B4	Achieve consistency in advertising campaigns to strengthen the image and the recognition of corporate marketing activities. *(Mid- and Long-term)*	LTA Stakeholders

As discussed in Chapter 3, city destinations face tougher competition than ever before due to several factors, which include an increasing number of destinations investing in tourism development; technological developments making remote locations accessible places; changing characteristics of tourism demand with more free time and holiday alternatives available for potential visitors and; the recent phenomena of collaboration through sector-wide partnerships making tourism management networks cost and time effective in their systematic approach to marketing.

In order to execute effective marketing activities, the LTA of Istanbul must frequently assess the position of the city among the leading urban destinations, which, as a result, would help establish efficient strategies regarding tourism development, product branding and promotion. So far, Istanbul has been an exotic, but relatively unknown destination in comparison to European destinations including Amsterdam and London. While the main reasons for vague perceptions associated with the city as a tourist destination include lack of strategic development plans and inconsistent marketing activities failing to create a destination brand for Istanbul in the past, the LTA and sector stakeholders must closely observe the competitive tourism market and must hold idea-exchange-meetings with international tour operators and travel experts to enhance the competitiveness of the city.

The image of a city as perceived by potential visitors is arguably one of the most important factors influencing the competitiveness of the destination. As the case of Amsterdam denotes, a well-established negative image is difficult to be reversed in the short-term, while its damaging effects on the tourism sector could last for years. Istanbul was also found to suffer from a negative image in this research. While the interviewees argued that Istanbul is perceived as an unsafe and chaotic destination by potential visitors mainly due to terrorist attacks and political conflicts in the surrounding international region, the primary data findings further suggest that the pre-arrival negative attitudes and perceptions of visitors improve during their actual city. The LTA should identify the primary image constituents of the city according to the strong aspects of its product package, and should strive for an overall consistent and desirable image. As mentioned above, the findings of this research suggest that the destination image of Istanbul should particularly signify its rich heritage and cultural offers in order to draw attention to its uniqueness. The LTA should also conduct an umbrella program at the city level to encourage sector stakeholders to associate their individual brands with the overall image, and to help disseminate a single clear message to potential visitor markets.

Once the image constituents and *'themes'* of Istanbul are selected, the LTA should concentrate on positioning the tourist offer under a unified destination brand. Both the VVV and VLL have been investing in branding Amsterdam and London as marketable destination commodities respectively through the introduction of marketing slogans and logos, which aim to enhance the perceived image and awareness of the cities by potential visitor markets. In Istanbul, the LTA may create a new destination logo matching the messages of the campaign *'Istanbul: Timeless City'* (see Chapter 7). This first ever campaign specifically focusing on Istanbul as a tourist destination was initiated in 2003 by the Ministry of Culture and Tourism (TCKTB) and was carried out in the USA and Europe. The campaign has aimed to distribute the message that Istanbul is an exotic and mystic destination with a unique culture and history at the doorstep of Europe.

In any case, the instruments used to promote the Istanbul brand should be maintained to create a long-term impact, while sector stakeholders should be encouraged to use the destination slogan and logos in their marketing activities. More importantly, however, future advertising campaigns should consistently emphasise on the same strengths and should repeatedly use the same Istanbul logos and slogans to create a long-lasting impact among potential visitors.

C) TO IDENTIFY EXISTING AND EMERGING TARGET MARKETS IN ORDER TO CONDUCT MARKETING ACTIVITIES ACCORDINGLY

Action Point C1	Establish a fair balance between domestic and international tourism marketing. *(Short- and Long-term)*	LTA Stakeholders
Action Point C2	Categorise target segments according to the main purpose of travel and initiate separate marketing campaigns for different markets. *(Short- and Long-term)*	LTA ICVB Stakeholders

Due to the centralised tourism planning executed by the TCKTB, the main visitor generators for promotional purposes is yet to be identified for the tourist offer of Istanbul. The analysis of secondary and primary data indicates that the visitors from the USA and the Western Europe are among the leading market segments of all the cities studied albeit with differences in order of importance. Although the distribution of visitors according to the generator markets portrays a relatively balanced picture in Istanbul compared to US-dependent London and UK-dependent Amsterdam, there seems to be a need to analyse the characteristics of each market segment and to identify new potential visitor generators for the city. The LTA should run systematic market surveys supported by appropriate marketing activities in each target market and should aim to further prosper the potential of Eastern Europe, Middle East and Far East countries as visitor generators.

Meantime, the five quotations attached to the code "*ignorance of domestic tourism*" denote the concern of sector stakeholders on the uneven balance in marketing activities between the international and domestic markets. In fact, among the case study cities, Istanbul is far behind the other two with regard to the development and marketing domestic tourism. Since the discovery of tourism as an income generator sector in the 1980s, tourism has always been assessed within the concept of international visitor movement by the concerned public authorities, while the potential of domestic tourism has been neglected. Yet, it is often much easier to operate on domestic markets, since it is both cheaper to conduct marketing activities and also more likely to inform potential visitors on the up to date opportunities that a city offers. As shown in the case of London, domestic market also has a considerable capability of substituting international ones during crises times. The LTA of Istanbul should work in co-operation with the sector to investigate the potential of domestic tourism and should develop separate marketing strategies for the development of this market segment.

More specifically, the segmentation approach according to the main motive of travel helps city marketers and decision makers to identify the particular needs and expectations of diverse market segments, which can be fulfilled appropriately and effectively by suitable product packages. So far, Istanbul has been promoted as a total destination offer, while it would be more effective to run separate marketing activities for cultural visitors, shoppers, business travellers and conference organisers. While the Istanbul Convention and Visitors Bureau (ICVB) aims to specialise on the development and marketing of business tourism to the city, the LTA should produce different publications serving to the specific needs of diverse target markets, such as *'The Shop London Guide'*; *'The Royal London Guide'*; *'Entertainment and Leisure in London'* and; *'Study London'* published by Visit London. The strengths of the tourist offer identified by this research underlines the importance of heritage, culture, business and shopping tourism in Istanbul (see Table 8.5) for which appropriate and effective marketing activities could be undertaken in line with the overall aims of a proposed strategic plan to be developed by the new LTA. In determining the priority to be paid to any of these specific market segments, the collective benefits of sector stakeholders as well as the city-wide tourism development plans should be taken into account.

D) TO USE VARIOUS MARKETING TOOLS TO DELIVER CONSISTENT AND RELAVANT MESSAGES TO TARGET MARKETS

Action Point D1	Publish and distribute a wide range of visitor information guides, brochures and leaflets. *(Short- and Mid-term)*	LTA Stakeholders
Action Point D2	Increase the appeal of Istanbul as a tourist destination at international travel markets and fairs. *(Short- and Long-term)*	LTA TCKTB TURSAB
Action Point D3	Organise familiarisation trips for tour operators and travel writers. *(Short- and Mid-term)*	LTA Stakeholders
Action Point D4	Develop an official website for on-line marketing of Istanbul and search for new innovative marketing tools. *(Short- and Mid-term)*	LTA
Action Point D5	Involve in public relation activities to increase visitor satisfaction and to build up a customer database. *(Short- and Long-term)*	LTA Stakeholders
Action Point D5	Improve the services offered by the Tourist Information Centres (TICs) through the employment of qualified staff fluent in foreign languages. *(Short- and Mid-term)*	LTA Stakeholders

The written material on Istanbul and its tourism sector available to existing and potential visitors is limited in comparison to the publications of VVV in Amsterdam and the VLL in London. The TCKTB publishes the *'Istanbul Tourist Map'* and the *'Istanbul and Its Environs'* brochure embracing all of tourist products and recreational opportunities of the city. The range of brochures should be expanded and published in several languages. Designing new brochures on: alternative accommodation opportunities; eating places; entertainment; up to date event calendars and; how to travel within the city may be listed among suggestions. Similarly, upon the identification of main market segments according to the purpose of travel, promotional material on heritage, culture, shopping and entertainment attractions and facilities should also be distributed especially in major tourist zones, in leading visitor attractions, at tourism information centres and the main terminals and stations.

The LTA should also consider attending the leading travel markets with its own stand to promote the city to tour operators in the target visitor generator markets. In fact, The TCKTB puts great importance to travel fairs and exhibitions held across the world. Although it is the national tourist product, Turkey, which is marketed with its own stand in such fairs by the Ministry, Istanbul is presented as one of the most important gateway destinations to the country. The new LTA should work in close co-operation with sector stakeholders and partnerships, such as the Union of Turkish Travel Agents (TURSAB) to create awareness of its tourist offer among intermediary organisations.

The other promotional tool used most by the case study cities is familiarisation trips (*see Table 8.3*). The foremost benefits gained by a city destination in organising such trips are that they are cheaper than advertising campaigns and that they fulfil an objective, namely relatively more credential media coverage of its product package than paid advertisement provided by the destination marketers. The LTA of Istanbul should invite tour operators and travel writers from the leading and emerging visitor generator markets on complimentary trips organised in joint effort with sector stakeholders.

The Internet, meantime, is one of the fastest growing IT services and is now widely used as a marketing medium by city destinations. The main reason for such steep growth of Internet use, is that it allows its users to transmit information on a global scale at a cheaper price than other communication methods. The LTA should immediately launch its easy-to-browse and appealing official website to direct potential visitors to on-line links, where they can obtain information suiting their individual interests and needs, and to keep visitors with up to date information. While the website should be viewed in several languages, the site users should be encouraged to register onto the online databank for marketing purposes. The on-line accommodation and flight booking would also help shorten the decision-making process by potential visitors. The LTA should further investigate the potential of other innovative tools in marketing such as the *'I amsterdam card'* and *'Timespots Amsterdam'* device used to promote Amsterdam by the VVV.

The interview findings of this research also indicate that public relation activities by destination marketers are especially imperative for the attraction of international conferences and special events to city destinations and during crises periods to counterattack negative media coverage. In order to cope with the inquiries of the existing visitors; to minimise their dissatisfaction with the purchased holiday packages; to generate favourable publicity and; to keep all users of the destination product with up to date information, the LTA should involve in effective and coherent public relation activities. The feedback collected from visitors could also help the organisation to build up a customer database to be used in other marketing activities.

Finally, the function of tourist information as part of the tourism product is particularly important in respect to welcoming visitors and dealing with their inquiries. Currently, there are six TICs operated in Istanbul by the Ministry of Culture and Tourism, which are located at major tourism zones and transportation nodes. While the Ministry should consider appointing the new LTA with the responsibility of managing these centres, their services should be improved with information available in different languages and qualified staff capable of dealing with all sorts of inquiries. The use of modern technology should be encouraged where it helps to enhance the service given to visitors by ensuring accuracy and extent of information through the use of computerised information and booking systems.

To conclude, no matter which strategies are given priority and which tools are selected for the most effective promotion of Istanbul, the success rests in the application of strategic marketing with short-term action plans integrated into long-term objectives. The LTA should constantly monitor the changing characteristics of both supply and demand for best practices. The prerequisite of Istanbul to emerge as a *'winner'* destination relies on the creation of a one-voice approach appreciated and utilized by sector stakeholders and other key members of the urban network, which has been ignored by the concerned authorities up until the present day.

8.4. Conclusion

Cities are not static organisms, but are constantly in transition. Urban management must deal not only with growth and decline in the city, but also with a constantly changing set of internal and external dynamics. In order to keep up with these changes, the tourism sector should also be equipped with effective management network and techniques. In the fiercely competitive international tourism market, more cities have been attempting to become *'winner'* destinations than ever before in order to activate the *'catalyst'* role of the sector in urban regeneration projects.

This research has mainly aimed to define the concept and development process of city tourist destinations as marketable product packages; to ascertain the marketing activities of public and private tourism organisations, and their combined efforts to strengthen the market position of the tourist product packages of city destinations and; to develop criteria to identify the general steps of a strategic marketing model for urban areas. The case studies of Amsterdam, London and Istanbul have provided detailed analysis and information regarding the management and functioning of the tourism sector in the cities and helped identify the steps of a universal destination marketing model. Since any research on urban geography needs to deal with the complex structure of urban settlements, where interdependent components provide insight to the whole, the grounded theory has been adopted in this thesis covering as many related aspects of destination management and marketing as possible subject to research limitations. Within this framework, the tourism management systems of cities, their competitiveness, the analysis of their tourist offers, the marketing tools used most to market the cities and their approach to strategic marketing have been assessed and discussed with the support of both secondary and primary data collected in the case studies.

While most research in the existing literature highlight the importance of partnerships in destination marketing, the findings of this research supports the argument that leadership and decentralisation are as important as collaborating for the cooperative marketing on a local scale. With regards to the management of the case studies, it was discovered that all of the leading tourism authorities have been going through some transformation process either in the form of restructuring their organisational structure with changing responsibilities and tasks, or in the form of diverting their responsibilities to other organisations. All, however, make it clear in their official publications that their success relies on the involvement of all stakeholders in the planning process. Since cities are not static organisms, but are constantly in transition, one would expect the tourism management systems of urban environment to continue to create better organisational structures to manage, develop and market the tourism sector.

With regards to the competitiveness of cities, a number of conceptual models and approaches have been explored in this research, which show that empirical studies and results related to testing and validating the proposed models have been limited in the existing literature. Particularly, the development of destination competitive strategies has not been thoroughly addressed. Moreover, it has not been found which competitive strategies are more supported by tourism stakeholders. By underlying the key issues of a three-phase model, this research focuses on the support of tourism stakeholders, who could aid in the design and selection of competitive strategies for tourism destinations, which as a result, could enhance competitiveness as well as provide social/economic benefits and welfare to the urban areas.

Finally, this research aimed to identify differences between developing and developed countries when marketing city destinations. It was found that the primary difference rests in the management and marketing of Istanbul, where various urban dilemmas fight for public monies alongside tourism. Although tourism is used as a catalyst in all case studies, it relies more on economic and political stability of the country in the case of Istanbul, while uniqueness of the tourist offer seems to be the foremost prerequisite of a successful destination.

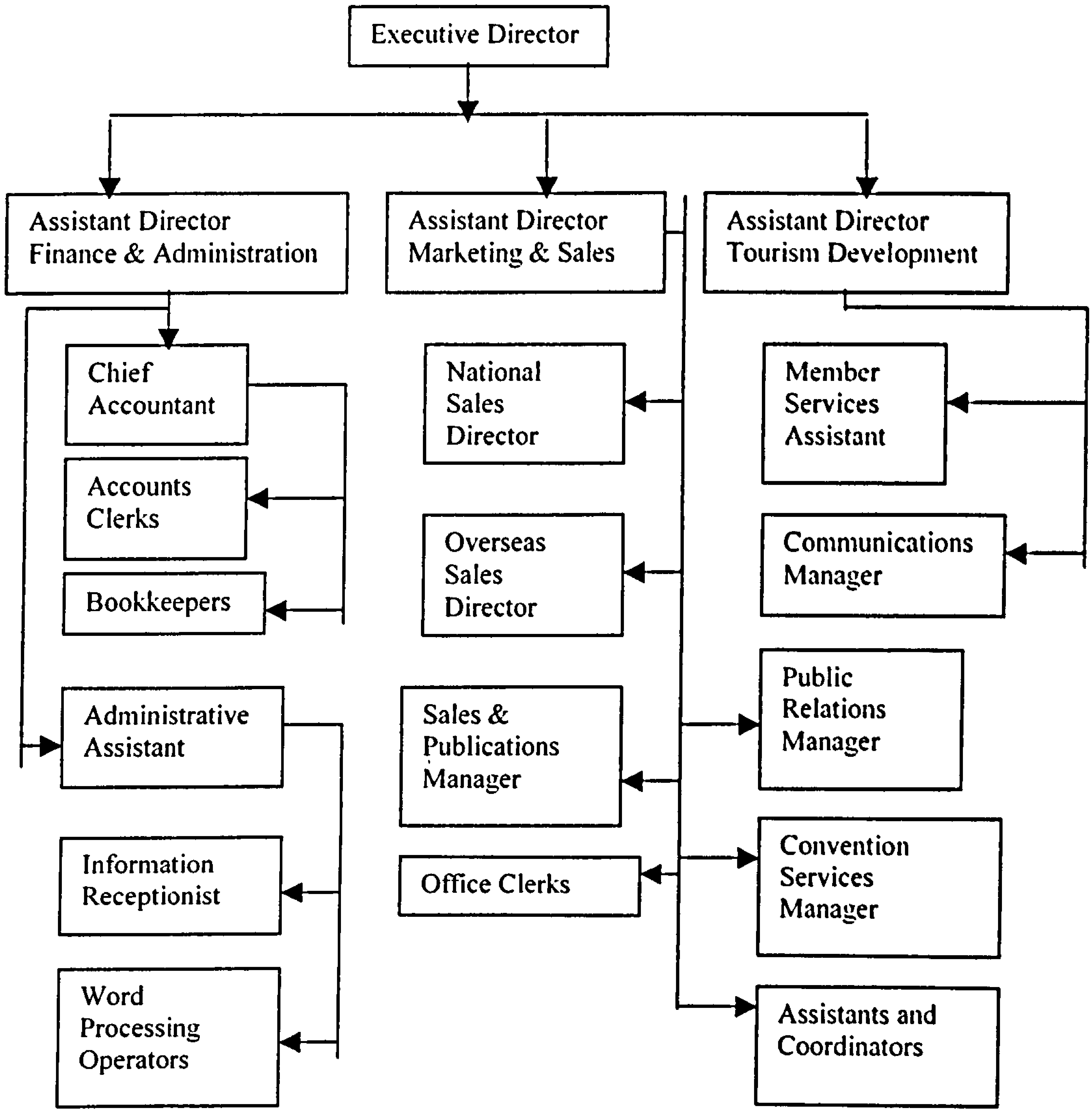
APPENDICES

Appendix 1. Examples of urban imaging strategies in various countries

City	Components of Urban Imaging Strategies
Sydney	Darling Harbour redevelopment, cultural tourism, special events, winning bid for 2000 Summer Olympic Games
Glasgow	Exhibition and conference centre, art gallery, cultural promotion, garden festival, 'Glasgow's Miles Better' campaign in mid-1980s, Mr Happy of Glasgow, 'European City of Culture' in 1990
Manchester	Exhibition centre, museums, heritage walks
Atlanta	Winning bid for 1996 Olympic Games, a new slogan; 'The World's Next Great City', a regular promotional magazine produced by the city's convention bureau; 'Atlanta Now'
Michigan	'Say Yes to Michigan!' campaign started in 1982 and was shortened as 'YesM!ch!gan' by 1986
Hamburg	The image campaign 'High Point in the North' and celebrations for the 800th Anniversary of the Port of Hamburg

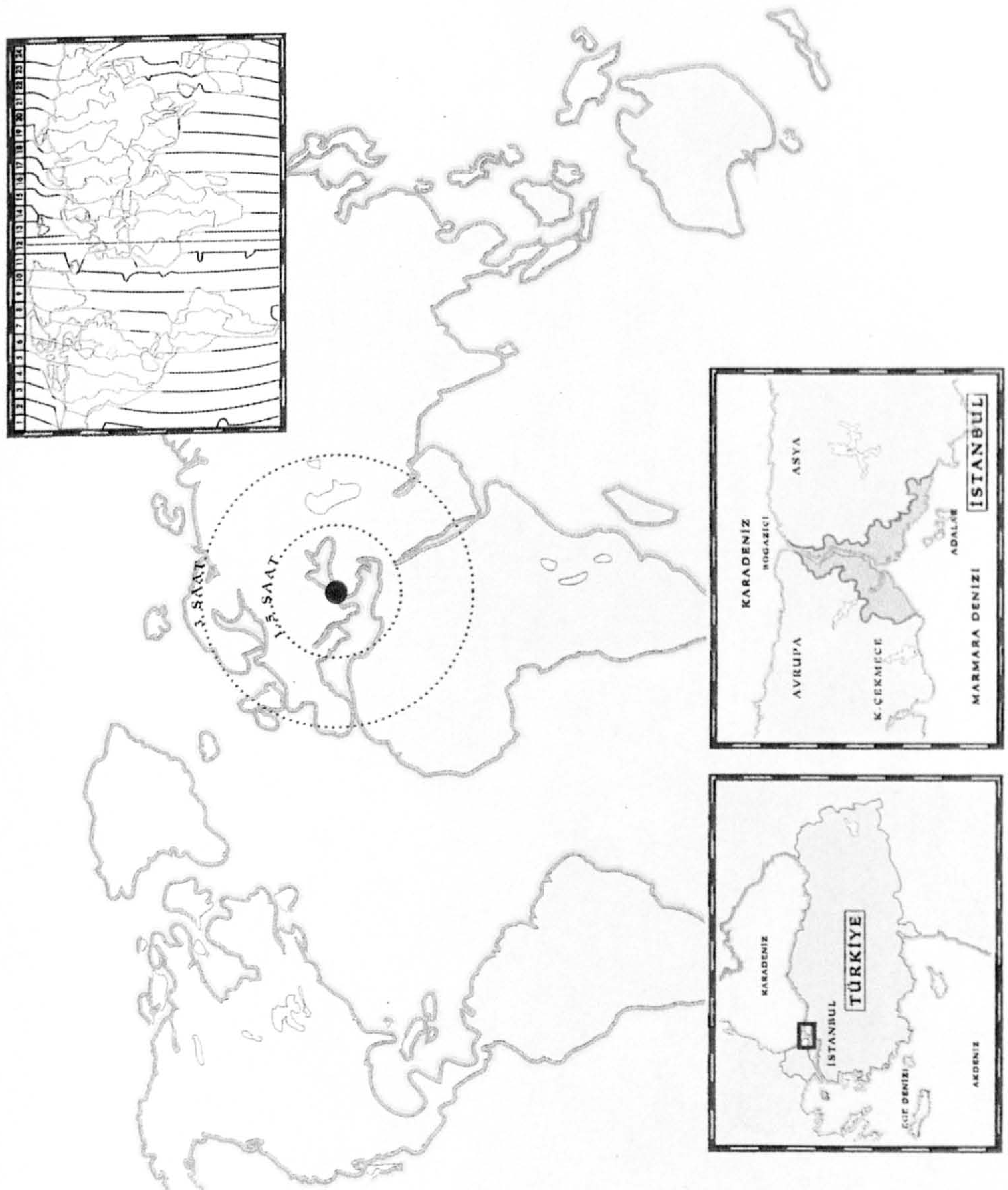
Sources: Hall (1994); Crilley (1993); Holcomb (1993 and 1999); Krantz and Schatzl (1997); McCleary (1987); Ward (1998).

Appendix 2. A Sample Organisational Chart of a Visitor and Convention Bureau



Source: Gartrell (1994).

Appendix 3. Istanbul in the World



Appendix 4. The Chronology of Istanbul

Year	Event
650 BC	A tribe under the leadership of Byzas settled in Istanbul and called their new state 'Byzantion'.
328	Istanbul becomes the capital of the Eastern Roman Empire and is named after the Conqueror Constantine I: Constantinapolis.
392	Constantine introduces the Christian faith to his citizens, and churches, and monasteries start to be built in Constantinapolis.
537	With the order of Emperor Justinian, Hagia Sophia, the largest church in the world at the time, was built.
1204	The armies of the Fourth Crusade invaded the city and destroyed its churches, monasteries and monuments.
1453	The conquest of Istanbul by an Ottoman Emperor Sultan Mehmet II.
1456	The construction of the bedesten (shopping mall), which was to form the first nucleus of the Grand Bazaar of the present day, was begun. By 1490, the Bazaar contained 641 shops including 76 jewellers, 50 tailors, 44 sellers of headgear and 66 shoemakers.
1457	Istanbul became the capital city of the Ottoman Empire.
1470	The Topkapi Palace, which was the official residence of Ottoman Sultans, was built on the Historic Peninsula.
1616	The Sultanahmet Mosque (also known as Blue Mosque) was completed with a complex of buildings for education and social activities.
1838	The first pedestrian bridge was opened at Unkapani linking the Historic Peninsula to Karakoy.
	The first steamship was constructed in the Golden Horn.
1844	The Ottoman government founded the company known as the Fevaid-i Osmaniye for the provision of water transport for passengers between the shores of the Bosphorus. By 1850, there were two ferryboats, each making four trips a day.
1845	The initial municipal organisation was established for Istanbul.
1855	A Sehremaneti (urban prefecture) was set up on the model of European municipal organisations with the whole city divided up into fourteen municipal districts.
1856	The Dolmabahce Palace was completed and used as a new residence by Sultans instead of the Topkapi Palace.
1874	The railways between Edirne and Istanbul, and Istanbul-Izmit were opened. The construction of one of the oldest urban underground railways (Tunel) in the world was completed.

Year	*Event*
1887	The Sirkeci Rail Station on the European shore was built.
1889	The first direct Orient Express line between Paris and Istanbul was opened.
1891	The famous painter and archeologist Osman Hamdi opened the Imperial Museum (Muze-i Humayun) to the public.
1908	The Haydarpasa Rail Station was completed on the Anatolian shore of the city. The first motor car entered the city.
1923	The foundation of the Republic of Turkey and the deportation of the Sultan and his family.
1926	Scheduled bus services were introduced as a mode of public transportation.
1969	The Istanbul Culture Centre was opened. The centre was burnt down by a fire in 1970, and was re-opened after 8-year restoration with a new name: Ataturk Culture Centre.
1973	The Bosphorus Bridge over the Bosphorus Strait was officially opened.
1974	The 5-Star Intercontinental Hotel was opened in Taksim.
1988	The second bridge across the Bosphorus, the Fatih Bridge, was completed and opened to traffic.
1996	International Habitat II conference was held in the city. While the leaders of many countries were invited to the conference, the main discussion topic for the Istanbul summit was 'The Liveability of Urban Areas'.
2001	After losing 2000 and 2004 Olympic Games Bids to Sydney and Athens respectively, Istanbul bids to host the 2008 Olympic Games.

Sources: Kuban (1996); ITO (1997); Kilincaslan (1996); Kuruyazici (1998); TETOV (1996).

Appendix 5. A sample interview letter

The name of an interviewee

(The address)

Date

Dear Mr/Mrs/Ms ....,

I am a Research Student at the Bournemouth University, studying for a PhD degree in the field of Tourism Management. My research investigates 'Marketing City Destinations for Tourism' and is supervised by Prof. Stephen Wanhill and Mr Stephen Calver.

With this research, I aim to observe and classify the marketing activities of the public and private tourism organisations in urban areas. Hopefully, I will be able to develop optimal strategies and methods for the effective marketing of city destinations, when the all necessary background and primary data collection has been completed. The case study cities of this research are chosen as London, Amsterdam and Istanbul in order to provide a comparative study between the marketing activities of these major classic European city destinations.

Recently, I have written to your organisation to obtain any information about the objectives, aims and marketing activities of your organisation and, have received some booklets, documents and reports. In order to strengthen the base of my research, I am now planning to undertake some interviews with the key personnel of the tourism organisations in the city -i.e. London, Istanbul or Amsterdam- during the period of March-May 1999.

I would appreciate it, if you could allocate some of your time to share your views both on the matters of the tourism industry in the city and, on the marketing activities of your organisation.

I look forward to hearing from you soon and thank you in anticipation.

Yours sincerely,

(Signature)

Gurhan Aktas

Appendix 6. A list of the interviewees

The following personnel and positions in the organisations shown respectively were correct at the time of conducting interviews.

Name	Position	Organisation
London Interviewees		
1- Mr Paul Hopper	Managing Director	London Tourist Board
2- Ms Kate Davidson	Project Manager	TourEast London
3- Mr Hugh Roderick	Head of Communications	Science Museum
4- Mr Robin Broke	Director	ALVA (Association of Leading Visitor Attractions)
5- Mr Nigel Scandrett	Sales & Marketing Director	Thames Luxury Charters
6- Mr Steve Beioley	Director	The Tourism Company
7- Ms Sally Collinson	Marketing Manager	Oxford Street Association
8- Mr Stuart Crouch	Chairman	BITOA (British Incoming Tour Operators Association)
9- Mrs Philipa Besant	Public Relations Manager	APTG (Association of Professional Tourist Guides)
10- Ms Amanda Clancy	Marketing Analyst	Tussaud's London Attractions
11- Ms Emma de Souza	Marketing Manager	The Society of London Theatres
12- Ms Anna Barlow	Communications Manager	London First Centre
13- Mr Chris Waterman	Tourism Policy Officer	Local Government Association
14- Ms Anna Barlow	Communications Manager	London First Centre
15- Ms Christine Bentley	Tourism Officer	London Borough of Camden
16- Ms Patricia Brown	Director	Central London Partnership
17- Ms Gwen Owen	Tourism Officer	London Borough of Southwark
18- Mr Bob Bacon	Office Manager	British Hospitality Association
Amsterdam Interviewees		
1- Ms Karin Brandt	Head of Marketing	NBT Amsterdam Office
2- Mr B.van den Broek	Marketing and Development	VVV Amsterdam Tourist Bureau Manager
3- Ms Marlies de Waal	Tourism Project Officer	City of Amsterdam
4- Ms Mirjam Boers	Project Manager	Amsterdam Promotion Foundation

Name	*Position*	*Organisation*
5- Ms Saskia Bak	Asst. Marketing Manager	Amsterdam Arena
6- Prof. G. Ashworth	Lecturer	Groningen State University
7- Ms G. van Weering	Head of Marketing	RAI Conference Centre
8- Mr Ronald Wiggers	Recreation Planner	City of Amsterdam
9- Ms S.van der Heiden	Office Manager	Amsterdam Culture Bureau
10- Ms Sonja Kruger	Executive Secretary	The Fashionable Heart of Amsterdam
11- Ms Loes Trip	Manager	Amsterdam Congress Bureau
12- Dr Martinus Kosters	Director of Boards	Netherlands Institute of Tourism And Transportation Studies
13- Dr Dick van der Vaart	Director	Amsterdam Study Centre for the Metropolitan Environment
14- Dr Cees Gorter	Lecturer	Amsterdam Free University
15- Mr F. van der Avert	Manager of Public Relations	Rijksmuseum
16- Mr P. van den Noort	Director of Development	Gay Games Amsterdam 1998

Istanbul Interviewees

1- Mr Mustafa Tokatli	Show Manager	CNR International Fair Organisations
2- Dr Ozen Dalli	Director	Istanbul Convention and Visitors Bureau
3- Mr Melih Fereli	Director	Foundation for Culture and Arts in Istanbul
4- Mr Ahmet Sensilay	Chairman	Istanbul Travel Guides Board
5- Mr Sinan Bilsel	General Manager	Istanbul Convention and Exhibition Centre
6- Mr Haydar Duman	Assistant Chairman	Istanbul Travel Guides Board
7- Mr Sinan Erdem	Chairman	The National Olympic Games Committee
8- Ms Belkis Durmus	Tourism Police Officer	Istanbul Tourism Police
9- Dr Celik Gulersoy	Director	The Touring and Automobile Club of Turkey
10- Dr Filiz Cagman	Manager	Topkapi Palace Museum
11- Mr Erol Onder	Assistant Director	Istanbul Tourism Directorate

Name	*Position*	*Organisation*
12- Mr Cetin Gurcun	Secretary General	TURSAB (The Association of Turkish Travel Agencies)
13- Mr Ali Gureli	Director of Boards	TUROB (Touristic Hotels and Investors Association)
14- Mr Faruk Dorende	Chairman	Kapalicarsi Tradesmen Association
15- Prof. Meral Korzay	Head of Tourism Programme	Bogazici University
16- Mr Kutlu Aktas	Governor	Istanbul Governor's Office
17- Mr Necdet Gurgun	Assistant Director	Istanbul Culture Directorate

Appendix 7. A Sample to Interview Questions

A) Introductory Questions about the Organisation

1- What are the aims, goals and targets of (the organisation)?

2- What is the organisational structure of (the organisation)?

3- How would (the interviewee) evaluate the relationship between (the organisation) and the tourism industry?

B) Questions about *'the Marketing Activities of the Organisation'*

1- What are the aims of (the organisation) with regards to marketing both (its) products and services and the case study city as a product package?

2- Who are the customers of (the organisation)? At which market segments do (its) products and services target?

3- How important is the marketing department for (the organisation)?

4- Which marketing tools does (the organisation) use in (its) marketing activities? Which one is considered to be the most effective one? Why?

5- Does (the organisation) prepare short-, medium- and long-term strategic marketing plans?

6- Does (the organisation) hold regular market research activities?

7- Who are the competitors of (the organisation)?

8- How fierce is the competition between the tourist attractions and organisations in the case study city?

9- Does (the organisation) have any financial restrictions on (its) marketing activities?

C) Questions about *'the Case Study City as a Tourist Destination'*

1- How would (the interviewee) describe the tourist offer of the case study city?

2- What are the advantages and disadvantages of the case study city as a tourist destination? What should be done to upgrade, improve or develop the tourist offer?

3- What are the opportunities and threats? How can the opportunities be turned into realities? What can be done to eliminate the threats?

4- How would you assess the attitudes of the locals toward the industry and visitors?

5- At which stage of life cycle does (the interviewee) think that the case study is?

D) Questions about *'Marketing the Case Study City as a Tourist Destination'*

1- What are the main market segments for the tourist offer of the case study city? What are the main market generators? What are the potential market generators and market segments?

2- How would (the interviewee) evaluate the marketing activities of the leading tourist authority and other major city-wide authorities?

3- How important are partnerships for marketing destinations? What is the situation like in the case study city?

4- Should the leading tourist authority be a public body or a private organisation?

5- Is there a need to establish a new organisation to market the case study city? How important is to market (the city) in parts through decentralisation schemes?

6- Which other organisations does (the organisation) work closely with?

7- Which other cities can be considered as the competitors of the case study city?

8- How would (the interviewee) describe the image of the case study city? How important are the image marketing activities of both individual tourism organisations and city-wide authorities?

9- How important is Information Technology (IT) when marketing tourist destinations in general and the case study city in particular?

Appendix 8. The List of Codes used During the Analysis of the In-depth Interviews

LONDON CODES

Accessibility
Accommodation
Advertisement
Amsterdam
Arts, culture and entertainment
Attracting business visitors
Attracting day-trippers
Attracting families
Attracting groups
Attracting individuals
Attracting repeat visitors
Attraction development
Belief of stakeholders in partnerships
Benefits of partnerships
Benefits of private organisations
Benefits of public organisations
Benefits of semi-public NTOs
Benefits of the Millennium Celebrations
Birmingham
Bottlenecks of partnerships
Brochures, guides, leaflets, maps
Brussels
Central tourist zone
Community acceptance of tourism
Competition between attractions
Crowding
Decentralisation of marketing tasks
Direct marketing
Diversity
Domestic marketing
Dublin
Edinburgh
Educating locals
Educating staff
Educating stakeholders
Expensive destination
Effective national organisational tourism structure
Familiarisation trips
Friendliness
Funding generated by partners
Future expectations
Gateway
Glasgow
Government and tourism planning
Government funding for tourism
Growing product
Heritage
Ignored domestic tourism
Image marketing
Improving transport options
Increasing visitors
International competitors
IT marketing
Lack of accommodation
Lack of conference centres
Lack of confidence in NTOs
Lack of long-term marketing plans
Landmarks
Long-term marketing plans
Manchester
Market segmentation
Marketing a product cluster
Marketing as a main task
Marketing logo
Marketing research
Marketing through famous persona
Marketing to businesses
Marketing to locals
Mature product
Mistrust in the Millennium Celebrations
National competitors
Need for funding
Need for more staff
Need for partnerships
Need to increase international events
New York
Overseas marketing
Paris
Positive image
Press releases
Public Relation
Quality of the product package
Rome
Sales promotion
Seasonality
Shopping
Short- and mid-term marketing plans
Special events
The Thames as an underused asset
Tourism as a catalyst
Tourism development as a main task
Tourism Management
Tourist zones
Traffic congestion
Travel Markets
Uniqueness
Visitor generators: Europe
Visitor generators: Far East
Visitor generators: South Africa
Visitor generators: USA
Visitor management
Visitors on education trips
Visitors on weekend-break trips
Word of mouth in marketing

AMSTERDAM CODES

Accessibility
Accommodation
Advertisement
Arts, culture and entertainment
Attracting business visitors
Attracting day-visitors
Attracting families
Attracting first-time visitors
Attracting groups
Attracting individuals
Attracting repeat visitors
Attracting young visitors
Attraction development
Belief of stakeholders in partnerships
Benefits of partnerships
Benefits of private organisations
Benefits of public organisations
Born
Bottlenecks of partnerships
Brochures, guides, leaflets, maps
Brussels
Budapest
Central tourist zone
Cheap destination
Community acceptance of tourism
Compact City
Competition between attractions
Copenhagen
Crowding
Decentralisation of marketing
Decreasing visitor numbers
Direct marketing
Domestic marketing
Dublin
Edinburgh
Educating locals
Educating staff
Effective transportation
Expensive destination
Familiarisation trips
Friendliness
Funding generated by partners
Future expectations
Gateway
Glasgow
Government and tourism planning
Government funding
Heritage
Ignored domestic tourism
Image marketing
Improving infrastructure
Increasing visitor numbers
International competitors
IT marketing
Lack of accommodation
Lack of confidence in NTOs
Lack of long-term marketing plans
Landmarks
London
Long-term marketing plans
Market segmentation
Marketing a product cluster
Marketing as a main task
Marketing logo
Marketing research
Marketing through famous persona
Marketing to businesses
Marketing to locals
National competitors
Need for funding
Need for more staff
Need for partnerships
Negative image
Niece
Overseas marketing
Paris
Prague
Press releases
Public Relation
Quality of the product package
Regional marketing: Randstad
Rome
Rotterdam
Sales promotion
Seasonality
Sex and drugs
Shopping
Short- and mid-term marketing plans
Short duration of visitors' stay
Special events
Stagnant product
The Hague
Tolerance
Tourism as a catalyst
Tourism development as a main task
Tourism Management
Tourist zones
Traffic congestion
Travel Markets
Uniqueness
Unsafe destination
Utrecht
Venice
Vienna
Visitor generators: Europe
Visitor generators: Far East
Visitor generators: USA
Word-of-mouth marketing

ISTANBUL CODES

Accessibility
Accommodation
Advertisement
Antalya
Arts, culture and entertainment
Athens
Attracting business visitors
Attracting groups
Attracting individuals
Attraction development
Barcelona
Belief of stakeholders in partnerships
Benefits of partnerships
Benefits of private organisations
Benefits of public organisations
Benefits of semi-public organisations
Bottlenecks of partnerships
Brochures, guides, leaflets, maps
Budapest
Central tourist zone
Cheap destination
Community acceptance of tourism
Competition between attractions
Crowding
Direct marketing
Domestic marketing
Dusseldorf
Educating locals
Educating staff
Educating stakeholders
Educating visitors
Expensive destination
Familiarisation trips
Florence
Friendliness
Funding generated by partners
Future expectations
Gateway
Government and tourism planning
Government funding for tourism
Growing product
Heritage
Ignorance of the total marketing offer
Ignored domestic tourism
Image marketing
International competitors
IT marketing
Lack of accommodation
Lack of confidence in NTOs
Lack of cooperation among stakeholders
Lack of marketing plans
Lack of sufficient urban infrastructure
Landmarks
Lisbon
London
Long-term marketing plans
Madrid
Market segmentation
Marketing a product cluster
Marketing as a main task
Marketing logo
Marketing research
Marketing through famous persona
Marketing to businesses
Marketing to locals
Mistrust of Olympic Games
National competitors
Need for funding
Need for more staff
Need for partnerships
Negative image
New York
Olympic Games' benefits
Overcharge of tourist products
Overseas marketing
Paris
Prague
Press releases
Public Relations
Quality of the product package
Regional marketing
Rome
Seasonality
Shopping
Short-term marketing plans
Special events
Tourism as a catalyst
Tourism development as a main task
Tourism Management
Tourist zones
Traffic congestion
Travel Markets
Turkish cuisine
Uniqueness
Unsafe destination
Venice
Visitor generators: Commonwealth Ind. States
Visitor generators: Eastern Europe
Visitor generators: Europe
Visitor generators: Far East
Visitor generators: Middle East
Visitor generators: USA
Visitor management
Warm climate
Word of mouth in marketing

Appendix 9. Re-estimation of Domestic Visitor Numbers to London, Between 1975-88

Since 1989, the UKTS (The United Kingdom Tourism Survey) has been collecting statistical data on domestic visitors to London systematically. Before 1989, BTSM (British Tourism Survey Monthly) had provided statistics, which were mainly based on rounded estimations of trips taken by Britons, and not on the sample size of survey respondents. The UKTS, on the other hand, has brought a uniform design to ensure compatibility of information collected through in-home surveys, and conducted on randomly selected sample sizes with minimised sampling errors and bias.

As a result of this change in survey methods and providers, the life cycle analysis of London does not provide a meaningful outcome when domestic visitor statistics are transformed onto graphics. Therefore, in order to mitigate uncertainty caused by the incomparable sets of data for the periods pre- and post-1989, the numbers of domestic visitors to London between 1975-88 are re-estimated based on some assumptions raised according to tourism trends supported by the BTSM and UKTS statistics. These assumptions are that;

- the steady rise in the standard of living and affluence in the post war period stabilised domestic trips in the UK;
- between 1975 and 1988, domestic tourism to London continued to grow on a balanced level with no conspicuous fluctuations;
- in 1989, there was a decrease in domestic visitors to London in comparison to the year 1988, due to the commencement of economic crisis in the UK;
- the findings of the UKTS on domestic tourism in England denote that large cities had a stabilised share of 34% of all domestic visitors during the period 1989-97. It is assumed that this share had been the same for the period 1975-88;
- London's share of the domestic visitors attracted to large cities in England is averaged at 28% during the period 1989-1997. It is assumed that this share had been the same for the period 1975-88.

Based on these assumptions, the following table is prepared and the figures on the column 3 are used as the total domestic visitor numbers to London for the concerned years in the applications of life cycle analysis of the city's tourist product, while the figure provided by the BTSM (column 4) are ignored.

Table A9.1. Domestic Visitors to London Between 1975-88*

Year	(1) Domestic Visitors in England	(2) Large Cities' Share 34% -2-	(3) London's Share 28%	(4) BTSM's Figures
1975	96	32.6	9.1	10
1976	101	34.3	9.6	11
1977	98	33.3	9.3	11
1978	95	32.3	9	12
1979	97	33	9.2	12
1980	106	36	10.1	13
1981	104	35.4	9.9	13
1982	101	34.3	9.6	13
1983	110	37.4	10.5	15
1984	113	38.4	10.7	14
1985	105	35.7	10	14
1986	106	36	10.1	13
1987	110	37.4	10.5	15
1988	110	37.4	10.5	12

* All in millions

Source: UKTS and BTSM statistics.

Appendix 10. Real Price Index in the UK, between 1963-2000 (In Sterling -£-)

Year	1963=100	1996=100	Year	1963=100	1996=100
1963	100	9.8	1982	554.6	54.4
1964	103.3	10.1	1983	580.1	56.9
1965	108.2	10.6	1984	607.8	59.6
1966	112.5	11	1985	646	63.3
1967	115.3	11.3	1986	667.9	65.5
1968	120.6	11.8	1987	680.6	66.7
1969	127.2	12.5	1988	713.9	70
1970	135.3	13.3	1989	769.4	75.4
1971	148.1	14.5	1990	842.2	82.6
1972	158.6	15.6	1991	891.6	87.4
1973	173.1	16.9	1992	925	90.7
1974	201	19.7	1993	939.7	92.1
1975	233.2	22.9	1994	962.4	94.4
1976	271.9	26.7	1995	995.8	97.6
1977	315	30.9	1996	1019.8	100
1978	341.2	33.5	1997	1051.4	103.1
1979	386.9	37.9	1998	1088.1	106.7
1980	456.5	44.8	1999	1104.4	108.3
1982	510.6	50.1	2000	1137.4	111.5

Source: Central Statistical Office, various years.

Appendix 11. The Evolution of London's Tourism Industry with Some Important Dates

The Stage	Year	
Exploration (-1962)	1759	British Museum opened.
	1851	The Great Exhibition held in Hyde Park.
	1905-8	Ritz Hotel (1906), Harrods (1905) and Selfridges (1908) opened.
	1951	Festival of Britain attracted 8.5 million visitors to London
Involvement (1963-75)	1963	LTB was founded.
	1963	London Hilton opened to attract more Americans and signalled the mass tourism from North America.
	1964	London Convention Bureau was established and published the first edition of 'London: Capital for Conferences and Conventions'.
	1966	World Cup was held in London
	1969	Development of Tourism Act. ETB took over the responsibilities of BTA and provided grants to regional boards.
	1970s	Youth tourism arose with the arrival of back-packers seeking cheap accommodation.
	1973	Government provided grants to new hotels and extensions for 1000 pounds a room. Thirty thousand new rooms were opened in London, which caused a price war between organisations.
	1974-75	The energy crisis hit the industry as prices increased dramatically.
Development (1975-95)	1977	Queen's Jubilee boosted tourist arrivals.
	1980	Oil price increase affected the industry all around the world.
	1981	Initiatives were taken to regenerate neglected London Docks followed by the establishment of the London Docklands Development Corp.
	1986	Terminal 4 was opened at Heathrow Airport.
	1987	London City Airport was opened.
	1990-91	Gulf Crisis affected North American trips to Europe.
	1992	Abolition of frontiers within the European Community.

	1993	Opening of Channel Tunnel eased transportation between the continent and London with the arrival of trains at central stations at both ends.
Consolidation (1995-2000)	1995	The prevailing trend to establish partnerships between private and public tourism organisations to regenerate and market different regions and districts of London.
	1996	Government confirmed the budget allocation for the Millennium Celebrations and the Millennium Dome to be based in Greenwich.
	1997	Crisis in Asia diminished the tourism flow to London from countries like Taiwan, Malaysia, Indonesia, Korea, Japan, etc.
	2000	Millennium Celebrations took place in Greenwich. New attraction developments such as London Eye along the River Thames, the Millennium Dome in Greenwich and the Tate Modern Art Museum on the South Bank were opened.

Source: Based on Meiklejohn (1908), Gray (1978), Hibbert (1969), Jenner (1988), Borer (1977) and Evans (1996).

Appendix 12. Estimation of Overseas Visitors and their Expenditure in Istanbul, Between 1963-89

The official yearly statistical information on overseas visitors to Istanbul is only available from 1973, while the annual overseas tourism income of the city does not go back any earlier than 1990. In fact, the life cycle graphics assessed in Chapter 7 illustrate the recent growth of the tourism industry, which was mainly accelerated by Government initiatives provided in the mid-1980s. However, a life cycle analysis of the tourism industry in Istanbul with such limited statistical information would have resulted in an underestimated pattern of growth in recent years, as the brevity of period covered would only enlighten the evolution of tourism development during the last two decades.

Considering that Istanbul and the other case study cities have been attracting visitors long before the 20th century, it can even be argued that life cycle analyses, which look into the tourism development in these cities during the last 40 years, embody only some stages of their evolution as tourist destinations. Therefore, in this investigation, there seemed to be a need to expand the period, for which the statistical information was available, before the life cycle analysis was applied to the tourism industry of Istanbul. This, as a result, would make the life cycle of the city more compatible with the analyses of other two cities and also, would help to draw meaningful conclusions from the investigation.

To this end, relying both on the existing literature, which is consisted of articles, projects and reports on the history of tourism in Turkey in general and in Istanbul in particular (Seeking 1989, O'Reilly, 1993, Baki, 1990 and Uysal and Crompton, 1984), and also on general statistical data on a national scale, some assumptions were raised and were used as determining factors when estimating the annual figures of overseas visitors and their expenditure in the city between 1963-89. These assumptions are that;

- despite its importance as a trade, culture and education centre, the history of Istanbul as a tourist destination, is quite recent regarding its capacity and potential to attract large numbers of visitors.
- there has been an indisputable growth in visitor arrivals to the city, after the country entered into its liberalisation era in the 1980s, during which Government incentives and initiatives were provided to the hospitality industry, and the efforts to improve urban infrastructure was given an impetus.
- while tourism arrivals to the city fluctuated greatly due to the influences of various external factors like national economic crises followed by military coups, political and social conflicts, terrorist attacks, world-wide economic crises, and the problems between Greece and Turkey

over Cyprus, overseas visitors to the city stayed on an average of 500,000 visitors a year between 1972-83, hence indicating no prospect for sharp growth at the time.

- Istanbul is and has been a gateway destination to Turkey. In 1973, Turkey attracted about 1.35 million overseas visitors of whom 42% visited Istanbul. Such a distinctive share of the city has decreased gradually with the emergence of holiday resorts along the South and West Coast of the country after the 1980s. However, the statistical information provided by the State Statistics Office shows that among all overseas visitors to Turkey, an average of 34% visited Istanbul between 1973-81. More recently, Istanbul's share was averaged at 26% between 1993-99. In the light of this information, it is assumed that Istanbul had a stabilised share of 42% of all overseas visitors to the country during the period 1963-72.
- similarly, it is also assumed that the share of the city in the national tourism income has been gradually decreasing since the start year of the analysis 1963. This is mainly because that the relation between visitor numbers and their expenditures in the city are linked to each other on a basis of linear correlation, in such a way that any decrease or increase in visitor numbers would be reflected in the same direction on visitor expenditures. Therefore, while the share of Istanbul from the national tourism income is considered to be as high as 40% between the years 1963-73, it is assumed to have decreased to 33% and 30% during the periods 1974-81 and 1982-89 respectively.

The estimate figures, which are calculated according to the above assumptions, are shown in Table A12.1.

Table A12.1. Estimate Figures of Overseas Visitors and Expenditure in Istanbul between 1963-89

YEAR	Overseas Visitors to Turkey	Overseas Visitors to Istanbul*	Share of Istanbul	Overseas Visitors Expenditure in Turkey ('000$)	Overseas Visitors Expenditure in Istanbul** ('000$)	Share of Istanbul
1963	198.841	83,513	42%	7.6	3.0	40%
1964	229,347	96,326	42%	8.3	3.3	40%
1965	361,758	151,938	42%	13.7	5.5	40%
1966	440,534	185,024	42%	12.1	4.8	40%
1967	574,055	241,103	42%	13.2	5.3	40%
1968	602,996	253,258	42%	24.1	9.6	40%
1969	694,229	291,576	42%	36.5	14.6	40%
1970	724,784	304,409	42%	51.6	20.6	40%
1971	926,019	388,928	42%	62.8	25.1	40%
1972	1,034,955	434,681	42%	103.7	41.5	40%
1973				171.5	68.6	40%
1974				193.7	63.9	33%
1975				200.8	66.3	33%
1976				180.5	59.6	33%
1977				204.9	67.6	33%
1978				230.4	76.0	33%
1979				280.7	92.6	33%
1980				326.6	107.8	33%
1981				381.3	125.8	33%
1982				370.3	111.1	30%
1983				411.1	123.3	30%
1984				840.0	252.0	30%
1985				1,482.0	444.6	30%
1986				1,215.0	364.5	30%
1987				1,721.1	516.3	30%
1988				2,355.3	706.6	30%
1989				2,556.5	767.0	30%

*Post-1972 data on overseas visitors to Istanbul is available from the Statistical Yearbooks of DIE.

Source: Based on statistical information provided by DIE on a national scale.

Appendix 13. Annual Events in Amsterdam

Month	*Event*
January	• Annual Horecava Hotel and Catering Trade Fair
February	• Chinese New Year Celebrations
March	• Annual HISWA Boat Show
April	• Queen's Day: City-wide street party (30 April) • National Museum Weekend
May	• Liberation Day (5 May) • National Windmill Day (11 May) • Vondelpark Summer Concerts
June	• Holland Festival • Amsterdam Roots Festival • Robeco Summer Concerts
July	• Dance Festival • Over the IJ Festival
August	• Annual Prinsengracht Open-Air Concert • The Canal Festival • Triple X Festival • Sail Amsterdam Events • Uitmarkt Culture and Arts Festival
September	• Bloemencorso: A flower parade • National Open Monuments Day • Dam to Dam Run • Jordan Festival
October	• Pan Antique Fair • Motorai Motorcycle Show • Delta Lloyd Amsterdam Marathon
November	• St. Nicholas Parade • International Horticulture Trade Fair • Bock Beer Festival
December	• Christmas Celebrations and Markets • Christmas Decorations and Illuminations

Source: Amsterdam Congres Bureau (1998) and VVV (1999a).

Appendix 14. Real Price Index between 1963-2000 (In US Dollars -$-)

Year	1983=100	Year	1996=100
1963	30.7	1982	97.5
1964	31.1	1983	100
1965	31.6	1984	104.1
1966	32.5	1985	107.8
1967	33.4	1986	109.5
1968	34.9	1987	113.8
1969	36.8	1988	118.5
1970	39.0	1989	124.4
1971	40.7	1990	130.4
1972	41.9	1991	136.2
1973	44.3	1992	140.5
1974	49.4	1993	144.4
1975	54.2	1994	148.4
1976	57.1	1995	152.5
1977	61.0	1996	157.0
1978	65.7	1997	160.5
1979	73.1	1998	163.2
1980	82.7	1999	166.7
1981	91.6	2000	172.8

Source: US Department of Labour (2001).

Appendix 15. Estimated Need for Hotel Rooms and Bedspace in London

$$\text{ROOMS} = \frac{\text{(Total Visitor Numbers) X (Average Length of Stay) X (Fraction of Visitors Using Hotels)}}{\text{365 X (Room Occupancy) X (Average No of Person per Room)}}$$

Room Occupancy Rate:	79.9% in 1999	80.3% in 2000
Highest Monthly Room Occupancy Rate:		88.2% in June 2000
Bedspace Occupancy Rate:	56.5% in 1999	60.5% in 2000
Highest Monthly Bedspace Occupancy Rate:		69.5% in June 2000
Length of Stay:	2.3 nights in 1999	2.4 nights in 2000
Total Visitors:	28.0 million in 1999	27.4 million in 2001
Overseas Visitors:	13.2 million in 1999	12.0 million in 2001 (est.)
Domestic Visitors:	14.8 million in 1999	15.4 million in 2001 (est.)
Fraction Using Hotels:	47%	13.09 million visitors
Overseas Visitors:	70% in 1999	9.24 million visitors
Domestic Visitors	26% in 1999	3.85 million visitors
Average Number of Visitors per Room:		1.42

The Need for Hotel Rooms in 2001 =>

$$= \frac{(27{,}400{,}000) \times (2.4) \times (0.47)}{(365) \times (0.88) \times (1.42)} = \mathbf{67{,}763\ rooms}$$

The Need for Bedspace in 2001 =>

$$= \frac{(27{,}400{,}000) \times (2.4) \times (0.47)}{(365) \times (0.695)} = \mathbf{121{,}838\ bedspaces}$$

The difference between the known stock and the need for bedspace in London is:
= (189,016) - (121,838) = **67,178 bedspaces**

Source: WTO (1993), LTBCB (2000a, 2000b, 2001a) and BDO (1999).

Appendix 16. Estimated Need for Hotel Rooms and Bedspace in Istanbul

$$\text{ROOMS} = \frac{\text{(Total Visitor Numbers) X (Average Length of Stay) X (Fraction of Visitors Using Hotels)}}{\text{365 X (Room Occupancy) X (Average No of Person per Room)}}$$

Room Occupancy Rate: 32% in 1999

Bedspace Occupancy Rate: 29% in 1999

Length of Stay:

International Visitors:	2.2 nights in 1999
Domestic Visitors:	1.8 nights
Total Visitors:	2.0 nights

Total Visitors: 8,603,607 in 1999

International Visitors:	1,737,554
Domestic Visitors (est.*):	6,866,053

Fraction Using Hotels :

International Visitors:	85%
Domestic Visitors:	28%
Total Visitors:	39.5%

Average Number of Visitors per Room: 1.53

The Need for Hotel Rooms for International Visitors =>

$$= \frac{(8{,}603{,}607) \times (2.0) \times (0.395)}{(365) \times (0.32) \times (1.53)} = \textbf{38,034 rooms}$$

The Need for Bedspace =>

$$= \frac{(8{,}603{,}607) \times (2.0) \times (0.395)}{(365) \times (0.29)} = \textbf{64,212 bedspaces}$$

The difference between the total known stock and the need for bedspace in Istanbul =>

= (79,675) - (64,212) = **15,463 bedspaces**

* The number of domestic visitors is estimated according to the TBYGM statistics on domestic visitors who stayed in accommodation establishments in 1999 and the fraction of domestic visitors staying in such establishments.

Source: TBYGM (2000a), TBYGM (2000c), ITD (2000) and Oktay (1997).

Appendix 17. Estimated Need for Hotel Rooms and Bedspace in Amsterdam

$$\text{ROOMS} = \frac{\text{(Total Visitor Numbers) X (Average Length of Stay) X (Fraction of Visitors Using Hotels)}}{\text{365 X (Room Occupancy) X (Average No of Person per Room)}}$$

***Room Occupancy Rate*:**	78% in 1999
***Bedspace Occupancy Rate*:**	62% in 1999
***Length of Stay*:**	
International Visitors:	2.2 nights in 1999
Domestic Visitors:	1.8 nights
Total Visitors:	2.1 nights
Total Visitors:	3,002,000 visitors in 2000
International Visitors:	2,121,000
Domestic Visitors:	881,000
Fraction Using Hotels :	67% in 2000
International Visitors:	77%
Domestic Visitors:	46%
Total Visitors:	

Average Number of Visitors per Room: 1.44 visitors

The Need for Hotel Rooms for International Visitors =>

$$= \frac{(3{,}002{,}000) \times (2.1) \times (0.67)}{(365) \times (0.78) \times (1.44)} = \textbf{10,302 rooms}$$

The Need for Bedspace =>

$$= \frac{(3{,}002{,}000) \times (2.1) \times (0.67)}{(365) \times (0.62)} = \textbf{18,664 bedspaces}$$

The difference between the total known stock and the need for bedspace in Amsterdam=>
= (34,139) - (18,664) = **15,475 bedspaces**

Source: VVV (1999b, 2000a and 2001a).

Appendix 18. The Most Visited Attractions and Sites in Amsterdam

	Numbers of Visitors	
	1999	1998
1. Canal Boat Tours	3,200,000	2,800,000
2. Amsterdam Arena (AJAX Museum)	1,600,000	900,000*
3. Rijksmuseum	1,309,927	1,226,138
4. Artis Zoo	1,270,324	1,191,532
5. Diamond Centres	1,219,104	959,654
6. Holland Casino	950,047	914,000
7. Anne Frank's House	810,334	821,516
8. Het Concertgebouw***	789,780	783,420
9. Van Gogh Museum	770,384	758,163
10. Madame Tussaud's Scenerama	548,459	644, 658
11. Sexmuseum	530,000*	529,123
12. Royal Theatre Carré***	441,095	438,000*
13. Stedelijk Museum of Modern Art	395,438	464,225
14. New Metropolis Technology Centre	350,000*	352,996
15. The New Church	304,148	412,670
16. Maritime Museum	203,479	228,783
17. Holland Experience	174,631	155,269
18. Tropenmuseum	148,070	191,336
19. Jewish Historical Museum	127,647	117,228
20. Royal Palace	128,827	188,211
21. Amsterdam History Museum	117,850	210,759
22. Stadsschouwburg***	114,008	135,380
23. Rembrandt's House Museum	113,402	141,857
24. Avidome Aviation Museum	90,652	110,166
25. Heineken Brewery	89,925	100,420
26. Bosmuseum (Forest Museum)	84,230	99,390
27. IJ Brewery	82,000*	62,000*
28. Beurs van Berlage***	80,608	160,000*
29. Het Glazen House**	80,000*	80,000*
30. Hortus Botanicus Amsterdam	76,202	69,991
31. Boom Chicago***	69,174	73,359
32. The Old Church	60,881	67,507
33. Museum Amstelkring**	56,138	57,784
34. National Film Museum	54,236	43,688
35. Museum Willet-Holthuysen**	52,539	46,923
36. Allard Pierson Museum	38,238	38,581
37. Hortus Botanicus VU	37,325	35,250
38. Theatre Museum	30,149	30,004
39. The Amsterdam City Archives	25,718	26,325
40. Bible Museum	15,221	20,100

* Estimated figures.
** Furnished canal house museums.
*** Theatres, concert and exhibition centres.

Source: VVV (2000b).

Appendix 19. Tourist Attractions and Sites of Istanbul

1. Topkapi Palace Museum
2. Hagia Sophia Church
3. Hipodrome (Obelisk of Theodosius, Serpentine Column & Column of Constantine)
4. Dolmabahce Palace
5. Grand Bazaar
6. Sultanahmet (Blue) Mosque
7. Beylerbeyi Palace
8. Yildiz Palace
9. Egyptian (Spice) Bazaar
10. Suleymaniye Mosque
11. St Irene Church & The Turkish Imperial Museum
12. Kariye Museum
13. Yerebatan (Basilica) Cistern
14. Galata Tower
15. Kiz Kulesi (Maiden's Tower)
16. Archaeological Museum
17. Aviation Museum
18. Naval Museum
19. Military Museum
20. Ataturk Museum
21. Sadberk Hanim Museum
22. The Museum of Turkish Ceramics (Çinili Kosk)
23. Museum of Fine Arts
24. Museum of Turkish Carpets
25. Mosaic Museum
26. Turkish and Islamic Arts Museum
27. City Museum
28. Ataturk Culture Centre
29. Cemal Resit Rey Hall
30. Lutfi Kirdar Congress and Exhibition Centre
31. CNR International Fair and Exhibition Centre
32. Aynalikavak Summer Pavilion
33. Goksu Summer Pavilion
34. Ihlamur Pavilion
35. Eyup Sultan Mosque
36. Yeni Mosque
37. Ortakoy Mosque
38. Rumeli Hisari (European Fortress)
39. Anadolu Hisari (Asian Fortress)
40. Tatilya Amusement Park
41. Cicek Pasaji (Entertainment and Restaurants)
42. Kumkapi (Entertainment and Restaurants)
43. Atakoy Galleria Shopping Centre
44. Akmerkez Shopping Centre
45. Capitol Shopping Centre

Appendix 20. Visitor Attractions in London

A) Most Visited Attractions in London (all in million visitors)

	1999	2000
1) Millennium Dome	n/a	6.5
2) The British Museum*	5.5	5.5
3) National Gallery*	5.0	4.9
4) Tate Modern Art Gallery**	n/a	3.9
5) British Airways London Eye**	n/a	3.3
6) Madame Tussaud's Wax Museum	2.6	2.4
7) Tower of London	2.4	2.3
8) Natural History Museum	1.7	2.3
9) Chessington World of Adventures*	1.6	1.5
10) Victoria and Albert Museum	0.9	1.5
11) Science Museum	1.5	1.3
12) Westminster Abbey*	1.3	1.3
13) Tate Britain*	1.9	1.2
14) National Portrait Gallery	1.0	1.2
15) St Paul's Cathedral**	1.1	1.2
16) London Zoo	1.1	1.2
17) Kew Royal Botanic Gardens	0.9	0.9
18) National Maritime Museum	0.6	0.9
19) London Aquarium*	0.7	0.8
20) Royal Academy of Arts*	1.4	0.8

* Estimate

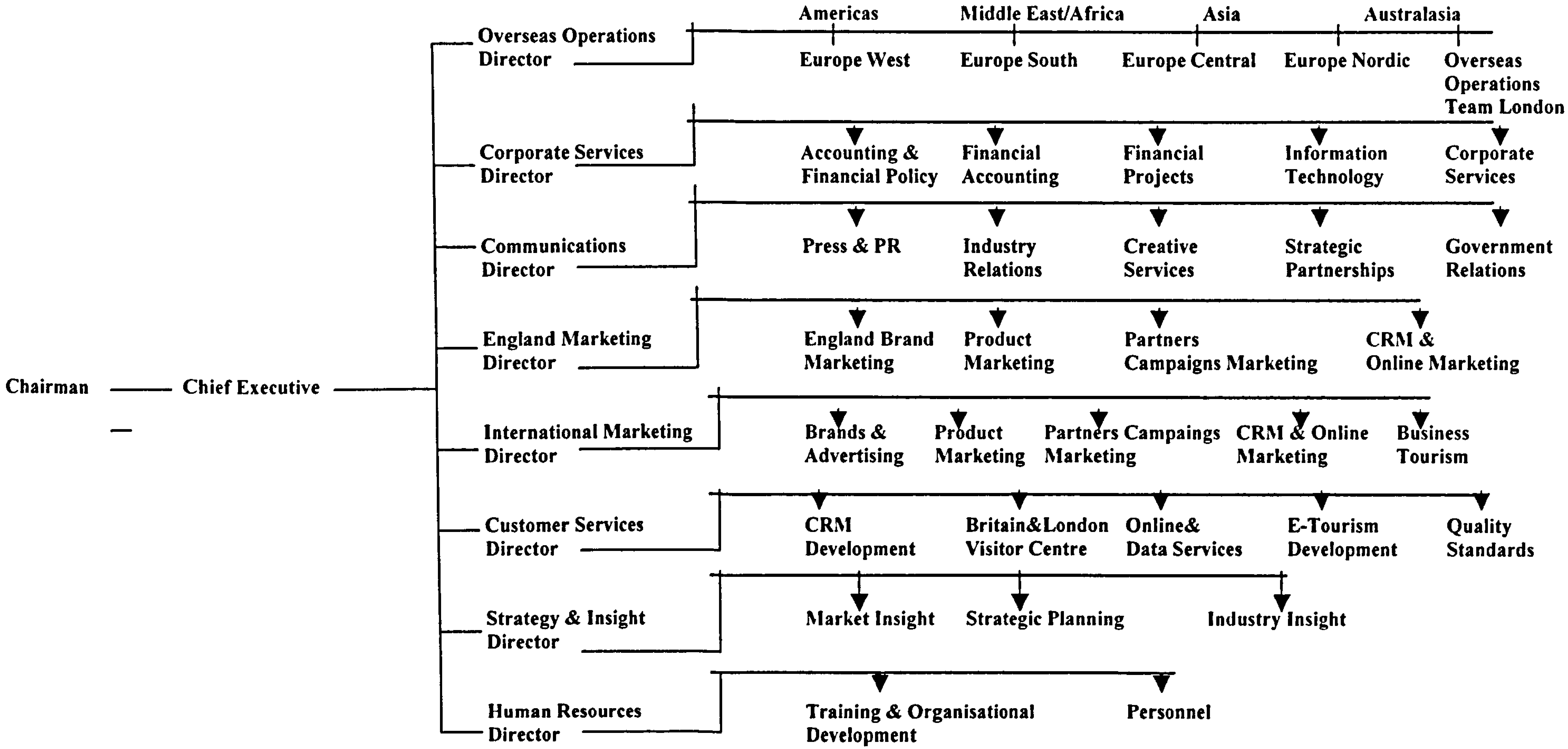
** Only open part of the year

Source: LTBCB (2000b).

B) Other Major Tourist Attractions and Sites in London

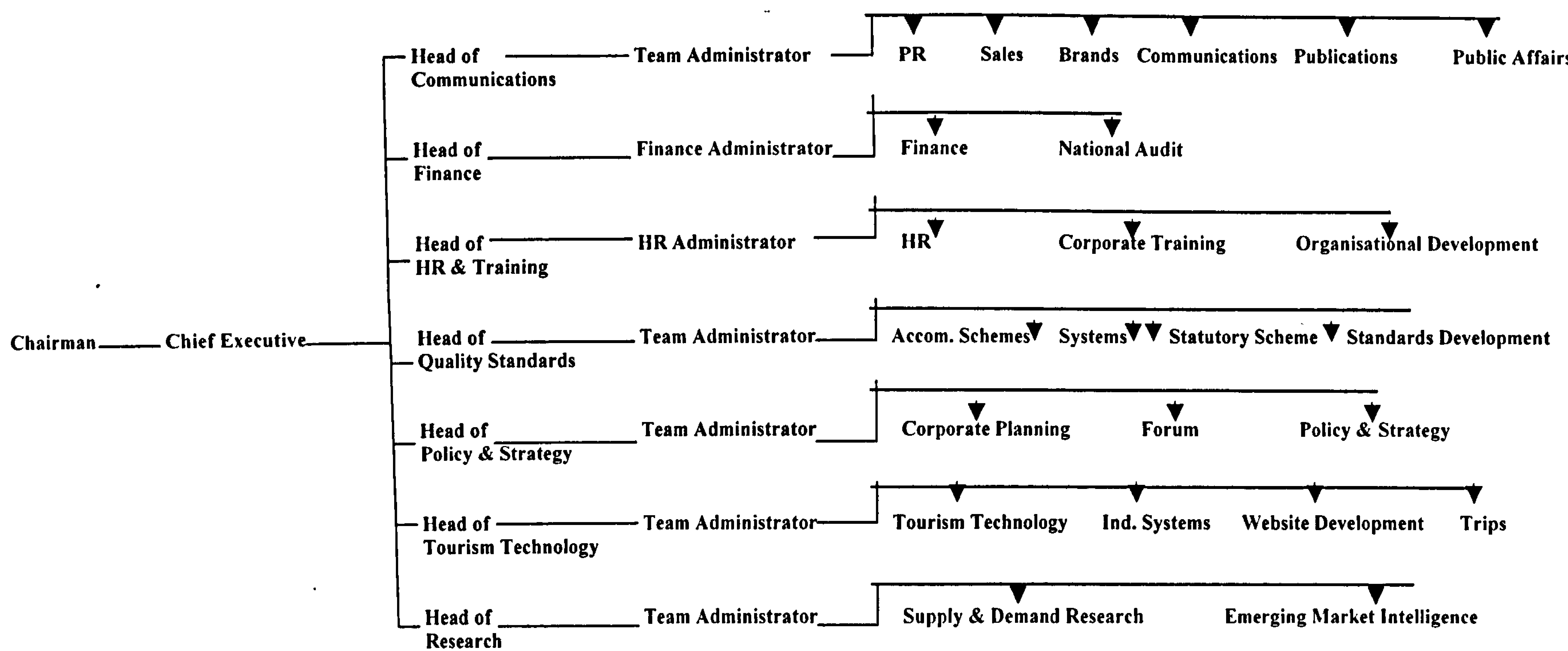
1- Buckingham Palace
2- Kensington Palace
3- Big Ben & House of Parliament
4- Trafalgar Square & Nelson's Column
5- The Tower Bridge
6- Covent Garden Market
7- Camden Town Market
8- Portobello Road Market
9- Harrods
10- Earl's Court Exhibition Centre
11- Royal Albert Hall
12- Alexandra Palace
13- Olympia Exhibition Centre
14- ExCel Exhibition Centre
15- Barbican Art Gallery
16- Design Museum
17- Theatre Museum
18- Imperial War Museum
19- Shakespeare's Globe Theatre
20- London Transport Museum
21- Museum of London
22- British Library
23- Cabinet War Rooms
24- Old Royal Observatory
25- HMS Belfast
26- Cutty Sark
27- London Dungeon
28- London IMAX Cinema
29- London Planetarium
30- Trocadero & Segaworld

Appendix 21. The Organisational Chart of VisitBritain



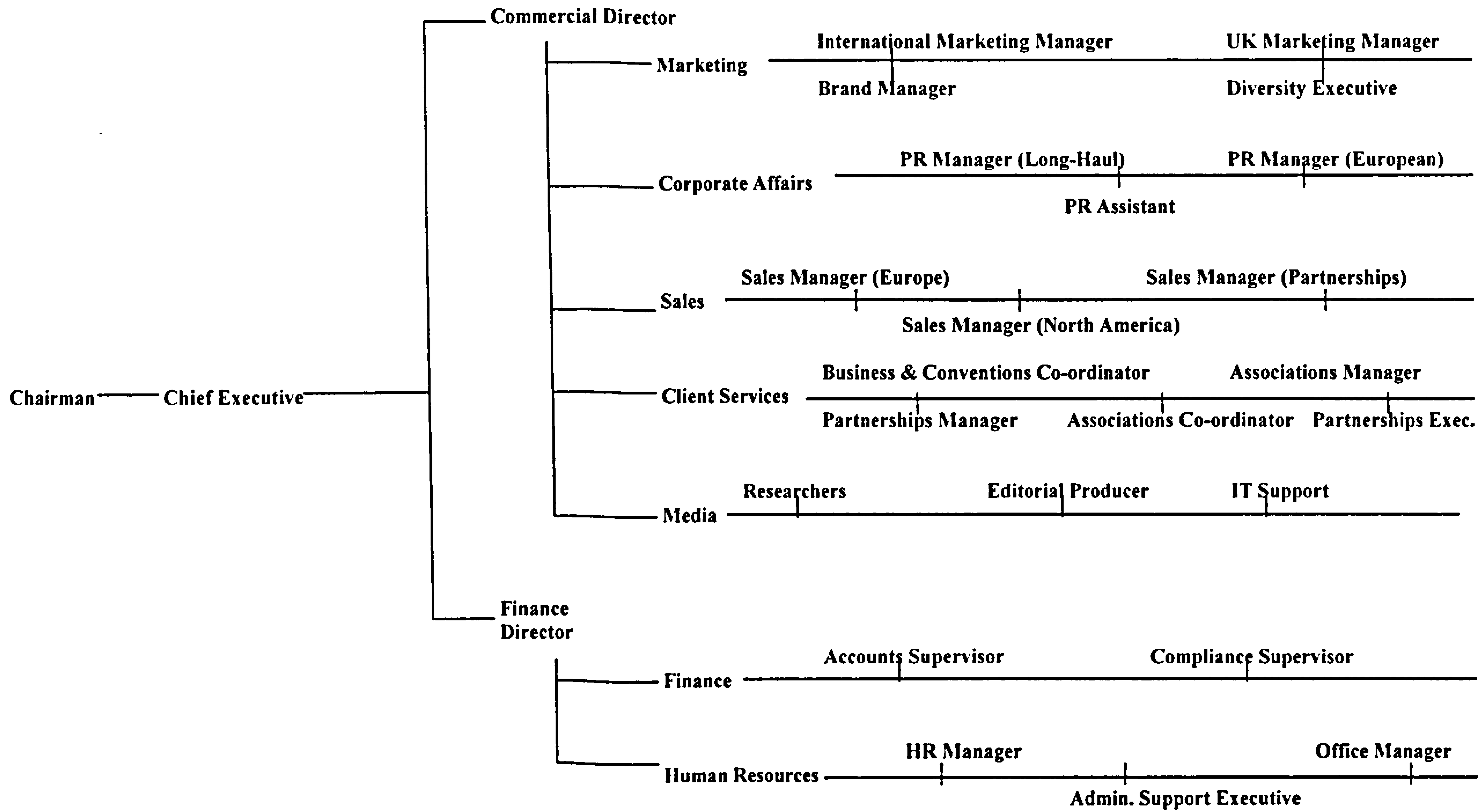
Source: BTA, 2003.

Appendix 22. The Organisational Chart of The English Tourism Council



Source: ETC, 2002.

Appendix 23. The Organisational Chart of Visit London Ltd



Source: Based on VLL (2003a and 2003b) and the official website of Visit London Ltd -i.e. www.visitlondon.com-.

Appendix 24. Action Planning Process of "Visit London: The Mayor's Plan for Tourism in London"

1- The Mayor's Vision for London

To develop London as an exemplary sustainable world city based on interwoven themes: strong and diverse, long-term economic growth; social inclusion to give all Londoners the opportunity to share in London's future success; fundamental improvements in London's environment and use of resources.

- A Prosperous City: Making London a more prosperous city with strong and diverse economic growth.
- A City for People: Making London a better city for people to live in.
- An Accessible City: Improving London's transport and making it accessible to disabled users, women, children and the elderly; making the most sustainable and efficient use of the space in London; encouraging intensification and growth in areas of need and opportunity.
- A Fair City: Promoting social inclusion and tackling deprivation and discrimination.
- A Green City: Making London a more attractive, well designed and green city.

2- The Mayor's Four Principles for Tourism

- Growth: Supporting London's growth as a world leading tourism destination.
- Dispersal: A Greater provision of tourism destinations across London.
- Resources: Improving skills, training, learning opportunities and business competitiveness, in particular of small and medium sized enterprises.
- Diversity and Inclusion: Providing opportunities for SME businesses particularly minority ethnic business development, routes to employment and regeneration within disadvantaged communities.

3- Visit London: The Mayor's Plan for Tourism in London 2003/04-2005/06

Aligned to the Mayor's statutory strategies, and outlines the framework for delivering tourism support over the 3-year plan period under the following themes:

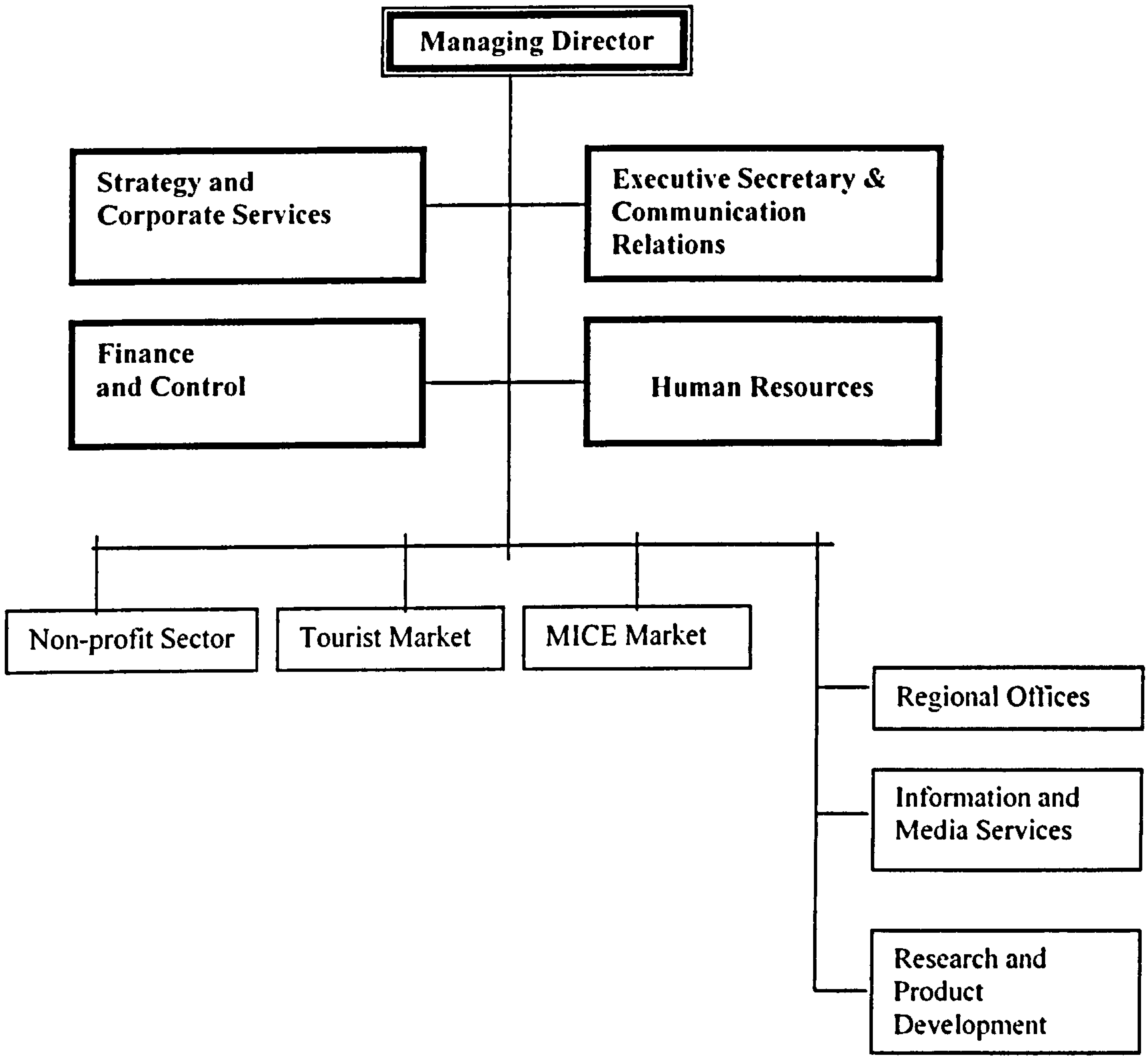
- Leadership and Promotion: Building public and private partnerships to maximize investment, ensuring consistent messages go to the market and to lead the promotion of London as a world class destination.
- Market Development: Continuing the development of London's overseas and domestic promotion both in geographic and sectoral diversification.
- Evidence and Intelligence: Improving the research capability within the tourism sector, both to understand its contribution and monitor/forecast changes.
- Product Development: Improving London's offer by increasing the number of conventions, improving the quality of accommodation, visitor services and public realm, and supporting the development of a wider geographic tourism offer.

4- 3-Year Action Plan 2003/04-2005/06: Detailed Action Plan

- Activities, lead agencies, partners involved, phasing of work and key deliverables.
- A new delivery structure for tourism in London.
- Process by which progress and performance can be assessed.

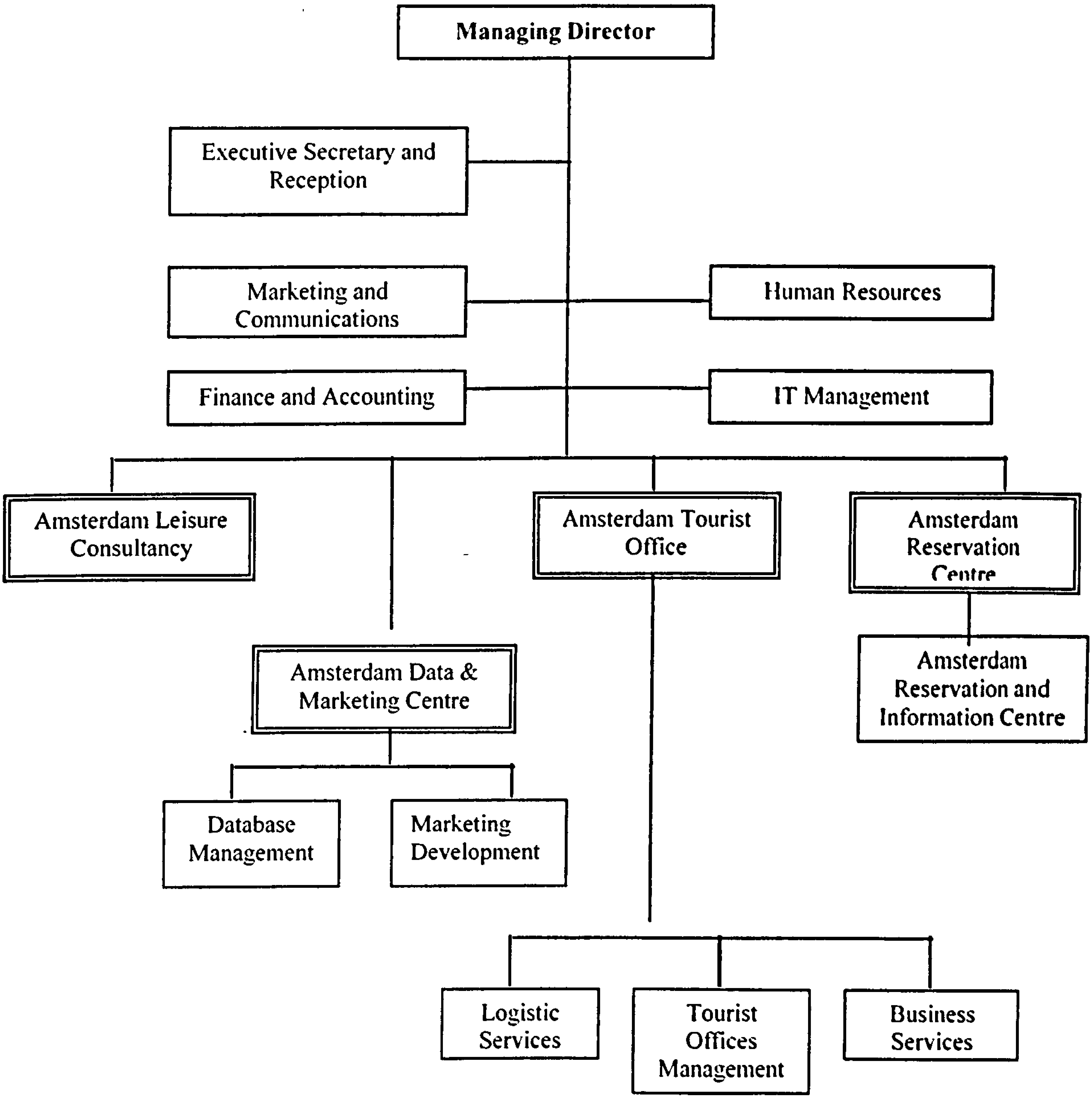
Source: LDA (2003), p.11.

Appendix 25. The Organisational Chart of the Netherlands Board of Tourism and Conventions (NBTC)



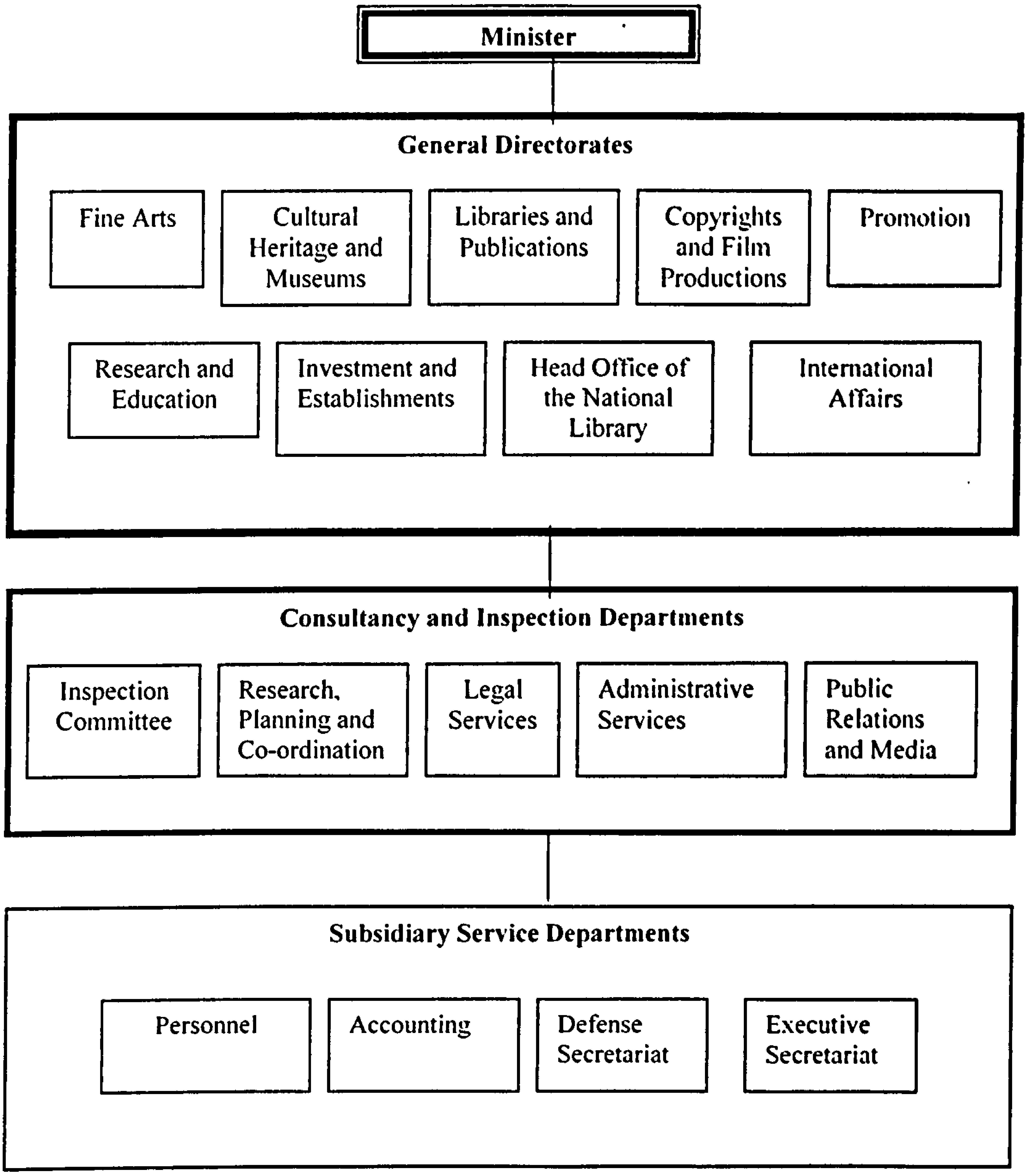
Source: www.holland.com/corporate (accessed on 29 April 2004).

Appendix 26. The Organisational Chart of the Amsterdam Tourist Board



Source: VVV (2000 and 2002).

Appendix 27. The Organisational Chart of the Turkish Ministry of Culture and Tourism



Source: TCKTB (2003).

Appendix 28. London Logos

TOTALLY LONDON©

www.visitlondon.com

LONDON

MEETING ON PROGRESS

LONDON 2012

CANDIDATE CITY

visit LONDON

KIDS LOVE LONDON

Appendix 29. Amsterdam Logos

AMSTERDAM
TOERISME & CONGRES BUREAU

I amsterdam®

Amsterdam
Stad aan het water

Appendix 30. Istanbul and Turkey Logos

Türkiye Turkey

İSTANBUL 2012
"Harmony of Civilizations"

İSTANBUL
CONVENTION
& VISITORS BUREAU

İSTANBUL
KÜLTÜR
SANAT
VAKFI

Greater Municipality
of Istanbul

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