TEMPORAL AND SPATIAL ASPECTS OF TOURISM IN TURKEY

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Abstract

Tourism supply and demand varies from one region to another and from one season to another in many destination countries. These variations provide certain benefits as well as problems and disadvantages. The developing countries need balanced development more than others as they need scarce resources of tourism, such as the natural environment, today as well as in the future, to be able to sustain the economy and the nation. The first chapter explains the need for this study, its aims and objectives together with detailed information about general outlook of Turkey and tourism development.

As a developing country, despite its short history of mass tourism movements, Turkey has experienced massive growth in tourism and the effects of variations in time and place since the 1980s. Spatial and temporal variations in Turkish tourism have increased and tourism movements are concentrated increasingly in the coastal regions of the Mediterranean and Aegean and in the peak season between May and October since the late 1980s, while other regions and off-season are neglected. This reflects partly the basic structure of tourism demand towards Turkey and most importantly a lack of a national tourism policy and the failure of present policy and strategies to combat the potentially damaging effects of tourism on social and environmental resources and increase and spread the benefits of tourism as much as possible The second chapter tries to put temporal and spatial imbalance in general and in Turkey into perspective.

Turkey has great unspoiled natural, cultural and historical resources and potential which will allow Turkey to develop supply-led tourism products as well as demand-led products and to combine both products in order to create market-led products, improving the uneven temporal and spatial distribution of tourism. After describing the methodology in the third chapter, the fourth chapter identifies the demographical and motivational characteristics and the reasons behind their seasonal and spatial preferences which indicate that each shoulder and each destination has its own segment.

Regional tourism development policies, strategies and plans with goals to reduce both spatially and seasonally uneven distribution of tourism should be introduced. The tourism industry indicates great importance for Turkey and specifically for less-developed tourism regions of Turkey due to its unique advantages. The fifth chapter discusses the effects of temporal and spatial disparity in Turkey, explores the development and marketing options available for developing tourism destinations to follow, such as, encouraging tourism in certain regions by giving incentives, completing infra- and super-structure and promoting and marketing currently available and potential tourism products in those regions or encouraging tourism in all regions regardless of the type and location of products.

It is obvious that there is a relationship between temporal and spatial imbalance. Therefore, understanding these relationships can and will help to achieve better balanced tourism development and management in Turkey, as well as other developing destinations. The development of Turkish tourism is still at its early stage and appropriate actions against present and future problems can prevent or avoid tomorrow's difficulties.

This study aims to identify and diagnose spatial and temporal problems and the relationships between these two problems and contribute to the tourism industry by developing effective development and marketing strategies.

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Definitions (Abbreviations)

ALS	Average Length of Stay
DTFI	Defert's Tourist Function Index
TII	Tourism Intensity Index
OTII	Overall Tourism Intensity Index
FTII	Foreign Tourism Intensity Index
TTII	Turkish Tourism Intensity Index
TMT	Turkish Ministry of Tourism
WTO	World Tourism Organisation
TURSAB	Association of Turkish Travel Agencies
TUGEV	Turkish Tourism Development Fund
TUREM	Tourism Training Centres
YOK	Council for Higher Education in Turkey
SPO (DPT)	State Planning Organisation
SIS (DIE)	State Institute of Statistics

Chapter 1

Introduction

1.1. The need for research

The lack of understanding and perception of the importance of seasonal and spatial imbalance in tourism from the viewpoint of all interest groups and the consequent shortage of interest in the research into the matter by both practitioners and particularly researchers in the academic institutions has resulted in much talk on the causes and remedies but no comprehensive research and practical development policy and strategies involving all aspects of tourism development and all agencies of the industry. As Allcock (1989, p.387) points out;

> '*the seasonality of tourism is simultaneously one of its most widely recognised features and one of its least well researched. Perhaps these two aspects are tied together, in that the acceptance of acute seasonal fluctuations in trade as being normal and even necessary on the part of its practitioners, has been a principal factor inhibiting research into the phenomenon*'.

'*Tourism is a stimulant for regional communities driving broader economic, social and environmental benefits, in terms of enhancing the quantum and scope of job opportunities, new and improved services and facilities, and social and cultural benefits*' (O'Clery, 1999, p.1). However, Differences between the regions or provinces in many destination countries are also an important issue concerning the consequences of over- and under-utilisation of certain resources and distribution of benefits between the regions resulting from development of tourism. In most developing countries, where national economy comes first, short-term economic gains from tourism prevail over long-term benefits from a sustainable and long life tourism resources and facilities. The regions which are more profitable in short-term and attract significant tourism demand from overseas are developed and exploited and others are neglected. Most regional development policies and strategies aim to contribute to regional growth and the wealth of the regions by exploiting and developing regional tourism resources in an effective way and distributing all the positive benefits of tourism as equally as possible between the regions and between its people. These policies and strategies are not often practised as much they are preached due to various reasons especially in developing countries. Political instability, government changes, conflicting interests, weak economy, lack of recognition of tourism in the regional development and prosperity, and many other similar factors hamper the implementation of tourism policy and strategies. As Hinch (1991) states, tourism and its impacts are characterised by spatial variation and officials try to influence the location of development areas to maximize the perceived benefits of the industry. However, according to Hinch, the theoretical understanding of the spatial tourism development process has not kept pace with the practise of intervention into this development process.

As O'Clery (1999) states it would be wrong to assume that tourism makes a contribution to every region as some regions may have limited potential. However, in many cases, these inequalities between the regions are often not the result of inadequate and unattractive resources and attractions in less-developed tourism regions, but the neglect by all three sectors of the industry; governments, non-profit organisations and businesses which all turn their attention to currently available popular resources rather than exploring and developing potential and new resources. All these sectors must share the responsibility of development of year-round and equally distributed tourism in all regions by considering the long-term benefits rather than short-term profit. By compromising their stakes in development and investment in favourable places, they could contribute to the development of tourism and its benefits to the local economy in less-favourable regions. Surely, it cannot be possible developing tourism simultaneously and at the same level in all regions throughout the country. However, the local, regional and national economy and, as a consequence people and visitors alike, may enjoy the benefits and advantages of tourism with a priority ranked resource development, promotion and marketing. As Bonnett (1982) states, with an adequate and logical market analysis, understanding each individual markets, needs and desires of consumers and professional approach in practising marketing programmes, present and potential tourism products can have a fair share of tourism, because marketing works and reaches the projected goals.

As one of the rapidly developing countries, Turkey also desperately needs foreign currency to keep the national economy developing and strengthening and the tourism industry is seen to have a major role in attaining this goal. The tourism industry emerged around 30 years ago with mostly cultural tourism which is usually less-seasonal and less concentrated as it is spread across the country and throughout the year. The main purpose of foreign visitors to Turkey was cultural and to experience the rich Anatolian heritage in Istanbul and throughout Anatolia by Anatolian coach tours, although number of visitors was rather lower at that time. However, since the beginning of 1980s, there has been a dramatic change in the number of tourist arrivals, tourism receipts and tourism development in Turkey. Market demand for coastal tourism products resulted in attention and incentives being focussed on tourism development in coastal areas, although, there has been slight change in recent years. Subsequently, a concentration of tourist activities in coastal areas and in the summer season when demand is at its highest, has emerged.

Turkish tourism authorities, the Turkish Ministry of Tourism, provincial tourism directorates, different profit-making and non-profit-making organisations and individual hotels and tour operators still turn a blind eye to seasonal and spatial tourism problems. As Gunn (1994) states, all sectors involved in development of tourism supply should work to meeting desires and needs of the travel market for successful tourism development and marketing. Although, the economic impacts of tourism on the national economy have been continuously emphasised, discussions on the importance of the development of off-season tourism to utilise unused resources throughout this period and its economic and social contribution seldom receive attention. Fortunately, although it is inadequate, there have been some activities to encourage tourism development in other less-

developed regions. However, there is little evidence that the policies have worked apart from a slight increase in bed capacity.

It is particularly difficult to find research-based publications dedicated to combined seasonal and spatial tourism development. Most literature either focuses on different aspects of the seasonal or spatial problems, measurement of seasonal fluctuations in demand or concentrates on employment and social problems caused by the seasonal and spatial disparity in tourism. Gunn (1994) states that whenever demand and supply are out of balance, planning and development should be directed toward improving the supply-demand match, only through analysis of both demand and supply can a region, destination, or site know how to plan and all supply side components - attractions, transportation, services, information, and promotion - must be planned and developed to meet the needs of markets.

There is enough evidence that awareness and research into the problem can and will help the industry and the national economies. It is very important that the problem must be identified and diagnosed as early as possible, or if possible, via effective planning and policies preventing it even before the problem comes into existence in order to avoid possible troubles and loss of potential revenue. Turkey, as one of the recent popular destinations, should take the necessary measures before the tourism industry reaches the maturity and regional and seasonal problems deteriorate.

1.2. Aim

- To investigate and analyse temporal and spatial patterns of Turkish tourism and to develop effective tourism strategies to form a spatially and temporally more evenly distributed Turkish tourism product.

1.3. Objectives of the investigation

- To analyse and evaluate the monthly international tourist arrivals to Turkey by country by using different measurement techniques to find out seasonal and counter-seasonal tourist markets to Turkey and examine the nature, characteristics, causes and effects of seasonality in Turkey.

- To identify the characteristics, determinants and motivations of peak and off-season tourist markets and segments to Turkey in general and to the different regions of Turkey.

- To evaluate present tourism policies, strategies and measures taken by the public and private sector and to identify the present and potential peak and off-season resources of Turkish tourism in different regions which can be developed to improve seasonal and spatial imbalance.

- To assess possible solutions to the temporal and spatial problems and to develop effective tourism strategies and guide-lines for the Turkish tourism authorities and the Turkish tourism industry to overcome seasonality and imbalanced tourism supply and demand.

1.4. General Outlook of Turkey as a Tourism Destination

Being a peninsula between three continents, surrounded by seas, displaying significantly different characteristics, having altitude differences from sea level to over 5000 meters and consequently having a diversified climate, offer Turkey great value in terms of biological diversity (T.C. Cevre Bakanligi, 2000). Anatolia, connecting three continents, has been a meeting point of several civilizations and cultures for centuries. For this reason, it has very rich historical and cultural values, distinctive geological characteristics, flora and fauna and climate throughout its regions which differs it from the other parts of the world. An opportunity to experience all seasons at the same time and all other features together with traditional Turkish hospitality and tolerance make Turkey attractive to tourist all over the world. In order to be able to understand the current position and situation of Turkey, Turkish tourism and the actual causation of the seasonal and spatial imbalance problem, it is first necessary to introduce Turkey as a country which indicates significantly different features than any other neighbouring countries and competitors. Turkey is presented in terms of its geographical location, geography, climatic conditions, flora and fauna, the people and the culture, and finally economic and political structure.

1.5. Geographical features of Turkey

Geographical location

Turkey is located at the point where Asia, Africa and Europe, three old continents of the world, are the closest to each other. The country lies partly in Asia and partly in Europe at the eastern edge of the Mediterranean Sea. Its location in two continents has been a central factor in its history, culture and politics. Therefore, Turkey has often been called a bridge between the East and the West. Sea of Marmara, Bosphorus and Canakkale Straits together not only separate the European Turkey from the Asian part, but also connect the Black Sea to the Aegean and Mediterranean Sea.

Turkey is surrounded by sea on three sides; the Mediterranean on the south, the Aegean on the west, the Black Sea on the north and finally as an interior sea the Marmara in between the Aegean and Black Sea. The country occupies 779,452 sq km with 97% in Asia (Asia Minor or Anatolia) and 3% in Europe (the Thrace), approximately three times bigger than U.K. Its' 8.333 km coastline forms 75% of the total length of the borderline.

Regional Geography

Turkey is divided into seven geographical regions according to their topographical structure:

1. The Marmara
2. The Aegean
3. The Mediterranean
4. The Central Anatolia
5. The Black Sea
6. The East Anatolia
7. The Southeast Anatolia

Part of the belt of young mountain ranges that runs from the Balkan peninsula to Iran forms the Turkish mountainous relief. The Anatolian Plateau's average altitude is 1,100 meters and it rises more than 2,000 meters towards the Eastern Anatolia. The primary mountains of the country are outlines as follows (State Institute of Statistics, 1996):

The main ranges of Turkey:

- Yildiz Mountains in the Marmara region
- Golgeli, Aydin, Boz, Alacam, Sultan and Emir Mountains in the Aegean region
- Bey, Ak, Akcali and Bolkar Mountains in the Mediterranean
- Ala, Tahtali, Dibek and Binboga Mountains in the Central Anatolia
- Ilgaz, Canik, Giresun, Mescit, Kackar and Yalniz Cam Mountains in the Black Sea region
- Otlukbeli, Palandöken, Munzur, Cilo, Aras South, Mercan, Bingol, Mus South, Ihtiyar Sahap and Hakkari Mountains in the East and Southeast Anatolia

The Toros Daglari (Mt. Taurus) in the south and the North Anatolian Mountains (Mt. Pontic) in the North which consist of some ranges mentioned above encircle the Anatolian Plateau and meet in the East with highest mountains.

The most important peak of Marmara region is the Uludag (2543 m) at the same time it is a major winter sports and winter tourism centre. In the Aegean region, the mountains fall perpendicularly to the sea. The western and central Tarsus Mountains suddenly rise up behind the in the Mediterranean coastline in south of Turkey. The Central Anatolia Region gives the appearance of being less mountainous compared with other regions. The Eastern Anatolia region is Turkey's largest and highest region. About three-fourths are at an altitude of 1500 - 2000 metres. There are numerous inactive volcanoes in the region, including Nemrut, Suphan, Tendurek and Turkey's highest peak where Noah's Ark was landed, Mount Agri (Ararat) is 5165 metres high.

Turkey is rich and lucky in terms of rivers and water resources. Most of the rivers of Turkey flow into the seas surrounding the country. The Firat (Euphrates) and Dicle (Tigris) join together in Iraq and flow into the Persian Gulf. the Kizilirmak, Yesilirmak and Sakarya, flow into the Black Sea. The Susurluk, Biga and Gonen pour into the Sea of Marmara, the Gediz, Kücük Menderes, Büyük Menderes, and Meriç into the Aegean and the Seyhan, Ceyhan and Göksu into the Mediterranean. Turkish rivers have generally irregular and shallow beds, and seasonal changes in depth make them unsuitable for navigation. However, many dams including the world's fourth and sixth largest

dams; Keban and Ataturk, have been constructed on the Turkish rivers for hydro electricity and irrigation purposes.

There are many natural and artificial lakes in the country. Except for the biggest lakes which are located in Eastern and Central Anatolia, other medium and small sized lakes are located principally in two regions that are called the Goller Bolgesi (the Lake District) in between the Central Anatolia, the Mediterranean and the Aegean regions, and South Marmara. The principal natural lakes of Turkey are:

As well as natural lakes, resulting from the construction of dams, several large dam lakes have come into existence. The biggest dams of the over 125 dams of Turkey are the Ataturk, the Keban, the Karakaya, the Altinkaya, the Adiguzel, the Kilickaya, the Karacaoren, the Menzelet, the Kapulukaya, the Hirfanli, the Sariyar and the Demirkopru

All these natural and artificial lakes are generally used for fishing, producing salt, producing electricity, growing reeds and sugar canes and irrigation. The lakes which have potential for tourism activities will be tried for use in the tourism industry in the very near future. Some projects have already begun.

As indicated above, the geographical outlook of Turkey is spectacular, ranging from green fertile hills and valleys and flat river plains, to wild rocky mountains and barren plateau. There are many natural wonders such as the rock waterfalls, springs of Pamukkale and the stone carved landscapes of Cappadocia, unspoilt national parks, caves as well as extensive beaches along the coastline. In other words, essential natural potential to support tourism and to attract all kind of tourists who are interested in different attractions of the country is available throughout the country. Varied geographical features, size of the country and its potential are ready to be exploited to expand the Turkish Tourism in terms of both arrivals and receipts, and to prevent seasonal and regional concentration of tourism and its seasonal problems.

Climate

Climate is an important factor for tourists to determine or choose a destination and holiday time. They select a destination where the climate is suitable to their holiday aims which can be skiing in winter, windsurfing in the summer etc. Turkey is lucky and rich in terms of climatic types which vary and depend largely on geographic factors. While the coastal regions are generally humid, the interior regions are semiarid because they are protected from the rain bearing winds by the mountain ranges which encircle the Anatolian Plateau. Obviously, types of climate in different regions affect the economic activities such as agriculture, vegetation, animal life and tourism. Although nine of the world's climatic types have been seen, there are three dominant types: Sub-

tropical (transitional type), Sub-tropical (Mediterranean type) and Semi-arid (Steppe type) (See Table 1.1.)

The Black Sea region and coasts have a transitional climate between Mediterranean and humid sub-tropical types. A more temperate climate is seen in the region because of marine influence of the Black Sea and because it is protected from the cold or hot air of the interior by the mountain ranges. This region enjoys warm summers, mild winters and plenty of rain all throughout the year.

Table 1.1 The average temperature, humidity and precipitation by regions

	The average temperature, humidity and precipitation by regions				
	Temperature (°C)			Average	Average (mm)
	Average	Highest	Lowest	Humidity %	Precipitation
Marmara	13.5	44.6	-27.8	71.2	654.3
Aegean	15.4	48.5	-45.6	60.9	569.0
Mediterranean	16.4	45.6	-33.5	63.9	706.0
C. Anatolia	12.3	44.2	-32.8	70.9	828.5
Black Sea	10.6	41.8	-36.2	62.6	392.0
East Anatolia	9.7	44.4	-45.6	60.9	569.0
S.E. Anatolia	16.5	48.8	-24.3	53.4	584.5
The Prime Ministry, General Directorate of Press and Information, Turkey 2000, Ankara, Turkey					

The Marmara, the Aegean and the Mediterranean coasts have Mediterranean type of climate, with hot, almost completely dry summers and mild, moist winters. Especially along the Mediterranean coasts frosts are rare and snowfall is almost unknown. The climate of the Mediterranean and Aegean region provides many opportunities for tourism and agricultural activities and to use all assets of the region throughout the year.

In contrast, interior regions of Anatolia have semi-arid climate and summers are relatively hot and winters are cold, long and temperatures are often below freezing. Snow cover lasts 22 to 40 days in Central Anatolia and around 115 days in Eastern Anatolia. As seen in Table 1.1, Central and Southwest Anatolia has the lowest average temperatures and the lowest precipitation figures.

Flora, fauna and animals

In Europe, there are 11,500 kind of flora with flowers. According to 11th volume of Flora of Turkey and the East Aegean Islands which is originally prepared by Peter H. Davis of Edinburgh University and the latest volume has been published by Turkish scientists, this number is 9,222 in Turkey and 2991 of this flora only grow in Turkey (Guner et al., 2001). It is an unfortunate that Turkey is not very rich in terms of forests. Although, principal forests are densely located in the Black Sea region because of its climate and plenty of rainfall throughout the year, there are also some forests in the other regions, in particular in the Aegean and the Mediterranean regions. On the other hand, the Anatolian interior is a region of steppes.

The first national park in Turkey was established in 1958. Since then their numbers have increased to twenty-one. Some of these parks, which were initially established for archaeological and historical purposes, are at the same time rich habitats where biological diversity is being protected. The regional distribution of national parks in Turkey is as follows: Mediterranean (6), Central Anatolia (5), Marmara (3), Black Sea (3), Aegean (2) and Eastern Anatolia (2).

Despite the shortage of wood-lands, Turkey is fairly rich in wild animals and game birds. Although, Asian animal types are generally dominant, European and rare African animal types have also been seen. This is because Turkey is a natural passageway of various types of fauna between Asia, Europe and Africa. The lynx, wolf, bear, fox and jackal are common carnivorous types, the gazelle, deer and boar are the major herbivorous types and the pheasant, partridge, stork and vultures are the more common larger birds. Turkey is the habitat of the same animals that can be found in the European countries, plus many from Asia and Africa. There are 60,000 animal species in the whole continent of Europe. Turkey has 80,000 animal species. Turkey is home to birds of many kinds, especially in the "Birds Sanctuaries" the national park on Lake Manyas, Sultan Sazligi near Kayseri, in Izmir Camalti Tuzlasi etc. There are forty animal protection areas and they are located throughout Turkey. Fallow Deer, Roe Deer, Bald Ibis, Pheasant, Francolin, Partridge, Deer, Wild Goat, Water Fowl, Wild Sheep and many other animals protected in these protection areas.

The available forests, flora, fauna and animals have not utilised enough as significant and potential tourism resources yet. Whereas these resources can attract many travellers who may want to participate in special interest tourism such as adventure tourism, trekking, hunting, photo-safaris, fly-fishing and bird watching.

1.6. The people and the culture

Because of its geographical location, Anatolia, has witnessed the mass migration of diverse peoples shaping the course of history. Anatolia has emerged throughout ages as the origin of more than 30 civilizations and has developed a unique synthesis of cultures, each with its own distinct identity, yet each linked to its predecessors through insoluble treads. The Hittite, who entered Anatolia via the Caucasus Mountains, integrated with the Hattie and established the first social and political organisation in Anatolia. The Hurrians, Luwians, Urartians, Phrygians, Lydians, Carians, Lycians, Ionians, Byzantines, Seljuks and Ottoman Turks all established great civilisations here.

It has also been important as a centre of commerce and as an important part of the Silk Road because of its connections to three continents and the sea surrounding it on three sides. As an ancient land and modern nation; Turkey today undertakes the responsibility to preserve the common heritage of mankind as both the inheritor and conservator.

With the nearly 68 million people, Turkey is one of the biggest countries in Europe and the Middle East in terms of both land and population. Turkey has had one of the highest rates of population increase in the world, although it indicates a declining trend. The annual population growth was averaged 2.6% in between 1980 and 1990 and 1.8 in between 1990 and 2000 (DIE 2003). Despite this rapid increase, the country is not heavily populated in comparison with European and neighbouring countries. However, the geographical regions in Turkey display different characteristics from the aspect of the distribution of population. The population is heavily concentrated in the western regions, coastal regions and around the industrial centres. The interior regions usually have less population. Antalya as the most important tourism centre of Turkey has attracted so many immigrants particularly from the Eastern and interior Turkey. Migration from rural areas into cities, especially into big urban cities and tourism centres such as Istanbul, Ankara, Izmir and Antalya, has been a demographic problem for many years, but 35% of the population still live in rural areas.

The most notable feature of the population is the proportion of young people. Although it indicates a decreasing trend, the 0-14 age group forms 35% of the whole population, whilst the 65 plus age group is just 4.3%. Therefore, Turkey has a young, active population, which plays important role in tourism activities (Table 1.2).

Table 1.2 Population profile of Turkey

Population								
	1980	%	1985	%	1990	%	2000	%
Male	22695362	50.7	25671975	50.7	28607047	50.7	34200000	50.4
Female	22041595	49.3	24992483	49.3	27865988	49.3	33600000	49.6
Total	44736957		50664458		56473035		67803927	
% of urban and rural population in total population								
	1965	%	1985	%	1990	%	2000	%
Urban		34.42		53.03		59.0	44006274	64.9
Rural		65.58		46.97		41.0	23797653	35.1
Population by age								
	1980	%	1985	%	1990	%	2000	%*
0-14	17433912	38.96	19010138	37.52	19745352	34.96	NA	
15-44	19342054	43.23	22601839	44.61	26489897	46.91	NA	
46-64	5680304	12.67	6830456	13.48	7775941	13.77	NA	
65+	2113247	4.72	2125908	4.19	2417363	4.28	NA	
Unknown	167440	0.37	96117	0.19	44482	0.08	NA	

Source: State Statistics Institute (DIE) 2003 and The Prime Ministry, General Directorate of Press and Information, Turkey 2002, Ankara, Turkey

Turkish, spoken by about 150 million in the world, is the mother tongue and official language and written in Latin script. The Turkish language is spoken over a large geographical area in Europe and Asia; it is spoken in the Azeri, the Turkmen, the Tartar, the Uzbek, the Baskurti; the Hogay, the Kyrgyz, the Kazakh, the Yakuti, the Guvas, and other dialects. After the formation of the Turkish Republic in 1923 and following the achievement of national unity, the Latin alphabet using Turkish phonetics was adopted in 1928.

Although, 99% of the population is Moslem while the remaining Christians and Jews represent 1%, Turkey is a secular state and gives complete freedom of worship to non-Moslems, all citizen are equal and have same rights. In secular Turkey, all religious affairs are carried out by a central government organisation affiliated to the Prime Ministry, namely the Department of Religious Affairs.

In terms of cultural values, Turkey is very rich and colourful. Each region of the country has different traditions, customs, cultural values and habits as well as countrywide common customs and cultural values. Many cultural activities, celebrations, festivals are seen throughout the year if different regions in the country.

1.7. Economy

Turkey has experienced massive industrialization and modernization especially since the end of World War II. Despite these efforts, the country is still strongly agricultural and employs about half of the labour force in agricultural activities. The Southern Anatolia Development Project (GAP) (one of the largest projects of this type in the world) plans to convert semi-arid unfruitful areas into agriculture by using irrigation facilities. As a result, agricultural areas will at least double and less-developed Eastern and South-eastern Anatolia will have many economic, social and cultural opportunities to develop. However, while the importance of commercial agriculture, manufacturing, construction and service industries has increased, the role of agriculture in the economy has relatively declined. In this regard, the tourism industry has become an important element in the Turkish economy for last fifteen years. On the other side, industrial production is rising but agriculture and the energy sectors are given top priority (Table 1.3, 1.4).

Table 1.3 Gross National Product of Turkey by sectors

Share in Sectors %, in current prices							
Sectors	1968	1980	1985	1990	1994	2001	2003
Agriculture	40.1	26.1	19.7	17.5	15.5	12.9	11.8
Industry	17.0	19.3	21.7	25.5	26.4	25.3	24.9
Service	42.9	54.6	58.6	57.0	58.1	61.8	63.3
GNP	100	100	100	100	100	100	100
GNP (per capita $)	---	1570	1356	2711	2169	2143	3390

Source: The Prime Ministry, (2005a) Planning Organisation, Ekonomik ve Sosyal Gostergeler (1950-2004) Ankara, Turkey
The web site of The Prime Ministry, State Planning Organisation (2005b) www.dpt.gov.tr

Turkey is also rich in minerals compared with its neighbouring countries and it is the tenth richest country in the world with 29 different minerals, but some of these have not been exploited on a large scale because of financial difficulties. Other the minerals, such as copper and chrome have been exported.

The Turkish Government has actively promoted economic development since 1930s to accelerate the industrialization by constructing and operating manufacturing, mining, banking and power facilities. In order to stop worsening economic conditions in the country, the stability measures, including a flexible foreign exchange system, liberalization of imports, export promotion, abolition of subsidies and a new flexible and realistic interest rate system, came into operation on 24 January 1980 and it has been successful since then. Private enterprise has been encouraged in the Five Years Plans since 1981 and considerable structural changes and improvements have already been achieved. The privatization process continues and public sector owned enterprises have been privatised one by one.

Table 1.4 Gross Fixed Capital Investments by sectors

	Gross Fixed Capital Investments by sectors (%)at current prices											
	Public Sector Investments						Private Sector Investments					
	1963	1970	1980	1990	2000	2004	1963	1970	1980	1990	2000	2004
Agriculture	16.2	13.5	7.9	9.6	8.6	7.7	10.6	7.6	7.4	3.6	2.6	2.7
Mining	6.6	5.0	7.6	3.4	1.1	1.0	0.8	0.8	0.5	1.1	1.1	2.2
Manufacturing	10.2	19.8	26.3	4.5	2.8	2.5	50.7	38.8	30.0	26.2	26.7	39.5
Energy	8.9	17.2	21.3	21.7	15.0	18.8	0.4	0.4	0.4	0.8	2.9	3.1
Transport	28.0	21.1	20.8	34.0	35.7	26.1	2.9	7.5	9.7	10.7	26.2	17.0
Tourism	**0.5**	**1.3**	**0.5**	**1.2**	**0.5**	**0.7**	**0.3**	**0.3**	**0.6**	**5.0**	**5.6**	**8.6**
Housing	3.3	4.5	2.4	4.0	0.8	1.0	26.9	37.3	44.7	46.5	23.7	14.4
Education	12.8	8.1	4.1	6.9	11.8	14.0	0.4	0.4	0.2	0.7	2.3	1.6
Health	2.3	2.5	1.8	2.8	4.5	5.6	0.2	0.2	0.2	0.9	4.2	4.0
Other services	11.1	6.8	7.2	11.9	19.1	22.6	6.8	6.7	6.3	4.4	4.7	6.9
Total:	100	100	100	100	100	100	100	100	100	100	100	100

Source: The Prime Ministry, State Planning Organisation (2005a) Ekonomik ve Sosyal Gostergeler (1950-2004) Ankara, Turkey

While some sectors share in public capital investments have decreased, some others' share has increased steadily (Table 1.4). The share of tourism sector in total public capital investments shows differences through the years ranging from 0.5 to 1.3. In 1963, tourism remained in the last position in ten sectors since 1963. In contrast, private sector capital investments have shown a significant increase through the years. Private sector capital investments recorded as high as 5.6 percent in 2000 and 8.6 percent in 2004 as a result of several incentives given to private sector after 1983. As tourism demand to Turkey increases, in order to benefit from and meet this increasing demand as much as possible and expand the market as far as possible, investments have been advanced by both private and public sectors. This statement is evidenced by the development of the accommodation industry as will be seen through the study.

1.8. Political Structure

Turkey is a republic and the capital is Ankara. The political authority is centred in the Turkish Grand National Assembly (T.B.M.M.). The president is elected by the T.B.M.M. for seven years. Members of the 550-seat unicameral parliament are elected for five years, however, the T.B.M.M. can decide on early elections.

Turkey has experienced considerable political revolution alongside the economic development for ten years. In the mean time, as an associate member of EU, Turkey applied for the full membership to the European Community in 1987. It gives much importance to peaceful and friendly relationships with other countries and it is a founding member of O.E.C.D., a member of NATO, the Council of Europe and the United Nations.

1.9. Development of tourism industry in Turkey

The Turkish tourism industry has indicated rapid development and this affects other sectors of the economy and the improvement of cultural, economical and trade relations with other countries in a positive direction. Significant developments have been recorded in tourism planning, education, promotion and infrastructure which have been guided and co-ordinated by the Turkish Ministry of Tourism in recent years.

After World War I, and in particular after the world economic crisis at the beginning of 1930s, the newly emerging upper and upper middle class people in the cities introduced a taste for beach holidays and its period which became the starting point of Turkish domestic tourism on a significant scale. This period of the twentieth century was also a glorious time for long-distance rail travel and the Trans-Orient-Express for which Istanbul was the last stop. There were also some international tourism movements in Turkey, as well. It was only after collapse of the Ottoman Empire that the new young republican Turkish government started to encourage tourism, opened Ottoman Palaces to the public and some of them were turned into museums, such as Topkapi Palace and Asia Sophia (Saint Sophia). On the other hand, although the rail network spread throughout Turkey and on into other parts of Asia, there was not enough suitable accommodation, this meant that the tourism industry was primarily restricted to Istanbul as far as foreign tourists were concerned.

As a result of the guidelines and incentive laws Turkish tourism started to grow in the 1950s. The foundation of the Ministry of Tourism followed in 1963 and national tourism policies and objectives were included in Five Year Development Plans. In other words, the organised development of the Turkish tourism industry was started in 1960s. However, the contribution of the tourism industry to the national economy was not understood very well despite several incentives. Arrivals and receipts worsened in the 1970s due to the military intervention to the Turkish government, the worldwide fuel crisis, the Cyprus conflict and financial embargoes by several countries. Furthermore, the invasion of Afghanistan by USSR and the Iran-Iraq War in the neighbouring area affected Turkish tourism in a very negative direction. However, thanks to stability in and around Turkey and measures taken by the government, the situation improved during the 1980s and 1990s.

The tourism industry is accepted as a sub sector in the Five-Year Development Plans under the heading of service industries. The main objectives of tourism development in the Five Year Development Plans in the 1960s were;

- to benefit from economical, social and cultural impact of tourism
- to contribute to balance of payments
- to benefit from its foreign exchange effects as a tool for industrialisation.

However, there were differences between the goals in these plans and implementation. The main reason for this was the lack of national physical planning and financial sources to support the industry. The shortage of budget allocations and capital investments together with political instability were the main hindrances in the rapid development of the Turkish tourism industry.

The limited and inadequate financial sources and promotion and marketing budget pushed tourism authorities to constrain tourism development in an area between Balikesir on the Aegean Coast and the Antalya on the Mediterranean Coast, which offered popular, coastal tourism products for mass tourism (Table 1.5). Turkish tourism authorities adopted a mass tourism policy to increase, and to meet demand for, coastal tourism products on the Aegean and Mediterranean coasts without evaluating alternative development plans, the variety of tourism resources throughout the country and a comprehensive cost-benefit analysis at a macro-level.

Table 1.5 Promotion and Marketing Budget of Turkish Ministry of Tourism ($ million)

	Promotion and Marketing Budget of Turkish Ministry of Tourism ($ million)										
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Budget	10.4	12.8	25.3	28.4	36.0	34.4	37.2	33.2	19.9	17.0	79.7
	2001	2002	2003	2004	2005						
Budget	61.0	90.0	84.0	93.0	96.3						
Turkish Ministry of Tourism, (2005) Promotion and Marketing Budget of Turkish Ministry of Tourism, General Directory of Promotion, Ankara											

However, significant improvements have been recorded since 1983 with new and open-minded reformist governments who have understood the importance of tourism from several perspectives. The 1980s were the starting point of a new era for the Turkish tourism. After a military regime, the new civil government adopted a free market economy, liberalisation, privatisation and currency convertibility policies and abolished import substitution and protectionist policies. In this respect, a series of measures were taken and new laws were made. As Table 1.5 shows the promotion and marketing budget of the Turkish Ministry of Tourism has been significantly increased since 2000 and reached its peak in 2005 indicating the importance given to tourism industry in Turkey. Participation in international activities such as tourism fairs and exhibitions, the number of commercials on TV, radio, papers and other audio-visual tools have been increased as a result of better and increased budget figures.

The Tourism Encouragement Law which provided various incentives to investors and strengthened the authority of the Ministry of Tourism in the planning and development of tourism was passed.

The main incentives based on the Tourism Encouragement Law No: 2634 are as follows (Turkish Ministry of Tourism, 2000):

- Allocation of public lands to investors on long term basis
- Provision of basic infrastructure by the state
- Provision of medium- and short-term finance for the construction, furnishing and operation of tourism facilities.
- Discounted tariff rates for electricity, water and gas consumption in primary tourism areas and centres.
- Priority for the installation of telecommunication facilities
- Foreign personnel employment in compliance with law up to 20% of total.
- Same exemptions from customs tax
- Provision of encouragement premium and investment allowance
- Provision of financial support from the Tourism Development Fund
- Tax, duties and fees exemption for long- and medium-term investment credits
- Exemption from building construction duties
- Postponement of Value Added Taxes (VAT)

As a result of these incentives and the reformist policies which support these incentives, Turkey has made considerable amount of investments on tourism. Communication, transportation, accommodation and tour operation have improved steadily. The private sector took the initiative in almost all investments in the tourism industry. Since the 1980s both the public and private sector have made great efforts for further and better development despite some disagreements and problems time to time. In respect to incentive policies, deluxe class hotels on the coastal regions experienced problems for a certain period in matching supply and demand and they had to lower their prices down to very low levels as so many entrepreneurs invested on deluxe hotels and oversupply occurred.

When tourism investment incentives and foreign tourism investments in Turkey between 1991 and 2003 are analysed, they indicate great inconsistencies through the years possibly being affected by financial and political problems faced in Turkey (Table 1.6). While tourism investment incentives have declined since 1997, fixed capital investment figures have continued to grow. However, the share of foreign investments in total decreased to as low as 1.6% in 2000 which is undesirable for a promising destination country. The lion share of foreign investments also goes to mainly large cities and resorts such as Istanbul, Ankara, Izmir, Antalya, Mugla and Aydin for the construction of international chain hotels, holiday villages. However, the figures in 2003 look promising as the share of foreign investments in Turkish tourism in overall foreign investments in Turkey increased to 4.0%. It is expected that with a stable Turkish economy, politics and rapidly growing tourism industry more foreign investors will invest in Turkey in the coming years. As Alkin (2001) states, it is quite clear that foreign investment is attracted much easily when the national development trend is stable. However, as he warns, the foreign fixed capital investment alone is not enough to achieve

the stable growth in national economy, the governments should not change laws and incentives often and at unexpected times, and promises should be kept to attract more foreign investment.

Table 1.6 Tourism Investment Incentives and Foreign Tourism Investments in Turkey

Development of Tourism Investment Incentives and Foreign Tourism Investments (1991-2003)						
Year	Tourism Investment Incentive Certificates (USD)	% Share in Total	Fixed Capital Investments (USD)	% Share in Total	Foreign Tourism Investments	% Share in Total
1991	366,000,000	4.0	976,000,000	4.0	240,000,000	12.2
1992	257,000,000	3.4	1082,000,000	2.9	108,000,000	5.9
1993	605,000,000	2.9	1,056,000,000	2.2	107,000,000	4.7
1994	227,000,000	3.1	712,000,000	2.2	57,000,000	3.8
1995	452,000,000	0.9	974,000,000	2.4	175,000,000	6.0
1996	501,000,000	2.0	977,000,000	2.1	129,000,000	3.4
1997	1,025,000,000	4.7	1,090,000,000	2.1	240,000,000	14.3
1998	820,000,000	5.2	1,465,000,000	2.8	52,000,000	3.2
1999	715,000,000	6.4	1,625,000,000	3.9	40,000,000	2.4
2000	520,000,000	3.7	1,860,000,000	4,0*	50,000,000	1,6
2003	1,820,000,000	10,5	3,702,144,000	9,5	42,200,000*	4.0*
* State Planning Organisation (2005b) * Figures for January-June 2003 period only						

By the first Five Year Development Plan, there were no definite tourism policies set by the authorities. The 1961 constitution encouraged and initiated the planned development which aimed the economic use of national resources and keep economic, social and cultural stakes at balance. The National Tourism Policy aims, objectives and principles can be outlined as follows (Turkish Ministry of Tourism, 1999):

The aims:

- To develop an effective and competitive tourism economy
- To create most favourable social atmosphere for tourist and local people alike
- To protect, develop and improve natural and cultural assets

Objectives:

- To develop tourism supply further (services, infrastructure, superstructure)
- To develop tourism evenly distributed in time and space
- To increase the share of Turkey in international tourism markets
- To provide better atmosphere to tourists
- To encourage Turkish Citizens to take holiday
- To make sure that local public benefits from the tourism
- To use natural and cultural sources efficiently by considering short and long-term needs
- To keep the harmonization between the natural resources (environment) and the investments

Principles:

- The role of the state in provision of atmosphere
- Free pricing
- Free competition
- Harmonisation between the sectors
- Continuous review
- Technological improvement
- Balanced use of resources

- Planned development
- Systematic approaches to development of tools and application
- Rational project evaluation
- Co-ordination
- To reduce dependence to foreign countries

Tourism Marketing Policy

- Improvement of Turkey's image
- Orientation of preferences
- Development of tourism products best suit to demand
- Development of domestic tourism
- Utilization of support systems

Strategic Objectives

- Creating human orientated National Tourism Policy sensitive to environmental, historical, cultural and social values.
- Functioning the Ministry of Tourism as coordinator and strategic decision maker
- Creating a market oriented sector operating in liberal economy by rational and effective planning
- Creating 21st century's supply by practising the total quality understanding
- Promoting destinations to develop and improve their images and increase the tourism receipts
- Preventing the discrimination between foreign visitors and Turkish Citizens in terms of holidaying conditions

Actions

- Incentive policies will be developed to attract investments in winter tourism, hunting, water-sports, festivals, health, youth, congress, thermal, golf and third age tourism
- The number of qualified personnel employed in the industry directly or indirectly will be increased, their qualification will be improved by organising training courses.
- Priority will be given to the improvement of tourism infra- and superstructure
- Cultural and natural heritage will be conserved and tourism plans and activities will be planned by taking cultural and environmental landscape into consideration.
- Charter flights will be improved and Turkish travel agencies will be encouraged to operate tours in and out of the country
- Necessary measures will be taken in current tourism establishments to increase and improve occupancy rates, prolong the season and improve the quality.
- Priority will be given to protection of natural and cultural resources and certain areas will be opened for tourism investment after essential protection measures are taken.
- Small capacity family businesses will be encouraged.
- Measures will be taken to provide an opportunity for the public to take proper and healthy holidays.

The new government elected in 2003 declared in their programme that Turkish tourism will be strengthened and tourism products and services will be diversified (T.B.M.M 2003). The Tourism Minister and the Prime minister stated in a press conference organised solely to introduce 2010 tourism vision of Turkey that the foundation of their 2010 tourism vision is not provision of new enterprises and facilities focused, but environment focused (www.kultur.gov.tr 2004) which signals that new policies will be conscious of environment and sustainability.

Turkish tourism has continued to enjoy progress in the 2000s while some other international destinations faced serious problems. The Turkish tourism industry adopted new diversification

policies to ease excessive pressure on coastal areas and spread tourism activities throughout the country, so that different parts of the country benefit from the positive effect of tourism and the industry utilises its sources all year round. While the development of coastal tourism continues, winter tourism, mountaineering, water sports, golfing, thermal tourism, religious tourism, high plateau (yayla) tourism and other special activity tourism developments were initiated and continue.

In general, when both Turkish and world tourism trends are evaluated, it is seen that Turkish tourism has been affected by all the negative and positive changes on international tourism such as the incidents and unrest in different areas, whether political, economic or social and internal problems and instability. However, Turkish tourism indicates an increasing growth rate. It is believed that it will display even better performance if the necessary measures are taken against seasonal and spatial imbalance in foreign and domestic tourist movements. Despite significant growth in the number of Turkish citizens taking holidays and the amount of domestic tourism expenditures in Turkey, they mostly prefer spending their holidays on coastal resorts which worsen the spatial and seasonal imbalance and they need to be persuaded to visit other regions other than coastal regions to avoid concentration and the problems which it brings along (Table 1.7).

Table 1.7 Number of Turkish Citizens Travelling in Turkey (million)

	Number of Turkish Citizens Travelling in Turkey (million) and expenditures (million USD)									
	1950	1960	197	1980	1993	1997	1998	1999	2000	2004*
Citizens	0.3	0.5	2,7	4,8	9.7	15.9	16.0	18.0	19.5	24.0
Expenditures	60	40	200	40	1200	5000	NA	NA	NA	7200

* 2004 Estimate **http://www.turizmgazetesi.com, ***Tursab, (2002), ****Turkish Ministry of Tourism (1997) *Hane Halki Turizm Arastirmasi*, Ankara

As Aktas (2003) says, the number of senior citizens will be around 18 million in 2020, which is currently around 4.5 million and according to him, active senior citizens who are capable to travel can be attracted to tourism destinations in off-season by practising appropriate pricing policies, marketing and promotion techniques and persuading the companies in the industry that Turkish senior citizens can contribute to the alleviation of seasonality.

Chapter 2

Temporal and Spatial Imbalance in Tourism

2.1. The nature of temporal and spatial imbalance in tourism

Significant shifts have been seen over time in the seasonal preferences of tourists through the history of tourism (Allcock, 1989). Spatial preferences of tourists, in parallel to seasonal preferences, have also changed over time. As Bender and et al (2005) emphasise later, in the 19th century, winter seasons were spent at spas or on the Mediterranean coast. Spas, which were popular and used heavily mainly for health reasons, lost its popularity to seaside resorts in the nineteenth century. Tourism activities have increasingly concentrated in certain areas depending on the characteristics of that particular destination and at certain times of the year. For example, tourism concentrates in coastal resorts mostly in peak summer months and in ski resorts in winter rather than across the destination and throughout the year. Whether it is concentrated in seaside, winter or health resorts, they all have been seasonally and spatially distributed unequally. Murphy (1982) points that the problems of spatial and seasonal imbalance are the two major problems which arisen in tourism management with particular interest to the geographer.

The reasons for these inequalities have shown differences through the years. BarOn (1975) distinguishes these reasons for seasonal imbalance as '*natural*' and '*institutionalised*'. However, these two important reasons may not be enough in certain circumstances to explain the existence, importance and severity of seasonal fluctuations in the tourism industry. In some cases seasonality is caused by agencies involved in tourism planning, development, tourism product production, promotion, marketing, sales and additionally perhaps after sales services. Young (1973) states that the use of spa resorts for health reasons was seasonal and dictated by '*the complementarity of social activities*', such as the cycle of events at court, social life of the capital city, rather than natural influential factors during the heydays of the spas. On the contrary, in the present tourism environment, tourism activities are mostly affected by natural factors such as weather, distance and accessibility as well as institutionalised factors like the schedule of school holidays, festivals and events.

On the other hand, the causal factors for spatial imbalance are usually natural, geographical and supply and marketing driven factors. The natural, geological and geographical characteristics, the difficulty in access to the area, the availability of infra- and supra-structure and the lack of promotion of the area could result in smaller tourist flows in an area than others. Therefore, seasonal and spatial irregularities in tourism are the result of a complex set of institutionalised, natural and other factors such as under- or over utilisation of resources and inadequate marketing and promotion activities.

The study of the phenomenon and of trends will provide important information for the future forecasting, planning, policy-making and indicating their effects on the trends and seasonal and spatial tourism patterns. '*Such information, about seasonal and spatial preferences and characteristics, would be of help in dealing with, and mitigating the effect of, seasonality on tourism businesses and developing different product opportunities for visitors*' (Uysal et al., 1994, p.61).

As Lundtorp (2001) states, there is no scientific concept or theory on tourism seasonality and therefore there is a need for monitoring, reviewing, evaluating and comparing constantly the progress being made in developing a high level of non-seasonal and spatially equally distributed tourism business.

2.2. Seasonality in tourism

Seasonality has affected most forms of human activity throughout the world (BarOn 1975), confronts many industries (Ball 1988) and has pervasive effects on virtually everything associated with it such as planning, development, management and marketing (Brown and Connelly 1986). Tourism in many areas, just like agriculture, has distinct seasons (O'Clery, 1999). According to Williams and Shaw (1991) seasonality is not exclusive to tourism and it is also not typical of all branches of tourism. For example, seasonality of demand for products and services exists in farming, fishing, fashion, commerce, construction, transport, leisure, tourism and many other industries and businesses.

However, businesses in the service industries, such as tourism, transport, hospitality and leisure industries are much more vulnerable to seasonal fluctuations in demand and supply because of the principal characteristics of service products, i.e. intangibility, perishability, heterogeneity and inseparability. As Murphy (1982) says one of the two major problems in tourism management is the problem of seasonal imbalance. Seasonality is usually viewed as a major problem to be faced by the industry (Butler 2000). '*Its adverse macro and micro-economic effects are particularly severe in developing countries, where tourism is essentially an export industry*' (Yacoumis, 1980, p.84) and prevails substantial foreign currency earnings. Seasonality has significant implications for employment and capital investment in tourism industry, and potentially destabilizing effects on other sectors of the tourist-receiving economy (Lim and McAleer, 2001).

Unlike manufacturing industries, service industries are unable to separate production and consumption time and place from each other and store services to serve at other times when the demand is high. Adjustment of supply level to the level of demand is extremely difficult, if not impossible. In other words, most seasonally-sensitive service industries cannot use today's modern production, storage and distribution technology to market their services in different national and international geographical markets in different seasons and make total product demand smooth

across the market place and through the year. As Ball (1988, p.501) stresses, '*in many service industries, demand has to be met virtually immediately or not at all*'.

As Middleton (1988) states at least three further features relevant to travel and tourism services can be added to basic or generic characteristics common to all services which are seasonality, interdependence of tourism products and high fixed cost of operations. Together with perishability in particular, all above characteristics of tourism products make demand variations more acute and most serious problem to tackle with by the industry.

However, demand fluctuations are not only one to blame for causing difficulties and serious problems to the tourism industry. Variations in supply of tourism products have also caused problems. The tourism product itself is such that complex and combination of natural, man-made assets and tourist facilities themselves. Although, it is possible to keep the supply of rest of the elements of tourism products in control, it is impossible to control natural elements such as weather. Bad weather could easily deter the demand for a particular destination even in its usual peak-season period and cause fluctuations in demand and under-utilisation of all combination of tourism resources. Therefore, demand for and supply of tourism products should be considered and evaluated all together in order to see the real roots of the problems facing the tourism industry.

Jefferson and Lickorish. (1991) and the European Travel Commission (ETC) see the seasonality in the tourism industry as an opportunity and a marketing challenge rather than a problem and they stress that it requires greater public and private sector partnership in efforts to spread traffic and avoid congestion in time and destination areas.. They insist that failure to achieve seasonally smooth and dispersed tourism movements is the failure of the destination marketers. Therefore, the problem of seasonality requires special and careful treatment, development and marketing plans, policies and strategies with collaborative efforts by all public and private sectors of the tourism industry and the economy in general. Although it seems idealistic, unrealistic and is not practised widely, all sectors of the industry, managers, tourist authorities, academics and related all sectors of the economy should involve every stages of the decision-making process concerning future tourism plans, strategies and policies although it is not always possible to maintain consensus as all parties would have, or expect, different stakes from the possible future developments in the industry.

Definition of seasonality

The word "seasons" is described in dictionaries as '*the four periods into which a year is divided, because there is different weather in each period. They are called spring, summer, autumn and winter*'. A season is also a period during each year when something usually happens. For instance, the planting season, the football season, the tourism and holiday season. In short, almost all events and activities have a seasonal nature.

Hylleberg. (1992) argues that although the concept of seasonality shares features with many other concepts used in daily language and everyone knows what it is, very few have ever actually thought about an applicable definition. Hylleberg proposes the following definition of seasonality in economics:

> *'Seasonality is the systematic, although not necessarily regular, intra-year movement caused by the changes of the weather, the calendar, and timing of decisions, directly or indirectly through the production and consumption decisions made by the agents of the economy. These decisions are influenced by endowments, the expectations and preferences of the agents and the production techniques available in the economy'* (Hylleberg, 1992, p.4).

However, moving from a general to specific definition of seasonality in the tourism industry, it is very difficult to see any comprehensive definition in the tourism literature. In most studies, authors move directly to the seasonality problem and possible solutions, rather than introducing and defining the seasonality. Seasonality refers to temporal fluctuations (Butler 2000) or unevenness (Bender and et al 2005) in the volume of tourism in a year. Murphy (1985) declares seasonality to be the most common example of short-term cycles with peaks, troughs, and points between these two extremes. It should be stressed that these peaks, troughs and shoulder seasons vary according to location, type and characteristics of the destination. For instance, winter is the peak, spring and autumn are the shoulders and summer is the off-season for most ski resorts. Seasonality refers to movement in a series during a particular period of time which recur year after year (Lundberg et al. 1995) or intra-year fluctuations (Lim and McAleer, 2001). According to Snepenger et al. (1990), the greatest fluctuations in tourism demand are caused by the changes in the seasons, with the annual cycle being termed seasonality of demand (SOD). Butler (1994; 2001) describes the seasonality in tourism as a temporal imbalance in the phenomenon of tourism, which may be measured and felt by fluctuating numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment and admissions to attractions.

In the light of the above definition and the statements, seasonality of tourism could possibly defined as irregular tourism movements and the mismatch of supply and demand in a period of year which may have been caused by several factors such as the natural laws, institutional structure, calendar events, and timing of production and consumption habits and decisions.

Seasonality as a problem

As Jeffrey and Hubbard (1986) state, visitor demands can be highly volatile, in terms of the number, type, destination, length and timing of visits, and fluctuate widely from one year, from one season, and from one day, to the next in the tourism industry'. Therefore, tourism has been characterised by a single main season in many destination regions and in some entire countries, with the hotels and other facilities closed or operating at reduced potential over the remainder of the year. Many tourism jobs are seasonal, which can be a disadvantage for those seeking full-time

work (Kispiox Forest District 2002). The staff working in the tourism industry have very little choice other than finding a job in other industries, even remaining unemployed or moving to another area for the rest of the year, which bring many economic and social problems (BarOn, 1975). However, it should not be disregarded that seasonal and part-time work can be well suited to people who do not want full-time work, such as students, working parents and farmers.

In fact, the problem of seasonality causes trouble not just for the tourism industry and its staff but generates many difficulties at regional, national and international levels. Under- and over-utilization of capacity and resources, congestion, environmental damage, saturation of transport, infrastructural problems, increased risk of road accidents, higher prices, negative impact on the quality of the tourism product (McEniff 1992) as well as unemployment and other related economic and sociological effects were the most common problems which the world tourism industry faces

It was stated in the North Cornwall Tourism Strategy for 2001-2005 that many businesses operate below capacity for long periods of the year and as a consequence many struggle to re-invest, employment is short term and low paid and periods of trading tend to operate in the short term, sometimes to the detriment of the consumer (North Cornwall District Council 2001). These problems are global and, of course, not subject to any particular destination or country. '*Clearly, if there were less seasonality in the tourist sector, a greater output could be provided by using virtually the same quantity of resources during more months of the year*' (Sutcliffe and Sinclair, 1978, p.1).

However, some destinations feel the effects of seasonality more severely than some others because their economies depend heavily on the tourism industry and tourism receipts. Fluctuations in tourism demand which are affected by various factors such as climate, location of destination and motivations of the tourists make these destinations seasonally volatile and sensitive and force them to find solutions to improve seasonal pattern of tourism demand and to use their resources efficiently. As O'Driscoll (1984, p.13) states although '*the problems associated with seasonality are accepted and have been talked about for a long time, remedial action taken is not widespread and therefore action is necessary*'. Management of demand and supply is the main task for tourism authorities and managers. All relevant sectors of the industry should participate in implementing strategic actions if there is to be an improvement in seasonality and regional imbalance throughout the world. It is necessary to provide sufficient services and facilities to meet peak demand in order not to divert potential tourists to other destinations or stay at home. Equally, it is important to consider low off-season demand to avoid over-supply and its negative consequences to the destination and the industry itself.

Despite accepting the adverse affects of seasonal concentration, Saleem (1992) advocates that the de-seasonalisation or spreading tourism activities through the year may lead capacity under-use,

financial loss, threat to valuable ecological and heritage resources by constraining the time which natural resource system desperately needs to recuperate, regenerate or recycle itself, escalation of mass tourism and commercialisation of cultural heritages. Butler (2000, p.521) also supports Saleem's view stating that '*seasonality can be viewed as a beneficial feature in two respects; the first is in the case of environment, the non-tourist season allows for vegetation and wildlife to recover from the demands of tourism use and the second is in the case of residents of destinations, the periods without tourists allow them a 'normal' life for a part of year*'. This perspective was raised by Baum and Lundtorp (2001) who show that seasonality might be a positive element, in that it is an enforced period of recovery for businesses and the local communities.

Seasonality may not or should not be eliminated completely and seasonal nature of the tourism products will probably exist forever. However, it can be eased by taking appropriate measures. Why does seasonality need to be overcome and what measures should be taken to alleviate it? Before answering such questions and trying to find out appropriate resolutions, the characteristics of the tourism product and actual causes of seasonality should be investigated.

Causes of seasonality

In terms of the characteristics of the outcomes, services are distinct from the goods, as mentioned earlier. Therefore, in order to understand the problem properly, it is necessary to review the main characteristics and features of the tourism products served which are the causes of some main seasonal problems. However, few detailed studies have been made of its nature or on all of its effects and problems still exist in identifying the basic causes of seasonality, such as the reasons for its persistence, and its measurements (Bender and et al. 2005).

Characteristics of the tourism products

The unique features of tourism products can be outlined as follows:

1. Intangibility
2. Perishability
3. Heterogeneity
4. Simultaneity of production and consumption (inseparability)
   a. Non-transportability
   b. High degree of producer-consumer interaction (usually short duration)
   c. Production and consumption time and place are determined by the customer
5. Interdependence
6. Difficulty in measuring output
7. High fixed cost structure
8 Labour intensive

The marketing of travel and tourism services is shaped and determined by the nature of the demand, and the operating characteristics of supplying industries. The forms of promotion and distribution used for travel and tourism products also have their own particular characteristics,

which distinguish their use in comparison with other industries. These characteristics form the common ground on which marketing for travel and tourism is based (Middleton 1988), and play key role in formation of seasonal problems as indicated below.

A service cannot be touched; it is also difficult to grasp mentally (Bateson et al. 1978) and this twin intangibility causes a number of problems for marketers (Buttle 1989). Therefore, the intangibility of service product alone leads to several difficulties and questions in the tourism industry. Since tourism products cannot be physically seen, heard or touched, in short as they do not exist in normal physical form, customers cannot see and judge the quality of services before using and experiencing them. In addition to all these characteristics, it is very difficult for producers of services to measure and know how much the customers are satisfied and happy to continue consumption. At this stage, difficulty occurs in demonstrating such intangible service products, judging its performance in the market places and deciding whether the product should be developed, improved and replaced.

In seasonality terms, it is very hard to persuade the customers that the tourism industry offers the same products at a same destination all-year-round with a different background, i.e. weather, and new tourism products and services in off-season are not easy to test because customers cannot easily realise, perceive or understand the degree of quality and advantages of services provided in different times of the year as they experienced the products at other times of the year in the past. They may also not evaluate the service products easily as a result of risk factor which they have to take. Thus, tourism products require a more careful and effective marketing and promotion in order to alleviate the questions and uncertainties in the customers mind and consequently to prevent sudden and continues fluctuations in demand.

Unlike other industries, tourism imports the market to the product, rather than export the product out of region to distant markets (Kispiox Forest District 2002). For many services, production and consumption occur at the same time and they cannot be transported or transferred. Customers need to come to the producers in order to experience the service products. There is a high-degree producer-consumer interaction in the production of services, which is '*a mixed blessing; on the one hand consumers are a source of productive capacity, but on the other hand the consumers' role create uncertainty about the process's time, the product's quality and the facilities' accommodation of the consumers' needs*' (Sasser and et al, 1978, p.301).

Involvement of customer in the production of the services and determination of production place and time, unique features and quality of services leave the destiny of tourism industry into the customers' hands. Travellers choose wherever and whenever they go and what kind of services and facilities they will consume and then the tourism and hospitality industry serve its products when and where the demand is. When there is no demand or low demand seasonal problems occur in the industry regardless of the quality and the nature of products.

Armistead et al. (1985, p.7) states that *'another operational consequence of the consumer being involved in the production process is that a service cannot be stored for the future consumption in the same way as manufactured products'*. Therefore, services are perishable, in other words, non-stockable. If there are unsold rooms in a hotel on a particular day, then the hotel has lost income. For example, if a hotel has bed capacity for 500 guests overnight and only can achieve sales of 300, remainder bed capacity for 200 people and revenue from this unused capacity is lost forever as it is not stockable and useable at any other times. *'The critical marketing problem, here, is how to manage demand so that it is experienced at the times and in the quantities wanted'* (Buttle, 1989, p.237).

In this respect, the tourism industry is helpless to tailor demand to the supply or supply to the demand immediately if there is over and under capacity demand. *'Not only service marketers, managers of demand, they may also need to manage supply so that a profitable equilibrium is always obtained'* (Buttle 1989, p.237) which is not an easy task. So, the tourism industry needs very carefully stated marketing plans and strategies in order to make sure that the industry operates smoothly at a full capacity throughout the year.

Services are heterogeneous. *'Taken literally, heterogeneity means that every service performance is unique to each customer and service producer'* (Middleton, 1988, p.27). Since every individual person has his/her own personality, characteristics and expectations, they all behave and react differently while they are either serving as producers or consuming as customers. Each service product is characterised by each customer's expectations, motivations and desires, and by behaviour and attitude of the producer. As Schmoll (1977) explains, the subjective and objective reasons, expectations and desires which underline tourists' choices for certain destinations, arrangement types, service categories and vacation activities are far less evident - and very often two people make exactly the same choices for entirely different and sometimes even mutually exclusive reasons. In the same way every individual member of the tourism industry, receptionists, waiters, tour guides etc., serve differently to each customer and respond to problems in a different manner each time. Therefore, the tourism industry has to deal with its workforce's performance as part of the service process as well as consumer demand.

Targett (1989, p.291) states that *'labour is likely to be the most important source and this importance is increased because of consumer/employee contact in the delivery of the service'*. Although, there are some exceptions, the most jobs in the labour intensive service industries cannot be done by machines and there is a limited possibility of automation in the industry because service products are intangible and consumer actually experiences the service product during the production and consumption which both take place at the same time, simultaneously. Although, some branches of the service industries, such as a telephone company which have limited contact with the customer, have more opportunities to replace employees with the machines in order to reduce costs, most service industries, especially the tourism industry, have to deal with their

customer face-to-face and therefore, they have very limited access to utilize modern technology. Even if the full automation is possible for some jobs, tourists prefer being served by a human being.

In the tourism industry, high labour turnover is seen mainly because of the special characteristics of the industry, seasonal temporary employment, financial reasons, low salary and poor management. On the one hand, managers of the tourism industry have to deal with selecting, organising, commanding, controlling and motivating the staff as a part of the service industries, on the other hand, they also have to pay attention to personnel cost which, as Schmoll (1977) says, must be considered as fixed in the short-run just as capital costs in the long-term because personnel are the most expensive and not replaceable easily during the production of services.

Apart from the above common characteristics of service industries and its products, there are also some characteristics especially peculiar to the tourism industry and tourism products which make the industry more fragile against seasonal problems. Interdependence of the products, high-fixed cost structure, the role of the government and official organisations and seasonally fluctuating demand with inelastic supply are the most important other features related to the tourism industry and cause several problems at both micro- and macro level in terms of management of the resources effectively.

First, the tourism product is a combination of several products. '*In a narrow sense, the tourist product consists of what the tourists buy. In a wider sense, the tourist product is an amalgam of what he does at the destination and of the services he uses to make it possible. Therefore, each destination has particular product or products to offer*' (Burkart and Medlik, 1981, p.48). Transportation, accommodation, catering, attractions and many other related tangible and intangible products, facilities and attractions are all essential integral parts of the tourism product since they all act to meet the needs of travellers and they all depend each other. For example, as McIntosh and Goeldner (1972) say, the success of a Colorado ski resort depends on transportation to bring skiers to the slopes, housing to accommodate them, restaurants to feed them, and other services (medical facilities, après, ski lounges and retail shops to take care of. As it happens in a human body, if something goes wrong in any component of the tourism industry at any time, it affects the whole industry and the customers, tourists. Therefore, they are all required to be co-operative and communicative to each other in order to form a more united, firm, healthy and successful tourism industry.

However, consumers of the industry do not necessarily have to purchase all the services at the same time. The tourist may buy a seat from an airline company but may not have lunch or dinner at a restaurant at the destination. He/she is completely free to choose any combination of tourist services to purchase, unlike the goods which are produced and sold in one piece. As Schmoll (1977) points out, tourist services are produced and very often sold on an incremental basis: a

transport enterprise provides transport to a destination, a hotel supplies accommodation and food, a local bus company sightseeing tour etc. He concludes that from the tourists' point of view, it is highly unsatisfactory and complicated to deal with a variety of different suppliers to satisfy their needs. As indicated, fragmented and interdependent feature of the tourism products can and do cause several difficulties in practise for the industry as well as for the tourists during the whole production and consumption process. However, it should not be disregarded that despite the above difficulties, an increasing growth trend has been seen in independent travels.

On the other hand, tourism products are mostly produced at a high fixed cost and relatively low variable costs. '*It is clear that, in most cases, a substantial proportion of costs may be regarded as fixed or semi-fixed, which must be incurred regardless of the volume of sales*' (Hughes, 1986, p.104). Therefore, the profitability of the industry is very sensitive to changes in volume of the business. When sales rise, fixed costs for per unit decrease and eventually profit from per unit increase. On the other hand, if sales decline, because fixed costs will remain same, cost for per unit service increase, profit decreases.

Tourism enterprises has to operate as close as to the full capacity which depends on funding, business and marketing plans in order to be efficient and profitable. They also must have a very carefully structured pricing policy to meet the costs when they are operating at very low capacity. Otherwise, losses will be inevitable for the industry. At a macro-economic scale, very high cost infra- and supra-structure investments, invaluable natural and man-made tourism resources put pressure on the destination country to avoid from wastage and under-utilization of the assets through the year because many problems stem from fluctuating demand, underutilization of resources on a time basis and therefore high fixed costs.

When all the above characteristics are summarized, it is seen that supply of tourism products is rigid and inelastic, and therefore, it causes several problems in the industry and it makes fluctuations in tourism demand harmful and too costly to the tourism industry. If demand is inadequate or over-estimated, the industry will find itself in a large complication because consumer demand cannot be raised easily and obviously its receipts from tourists will decline. In contrast, if demand is over-capacity or under-estimated, then potential customers will be lost and this will probably damage the reputation and image of the industry and the destination. In addition, reducing the number of staff and using the premises for other purposes when there is low or no demand for the services are not possible. Thus, the inelasticity of supply, instability and elasticity of demand are altogether the major problems of the tourism industry to tackle with.

Characteristics and determinants of tourism demand

The demand for tourism is the principal pillar of the international tourism system and everything else revolves around this dynamic element (Culpan 1987). Tourism demand is buoyant and

dynamic (Laws 1991) and one of the more complex aspects of tourism (Pearce 1991). Gunn (1988), Mill and Morrison (1985), Murphy (1985) and various other references describe demand and supply as the main components of the tourism market and the tourism system. Thus, demand, in terms of economics, forms one half of the tourism industry and without any of these components, no tourism activities, tourism industry and market place in which tourist goods and services are to be exchanged take place.

In economic terms, demand is defined by McConnell and Brue (1960) as a schedule which shows the various amounts of a product which consumers are willing and able to purchase at each specific price in a series of possible prices during some specified period of time.

From the marketing and management point of view, Kotler (1994, p.7) makes some clarification between needs, wants and demands. According to him;

> '*a human need is state of felt deprivation of soma basic satisfaction and needs exist in the very texture of human biology and the human condition. Wants are desires for specific satisfiers of these deeper needs. Although people's needs are few, their wants are many and they are continually shaped and reshaped by social forces and institutions, such as churches, schools, families and business corporations.*
>
> *Demands are wants for specific products that are backed by an ability and willingness to buy them. Wants become demands when supported by purchasing power. Companies must therefore measure not only how many people want their product but, more important, how many would actually be willing and able to buy it. Marketers influence demand by making the product appropriate, attractive, affordable, and easily available to target consumers*'.

From the tourism point of view, McIntosh and Goeldner (1972) adopt economists' definition of demand to tourism demand without mentioning about the consumers willingness and the ability to buy products and define it as the quantity of tourism goods and services that will be purchased at a given price and within a given time period.

On the other hand, geographers like Boniface and Cooper (1987) and Mathieson and Wall (1982) define tourism demand as;

> '*the total number of persons who travel, or wish to travel to use tourist facilities at places away from their places of work and residence*'.

None of above tourism demand definitions mentions about the willingness and purchase power. As Kotler (1994) emphasises above, tourism establishments must measure not only how many people want to purchase their tourism products but also how many people would actually be willing and able to buy them. When the supply of tourism product is tailored by considering the number of persons who wants to use tourist facilities, then there will be over supply as some people's wants cannot be backed up by an ability and willingness to buy the tourism products. That is why

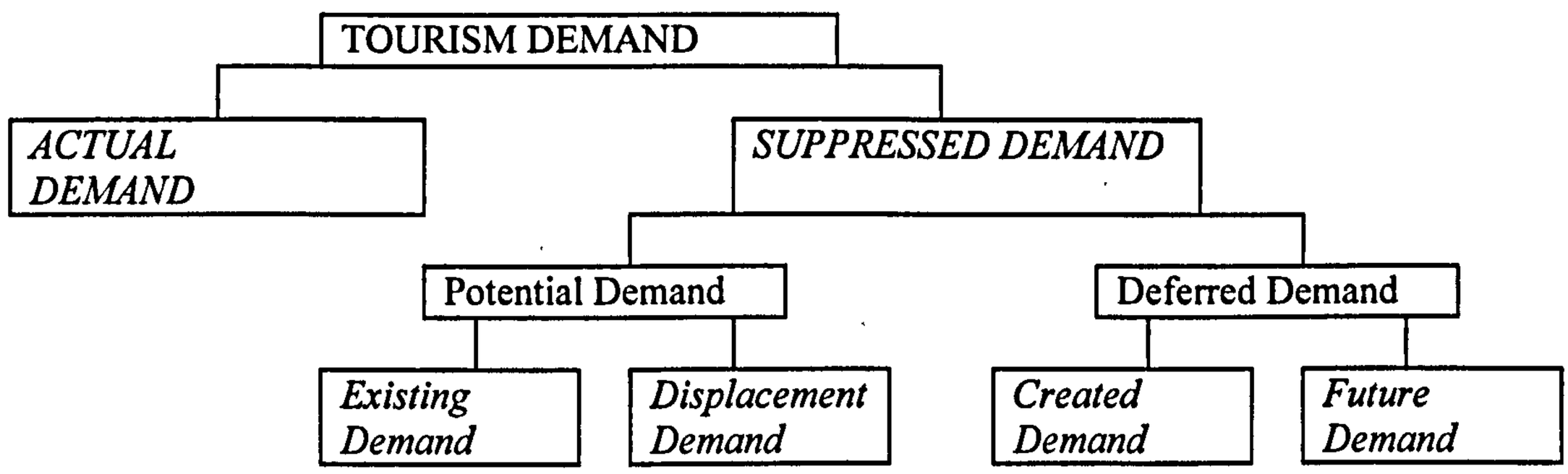
mismatch of demand and supply, and fluctuations in demand in time and place become major problems of the tourism industry.

As a consequence, the comprehensive tourism demand may probably be defined in the light of the above definitions from different points of view as;

> *'both the number of people who purchase or wish to purchase tourism products, and the amount of tourism products and facilities which those people are willing and able to buy at each specified price, at a particular place away from their places of work and residence, and within a given time period'.*

Similar definition is also used to define the "market" by Schmoll (1977). Consideration of overall perceived could not be enough to estimate the supply capacity which can cause over supply. Therefore, tourism managers should consider suppressed, potential and deferred demand as well as actual demand to calculate the real capacity demanded now and could be demanded in the future.

Figure 2.1 Components of Tourism Demand



*Adopted from Boniface and Cooper (1987), Holloway and Plant (1992) and Mathieson and Wall (1982)

Demand for tourism products consists of a number of components (Boniface and Cooper 1987). While Mathieson and Wall (1982) classify the components of tourism demand as actual, potential and deferred demand, Boniface and Cooper (1987) take potential and deferred demand as two elements of the suppressed demand which is called by Smith (1989) as unmet demand or latent demand. Holloway and Plant (1992) group the tourism demand as existing, displacement, created and future demand what they call them as four distinct kinds of demand. Clearly, almost all references agree on the components of tourism demand but each one takes and evaluates it from different angles and in different depth.

Actual or effective demand is used to refer to actual number of people who currently use the tourism services and facilities, and the sum total of actual consumption of tourism goods and services at a destination. According to Bull (1991), buyers in this case tourists, must possess the

wherewithal to buy as well as willingness if there is to be effective demand. However, it does not necessarily mean that every person who is willing and economically able to buy the tourism product actually buys the product. They may have the necessary conditions for purchasing but some factors such as family structure, working conditions and calendar may prevent them to actually buy and use the services. Therefore, as Collier (1989) states actual demand represents the sum total of persons who actually travel or engage in tourism related activities.

Mathieson and Wall (1982) and Boniface and Cooper (1987) claim that suppressed demand is made up of potential and deferred demand which both represents the people who do not travel or use the tourist services and facilities for some reason. According to Smith (1989), latent demand or suppressed demand is a measure of the difference between potential level of consumption and the observed level and the difference may be due to shortage of supply, excessively high prices, scheduling problems or other barriers. Indeed, although the tourism industry is claimed to be the biggest industry in the world, tourism expenses have no place in budgets of most people who live, especially, in undeveloped and newly developing countries even they have desired to travel.

Collier (1989) defines the people who fulfil the requirements of travel and tourism, for example those who are able to travel or engage in tourism related activities as the potential customers. However, although potential travellers may fulfil the requirements, they actually do not participate in tourism activities for some reason at present circumstances. Potential customers may not be travelling because of inadequate supply of the services they want, which is named by Holloway and Plant (1992) as existing demand. Consumers wait until the right product for them is supplied and available in the market place. On the other hand, they define the other part of potential demand, displacement demand as the demand resulting from the dissatisfaction experienced by current customers. These customers search for a product which really will satisfy them. Finally, people who are motivated and fulfil the requirements, perhaps travelled before but they do not travel now because of personal reasons such as financial problems and time constraints, also described as potential customers since they are expected to travel if some changes and improvements take place in their circumstances. All these components of the potential demand can be converted into actual demand which becomes much crucial for off-season tourism development, improvement of seasonality and uneven distribution of tourism activities and tourists between regions.

The second element of the suppressed demand is deferred demand which includes those people who could travel, if motivated, but they do not do so because they either lack of knowledge of opportunities, facilities or both (Mathieson and Wall 1982). Here, advertising, marketing, promotion and public relations play important role to inform and make people aware of the tourism products and opportunities. Otherwise, most of the likely potential customers will remain forming the deferred demand. Some unrecognised and latent wants and desires can be awakened, developed and promoted by using effective marketing techniques. This type of demand is called by Holloway

and Plant (1992) as created demand. Mill and Morrison (1985) explain the interaction between buying and communications processes at seven stages as seen on (Figure 2.2).

Figure 2.2 Interaction between buying and communications processes

Buying Process	*Communication Objective*	*Communication measurement*
Awareness/Attention	Exposure	Number of readers/viewers exposed to message
Knowledge/Comprehension	Transmission of information	Percentage of readers/viewers who remembered essential parts of the message
Attitudes/Interest/Liking	Attitude change	Attitude surveys before and after message to determine degree of change
Evaluation/Preference/Desire	Creation of preferences	Preference surveys before and after message to determine preference
Intention/Conviction	Initiation of action	Number of actions taken (e.g., travel agent contact, tours booked, responses received) in response to a particular message
Purchase/Trial/Action	Purchase	Number of bookings made, etc.
Adoption	Repeat purchase	Percentage of visitors who are repeat purchasers

Moreover, there will always be deferred demand for the tourism products as the population, demographic, social and economic and other changes take place continuously through the time and this type of demand represents the future demand. Future demand is not in existence, even in potential or deferred form, and will naturally exist and arise in the future either as suppressed demand or actual demand.

As has been noted, ordinary people pass through several stages to become a first suppressed and then actual customer and finally consume the tourism product. From the industry's point of view, it is a rather long process and must be handled with care in order to keep development of tourism demand steady and balanced, and secure the industry's future. When this long process assesses carefully and patiently, it will lead the tourism industry, more prosperous future when distribution of tourism activities, tourism demand and supply in time and space is even and justified.

Tourism demand is influenced by a variety of variables and while some of these variables cannot be in control of neither suppliers nor consumers, some other variables can be influenced and changed by both parties. The success of any geographical unit as a destination is primarily determined by several factor which are namely attractions, amenities, accessibility, images and price (CHO, 2000). The literature on tourism demand and demand in general mention about more or less same factors which determines the tourism demand. They can be outlined as follows Schmoll (1977), Hudman (1980), Jefferson and Lickorish (1988), Middleton (1988), Olali (1984b), Kotler (1994), Tribe (1995):

- Economic factors: Inflation rates, Exchange rates, Price, Fiscal regulations, Living standards and disposable income
- Demographic factors: Household size and composition, Age and life-cycle stage, Education level, Occupation
- Geographic factors: Climate, Accessibility, Size and structure of the population,

- Socio-cultural factors: Social and cultural proximity
- Comparative prices and quality
- Mobility
- Government and regulatory factors: Political stability, Security, Incentives
- Media communications: Advertising
- Personal factors: Lifestyle, Economic circumstances, Personality and self-concept
- Fashion and tastes
- Leisure needs

The determinants of tourism demand have shown rapid change in parallel to the new developments and improvements in human being's living and working conditions. Although, most of the above determinants of tourism demand are common to most tourist generating countries, some generating countries may have additional specific determinants peculiar to these countries. The world tourism flow statistics indicate that people of countries where is developed, industrialised and living standard is relatively high participate in tourism activities more than the people of undeveloped and developing countries.

However, as Burkart and Medlik (1981) and Middleton (1988) states, the other factor which determines the demand for tourism is provision or supply of tourist products and services. For example, demand for a destination can not be developed and realised until the basic transportation, accommodation and food and beverage services are made available at that destination. Therefore, when suppliers and marketers of tourism making decisions on product development, promotion and marketing of existing products, they should consider the determinants of demand in each market and determine individual marketing strategies for each generating country.

Natural Factors

Natural seasonality is usually associated with climate and seasons of the year at a particular destination (Lim and McAleer, 2001). The climatic features and weather conditions in both tourist receiving and tourist originating countries affects seasonal fluctuations in tourism supply and demand. Much of the traditional temporal patterns of tourists reflect seasons in the Northern Hemisphere, because most of the world's tourism originates in the developed countries and are located there (Butler 2000). While poor climate and weather conditions in receiving countries at certain times of the year deters tourists from visiting these destinations, the unusual weather conditions and seasonal characteristic peculiar to tourist originating countries push tourists to destination countries where weather and climate is better. These both situations have caused seasonal concentration at certain times and dead seasons in the remaining time of the year. As Stynes and Pigozzi (1983) put it seasonal fluctuations are shown usually as the result of climatic conditions of the destination countries or areas, but the climate and weather conditions in generating countries is also to be blamed for seasonal imbalance. As Allcock (1989) states, touristic travel activities are bound to specific climatic seasons of the year even though they may exhibit 'seasonal' variation in their distribution. For example, visitors who want to ski have to visit ski

resorts only during winter months when the weather is snowy and surface is ready for skiing, while visitors who want to swim in the sea and have sunbath should visit coastal areas when the sea and air temperatures are high enough, usually spring and summer.

Sometimes, countries experience natural disasters and catastrophes such as earthquakes, floods, avalanches and droughts. When these types of disasters take place in a destination, they can easily deter people to visit this area and cause temporary seasonal fluctuation in that year. As usually the effects of these types of natural disasters are temporary and the destination will return to usual daily life after a period of recovery time, the demand for tourism in that region expected to return its original or normal trend.

Institutional Factors

Institutional form of seasonality in tourism is caused by human decisions and relates to what were often traditional temporal variations in the patterns of human activity and inactivity and varies much more widely across the world than the natural form, reflecting the cultural diversity and beliefs (Butler 2000). It is the result of religious, cultural, ethnic, social factors and school vacations (Lim and McAleer, 2001). According to Lickorish (1969) the timing of school terms are recognised as perhaps the greatest single force in restricting freedom of choice. The summer season is usually the time for main school holidays and annual vacation all over the world. Individual members of the family see the summer season as an opportunity to get together (Olali 1984b) and spend enjoyable time. For this reason, parents take their annual paid vacations within the school holiday period which is usually the summer season. Although, there is at least one or sometimes more semester holidays in a year, the summer holiday is preferred as it is the longest holiday, when the weather is better and good weather provides an opportunity for relatively easy travel and enjoyable experiences. The fact that number of climatic, psychological, economic and other conditions are more favourable in summer (Markovic 1969). In this respect, timing of school holidays encourages the working force to take their annual vacation in the same period of time. As Kyriakos (1969) states the question of school holidays is a leading and very important determining factor in the overcrowding in the peak summer period. However, Kennedy and Deegan (2001) states that those European countries that the greatest seasonal spreading of domestic tourism are the same countries who have initiated either staggered school or work holidays which indicates the great importance of timing of school and work holidays.

Holiday movement is still centred on public holidays which in most developed countries are based on religious and national festivals (Lickorish (1969). Bank holidays, national independence days, national festivals, Christmas and Easter period in Christianity and Ramadan and sacrifice festivals, pilgrimages to holy places can be considered as main events determining the period of peak demand in most domestic and international destinations. The prices declines to its lowest levels due to airline and transport, tour operator, travel agency and accommodation sector competition in peak

seasons. Therefore more people get the opportunity to travel. Because of high demand and high occupancy rates, the cost for per travellers decline and producers hold the opportunity to offer even much lower prices. Therefore declining holiday and travel costs encourages people to travel at peak seasons which cause concentration and several negative results at destinations.

The human factor

The reasons for current patterns of seasonality have been little explored and may well relate more to the motivations and behavioural attributes of tourists than to innate climate or historical characteristics in destination areas (Butler 2000). Psychological factors: Some people may have phobia against cold, winter, snow, hot weather etc. Some people may have prejudice against the people of countries or political regime of the country and therefore they stay away from that country although they want to see the natural and man-made attractions in those countries.

Health factors: Some people have some specific illness against sunshine, cold weather etc. In addition, the long distance can prevent some people to travel. Particularly, disabled travellers experience major difficulties in travelling. Some other people cannot travel because their health is affected by the journey conditions. For example, some people cannot travel by an air plane as their ear and hearing ability is severely affected by air pressure and therefore they have little chance to visit overseas and long distance destinations.

2.3. Spatial imbalance in tourism

Tourism supply and demand varies from one region to another, as well as from one season to another, in many destination countries. It has long been one of the most serious problems facing the tourism industry. However, imbalanced distribution of tourism has increased with the emergence and development of mass tourism, which, as Shaw and Williams (1994) say, tends to be highly spatially polarised. In many developing countries, the main priority is to develop tourism without considering the seasonal and spatial imbalances the destination may face in the future. Rapid development in many tourism destinations, where tourism is a relatively recent phenomenon, has caused more problems than expected benefits. '*Economic objectives often have been pursued to the neglect of their social and environmental ramifications so that the form of tourism that is developed is less beneficial*' (Heath and Wall, 1992, p.5).

> '*The matching of supply and demand in recreation and tourism is a time and spatial problem. Activities are characterised by extremes of seasonality and periodicity on the one hand, and by extremes of geographical concentration on the other hand. In planning for recreation and tourism, solutions have to be sought in these two directions, if adequate provision is to exist for all reasonable demand, to provide satisfaction for the tourist, and to safeguard the rural and urban environment*' (Burkart and Medlik 1981, p.245).

Although there are essential, diversified and adequate resources and attractions throughout the destination countries for balanced tourism development, concentration of tourism supply and demand in particular regions has caused pressure and destruction of tourism resources in those regions and an uneven distribution of benefits between regions and people. The development in many successful economies marked by spatial imbalance, facing problems of congestion, while a number of regions suffer from under-utilisation of their potential and resources (Irish Government 2002). Insights into the complex spatial behaviour of visitors and spatial variations in tourism supply are essential in the successful development and monitoring of tourism projects. In most cases, seasonality and spatial concentration in tourism are directly related to each other and they require combined efforts in planning, policy - making, promotion and marketing of tourism resources.

Causal factors for spatial imbalance

The main components of the tourism industry are outlined as attractions (natural and man-made), transport (land, air, rail, sea), accommodation (hotels, holiday villages, B&Bs etc.), facilities (restaurants, shops, banks, post office etc.) and infrastructure (electricity, water, health care, security etc) (Pearce, 1991), (Rogers and Slinn, 1993), (Cooper et al. 1993), (Burkart and Medlik 1981), (Murphy 1985), (Barutcugil 1984). Rogers and Slinn (1993) have added hospitality to above components. A destination must sell its own unique product in the market place in order to be successful. Having natural or man-made resources mean nothing if they are not accessible and accommodation and other services are not available for visitors. According to Hudmann (1980) two characteristics are common to areas with a viable, healthy tourist industry; first is accessibility and second is the availability of basic amenities at or in the area of the attraction.

Several factors have been shown as the main causal factors for spatial imbalance and while some of these factors are not controllable or difficult to be controlled, some others can be controlled and manipulated. On the other hand, while some spatial imbalance problems are caused by the supply side, the motivation and the choice of visitors cause concentration of tourism in particular areas. For example, as Williams and Shaw (1991) emphasise that the supply of accommodation is both determined by, and helps to determine, demand. In other words, both supply- and demand-side of tourism are responsible for uneven spatial imbalance in distribution of tourism activities and benefits throughout the destination. There are several measures to be taken in order to minimise the negative effects of these causal factors which limit benefiting from the resources available in less-developed areas and damage the resources in concentration areas. Identification of the causal factors for spatial imbalance is accepted as the first step for solving or at least improving spatial imbalance and distribution of tourism activities and benefits of tourism throughout the country.

Every town, city, region or country has its own unique geographical, physical, natural, social, cultural, economical characteristics. In addition, all may have different infra-structural and supra-

structural facilities and development. Therefore, each destination has particular product or products to offer. While some destinations can be rich in terms of natural resources such as mountains, scenery, lakes, national parks, wildlife, some others can have limited natural resources but can be rather rich in terms of man-made attractions such as amusement parks, museums, theatres, archaeological sites, shopping centres and cultural events. On the other hand, it is possible for some areas that they can be rich in terms of both natural and man-made resources and attractions, and some others unlucky and poor in terms of both. As consequence, availability and quality of either natural or man-made tourism resources for the first step for the development of tourism in an area and if a region has lack of natural and man-made resources, there will be no or slack demand for that area. Consequently, spatial imbalance unavoidably will occur between regions.

The demand for tourism to a particular destination may be a function of push factors in the region which can be regarded as a person's predispositions to tourism which is determined by the socio-demographic and psychographic characteristics, and pull factors in destination areas which relate to the relative attractiveness of destinations (CHO 2000). As Gunn (1994) states, if the market provides "push" of traveller movement, attractions provide the major "pull" and without attractions, other services may not be needed except for local trade. Although Hudmann (1980) accepts that a combination of attractions is helpful in creating a strong tourist appeal, he emphasises two important points which may cause spatial imbalance;

- the needs and tastes of tourists vary considerable and an attraction may have strong appeal to a relatively limited group
- the tourism industry is susceptible to change and today's key attraction may not be considered worth a second look in the future

As stated above, accessibility is a quite important component of the tourism industry and it is also an important factor to convince potential visitors to visit a destination by easy and trouble-free access to the resources and attractions.

The other primary causes of spatial imbalance are climate and weather conditions, level of facility provision for tourism and private sector interests, safety, inadequate promotion and marketing and tourist market selection, national development and tourism policies, local people's perception of tourism.

2.4. Effects of disparity in tourism and development options for improved tourism

The common feature of both seasonal and spatial disparities in tourism is the under- or over-utilisation (concentration) of natural and man-made resources which can occur either in time and space. The concentrated use of resources in time leads to seasonality and in space initiates spatial inequalities. Whether the existence of these inequalities is beneficial or detrimental depends on the viewpoint of different agencies involved in the tourism industry and regional development. The report prepared by Parliamentary Commissioner for the Environment (1997) shows that there is a very wide range of effects associated with tourism, caused by many different kinds of activities in a

wide range of environments and while some of the effects, such as trampling of vegetation, are limited in scope to specific, often more sensitive sites, others, such as air pollution and effects on revenue and investment, are generally more dispersed, and hence more widely felt.

Spatial and seasonal tourism development has various conflicting positive and negative effects on the destination country or region such as positive economic impact on the local economy and negative environmental impact. Disparity in tourism development, in other words concentration of tourism in certain regions, has a two-sided effect on almost every development perspective. The concentration of tourism in a popular region not only provides economic benefit but also negative social and environmental impacts. On the other hand, a less popular region remains protected environmentally and socially but economically disadvantaged in comparison with the developed tourism regions (Figure 2.3).

Figure 2.3 Impact assessment of disparity in Turkish tourism

Type of Impact	Spatial Impact				Seasonal Impact			
Developed, Less Developed Regions	Developed		Less Developed		Developed		Less Developed	
Under-utilization of natural, man-made tourism resources / attractions	+	-	+	-	+	-		-
Over-utilization of natural, man-made tourism resources / attractions	+	-			+	-		
Degree of investment in superstructure and infrastructure (Private and public)	+			-	+			-
Regional growth	+			-	+			-
Employment	+	-		-	+	-	+	-
Contribution to living standards of local community	+			-	+			-
Seasonal/permanent migration to other regions	=		+	-	+	-	+	-
Social & Cultural conflicts and issues		-				-		
Benefits of social interaction and cultural exchange	+		=		+		=	
Environmental issues (Pollution, pressure, destruction etc.)		-	+			-	+	
Provision of additional services and facilities	+		=		+		=	
Emergence of health and disease issues and concerns	-		=		-		=	
+ Positive impact - Negative impact = No change								

The negative and positive effects of imbalanced tourism development and movements are formed by various advantages as well as disadvantages within these effects. For example, as indicated in the list below, while under-utilisation of all potential and available tourism resources in all regions creates negative economic impacts, it provides an opportunity to the natural environment to recover in concentrated tourism regions and preserve itself in other less- or undeveloped regions, in contrast, as it creates opposite effect in less- or undeveloped regions.

The advantages and disadvantages of tourism in the destination regions indicate tourism authorities and developers have a major task to decide whether developing tourism is beneficial for the development and growth of country or region or disrupts and destroys the scarce resources slowly.

According to Williams and Shaw (1988) this is an issue for industrialised countries as well as developing countries and their societies. WTO (1994) claims that the primary reason for developing tourism in most countries and region is for economic benefits, although there are often other reasons, as well. Whatever the primary reason or reasons are, the primary objective must be keeping the development and its potential benefits high and disadvantages as low as possible by balanced development policy and strategies. '*Tourism creates both positive and negative effects in the destination country and region. Thoughtful policy-making and planning can do much to minimize or even remove negative effects*' (Archer and Cooper, 1999, p.79).

Figure 2.4 Advantages and disadvantages of tourism on the regions

☑ Advantages ☒ Disadvantages

Over- (in peak season) **and Under-utilisation** (in off-season) **of;**

***available and potential tourism resources in* developed regions**

- ☒ ☑ Attractions and activities
  (Natural, cultural, historic, theme parks, zoos and other man-made amenities)
- ☒ Accommodation
  (Hotel, motel, holiday village, boarding house, self-catering apartments...)
- ☒ Tour operation services
  (Travel, sightseeing tours, excursions, incoming services, ticketing...)
- ☒ Transport
  (Railway, road, water and air transport facilities)
- ☒ Infrastructure
  (Water, electric, sewerage, waste disposal, cleaning, telecommunications...)
- ☒ Institutional services
  (Tourism information offices ...)
- ☑ ***Under-utilisation in off-season gives*** polluted, damaged and pressured natural, man-made and social environment a breathing space and recovery time by next season.

Under-utilisation of;

***available and potential tourism resources in* less- and undeveloped regions *in* all-year round**

- ☒ All potentially available natural and man-made resources
- ☒ All facilities, services, infra- and superstructure investments

Employment opportunities

in developed regions

- ☑ High level infra- and super-structure investment
- ☑ Number of seasonal and permanent jobs available to local community
- ☑ High employment level sustains the local economy and increase living standards
- ☒ A degree of unemployment as some jobs are taken by seasonal and permanent immigrant workers

in less- and undeveloped regions

- ☒ Low level infra- and super-structure investment
- ☒ High unemployment and stagnant local economy lower living standards
- ☒ High migration rate to other regions to find job and live there
- ☑ Money transfers from place of work to home region

Social & Cultural impacts

in developed regions

- ☒ 'Host culture debasement
- ☒ Unacceptable rate and scale of cultural conflict and change
- ☒ Rich visitors creates tension in poor communities
- ☒ Pressures to change social values, dress, mores, habits and behavioural norms
- ☒ Damage to cultural systems and to cultural resources. Minority languages at risk
- ☒ Cultural commercialisation and commodification of society
- ☒ Introduction or expansion of
  - gambling - prostitution - drunkenness
  - other excesses - vice and drugs - theft and petty crime...
- ☑ Increased knowledge of host culture by visitors
- ☑ Opened community to outside world
- ☑ Increased social contacts, new ideas and values, new way of life
- ☑ Encouragement of heritage protection, interpretation and management
- ☑ Cultural interchange, peace and understanding' Travis (1982)

in less- and undeveloped regions

- ☒ Absence of above social and cultural benefits of tourism
- ☑ Protection and improvement of social and cultural values against detrimental effects of tourism mentioned above

Environmental issues

in developed regions

- ☒ Pollution (air, water, land, visual, noise...)
- ☒ Congestion
- ☒ Heavy use of and pressure on natural environment and archaeological and historic sites
- ☒ Destruction and disruption of environment (Facility development, second homes)
- ☑ Protection and improvement of environment as a result of demand from visitors

in less- and undeveloped regions

- ☑ Preservation of natural environment and other sensitive natural and man-made resources such as heritage sites

Provision of additional services and facilities in the region

in developed regions

- ☑ Which would not exist without tourism in the region such as more shopping and entertainment facilities, parks, health, cleaning and postal services...

in less- and undeveloped regions

- ☒ Less facility and service provision

Health and disease issues and concerns

in developed regions

- ☒ As a result of close contact between host community and visitor, carrying diseases from origin country to destination carrying diseases from destination country to origin
- ☑ Awareness of health hazards and provision of health services for prevention of possible disease spread

in less- and undeveloped regions

- ☒ Relatively safe from spread of disease introduced by visitors
- ☒ Relatively poor health and sanitary conditions as a result of economic poverty

- ☒ Easy for travellers to catch a disease or get sick
- ☒ Inadequate health services

2.5. Solutions for improved imbalance

Undoubtedly, improving seasonal imbalance would provide several benefits to destinations, its people directly and indirectly involved in tourism activities and visitors to those areas. BarOn (1975, p.51) outlines the main benefits of evenly-spread seasonality in four main headings:

1- *More enjoyable holidays for larger number of people, without the overcrowding so common in the peak season*
2- *Optimal utilization of tourism facilities which includes supra-structure such as accommodation and entertainment facilities and infra-structure including water, electricity and transport facilities. Optimum usage of facilities will also prevent construction of new facilities to meet high season demand which will bring several benefits including environmental and economical advantages.*
3- *More even employment in tourism and related industries, high service quality and continuous and reliable career opportunity*
4- *Reduced average prices and improved profitability*

Seasonal variation in demand is a reality for most tourism destinations and to challenge or to work within its constraints is a destination management issue that faces tourism planners throughout the world (Baum and Lundtorp 2001). For these reasons, officials, managers and academics of the tourism industry proposed several ways to prevent seasonal concentration and develop year-round tourism. However, it is not easy to solve seasonal imbalance and it requires very serious measures work and co-operation to put these proposed methods into practise.

Kennedy and Deegan (2001) states that an examination of policies EU countries to tackle seasonality shows that a lack of planning and insufficient co-ordination at government level were the main deterrents to the extension of the tourism industry. There have been several sources which deal with seasonal fluctuations in demand and offer possible measures at micro- and macro-level to counteract seasonal imbalance. While some measures are to be taken at governmental level, at both destination and originating country, some others are to be taken by several sectors of the tourism and other related industries. Improvement in seasonal fluctuations requires serious co-operation between countries, industries and sectors within industries even it is difficult. The measures proposed only provide guidelines and every single destination should adjust and adopt them to their own unique conditions in order to get best results.

The options available for a destination where seasonal concentration in a single season exists outlined by BarOn (1975) and ETAG (1984) as follows:

- to extent main season
- to introduce a second season in spring, autumn or winter
- to provide activities which are not dependent on weather such as conferences or festivals

which can be timed outside the main season, spa and health tourism
- to discourage further expansion of tourism in the main season

ETAG (1984) states that out-of-peak season traveller will have some or all of the following characteristics:

- less concerned with weather than with lack of crowds etc.
- having a hard core interest, special interest
- on a second vacation or short duration vacation
- taking advantage of "good buys" available out of season
- visiting friends and relatives
- convention delegate
- incentive traveller

Allcock (1989) presents the combination of solutions in four main headings to have better seasonal pattern in tourism:

- Variation of the product-mix
- Diversification of the market
- Differential pricing strategies
- State encouragement or facilitation of the staggering of holidays

ETAG's observation should be taken into account and furthermore every destination should determine and know the characteristics of their present and potential off-season markets in order to address the right markets in marketing and promotion activities.

Murdick et al. (1990) state that the basic options in matching capacity to demand depend heavily on underlying strategic decisions. They outline some options as;

- Increase or decrease capacity both in the strategic and mid-term range
- Manage demand to fit capacity constrained by resources or limited flexibility
- Arbitrarily establish capacity at a level significantly below demand

and they propose that if demand fluctuates widely from period to period, a fixed maximum capacity may be set (which may or may not equal demand) and demand can be managed to utilize the facilities near capacity at all times. Several methods can be employed to attract off-season travellers to destinations. These can be employed by governments and private sectors. However, the main goal in improving seasonal pattern should be to change and manipulate demand for tourism products and services and match demand and the capacity as much as possible. Measures need to be durable and provide long-term solutions.

Government and public sector measures

- Setting detailed carefully designed strategic year-round marketing plan and supporting private sector initiatives in off-season marketing promotion

- Leading continues market research and development initiatives
- Introduction of new tourism centres and new products
- Introducing financial incentives to attract off-season travellers and encourage the private sector to operate in off-season (taxation, VAT exemptions, social security, financial support for improvement of facilities to operate in off-season and to invest in all-weather facilities
- Making necessary arrangements to stagger school holidays and paid vacations
- Supporting price reduction by lower taxation in off-season
- Improve off-season destination image of the country
- Using some buildings which are occupied by students during academic year and by staff and guests of public institutions

Private sector measures:

- Work hand in hand with the public sector in off-season tourism development
- Introduce price reductions in off-season
- Producing attractive all-in packages with special attractions and concessions
- Organising special activities such as festivals, fairs, exhibitions which suit the expectations of off-season travellers
- Making necessary arrangements to improve or introduce additional facilities and products which helps to generate off-season business (international convention facilities, all-weather activity centres, special activities offered for particularly business travellers such as golfing and sightseeing)
- Encouraging domestic travellers to take their holidays in off-season
- Instead of fixed investments, renting the required facilities such as rooms, seats, vehicles for their customers to meet peak-season demand
- Opening new and/or additional facilities to develop off-season business and attract off-season travellers. i.e. construction of heated indoor pools, congress centres, all-weather activity centres.

As Lumsdon (2002) states activities focused on seasonal extension by new attraction investments rather than attempting to create an all-year offering create results that are more successful.

According to O'Clery (1999) a key initiative to overcome seasoal and spatial imbalance problem is product development, emphasising new events and attractions which reflect the area's features peculiar to the region and are are not necessarily activities that need large crowds and can be targeted carefully towards particular groups such as special interests groups, certain age groups or economic groups. Several measures have been proposed to improve spatial imbalance such as improvement of the destination's image, linking popular tourism types with inland tourism, development and encouragement of social and domestic tourism, provision of infra-structure in less developed areas, intensified marketing and promotion, bringing old ancient roads and paths into life and create and sell different atmosphere, manipulating mass-tourism and tour-operators' domination and preferences and supply-side diversification and developing local resources peculiar to that area: golf, riding, sailing, angling, hunting, village tourism, high-plateau (yayla) tourism, thermal tourism, cave tourism, skiing, rural tourism, adventure, safari, using traditional tents for accommodation instead of building concrete jungles etc.

2.6. Development of tourism and spatial imbalance in Turkey

This chapter investigates past and present distribution patterns of tourism supply and demand in Turkey. It concentrates on the bed capacity, the size of accommodation facilities, employment, occupancy rates, average length of stay, Defert's Tourist Function Index (DTFI), Tourism Intensity Index (TII), regional foreign tourism demand by purpose of visit, development trends of tour operators and travel agencies and educational institutions to identify recent changes. Through the chapter factors influencing these patterns and effects of these patterns on the regions are discussed.

Tourism supply and demand varies from one region to another in many destination countries. Imbalanced distribution of tourism has been exacerbated by the emergence and development of mass tourism, which tends to be highly spatially polarised (Shaw and Williams 1994). Rapid development in many blooming tourism destinations, where tourism is a relatively recent phenomenon, has caused more problems than expected benefits. As Heath and Wall (1992) express economic objectives have primarily been pursued, social and environmental consequences are neglected and less beneficial tourism is formed, which triggers the formation of the negative impacts of spatial imbalance. Although there are essential, diversified and adequate resources and attractions throughout the destination countries, concentration of tourism supply and demand in particular regions has caused pressure and destruction of tourism resources in those regions and an uneven distribution of benefits between regions and people. Insights into the complex spatial behaviour of visitors and the spatial variations in tourism supply are essential in the successful development and monitoring of tourism projects.

Accommodation statistics tend to be used mainly to indicate spatial variations to indicate the importance of tourism in regions or to identify regions which offer different types of tourism products; some studies incorporate elements of both (Pearce 1995). To understand spatial patterns and to be able to take appropriate planning and development measures for a more even distribution of tourism activities and benefits, analysis should consider both supply- and demand-side issues. Information on supply is obtained from accommodation statistics, but detailed information on tourism demand may only be obtained by conducting visitor surveys or from official survey results. This study uses information and survey results by province provided by the Turkish Ministry of Tourism (TMT). Statistics include only accommodation establishments licensed by the TMT.

2.7. Spatial concentration in Turkish tourism supply

Turkey has become a fashionable destination for tourists, especially European tourists, as a result of its location, history, culture, nature, hospitable people and other unique characteristics which differentiate it from competing destinations. However, '*despite its long history, tourism is a more recent phenomenon in Turkey going back no more than thirty years*' (O'Reilly, 1993, p.77). Turkish tourism started to emerge in the 1960s with the first national Five-Year Development Plan,

but rapid development in the Turkish tourism industry has occurred only since the 1980s, resulting from internal peace, greater political stability and new, reformist and liberal economic policies which included tourism investment incentives. Between 1963-2003 there was a sharp increase in foreign visitor arrivals (70 times), in foreign tourism receipts (1263 times), in foreign tourism receipts per head (18 times), in the share of tourism receipts in the export earnings (13 times) and finally in Gross National Product (55 times) (Table 2.1). However, increase in tourism expenditures (103 times) was not as high as the increase in tourism receipts and the share of tourism expenditures in import expenses remained almost level between 1963 and 2003 (3.0-3.5%).

Increasing demand, rapid development and encouraging financial incentives have attracted investments in tourism. Foreign and Turkish investors have invested particularly in coastal locations and a few interior provinces where tourism businesses are highly profitable in the short-term. Economic policies aiming to develop the tourism industry quickly and help the Turkish economy to solve its balance of payment difficulties have caused destructive problems in the long-term by directing investments and visitors mainly towards coastal regions, especially to the Mediterranean and Aegean coasts.

Table 2.1 The main indicators of tourism in Turkey by years

	Main indicators of Turkish tourism by years						
Years	Visitor Arrivals	Tourism Receipts $ thousand	Receipts per visitor $	% share in Export earnings	% share of receipts in GNP	Tourism Expenditure $ thousand	% share in Import expenses
1963	198841	7659	38.5	2.1	0.1	20511	3.0
1970	724784	51597	71.2	8.8	0.5	47738	5.0
1975	1540904	200861	130.4	14.3	0.5	154954	3.3
1980	1288060	326654	253.6	11.2	0.6	114738	1.5
1985	2614924	1482000	566.7	18.6	2.8	323600	2.9
1990	5389308	3225000	621.3	24.9	2.1	520000	2.3
1995	7726886	4957000	684.0	22.9	3.0	912000	2.6
1997	9689004	8088549	876.0	30.8	4.2	1716000	3.5
2000	10428153	7636000	764.3	27.8	3.8	1711000	3.2
2003	14029558	9676600	702.5	28.2	5.5	2113300	3.1

Source: Bulletin of Tourism Statistics -2004, Turkish Ministry of Tourism, Ankara

The spatial distribution of accommodation establishments and the significance of tourism in the seven geographical regions have changed considerably since the 1980s. This problem was identified by Robinson (1976) almost three decades ago by noting the allocation of 90% of total tourism investment to the coastal areas' development in the Second Five-Year Development Plan. As a result of these short-sighted policies, interior regions are neglected and the benefits from tourism are going to those areas, which from the economic point of view, need them least (Robinson, 1976). There was a 729% increase in bed capacity in coastal areas between 1983 and 2003, rising from 49845 to 363394 beds. Inner regions showed only a 356% increase (from 16089 to 57303 beds) in the same period. Total average bed capacity increase indicated 638% increase, rising from 65934 in 1983 to 420697 in 2003.

Research, based on the State Statistics Institute's input-output analysis, indicated that while Turkish tourism industry receives input from 38 sectors of the Turkish economy of which six of are main sectors, total of 10 sectors benefits from the outputs of the Turkish tourism industry (Resort 2002).

The Turkish tourism industry provides input respectively for following sectors:

1- Wholesale and retail trade
2- Airways
3- Professional services
4- Seaways
5- Tourism
6- Railways
7- Banking
8- Forestry
9- Roadways
10- Communication

The Turkish tourism industry receives input respectively from following sectors:

1- Animal breeding
2- Wholesale and retail trade
3- Roadways
4- Agriculture
5- Other food products
6- Individual & Professional services
7- Alcoholic drinks
8- Sugar production
9- Banking, insurance and co-operatives
10- Communication
11- Other petrol and coal products
12- Petrol refinery
13- Non-alcoholic drinks
14- Vegetable oil and animal fat production
15- Grinded grain production
16- Fishery
17- Meat products
18- Paper products
19- Electricity
20- Medical industry
21- Tourism
22- Water and gas
23- Other chemical products
24- Steel products
25- Forestry
26- Textile industry
27- Tobacco sector
28- Publishing and binding
29- Other stone and soil products
30- Vegetable and fruit processing
31- Coal mining
32- Sea transport
33- Plastics industry
34- Glass and glassworks industry
35- Air transport
36- Other manufacturing industries
37- Railway transport
38- Electrical machinery

Turkish accommodation sector and changing patterns

Table 2.2 illustrates the change in the number of beds between regions since 1983. While Marmara, which includes Istanbul, had the highest number of beds until 1989, since then, the Mediterranean region, which includes the popular coastal resort town of Antalya, has become the main focus reflecting the movement in demand and supply of tourism from cultural products spread throughout Turkey towards peak-season holiday products such as sea, sun and sand.

When regional bed capacity between 1983 and 2003 is examined, sharp polarisation in the supply of accommodation is evident. The Mediterranean region had as high as 1941% increase in its bed capacity while its closest rival and neighbouring region, Aegean, recorded a 774% increase. In terms of increase in bed capacity between 1983 and 2003, Marmara became the sixth region out of seven regions with an increase of 279%, above East Anatolia which achieved only a 276%

increase. It is also worth noting that usually one or two provinces in each region, which may be named as regional gateways, possess the largest share in regional bed capacity. For example in Marmara, Istanbul had 67.1% of the capacity, in Aegean, Mugla had 47.2%, in Mediterranean, Antalya had 76.6% and in Central Anatolia, Ankara had 44.4% of the bed capacity in 2003.

Table 2.2 illustrates that share of top ten destination provinces in accommodation capacity increased from 77.4% in 1983 to 85.2% in 1990 and its peak to 87.8% in 2003, identifying relative decline in other regions' and provinces' share and increasing concentration of accommodation facilities in few provinces. The concentration mostly takes place in Antalya in Mediterranean, Mugla in Aegean and Istanbul in Marmara region. While provinces in Mediterranean region formed 45.6% of overall bed capacity in top ten provinces (369474 beds), provinces in Aegean, 30.4%, in Marmara, 17.8 % and in Central Anatolia followed them with 6.2% in 2003. No provinces in Black Sea, Eastern and South Eastern Anatolia had been able to occupy a place in top ten.

On the other hand, average number of beds by regions and provinces indicate interesting results. While average number of beds per accommodation was 107.9 in 1983, it showed around 74% increase and reached to 187.8 beds per accommodation in 2003. The size difference between coastal and inner regions widen through the years in favour of coastal regions. Average bed capacity difference between coastal and inner regions was 29.3 beds in 1983, but it increased to 70.4 beds in 2003. In other words, while larger accommodation establishments were built and brought into operation in coastal provinces, it did not show a dramatic increase in inner provinces (Table 2.4, Table 2.5).

On the regional base, the largest increases in average bed capacity were recorded in Mediterranean, South East Anatolia, Central Anatolia, Aegean, East Anatolia and Marmara respectively. Tourism activities concentrated in particularly in Antalya and partly in Icel and their coasts in Mediterranean region which showed the 178% increase in its average bed capacity and reached from 96.7 beds to 269.6 beds in 2003. The 56.2% increase of average bed capacity in South East Anatolia stems from the new investments made in the region but, the total number of beds and average bed capacity are still well below the other regions 114.2 beds, except for the Black Sea region which has 95.5 beds in 2003.

As an inner region, Central Anatolia showed 44% increase in its average bed capacity per accommodation. However, concentration of accommodation investment in Ankara as capital province and Nevsehir in the Cappadocia tourism area increased the average size of accommodation. As Aegean region, on the other hand, consists of small number of provinces and most of these provinces have several tourism destinations and tourism centres, this region realised the 35% increase in its average bed capacity per accommodation between 1983 and 2003 and reached to 179 beds in 2003. Fethiye, Marmaris, Milas, Bodrum, Datca in Mugla, Kusadasi, Didim

in Aydin, Pamukkale (Cotton Castle) in Denizli, Cesme, Urla, Selcuk Ephesus in Izmir, thermal tourism centres in Afyon make the distribution of tourism particularly through the coastal line of Aegean region more balanced and make more participation in tourism by inner and coastal provinces in this region possible compared to other regions.

The main reason for larger size accommodation particularly in coastal regions and important tourism centres is to meet high demand as much as possible in peak season to compensate for lower levels of demand in the off-season and achieve the highest possible annual occupancy rates. However, larger capacity to meet peak-season demand can cause high unemployment and financial difficulties in meeting fixed costs in off-season if necessary measures are not taken. As Table 2.4 shows, in parallel to lower tourism demand, average size of accommodation in inner regions are smaller and the increase rate in their average bed capacity were significantly lower between 1983 and 2003.

Despite some minor changes, the same provinces shared the top ten ranks of average bed capacity and most of these provinces are located on coasts and contain several tourism destinations. Antalya, Aydin, Izmir, Mugla and Istanbul are the top coastal provinces in terms of average bed capacity per establishment. However, the inner provinces with higher average bed capacity, such as Afyon, Erzurum, Denizli, Nevsehir and Kirsehir indicate an interesting development trend. While Denizli serves mostly foreign visitors and attracts foreigners with natural beauty of Pamukkale, Afyon, on the other hand, serves mostly Turkish citizens and attracts its visitors with its several and rich thermal spa centres. As a result of high demand for spas and health establishments, either present establishments increase their capacity or new ones with high capacity constructed in Afyon which is the important example to tourism potential and development in inner provinces. Nevsehir, as a province in the centre of the Cappadocia region, attract many visitors to its naturally formed fairy chimneys every year and Erzurum in Eastern Anatolia has come forward in the recent years with its Palandoken ski centre which attracts foreign visitors from Europe, Middle East, Georgia, Russia and Iran.

Table 2.2 Change in the bed capacity (1983-2003)

	Marmara	%	Aegean	%	Mediterranean	%	C.Anatolia	%	Black Sea	%	E.Anatolia	%	SE.Anatolia	%	Total	%	Coastal	%	Inner	%
1983	26100	39.6	15518	23.5	8995	13.6	8627	13.1	2698	4.1	2461	3.7	1535	2.3	65934	100	49845	75.6	16089	24.4
1984	26935	39.5	16242	23.8	9768	14.3	8328	12.2	2849	4.2	2693	3.9	1451	2.1	68266	100	51835	75.9	16431	24.1
1985	32266	37.5	22218	25.8	13193	15.3	11091	12.9	3077	3.6	2558	3.0	1592	1.9	85995	100	66097	76.9	19898	23.1
1986	33658	36.5	23508	25.5	15358	16.7	11994	13.0	3676	4.0	2359	2.6	1576	1.7	92129	100	70933	77.0	21196	23.0
1987	36429	34.3	25739	24.2	23806	22.4	12542	11.8	3679	3.5	2467	2.3	1552	1.5	106214	100	84035	79.1	22179	20.9
1988	38526	31.5	31183	25.5	30122	24.6	14254	11.7	3818	3.1	2609	2.1	1794	1.5	122306	100	97559	79.8	24747	20.2
1989	40654	27.8	38387	26.3	41430	28.4	16141	11.0	4710	3.2	2632	1.8	2132	1.5	146086	100	117973	80.8	28113	19.2
1990	44443	25.7	45494	26.3	55246	31.9	17696	10.2	5076	2.9	2828	1.6	2444	1.4	173227	100	142215	82.1	31012	17.9
1991	49032	24.4	57069	28.4	63743	31.8	19723	9.8	5494	2.7	3009	1.5	2608	1.3	200678	100	166030	82.7	34648	17.3
1992	52060	23.7	64276	29.2	71797	32.6	20053	9.1	5892	2.7	3093	1.4	2769	1.3	219940	100	183673	83.5	36267	16.5
1993	54257	23.1	70785	30.1	77759	33.1	20296	8.6	5844	2.5	3090	1.3	3207	1.4	235238	100	198028	84.2	37210	15.8
1994	59281	22.4	81765	30.8	87979	33.2	21185	8.0	6958	2.6	4330	1.6	3638	1.4	265136	100	224073	84.5	41063	15.5
1995	60433	21.5	87763	31.3	95581	34.1	21457	7.7	7466	2.7	4476	1.6	3287	1.2	280463	100	239793	85.5	40670	14.5
1996	63777	21.2	93225	30.9	105801	35.1	22739	7.5	7706	2.6	4688	1.6	3588	1.2	301524	100	258472	85.7	43052	14.3
1997	63887	20.4	96105	30.7	112125	35.8	23561	7.5	8780	2.8	4734	1.5	3942	1.3	313134	100	269033	85.9	44101	14.1
1999															319313	100				
2001	69337	18.8	108724	29.5	143787	39.0	24995	6.8	10089	2.7	6238	1.7	5649	1.5	368819	100	317929	86.2	50890	13.8
2003	72913	21.8	120133	30.0	174680	28.9	29268	9.5	11075	5.2	6803	2.4	5825	2.3	420697	100	363394	80.5	57303	19.5

Source: Statistical Yearbook of Licensed Tourism Facilities, 1983-2001, General Directorate of Enterprises, Turkish Ministry of Tourism, Ankara.

Table 2.3 Change in Operation Licensed Beds by Province (1983-2003)

1983					1990					2003				
Rank	Province	Region	Beds	%	Rank	Province	Region	Beds	%	Rank	Province	Region	Beds	%
1	Istanbul	Marmara	15156	23.0	1	Antalya	Mediterranean	47299	27.3	1	Antalya	Mediterranean	163468	38.9
2	Izmir	Aegean	6196	9.40	2	Istanbul	Marmara	26586	15.3	2	Mugla	Aegean	66287	15.8
3	Antalya	Mediterranean	5390	8.17	3	Mugla	Aegean	19741	11.4	3	Istanbul	Marmara	51518	12.2
4	Ankara	C.Anatolia	5182	7.86	4	Izmir	Aegean	11569	6.67	4	Izmir	Aegean	23891	5.7
5	Balikesir	Marmara	4347	6.59	5	Aydin	Aegean	10793	6.23	5	Aydin	Aegean	21965	5.2
6	Mugla	Aegean	4288	6.50	6	Ankara	C.Anatolia	9828	5.67	6	Ankara	Central	15505	3.7
7	Bursa	Marmara	4286	6.50	7	Bursa	Marmara	7040	4.06	7	Balikesir	Marmara	8154	1.9
8	Aydin	Aegean	3622	5.49	8	Balikesir	Marmara	6382	3.68	8	Nevsehir	Central	7351	1.7
9	Adana	Mediterranean	1377	2.09	9	Nevsehir	C.Anatolia	4385	2.53	9	Bursa	Marmara	6208	1.5
10	Icel	Mediterranean	1155	1.75	10	Icel	Mediterranean	3970	2.29	10	Icel	Mediterranean	5127	1.2
Total			50999	77.4	Total			147593	85.2	Total			369474	87.8

Source: Statistical Yearbook of Licensed Tourism Facilities, 1983-2003, General Directorate of Enterprises, Turkish Ministry of Tourism, Ankara.
*New provinces included in the provinces which they belonged to before becoming province **Aksaray included in Nigde, Kirikkale in Ankara, Karaman in Konya, Batman & Sirnak in Siirt, Bartin & Karabuk in Zonguldak, Igdir and Ardahan in Kars, Yalova in Istanbul, Kilis in Gaziantep, Osmaniye in Adana, Duzce in Bolu.

Table 2.4 Average number of beds per operation licensed and Ministry registered accommodation by region (1983-2003)

	Average number of beds per operation licensed and Ministry registered accommodation by region									
	1983		1987		1990		1993		2003	
Rank	Region	Beds	Region	Beds	Region	Beds	Region	Beds	Region	Beds
1	Aegean	132.6	Mediterran	150.7	Mediterran	177.1	Mediterran	188.7	Mediterran	269.6
2	Marmara	113.0	Aegean	128.7	C.Anatolia	133.1	Aegean	147.2	Aegean	179.0
3	Mediterran	96.7	Marmara	127.8	Aegean	130.0	C.Anatolia	138.1	Marmara	149.4
4	C.Anatolia	95.9	C.Anatolia	123.0	Marmara	128.1	Marmara	133.3	C.Anatolia	138.1
5	E.Anatolia	94.7	E.Anatolia	98.7	E.Anatolia	94.3	E.Anatolia	96.6	E.Anatolia	126.0
6	Black Sea	81.8	Black Sea	85.6	Black Sea	87.5	Black Sea	91.3	S.E.Anatoli	114.2
7	S.E.Anatoli	73.1	S.E.Anatoli	73.9	S.E.Anatoli	81.5	S.E.Anatoli	84.4	Black Sea	95.5
	Turkey	**107.9**	**Turkey**	**127.4**	**Turkey**	**137.5**	**Turkey**	**148.8**	**Turkey**	**187.8**
1	Coastal	116.7	Coastal	133.6	Coastal	143.9	Coastal	156.2	Coastal	201.5
2	Inner Prov.	87.4	Inner Prov.	108.2	Inner Prov.	114.0	Inner Prov.	118.9	Inner Prov.	131.1

The number of accommodation establishments in provinces plays an important role in calculating average bed capacity per establishments. For instance, although there were only one or two establishments with a hundred or more bed capacity in some provinces, in some others there were ten, fifty, a hundred establishments with more than a hundred bed capacity, they both may occupy a place in top ten ranks in terms of average bed capacity. Kirsehir where there is only two hotels with a total of 343 bed capacity and Antalya where there were 559 accommodation with either small or large bed capacity in 2003 can be very good examples to this subject. Therefore, it is essential to consider the overall number of establishments and their bed capacity in a province when evaluating (Table 2.5).

Table 2.5 Top ten average numbers of beds per operation licensed and Ministry registered accommodation by province

	Top ten average number of beds per operation licensed and Ministry registered accommodation by province									
	1983		1987		1990		1993		2003	
Rank	Province	Beds	Province	Beds	Province	Beds	Province	Beds	Province	Beds
1	Izmir	187.8	Antalya	178.3	Kirsehir	264.0	Kirsehir	264.0	Antalya	292.4
2	Aydin	172.5	Izmir	169.3	Antalya	199.6	Antalya	209.9	Afyon	257.8
3	Bursa	133.9	Bursa	166.1	Bursa	180.5	Bolu	177.4	Aydin	213.3
4	Bolu	129.1	Bolu	149.3	Nevsehir	175.4	Bursa	176.5	Erzurum	207.6
5	Istanbul	123.2	Edirne	142.4	Bolu	153.6	Nevsehir	174.9	Denizli	198.3
6	Adana	114.8	Nevsehir	141.5	Ankara	142.4	Aydin	161.3	Nevsehir	193.4
7	Ankara	112.7	Elazig	137.0	Aydin	142.0	Ankara	152.1	Izmir	181.0
8	Elazig	108.8	Ankara	136.7	Izmir	137.7	Izmir	147.9	Kirsehir	171.5
9	Balikesir	108.7	Aydin	136.2	Adana	137.7	Mugla	146.5	Mugla	170.8
10	Van	107.0	Istanbul	131.0	Elazig	137.0	Istanbul	141.3	Istanbul	170.0
	Turkey	**107.9**	**Turkey**	**127.4**	**Turkey**	**137.5**	**Turkey**	**148.8**	**Turkey**	**187.8**
	*New provinces included in the provinces which they belonged to before becoming province **Aksaray included in Nigde, Kirikkale in Ankara, Karaman in Konya, Batman & Sirnak in Siirt, Bartin & Karabuk in Zonguldak, Igdir and Ardahan in Kars, Yalova in Istanbul, Kilis in Gaziantep, Osmaniye in Adana, Duzce in Bolu									

Table 2.6 The average investment cost for the Turkish Ministry of Tourism Licensed Accommodation

The average investment cost for the Turkish Ministry of Tourism Licensed Accommodation	
Type of Accommodation	Investment Cost for per bed ($)
5* Deluxe	41,465
5*	37,310
4*	24,870
3*	15,755
2* with restaurant	9,950
2*	8,215
1*	7,050
Motel	9,905
1st Class Holiday Village	17,000
2nd Class Holiday Village	14,015
Boarding House	6,220
Source: TURSAB (1998) Gostergeler, TURSAB, June 1998, No: 173, pp. 63	

The total investment cost of a hotel depends on factors such as its region, location in the region and land prices. The average investment cost per bed for the quality accommodation indicates that the luxury accommodation costs between 3 to 7 times more than the moderate and small accommodation investments. Therefore, by giving up building large and luxury hotels, 3 to 7 small or moderate accommodation can be built.

Change in the number of employment in Turkish tourism

As indicated below, the direct tourism employment in Turkish Ministry of Tourism and Municipality licensed accommodation establishments, food and beverage sector, transportation companies and travel agencies increased from 662,081 in 1993 to 1,007,793 in 2001 indicating a 52,2% increase in only eight-year period. It has been estimated that indirect employment in the tourism industry is approximately 1.5 times over the direct employment. According to TURSAB Ar-Ge Department's (2004) estimates, direct employment in Turkish tourism industry exceeded 1.200.000 in the end of 2003 and overall direct and indirect employment in tourism, on the other hand, reached to 3.000.000 in the same year. (TURSAB, 2004).

Table 2.7 Employment in Turkish Tourism Industry

Employment in Turkish Tourism Industry					
	Direct Tourism Employment	Change %	Share of Direct Employment in Overall Employment	Direct & Indirect Employment	Share of Direct & Indirect Employment in Overall Employment
1993	662,081		3.5	1,617,703	8.7
1997	891,334	17.1	4.3	2,228,334	10.7
1998	975,399	9.4	4.6	2,438,498	11.4
1999	1,012,152	3.8	4.6	2,530,379	11.6
2000	1,009,211	-0.3	4.8	2,523,026	12.1
2001	1,007,793	-0.1	5.1	2,519,481	12.8
Source: TURSAB, 2004					

Despite the 5.7% decrease in overall employment in Turkey due to the financial crisis, it was only 0.1% in direct tourism employment which resulted in the increase of the share of direct tourism employment from 4.8% in 2000 to 5.1% in 2001. In the mean time, tourism industry increased its share in overall employment in Turkey from 12.1 in 2000 to 12.8 in 2001. When the main sectors of the Turkish tourism industry are analysed, employment in travel agencies and accommodation sector increased by 11% and 6.5% and reached to 22390 and 161207 respectively in 2001. Only the transportation sector was affected badly by the financial crisis and employment in this sector decreased by 7.9% and declined to 674000 (TURSAB, 2004). As a consequence, existence of tourism industry provide jobs for nearly 5% of the total population or 12% of the active working force reflecting the increasing importance of tourism to the Turkish economy and people.

It should be noted in the following section that only accommodation sector employment figures below between 1994 and 1996 were able to be obtained from the TMT. Despite several attempts, the tourism authorities failed to supply the updated information.

Table 2.8 shows the development in employment in Turkish tourism between 1994 and 1996. The overall employment indicated 15.8% increase in 1995 compared to employment in 1994 and 26.1% in 1996 compared to 1995 figures. In other words, there has been significant increase in employment in Turkish tourism industry particularly in the last decade of the millennium which mainly resulted from the increase in the demand for Turkish tourism and consequently in bed capacity. Despite significant increase, total of 78895 jobs (53233 in Ministry registered and 25662 jobs in Municipality registered accommodation) in Turkish tourism industry is rather small when the tourism potential of the country considered.

Despite a small decrease in 1995, the share of coastal provinces in overall employment increased throughout years and reached to 83.8% of total in 1996. In the same way, coastal provinces employed as much as 96.2% of temporary and 78.8% of permanent employees of Turkish tourism. It is clearly seen that, coastal provinces dominate in permanent, particularly seasonal temporary employment and overall employment and spatial imbalance in tourism employment gets worse year by year.

The distribution of tourism employment between regions of Turkey indicates the supreme domination of Mediterranean, Marmara and Aegean regions. While Mediterranean region's share in overall, permanent and temporary employment showed steady increase between 1994 and 1996, Marmara and Aegean regions indicated unstable and generally decreasing trend in their share in employment. As Table 2.8 shows, while most temporary jobs were provided in Mediterranean, in particular, and in Aegean regions where significant number of seasonal accommodation exists on the coast and operate through the main peak season, the majority of permanent employment was realised in Marmara where significant percentage of accommodation operate 12-month long.

Table 2.8 Number of employment in Turkish Tourism Ministry registered accommodation Establishments, 1994-1996

	Employment in Ministry registered accommodation establishments (1994-1996)								
	1994			1995			1996		
	Permanent	Temporary	Total	Permanent	Temporary	Total	Permanent	Temporary	Total
Marmara	8661	1186	9848	10932	951	11883	12541	1000	13541
Aegean	4670	4004	8674	5386	3555	8941	6636	5786	12423
Mediterr.	6844	4840	11683	8844	5505	14349	11585	7936	19521
C.Anatol.	3495	370	3864	4083	208	4291	4277	257	4534
B. Sea	1239	223	1462	1353	77	1430	1661	111	1772
E.Anatolia	326	66	392	551	82	633	606	137	743
SE.Anatol.	462	57	518	643	29	673	674	25	699
Coastal	19875	10012	29887	24200	9948	34148	29922	14677	44599
Inner	5821	734	6555	7593	460	8052	8058	577	8634
Turkey	25696	10746	36441	31793	10408	42201	37980	15253	53233

** Apart from above figures, 18677 staff in qualified, 6985 staff in unqualified and total of 25662 staff were employed in Municipality registered accommodation establishments in 1997*

** Employment figures represent only accommodation establishments participated in annual accommodation surveys carried out by Turkish Ministry of Tourism

Source: Turkish Ministry of Tourism, Ankara

From the different point of view, the rate of permanent and temporary staff in overall employment can be analysed and compared with each other. While permanent employment formed 92.6% of overall employment in Marmara in 1996, 94.3% in Central Anatolia, 93.7% of Black Sea, 81.6% in East Anatolia and 96.4% in South East Anatolia where business, cultural, natural and other special interest tourism resources and activities are the main attractions, temporary employment reaches to as high as 46.6% of overall employment in Aegean region, 40.6% in Mediterranean region where coastal tourism is popular in peak season. In the mean time, while 67.1% of overall employment was permanent in coastal regions, it raised up to 93.3% in inner provinces. In average 71.3% permanent and 28.7% temporary jobs were available in Ministry registered accommodation in Turkey.

It can be summarized that, most temporary jobs are offered by regions where the main tourism product is sea-sun-sand and some accommodation establishments operate in peak season, and most permanent employment are available in regions where business and cultural, natural and various other tourism resources are the main products and most accommodation facilities are open 12-month long. The imbalance in the distribution of popular tourism attractions, overall tourism resources, tourism demand and tourism facility supply and investment is naturally reflected to the regional employment numbers and East, South East Anatolia and Black Sea regions employs the least employee in Turkey.

Thanks to temporary local workers whose job in the industry is usually their secondary job apart from usually agriculture and the students from all around the country studying tourism and hotel management or other subjects employed in the industry in peak season, seasonal employment does

not cause serious problems where seasonal employment is high, namely in Mediterranean and Aegean regions. However, seasonal migration to these regions in peak season, seasonal unemployment, social and economical problems related to unemployment could be faced in the future if concentration of tourism activities continue to concentrate in particular time an space and when destinations are managed more professionally. Tourism policy-makers should consider every consequence of tourism development projects at micro- and macro levels when deciding on new strategies and policies in order to minimise the effect of adverse affects of tourism in regions and improve the imbalance between regions.

Turkish travel sector and transportation

Travel agencies and tour operators are also a new and developing sector in Turkey. For this reason, they have not reached to sufficient and adequate numbers and standards yet. However, Turkish travel agencies demonstrate a stable development process. Although most of them offer incoming services to foreign tour operators, some operate successful both international incoming and outgoing tours. Existing travel agencies and their development through years is seen on (Table 2.9). Despite the decrease in increase rate in number of travel agencies in 1993, the sector tried hard to catch up the increase rate achieved in 1990. Several factors, such as the Gulf War in 1990, its consequences and global and national crisis in economy, affected the increase rate of travel agencies and some agencies had to leave this sector. Turkish travel sector has faced the even larger crisis in economy and particularly tourism industry crisis as a result of new tourism policies brought into effect by European Union which are related to EU country residents travelling outside, the capture and trial of head of a terrorist organisation and negative propagation of his supporters in particularly Europe and major earthquakes. In addition the final financial crisis in 2001 slowed down the development trend. Although this crisis' effects have been felt decreasingly since then and only 3.9% increase rate in the number of travel agencies in 2004 recorded compared to 2001.

Table 2.9 Development of Turkish travel sector (1986-2004)

	Development of Turkish Travel Agencies between 1986-2004									
	Group A		Group AG		Group B		Group C		TOTAL	
		% Change		% change		%		%		%
1986	195	-	101	-	112	-	83	-	491	-
1990	418	114.4	247	144.5	148	32.1	82	-1.2	895	82.3
1993	583	39.5	516	108.9	142	-4.05	118	43.9	1359	51.8
1997	1283	120.1	719	39.3	175	23.2	214	81.4	2391	75.9
2001	3116	142.9	665	-7.5	232	32.6	439	105.1	4452	86.2
2004	3511	12.7	543	-18.3	219	-5.6	355	-19.1	4628	3.9

The companies operating in Turkey are not named and classified as "tour operators" and "travel agencies" as in Europe. All travel companies in Turkey are defined as "travel agency" but they are classified in three distinctive groups and differentiated from each other by their duties and

responsibilities in the sector determined and supervised by the Union of Turkish Travel Agencies (TURSAB).

Group A travel agency:
Performs all the recognised tour operator and travel agency activities

Provisional Group A travel agency:
Performs all the recognised tour operator and travel agency activities but carries provisional license. When the company proves its capability in tour operation and other activities and fulfils its responsibilities successfully in two years, the company is promoted to Group A travel agency.

Group B travel agency:
Group B and C travel agencies' activities are restricted. Group B companies are confined to ticketing and activities relating Group A travel agencies' tour operations.

Group C travel agency:
Organises tours for the domestic market only and undertake activities given by Group A travel agencies.

All Turkish travel agencies and tour operators are strictly controlled and inspected by the Union of Turkish Travel Agencies (TURSAB) to maintain quality and standards of the tour operations and related activities so that they can be capable of competing with rival foreign companies. In the mean time, as other companies in tourism industry such as accommodation establishments travel agencies are given some incentives by the Turkish Ministry of Tourism to support them to become major tour operators and compete successfully in the international markets.

Table 2.10 Distribution of travel agencies by region, 2004

	Distribution of Turkish Travel Agencies by region 2004									
	Group A		Group AG		Group B		Group C		TOTAL	
REGIONS		%		%		%		%		%
Marmara	1246	35.5	225	41.4	115	52.5	223	62.8	1809	39.1
Aegean	889	25.3	109	20.1	28	12.8	63	17.7	1089	23.5
Mediterranean	813	23.2	117	21.5	12	5.5	29	8.2	971	21.0
Central Anatolia	422	12.0	61	11.2	30	13.7	14	3.9	527	11.4
Black Sea	49	1.4	9	1.7	6	2.7	23	6.5	87	1.9
East Anatolia	31	0.9	11	2.0	14	6.4	2	0.6	58	1.3
South East Anatolia	61	1.7	11	2.0	14	6.4	1	0.3	87	1.9
TOTAL	3511	100	543	100	219	100	355	100	4628	100

It is seen that 87.6% of all travel agencies hold Group A and Group AG temporary work permission. The proportion of these Group A and Group AG travel agencies is 95.8% in Mediterranean, 91.6%in Aegean and Central Anatolia, 81.3% in Marmara, 82.7% in Southeast Anatolia, 66.7% in Black Sea and 72.4% in East Anatolia. In other words, most of all have permission to perform all the recognised tour operator and travel agency activities. It should be noted that, while the majority of travel agencies in Marmara, Aegean and Mediterranean regions organise tours for nationals or provide incoming services to foreign tour operators, apart from few

cities in Central Anatolia and Black Sea, namely Ankara, Konya, Nevsehir and Trabzon, majority of travel agencies in remaining regions and provinces organise outgoing tours to Saudi Arabia for the pilgrimage (hajj), domestic tours to tourism centres and holy places in Turkey and provide ticketing services. It should also be noted that the amount of daily or weekly excursions to surrounding cities and regions are not available in most provinces apart from well known destinations as seen in European countries which may perfectly help to improve domestic tourism movements.

The distribution of travel agencies in Turkey indicates significant imbalance between regions and between provinces (Table 2.10). The main and large travel agencies are concentrated in usually popular regions and provinces. As much as 33.6% of travel agencies are based in Istanbul in Marmara region. 17.9% in Antalya in Mediterranean region, 12.1% in Mugla, 6.3% in Izmir and 3.8% in Aydin in Aegean region and 6.8% of overall travel agencies are based in Ankara in Central Anatolia region. Very small number of travel agencies operate in Black Sea, East Anatolia and South East Anatolia regions compared to other popular regions and their total share does not exceed 5.1% which indicates high concentration of travel agencies in western regions and negligence of northern and eastern regions and provinces.

When A, B and C group travel agencies in coastal and inner regions are compared, supreme domination of coastal provinces is seen clearly in all groups (Table 2.11). While 83.1% of overall travel agencies are based in coastal provinces, only 16.9% based in inner provinces. Istanbul (33.6%), Antalya (17.9%), Mugla (12.1%), Ankara (6.8%), Izmir (6.3%), Aydin (3.8%), Bursa (2.3%) and Adana (1.5%) are identified as major coastal concentration centres for travel agencies. All of these provinces are located on coast and business and cultural tourism exist in some of these provinces such as Istanbul which was the capital of Ottoman Empire and is the main business centre of Turkey, Izmir where famous ancient ruins of Ephesus and Pergamon are located and is the business centre for Western Turkey and Bursa, capital of early Ottoman Empire, where business, cultural, thermal, natural and winter tourism dominate. On the other hand, majority of travel agencies based in inner provinces concentrate in capital of Turkey, Ankara (6.8%), Konya (1.4%) where Mevlana, whirling dervishes based and religious values come forward and Nevsehir (1.4%) where natural wonder of Cappadocia and naturally shaped stones and very old cave churches exist.

As clearly seen, travel agencies are concentrated mainly in coastal provinces where either popular mass tourism products such as coastal and cultural tourism attractions or attractive business opportunities are offered. They are particularly concentrated in Istanbul where the most important and busy airport is located and offers intensive all year round cultural, business and congress tourism opportunities. Unfortunately, although almost all provinces have the capability and various tourism resources to offer, inadequate infra-structure and consequently low investment rate on supra-structure, incorrect policies and lack of promotion do not permit these provinces to sell their

own products. Only a very small number of travel agencies operate in these provinces as a result of false tourism development strategies and inadequate incentives to encourage travel agencies as well as other tourism facilities like accommodation to base in these regions and offer local and regional values to tourists from all over the world. It is understandable that it is particularly very difficult to persuade investors from outside the region to invest regions where is not profitable in short-term, not stable and settled. In these respect, starting particularly from the local investors who want to serve their region and provide jobs to local people and raise their living standards, all investors in tourism and other related industries should be supported by first of all completion of infra-structure, attractive financial aids, technical help in creating new projects and various incentives and exemptions which make investors' life easier in these regions.

Table 2.11 Distribution of travel agencies by coastal and inner provinces, 2003

	Distribution of Turkish Travel Agencies by province 2003									
	Group A		Group AG		Group B		Group C		TOTAL	
REGIONS		%		%		%		%		%
Agencies in Coastal provinces	2910	82.9	450	82.9	157	71.7	327	92.1	3844	83.1
Agencies in Inner provinces	601	17.1	93	17.1	62	28.3	28	7.9	784	16.9
TOTAL	3511	100	543	543	219	100	355	100	4628	100

Table 2.12. shows the type of activities with which Turkish travel agencies engage. While around 38% of travel agencies in 1998 and 19% in 2002 engage with domestic operations and ticketing, the remaining 62% and 81% respectively engage with activities related with foreign tourism such as incoming and outgoing tourism, incoming services, incentive tours, conference/congress tourism, Anatolian tours, excursions, yacht tours and special interest tourism. Preliminary 2004 figures (www.tursab.org.tr 2005) indicate the more or less same development trend in type activities Turkish travel agencies engage. Only fishing tours on which only one travel agency specialise was added to above activity list which show the reluctance and .slowness in development of additional tourism activity areas.

Apart from Anatolian tours, biblical and archaeological tours, thermal tourism, some special tourism types and excursions, most of the remaining activities such as incoming services, conference/congress tourism, yacht tours and incentive tours are realised in coastal provinces of Marmara, Aegean and Mediterranean regions and important centres such as Istanbul, Bursa, Izmir, Aydin, Mugla and Antalya. All these activities engaged and services provided for mainly foreign tourists. Although, there has been a significant development in domestic tourism activities in recent years and the same services and products are also offered for Turkish citizens, concentration on provision of services for foreign visitors indicate the continued neglect of the domestic travel market. As TURSAB (2003) confirms, services provided for domestic tourism market and the share of travel agents who organise tours for Turkish Citizens decreased by 44% in 2002.

Table 2.12 Turkish travel agencies by type of activity, 1998 -2002

Activities of Turkish travel agencies		1998	%	2002	%
Incoming services		**790**	**10.2**	**607**	**5.4**
Incentive tours		**501**	**6.4**	**422**	**3.7**
Congress and meeting organisers		**545**	**7.0**	**510**	**4.5**
Daily tours and excursion organisers		**555**	**7.1**	**526**	**4.7**
Yacht charters		**287**	**3.7**	**321**	**2.8**
Coach tours of Anatolia		**578**	**7.4**	**671**	**5.9**
Domestic services and operations	Tour operators	368	4.7	607	5.4
Ingoing tours		632	8.1	386	3.4
Outgoing tours		468	6.0	377	3.3
Retail activities		445	5.7	314	2.8
TOTAL		**1913**	**24.6**	**1684**	**14.9**
Ticketing	Flight ticketing	610	7.8	NA	
Boat & ferryboat		175	2.3	NA	
Railway tickets		102	1.3	NA	
Intercity coaches		169	2.2	NA	
TOTAL		**1056**	**13.6**	**481**	**4.3**
Active holidays, sports programmes, adventure tours					
Study tours		27	0.3	187	1.7
Biblical tours		41	0.5	331	2.9
Archaeological tours		102	1.3	331	2.9
Trips to fairs and congresses / Business trips		7	0.1	418	3.7
Nature watching / Flora & Fauna / Bird watching		16	0.2	146	1.3
Skiing		22	0.3	230	2.0
Mountaineering		135	1.7	122	1.1
Jeep safari tours		241	3.1	245	2.2
Hunting		100	1.3	16	0.1
Golf		119	1.5	156	1.4
Riding		80	1.0	77	0.7
Bicycle tours		5	0.1	77	0.7
Ballooning		2	0.0	NA	-
Sailing		6	0.1	352	3.1
Scuba diving		24	0.3	193	1,7
Rafting		189	2.4	202	1.8
Trekking		205	2.6	230	2.0
Paragliding		56	0.7	58	0.5
Blue voyage		13	0.2	352	3.1
Thermal / Health		13	0.2	390	3.5
Youth tours				225	2.0
Third-age tours				140	1.2
Hajj & Omra				331	2.9
Cruising holidays				84	0.7
Specialised tours for disabled visitors				69	0.6
Camping Caravanning				53	0.5
Football team camps				10	0.1
Weekend tours				389	3.4
Other special interest tours / sports				210	1.9
TOTAL		**1552**	**18.0**	**5624**	**49.8**
Own a rent-a-car fleet		**149**	**1.9**	**441**	**3.9**
GENERAL TOTAL		**7777**	**100**	**11287**	**100**

Source: TURSAB (1998a) Travel Agencies in Turkey, Istanbul.
TURSAB (2003) Seyahat Acentaları İhtisas Alanlari Anketi-2002 Sonuc Raporu, TURSAB Ar-Ge Departmanı, Ocak, Istanbul

*Most and particularly large travel agencies engage more than one activities
*The 2002 numbers are based on the surveys conducted among TURSAB member travel agencies

Although, special interest tourism activities do not indicate significant shares when examined individually, total share of all special interest tourism activities reaches to 50% in 2002 in overall activities travel agencies engage. The most popular special interest tourism types are identified as sailing-blue voyage (12.5%), biblical and archaeological tours, thermal and health tourism (6.9%), jeep-safari tours (4.4%) trekking (4.1%), white-water rafting (3.6%). Most jeep-safari, trekking, golf, riding and hunting activities are realised in either coastal provinces or regions close to coasts. In contrast, white-water rafting, mountaineering, significant part of archaeological and Anatolian tours are realised in inner provinces of Anatolia and East and North Anatolia.

It is obvious that every single province has something peculiar to offer for the tourism industry. In this respect, significant tourism income might be created in all regions by simply identifying important special interest tourism types for each province, encouraging entrepreneurs in these provinces to make investments and promoting them in national and international tourism markets. It is quite important to stress that customers can easily participate in special interest tourism activities all over Turkey. While special interest tourism activities can be the secondary activity for coastal tourism visitors and for provinces where coastal tourism dominates, they can be the main product for inner regions of Anatolia and participants more time for these products than coastal visitors. Special interest tourism has great importance to develop tourism in inner provinces in particular, create secondary attraction centres close to the coast and attract coastal visitors to interior regions and prolong their length of stay in Turkey. Combination of popular tourism products such as coastal tourism and cultural tourism with special interest tourism activities will also increase visitors' level of pleasure and encourage them to visit Turkey again to participate particularly in special interest tourism. Travel agencies should be encouraged to specialise in particular products and provide excellent services.

Table 2.13 Markets of Top 159 Turkish Travel agencies in 1996

Number of Turkish travel agencies in top 159 which offer services to following countries (1996)									
Market	No	Market	No	Market	No	Market	No	Market	No
Germany	34	Sweden	12	Belgium	6	Far East	3	Taiwan	1
USA	27	France	12	Denmark	5	S. Korea	2	Greece	1
CIS	25	Israel	11	Austria	5	Japan	2	African cou.	1
UK	22	Netherlands	10	Finland	3	Iran	2		
Italy	16	Scandinavia	10	Slovenia	3	Poland	1		
Arab countr.	15	Norway	6	Spain	3	Czech Rep.	1		
Source: TURSAB (Association of Turkish Travel Agencies) (1998a)									

Although up-to-date survey is not available on the following sections, 1996 survey figures were used to put travel agencies' importance to Turkey into perspective which indicates similar trends but considerably higher numbers in volume. Travel agencies generally provide services to most important markets of Turkish tourism which are Germany, CIS, UK and USA. Although, Iran and Romania also occupy important place in foreign visitor arrivals in 1996, while only two of the top

159 travel agency offered services to Iranian visitors, none of them supplied services to Romanian visitors (Table 2.13). This was probably because of frequent coach services between Turkey and Iran, and Romania and therefore easy access by individual travellers and low prosperity level of Romania. Agencies prefer prosperous and developed tourist markets such as Germany, UK and USA. On the other hand, although Japanese visitors known as high spenders in destination countries and less seasonal, not enough attention paid to this and similar other lucrative tourism markets.

Table 2.14 Top 82 agencies by type of activity, number of customers and income

Number of top agencies by activity, number of their customers and income (1996)				
Agency activity	Number of agency		Number of customers	
Incoming services	81	98.8%	3233140	91.1%
Outgoing services	27	32.9%	98450	2.8%
Ingoing services	15	18.3%%	217650	6.1%
Total	82		3549240	
Income over $1m	76		$601478676	
Source: TURSAB (Association of Turkish Travel Agencies) (1998a)				

Table 2.14 shows the distribution of top 82 Turkish travel agencies in 1996 by their main activity and number of customers they served. With the exception of only one company, all other travel agencies deal with incoming services. While 27 out of 82 travel agencies offer outgoing travel services, only 18.3% provides ingoing services to their customers. Top 82 travel agencies served total of 3549240 customers in 1996 and earned around $601.5 million. Significant proportion of their customers was foreign (91.1%). While they served to 3233140 incoming visitors, the number of their outgoing customers was significantly low, 98450. The share of ingoing travellers was only 6.1% in total customers.

As seen, most Turkish travel agencies offer incoming services and only small proportion of them provide outgoing and ingoing services. The low proportion of ingoing and outgoing services can be dedicated to lower income level in Turkey, lack of holiday-taking habits and lack of government support to encourage Turkish people to travel and participate in tourism activities. Therefore, Turkish travel agencies find provision of incoming services more reliable and profitable.

The majority of international visitors have used airways. 72% of foreign visitors arrived to Turkey by air in 2003 while remaining 28% preferred road, sea or railways. In parallel to the increase in the percentage of travellers using airways, the number of Turkey's private and public sector seat capacity have also indicated increase although there were some bad times for airliners, such as earthquakes, terrorist actions and financial crisis. While private sector companies were at service of Turkish tourism industry with 57 planes and 11234 seat capacity, state owned Turkish Airlines had 68 planes and 11317 seat capacity in 2001. These figures considerably increased in 2004 after private companies were allowed to operate in domestic lines in 2002 and private sector reached to

102 planes and 20451 seat capacity in 2004 while Turkish Airlines added 19 planes and reached to 76 planes and 12268 seat capacity.

Table 2.15 Air Transport Facilities and Capacity in Turkey (1992-2004)

	Air Transport Facilities and Capacity in Turkey (1992-2004)			
	Private Sector		Public Sector (Turkish Airlines)	
Year	Plane	Seat	Plane	Seat
1992	40	6273	40	6566
1993	42	7046	58	9275
1994	45	7708	56	9797
1995	57	10278	57	9201
1996	58	11301	62	9869
1997	59	11587	65	9939
1998	63	12236	71	10869
1999	51	10121	72	10620
2000	34	8606	72	11917
2001	57	11234	68	11317
2004	102	20451	76	12268
Source:www.turizmgazetesi.com, www.shgm.gov.tr				

2.8. Spatial disparity in tourism demand

In this section, foreign, Turkish and overall visitor arrivals to Ministry registered accommodation, number of nights spent in these accommodation establishments, average length of stay and occupancy rates are identified by region and province. In addition, foreign tourism demand is examined by identifying purpose of visit, most visited regions and provinces by nation, most important regional and provincial visitor markets by using accommodation statistics in 2000.

Foreign and Turkish visitor arrivals, bednights and average length of stay

Significant percentage of foreign visitor arrivals to and number of nights spent and average length of stay in accommodation establishments recorded in coastal regions and coastal provinces and their share in accommodation arrivals increases year by year (Appendices 1-6). The share of coastal provinces in foreign arrivals increased from 75.8% in 1981 to 88.4% in 2003. In contrast, inner provinces' share which was already small, decreased by around 12.6%. While the share of Marmara and Central Anatolia regions in arrivals to accommodation establishments has continuously decreased through the years, Mediterranean and Aegean regions has displayed an increasing trend and they recorded 70% of overall arrivals in 2003. Black Sea, Eastern Anatolia and South East Anatolia's share remained at very low and variable levels.

The share of coastal provinces in bednights was even higher compared to arrivals and continued increasing between 1981 and 2003. On the other hand, while coastal provinces share in bednights reached to 96%, inner provinces share declined to as low as 4% in 2003. Marmara region had the lion's share from both arrivals and bednights by 1990. However, Marmara left its first rank to

Mediterranean region in 1990 and its share decreased from 60.3% in 1981 to only 12.3% in 2003... As in arrivals, the shares of inner regions including Central Anatolia in bednights were very low.

The visitors' overall length of stay (ALS) in Turkey indicated an increasing trend by 1993, but it showed a sharp decrease in 2000 which was the result of decrease in length of stay in coastal provinces due to several factors such as the capture of the head of terrorist organisation in 1998 and major earthquake in 1999. It should be noted that the largest decreases in foreign ALS were recorded in coastal provinces after major incidents mentioned above. While Marmara remained same and all other inner Anatolian regions increased their foreign ALS figures, Mediterranean and Aegean regions indicated significant decreases from 8.1 and 5.1 nights in 1993 to 5.9 and 4.6 nights in 2003. Despite the decrease in 2000, foreign visitors' ALS in Turkey increased from 2.5 in 1981 to 4.5 nights in 2003. While ALS in inner provinces remained around 2 nights, ALS in coastal provinces increased from 2.8 nights in 1981 to 4.9 nights in 2003 despite. In other words, visitors in coastal provinces stay 3 nights longer than visitors in inner provinces.

The regional ALS indicated some peaks and troughs between 1981 and 2003. However, in general, Mediterranean, Aegean and Marmara regions achieved the longest foreign visitor stays in Turkey. A growing gap was observed between ALS in the regions at first and last ranks. While this difference was 1.8 nights in 1981 between Aegean region and East Anatolia regions, it reached to as high as 4.4 days between Mediterranean region and Black Sea in 2003. It is an unfortunate that significant decreases were recorded in coastal regions of Turkish Riviera in 2003.

Unlike foreign visitors, no significant differences were observed between coastal and inner provinces in terms of percentage of Turkish visitor arrivals to and number of nights spent and average length of stay in accommodation. The share of coastal provinces stabilised around 60%, compared with the inner provinces' share of 40% in arrivals. Marmara region was still on the top rank for Turkish visitors as for the foreign visitors, although its share decreased by 12% through the years. Almost all regions indicated an irregular trend in Turkish visitor arrivals. Marmara, Aegean, Mediterranean and Central Anatolia regions were important destinations for Turkish visitors. Black Sea, Eastern Anatolia and South East Anatolia's share in Turkish arrivals were still at very low levels but much higher than foreign arrivals (Appendix 7).

While there was a slight increase in the share of coastal provinces in Turkish bednights, a small decrease was observed in inner provinces share. Marmara region recorded the highest number of Turkish bednights by 1993, but Mediterranean region took over its first rank in 2003. Turkish visitors tend to take holidays in coastal regions and travel to other places for business purposes. For this reason, while Marmara's share decreased through the years, Mediterranean and Aegean regions' share indicated an increase in Turkish nights. The demand for coastal regions will increase only as domestic demand increases. As in arrivals, the shares of inner regions including Central

Anatolia in bednights were very low. South East and East Anatolia regions are identified as the least preferred regions by Turkish citizens (Appendix 8).

Turkish visitors' overall length of stay (ALS) and ALS in coastal provinces fluctuated around two nights. The ALS in inner regions was recorded as 1.5 nights. The longest stays were recorded in coastal regions, namely in Mediterranean (2.7) and Aegean (2.1) as most Turkish visitors take their holidays in these regions. Unlike coastal regions, most Turkish citizens visit inner provinces for trade and other personal reasons and very small number of Turkish people take holidays in these regions, particularly in spa centres for health reasons. Therefore, ALS in inner regions was shorter than coastal regions. As foreign ALS, Turkish ALS also indicated decreases in all regions in 2003.

Overall visitor arrivals, bednights and average length of stay

The most popular regions in terms of overall arrivals were ranked as Mediterranean, Marmara, Aegean, Central Anatolia. The least popular regions were identified as East Anatolia, South East Anatolia and Black Sea regions respectively. Marmara and Central Anatolia indicated decreasing trend between 1981 and 2003 where as Mediterranean and Aegean regions which are called as Turkish Riviera increased their share in the same period of time. On the other hand, the same result reflected on to the share of coastal provinces in overall arrivals which increased through the years by 10% and reached its peak at 75.6% in 2003 and inner provinces' share which decreased down to 24.4%. In other words, as repeated and confirmed several times in previous sections, overall concentration (foreign and Turkish) has been worsened. Although the number of arrivals to inner regions has increased gradually in parallel to the general tourism development trend, the annual increase trend is much lower compared coastal regions and the gap between the share of coastal and inner regions widens year by year (Appendices 13-18).

Depending on the characteristics of the tourism resources in regions, purpose of visit and attraction factors, number of nights spent and length of stay in regions either increase or decrease. It has been identified that most bednights were recorded in Marmara region by 1987, but since then, Mediterranean and Aegean regions took over its place. The rank order of top regions in bednights and average length of stay has been more or less stabilised since 1990 and realised as Mediterranean, Aegean, Marmara and Central Anatolia respectively. The remaining regions ranks indicate differences through the years. While the share of coastal provinces in bednights raised to as high as 88.5%, inner provinces share indicated continuous decreasing trend, reaching to lowest 11.5% in 2003. Although some irregularity was observed in ALS in coastal regions, it increased from 2.2 nights in 1981 to 3.8 nights in 2003. ALS in coastal regions of Mediterranean and Aegean regions significantly increased in the recent years. However, the ALS in inner regions remained at almost same level, only 1.5 nights.

Occupancy rates

The success of the tourism industry is measured by its productivity which can be the maximum use of its usually perishable products such as beds, chairs and seats. In this section, foreign, Turkish and overall occupation rates for Ministry registered and surveyed accommodation in each region are displayed separately. The occupancy rates were computed by the Ministry and taken from the Bulletin of Accommodation Statistics. Unfortunately, computation of occupancy rates was not done for coastal and inner provinces, but only for regions. The accumulation of foreign occupancy rate with Turkish occupancy rate gives the overall occupancy rate. For example, total of 33.6% foreign occupancy rate and 13.3% Turkish occupancy rate give the 46.9% overall occupancy rate in Turkey in 2003 (Appendices 19-21).

Bed occupancy rates in Turkey indicate fluctuations through the years. However, despite these fluctuations, overall occupancy rate increased from 44% in 1982 to 54.5% in 1997 which mainly resulted from the increase in foreign occupancy rates, but it significantly decreased to 36.8 in 2000 due to reasons mentioned before. However, it increased to 46.9% in 2003 which demonstrates the recovery in the industry. Foreign occupancy rate showed 47% increase in 2003 compared to 1982. In contrast, the share of Turkish occupancy rate in overall occupancy has been decreased. While Turkish occupancy rate was 28.2% which was nearly twice the foreign occupancy rate in 1982, it decreased to 13.3% in 2003 which was nearly 40% lower than foreign occupancy rate. In other words, while the share of foreign occupancy rate in overall occupancy rate has increased, Turkish occupancy rates' share has decreased which shows that the expanding domination of foreign tourism in Turkey in the recent years. This also signals the potential problems in Turkish tourism, in the case of if political, economical and similar problems occur with foreign countries, particularly with European countries. The same attention should be given to domestic market.

Foreign and Turkish occupancy rates

'*Turkish tourism industry faces stiff price competition. If an alternative destination country decreases the prices of its tourism supply, the tourism demand for Turkey will decrease more then the decrease in the price of the alternative destination countries*' (Tosun, 1999, p.232). Despite this competition problem, in general, foreign occupancy rates indicated an increasing trend since 1982 except for 1993 and 2000. Foreign occupancy rates declined dramatically in 1993 and 2000. The rank order of regions in foreign occupancy rates changed in 1990 and more or less stabilised since then. While Marmara attracting most foreigners in the early 1980s, it left its place to Mediterranean region which has showed a surprising performance in increasing its foreign occupancy rates by entertaining most foreign visitors.

Soon after Turkish tourism emerged from serious troubles within the industry caused by the Libya-USA conflict and the Chernobyl nuclear disaster in 1986, which occurred in the middle of successful development progress, the Gulf War started in August, 1990. According to Heath and Wall (1992) the influence of such incidents on potential tourists is does not last very long. However since then all regions tried hard to regain foreign visitor occupancy rates before 1990 and only Mediterranean an Aegean regions managed to regain and excess 1990 figures... The second and third falls in foreign occupancy rates were recorded in 1993 and 2000. The main reason for these dramatic falls were the terrorist bombing in Antalya on 27th June 1993, capture of the head of terrorist organisation in 1998 and earthquake in 1999. As Pizam and Smith (2000, p.124) state '*terrorist acts occurring at tourism destinations have a negative impact on tourism demand*'. Appendix 19 shows that the Mediterranean, Aegean and Marmara regions have achieved the highest foreign occupancy rates reflecting the popularity of primarily coastal and secondarily cultural tourism in Turkey. However, there has been a change in the balance in favour of coastal tourism and higher foreign occupancy rates in Mediterranean and Aegean regions which support this thesis.

However, Turkish occupancy rates indicate a decreasing trend. Black Sea, Central, Eastern and South Eastern Anatolia recorded the highest Turkish and overall occupancy rates as a result of having a relatively small bed capacity and appealing to mainly Turkish and partly foreign visitors. These regions and provinces offer year-round tourism (i.e. cultural, business and health) rather than mass tourism which is concentrated in space and time (Appendix 20). They were not affected by incidents on the national and international scene as much as coastal regions which offer mainly mass tourism products reflecting the importance of domestic tourism in achieving the full utilisation of bed capacity and other tourism resources.

Unfortunately, Mediterranean and Aegean regions, where most foreigners prefer and highest foreign bednights, occupancy rates and ALS were recorded, achieved only 8.0% and 12.9% respectively Turkish occupancy rates in 2003. In the same period, Black Sea 28.1%, South East Anatolia 24.8%, East Anatolia 23.4% and Central Anatolia achieved 23.2% Turkish occupancy rates. Clearly, the Ministry registered qualified accommodation establishments in Mediterranean, Aegean and Marmara regions serve and cater for mostly foreign visitors. Immoral and excessive price policies for Turkish citizens in these regions keep them away from these Ministry registered accommodation and force either not to have holiday in these region, not to have a vacation at all or staying in a cheaper accommodation such as pensions (boarding houses) and municipality registered small lower graded hotels.

The crisis in Turkish tourism industry in 1999 should remind the managers of tourism sector in these regions that;

a) relying on only foreign tourism can be seriously dangerous for the future of the industry
b) more emphasis should be given to develop domestic tourism

c) Ministry registered accommodation should be more accessible for Turkish citizens by abandoning immoral different price polices for foreign and Turkish visitors. For example, while a one week holiday in a Ministry registered seaside hotel in Kemer is $220 for Russian and $280 for German visitors, it rise up to as high as $400 for Turkish citizens.
d) reviewing the marketing policies searching for new and more reliable foreign markets, and providing more opportunities for foreign investors to invest in Turkey which will deter foreign countries to suppress Turkish tourism industry by political and economical blackmailing and these type of threats.

Overall occupancy rates

Overall occupancy rates which represent the combination of foreign and Turkish occupancy rates indicated irregularities between 1982 and 2000. Although it indicated decreases in 1984, 1993 and 2000, overall occupancy rate decreases from 44% in 1982 to 36.8% in 2000 (Appendix 21). In the same period, overall occupancy rates by region fluctuated and rank orders changed through the years. While only single region achieved above 50% overall occupancy rate in 1984, 1990 and 1993, their number increased to three in 1997 which were namely Mediterranean (63.5%), Aegean (54.0%) and Marmara (50%). Black Sea, East and South East Anatolia region's overall occupancy rates remained below 40%. However, all regions overall occupancy rates decreased down to below 50% in 2000.

Although the absence of Turkish visitors were felt strongly in popular coastal regions which caused lower Turkish occupancy rates, high foreign occupancy rates pulled overall occupancy rates up. In contrast, very limited number of foreign visitors in Black Sea and inner Anatolian regions caused lower foreign occupancy rates which pulled overall occupancy rates down in these regions.

Foreign visitors' purpose of visit

According to DIE (1998; 2001) there has been a decline in number of visitors visiting Turkey for cultural purposes, (9.8% and 9.2%), (TURSAB, 2003a) and the decreasing trend continues. However, the share of visitors visiting Turkey for health purposes, VFR, meeting and conventions and shopping have increased indicating the beginning phase of product diversification and demand alterations. Although recent regional figures are not available, DIE (2004) identified that foreign visitors' main purpose of visit to Turkey were Holiday and entertainment (32.4%), shopping (10.9%), VFR (10.7%), business and fairs (9.9%), culture (8.2%), congress, convention and meetings, 3.7%, sports (1.5%), health (0.6%) and religious (0.5%). Only regional data available in terms of foreign visitors purpose of visit was the survey results of Turkish Ministry of Tourism between 1989 and 1993. Although recent data is not available, other figures such as occupancy rates, ALS and bednights give an impression that regional purpose of visit have not changed significantly through the years.

There has been an important change in the regions' share in overall foreign tourism demand. Foreign Visitor Surveys carried out by the Turkish Ministry of Tourism in 1989-1993 were used to evaluate foreign visitors' purpose of visit. Table 2.16, based on the percentage share of the each region in total number of nights spent by foreign visitors, indicates that while Marmara, Central, East and South East Anatolia were loosing market share, the Aegean, Mediterranean and Black Sea regions increased their share as the analysis of regional arrivals, bednights, ALS and occupancy rates proved above. These increases reflect major marketing activities concentrated on coastal tourism products. This is also the result of intensive investment and increasing supply of services and facilities.

Table 2.16 Purpose of visit by region 1989–1993

Region	Marmara		Aegean		Mediterran		C.Anatolia		Black Sea		E.Anatolia		SE.Anatolia	
Purpose	1989	1993	1989	1993	1989	1993	1989	1993	1989	1993	1989	1993	1989	1993
Holiday	28.0	14.7	28.1	40.3	18.7	38.6	11.1	4.14	0.54	1.65	2.49	0.51	1.84	0.09
Cultural	38.5	35.7	26.1	22.4	8.58	22.8	14.1	9.03	0.22	7.89	1.11	1.2	3.93	0.77
Business	35.8	48.8	16.9	17.6	11.8	7.46	27.6	9.85	0.35	11.8	0.19	0.96	3.64	3.61
Meet/Conf.	22.0	34.8	24.8	16.4	38.6	12.8	11.0	14.3	0.4	18.6	0.16	0.97	0.15	0.71
Shopping	48.6	31.4	6.93	4.45	35.0	27.9	6.93	20.2	0.00	8.2	0.6	3.64	0.01	4.14
Religion	26.0	42.5	22.4	9.62	14.3	21.3	10.2	3.55	1.56	15.7	9.59	2.98	1.36	4.35
Visit. Fr&R.	53.9	41.8	16.5	22.8	16.5	20.9	3.28	6.26	0.71	8.98	0.4	0.91	0.17	0.39
Active Sports	23.5	19.5	40.7	46.9	18.3	25.2	4.19	4.12	0.06	3.62	0.94	0.43	0.00	0.17
Health&Spa	22.6	34.3	66.2	4.51	8.11	10.9	2.25	1.65	0.01	45.9	0.32	1.49	0.00	1.21
Mission	47.7	56.1	13.1	25.5	17.6	7.57	15.0	7.45	0.15	3.19	0.23	0.04	2.76	0.16
Education	41.5	35.1	1.97	18.0	0.87	17.9	36.8	26.7	0.14	2.28	0.69	0.00	0.03	0.00
Transit	74.8	6.79	7.42	20.8	2.13	37.2	4.18	33.5	1.02	0.00	1.32	1.79	0.33	0.00
Other	47.2	23.8	16.6	47.1	21.4	11.6	2.97	4.43	1.36	11.2	0.94	1.58	0.53	1.29
Total share	31.9	20.5	25.5	34.7	17.3	32.6	12.8	4.52	0.05	5.89	1.85	0.71	2.04	0.35

* Based on the Foreign Visitor Surveys carried out by the Turkish Ministry of Tourism in 1989-1993

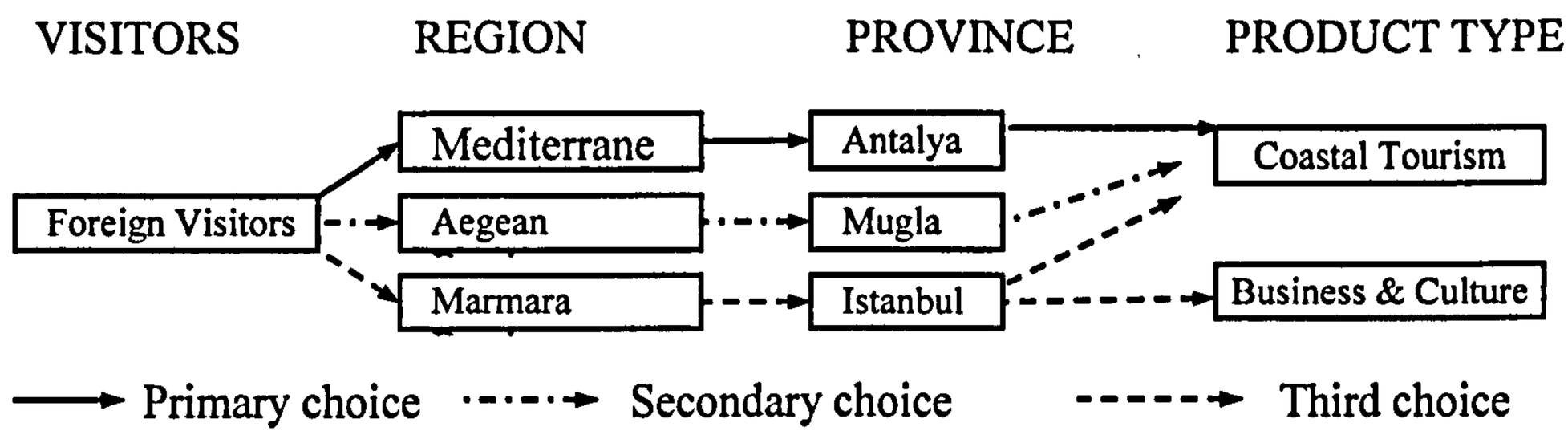
The purpose of visit varies from one region to another with a link between the place of visit and the purpose of visit. The majority of people visit the southern coasts of Turkey for holiday reasons associated with sea, sun and sand holidays in peak season while other parts of Turkey are visited for various purposes all year-round. Apart from the relationship between the place of visit and holiday purpose of visit, no significant relationships between the place visited and other purposes of visit (i.e. cultural and business) have been identified between 1989 and 1993.

Most visited regions and provinces of Turkey by nation

The analysis of most visited regions and provinces of Turkey is based on the visitor arrivals to Ministry registered accommodation. As Appendix 22, 23 and Figure 2.5, 2.6, 2.7 indicate, overall, foreign and Turkish visitors' primary regional choice to visit and spend their holiday was Mediterranean region, Antalya in this region and coastal regions in general. 56.5% of foreign visitors, 26.5% of Turkish visitors and 45.1% of overall visitors preferred Mediterranean region to

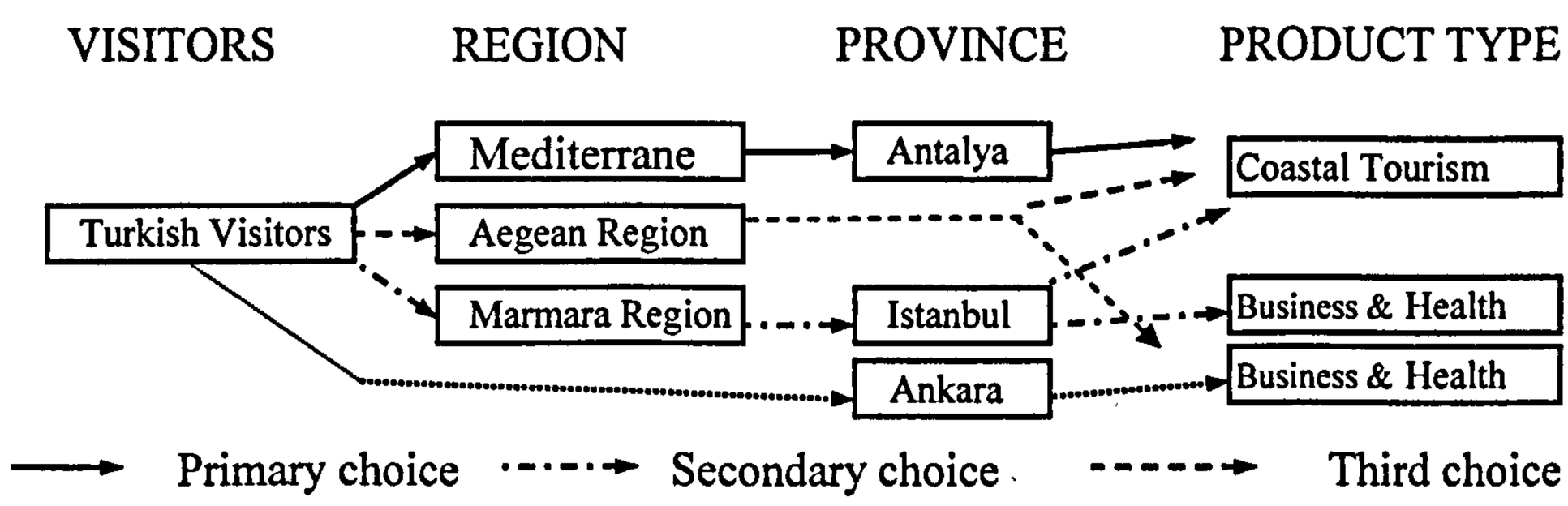
visit. In the mean time, 56.1% of foreign, 21.2% of Turkish and 43.3% of overall visitors' primary provincial choice was Antalya which is located in Mediterranean region. On the other hand, while 95.0 of foreigners preferred visiting coastal provinces, it was 72.1% for Turkish and 86.6% for overall visitors in 2000. In short, foreign and domestic tourism demand focus in coastal provinces such as Antalya, Mugla, Istanbul, Aydin and Izmir, and visitors' regional preference seems clearly to be Mediterranean region and Antalya in this region. Although the results of the analysis reflect the general outlook in 2000, there has not been much difference in 2004. The proportion of visitors visiting different regions were identified as follows; Mediterranean (36.3%), Marmara (33.9%), Aegean (20.3%), East Anatolia (%3.6), South East Anatolia (2.4%), Central Anatolia (2.1%), and Black Sea (1.5%) (www.turizmdebusabah.com, 2005).

Figure 2.5 Regional choice of foreign visitors, 2000



Significant domination of coastal tourism and concentration of tourism in coastal regions has increased in Turkey which worsens the imbalance between regions. Intensive efforts are needed to attract both foreign and Turkish visitors to interior regions to improve imbalance. Mediterranean and Aegean regions and Antalya and Mugla in these regions are mainly preferred for holiday purposes. However, the purpose of visit in Marmara region and Istanbul varies from business, culture and conferences to sport activities and visiting friends and relatives.

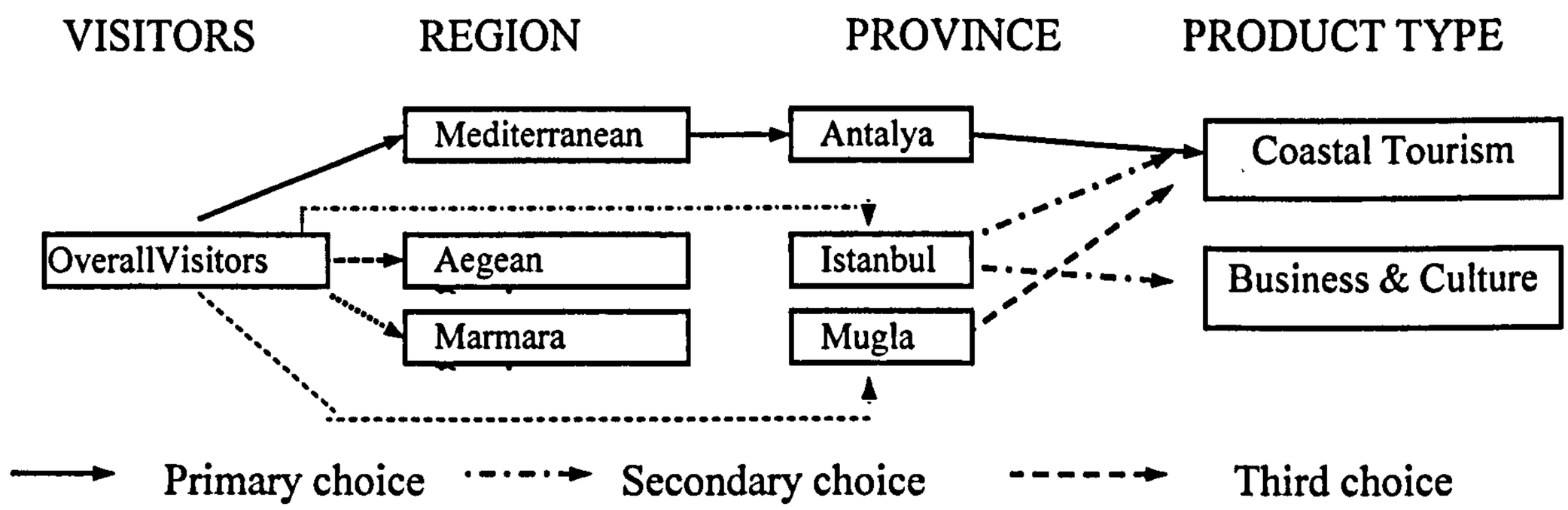
Figure 2.6 Regional choice of Turkish visitors, 2000



Turkish visitors' regional and provincial preferences indicate differences in second and third ranks compared to foreign visitors. After Mediterranean region and Antalya in this region, most Turkish visitor arrivals were recorded in Marmara and Istanbul in Marmara. Although, third important region was Aegean region, Ankara in Central Anatolia was identified as third province preferred by Turkish citizens. While most Turkish citizens visit Antalya for holiday purposes, they visit Istanbul for mainly business, trade and cultural purposes, and Ankara for business, official works and to receive health treatment in large university and private hospitals (Figure 2.6).

While Mediterranean, Aegean and Marmara regions respectively identified as most preferred regions by overall visitors which is same as foreign preferences in 2000, the rank order of provincial preferences indicated a small difference and realised as Antalya, Istanbul and Mugla respectively. To sum up, whatever the rank order is, tourism demand concentrates in three regions, namely in Mediterranean, Aegean and Marmara regions, and Antalya, Mugla and Istanbul which are all coastal provinces. Apart from Istanbul which is a cosmopolitan and exotic city and therefore purpose of visit varies, Antalya and Mugla are visited mainly for coastal tourism and holiday purposes (Figure 2.7).

Figure 2.7 Regional choice of overall visitors, 2000



Most important regional and provincial visitor markets

Analysis of the most important regional and provincial visitor markets is based on the number of nights spent in Ministry registered accommodation. When one looks at the main markets of the regions and provinces within these regions, their market place concentrates in European countries. Only a few countries, namely USA, Japan and CIS (Commonwealth Independent States) and in some cases Australia, Saudi Arabia, Iran, Iraq and Syria managed to have a place in top ten markets of regions. The main markets of Turkey identified as Germany, CIS, Benelux countries, Britain, France, Austria, USA, Italy, Scandinavia and Japan. However, Germany's share in the nights spent in Turkey which was 38.4 % was significantly greater than other markets in top ten. CIS, Benelux countries, Britain, France and Austria follows Germany with 11.1%, 9.0%, 6.7%, 6.6% and 4.6% respectively in 2000. USA, Italy, Scandinavian countries and Japan's share remained below 3%. In

other words, first 6 markets of Turkey formed the 76.4% of nights spend in Turkey in 2000 of which 38.4% belongs to Germany alone (Appendix 25).

On the other hand, although, except for few exceptions, similar countries occupied the first ten ranks, different ranking order was observed between inner and coastal provinces, and between regions of Turkey. Germany (36.9 %), CIS (10.9%), Benelux countries (9.3%), Britain (6.9%), France (6.3%) and Austria (4.8%) were the main tourist market for coastal provinces and CIS (16.1%), Germany (15.9%), France (12.5%), USA (10.2%), Japan (9.6%), Italy (4.8%) were identified as important markets for inner provinces. It should be noted that there were two markets from outside Europe among important markets of inner provinces which were namely Japan and USA. Although its share in total bednights is small, Japan is an important and lucrative market for particularly inner provinces with rich natural and cultural resources and it is less seasonal compared to European tourist markets. While CIS was on second rank in overall bednights in Turkey and in bednights recorded in coastal provinces, it was on the first rank in bednights recorded in inner provinces due to most visitors from CIS visit inner regions for trading purposes. Spain and Iran were other worth noting tourist markets of inner provinces of Turkey.

Germany three and CIS was the most important tourist market for remaining four regions. While Mediterranean, Aegean and South East Anatolia regions' most important market was Germany, it was CIS for East Anatolia, Black Sea, Marmara and Central Anatolia regions. It is worth noting that distribution of bednights between important markets of Marmara and Central Anatolia regions was much even and the gap between markets' share in regional total was narrow compared to other regions. In contrast there was a great concentration of German visitors in Mediterranean where 54.8% of total bednights realised by German visitors. The Black Sea region, due to its closeness to CIS border, was also concentration point for visitors from CIS (62.1%). Concentration was spread on to several markets in Marmara, Central Anatolia and East Anatolia regions instead of single market (Appendix 25).

When provincial visitor markets are analysed, Romania dominate provinces in Black Sea and Istanbul. While German tourist market was the primary market for most provinces in different regions, Japan for provinces which have rich historic, religious and natural resources such as Bolu, Izmir, Cankiri, Nevsehir, Aksaray where fairy chimneys are located, Saudi Arabia for Konya, the centre for whirling dervishes and a few provinces in Western Black Sea and USA for Central and Eastern Anatolia provinces were important markets (Appendix 24).

Concentration of markets in a single or a few countries brings the significant risks together and necessity to be over cautious and vigilant in mutual relationships. The breakdown of good relationship between Turkey and these countries, political, economical crisis, disagreements and incidents affect tourism industry and consequently Turkish economy directly and can cause drastic falls in tourism demand from these countries. For example, worsening political relationship

between European Union, Germany, Italy and some other countries and Turkey, high volume political pressure from EU, terrorist incidents in European countries against Turkey, EU's tourism policy and advice and encourage its citizens to travel within EU and finally global economical crisis caused significant decreases in number of arrivals from European countries and tourism income in 1999. Therefore diversification of market places, promotion of Turkey in more stable and potentially lucrative and quality markets have become essential for healthy development of tourism in Turkey. Japan, Saudi Arabia and USA can be the first markets to be attracted in the first instance in new market diversification and product development to eliminate possible risks. It is important to evaluate this ranking for coastal and inner regions and use this information to develop and sustain tourism activities and movements in inner provinces in order to improve regional as well as seasonal imbalance in Turkey.

Regional and provincial average length of stay by nation

The analysis of visitors' average length of stay (ALS) in regions and provinces indicated considerable similarities. However, in some cases, although the number of nights spent by a nation in a particular region or province was rather low, the ALS of that nation in that region or province was quite high, or vice versa. In average, while overall visitors spent 2.9 nights in Ministry registered accommodation in Turkey in 2000, it was 4.2 nights for foreign visitors and 1.9 nights for Turkish visitors. On the other hand, the overall ALS in coastal provinces was 3.4 nights where it was only 1.5 nights for inner provinces. The foreign and Turkish visitors spent similar amount of time in inner provinces, 1.6 nights. However, it was identified that, the time spent by foreigners in coastal provinces was more than double the amount of time spent by Turkish visitors, 4.6 and 2.1 nights.

On the regional base, the longest stays were recorded in Mediterranean (5.0) and Aegean regions (3.0) and they are followed by Marmara (1.9) and Central Anatolia (1.6). The overall ALS in Black Sea, East and South East Anatolia was around 1.5 nights. It was quite interesting to observe that except for Mediterranean and Aegean regions, the difference between the foreign and Turkish ALS was very small or almost same. However, there were great differences in foreign and Turkish ALS in Mediterranean and Aegean regions. While foreign visitors spent around 6.4 nights in Mediterranean and 4.3 nights in Aegean region, Turkish visitors ALS in these regions were rather low, 2.7 and 2.0 nights respectively (Appendix 27).

Except for visitors from CIS, who spent the large part of their time in Central Anatolia, almost all visitors from all over the world including Turkish visitors spent longer time in coastal regions than in inner regions. Most European, Scandinavian and Benelux countries prefer staying longer usually in Mediterranean and Aegean regions. Visitors from Spain, Greece, stayed longer in Marmara region while visitors from Japan recorded longest stays in Black Sea region.

On the provincial base, the longest overall, foreign and Turkish stays were recorded in Antalya, Mugla, Aydin, Kirsehir and Kirklareli. The ALS for overall visitors was 5.5 nights in Antalya, 4.0 nights in Mugla and 3.9 nights in Kirsehir. On the other hand, while foreign longest stays were recorded 6.5 nights in Antalya, 6.1 nights in Mugla, 5.5 nights in Aydin, the ALS for Turkish citizens were lower and realised as 3.9 nights in Kirsehir, 3.3 nights in Antalya, 2.7 nights in Kirklareli 2000 (Appendix 26).

It was clearly seen that the longest stays were realised in provinces on Aegean and Mediterranean coasts, lining between Antalya on the south and Balikesir in North Aegean. In other words, visitors spend longer time in holiday resorts on the seaside. On the other hand, while Western countries spent longest time in coastal provinces, the longest ALS in inner regions and provinces were realised by visitors from Asian, Middle Eastern and East European countries. Therefore, the ALS figures give an important clue on that which markets should be develop in which regions and provinces so that regional imbalance can be improved.

2.9. The importance of tourism in the regions

Defert's Tourist Function Index (DTFI)

'*Defert's Tourist Function Index (DTFI) compares the number of tourist beds available in a destination to the total number of residents, or hosts, in the region*' (Boniface and Cooper, 1987, p.6) and is expressed as;

$$T(f) = \frac{\text{(Bed Capacity X 100)}}{\text{Resident Population.}}$$

'*A value of 100 indicates that the number of tourists would equal the number of local residents, assuming all beds available were being used*' (Pearce, 1995, p.84). While the value of zero indicates that there is no accommodation available in a given area, infinite value shows that nobody reside in that region. Boyer (1972) and Pearce (1995) grouped tourism regions in six categories according to their DTFI values as follows:

T (f) >500	=	recent 'hypertouristic' resort
T (f) 100-500	=	large tourist resort
T (f) 40-100	=	predominantly tourist commune
T (f) 10-40	=	communes with an important but not predominant tourist activity
T (f) 4-10	=	little tourist activity or tourist function 'submerged' in other urban functions
T (f) < 4	=	practically no tourist activity

To gain insight into the significance of tourism industry within the seven regions, coastal and inner regions and all provinces, DTFI was computed. Considering the above classification, all DTFI values for each region on Table 2.17 are under 1.00, except for the Mediterranean and Aegean regions in 2001 and 2003, which means despite speedy development and the increasing importance of tourism in Turkey, its significance is not felt strongly enough in the Turkish economy in general. It is understood that tourism is only one economic activity among many others and some other industries such as manufacturing and agriculture occupies important place in Turkey's economy. None of the regions have been able to become large tourism destinations according to DTFI values. However, there has been a large increase in some region and province DTFI values (Table 2.17, 2.17).

The bed capacity in Antalya, in Mediterranean region, in Mugla and Aydin, in Aegean region, and in Nevsehir, in Central Anatolia, has shown a steady increase and most of the top ten provinces are located in the coastal areas and have above-average DTFI values (Table2.17). The DTFI values have reached to as high as 9.5 in Antalya and 9.2 in Mugla in 2003 well above overall DTFI value for Turkey which is only 0.62. The shift from cultural centres towards coastal holiday resorts can clearly be seen again by comparing the importance of tourism in coastal provinces (1.10) and in provinces located in inner regions (only 0.17) in 2003 (Table 2.17).

However, there are some shortcomings of this method. Number of resident population plays an important role and while the DTFI value of densely populated larger regions or provinces could indicate smaller values despite the large number of beds, regions or provinces where the number of resident population lesser and more polarised may indicate significantly higher DTFI values despite smaller bed capacity. Therefore it is difficult to make clear comparisons between regions or provinces. In addition, this measurement technique assumes that all beds available are occupied and includes the empty bed capacity in calculation which does not reflect the actual importance of tourism in a given region.

Tourism Intensity Index

To exclude these shortcomings, Plettner (1979) proposed a formula which employs number of nights spent in a given region rather than bed capacity and compares the number of nights spent by visitors with the resident population. If the number of nights spent in a region equals to the resident population, the Tourism Intensity Index (TII) should be 100. When bednights exceeds the resident population TII value should increase and have a value over 100, and it should decrease and have a value below 100 if bednights are below the number of resident population.

$$\text{Overall Tourism Intensity Index (OTII)} = \frac{\text{(Number of nights spent X 100)}}{\text{Number of resident population}}$$

Some other detailed formulas can be derived from Plettner's formula as follows to indicate the degree of importance of international and domestic tourism in the region:

$$\text{Foreign Tourism Intensity Index (FTII)} = \frac{\text{(No of nights spent by foreign visitors X 100)}}{\text{Number of resident population}}$$

$$\text{Turkish Tourism Intensity Index (TTII)} = \frac{\text{(No of nights spent by Turkish visitors X 100)}}{\text{Number of resident population}}$$

Overall Tourism Intensity Index (OTII)

Appendix 28 and 29 give the results of computation of Overall Tourism Intensity Index (OTII) by each region and top ten provinces which include all Turkish and foreign bednights. Once again, except for the OTII values of Mediterranean and Aegean regions together with coastal provinces in 2000 and 2003, all other regions' OTII value under 100 and even in some cases below 10 between 1985 and 2003. The latest overall OTII value for Turkey in 2003 was only 84.2 which means the number of bednights recorded in Turkey was nearly 18.8% lower than the resident population which was nearly 68 millions. While costal provinces OTII value managed to exceed 100 and reach to 110.1 in 2000 and 142.7 in 2003, it was just 23.2 and 26.74 respectively for inner provinces indicating the excessive gap between coastal and inner regions in tourism activities.

The regional OTII values also demonstrate the greater imbalance. Although all regions' OTII value increased in 2003 compared to 1990 values, while OTII values of Mediterranean and Aegean increased by 261% and 156% respectively, the increase rate in remaining regions ranged between 16% in Marmara to 92% in Black Sea region. In other words, while Mediterranean and Aegean regions OTII values reached to as high as 324.7 and 159.1 in 2003, East and South East Anatolia's values were just reached to only 9%. While the importance of tourism in Aegean and Mediterranean coasts has increased significantly through the years and tourism industry provides great contribution to the regional economy, tourism industry's importance and contribution was almost negligible in Black Sea, East and South East Anatolia regions. Although Marmara region receives important section of the visitor arrivals, its OTII value remained below 100 and achieved the lowest increase rate in 2003 by reaching to 51.4 % indicating the shift of visitor bednights towards coastal regions.

On the provincial base, Antalya, Mugla leads the most favourite top ten provinces between 1985 and 2003 and they performed extraordinary development in terms of their OTII values. While Antalya's OTII value increased from 162.5 in 1985 to 1590.6 in 2000 which represents 878% increase, Mugla achieved to increase its OTII value by 667.5% from 140 to 1074.4 in the same period. The top ten ranks were occupied by almost same provinces between 1985 and 2003 with a few changes. While Bursa and Ankara went out of the top ten, Canakkale and Denizli replaced their place in 2003.

Table 2.17 DTFI Values by region

	The change in Defert's Tourist Function Index (DTFI) by regions and years									
	Marmara	Aegean	Mediterranean.	Central Anatolia	Black Sea	East Anatolia	S.East Anatolia	TOTAL	Coastal regions	Inner regions
1985	0.29	0.33	0.22	0.12	0.04	0.05	0.04	0.17	0.27	0.08
1990	0.33	0.60	0.79	0.18	0.06	0.05	0.05	0.31	0.51	0.11
2001	0.40	1.22	1.65	0.22	0.12	0.10	0.09	0.55	0.97	0.15
2003	0.42	1.34	2.01	0.25	0.14	0.11	0.09	0.62	1.10	0.17
	* Calculations are based on the 1985, 1990 and 2000 General Population Surveys in Turkey									

Table 2.18 DTFI values by provinces, 1985-2003

The change in top ten Defert's Tourist Function Index (DTFI) by provinces and years																	
1985				1990				2001				2003			
Rank	Province	Region	DTFI value	Rank	Province	Region	DTFI value	Rank	Province	Region	DTFI value	Rank	Province	Region	DTFI value
1	Mugla	Aegean	1.57	1	Antalya	Mediterranean.	4.18	1	Mugla	Aegean	7.92	1	Antalya	Mediterranean.	9.51
2	Antalya	Mediterranean	1.02	2	Mugla	Aegean	3.51	2	Antalya	Mediterranean.	7.78	2	Mugla	Aegean	9.27
3	Aydin	Aegean	0.70	3	Nevsehir	C.Anatolia	1.51	3	Nevsehir	C.Anatolia	2.49	3	Nevsehir	Black Sea	2.37
4	Nevsehir	C.Anatolia	0.61	4	Aydin	Aegean	1.31	4	Aydin	Aegean	2.16	4	Aydin	Aegean	2.31
5	Balikesir	Marmara	0.53	5	Balikesir	Marmara	0.66	5	Bolu	Black Sea	1.13	5	Bolu	Black Sea	1.19
6	Bursa	Marmara	0.40	6	Bursa	Marmara	0.44	6	Balikesir	Marmara	0.72	6	Balikesir	Marmara	0.76
7	Izmir	Aegean	0.34	7	Izmir	Aegean	0.43	7	Izmir	Aegean	0.72	7	Izmir	Aegean	0.71
8	Istanbul	Marmara	0.31	8	Bolu	Black Sea	0.37	8	Denizli	Aegean	0.53	8	Denizli	Aegean	0.56
9	Edirne	Marmara	0.29	9	Istanbul	Marmara	0.36	9	Istanbul	Marmara	0.49	9	Canakkale	Marmara	0.54
10	Tekirdag	Marmara	0.26	10	Edirne	Marmara	0.34	10	Canakkale	Marmara	0.44	10	Istanbul	Marmara	0.51
* Calculations are based on the 1985, 1990 and 2000 General Population Surveys in Turkey															

As Appendix 29 demonstrates, bednights concentrated only one province in Mediterranean (Antalya), Central Anatolia (Nevsehir) and Black Sea regions (Bolu). In contrast, it was much polarised in Aegean (Mugla, Aydin, Denizli, Izmir) and Marmara regions (Istanbul, Canakkale, Balikesir). However, except for, Bolu in Black Sea, Nevsehir in Central Anatolia and Denizli in Aegean region which were located in interior regions, all of the remaining provinces in top ten in terms of OTII values were located on Marmara, Aegean and Mediterranean coasts. It is sad to see that no provinces from East and South East Anatolia achieved to enter in top ten between 1985 and 2003.

Foreign and Turkish Tourism Intensity Index (FTII and TTII)

Foreign visitors' concentration was mainly in Mediterranean region in 2003 and only Mediterranean and Aegean's FTII values exceeded 100 in 2003. Except for Black Sea region where FTII value declined, all the remaining regions' FTII values exhibited increase in 2003, compared to 2000. In contrast to Mediterranean region where FTII value reached its and Turkey's maximum level at 279.3, East and South East Anatolia's values achieved only 0.90 and 0.45 respectively which widened the gap. Although overall FTII value increased by 43.3% in 2003, it could not manage to reach 100 and remained at 60.3 level (Appendix 30, 31).

The top ten provinces indicated significant changes between 1985 and 2003 in terms of FTII values and rankings. While, Balikesir and Bursa in Marmara, Bolu in Black Sea region went out of top ten, Denizli regained its position and Artvin in Black Sea and Ankara in Central Anatolia managed to find a place in top ten. Mediterranean and Aegean regions broke serious records in their FTII values. While Antalya achieved to expand its FTII value from 130 in 1985 to 1404 in 2003 which represents around 980% growth, Mugla performed 924% increase and got much closer to Antalya. As noticed, foreign visitors preferred staying mainly in coastal provinces. The only inner province which exceeded 100 was Nevsehir in Central Anatolia where is known with its unusual rock formations and very old churches carved into the rocks. Entrance of three new provinces into top ten which are namely Denizli where Pamukkale, Cotton Castle, is located, Ankara, the Capital, and Artvin on the Black Sea coast, where natural tourism and white-water rafting has become most important attraction factors in the region is appreciated.

On the other hand, as Appendix 32 and 33 shows clearly Turkish Tourism Intensity Index values (TTII) significantly lower than Foreign Tourism Intensity Index values (FTII) and only two provinces in 2003, namely Antalya, Mugla and Nevsehir, could exceed 100. While coastal provinces scored 32.4 in 2003, it was only 15.6 in inner provinces. The favourite regions were identified as Mediterranean (45.4), Aegean (43.8), Marmara (22.5), Central Anatolia (19.2) and Black Sea (14.1) regions respectively. It is worth noting that the TTII values of popular regions and

coastal regions indicated decline in 2003 demonstrating that Turkish visitors are staying away from those regions.

Although regional and provincial TTII values indicated significant increase between 1985 and 2003, intensity of Turkish visitors in regions and provinces were not as high as expected and as intensity of foreign visitors. While Antalya in Mediterranean region (198.3), Mugla in Aegean region and Nevsehir's TTII value in Central Anatolia exceeded 100, others remained below average. In other words, only Antalya, Mugla and Nevsehir in 81 provinces exhibited above average performance in terms of Turkish Tourism Intensity Index values which proved the concentration of domestic tourism as well as international tourism in few and most popular coastal and cultural provinces. Only Nevsehir in Central Anatolia, Bolu and Sinop in Black Sea, Denizli in Aegean region and Tunceli in East Anatolia which are located in inner regions were able to take their places in top ten TTII values in 2003.

2.10. Seasonality in Turkish tourism

In this section, seasonality in Turkish tourism is analysed from different perspectives. It is obviously not enough to make appropriate conclusions and future decisions only looking at the seasonal factors of overall tourist arrivals. In order to get more detailed insight into the seasonality problem, arrivals from each individual tourist generating country and by each means of transport should be analysed. Overall data were analysed by overall visitor arrivals, overall tourism receipts, average receipts per visitor, by regions and countries, and by mode of transport. The data related to Ministry of Tourism registered accommodation establishments and staff was analysed at overall, regional and provincial level to find out most and least seasonal areas of the country in terms of visitor arrivals, number of nights spent, number of permanent and temporary staff and average length of stay in Ministry of Tourism registered accommodation establishments. The accommodation establishments registered with local municipalities were not analysed because of lack of data available.

It would be better if the statistical information available on arrivals to each individual region or province for a longer time of period to determine and implement effective strategies and actions in order to improve seasonality. However, seasonality in Turkish tourism is generally analysed at a national level by using statistics between 1980 and 2000, only three years of regional and provincial statistical information, 1994-1996, is analysed due to lack of relevant regional and provincial information going back to earlier years and between 1997-2004. Despite the lack of data, analysis indicated significant seasonal imbalance between provinces and regions of Turkey.

Tourism facilities and services have to be planned and supplied to match demand for these services and facilities. The capacity over demand is wasted and inadequate capacity also leads to wastage of

consumer demand and customer dissatisfaction. It is necessary to know the historical trend, peaks and troughs in demand so that adequate capacity is supplied to meet demand at different times of year and benefits are maximised from tourism movements. Therefore, analysis of past data is important and time series and X11ARIMA models are employed the explore seasonality in Turkish tourism in the following sections.

The Time Series Analysis

This study presents a largely non-mathematical account of the principal methods of analysis and trends, using SPSS (Statistical Package for Social Sciences), and the time series analysis. The X11ARIMA (Autoregressive Integrated Moving Average) multiplicative monthly seasonal adjustment model is employed to interpret seasonality in Turkish tourism. Instead of complete results of the analysis, only original monthly series, monthly final seasonal factors and final seasonally adjusted monthly series are placed in the study. Statistical and technical issues of measurement of seasonality are set aside in the study which intends to focus only on the final results important for fulfilling the aims and objectives of the study.

As Lundberg et al. (1995) state if future developments regarded as a function of the past, time series models are best to predict future by utilising historical data. BarOn (1975) describes the previous version of X11ARIMA which was developed and used in 1960s as the most important programme for the analysis of monthly and quarterly economic series and he stresses that although 36 months' data is enough for computation, it is desirable to have data for at least five years in order to provide an adequate picture of the seasonality. This study used the data at least for 15 years to 24 years.

However, the most important weakness of these models is that significant and sharp changes in the future would make the future predictions invalid or less reliable. As Murdick et al. (1990) warns new factors in the future can make the results found invalid.

In practice, tourism authorities and practitioners know the length of the peak- and off-season and seasonal fluctuations in visitor arrivals by simply experience and by checking the statistics on visitor arrivals. However, statistics on visitor arrivals alone are not enough to understand the real extent of the problem. Time series analysis helps the industry to see and explain the past behaviour of the visitor arrivals and large fluctuations, evaluate the effects of some certain events and forecast future business trends successfully. The first step for achieving a successful business future is to identify seasonal patterns and whether they indicate regular, irregular, improving trends and what causes the fluctuations. After identification process, the second step is to forecast future trends and find solutions, if the forecasted trends are not as desired, to smooth the business operations and spread over time as equal as possible.

Seasonal Factor or Index represents a number quantifying the net effect of a given period in a season on the level of a series. In the following time series analysis, monthly seasonal factors (indices) have different values for each month. If value of seasonal factors for each month in a given year is equals to 100, it means there is no seasonality whatsoever. The values greater than 100 means seasonal factors pushes the series, i.e. monthly arrivals, above the level of trend and concentration occurs in these months. In contrast, the values less than 100 indicates that seasonal factors pushes the series below the level of trend and significant decreases are seen in the value of series, i.e. monthly arrivals. In the study, seasonal factors 100 ±5, in other words seasonal factors between 95 and 105, are accepted as mean and the months which have seasonal factors above 95 included in the peak season.

The analysis of overall data

Seasonality of overall visitor arrivals (1980-2003)

The results of the time series analysis between 1980 and 2000 indicate that the main peak-season in Turkish tourism is the time period between May and October (Table 2.19, Figure 2.8). Tourist arrivals to Turkey peak in August. April, November and March were respectively identified as shoulder months. Although April's seasonal factor is closer to mean index which is 100 and primary candidate to become seventh month of the 7-month peak season, there has been a decrease in the April's seasonal factor since 1990, despite a recovery attempt to regain its previously higher place. April's seasonal factor decreased from 95.3 in 1990 to 84.1 in 2003 (Appendix 35). Appendix 36 predicts no change in April's seasonal factor in 2004 which signals that emergency measures to be taken to increase in arrivals in April so that include April in the peak season months. In contrast to April, December and January which recorded decrease in their seasonal factors, off-season months of February, March and November remained stable.

Although, there is an improvement in seasonality and decline in concentration in May, and August, an increasing seasonal pattern has been seen in tourist arrivals in June and July. As tourism is a relatively recent phenomenon and development in Turkey, it can be said that seasonality is still in control compared to some other countries. Compared to 6 or 6.5 months of peak season in Turkey between the second half of April and October, Greece and Italy's peak season one month (May-September), Spain, and former Yugoslavia's peak season two months (June-September) shorter than the length of peak season in Turkey. On the other hand, although Portugal has 6 month peak season, Portugal's peak season starts in April and ends in September. In other words, peak season starts one month earlier and ends one month earlier than Turkey (Drakatos 1987). Donatos and Zairis (1991) identified the Greek Islands' peak season as May to October which is one month longer than Greece's peak season. Zaharatos and Tsartas (1998) and Beritas (2002) state that the

demand in Greek Islands is characterised by strong seasonality ranging between 2 and 7 months.

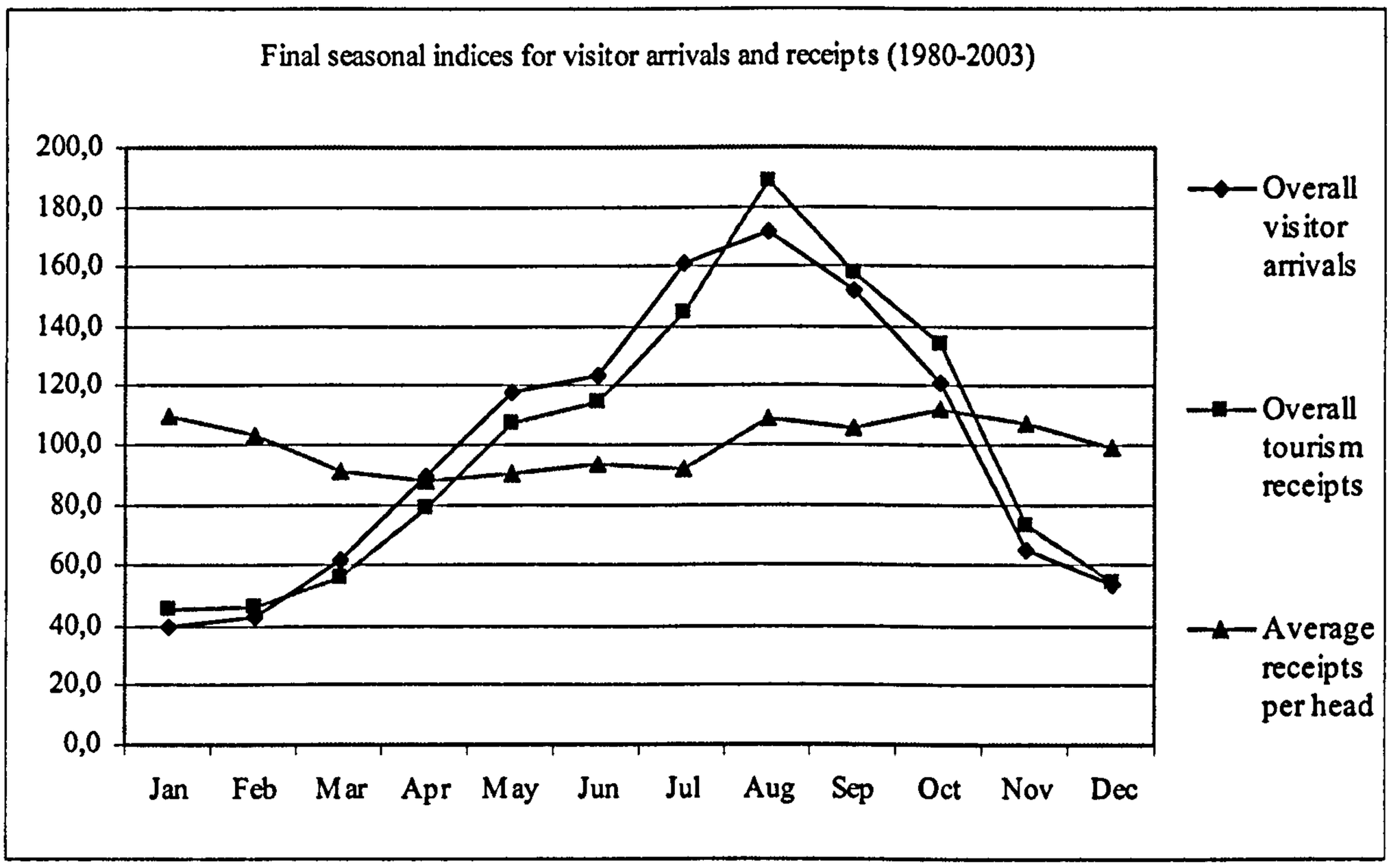
Seasonality of overall tourism receipts (1980-2003)

The economic effects of tourism on national economies are well-known. Each country wants to earn as high tourism income as possible and high-spending visitor markets are preferred. In this respect, quality comes forward rather than quantity and destination countries can earn more currency by targeting fewer but higher income visitor segments. Analysis of tourist arrivals is not enough to explain the real effects of seasonal fluctuations in demand and tourism receipts and receipts per visitor are also to be analysed. Arrivals may indicate significant fluctuations but overall tourism receipts or receipts per visitor may not indicate significant fluctuations or may indicate different trends than overall arrivals. For example, if high spenders visit a destination in off-season and the demand for that destination, visitor arrivals, is at its lowest level, seasonality analysis of receipts per visitor and visitor arrivals indicate different trends and stress the importance of quality of markets rather than quantity.

This is proved by the analysis of tourism receipts of Turkey. No similar analyses were seen in the literature on seasonal analysis of receipts and receipts per visitor. Although, seasonal patterns of visitor arrivals and overall tourism receipts indicated similar seasonal trends, a striking difference has been seen between the overall seasonal visitor arrivals and overall tourism receipts and the seasonal patterns in receipts per individual tourists (Table 2.19, Figure 2.8). As well as late peak season months August, September and October, concentration of receipts per visitor also recorded in off-season, between November and February. This difference indicates the importance of quality of customers rather than quantity. In real terms, the money earned from an individual visitor in actual 4 months of the off-season (January, February, November and December) is much greater than the money spent by a visitor during the most months of peak season which reflects the domination of cheap and mass tour operation in peak season. Very cheap tour operations, in particular, in May, June and July pull seasonal indices for visitor expenditures per head to it minimum levels.

However, future prediction does not look so promising with declining receipts per visitor in off-season compared to peak season since 1992 and worsening seasonal trend and higher seasonal concentration in peak season is projected (Appendix 40, 41, 42). In other words, there has been an increased domination of peak season visitors' expenditures and cheaper mass tourism in Turkey in the recent years, but there is a necessity to stop further deterioration seasonal trend in off-season. It is good to observe that the quality and the level of expenditures of peak season visitors is improving, but also sad to see that it is getting worse in off-season. However, in general, seasonal factors of receipts per tourists indicate rather smooth trend throughout the year.

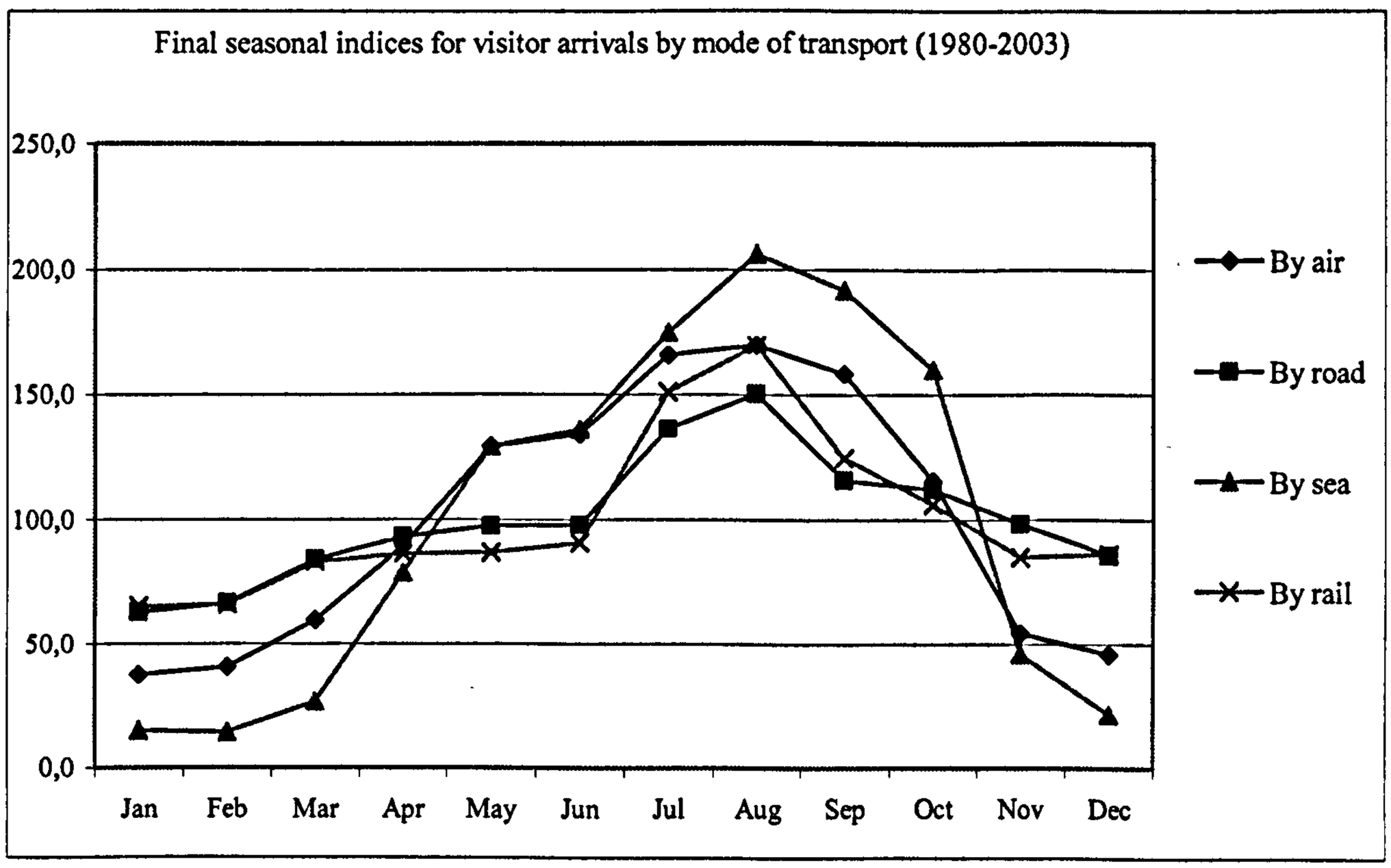
Figure 2.8 Final seasonal indices for visitor arrivals and receipts (1980-2003)



Seasonality of visitor arrivals by mode of transport

In the study, analysis of tourist arrivals from major important tourism markets and by air, road, sea and rail indicated different seasonal patterns. As a majority of tourists, 71.9% in 2003, arrived by air, there is a great similarity between the overall seasonal pattern of tourist arrivals and the seasonal patterns of arrivals by air.

Figure 2.9 Final seasonal indices for visitor arrivals by mode of transport (1980-2003)



While arrivals by air and sea have 6-month and arrivals by road 7-month peak season, arrivals by rail demonstrates shorter peak season, 4-month. In general, arrivals by road and railways display smaller seasonal fluctuations. Air arrivals and expectedly arrivals by sea showed higher concentration between May and October and significantly sharp falls in the remaining months While arrivals by air and sea is predominantly related to holiday and business tourism, arrivals by rail and particularly road is related to VFR and shopping from neighbouring countries (Figure 2.9, Appendix 43-54).

Since almost three quarters of total visitors arrive Turkey by air and Turkish tourism industry heavily depends on arrivals by air, important measures are needed to improve overall seasonal pattern in air arrivals. Improvements in seasonal pattern of air arrivals will automatically be reflected to overall arrivals to Turkey and either peak-season will be prolonged or shoulder seasons will be strengthened. Attractive off-season travel opportunities offered by airline companies, tour operators and the industry in Turkey could help to improve seasonal concentration.

Seasonality of visitor arrivals by regions

Regional analysis of tourist arrivals from OECD countries, Europe, America, Asia and Africa indicate that tourist arrivals concentrate in the peak summer season. While the length of peak season for arrivals from European OECD countries, Non-European OECD countries and Latin America is 6 months long (May-October), the concentration takes place in five months in arrivals from Asian countries (Table 2.19). However, seasonal trends in arrivals from Asia, Africa and Eastern Europe are much smoother than the arrivals from other regions. Arrivals from mainly Eastern European and other central and northern European independent countries exceeds nearly 8-month season from April to November which could be the best visitor markets to help seasonality alleviated (Figure 2.10, Appendix 55-72). This is clearly seen and confirmed by the Table 2.20.

Seasonality of visitor arrivals by country of origin

Table 2.20 identifies the best and the worst markets in terms of seasonality. As noted above, as well as Eastern European countries, particularly Japan is a very suitable and quality tourist market in terms of prolongation of the main peak-season and making more money out of few visitors without disturbing the environmental balances. As far as the visitors from Eastern European and member Republics of CIS are concerned, the purpose of visit differs from the rest of visitors from all over the world ranging from earning money by trading the goods they bring with them to purely holiday and cultural purposes. However, the important thing is that with a few exception all parties involved - tourists themselves, tourism and particularly hospitality industry, local people and local economy, and at a large scale Turkish economy - benefit from these prolonged visitor movements.

Table 2.19 Final mean seasonal Indices for monthly arrivals and tourism receipts-1980-2003

	Final mean seasonal indices for monthly arrivals of foreign visitors to Turkey and tourism receipts (1980-2003)											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
OVERALL SEASONALITY												
Overall visitor arrivals	40,2	43,2	61,5	89,1	118,2	123,6	160,6	171,6	151,8	121,2	65,4	53,9
Overall tourism receipts	45,4	46,5	55,9	78,7	107,1	114,5	144,5	188,6	157,7	134,1	73,4	54,4
Average receipts per head	109,5	103,2	90,8	87,4	89,9	93,9	92,0	109,1	105,8	112,3	107,7	98,8
SEASONALITY BY MODE OF TRANSPORT												
By air	37,5	40,5	59,7	89,4	129,2	134,2	166,0	170,2	158,7	115,4	54,2	45,9
By road	62,6	66,4	84,0	93,0	97,4	97,8	136,3	150,4	115,9	112,1	98,2	85,4
By sea	14,9	14,5	26,6	78,6	129,2	136,2	175,0	206,2	191,9	160,0	45,8	21,4
By rail	65,1	65,8	82,9	86,2	86,7	90,5	151,2	170,2	124,6	106,1	84,9	86,0
SEASONALITY OF ARRIVALS BY REGION												
European OECD countries	23,9	27,2	43,8	91,0	132,9	136,0	179,2	196,3	166,4	124,2	44,2	35,3
Non-European OECD countries	35,9	36,1	54,9	93,1	142,5	140,8	144,7	140,7	159,2	151,6	62,0	37,6
Other European countries (Eastern)	63,5	67,7	87,7	95,0	98,9	102,9	122,7	136,6	118,7	115,0	108,1	83,0
African countries (1986-2003)	75,3	62,9	79,3	79,1	101,2	119,2	141,1	140,8	113,5	101,0	94,5	91,7
Asian countries (1986-2003)	56,0	60,5	75,5	78,2	88,7	105,4	162,8	172,8	140,4	108,4	82,8	68,5
American countries	33,8	30,9	44,7	82,7	125,6	138,8	200,8	152,0	174,1	144,6	43,8	27,9

Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation

Figure 2.10 Final seasonal indices for visitor arrivals by region (1980-2003)

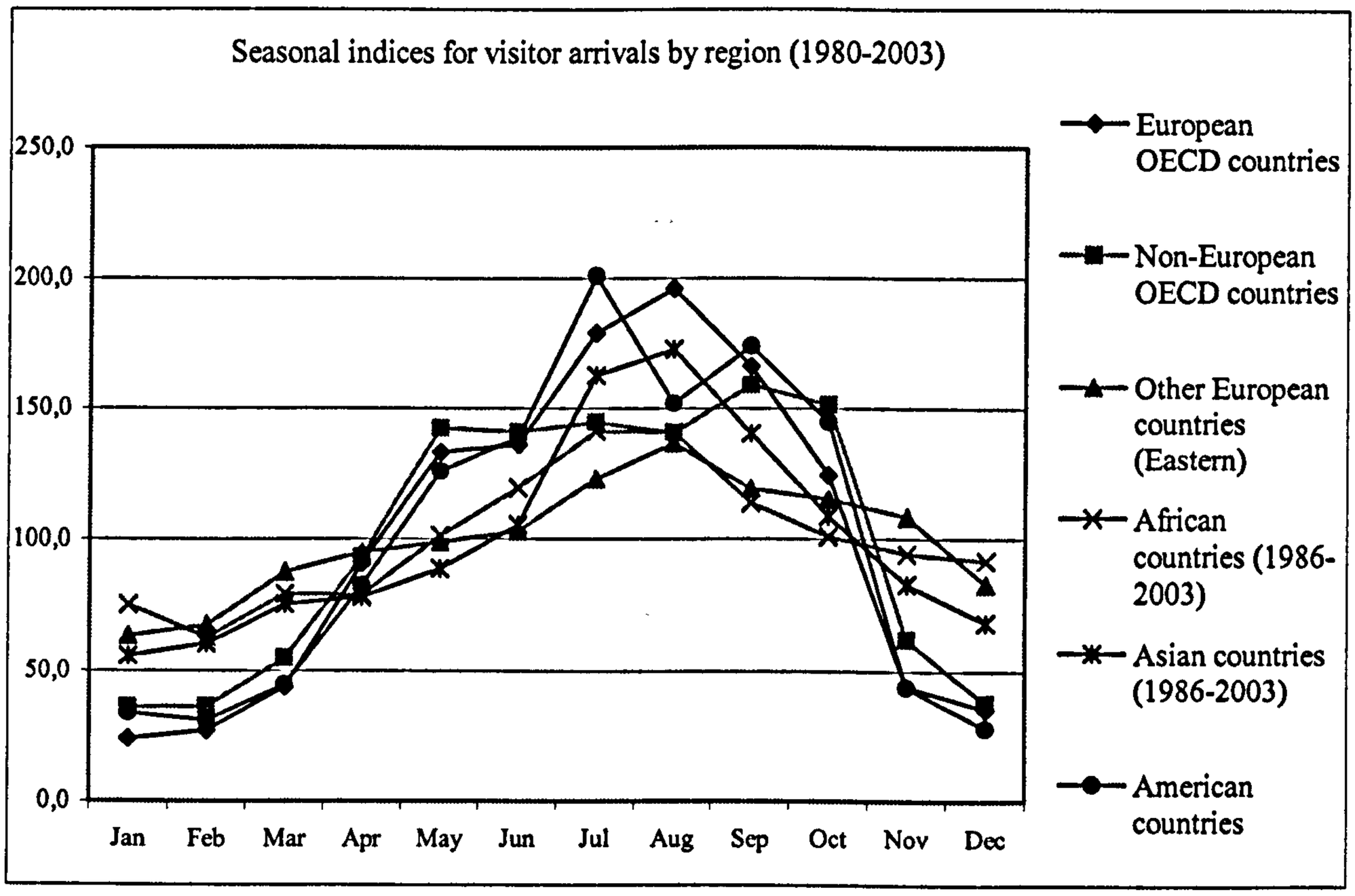


Figure 2.11 Seasonal Indices for arrivals from top-five countries (1985-2003)

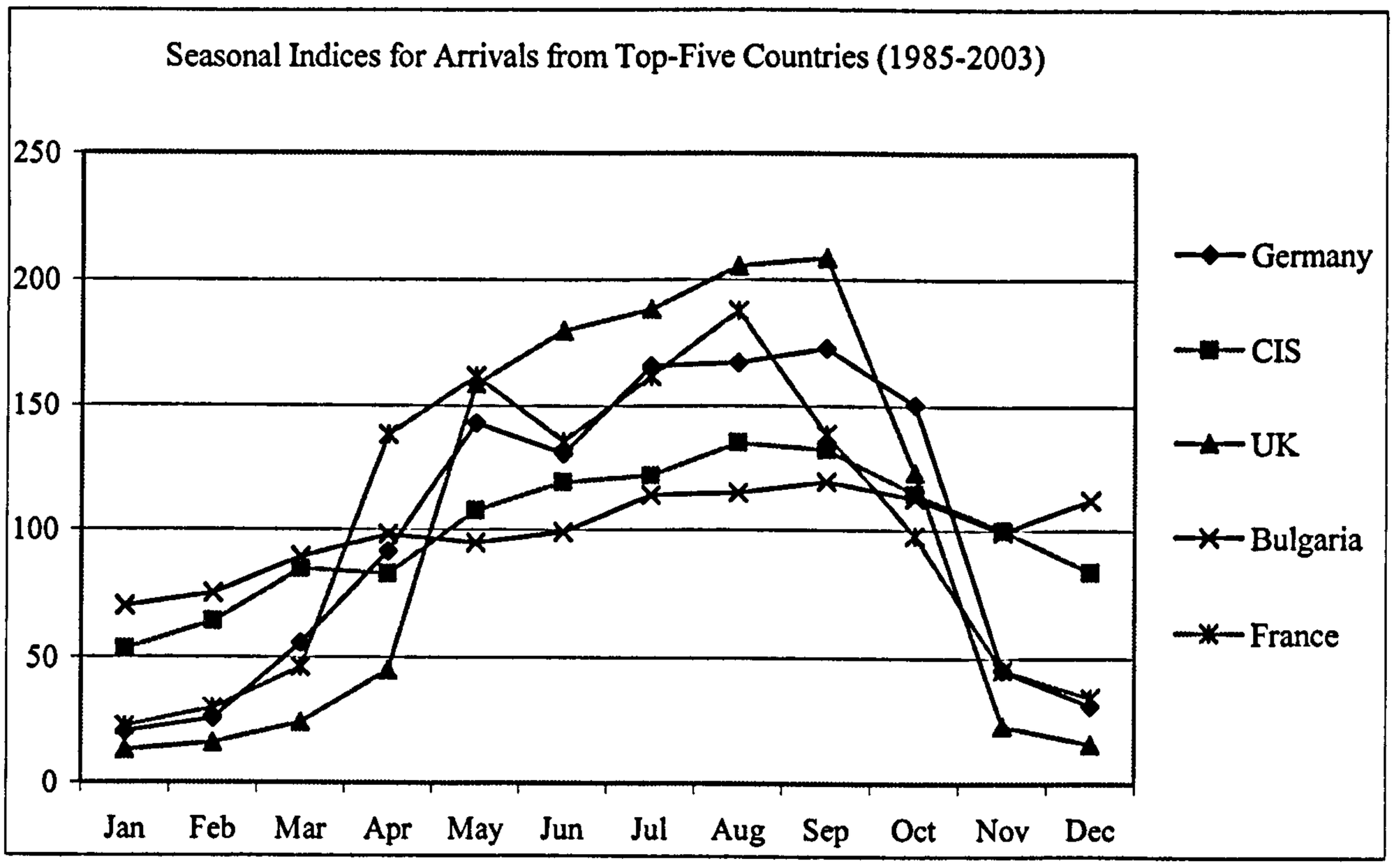


Table 2.20 Final mean seasonal indices for visitor arrivals-1985-2003

	Final mean seasonal indices for visitor arrivals-1985-2003											
	Off-season				Peak-season						Off-season	
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Australia	32,0	27,1	46,6	124,9	145,5	142,4	161,8	159,6	163,0	112,6	47,6	36,5
Austria	16,6	23,1	39,0	79,0	134,2	159,7	210,0	201,9	164,8	104,1	40,2	27,4
Belgium	18,8	23,5	41,5	88,4	136,4	125,6	248,0	192,9	166,3	100,0	33,6	25,3
Bulgaria	70,2	75,0	89,3	98,1	94,9	99,1	114,0	115,0	119,4	112,7	99,5	112,1
Canada	24,2	25,1	48,5	79,1	156,7	137,4	150,8	142,0	195,8	163,3	48,5	28,7
Czechoslovak.	17,0	21,4	37,8	54,5	98,6	190,4	161,8	173,2	234,7	121,7	59,1	29,0
CIS (Soviet)	52,9	64,2	84,5	82,7	107,5	118,9	121,7	135,0	132,4	114,6	100,2	83,7
Denmark	12,7	14,2	30,1	61,9	118,0	189,3	252,0	203,9	178,1	106,3	19,8	13,7
Egypt	50,9	48,3	59,9	75,5	78,3	104,4	188,4	222,7	141,2	90,4	76,0	63,8
Finland	10,1	14,2	32,1	124,9	154,9	159,9	164,3	158,6	186,8	153,8	27,7	12,9
France	22,5	29,6	46,2	138,2	162,0	135,8	161,8	187,9	138,7	97,7	45,2	34,5
Germany	20,3	25,6	55,4	91,6	143,0	130,8	166,1	167,2	173,1	150,6	45,2	31,2
Greece	61,5	70,5	72,7	103,4	90,4	92,0	129,0	174,1	115,4	104,8	87,2	97,2
Hungary	32,2	40,3	75,1	105,4	85,8	115,1	153,2	162,9	143,9	131,6	100,6	53,9
Iran	50,9	56,3	85,2	77,3	104,6	108,9	133,5	149,5	143,7	119,1	101,4	69,6
Iraq	70,2	71,4	80,4	81,2	94,6	101,8	149,5	150,7	123,9	104,6	89,5	82,0
Italy	26,8	29,4	43,2	77,5	89,5	120,1	174,4	330,2	145,1	81,9	35,3	46,0
Japan	79,1	98,0	117,4	108,3	95,3	89,6	98,2	127,6	110,9	93,9	87,0	97,1
Jordan	56,6	56,7	59,3	63,4	68,0	113,4	211,7	215,9	131,8	89,8	66,8	65,2
Kuwait	31,3	26,3	26,7	28,9	38,8	142,3	452,3	304,8	66,0	33,4	25,1	24,8
Lebanon	48,5	47,7	60,7	86,2	71,4	80,8	145,8	229,2	188,6	95,6	72,1	74,0
Libya	109,2	58,1	65,3	71,9	79,8	91,0	118,7	129,1	135,9	128,0	117,1	96,2
Netherlands	15,0	20,3	30,3	84,0	145,4	129,7	237,9	194,5	175,1	119,9	24,8	22,9
Norway	7,2	8,7	15,6	46,6	134,5	208,1	263,3	217,4	186,5	90,4	13,4	8,5
Pakistan	66,1	60,5	69,3	79,9	90,1	115,0	147,2	136,4	137,6	116,9	94,4	84,4
Poland	46,6	54,6	70,8	79,9	92,9	111,0	168,6	183,7	149,2	103,0	80,1	61,3
Romania	80,9	69,5	89,1	92,0	95,2	95,2	120,9	140,4	121,0	111,0	99,5	84,1
S. Arabia	36,0	29,6	35,3	46,3	56,9	117,5	359,6	297,3	101,4	50,3	37,2	32,8
Spain	26,2	36,0	68,5	100,5	76,0	86,7	170,4	283,8	156,9	99,2	46,3	48,9
Sweden	12,4	13,9	23,5	79,4	145,8	194,6	207,3	189,1	175,3	118,0	24,3	16,6
Switzerland	19,6	28,7	48,9	86,5	118,8	130,6	196,6	132,5	182,3	180,3	41,9	33,5
Syria	82,5	79,5	84,3	82,4	84,7	89,9	122,7	144,4	122,2	109,3	99,5	97,8
UK	12,8	15,7	23,9	44,8	158,9	179,9	188,6	205,4	208,5	123,1	23,1	15,8
USA	34,3	33,4	55,2	85,4	137,2	151,4	149,9	136,4	155,6	158,4	66,6	36,4
Yugoslavia	71,2	89,1	89,9	98,0	89,7	90,7	121,2	121,9	100,8	111,9	121,9	93,0
	Final mean seasonal indices for visitor arrivals-1986-2003											
Algeria	79,4	78,6	114,2	102,6	118,7	116,7	112,8	115,0	90,4	92,9	93,2	87,6
Israel	30,9	35,1	58,2	78,6	74,8	107,1	203,4	256,1	156,1	113,8	45,7	38,4
Morocco	54,4	61,8	65,2	83,1	97,1	127,6	182,9	181,6	105,0	87,6	72,4	80,3
N. Zealand	19,5	19,7	33,5	132,0	140,2	149,3	152,6	182,8	176,2	122,7	42,0	28,3
Sudan	65,1	75,2	75,2	79,5	90,5	120,9	147,5	151,5	136,5	107,9	89,8	61,6
Turk. Cyprus	67,1	88,1	70,0	74,3	89,6	111,1	164,1	168,9	135,2	88,2	71,6	70,8
Tunisia	92,2	76,7	127,6	79,9	110,5	140,3	137,2	91,0	61,7	69,2	101,4	114,9

Table 2.21 Final mean seasonal indices for one year ahead-2004

	Final mean seasonal indices for one year ahead-2004											
	Off-season				Peak-season						Off-season	
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Australia	27,0	27,3	47,4	174,7	134,2	139,0	159,5	142,8	165,6	102,5	44,0	35,8
Austria	18,4	26,5	28,5	81,5	101,7	170,5	253,3	198,5	150,4	105,8	36,2	28,3
Belgium	17,9	23,4	41,7	95,3	115,1	137,9	232,5	181,3	168,3	117,4	42,0	27,0
Bulgaria	69,3	76,1	80,9	88,4	102,7	93,0	110,4	128,8	126,5	120,1	100,7	102,0
Canada	23,8	28,8	55,6	76,4	146,1	129,4	164,3	151,9	177,0	159,4	55,1	32,0
Czechoslovak.	18,2	20,3	40,8	36,5	77,2	188,2	234,9	230,0	194,6	92,4	42,8	23,9
CIS (Soviet)	55,0	54,8	56,4	78,1	113,2	133,6	152,9	180,9	154,9	100,1	67,1	52,1
Denmark	11,9	15,1	31,9	58,9	120,0	231,5	256,4	188,9	157,6	90,4	22,1	15,3
Egypt	45,7	47,9	56,9	72,9	86,4	102,0	199,4	236,6	144,2	89,0	62,0	57,3
Finland	9,6	13,8	25,4	139,9	154,3	147,7	162,9	139,7	171,8	205,7	19,3	10,1
France	25,8	37,0	45,8	125,9	125,8	129,2	191,8	195,8	132,4	108,4	44,4	37,3
Germany	30,7	39,5	51,7	87,8	121,3	129,5	175,4	146,7	157,2	153,3	67,0	40,1
Greece	67,4	73,8	77,2	102,8	92,6	107,9	116,3	166,5	114,0	111,8	87,3	82,4
Hungary	38,4	45,4	52,2	63,6	72,5	152,9	205,7	187,6	167,3	112,5	61,5	39,1
Iran	45,5	52,2	101,1	72,0	119,2	109,5	132,6	144,9	153,1	123,4	92,5	54,0
Iraq	72,8	71,7	87,8	91,4	104,9	105,4	131,8	132,9	114,5	100,9	88,6	98,1
Italy	27,1	40,0	47,5	69,8	80,2	137,8	188,5	292,2	142,6	87,8	43,0	43,0
Japan	57,7	76,3	117,9	108,6	97,7	87,4	102,6	116,2	122,3	117,5	103,0	93,6
Jordan	58,6	52,9	64,6	60,0	68,7	107,7	223,2	246,4	119,8	85,8	55,6	56,6
Kuwait	26,9	30,0	27,1	23,6	41,6	93,4	420,3	390,1	68,2	37,4	15,7	25,9
Lebanon	50,1	49,2	64,8	73,2	68,6	79,5	154,7	263,3	163,6	89,3	79,4	64,8
Libya	88,1	51,0	68,0	101,2	100,3	93,7	115,7	112,5	105,5	142,6	119,1	102,0
Netherlands	16,0	25,0	34,8	90,6	152,6	133,0	239,7	154,1	158,5	139,8	31,1	24,7
Norway	8,4	11,4	13,7	31,2	123,4	248,1	309,3	195,9	163,9	67,0	15,5	12,3
Pakistan	70,7	69,1	90,7	76,3	93,2	125,8	148,1	134,7	119,0	125,2	70,5	76,7
Poland	17,2	20,5	25,3	72,6	101,1	169,2	242,5	229,9	196,1	69,1	31,2	24,5
Romania	94,5	70,0	76,7	81,2	88,5	100,4	127,3	167,0	130,1	98,2	90,0	75,4
S. Arabia	32,5	34,4	32,5	32,9	53,3	144,4	408,5	277,5	67,1	51,5	31,8	34,0
Spain	26,4	42,1	62,7	109,2	69,4	86,9	181,7	262,6	160,5	99,2	43,5	54,9
Sweden	12,5	15,6	20,8	61,4	151,9	226,2	223,0	177,9	163,2	106,4	24,4	16,6
Switzerland	20,2	36,7	57,6	85,6	94,9	132,5	198,0	106,6	166,7	193,9	62,2	45,0
Syria	83,6	77,0	83,9	78,5	88,9	90,9	130,6	148,0	125,1	110,0	94,9	87,8
UK	12,6	15,2	19,5	35,3	160,1	171,5	209,0	196,6	203,0	136,0	23,3	18,0
USA	35,2	34,2	67,0	87,5	133,6	159,9	161,6	130,0	129,6	138,9	75,3	47,3
Yugoslavia	66,7	76,6	69,2	81,1	81,4	103,8	179,5	163,1	123,6	99,1	74,3	80,5
	Final mean seasonal indices for one year ahead-2004											
Algeria	95,6	80,0	94,7	101,9	100,2	93,7	105,6	130,8	98,1	106,6	107,2	85,8
Israel	33,7	44,2	69,1	82,3	87,0	110,2	182,5	219,8	158,0	118,3	50,9	43,3
Morocco	66,4	65,1	78,8	86,1	101,7	93,1	137,8	223,1	123,1	88,2	56,3	80,8
N. Zealand	19,0	21,4	32,1	196,8	131,3	135,5	139,1	150,8	188,0	117,9	37,3	30,8
Sudan	55,7	58,8	79,5	85,6	100,8	129,3	159,2	151,7	148,0	110,3	67,1	54,1
Turk. Cyprus	70,8	91,9	76,1	70,7	88,0	110,7	176,4	181,1	122,0	74,8	68,2	68,9
Tunisia	61,6	59,5	124,0	76,6	137,1	156,8	122,2	88,3	63,1	80,7	141,7	85,9

When Table 2.20, which demonstrates the seasonal trend which reflects the past behaviour of visitor arrivals, and Table 2.21, which indicates the predicted seasonal concentration in the coming year, are analysed, current and future best and worst markets in terms of seasonality and promising countries are revealed. Table 2.22 and Table 2.23 identify and group the countries according to number of months whose seasonal indices exceed the mean in off-season of Turkish tourism which is between November and April. Japan, Greece, Syria, Eastern European countries (Former Yugoslavia, Bulgaria, Hungary and Romania) and North African countries (Libya, Tunisia, and Algeria) indicate higher concentration out of main peak season. Arrivals from Japan and North African countries do not indicate significant peaks and troughs in contrast to others. Secondarily, although, important countries to improve seasonal pattern range from New Zealand and Pakistan to Finland and Algeria, CIS, France, Romania, Iran, Greece, Bulgaria and Finland show greater importance as these countries are ranked in top twenty in terms of number of arrivals.

Table 2.22 Countries from which part of the arrivals concentrate in off-season months

Number of months arrivals concentrate in off-season (November-April)				
One month		Two months	Three months	Four months
Australia	Romania	Greece	Bulgaria	Japan
CIS	Spain	Hungary	Libya	
Finland	New Zealand	Syria	Tunisia	
France		Yugoslavia		
Iran		Algeria		
Pakistan				

However, future predictions indicates that while concentration will increase in arrivals from CIS, Pakistan, Hungary, Former Yugoslavia, Japan, Bulgaria, Tunisia, Syria and Greece, polarisation of arrivals from particularly Algeria is to be continued in off-season. In the mean time, Iraq and Belgium are estimated to join in the countries from which arrivals concentrates out of peak season. Arrivals from other countries are estimated to remain unchanged.

Table 2.23 Prediction of countries from which part of the arrivals is expected to concentrate in off-season months in 2004

Number of months arrivals will concentrate in off-season (November-April)					
One month			Two months	Three months	Four months
Australia	*Greece (-1)*	Spain	*Bulgaria(-1)*	*Japan (-1)*	***Algeria (+2)***
Belgium (+1)	Iran	*Syria (-1)*	*Tunisia (-1)*	Libya	
Finland	***Iraq (+1)***	New Zealand			
France	Romania				
Countries expected to be out of Table 2.22: CIS, Pakistan, Hungary, Yugoslavia					
*(- +) signs indicate the whether period of concentration will get worse or better in 2004					

On the other hand, arrivals from some origin countries concentrate totally in peak season (Table 2.24). The length of concentration ranges from only in three months, Kuwait, to six months, mostly European countries. The peak season of visitor arrivals from main tourist markets of Turkey is generally six-month long between May and October and directly affect and determine the overall

seasonal pattern of visitor arrivals to Turkey and the length of peak season. Arrivals from Middle Eastern and Arabic countries such as Kuwait, Egypt and Jordan and some Mediterranean countries such as Italy, Turkish Republic of Northern Cyprus, Lebanon, Israel and Morocco indicates high seasonal concentration in four and five months of peak season in Turkey. However, except for Italy and Israel, arrivals from other seasonal countries do not demonstrate significant importance in total arrivals and thus they have smaller contribution to overall seasonality. On the other hand, Israel and Italy, which ranked as 10th and 13th in total arrivals respectively in 2003, have important role in concentration of visitor arrivals in peak season.

Table 2.24 Countries from which arrivals concentrate totally in peak season months

Number of months arrivals concentrate in peak season (May-October)				
Three months	Four months	Five months	Six months	
Kuwait	Egypt	Norway	Austria	Netherlands
	Italy	Poland	Belgium	Sweden
	Jordan	Israel	Canada	Switzerland
	Lebanon	Morocco	Czechoslovakia	United Kingdom
	Saudi Arabia	Sudan	Denmark	USA
	Turkish Cyprus		Germany	
			Iraq	

The most significant changes in the seasonal concentration of arrivals are predicted from Commonwealth Independent States (CIS) which is one of the main tourist markets of Turkey since the collapse of the former Soviet Republic, Hungary, Denmark, Yugoslavia, Pakistan, Morocco and from Czechoslovakia. The length of the peak season of arrivals are expected to decrease significantly from seven months to six months from CIS, from seven months to five months from Hungary and from six months to four months from Czechoslovakia in 2004 (Table 2.25). Seasonal concentration in currently seasonal markets, Lebanon, Saudi Arabia, and Kuwait is estimated to get worse in 2004. Only promising improvement in seasonal concentration is expected in arrivals from Sudan. Five-month long peak season of arrivals from Sudan is to be extended to six months, but still in peak season of Turkey, May-October.

Table 2.25 Prediction of countries from which arrivals is expected to concentrate totally in peak season months in 2004

Number of months arrivals will concentrate in peak season in 2004 (May-October)					
Two months	Three months	Four months	Five months	Six months	
Kuwait (-1)	*Lebanon (-1)*	*Czechosl. (-2)*	*Denmark (-1)*	Austria	United Kingdom
	S. Arabia (-1)	Egypt	*Hungary (-2)*	Canada	USA
		Italy	Norway	*CIS (-1)*	***Sudan (+1)***
		Jordan	*Pakistan (-1)*	Germany	
		Morocco (-1)	Poland	Netherlands	
		Turkish Cyprus	*Yugoslavia (-1)*	Sweden	
			Israel	Switzerland	
Arrivals from Belgium and Iraq is expected to be one month longer (7 months) in 2004					
*(- +) signs indicate the whether period of concentration will get worse or better in 2004					

It should be noted that the purpose of visit, tourism receipts and size and importance of the markets analysed above are the primary factors in determining whether these markets contribute seasonal patterns in positive or negative direction. For example, the seasonal concentration of arrivals from Kuwait does not affect the overall seasonal pattern since the number of arrivals from this country is rather low. Likewise, the prediction of improvement in seasonality in Sudanese visitor arrivals in from 5 months to 6 months in 2004 will also not contribute improvement of seasonal pattern greatly either as Sudan is one of the least important African tourist markets of Turkey. Therefore, each market should be evaluated according to its importance for a destination. Algeria, Tunisia, Libya and Former Yugoslavia which are not in top fifteen in tourist arrivals and Bulgaria, CIS, France, Iran and Greece in top fifteen seems to be promising in terms of dispersion of seasonality. However, while CIS, Algerian, Tunisian and Iranian visitors' main purpose of visit was shopping, Bulgarian, Romanian and Former Yugoslavian visitors' primary purposes were visiting friends and relatives and shopping which usually do not depend on certain time. As a consequence, improving seasonality of arrivals from major markets such as Germany, UK, CIS, USA, Austria, Greece, and France will significantly help to reduce overall seasonality in Turkey and the focus should be on these major markets.

The analysis of regional and provincial data

In this section of the study, seasonal analysis is made to show differences and make comparisons between regions and within the regions between provinces. While regional tables indicating these differences and comparisons, provincial tables support and explain the reasons behind the regional differences, and which provinces cause those changes in a certain region. Therefore two different tables (regional and provincial) are used in the analysis. In the analysis, only three years of related data was able to be obtained from the Turkish Ministry of Tourism and only the available data between 1994-1996 are used although accommodation statistics dating back longer years would be appreciated for the reliability of the results. However, the general regional and provincial outlook in terms of seasonality does not indicate significant differences almost ten years later.

Accommodation statistics are obtained by survey conducted by the Ministry of Tourism every year among the majority of Ministry registered accommodation establishments. There were total of Ministry registered 265136 beds in 1994, 280463 beds in 1995 and 301524 beds in 1996 in Turkey. 254379 beds in 1994, 272038 beds in 1995 and 286821 beds are included in the accommodation survey and participation rates were realised as 95.9% in 1994, 97.0% in 1995 and 95.1% in 1996. Thus, it should be kept in mind that the statistical data used in this study represents at least 95% of the Ministry registered accommodation in Turkey, if not the total capacity.

Analysis of seasonal changes in number of nights spent

While the number of foreign visitor arrivals to accommodation establishments indicate the peak season between April and October and number of nights spent by foreign visitors indicate one month shorter peak season between May and October (Appendix 76, 77). However, arrivals and number of nights spent in the regions indicated similar results and therefore, since analysis of the number of nights spent is preferable to indicate reliable seasonal trend in regions, number of nights spent in the regions are evaluated in general.

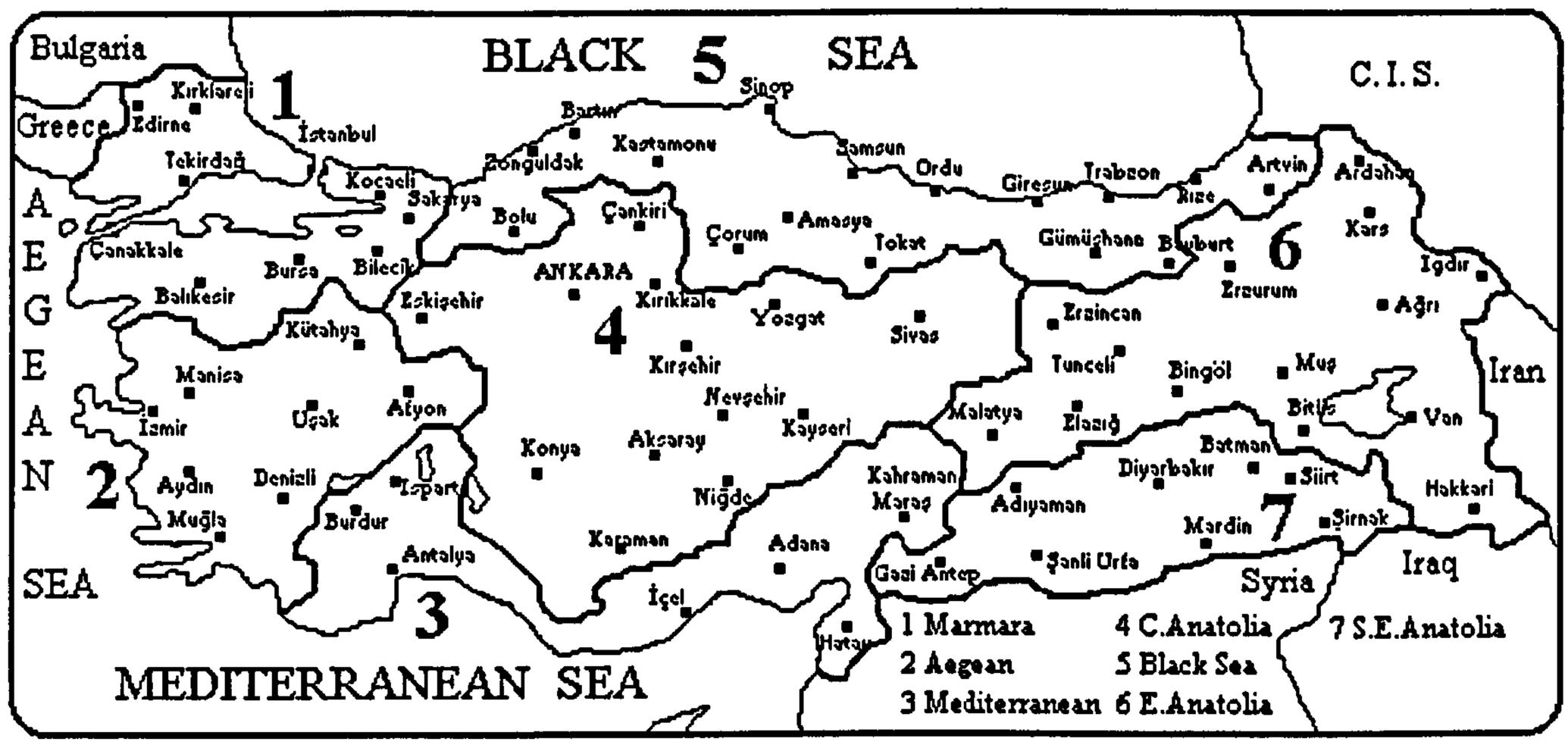
Number of nights spent by foreign and Turkish visitors at Ministry registered accommodation establishments show different seasonal trends. Although peak season for both were similar between April and October, in contrast to Turkish citizens, foreign visitors indicated sharp peaks and falls in number of nights they spent. Turkish citizens showed significantly smooth seasonal trend apart from February, the lowest seasonal index observed, in inner provinces, but indicated higher concentration between May and October in coastal provinces. On the other hand, nights spent by foreign visitors demonstrated higher concentration in coastal provinces between May and October compared to their concentration in inner provinces between April and October which is one month longer and much smoother than in coastal provinces (Appendix 77, 89, 90).

The lowest and highest seasonal indices for foreign number of nights spent were recorded in coastal and tourism regions of Aegean in particular and Mediterranean. The lowest and highest seasonal indices in Aegean region were identified as only 8 in December and 217 in August which were respectively higher in Mediterranean region, 20 in January and 199 in August. The peak season in these regions is between May and October. April is closer to become seventh month of the peak season, but very sharp falls are seen in November. Therefore, possibility of expansion of the peak season of international tourism towards the pre-peak season is much better and have higher chance than towards to post-peak season in these important tourism regions. The peak season in other important regions of Marmara and Central Anatolia was longer. The length of peak season in Marmara was eight months between March and October and seven months in Central Anatolia between April and October and they did not indicate sudden and sharp peaks troughs particularly in Marmara. Black Sea region indicated very similar trend with Central Anatolia region. South East Anatolia and East Anatolia showed different trend than the other regions. Two peaks in January and April were identified in East Anatolia, while peak season shifted to November in South East Anatolia, May-November (Appendix 77, 89).

All these demonstrate that the major contributors to seasonality in Turkish tourism are coastal regions, namely Aegean and Mediterranean regions. Therefore, most opportunities for the improvement of overall seasonality rely with the development and improvement of international off-season tourism in these highly seasonal regions and the development of less- or non-seasonal

tourism products popular in coastal and less popular inner and coastal regions, East, South East, Central Anatolia and Black Sea and in mainly business and cultural region of Marmara.

Map 2.1 The regions and provinces of Turkey



Seasonal trends in number of nights spent by Turkish citizens were much smoother almost in all regions except for Aegean and Mediterranean regions where Turkish nights also concentrates in peak season like foreign nights, with a small difference. While peak season starts one month earlier in April and ends one month before in September in Aegean, Turkish nights concentrates between May and September in Mediterranean region where is visited by usually and mostly by foreigners rather than Turkish citizens (Appendix 77, 89).

Price policies are determined according to mainly European foreign visitors' living standards which are significantly higher than Turkish citizens' living standards and company policies for accepting totally foreigners, working with fully or mainly with tour operators particularly in Mediterranean and Aegean regions, have kept middle and lower income class Turkish citizens away from these regions and Ministry registered quality accommodation. Although, at present, companies in the industry are officially warned about the discrimination and penalties for this kind of behaviour, the problem of discrimination continues. Whereas, domestic tourism would help extending the main season further by encouraging them to take their holidays in March, April, October and November when small number of foreign visitors visit Turkey and offering attractive special prices.

Analysis of seasonal changes in average length of stay

Although Turkish citizens' length of stay indicated significantly smaller differences, there have been huge differences between foreign visitors' length of stay in inner and coastal provinces of Turkey. While foreign visitors' average length of stay in coastal provinces ranged between 3 and 5.5 nights, it was recorded as 1.5 to 2.6 nights in inner provinces between 1994 and 1996. In other

words, foreigner spent double the time in coastal provinces than they spent in inner provinces (Appendix 79). On the other hand, Turkish citizens spent around 1.8 nights in coastal provinces while they spent slightly shorter time, approximately 1.6 nights in inner provinces (Appendix 80). It is worth noting that a decreasing trend has been observed in the length of foreign visitors' stay in both coastal and inner provinces while length of Turkish visitors' stays remained levelled.

While seasonal analysis of foreign visitors' length of stay shows the peak season in longer stays as between April and October in coastal provinces, longer stays are distributed much more evenly in a year compared to coastal provinces and, in contrast, are concentrated between off-season months of November and March in inner provinces. On the other hand, longer Turkish stays also peaked between April and October in coastal provinces and while inner provinces recorded very smooth trend all year round (Appendix 78). Therefore, assuming that this trend will remain unchanged or improved further, despite decreasing average foreign length of stay and shorter foreign and Turkish length of stays in inner provinces, development and promotion of tourism in inner provinces will provide stable employment and other economical benefits to these provinces throughout the year rather than during only in a few months of the year, usually summer season.

The longest foreign stays were recorded in Mediterranean and Aegean region where coastal tourism is popular and which reflects the nature of the package holiday products on offer. The foreign length of stay in Mediterranean region ranged between 4.3 to 8.8 nights, it ranged from 1.7 to 5.8 nights in Aegean region. In general, there has been a decrease in the length of foreign visitor stays in these regions. Marmara and Central Anatolian regions exhibited more stable trend and foreign length of stay recorded as around 2.5 nights in these regions. The shortest foreign stays were realised in Black Sea and East Anatolia regions where no significant long-stay tour operations available (Appendix 79).

In seasonality terms, except for Aegean region where the longer foreign stays concentrated between April and October and Mediterranean region, May-November, longer stays concentrated mainly in off-season months in all other regions. All important tourism regions, apart from Aegean, indicated a relatively smoother seasonal trend.

Except for Aegean and Mediterranean regions, no significant differences between the regions and fluctuations throughout the year were observed in the length of Turkish citizens' stay which was around 1.3 to 1.9 nights. However, the longest Turkish stays were recorded in Mediterranean and Aegean regions respectively in the months of peak summer season and seasonal indices confirmed these statements (Appendix 78, 80). The longest stays were recorded as 4.1 nights in Mediterranean and 2.9 nights in Aegean regions in August 1994. There have been increases in the length of stay in these regions in 1996 compared to 1994 figures.

Analysis of seasonal changes in number of employees

Permanent staff can be described as the people who are employed 12-month in accommodation establishments operate all year round and from the beginning to the end of the season in seasonal establishments. The number of average monthly permanent staff employed in surveyed establishments reached to 37980 in 1996. In parallel to the distribution of bed capacity and the seasonal and other characteristics of the regions, while higher permanent employment was realised in Marmara, Mediterranean, Aegean and Central Anatolian regions, significantly lower permanent employment realised in Black Sea, East Anatolia and South East Anatolia. While coastal provinces employed 29922 (78.8%) of total of 37980 monthly average permanent staff in 1996, inner provinces' share was only 8058 (21.2%) indicating the significant spatial imbalance (Appendix 82, 83).

While permanent employment peaks in summer months in coastal regions of Aegean and Mediterranean regions (April and October), it peaks in winter and spring months, in general, in inner regions of East Anatolia, South East Anatolia and coastal region of Black Sea (January and June). The remaining regions, Marmara and Central Anatolia indicates a less seasonal trend which can be described as even and steady compared to other regions. When coastal and inner provinces compared, coastal provinces indicate seven-month peak season, April-October, provinces in inner regions also indicate seven-month peak season but between January and July. However, large fluctuations is not seen in inner provinces as experienced in coastal provinces. In general, permanent employment peaks between April and October and off-season is between November and March. Change and peaks and troughs in the number of permanent staff by season is the result of operation of seasonal establishments in a certain season and declaring their staff as permanent staff as they employ them regularly every year from the beginning to the end of season. Another reason for this is that opening of newly constructed establishments is realised, in general, in peak season in that region or just before peak season.

On the other hand, temporary staff describes the employees who work in a certain period of the year in 12-month open establishments and certain times of the season in seasonal establishments either full- or part-time basis. A monthly average of 15253 temporary staff was employed in 1996 and Mediterranean (52%) and Aegean regions (37.9%) were the highest employers of temporary staff. Marmara's share was 6.5% and the remaining other four regions total share was only 3.6%. It indicates that how much tourism movements, activities and business seasonal in particularly Southern and Western coasts of Turkey. Against 14677 temporary employments in coastal provinces which represent the 96.2% of total, only 577 staff (3.8%) is employed in inner provinces in 1996 showing the degree of seasonality and concentration of seasonal employment in coastal provinces (Appendix 82, 84).

The Appendix 82 and 84 identify that seasonal temporary employment in Turkey starts in April, just before the main peak season, reaches at its peak in July and ends in October. Although provinces on coasts and in inner areas demonstrate the similar overall seasonal trend, provinces on coasts of particularly Aegean, Mediterranean and Marmara Sea indicate sharp increases and concentration between April and October. On the other hand, in contrast to coastal provinces which indicated sharp peaks and troughs inner provinces showed smoother seasonal trends in temporary employment since they do not rely totally on seasonal foreign visitor arrivals and entertain generally Turkish citizens and businesspersons, nearly all are open all year round and number of employees do not change significantly throughout the year.

Aegean, Mediterranean and Central Anatolian regions indicate the same seasonal trend in seasonal temporary employment which peaks between April and October. There has been a link and partnership between particularly coastal regions of Mediterranean and Aegean region and inner region of Central Anatolia. Daily excursions and short-breaks for particularly foreign visitors are popular in Central Anatolia and particularly in Cappadocia area and their foreign visitors are usually from the neighbouring Mediterranean and other regions. Therefore, these three regions and tourist centres in these regions such as inner province of Nevsehir in Central Anatolia and Antalya on the Mediterranean coast indicate similar seasonal trend in temporary employment. Temporary employment peaks in Marmara primarily between May and September and as secondarily peak in December and January which is the Christmas holiday and New-Year period. Black Sea, East Anatolia and South East Anatolia shows irregular seasonal trend. However, seasonal employment in these regions reaches its peak in off-season months. The reasons for these concentrations are that the availability of number of open ski resorts, hunting facilities and suitable conditions for some other sports which cause consequently longer stays in these regions and require temporary seasonal employment. For example, temporary employment in ski resorts of Erzurum in East Anatolia, Bursa in Marmara and Kayseri in Central Anatolia indicate high concentration in winter months.

When one considers that around 15000 staff which is nearly half of the permanent employment (29922) is employed in highly seasonal coastal provinces during peak months of Turkey, and they become unemployed in off-season, the degree of economic and social problems can be understood clearly.

2.11. Conclusions on temporal and spatial analysis

This chapter examines how Turkish tourism has developed through the years and the imbalance in tourism activities and movements at a regional and provincial base. It was thought that the identification of strengths and weaknesses, concentration and polarisation, and over-developed, developed and less-developed geographical points would help Turkish tourism industry to place its future development policies, plans and strategies on a sound, and reliable base.

Major tourism investments and tourism demand has been diverted to coastal provinces which are thought to be more profitable and more attractive than other provinces located in inner regions. Tourism is seen the shortest way to solve developing Turkey's financial and foreign currency problems and this has been supported by short-sighted tourism policies, plans, strategies and incentives which have encouraged concentration of tourism in coastal areas and neglected interior regions. While an increase of 729% in bed capacity in coastal regions was realised between 1983 and 2003, it was only 356% in inner regions demonstrating the concentration of supply in coastal areas. In addition, while the share of coastal provinces' bed capacity in total continuously increases, inner provinces share indicates a decreasing trend. 80.5% of total bed capacity was in coastal provinces in 2003 and inner provinces share was only 19.5%.

On the other hand, a significant percentage of overall visitor arrivals to and number of nights spent and average length of stay in accommodation establishments recorded in coastal provinces and their share in accommodation arrivals indicate increasing trend year by year. The share of coastal provinces in total bednights managed to reach as high as 88.5% in 2003 and inner provinces' share got even smaller, 11.5% which demonstrates the concentration of foreign tourism demand in coastal areas. This also reflects concentration of major marketing activities on coastal tourism products and the result of intensive investment and increasing supply of services and facilities in coastal areas. It was identified in this study that visitors in coastal provinces stay 2.3 nights longer than visitors in inner provinces. The ALS in coastal provinces was 3.8 nights in 2003 whereas it was only around 1.5 nights in inner provinces. Highest arrivals, highest bednights, highest ALS and as a consequence higher occupancy rates were recorded in coastal regions. Although Turkish occupancy rates were smaller in coastal areas, longer ALS and high foreign occupancy rates pulled overall occupancy rates up.

Foreign and Turkish visitors' regional preference seems clearly to be Mediterranean, Aegean and Marmara regions and Antalya, Mugla and Istanbul provinces respectively in these regions. Significant domination of coastal tourism and concentration of tourism in coastal regions has increased and worsen the imbalance between regions. Attracting both foreign and Turkish visitors to interior regions should help to improve worsening imbalance. Mediterranean and Aegean regions and Antalya and Mugla in these regions are mainly preferred for holiday purposes. However, the purpose of visit in Marmara region and Istanbul varies from business, culture and conferences to sport activities and visiting friends and relatives.

The main market for most provinces were identified as European countries and only a few tourist markets from outside Europe managed to have a place in top ten provincial markets. Germany's dominance was apparent in Turkey as a major tourist originating country. Germany, CIS, Benelux countries, Britain, France, Austria, USA, Italy, Scandinavia and Japan were identified as the main markets of Turkey. While almost same countries, Germany, CIS, Benelux countries, Britain, France, Austria, USA, Scandinavia, Italy and Spain, were identified as the main tourist market for

coastal provinces, CIS, Germany, France, USA, Japan, Italy, Benelux countries, Spain, Britain and Iran were most important markets for inner provinces. Japan, USA, CIS, Spain and Iran were the worth noting tourist markets of inner provinces. In other words, inner regions have the different capability to attract visitors from outside Europe as well as European visitors and development of tourism in inner provinces will help Turkish tourism industry to diversify its markets and spread tourism activities throughout the country which will also reduce the significant risks of relying on few markets. It was clear that different product supply can attract different markets which can help to solve imbalance problem in tourism.

Lastly, DTFI and TII index values indicated the more or less same imbalance but widening gap and sharp polarisation between coastal and inner provinces, between regions and between provinces even in top ten. Despite the rapid development, none of the regions and provinces exceeded a value of 100 and had been able to become large tourist destinations according to DTFI values. While only Mediterranean and Aegean regions could achieve to get 2.01 and 1.34 DTFI values on the regional base, five provinces, namely Antalya (9.51), Mugla (9.27), Nevsehir (2.37), Aydin (2.31) and Bolu (1.19) could get over 1 DTFI value on the provincial base. As these provinces could not reach a DTFI value between 10 and 40 they could not become provinces with an important but not predominant tourist activity.

TTI index values identified the sharp polarization much clearly than DTFI values. Except for Mediterranean (324.7) and Aegean region (159.1) and coastal regions (142.7) in 2003, all other regions OTII values remained under 100 between 1985 and 2003. In the mean time, inner regions could only achieve 26.7 in 2003 which indicates the excessive polarization between coastal and inner regions in tourist activities. On the provincial base, five provinces had the OTII value over 100 which were Antalya (1590.6), Mugla (107.4), Aydin (273.6), Nevsehir (236.5) and Bolu (105.1). Only Nevsehir, Bolu and Denizli which scored 236.5, 105.1 and 94.6 were located in inner Anatolia. In contrast to Aegean and Mediterranean regions, tourism industry's importance and contribution to the local economy in Black Sea, East and South East Anatolia was nearly negligible according to OTII values.

It is an unfortunate to see that despite significant and record breaking, development figures and rich and attractive natural and cultural resources, Turkish tourism has drawn a geographically imbalanced picture during its development period. Almost all statistical information on Turkish tourism such as bed capacity, employment, travel agencies, occupancy rates, visitor arrivals and number of spent and average length of stay point out regional and provincial imbalance which has greatly developed in favour of popular coastal provinces. The results of provincial and regional DTFI, TII and market analysis also proved this concentration of tourism in coastal regions and provinces. Development of tourism in the interior regions by using unique resources and attraction factors peculiar to these regions will ease this concentration which causes several infra-, supra-

structural, socio-cultural and economical problems, imbalance and injustice between regions and between provinces and inner regions will benefit more from the advantages of tourism.

It has been understood from the all seasonality analysis that the main peak season of Turkish tourism is six-month long and between May and October. April is potentially closer to becoming a seventh month of the peak season. Overall tourism receipts also indicate the same seasonal trend. However, receipts per visitor showed different, better and smoother seasonal trend. Concentration in the higher amount of receipts per visitor in off-season has been decreased since 1980s and is projected to continue decreasing. As the majority of visitors arrive in Turkey in the peak season, the concentration of higher amount of receipts per visitor in peak-season can be perceived as beneficial and in favour of Turkey. However, special attention should also to be paid to maintain and improve visitor expenditures per head in off-season.

As most significant mode of transport used by three quarters of foreign visitors to access Turkey, it can be said that overall seasonality in Turkish tourism is determined by air arrivals which concentrates between May and October. This mainly reflects the structure of tourism demand from mostly primary European markets and supply of tourism in Turkey. However, as transportation cost forms important part of the overall holiday cost, it is essential to provide and encourage cheaper flights in off-season to attract more visitors and improve seasonality in air arrivals in order to achieve and be successful in the improvement of overall seasonality in Turkish tourism. Arrivals by road mainly from neighbouring and countries in short distance is relatively smoother and indicates eight-month peak season between April and November. On the other hand, rail arrivals peaks in only four months of late peak season and arrivals by sea indicates sharp increases and decreases, but they both do not exhibit big importance in number of overall arrivals and contribution to the overall seasonality.

Apart from Eastern European, arrivals from all other regions of the world are concentrated in peak season. While the peak season for arrivals from the main tourist market of European OECD countries, other OECD and Latin American countries six-month long (May-October), it is shorter and five-month long for Asian and African countries. Only arrivals from Eastern European countries spread over the longer period of time between April and October. Therefore, it is necessary to improve the seasonality in arrivals from the main markets while keeping the seasonality of arrivals from Eastern European countries, if not possible to improve.

Seasonal analysis of arrivals to, and nights spent in, surveyed Ministry registered accommodation establishments indicated that foreign visitors as well as Turkish citizens concentrate in the main peak season. Analysis of number of nights spent recommends that possibility of expansion of the peak season of international tourism in main tourism regions, Aegean and Mediterranean, towards the pre-peak season is much better and have higher chance than towards to post-peak season. The peak season for foreign nights spent is longer in Marmara, March-October, and Central Anatolia,

April and October. In short, the main contributors of seasonality in international tourism are coastal regions and success in combating seasonality and having balanced tourism in Turkey rely with either primarily improving seasonality, prolonging the main peak season and forming shoulders and other peak months in popular coastal regions, or secondarily developing tourism in other less-popular coastal or inner regions where seasonality is relatively smoother and the main season is longer.

Turkish visitors did not record significant differences from foreign visitors in terms of seasonality being concentrated between May and October in the Aegean and Mediterranean regions. To respond to the market demand and company and pricing policies in regions mostly visited by foreign visitors which underestimates the Turkish citizens as present and potential customers pulled number of Turkish citizens staying accommodation establishments in these regions down to minimum level. Therefore, special measures should be taken to attract Turkish citizens to these regions in off-season which can help improving overall seasonality in accommodation industry in these regions and in Turkey.

The average length of stay of Turkish visitors is significantly lower than foreign visitors. The longest stays were recorded in coastal provinces and in Mediterranean and Aegean regions. Turkish and Foreign visitors spent double the time in coastal provinces than in inner provinces. This reflects the current imbalanced picture of tourism between regions. The difference in length of foreign and British visitors' stay stems partly primarily from the lower income level of Turkish citizens and secondarily lack of holiday-taking tradition. Although there is a potential and more citizens travel every year, it should be backed by appropriate policies to bring it to desired level.

In parallel to the development of tourism and opening of new establishments every year, number of permanent and seasonal (temporary) employment has showed important increases through the years. While the share of coastal provinces in permanent employment was 78.8%, inner provinces share was only 21.2% in 1996 indicating greater imbalance. On the other hand, 96.2% of all seasonal employment were realised in coastal provinces showing the degree of seasonality and concentration of seasonal employment in these popular seaside provinces between April and October. Most seasonal jobs were available in coastal and primary tourism regions of Mediterranean, Aegean and Marmara regions. Around 15000 staff, at least in TMT registered accommodation sector become unemployed and cause many economic and social problems.

Chapter 3

Methodology

This chapter describes the methodological steps taken to meet the research aim and objectives of the study. In particular, the discussion relates primarily to the need to provide an explanation and comparison of approaches to temporal and spatial imbalance in tourism by using the data gathered from British and German visitors through surveys in two Turkish destinations (Istanbul and Antalya). To explain the methodology in detail, this chapter contains the following sections: the research design, practical issues raised from multi-national and multi-destination research, survey place and site selection, data collection technique, sample design, sampling size and data analysis.

The necessity to understand the phenomenon of tourism and the many aspects of the subject which are inadequately researched and defined have lead to this study being carried out within the framework of the methodology. As tourism is necessarily involved with people and their activities, appropriate methodology was sought to collect information on their activities, needs, motivations, preferences and future intentions. Specific research techniques have been utilized within this framework are discussed in this chapter.

The off-season surveys specifically aimed to identify whether relationships and differences between variables exist, if there are any, examine these relationships and differences to find out reasons behind them and assist to determine future policy and strategies in tourism. Investigation and identification of the correlations and differences in demographic profiles, travel motivations and intentions of British and German tourist markets primarily should help to identify the current temporal and spatial patterns of Turkish tourism and more specifically the characteristics, determinants and motivations of off-season British and German tourist markets and segments to Turkey.

3.1. The Research Design

Considering the complexity of the study, and especially in view of the need to conduct diverse international studies on identification of spatial and temporal patterns which restricts the time and place of surveys, a relatively inflexible research design was necessary. The key to the study was a comparison of demographic profiles, travel motivations, preferences and future intentions of British and German tourist markets in shoulder seasons, in Antalya and Istanbul.

According to Lu (1999) the respondents would be more willing to answer the questionnaire if the study was entrusted to an educational institution. Therefore, in order to get a higher response rate,

the name of the School of Service Industries at Bournemouth University and a confidentiality assurance statement was particularly stressed on the first page of questionnaire.

The diversity of the survey places and nationalities subject to the study and differences in administration at airports and timing of flights raised a number of important and time-consuming challenges which had to be resolved.

3.2. Issues from Multi-National and Multi-Destination Research

Conducting surveys in two different destinations where visitors arrive for different purposes and among visitors from two different countries and speak two different languages as challenging and provides the researcher several new learning experiences.

The most distinctive barrier to multi-national research is the language barrier. Many studies see the language in multi-national research activities a physical barrier. As the expression and explanation styles differ in each language, different results would be obtained if questions are not set according to respondents' language rules. The idea of conducting face-to-face interviews was abandoned as language and communication difficulties with international tourists from different backgrounds, cultures and languages would not permit the study to reach its aim and objectives. Targeting only certain groups, for example, English-speaking groups would not be representative.

To some extent language difficulties were overcome by translating the English version of questionnaires into German. A native German speaking translator who also lives in Britain for long years and speaks fluent English was asked to translate the questionnaire in order to eliminate the possibility of misunderstandings and misinterpretations of questions asked and create easily understandable questionnaire. At this stage the questionnaire was also translated into French by a native French teacher who works at a British high school. However, since French visitors excluded from the study at a later stage, French questionnaire was not used in surveys.

A very small number of visitors could not be surveyed because of their late check-in and therefore shortage of time to fill in the questionnaire before boarding the plane.

Conducting the surveys personally means checking everything from the beginning, at the set-up period to the end of data analysis will be fulfilled by the researcher (European Cities Tourism, 2004, p.7), which needs time, great attention and patience. On the other hand, it would have been better conducting surveys in both locations during the same time period. As the surveys conducted personally by the researcher and financial and temporal reasons made this impossible which resulted in loss of some information for comparative purposes.

Finally, the lack of basic statistical information on number of British and German visitor departures from Istanbul Ataturk and Antalya International Airports by nationality related to same period of previous years as surveys were conducted resulted in very small number of British respondents in Antalya. Although, overall number of departures in a given month was available, there was no statistical information on nationality base.

3.3. Survey Timing and Place Selection

The visitor questionnaire surveys were originally planned to be conducted in August in peak - season and in January in off-season. However, it was later decided that both surveys should be completed in the shoulder months as shifting time of both surveys to shoulder months could be more helpful to achieve the aim and objectives of the study. Therefore, as part of the primary research two off-season or shoulder season visitors questionnaire surveys were planned just before and after the peak season.

To understand the characteristics, motivations and behaviour of visitors in different seasons, visitor questionnaire surveys were conducted in late March and early April 1995 and late November and early December 1995 at two international Turkish airports, namely Istanbul Ataturk and Antalya Airports. 1078 visitors completed the questionnaires (Table 3.1). Although it was relatively easier to get permission from the airport authorities and provincial governor in Antalya, it was very difficult to get it in Istanbul. Different attitudes of the airport authorities, deputy governor responsible from the airport operations and the airport security and bureaucracy between them and as a result the difficulty in getting permission hampered the surveys and caused delays in survey timetable. Originally pre-peak season survey was planned to be completed in March. However, because of the difficulties in getting the necessary permission from the authorities in Istanbul, the survey completed towards the end of March and few days of the survey in Antalya obviously realised in April.

Site selection was dictated by past visitor departure numbers from Turkish airports in the intended survey months. Istanbul and Antalya were chosen as survey places since they are the main gateways of Turkey and majority of foreign visitor departed from these two provinces by air in March, April and December. As indicated on Table 3.3 and 3.4, significant proportion of visitor departures were recorded in survey months. However, as mentioned above, the lack of information on statistics related to departures by nationality resulted in lack of British respondents in Antalya in both shoulders making comparison of visitors by nation and survey place difficult.

These destinations were significantly different from each other, in terms of location, type attractions, number of arrivals and departures and purpose of visit. While Istanbul is preferred for cultural, religious, business and shopping purposes and usually for short-breaks, Antalya is preferred for longer holidays and mainly for coastal tourism. Therefore, it was aimed by the

selection of these sites, contribution of provinces with different attractions and visitor profiles to the improvisation of temporal and spatial patterns could be identified.

3.4. Data Collection Technique

The main data collection techniques to collect data in tourism destinations has included techniques based on counting visitors, cars etc., observation techniques, questionnaire techniques and techniques such as telephone interviews and mail questionnaires.

Techniques based on counting, observation techniques were not appropriate to be employed in this study as the detailed information about departing visitors is needed. Mail questionnaires were not practical because of the difficulties to identify visitors in Britain and Germany who visited Turkey recently and requires very large sampling in a large area of study with a risk of low response rate. Telephone interviews, on the other hand, were not suitable for the same reasons as mail questionnaires with additional high cost structure.

Questionnaire surveys were employed in this study because it is the best method of collecting standardised and comparable information directly from people who have already been to Turkey and have consumed the product subject of this research about their characteristics, profiles, determinants, and motivations. The possibility of conducting in-flight questionnaire surveys among visitors just departed from Turkey was investigated at the beginning, but this option was dropped after Turkish Airlines and other private Turkish airline companies turned down researcher's request.

In person questionnaire administration technique was employed to conduct the surveys. In person questionnaires are handed by the researcher to the respondents who are asked to complete the questionnaires in the researcher's presence and return it (Pizam 1994). The advantages and disadvantages of this method are as follows:

ADVANTAGES	DISADVANTAGES
✓ Relatively inexpensive	✗ Have a low response rate
✓ Assure respondent's anonymity	✗ Restricted to verbal behaviour
✓ Can be administered to a large number of respondents simultaneously	✗ Lack of control over research setting
✓ Eliminate interviewer bias	
✓ Enable standardization and uniformity	

However, some of the disadvantages can be eliminated by careful questionnaire design and planning. The presence of the investigator put pressure on the respondents to complete the questionnaire. Although some language difficulties were experienced when approaching German respondents to ask them to fill in the questionnaire, the introduction text at the beginning of questionnaire explaining the aim of the survey helped them to understand why they were asked to

fill the questionnaire in. To generalise, very few respondents complained about the shortage of time to complete the questionnaire and filled it in. The majority of respondents reacted positively when they were asked to fill in the questionnaire.

Probability or random sampling in which every member of the population has a known chance of being selected and therefore included in the survey (Bournemouth University 1993) would not be appropriate for this survey because chance of a member of the population being selected was not known. Therefore, neither method was employed. According to Calantone and Johar (1984) random sampling from a population of tourists is, practically, an impossible task. Therefore, they utilized sampling in their study which attempted to obtain representation sample through randomizing time and location of questionnaire distribution. Although, randomizing time is possible for this study, randomizing location is not possible because there are only a limited number of departure points. Both survey locations, Istanbul in the North, Antalya in the South, are distant from each other. In this study, judgemental or convenience sampling with randomized day and time was employed. The list of weekly timing of scheduled flights from International Istanbul Ataturk and scheduled and charter flights from Antalya International Airport to Britain and Germany was obtained from the airport authorities. The time of days when flights to Germany and Britain were concentrated or when more British and German visitors could be included in the survey was selected to conduct the surveys.

As Pizam (1994) states, primary data are easy to collect from passengers because departing passengers must pass through the boarding gate and most have free time before boarding to complete questionnaires. The studies of Furr et al. (1992) and Bonn et al. (1992) at airports, had resulted in a high rate of usable response, 96 percent, where the highway exit surveys had resulted only 32 percent response rate, exactly one-third of the airport survey response rate.

In the survey, departure points were chosen for the surveys because tourists have already completed their holidays and have enough impressions about Turkey to talk about and answer the questions. In addition, departing tourists usually have more time and are not in such a rush as arriving tourists. British and German visitors in the last boarding lounge were targeted. Although, this was achieved in Antalya International Airport since the structure of the airport is simple and the main waiting and boarding lounges are combined, the necessary permission could not be obtained from the Istanbul Ataturk Airport authorities for security reasons to enter and conduct surveys in the last boarding lounges. Therefore, only persons who waited in the either waiting or boarding areas after their passport controls were deemed acceptable as respondents. No discrimination was made among respondents. In case of families, they were given only one questionnaire. Children aged under were not allowed to fill in questionnaires, if mistakenly filled in a questionnaire by this age group, it is not included in the study.

Questionnaires were handed to the respondents who were asked to complete the questionnaires in the researcher's presence and collected back. In some cases, the researcher helped respondent to fill in the questionnaire, if needed. Total of 1100 questionnaires were handed to British and German respondents and 1078 questionnaires were filled in and collected back. In other words, the response rate was as high as 98%. Most visitors who were given a questionnaire which was not collected back were British visitors in Istanbul. The reason for this was that visitors checked in late were in rush to get to last boarding area, particularly after the final announcement, and forgot to give filled questionnaires back or not filled in at all and left it in the last boarding lounge before entering the last boarding area. As researcher was not allowed to enter in the final boarding area, visitors could not be asked to fill in the questionnaires.

German visitors dominated in the popular resort province of Antalya. Only a few British visitors were interviewed as there was only one weekly direct flight to London which is an indirect flight from the Turkish Republic of Northern Cyprus to London and majority of the passengers are Turkish and Turkish Cypriot nationals. This indicates that the British tourist market is more seasonal than the German market. The charter flights between Britain and Antalya start in the first month of peak season May. This province is visited for mainly holiday and cultural purposes. On the other hand, Istanbul, as one the off-season survey place, is a cosmopolitan and the largest province, visited by people from all round the world with all types of purposes ranging from business, holiday and culture to visiting friends and relatives and sports. The majority of visitors travel by scheduled flights. German visitors' domination in Istanbul was also seen in Istanbul Ataturk Airport. While there were only three or four daily scheduled flights to Britain depending on the day of the week, there were twelve to fifteen flights to Germany. Turkish nationals and Turkish expatriates who reside in Germany were not included in the surveys.

3.5. Sample Size

Sample size was changed as a result of the exclusion of the August survey when the highest number of completed questionnaires was expected and change of the date of January survey to March-April and inclusion of December in the survey. As the number of tourist arrivals is low in off-season, the number of respondents was also respectively low.

Table 3.1 Survey sample size

	British visitors			German visitors			
	Mar/Apr. 95	Dec. 95	Total	Mar/Apr. 95	Dec. 95	Total	Grand Total
Istanbul	107	120	227	143	103	246	473
Antalya	1	3	4	317	284	601	605
Total	107	120	231	460	387	847	1078

The survey included 231 British (21%), 847 German visitors (79%). In parallel to the total number and proportions of British and German visitor departures in March/April and December 1995 period when the surveys were conducted and visitors' place of visit, purpose of visit and departure airport, British respondents form only 21% of survey population (Table 3.2). As this table shows, the number of British respondents in Antalya in both shoulders is as small as four. This subsequently affected the analysis and comparison of German and British respondents in Antalya and British visitors' characteristics in Istanbul and Antalya and made it impossible. This was resulted from the absence of scheduled and charter flights to and from Britain. British visitors if any use different airlines and times and airports to reach to Antalya and from Antalya to Britain. The main way British respondents use is to fly Istanbul first and catch a domestic flight to access Antalya. Therefore, it was not feasible if not impossible to catch few British respondents in a limited time and financial resources.

Because of the absence of statistical information related to departures on nationality basis, it was not possible to how many British and German visitors departed from each airport. Only overall departures numbers from each airport were available and Istanbul and Antalya were at the highest ranks in terms of overall departures in the past year. As a result by following the weekly indirect flights from Turkish Republic of Northern Cyprus to Britain via Antalya only four British respondents could be reached. However, it is believed that, the lack of (or absence of) British visitors in Antalya, unlike Istanbul, are a significant survey result of on its own to prove spatial and seasonal imbalance in Turkish tourism.

As a consequence, it can be said that the questionnaire surveys covered significant proportion of German and British visitor departures in March, April and December 1995 by choosing Istanbul Ataturk and Antalya International Airports which were the best departure points in survey periods and this is proven by figures shown below (Table 3.3).

Table 3.2 Respondents by shoulder season, place of visit and nationality

	Number of respondents by season, place and nationality																	
	ISTANBUL						ANTALYA						TOTAL					
	Pre.	%	Post	%	Tot.	%	Pre	%	Post	%	Tot.	%	Pre	%	Post	%	Tot	%
British	107	42.8	120	53.8	227	48.0	1	0.30	3	1.00	4	0.70	108	19.0	123	24.2	231	21.4
German	143	57.2	103	46.2	246	52.0	317	99.7	284	99.0	601	99.3	460	90.0	387	75.8	847	78.6
Total	250	100	223	100	473	100	318	100	287	100	605	100	568	100	510	100	1078	100
* Pre=Pre-peak season survey (1st shoulder), Post=Post-peak season survey (2nd shoulder)																		

According to official statistics total of 337189 visitors from all nationalities departed from Istanbul and Antalya International Airports in March, April and December 1995 (Table 3.3). The total survey population of 1078 visitors accounts 0.3 % total departures in this time period (1078/337189). This ratio increases when departures by only British and German considered: from total departures 0.3% to British and German departures 0.9% (1078/116420) (Table 3.4).

Table 3.3 Visitors departures from Istanbul Ataturk and Antalya International Airports in the Survey months in 1995

	Istanbul	% of month	Antalya	% of month	Turkey Total	% of month	% of total 1995 deps.
March 1995	110361	35.8	NA	NA	307827	29.8	4.3
April 1995	NA	NA	71195	16.7	426673	41.2	5.9
December 1995	104514	34.8	51119	17.0	300022	29.0	4.1
Total of above survey months	214875	20.8	122314	11.8	1034522	100	14.3
Turkey Total departures in 1995	1139364	15.7	1844819	25.5	7242249		

On the monthly base, in March, German departures formed 14% of all departures from Istanbul Ataturk Airport and 5% of total countrywide departures. In April, while German departures formed 64% of all departures from Antalya International Airport and 10% of total countrywide departures, British departures formed only 2% and 0.3% of departures respectively. On the other hand, while British visitor departures formed 4% and 6% of departures from Istanbul Ataturk International Airport in March and December 1995 respectively, it was recorded as 1% and 2% in total countrywide departures.

Table 3.4 Visitor departures from Istanbul Ataturk and Antalya International Airports in 1995 by nationality

	Istanbul						Antalya					
	British	% of month	German	% of month	All depar's	Turkey Total	British	% of month	German	% of month	All depar's	Turkey Total
March	4371	3.96	15406	14.0	110361	307827	*	*	*	*	*	*
April	*	*	*	*	*	*	1190	1.67	45393	63.75	71195	426673
December	6480	6.20	18500	17.7	104514	300022	**	**	25080	49.06	51119	300022
Total survey months	10851	5.05	33906	15.8	214875	607849	1190	0.97	70473	57.61	122314	726695

* Survey not conducted in this month, thus figures not applicable for comparison
** Figures not available either there was no departures registered or ignorable few people departed

The share of departures from these airports in December indicates differences from the first shoulder departures. It is worth noting that no or ignorable very small number of British citizens departed from Antalya in December unlike April. 49% of all departures from Antalya International Airport and 8% of total countrywide departures formed by German nationals in December.

In parallel to the decrease in overall departures from Turkey in December compared to April which was 30%, almost the same decrease was seen in overall departures from Antalya Airport (28%). However, the decrease in the number of German departures from Antalya Airport was much greater, 45%. In contrast, German and British departures indicated an increasing trend in December compared to March, despite small decreases in overall departures from Istanbul Ataturk Airport and Turkey. While the number of departing German visitors from Istanbul increased 20% in December, British visitors indicated even greater increase which was 48%. The Christmas vacation

in December and intensity of short-break packages in this time of the year would be the causal factor for these increases.

Table 3.5 Visitors arrivals to Turkey, 1995

	British				German				Total (British + German)			
	Total Arrivals		Air Arrivals		Total Arrivals		Air Arrivals		Total Arrivals		Air Arrivals	
March	5240	13.2	4774	14.0	52595	22.4	51562	22.9	57835	21.06	56336	21.8
April	27104	68.2	22317	65.6	124950	53.18	116989	52.1	152054	55.36	139306	53.8
December	7361	18.6	6921	20.4	57422	24.4	56153	25.0	64783	23.58	63074	24.4
Total of 3month period	39705	100	34012	100	234967	100	224704	100	274672	100	258716	100

Originally visitors from three major tourist markets to Turkey were considered to be surveyed, British, German and French. Although, questionnaires were prepared in these three languages, later, it was decided that focusing on the two of these three markets would provide much help and better comparison. In addition, it was not viable to survey all three markets because of financial and time constraints as well as difficulties in designing and translation of survey results. In the end, French tourism market is excluded from the study.

3.6. Questionnaire Design

Peterson (2000) states that the quality of the information obtained from a questionnaire is directly proportional to the quality of the questionnaire, which in turn is directly proportional to the quality of the question construction process. The design of a questionnaire is possibly the most challenging element for both students and professionals in marketing research as Ambrose and Anstey (2001) claims.

> "*The first task in constructing an effective. questionnaire is to review and understand the information requirement of the problem, opportunity, or decision that led to the need for a questionnaire. Unless a researcher understands the information requirements - what information is needed and how that information will be used - no attempt should be made to construct a questionnaire. The effort would be a waste of time for the researcher and the results would be of little value*" (Peterson 2000, p.15).

Therefore, design process and translation of it into German language took very long time to reach final state of the questionnaire.

Although, questions were mostly in a close-ended format, other formats such as open-ended questions were also employed where necessary. Originally, face-to-face interviews were planned to conduct the questionnaire surveys, but later, it was decided that the language and communication difficulties in conducting face-to-face interviews with international tourists who all have different backgrounds, cultures and languages would not permit the study to reach its aim and objectives. It was also thought that if certain groups, for example, English speaking groups were chosen for face-to-face interviews to eliminate language barrier, the sample would not be representative. Therefore,

in person questionnaire survey method was chosen. The questionnaire included total of 33 questions in five sections and four pages. The folded A3 size paper used and A4 size first and last pages placed on the front side of paper and second and third pages were placed on interior pages. Easily readable letters and letter sizes were used.

The questionnaire survey was designed to assess demographic profile, travel motivations, travel organization methods, temporal and spatial preferences and future intentions of British and German visitors. This was accomplished by ascertaining the following:

- Demographic profile of British and German visitors in Istanbul and Antalya in shoulder seasons.
- Basic information and travel motivations of visitors concerning their present trip.
- Travel organization methods and expenditure patterns.
- Temporal and spatial preferences of visitors if they were free to choose.
- Information related to past visit of repeat visitors
- Future intentions and opinions, complaints and recommendations of visitors.

The questionnaire was divided into five parts. Each part was designed to ascertain information to fulfill the objectives outlined above. Part One, titled '*About you and your family*', requested respondents' specific demographic details to enable visitor profiles to be constructed in each survey place and shoulder season. The questions of nationality, country of residence, age, gender, employment status, occupation, educational, income and marital status, and information on traveling companions were asked.

Part Two titled '*About your present trip to Turkey*' was specifically concerned with the travel motivations, movements in Turkey, amount of expenditures, preferred accommodation types, influential factors, sources of information, travel organization methods. It asked respondents to indicate their travel motivation in an open-ended question so that respondents indicate their motivation freely. The question related to expenditure patterns of visitors was also open-ended which allows respondent to write the exact expenditure down. In this section a map of Turkey was included so that respondents can reply the Question 15 which was about the provinces respondents visited and the number of nights spent in each visited province. It was found very helpful by the respondents.

In Part Three respondents were asked in closed questions to tick which regions and at what time they would prefer to visit if they were free to choose and the reasons behind their preference were sought in an open-ended question. Part Four was about repeat visitors' past visit to Turkey, its timing, place and influential factors.

Part Five titled '*Your opinion and comments*' was concerned with the future intentions of visitors about visiting Turkey again and their positive and negative comments, complaints and recommendations.

There were no problematic questions for respondents. However, some respondents left some questions blank, such as the amount of expenditures incurred in Turkey and package tour expenditures, because they did not know the exact amount or they did not wish to answer. In addition, the answers of German respondents to open-ended questions caused some difficulties in reading and interpreting it to English. Although open-ended questions give respondents flexibility and freedom in their reply, it would be better if all the questions were close-ended from the analyses point of view. Open-ended questions in a multi-national surveys, like this study, would cause reading and interpretation difficulties which may lead to misinterpretation of the results during analysis. Closed-ended questions are very popular because they provided a greater uniformity of responses and are more easily processed and can often be transferred directly into a computer format. Open-ended responses, on the other hand, must be coded before they can be processed for computer analysis often requires that the researcher interpret the meaning of responses, opening the possibility of misunderstanding and researcher bias. There is also a danger that some respondents will give answers that are essentially irrelevant to the researcher's intent (Babbie, 1989).

3.7. The Analysis of Surveys

As Fink (1995) states, the most commonly used method of comparing proportions is chi-square ($\chi 2$) distribution which tests the null hypothesis that proportions are equal. Crosstabulation and chi-square helps researcher to classify interviews in terms of their answers to two or more questions and explore attitudes towards different subjects in depth. First of all, one or more null hypotheses are established; i.e. there is no relationship exists between variable X and variable Y. or there is a relationship between them.

The data was coded and analysed utilising the SPSS package. A categorical coding regime was used throughout the analysis to meet the aims and objectives of the study. A Chi Square Matrix was derived from the Pearson Values (or P Values) in Chi Square analysis tables on the SPSS (Statistical Package for Social Sciences). In this matrix, first, all variables analysed by all variables one by one and chi-square values were computed. Then most important variables and statistically significant results were selected and included in the table. Level of significance for one tailed test is determined as 0.05. Therefore all numbers between '0' zero and 0.05 are enough to reject null hypothesis. Observed significance values over 0.05 are not accepted as significant and therefore null hypothesis is not rejected. Closer the observed statistical significance value to the value of '0' zero more significant that is.

On the other hand, frequency tables were produced by using SPSS frequency analysis and crosstabulation options. Only one variable is used in the frequency analysis whilst crosstabulation analysis requires more than one variable. Frequency analysis simply reveals the number, percentage of responses in each category. In some difficult situations where the frequency analysis is not enough to explain differences in each category of responses, and relationships with other variables are required, crosstabulation analysis is used to determine the degree of relationship between two variables.

However, sometimes 2 x 2 crosstabulation tables still cannot show the main reasons for a significant relationship or difference. In this case, as Babbie and Halley (1995) say, there is a need for simultaneous analysis of three or more variables which is one of the "multivariate" analysis techniques. In this analysis, 2 x 2 variable table is controlled for a specified variable and each category of that specific variable. For example, number of

i) university graduate ii) employers iii) by nationality

can be computed. Simultaneous impact of nationality and education level on employment status can be examined by making simple modifications to the basic cross-tabulation procedure. The result gives a much greater scope for the analysis of relationships between three variables.

The open-ended questions caused some difficulties during the analysis. Grouping responses in certain headings was very difficult. Chi-Square analysis was not possible for questions with multiple responses.

CHAPTER 4

The Off-Season Visitor Surveys

Primary Market Characteristics

It has been emphasised that temporal and spatial irregularities and imbalanced distribution of demand and supply in tourism industry raises great concern among tourism officials, private entrepreneurs, employees and academics. Some literature indicates a different approach to the subject by advocating that the imbalanced tourism activities in time and space could provide an opportunity to recover the environment to regenerate itself and restrict development to preserve some areas' peculiar characteristics. Concentration of tourism in peak season, imbalanced tourism receipts, lower occupancy rates, difficulties in achieving the break-even point, and concentration of supply in few places and lack of tourism investments in remaining regions despite its potential, on the other hand, push all parties involved to find a solution which will satisfy all parties. Several causal factors and different ways of tackling the temporal and spatial imbalance problem were discussed.

This study was conducted to assist the tourism industry in finding a solution to temporal and spatial imbalance in tourism by investigating the background of imbalanced distribution of demand in time and space and proposing applicable solution approaches. Although some proposed solutions can be applicable to all destinations, the causes of the imbalanced tourism at the background can inevitably be different from each other as they all demonstrate unique characteristics and therefore they all require specific investigation and solutions. This chapter aims to contribute to the Turkish tourism industry by analysing the off-season British and German visitors' characteristics, travel motivations, influential factors on timing of travel, information sources used, seasonal and spatial preferences of visitors if free to choose, travel organization, preferences of visitors while in Turkey, past visit characteristics of repeat visitors and future intentions and provide a base for the applicable solution proposals.

4.1. Demographic profile of respondents

Surveys were conducted only among British and German respondents. It was found from the demographic data that the expected significant relationships ($p <= 0.05000$) exist between almost all variables with few exceptions (Table 4.1). Except for gender, family status and having children at home and their number all other variables indicate significant differences between British and German visitors. This suggests significant demographic differences exist between British and German off-season visitors such as age, employment, education and income. Essentially, this will affect tourism marketers' decision and policy, strategy and tactics while marketing and promoting Turkey in these important tourist-generating countries.

Table 4.1 Chi-square significance test ($\chi 2$ or p values) matrix

Probability values less than 0.05000 from $\chi 2$ tests of demographic variables

	Nation								
Gender	*.79748*	Gender							
Age	**.00012**	**.00000**	Age						
Employment	**.00000**	**.00000**	**.00000**	Employment					
Education	**.00000**	**.00000**	**.00000**	**.00000**	Education				
Income	**.00000**	**.00000**	**.00000**	**.00000**	**.00000**	Income			
Family status	*.25723*	**.00019**	**.00000**	**.00000**	**.00000**	**.00000**	Family status		
Children home	*.79819*	*.19576*	**.00000**	**.00001**	*.26904*	**.03112**	**.00000**	Children at home	
No of children	*.12976*	*.80946*	**.01003**	*.32238*	*.95271*	*.85240*	*.98703*	NA	No of children
Accompanied or Alone	**.00000**	**.00000**	**.00000**	**.00000**	**.00000**	**.00000**	**.00000**	**.00000**	**.00001**

Gender

Although the share of the male respondents in total is higher than the share of female respondents by about 13%, there are no significant differences within the British and German respondent groups in terms of distribution of male and female population (Table 4.2). In the case of families, there was no gender discrimination between husband and wife respondents. Male respondents 56%, female respondents account about 44% of total respondents. More or less the same balance is also seen in the share of females and males within British and German respondents. Therefore, Chi-square analysis did not indicate any significant difference or relationship between the nationality and gender.

Table 4.2 Gender of respondents by nationality

	Male		Female		Total	
	N	%	*N*	%	*N*	%
British	132	21.7	99	21.1	231	21.4
German	476	78.3	371	78.9	847	78.6
Total	608	100	470	100	1078	100
	N 1078 p= 0.79748 >0.05					

While there was no statistically significant difference observed between shoulder seasons (p=0.84905, p=0.29629, p=0.30397), rather important gender differences were confirmed among German nationals and overall number of males and females in Istanbul and Antalya, except for British nationals (p=0.77089, p=0.01626, p=0.03302) (Table 4.3).

The share of German males in Istanbul (63%) is considerably higher than the German females (37%), indicating 26% difference. Similar situation is observed among British gender groups in Istanbul, too. In contrast, the difference between both German gender groups is very small in Antalya (7%). This could be explained by the superiority of businessmen and business related visits in Istanbul and the high percentage of holidaying German married and couple family groups in Antalya. The same difference was reflected to total respondents as well.

Table 4.3 Gender and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Male	130	57.3	2	50.0	154	62.6	322	53.6	284	60.0	324	53.6
Female	97	42.7	2	50.0	92	37.4	279	46.4	189	40.0	281	46.4
Total	227	100	4	100	246	100	601	100	473	100	605	100
	N 231 p=0.77089 >0.05				N 847 p=0.01626< 0.05				N 1078 p=0.03302< 0.05			

Age groups

Crosstabulation analysis indicates that there are significant demographic differences between British and German visitors. One them is age profile of respondents (p= 0.00012). In general, the age distribution of German visitors follows a similar pattern to the total off-season visitors.

Table 4.4 Age group distribution

	British			German			Total		
	N	%	Cum.	*N*	%	Cum.	*N*	%	Cum.
0 - 15	-	-	-	8	0.9	-	8	0.74	-
16 - 24	9	3.	-	107	12.6	13.6	116	10.8	11.5
25 - 34	70	30.4	34.3	220	26.0	39.5	290	26.9	38.4
35 - 44	37	16.1	50.4	155	18.3	57.8	192	17.8	56.3
45 - 54	72	31.3	81.7	173	20.4	78.3	245	22.8	79.0
55 - 64	32	13.9	95.6	132	15.6	93.9	164	15.2	94.3
65 +	10	4.4	100	52	6.1	100	62	5.8	100
Total	230	21.4		847	78.6		1077	100	100
				N 1077 p= 0.00012< 0.05					

The age group distribution (Table 4.4) indicates relatively middle-aged, mature off-season market. About 56% of all these visitors fall into 35-64 age group. 61% of British and 54% of German visitors are aged between 35 and 64, suggesting that British off-season market is more mature than the German market. In other words, the German market is younger than British with only around 4% of British respondents are aged under 24, German respondents aged under 24 form 14% of German visitors.

It is also worth noting the large proportion of active working 25-54 age groups. 78% of British, 65% of German and 68% of total visitors are in this group. In both nationality groups, 25-34 and 45-54 age groups occupy the top two ranks in the percentage columns. However, while percentage shares of these two age groups of British nationals are almost same, 30% 25-34 and 31% 45-54, the largest share among German nationals' belongs to 25-34 year-old group, 26%, and it is followed by second largest age group, 45-54 age group 20 share. As illustrated on Table 4.4, age groups seem rather evenly distributed among German respondents compared to British respondents. However, this cannot be said for the British respondents and 25-34 and 45-54 age groups indicate sharp peaks.

Table 4.5 Age groups and survey place by nationality, and total respondents

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
0 - 15	-	-	-	-	-	-	8	1.3	-	-	8	1.3
16 - 24	9	4.0	-	-	28	11.4	79	13.1	37	7.8	79	13.1
25 - 34	68	30.1	2	50.0	65	26.4	155	25.8	133	28.2	157	26.0
35 - 44	37	16.4	-	-	56	22.8	99	16.5	93	19.7	99	16.4
45 - 54	72	31.9	-	-	53	21.5	120	20.0	125	26.5	120	19.8
55 - 64	32	14.2	-	-	35	14.2	97	16.1	67	14.2	97	16.0
65 and over	8	3.5	2	50.0	9	3.7	43	7.2	17	3.6	45	7.4
Total	226	100	4	100	246	100	601	100	472	100	605	100
	N 230 p=0.00039< 0.05				N 847 p=0.07140 >0.05				N 1077 p=0.00011< 0.05			

Age groups of total respondents indicate very small and ignorable differences in first and second shoulders. Apart from 25-34 age group 3%, 45-54 age group 4% increase and 35-44 age group 2% and 55-64 age group 3% decrease in second shoulder, others indicated around 1% or less change between shoulders. On the other hand, age groups indicated statistically very significant differences by place of visit (p= 0.00011 < 0.05) (Table 4.5). While younger (0-24) and older age groups (55+) preferring Antalya as a place of visit, middle age group (25-54) visitors choose Istanbul. This also reflects the tendency of German age groups as well. The reason for this tendency would be the presence of attractions in Antalya such as sea-sun-sand, passive and active leisure and recreational activities, sightseeing and historical sites that some are sought by young, some by older people. On the other hand, although Istanbul has the capability to cater for all age groups, specifically middle-aged group would prefer Istanbul for various reasons such as business, culture, history, conferences, visiting friends and relatives, special exotic atmosphere of Istanbul and various other purposes.

Table 4.6 Age groups and survey place by main purpose of visit

	ISTANBUL (%)							ANTALYA (%)						
	Holiday	Cultural	Business	VFR	Other	*N*	Total	Holiday	Cultural	Business	VFR	Other	*N*	Total
0-15	-	-	-	-	-	-	-	100	-	-	-	-	*8*	1.3
16-24	73.0	2.7	8.1	2.7	13.5	*37*	8.0	92.3	3.8	-	2.6	1.3	*78*	13.0
25-34	51.9	3.8	32.3	6.8	5.2	*133*	28.6	95.5	1.9	1.9	0.6	-	*156*	26.1
35-44	51.7	9.0	31.5	1.1	6.7	*89*	19.1	95.9	3.1	1.0	-	-	*97*	16.2
45-54	58.9	2.4	32.3	3.2	3.2	*124*	26.7	93.3	4.2	-	-	2.5	*119*	19.9
55-64	58.5	4.6	24.6	7.7	4.6	*65*	14.0	99.0	-	-	-	1.0	*96*	16.1
65+	76.5	11.8	11.8	-	-	*17*	3.7	93.2	6.8	-	-	-	*44*	7.4
Total	57.2	4.7	28.4	4.3	5.4	*465*	100	95.2	2.8	0.7	0.5	0.8	*598*	100
	N 465, p = 0.10496 > 0.05							N 598, p = 0.23047 > 0.05						
	N 1063 p= 0.24494 >0.05													

As expected Table 4.6 indicates while more than 90% of all age groups prefer Antalya for holiday/vacation purposes, this percentage comes down to 50% to 76% in Istanbul and other visit purposes such as culture, V.F.R. and business occupy an important place in Istanbul compared to

Antalya. While more than 70% 16-24 and 65+ age groups prefers Istanbul for holiday purposes, other age groups' holiday purpose ranges around 50% but other purposes come forward among these age groups. In contrast, all age groups' primary purpose of visit is holiday in Antalya and other purposes have an ignorable place. However, there is no adequate information available related to British age groups in Antalya to compare age groups in Istanbul and Antalya.

Employment status

There are significant differences between nationality groups in terms of distribution of employment status groups (p=0.00000). It is evident from the Table 4.7 that largest section of respondents is office workers, 49%. The other largest groups are identified as self-employed (12%) and retired groups (11%).

Table 4.7 Employment status

	British		German		Total	
	N	%	*N*	%	*N*	%
Employer	30	13.1	18	2.1	48	4.5
Self-employed	42	18.3	85	10.1	127	11.8
Manual worker	14	6.1	70	8.3	84	7.8
Office worker	88	38.4	433	51.3	521	48.6
Unemployed	6	2.6	9	1.1	15	1.4
Student	6	2.6	66	7.8	72	6.7
Retired	19	8.3	100	11.9	119	11.1
Housewife	14	6.1	52	6.2	66	6.2
None of Above	10	4.4	11	1.3	21	2.0
Total	229	21.3	844	78.7	1073	100
	N 1073 p= 0.00000< 0.05					

However, while more than half of German respondents (51%) are office workers, share of office workers in all British employment groups is about 38%. In contrast, while more than 31% of British visitors are either employer or self-employed, this percentage comes down to only 12% for German nationals. The reason for this is that as will be seen below on tables in the following sections related to visitors' purpose of visit, 32% of British visitors' main purpose of visit is 'business', compared to German visitors, only 8%. In sum, it can be said that employers and self-employed visitors form the second important British market after office workers. The other difference is between British and German students. British students form only 3% of all British nationals compared to 8% German students. Of course, here, distance, transportation facilities and cost of travel and timing of school or university holidays must be taken into consideration for sound comparisons.

Table 4.8 Employment status and shoulder season by nationality, and total respondents

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Employer	14	13.2	16	13.0	13	2.8	5	1.3	27	4.8	21	4.1
Self-employed	20	18.9	22	17.9	49	10.7	36	9.3	69	12.2	58	11.4
Manual work.	6	5.7	8	6.5	30	6.6	40	10.4	36	6.4	48	9.4
Office worker	45	42.5	43	35.0	224	48.9	209	54.1	269	47.7	252	49.5
Unemployed	2	1.9	4	3.3	5	1.1	4	1.0	7	1.2	8	1.6
Student	4	3.8	2	1.6	47	10.3	19	4.9	51	9.0	21	4.1
Retired	4	3.8	15	12.2	54	11.8	46	11.9	58	10.3	61	12.0
Housewife	7	6.6	7	5.7	28	6.1	24	6.2	35	6.2	31	6.1
None of Above	4	3.8	6	4.9	8	1.7	3	0.8	12	2.1	9	1.8
Total	106	100	123	100	458	100	386	100	564	100	509	100
	N 229 p=0.48994 >0.05				N 844 p=0.02497< 0.05				N 1073 p=0.06945 >0.05			

From the place and seasonal point of view, significance of employment by place of visit and by time of visit does not differ very much. No worth noting differences exist when employment status evaluated by shoulder season with an exception of German visitors (p=0.02497) (Table 4.8). On the other hand, employment statuses of British and German respondents do not indicate significant differences in Istanbul and Antalya (Table 4.9). However, when overall respondents are evaluated, significant difference exist between respondents in Antalya and Istanbul, which is possibly resulted from the different purpose of visit in both destinations.

Table 4.9 Employment status and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Employer	30	13.3	-	-	N	%	N	%	36	7.6	12	2.0
Self-employed	42	18.7	-	-	6	2.4	12	2.0	67	14.2	60	10.0
Manual worker	14	6.2	-	-	25	10.2	60	10.0	30	6.4	54	9.0
Office worker	86	38.2	2	50.0	16	6.5	54	9.0	227	48.2	294	48.8
Unemployed	6	2.7	-	-	141	57.3	292	48.8	8	1.7	7	1.2
Student	6	2.7	-	-	2	0.8	7	1.2	26	5.5	46	7.6
Retired	17	7.6	2	50.0	20	8.1	46	7.7	37	7.9	82	13.6
Housewife	14	6.2	-	-	20	8.1	80	13.4	28	5.9	38	6.3
None of Above	10	4.4	-	-	14	5.7	38	6.4	12	2.5	9	1.5
Total	225	100	4	100	2	0.8	9	1.5	471	100	602	100
	N 229 p=0.21068 >0.05				N 844 p=0.18266 >0.05				N 1073 p=0.00002< 0.05			

Education level

Contrast between the nationalities strikes the eye once again in the analysis of education level of respondents (p= 0.00000). The majority of off-season (shoulder season) visitors to Turkey had had education up to university level, 60%. On the other hand, 38% university and postgraduate level educated visitors occupy a considerable place, as well. However, nationality breakdown shows differences between nationalities in terms level of education visitors received.

Table 4.10 Education level

	British		German		Total	
	N	%	*N*	%	*N*	%
Element. /Primary	1	0.43	431	51.8	432	40.6
Second/High	59	25.5	150	18.0	209	19.7
College/University	125	54.1	202	24.3	327	30.8
Postgraduate	44	19.1	37	4.5	81	7.6
None of Above	2	0.9	12	1.4	14	1.3
Total	231	100	832	100	1063	100
	N 1063 p= 0.00000< 0.05					

Table 4.10 above reveals that British shoulder season visitors were very well educated in contrast to the German visitors. While 73% of British visitors had had university and postgraduate level education, in contrast, significant portion of the German visitors, 70%, received education up to university level.

Table 4.11 Employment status and education level by nationality

	BRITISH (%)							GERMAN (%)						
	Prim.	Second	Univ.	PG	None	Total		Prim.	Second	Univ.	PG	None	Total	
Employer	-	33.3	43.3	23.3	-	13.1		38.9	16.7	38.9	5.6	-	2.2	
Self-employed	2.4	11.9	57.1	26.2	2.38	18.3		41.2	16.5	31.8	10.6	-	10.3	
Manual worker	-	28.6	71.4	-	-	6.1		86.4	9.1	3.0	-	1.5	8.0	
Office worker	-	23.9	58.0	18.2	-	38.4		51.6	15.5	28.0	4.86	-	52.1	
Unemployed	-	-	66.7	33.3	-	2.6		66.7	33.3	-	-	-	1.1	
Student	-	-	83.3	16.7	-	2.6		9.4	64.1	20.3	3.1	3.1	7.7	
Retired	-	36.8	42.1	15.8	5.3	8.3		55.8	6.3	28.4	4.2	5.3	11.5	
Housewife	-	57.1	35.7	7.1	-	6.1		74.0	14.0	8.0	-	4.0	6.0	
None of Above	-	40.0	40.0	20.0	-	4.4		44.4	33.3	-	-	22.3	1.1	
Total	0.4	25.8	54.1	18.8	0.9	100		51.7	18.1	24.2	4.5	1.4	100	
	N 229, p = 0.29028 < 0.05							N 829, p = 0.00000 < 0.05						
	N 1058 p= 0.00000													

However, main purpose of visit and employment status of visitors must be taken into consideration when making these comparisons. Although, 32% business orientated and 31% employer and self-employed British visitors, who are assumed to be high level educated, contrasted to 8% and 13% German visitors respectively, may be shown as the main reason for the large number of university and postgraduate educated British visitors, there is not enough evidence to prove this thesis. Table 4.11 indicates that while the overall education level of all British employment groups are considerably high, German visitors' education level tends to be well below the British respondents. Thus, it can be generalised that off-season British visitors are well educated compared to German visitors.

Table 4.12 Education level and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Element. /Primary	-	-	1	0.8	208	46.2	223	58.4	208	37.3	224	44.4
Second/High	29	26.9	30	24.4	97	21.6	53	13.9	126	22.6	83	16.4
College/University	62	57.4	63	51.2	118	26.2	84	22.0	180	32.3	147	29.1
Postgraduate	17	15.7	27	22.0	22	4.9	15	3.9	39	7.0	42	8.3
None of Above	-	-	2	1.6	5	1.1	7	1.9	5	0.9	9	1.8
Total	108	100	123	100	450	100	382	100	558	100	505	100
	N 231 p=0.36170 >0.05				N 832 p=0.00589< 0.05				N 1063 p=0.02457< 0.05			

Table 4.13 indicates German visitors' education level in Istanbul and Antalya differs significantly. The level education of German visitors to Istanbul is much higher than Antalya. This can be explained by that German visitors' main purpose of visit to Istanbul is business and culture rather than holiday. On the other hand holidaying visitors prefer Antalya and their level of education is much lower than visitor' to Istanbul.

Table 4.13 Education level and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Element. /Primary	1	0.4	-	-	93	38.1	338	57.5	94	20.0	338	57.1
Second/High	57	25.1	2	50.0	46	18.9	104	17.7	103	21.9	106	17.9
College/University	124	54.6	1	25.0	91	37.3	111	18.9	215	45.6	112	18.9
Postgraduate	43	18.9	1	25.0	13	5.3	24	4.1	56	11.9	25	4.2
None of Above	2	0.9	-	-	1	0.4	11	1.9	3	0.6	11	1.9
Total	227	100	4	100	244	100	588	100	471	100	592	100
	N 231 p=0.78717 >0.05				N 832 p=0.00000< 0.05				N 1063 p=0.00000< 0.05			

Income status

To find out respondents' annual family income, respondents were asked to indicate their family income in their national currencies, £ for British, DM for German visitors. When designing the questionnaire, first income groups for British families were identified and then these categories were adapted to German families by converting Sterling (£) into German Mark (DM). Therefore, each category indicates the same level of family income for all British and German respondents so that both nations' family income levels can be compared to each other easily.

As Table 4.14 indicates, the majority of British and German respondents' family income level is above average (66% above £16000). The largest respondent group (29%) earns more than £30000 each year. As seen on the table, share of each income group in total increases (from 8% to 29%) along with (in parallel to) the amount of family income (from under £5000 to over £30000).

Table 4.14 Family income level

	British		German		Total	
	N	%	*N*	%	*N*	%
Under £5000	2	1.0	65	9.8	67	7.6
£5000 - £10000	11	5.1	90	13.5	101	11.4
£11000 - £15000	22	10.1	112	16.8	134	15.2
£16000 - £20000	24	11.0	127	19.1	151	17.1
£21000 - £30000	39	17.9	134	20.1	173	19.6
Over £30000	120	55.1	138	20.7	258	29.2
Total	218	100	666	100	884	100
	N 884 p= 0.00000< 0.05					

Compared to German visitors, British visitors have higher annual family income. While 60% of German visitors have annual income above average, this percentage increases to high 84% for British visitors. It is also worth noting that there are not wide gaps between German income groups in terms of their share in total, ranging from 10% to 21%. However, the gap between income groups widens among British visitors, from 1% to 55%.

Table 4.15 Income status and main purpose of visit by nationality (%)

	BRITISH (%)						GERMAN (%)					
	Holiday	Cultural	Business	Visiting Friends	Total	*N*	Holiday	Cultural	Business	Visiting Friends	Total	*N*
Under £5000	0.8	-	6.7	-	0.9	*2*	10.5	3.6	28.6	10.5	9.7	*64*
£5000-10000	5.0	-	20.0	-	5.1	*11*	13.3	7.3	42.9	15.6	13.2	*87*
£11000-15000	13.2	2.9	20.0	-	10.2	*22*	18.7	-	28.6	15.6	17.0	*112*
£16000-£20000	14.9	4.3	20.0	-	11.1	*24*	19.8	7.3	-	25.0	19.0	*125*
£21000-£30000	13.2	24.3	6.7	50.0	17.1	*37*	20.4	27.3	-	15.6	20.3	*134*
Over £30000	52.9	68.6	26.7	50.0	55.6	*120*	17.3	54.5	-	21.9	20.8	*137*
Total	56.0	32.4	6.9	0.9	100	*216*	83.5	8.3	1.1	4.9	100	*659*
	N 216, p = 0.00043< 0.05						N 659, p = 0.00012< 0.05					
	N 875 p= 0.00000< 0.05											

Since only respondent's annual total family income was asked (not his/her individual income), it is difficult to identify what employment status group, age or gender group earns the highest or lowest income. For example, if a housewife states that her annual family income is more than £30000, it is difficult or wrong to assume that she earns this money. She or one or more members of family members jointly may earn this amount of money. However, it is possible to analyse relationships between income and personal responses given by person who fills in the questionnaire. In this respect, analysis of income groups by purpose of visit and nationality reveals that there are significant differences between both nations in terms of income level and main purpose of visit (Table 4.15). While 84% of German nationals visit Turkey for holiday/Vacation purposes, this percentage comes down to 56% and cultural visit purpose (32%) emerges beside holiday purpose of visit for British visitors.

Income distribution between these nations also indicates interesting results. 81% of all British respondents whose main purpose of visit is holiday/vacation have income more than average (above £16000), compared to 58% of German visitors. The size of each income group differs between each purpose of visit groups. While it is distributed more evenly among holidaying German nationals, ranging from 11% to 20%, in contrast, a wide gap is seen (53-1=52%) between the lowest and highest income groups among holidaying British visitors. This means that majority of holidaying British visitors are rather rich (53% over £30000), compared to 17 % of rich holidaying German visitors (Table 4.15).

Table 4.16 Income status and time of visit by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Under £5000	1	1.0	1	0.9	38	10.7	27	8.7	39	8.5	28	6.6
£5000 - £10000	3	3.0	8	6.8	45	12.6	45	14.5	48	10.5	53	12.4
£11000 - £15000	5	5.0	17	14.5	64	18.0	48	15.5	69	15.1	65	15.2
£16000 - £20000	11	10.9	13	11.1	59	16.6	68	21.9	70	15.3	81	19.0
£21000 - £30000	17	16.8	22	18.8	67	18.8	67	21.6	84	18.4	89	20.8
Over £30000	64	63.4	56	47.9	83	23.3	55	17.7	147	32.2	111	26.0
Total	101	100	117	100	356	100	310	100	457	100	427	100
	N 218	p=0.10773 >0.05			N 666	p=0.19764 >0.05			N 884	p=0.21100 >0.05		

The same imbalance strikes the eye again between both nations in terms of business and V.F.R. (visiting friends and relatives) purposes. While German businesspersons belong to lower income categories although they represent a tiny fraction of total German visitors, British businesspersons shows an even distribution between income groups. The even distribution between income groups was also seen among German respondents whose main purpose is visiting friends and relatives. Cultural purpose of visit and income correlation shows more or less same distribution trend between British and German visitors. Cultural visitors seem to have high annual family income and £30000 annual family income group form the largest cultural purpose group (69% for British and 55% for German visitors).

No considerable statistical significance was seen between income and the time of visit as row and column percentages are very close to each other in both shoulder months with an exception of few (Table 4.16). Although, there were some changes in family income level among first and second shoulder season British visitors, the proportion of family income groups in both shoulders among German visitors do not differ considerably. In parallel to these statements, no significant differences (or changes) has been noted in family income level of all nationalities between the first and second shoulder seasons ($p= 0.21100 > 0.05$).

However, as Table 4.17 confirms, there are significant differences in income levels when two nations compared to each other in the first and second shoulders. Although, Table 4.17 is almost

the same as Table 4.16, it approaches the analysis from a different perspective, which is the shoulder seasons instead of nationalities. It also reaches to different conclusions from Table 4.16 in terms of statistical significance levels. While each nationality does not indicate statistical difference when shoulder seasons compared to each other (p=0.10773 and p=0.19764 > 0.05, (Table 4.16), in contrast, comparison of nationalities in each shoulder season indicate highly significant differences (p=0.00000 and p=0.00000 < 0.05, (Table 4.17).

Table 4.17 Income status and nationality by shoulder season

	1st shoulder				2nd shoulder				Total			
	British		German		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
Under £5000	1	1.0	38	10.7	1	0.9	27	8.7	2	0.92	65	9.8
£5000 - £10000	3	3.0	45	12.6	8	6.8	45	14.5	11	5.0	90	13.6
£11000 - £15000	5	5.0	64	18.0	17	14.5	48	15.5	22	10.1	112	16.8
£16000 - £20000	11	10.9	59	16.6	13	11.1	68	21.9	24	11.0	127	19.1
£21000 - £30000	17	16.8	67	18.8	22	18.8	67	21.6	39	17.9	134	20.1
Over £30000	64	63.4	83	14.7	56	47.9	55	17.7	120	55.1	138	20.8
Total	101	100	356	100	117	100	310	100	218	100	666	100
	N 457 p=0.00000< 0.05				N 427 p=0.00000< 0.05				N 884 p=0.00000< 0.05			

Majority of British visitors occupy the highest rank of the income groups (Table 4.17). 63% in the first shoulder and 48% of British visitors in the second shoulder season have more than £30000 annual family income. While 9% of British visitors' family income is below average in the first shoulder season, it increases to 22% in the second shoulder season. On other words, the income level of British visitors decrease in the second shoulder. Majority of German and British visitors have above average family income. However, the proportion of visitors who have above average family income and who have below average family income differs between the two nations. This ratio is 10 times (9% below average, 91% above average) in the first shoulder, 3.5 times (22% and 78%) in the second shoulder for British visitors and 1.4 times in the first shoulder (41% and 59%) and 1.6 times in the second shoulder (39%-61%) for German visitors. As seen, while the share of British visitors who have above average family income decreases from 91% in the first shoulder to 78% in total in the second shoulder, the share of German visitors indicates a small increase from 59% in the first shoulder to 61% in the second shoulder. Furthermore, each income groups' share in total does not differ in the both shoulders, either, 66% for the first shoulder and 66% for the second shoulder for above average family income groups.

Family income levels can be evaluated from other perspectives by analysing distribution of income groups by nationality and place of visit. A significant relationship is observed between income level of all visitors and their place of visit (p=0.00000 < 0.05). As total column percentages on (Table 4.18) shows, the visitors to Istanbul (77% above average income) are richer than the visitors to Antalya (56%). In contrast to income level of visitors to Istanbul, a balance has been seen between income groups in terms of the share of each income group in total in Antalya.

Table 4.18 Income status and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Under £5000	2	0.9	-	-	20	9.8	45	9.8	22	5.3	45	9.7
£5000 - £10000	10	4.7	1	25.0	22	10.7	68	14.8	32	7.6	69	14.8
£11000 - £15000	20	9.3	2	50.0	22	10.7	90	19.5	42	10.0	92	19.8
£16000 - £20000	24	11.2	-	-	34	16.6	93	20.2	58	13.8	93	20.0
£21000 - £30000	39	18.2	-	-	44	21.5	90	19.5	83	19.8	90	19.4
Over £30000	119	55.6	1	25.0	63	30.7	75	16.3	182	43.4	76	16.3
Total	214	100	4	100	205	100	461	100	419	100	465	100
	N 218 p=0.04184< 0.05				N 666 p=0.00024< 0.05				N 884 p=0.00000< 0.05			

Nations, when income groups by place of visit analysed individually, also indicate significant differences, p= 0.04184 for British and p= 0.00000 for German visitors. However, the lack of British visitors in Antalya for some reasons and its negative effects to the analysis should be considered when significance level for Antalya is evaluated (*See Nationality section*). As Table 4.18 indicates, German visitors visiting Istanbul are richer than German visitors who visit Antalya. Here, a question mark may arise. Can the number of rich businesspersons be high in Istanbul and small in Antalya? When The Table 4.15 is evaluated, it is seen that this hypothesis cannot be true for German visitors since German businesspersons are, unlike British businesspersons, in the lower ranks of the income categories and thus, they cannot influence the richness of German visitors to Istanbul. Therefore, it can be concluded that German visitors to Istanbul are richer (69% above average income) than German visitors to Antalya (56%).

Table 4.19 Income status and nationality by survey place

	Istanbul				Antalya				Total			
	British		German		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
Under £5000	2	0.9	20	9.8	-	-	45	9.8	2	0.92	65	9.8
£5000 - £10000	10	4.7	22	10.7	1	25.0	68	14.8	11	5.0	90	13.6
£11000 - £15000	20	9.3	22	10.7	2	50.0	90	19.5	22	10.1	112	16.8
£16000 - £20000	24	11.2	34	16.6	-	-	93	20.2	24	11.0	127	19.1
£21000 - £30000	39	18.2	44	21.5	-	-	90	19.5	39	17.9	134	20.1
Over £30000	119	55.6	63	30.7	1	25.0	75	16.3	120	55.1	138	20.8
Total	214	100	205	100	4	100	461	100	218	100	666	100
	N 419 p=0.00000< 0.05				N 465 p=0.50628 >0.05				N 884 p=0.00000< 0.05			

Although it is similar, Table 4.18, 4.19 compares income levels of the nations in each place of visit and therefore shows different side of the nationality-income-place of visit comparison. Family income levels of British and German respondents differs from each other significantly in Istanbul (p= 0.00000). In comparison with the 85% of British visitors, only 55% of German visitors in Istanbul have above average family income. Unfortunately, it is not possible to make the same and realistic comparison in Antalya, as the number of British respondents is very small.

Family status

No statistically significant differences were identified between German and British visitors in terms of their family status. All British, German and total column percentages indicate very similar values (Table 4.20).Married visitors form the major family status group in the survey. More than half of the visitors (55%) stated that they were married. Singles (21%) and couples (15%) occupy the second and third ranks respectively. When couples and marrieds are combined in one group (couples) and singles, divorced/separated, widowed and single parents (singles) in another group, the share of couples increases to 70% in all visitors. Therefore, married and couples can be said that the most important family status market segment for Turkey in Britain and Germany.

Table 4.20 Family status by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Single	51	22.1	177	21.0	228	21.3
Couple	25	10.8	138	16.4	163	15.2
Married	136	58.9	457	54.3	593	55.3
Div./Separated	12	5.2	40	4.8	52	4.9
Widowed	7	3.0	23	2.7	30	2.8
Single Parent	-	-	7	0.8	7	0.7
Total	231	100	842	100	1073	100
	N 1073 p= 0.25723 >0.05					

No significant differences were confirmed between the family status and the time of visit (first and second shoulders) of each nation (Table 4.21). While more British singles and couples prefer second shoulder season (December), married, divorced/separated and widowed British visitors prefer first shoulder (March/April). Particularly, as largest deviations between each shoulder, while 10% more singles preferring second shoulder, 11% married British visitors prefer visiting Turkey in the first shoulder. On the other hand, in contrast to British visitors, apart from married German visitors who prefer second shoulder season, the other family status groups, namely singles, couples, divorced/separated, widowed and single parents prefer visiting Turkey in the first shoulder.

Table 4.21 Family status and shoulder season by nationality

	1st shoulder				2nd shoulder				Total			
	British		German		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
Single	18	16.7	33	26.8	102	22.3	75	19.5	120	21.2	108	21.3
Couple	10	9.3	15	12.2	77	16.8	61	15.9	87	15.4	76	15.0
Married	70	64.8	66	53.7	239	52.2	218	56.8	309	54.6	284	56.0
Div./ Separated	6	5.6	6	4.9	22	4.8	18	4.7	28	4.9	24	4.7
Widowed	4	3.7	3	2.4	14	3.1	9	2.3	18	3.2	12	2.4
Single Parent	-	-	-	-	4	0.9	3	0.8	4	0.7	3	0.6
Total	108	100	123	100	458	100	384	100	566	100	507	100
	N 231 p=0.31746 >0.05				N 842 p=0.83782 >0.05				N 1073 p=0.97463 >0.05			

Comparisons of family status groups by nation, shoulder season, place of visit (survey place) indicate different results. Although it is not possible and logical to examine family status of British visitors by place of visit due to lack of British visitors in Antalya, analysis of family status of German visitors by place of visit shows significant differences in terms of number of German visitors in both location and share of especially singles and couples in total. It is very interesting to see that the proportion of German married, divorced/separated and widowed groups are almost identical in Istanbul and Antalya (Table 4.22). While singles in Istanbul are 10% more than singles in Antalya, couples in Istanbul are 9% less than couples in Antalya. Thus, it seems that singles are attracted to Istanbul because of active life and the variety of attractions and things to do, while couples probably prefer Antalya to have a rest and spend their time in a much quieter and peaceful place by the sea.

Table 4.22 Family status and survey place by nationality

	Istanbul				Antalya				Total			
	British		German		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
Single	49	21.6	2	50.0	68	28.0	109	18.2	117	24.9	111	18.4
Couple	25	11.0	-	-	25	10.3	113	18.9	50	10.6	113	18.7
Married	135	59.5	1	25.0	132	54.3	325	54.3	267	56.8	326	54.1
Div./ Separated	12	5.3	-	-	11	4.5	29	4.8	23	4.9	29	4.8
Widowed	6	2.6	1	25.0	7	2.9	16	2.7	13	2.8	17	2.8
Single Parent	-	-	-	-	-	-	7	1.2	-	-	7	1.2
Total	227	100	4	100	243	100	599	100	470	100	603	100
	N 231 p=0.05257 >0.05				N 842 p=0.00234< 0.05				N 1073 p=0.00043< 0.05			

Table 4.23 does not indicate significant differences between the first and second shoulder visitors in Antalya and Total visitors in both survey places. However, there are differences among visitors to Istanbul in both shoulders (p= 0.02988 < 0.05). While the numbers of single (30-21=9%), couple (12-9=3%) and divorced/separated (5-4=1%) visitors in Istanbul show increase in the second shoulder, married (62-51=10.1) and widowed (4.0-1=3%) visitors indicate decreasing trend in the second shoulder. In other words, while most singles, couples and divorced/separated visitors prefer visiting Istanbul in the second shoulder, married and widowed visitors prefer first shoulder.

Table 4.23 Family status and shoulder season by place of visit

	Istanbul				Antalya				Total			
	1st shoulder		2nd shoulder		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
Single	51	20.5	66	29.9	69	21.8	42	14.7	120	21.2	108	21.3
Couple	23	9.2	27	12.2	64	20.2	49	17.1	87	15.4	76	15.0
Married	154	61.8	113	51.1	155	48.9	171	59.8	309	54.6	284	56.0
Div./ Separated	11	4.4	12	5.4	17	5.4	12	4.2	28	4.9	24	4.7
Widowed	10	4.0	3	1.4	8	2.5	9	3.1	18	3.2	12	2.4
Single Parent	-	-	-	-	4	1.3	3	1.0	4	0.7	3	0.6
Total	249	100	221	100	317	100	286	100	566	100	507	100
	N 470 p=0.02988< 0.05				N 603 p=0.11573 >0.05				N 1073 p=0.97463 >0.05			

In contrast to Istanbul, while most singles, couples and divorced/separated visitors prefer visiting Antalya in the first shoulder (April), married and widowed visitors prefer second shoulder. 7% in singles, 3% in couples, 1% in divorced/separated visitors decrease is seen in Antalya in the second shoulder. On the other hand, married visitors and widowed visitors indicated superiority in the second shoulder, 11% and 1% respectively, compared to the first shoulder.

When survey places crosstabulated by shoulders, it is interesting to see that visitors' family status in Antalya indicate quite significant differences from Istanbul in both shoulders (Table 4.24).

Table 4.24 Family status and place of visit by shoulder season

	1st shoulder				2nd shoulder				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Single	51	20.5	69	21.8	66	29.9	42	14.7	117	24.9	111	18.4
Couple	23	9.2	64	20.2	27	12.2	49	17.1	50	10.6	113	18.7
Married	154	61.8	155	48.9	113	51.1	171	59.8	267	56.8	326	54.1
Div./ Separated	11	4.4	17	5.4	12	5.4	12	4.2	23	4.9	29	4.8
Widowed	10	4.0	8	2.5	3	1.4	9	3.1	13	2.8	17	2.8
Single Parent	-	-	4	1.3	-	-	3	1.0	-	-	7	1.2
Total	249	100	317	100	221	100	286	100	470	100	603	100
	N 566 p=0.00146< 0.05				N 507 p=0.00063< 0.05				N 1073 p=0.00043< 0.05			

While proportion of singles in the first shoulder is similar in both locations (≅21%), it indicates nearly (15/30=50%) difference in the second shoulder (30% in Istanbul and 15% in Antalya). In other words, while preference of visitors between locations in the first shoulder is almost equal, 66 out of 108 single visitors (66% of all singles in second shoulder) prefer visiting Istanbul in the second shoulder. Majority of couples prefer Antalya in both shoulder seasons. Married and widowed visitors choose Istanbul in the first shoulder and Antalya in the second shoulder as a place of visit. While divorced/separated visitors preferring Antalya in the first shoulder, their preferred place of visit is Istanbul in the second shoulder. All single parents prefer Antalya in both shoulders.

Completely different shoulder season preferences of family status groups in Antalya and in Istanbul explain the differences in the profile, characteristics and motivation between the tourist markets of Istanbul and Antalya. In this respect, family status groups could be crosstabulated with purpose of visit, and influential factors on the date of travel *(See sections related to visitors' travel motivation and purpose of visit).* These crosstabulations did not indicate significant changes in the visit purposes of British family status groups to Istanbul and German visitors to Istanbul and Antalya in the first and second shoulders. British and German visitors' main purposes of visit were observed as Holiday/Vacation and Business in both shoulders in Istanbul and Holiday/Vacation in Antalya. Cultural purpose of visit was confirmed as the most important secondary purpose of visit for British and German visitors.

Having children home

No significant differences were identified between German and British visitors in terms of whether they have any children living home with them (p=0.79819 > 0.05). As seen on Table 4.25 all British, German and total column percentages indicate very similar values. In average, 42% of all visitors do have children home living with them. Visitors who do not have any children home form the major group in the survey. More than half of the visitors (57%) stated that they had no children home. Therefore, visitors with no children home can be said that the most important market segment for Turkey in Britain and Germany. However, 42% visitors with children living home cannot and should not be underestimated. Moreover, 42% visitors with children home disprove the statements that childless families are the most important market segment in off-season. In other words, visitors with children home are as important segment as visitors with no children.

Table 4.25 Having children home by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Yes	73	41.24	266	43.04	339	42.64
No	104	58.76	352	56.96	456	57.36
Total	177	100	618	100	795	100
	N 795 p= 0.79819 >0.05					

No significant differences were confirmed between the family status and the nationality of visitors with children living home (p= 0.30678), and between the family status and nationality of visitors with no children living home (p=0.05980). Majority (86%) of visitors with children living home were formed by married visitors. The remaining 15% were couple, divorced/separated, widowed and single parent visitors (Table 4.26). On the other hand, majority of visitors with no children home were also formed by married visitors (57%) and by couples (31%).

The share of British families with children (couples, 6% and marrieds, 92% = 98%) in total was about 9% more than German families. In contrast, the share of German divorced/separated, widowed and single parent visitors in total (12%) was bigger compared to British visitors (3%). It can be concluded that married visitors primary and couple visitors are the secondary important segments with children in British market, and married visitors primary and divorced/separated, widowed and single parent visitors are the secondary important segments in the German market. In both markets, the largest market segment with children was still married visitors.

In terms of visitors with no children living home, British and German visitors' family status indicate some differences. Married and couple visitors with no children were in majority among both nationalities. While 64% of British visitors with no children were married, lesser, 55%, German visitors were married. In contrast, while 34% of German couples did not have children, 20% of British couples did not have any children living home together. To sum up, married visitors

are the first, couples second and divorced/separated, widowed and single parents are the third market segments to be targeted in British and German visitors markets with no children. In general, it can be concluded that, married and couple visitors are significantly important family status segments (Table 4.26).

Table 4.26 Having children home and family status by nationality

	Yes				No				Total			
	British		German		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
Couple	4	5.5	11	4.2	21	20.2	120	34.1	25	14.1	131	21.2
Married	67	91.8	224	84.2	66	63.5	192	54.5	133	75.1	416	67.3
Div./ Separated	2	2.7	15	5.7	10	9.6	22	6.3	12	6.8	37	6.0
Widowed	-	-	9	3.4	7	6.7	13	3.7	7	4.0	22	3.6
Single Parent	-	-	7	2.7	-	-	5	1.4	-	-	12	1.9
Total	73	100	265	100	104	100	352	100	177	100	618	100
	N 339 p=0.30678 >0.05				N 456 p=0.05980 >0.05				N 795 p=NA			

It might also be important for marketer of destinations to find out about the differences between visitors who have children home and who have no children home. The results are the same (Table 4.26) except for statistical significance levels "p values". Comparison of British visitors with children and with no children (p=0.00027) and crosstabulation of German visitors with and with no children by family status groups (p=0.00000)" which indicated very significant differences. It means that, the tools used by marketers to promote Turkey among visitor markets with and with no children should be somewhat different from each other as they indicate significant differences in terms of their family status (Table 4.27).

Table 4.27 Having children home and family status by nation

	British				German				Total			
	Yes		No		Yes		No		Yes		No	
	N	%	N	%	N	%	N	%	N	%	N	%
Couple	4	5.5	21	20.2	11	4.2	120	34.1	15	4.4	141	30.9
Married	67	91.8	66	63.5	224	84.5	192	54.5	291	85.8	258	56.6
Div./ Separated	2	2.7	10	9.6	15	5.7	22	6.3	17	5.0	32	7.0
Widowed	-	-	7	6.7	9	3.4	13	3.7	9	2.7	20	4.4
Single Parent	-	-	-	-	7	2.7	5	1.4	7	2.1	5	1.1
Total	73	100	104	100	266	100	352	100	339	100	456	100
	N 177 p=0.00027< 0.05				N 618 p=0.00000< 0.05				N 795 p=0.00000< 0.05			

No significant differences were identified between first and second shoulder visitors in terms of whether they have any children living home with them (p=0.64526 > 0.05). As seen on (Table 4.28)_all first shoulder, second shoulder and total column percentages indicate almost identical percentages, which explain that the proportion of visitors with children and with no children living home does not indicate any changes. In average, 43% of all visitors in both shoulders do have children home living with them. More than half of the visitors (57%) stated that they had no children home. Therefore, once more visitors with no children home can be said that the most

important market segment for Turkey in both shoulders and in both tourist markets and the remaining 43%, visitors with children living home should not be underestimated.

Table 4.28 Having children home by shoulder season

	1st shoulder		2nd shoulder		Total	
	N	%	*N*	%	*N*	%
Yes	181	42.7	158	42.6	339	42.6
No	243	57.3	213	57.4	456	57.4
Total	424	100	371	100	795	100
	N 795 p= 0.64526 >0.05					

Table 4.29 explains the relationship between shoulder season and having children home or not by nationality and found no significant differences and relationships. In contrast to a 9% decrease in the share of British visitors with children home, about 3% increase was observed in the share of German visitors with children home in the second shoulder. Eventually 9% increase in British and 3% decrease in German visitors with no children home in the second shoulder. In other words, British and German visitors with or with no children prefer different shoulders to travel to Turkey which reveals the necessity of usage of different marketing techniques in different shoulders and for different segments. While British families with children preferring first shoulder more, British visitors with no children prefer the second shoulder. On the other hand, German visitors' choice with children is the second shoulder unlike visitors with no children who prefer the first shoulder.

Table 4.29 Having children home and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Yes	41	45.6	32	36.8	140	41.9	126	44.4	181	42.7	158	42.6
No	49	54.4	55	63.2	194	58.1	158	55.6	243	57.3	213	57.4
Total	90	100	87	100	334	100	284	100	424	100	371	100
	N 177 p=0.23584 >0.05				N 618 p=0.52660 >0.05				N 795 p=0.64526 >0.05			

No significant differences were confirmed between shoulder season and the family status of visitors with children living home (p= 0.94593), and between shoulder season and the family status of visitors with no children living home (p=0.73295). Majority of visitors with and with no children home were formed by married visitors (Table 4.30).

The share of first and second shoulder visitors with children in total was about almost identical, only minor ignorable changes was observed. It was identified that married visitors primary and divorced/separated and couple visitors are the secondary important segments with children in both shoulders.

Table 4.30 Having children home and family status by shoulder season

	Yes				No				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Couple	8	4.4	7	4.4	N	%	N	%	83	19.6	73	19.7
Married	156	86.1	135	85.4	75	30.9	66	31.0	289	68.2	260	70.1
Div./ Separated	8	4.4	9	5.7	133	54.7	125	58.7	27	6.4	22	5.9
Widowed	5	2.8	4	2.5	19	7.8	13	6.1	17	4.0	12	3.2
Single Parent	4	2.3	3	1.9	12	4.9	8	3.8	8	1.8	4	1.1
Total	181	100	158	100	4	1.6	1	0.5	424	100	371	100
	N 339 p=0.94593 >0.05				N 456 p=0.73295 >0.05				N 795 p=NA			

In terms of visitors with no children living home, the first and second shoulder visitors' family status indicate some differences. Married and couple visitors with no children were in majority between both shoulder visitors. It is very interesting to observe that while the share of married visitors significantly decreased from around 85% for visitors with children to 56% for visitors with no children, the share of couples with no children increased about 26% compared to visitors with children home. 59% of second shoulder visitors with no children and lesser, 55%, first shoulder visitors were married. Couples' and other family status groups share with no children remained almost same with a few exceptions in both shoulders. To sum up, married visitors are the first, couples second and divorced/separated, widowed and single parents are the third market segments to be targeted in off-season (first and second shoulder) visitor markets with no children (Table 4.30).

Table 4.31 confirms the significant differences between visitors who have children home and who have no children home identified on (Table 4.30). The results are the same as Table 4.30 except for statistical significance levels "p values". Comparison of first shoulder visitors with children and with no children (p=0.00000) and crosstabulation of second shoulder visitors with and with no children by family status groups (p=0.00000) which indicated very significant differences. In other words, family status of visitors with or with no children indicates significant differences in both shoulders. Therefore, different marketing techniques and promotion tools should be used for visitor markets with and with no children (Table 4.31).

Table 4.31 Having children home and shoulder season by family status

	1st shoulder				2nd shoulder				Total			
	Yes		No		Yes		No		Yes		No	
	N	%	N	%	N	%	N	%	N	%	N	%
Couple	8	4.4	75	30.9	7	4.4	66	31.0	15	4.4	141	30.9
Married	156	86.2	133	54.7	135	85.4	125	58.7	291	85.8	258	56.6
Div./ Separated	8	4.4	19	7.8	9	5.7	13	6.1	17	5.0	32	7.0
Widowed	5	2.8	12	4.9	4	2.5	8	3.8	9	2.7	20	4.4
Single Parent	4	2.3	4	1.6	3	1.9	1	0.5	7	2.1	5	1.1
Total	181	100	243	100	158	100	213	100	339	100	456	100
	N 424 p=0.00000< 0.05				N 371 p=0.00000< 0.05				N 795 p=0.00000< 0.05			

Table 4.32 Do you have any children living home with you? and shoulder season by family status and by nationality

	British						German						Total					
	1st shoulder			2nd shoulder			1st shoulder			2nd shoulder			1st shoulder			2nd shoulder		
	Yes	No	Tot.	Yes	No	Tot.	Yes	No	Tot.	Yes	No	Tot.	Yes	No	Tot.	Yes	No	Tot.
Couple	4.9	16.3	11.1	6.3	23.6	17.2	4.3	34.5	21.9	4.0	33.5	20.4	4.4	30.9	19.6	4.4	31.0	19.7
Married	90.2	67.3	77.8	93.8	60.0	72.4	85.6	51.5	65.6	83.3	58.2	69.4	86.2	54.7	68.2	85.4	58.7	70.1
Div./ Separated	4.9	8.2	6.7	-	10.9	6.9	4.3	7.7	6.3	7.1	4.4	5.6	4.4	7.8	6.4	5.7	6.1	5.9
Widowed	-	8.2	4.4	-	5.5	3.4	3.6	4.1	3.9	3.2	3.2	3.2	2.8	4.9	4.0	2.5	3.8	3.2
Single Parent	-	-	-	-	-	-	2.9	2.0	2.4	2.4	0.6	1.5	2.3	1.6	1.8	1.9	0.5	1.4
N	41	49	90	32	55	87	139	194	334	126	158	284	181	243	424	158	213	371
	p=0.04930			p=0.00750			p=0.00000			p=0.00000			p=0.00000			p=0.00000		

No significant differences were observed in the share of visitors with children home and visitors with no children home between shoulders and between destinations. Most visitors with children home were married and couple visitors. The shares of divorced, separated, widowed and single parent visitors were rather low (Table 4.32, 4.33). The share of married and couple British visitors with children home increased in the second shoulder while German visitors indicated decrease.

No significant differences were identified between visitors to Istanbul and Antalya, either, (p=0.09576 > 0.05). As seen on Table 4.33, the proportion of visitors with children and with no children living home indicates changes between Istanbul and Antalya. While majority of visitors with children home preferred Istanbul as their destination (47%), most visitors with no children living home chose Antalya (60%). When visitors to Istanbul and Antalya analysed within these two provinces, it was seen that majority of visitors to both provinces were visitors with no children living home. 47% of visitors to Istanbul did have and 53% did not have children home. In Antalya, while the share of visitors with children lesser, 40%, compared to visitors to Istanbul, the share of visitors with no children about 7% more, (60%). Therefore, visitors with no children home can be said that the most important market segment for both provinces, in particular for Antalya.

Table 4.33 Having children home by survey place

	Istanbul		Antalya		Total	
	N	%	*N*	%	*N*	%
Yes	158	46.6	181	39.7	339	42.6
No	181	53.4	275	60.3	456	57.4
Total	339	100	456	100	795	100
	N 795 p= 0.09576 >0.05					

Although it was not possible to analyse British visitors due to lack of British visitors to Antalya, analysis of German visitors with and with no children home in Istanbul and Antalya indicated significant differences (p= 0.02286). While 52% of German visitors to Istanbul had children home, 60% of German visitors to Antalya reported that they had no children living home. It reveals that German visitors with or with no children prefer different destinations with a slight difference in Istanbul (4%) but with a significant difference in Antalya (20%) (Table 4.34). Intensive existence

of German visitors and absence of British visitors in Antalya gives another clue in choosing the right tools in marketing in the future.

Table 4.34 Do you have any children living home with you? and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Yes	73	41.7	-	-	85	51.8	181	39.9	158	46.6	181	39.7
No	102	58.3	2	100	79	48.2	273	60.1	181	53.4	275	60.3
Total	175	100	2	100	164	100	454	100	339	100	456	100
	N 177 p=0.23342 >0.05				N 618 p=0.02286< 0.05				N 795 p=0.09576 >0.05			

No significant differences were confirmed between survey place and the family status of visitors with children living home (p= 0.08835), and visitors with no children living home (p=0.27663). Majority of visitors with and with no children home were formed by married visitors although the percentages for married visitors with no children are lower. It was identified that married visitors primary and divorced/separated, widowed and single parent visitors are the secondary important segments with children in both provinces. On the other hand, married visitors with no children primary, couples are the secondary segments in both provinces.

Table 4.35 confirms the significant differences between visitors who have children home and who have no children home by province stated before. Comparison of visitors in Istanbul with children and with no children (p=0.00000) and crosstabulation of visitors in Antalya with and with no children by family status groups (p=0.00000) indicated very significant differences. In other words, family status of visitors with or with no children indicates significant differences in Istanbul as well as Antalya. Therefore, once more, it becomes very clear that different marketing techniques and promotion tools should be used for visitor markets with and with no children.

Table 4.35 Family status and children living home by place of visit

	Istanbul				Antalya				Total			
	Yes		No		Yes		No		Yes		No	
	N	%	N	%	N	%	N	%	N	%	N	%
Couple	4	2.5	46	25.4	11	6.1	95	34.5	15	4.4	141	30.9
Married	143	90.5	110	60.8	148	81.8	148	53.8	291	85.8	258	56.6
Div./ Separated	7	4.4	16	8.8	10	5.5	16	5.8	17	5.0	32	7.0
Widowed	4	2.5	8	4.4	5	2.8	12	4.4	9	2.7	20	4.4
Single Parent	-	-	1	0.6	7	3.9	4	1.5	7	2.1	5	1.1
Total	158	100	181	100	181	100	275	100	339	100	456	100
	N 339 p=0.00000< 0.05				N 456 p=0.00000< 0.05				N 795 p=0.00000< 0.05			

Table 4.36 Do you have any children living home with you? and shoulder season by family status and by nationality

	British						*German*						*Total*					
	Istanbul			Antalya			Istanbul			Antalya			Istanbul			Antalya		
	Yes	No	Tot.	Yes	No	Tot.	Yes	No	Tot.	Yes	No	Tot.	Yes	No	Tot.	Yes	No	Tot.
Single	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Couple	5.5	20.6	14.3	-	-	-	-	31.6	15.2	6.1	34.8	23.3	2.5	25.4	14.7	6.1	34.5	23.2
Married	91.8	63.7	75.4	-	50.0	50.0	89.4	57.0	73.8	82.3	53.8	65.0	90.5	60.8	74.6	81.8	53.8	64.9
Div./ Separated	2.7	9.8	6.9	-	-	-	5.9	7.6	6.7	5.6	5.9	5.7	4.4	8.8	6.8	5.5	5.8	5.7
Widowed	-	5.9	3.4	-	50.0	50.0	4.7	2.5	3.7	2.8	4.0	3.5	2.5	4.4	3.5	2.8	4.4	3.7
Single Parent	-	-	-	-	-	-	-	1.3	0.6	3.9	1.5	2.4	-	0.6	0.3	3.9	1.5	3.3
N	73	102	175	-	2	2	85	79	164	181	273	454	158	181	339	181	275	456
	p=0.00033			p=NA			p=0.00000			p=0.00000			p=0.00000			p=0.00000		

Number of children home

No significant differences were identified between German and British visitors in terms of number of children living home with them. The Table 4.37 indicates that 79% of German visitors did have one child, while this was 8% lower for British visitors (71%). In contrast, it was seen that British visitors had the majority (29%) among visitors who had two or more children living home compared to German visitors (21%). When the number of children increases, the number of visitors in that group decreases. It can be said that having small number of children, in general, makes travelling easy and encourages visitors to travel.

Table 4.37 No of children home by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
One	52	71.2	209	78.9	261	77.2
Two	18	24.7	53	20.0	71	21.0
Three	3	4.1	2	0.8	5	1.5
Four	-	-	1	0.4	1	0.3
Total	73	100	265	100	338	100
	N 338 p= 0.12976 >0.05					

No significant differences were confirmed between shoulder season and the number of visitors' children living home. Majority of British and German visitors were formed by visitors with one child. The number of total first and second shoulder visitors' children also did not indicate significant differences, and the share of visitors in all groups was almost same in both shoulders with small changes. However, the number of British and German visitors' children indicated changes between shoulders. While the share of British visitors with one child increased by 12% in the second shoulder, shares of visitors with two and more children decreased. In contrast, while the share of German visitors with one child decreased by 8% in the second shoulder, shares of visitors with two and more children increased.

Table 4.38 No of children home and nationality by shoulder

	1st shoulder				2nd shoulder				Total			
	British		German		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
One	27	65.9	115	82.7	25	78.1	94	74.6	52	71.2	209	78.9
Two	12	29.3	24	17.3	6	18.8	29	23.0	18	24.7	53	20.0
Three	2.01	4.9	-	-	1	3.1	2	1.6	3	4.1	2	0.8
Four	-	-	-	-	-	-	1	0.8	-	-	1	0.4
Total	41	100	139	100	32	100	126	100	73	100	265	100
	N 180 p=0.00608< 0.05				N 158 p=0.84386 >0.05				N 338 p=0.12976 >0.05			

The crosstabulation of number of children and nationality by shoulder indicated different difference levels in the first and second shoulder. While a very significant difference was recorded in the first shoulder (p= 0.00608), the second shoulder German and British visitors did not reflect significant differences in terms of the number of children they have home (p= 0.84386) (Table 4.38). In other words, British and German visitors differ from each other in the first shoulder according to number of their children. It can be said that, while British visitors with one child prefer second shoulder more, German visitors prefer first shoulder, and, vice versa, British visitors with two or more children prefer first shoulder compared to German visitors who prefer second shoulder. It was identified that visitors with one child primary and visitors with two or more children are the secondary important segments in both shoulders. Identification of differences in demographics by nationality can be of a great help in successful marketing and promotion activities.

The analysis of visitors by nationality was not possible in Antalya due to lack of British visitors in Antalya. As well as total visitors (British + German), the comparison of German visitors in Antalya and Istanbul by number of children did not show considerable differences. Visitors with one child primary and visitors with two or more children were identified as secondary markets for both provinces and nationalities. On the other hand, the comparison of number of children and nationality in Istanbul did not indicate large differences either (p= 0.19562).

Table 4.39 Visitors with children by number of children

	Count	Response %	Cases %
1 children at home aged 12 or less	80	18.9	23.6
1 children at home aged 13-16	63	14.9	18.6
1 children at home aged 17-20	62	14.7	18.3
1 children at home aged 21+	85	20.1	25.1
Visitors with only one child Sub-Total	*290*	*68.6*	*85.5*
2 children at home aged 12 or less	41	9.7	12.1
2 children at home aged 13-16	24	5.7	7.1
2 children at home aged 17-20	21	5.0	6.2
2 children at home aged 21+	31	7.3	9.1
Visitors with two children Sub-Total	*117*	*27.7*	*34.5*
3 children at home aged 12 or less	9	2.1	2.7
3 children at home aged 21+	6	1.4	1.8
Visitors with three children Sub-Total	*15*	*3.5*	*4.4*
4 children at home aged 12 or less	1	0.2	0.3
Visitors with four children Sub-Total	*1*	*0.2*	*0.3*
Total Responses	423	100	124.8
	Response n 423 Case N 339		

In addition, analysis of number of all British and German visitors' children by number and by age groups in all shoulders indicated that when number of children increases number of visitor in off-season decreases. In other words, most off-season visitors (69%) have only one child. It was worth noting that the share of visitors with children aged 12 or less and 21+ among visitors with one and two children groups were notably high. It can be said more than half of all visitors (56%) with one or two children and in the age groups of 12 or less and 21+ (Table 4.39). (*See also* Table 4.74, 4.75, 4.76, *for details.)*

Table 4.40 Number of visitors' children, their age groups by shoulder season

	British						German						Total					
	1st SH.		2nd SH.		Total		1st SH.		2nd SH.		Total		1st SH.		2nd SH.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
1 child 12orless	8	14.0	9	22.5	17	17.5	34	20.7	29	17.9	63	19.3	42	19.0	38	18.8	80	18.9
1 child 13-16	10	17.5	7	17.5	17	17.5	27	16.5	19	11.7	46	14.1	37	16.7	26	12.9	63	14.9
1 child 17-21	5	8.8	6	15.0	11	11.3	16	9.8	35	21.6	51	15.6	21	9.5	41	20.3	62	14.7
1 child over 21	10	17.5	5	12.5	15	15.5	42	25.6	28	17.3	70	21.5	52	23.5	33	16.3	85	20.1
Sub-Total	33	57.9	27	67.5	60	61.9	119	72.6	111	68.5	230	70.6	152	68.8	138	68.3	290	68.6
2 child 12orless	6	10.5	9	22.5	15	15.5	15	9.1	11	6.8	26	8.0	21	9.5	20	9.9	41	9.7
2 child 13-16	8	14.0	1	2.5	9	9.3	9	5.5	6	3.7	15	4.6	17	7.7	7	3.5	24	5.7
2 child 17-21	4	7.0	-	-	4	4.1	7	4.3	10	6.2	17	5.2	11	5.0	10	5.0	21	5.0
2 child over 21	4	7.0	1	2.5	5	5.2	10	6.1	16	9.9	26	8.0	14	6.3	17	8.4	31	7.3
Sub-Total	22	38.6	11	27.5	33	34.0	41	25.0	43	26.5	84	25.8	63	28.5	54	26.7	117	27.7
3 child 12orless	1	1.8	2	5.0	3	3.1	2	1.2	4	2.5	6	1.8	3	1.4	6	3.0	9	2.1
3 child over 21	-	-	-	-	-	-	2	1.2	4	2.5	6	1.8	2	0.9	4	2.0	6	1.4
Sub-Total	1	1.8	2	5.0	3	3.1	4	2.4	8	4.9	12	3.7	5	2.3	10	5.0	15	3.5
4 child 12orless	1	1.8	-	-	1	1.0	-	-	-	-	-	-	1	0.5	-	-	1	0.2
Sub-Total	1	1.8	-	-	1	1.0	-	-	-	-	-	-	1	0.5	-	-	1	0.2
Total	57	100	40	100	97	100	164	100	162	100	326	100	221	100	202	100	423	100
	N 97 p=NA						N 326 p=NA						N 423 p=NA					

Table 4.41 Number of visitors' children, their age groups by survey place

	British						German						Total					
	Istanbul		Antalya		Total		Istanbul		Antalya		Total		Istanbul		Antalya		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
1 child 12orless	17	17.5	-	-	17	17.5	19	18.6	44	19.6	63	19.3	36	18.1	44	19.6	80	18.9
1 child 13-16	17	17.5	-	-	17	17.5	15	14.7	31	13.8	46	14.1	32	16.1	31	13.8	63	14.9
1 child 17-21	11	11.3	-	-	11	11.3	12	11.8	39	17.4	51	15.6	23	11.6	39	17.4	62	14.7
1 child over 21	15	15.5	-	-	15	15.5	22	21.6	48	21.4	70	21.5	37	18.6	48	21.4	85	20.1
Sub-Total	60	61.9	-	-	60	61.9	68	66.7	162	72.3	230	70.6	128	64.3	162	72.3	290	68.6
2 child 12orless	15	15.5	-	-	15	15.5	17	16.7	9	4.0	26	8.0	32	16.1	9	4.0	41	9.7
2 child 13-16	9	9.3	-	-	9	9.3	6	5.9	9	4.0	15	4.6	15	7.5	9	4.0	24	5.7
2 child 17-21	4	4.1	-	-	4	4.1	2	2.0	15	6.7	17	5.2	6	3.0	15	6.7	21	5.0
2 child over 21	5	5.2	-	-	5	5.2	4	3.9	22	9.8	26	8.0	9	4.5	22	9.8	31	7.3
Sub-Total	33	34.0	-	-	33	34.0	29	28.4	55	24.6	84	25.8	62	31.2	55	24.6	117	27.7
3 child 12orless	3	3.1	-	-	3	3.1	3	2.9	3	1.3	6	1.8	6	3.0	3	1.3	9	2.1
3 child over 21	-	-	-	-	0	0.0	2	2.0	4	1.8	6	1.8	2	1.0	4	1.8	6	1.4
Sub-Total	3	3.1	-	-	3	3.1	5	4.9	7	3.1	12	3.7	8	4.0	7	3.1	15	3.5
4 child 12orless	1	1.0	-	-	1	1.0	-	-	-	-	0	0.0	1	0.5	-	-	1	0.2
Sub-Total	1	1.0	-	-	1	1.0	-	-	-	-	-	-	1	0.5	-	-	1	0.2
Total	97	100	-	-	97	100	102	100	224	100	326	100	199	100	224	100	423	100
	N 97 p=NA						N 326 p=NA						N 423 p=NA					

Conclusions

Demographic differences and similarities were identified as follows and summarised in following text and figures (Figures 4.1 - 4.6).

- Minor differences exist between overall visitors (British + German) in the first shoulder and second shoulder as Figure 4.1 indicates. Except for few, British and German visitors demographic profile indicates resemblance.
- Significant differences exist between British visitors in the first shoulder and in the second shoulder. (Figure 4.2)
- Although it is not significant, some differences exist between German visitors in the first shoulder and in the second shoulder (Figure 4.3)
- Significant differences exist between British visitors in all shoulders (off-season) and German visitors in all shoulders
- Significant differences exist between British visitors in the first shoulder and German visitors in the first shoulder
- Significant differences exist between British visitors in the second shoulder and German visitors in the second shoulder

- Significant differences exist between overall visitors (British + German) to Istanbul and to Antalya (Figure 4.4)
- Significant differences exist between British visitors to Istanbul and to Antalya (it was incomparable because of lack of British visitors to Antalya) (Figure 4.5)
- Significant differences exist between German visitors to Istanbul and to Antalya (Figure 4.6)
- Significant differences exist between British visitors in all destinations and German visitors in all destinations
- Significant differences exist between British visitors to Istanbul and German visitors to Istanbul
- Significant differences exist between British visitors to Antalya and German visitors to Antalya (it was incomparable because of lack of British visitors to Antalya)

In other words, significant differences exist in nationality, shoulder and survey place respects and different demographic profiles require different and effective marketing and promotion policies and strategies to attract visitors for each segment.

The summary of off-season markets' demographic profile by shoulder season

Overall off-season, first shoulder and second shoulder visitor characteristics:

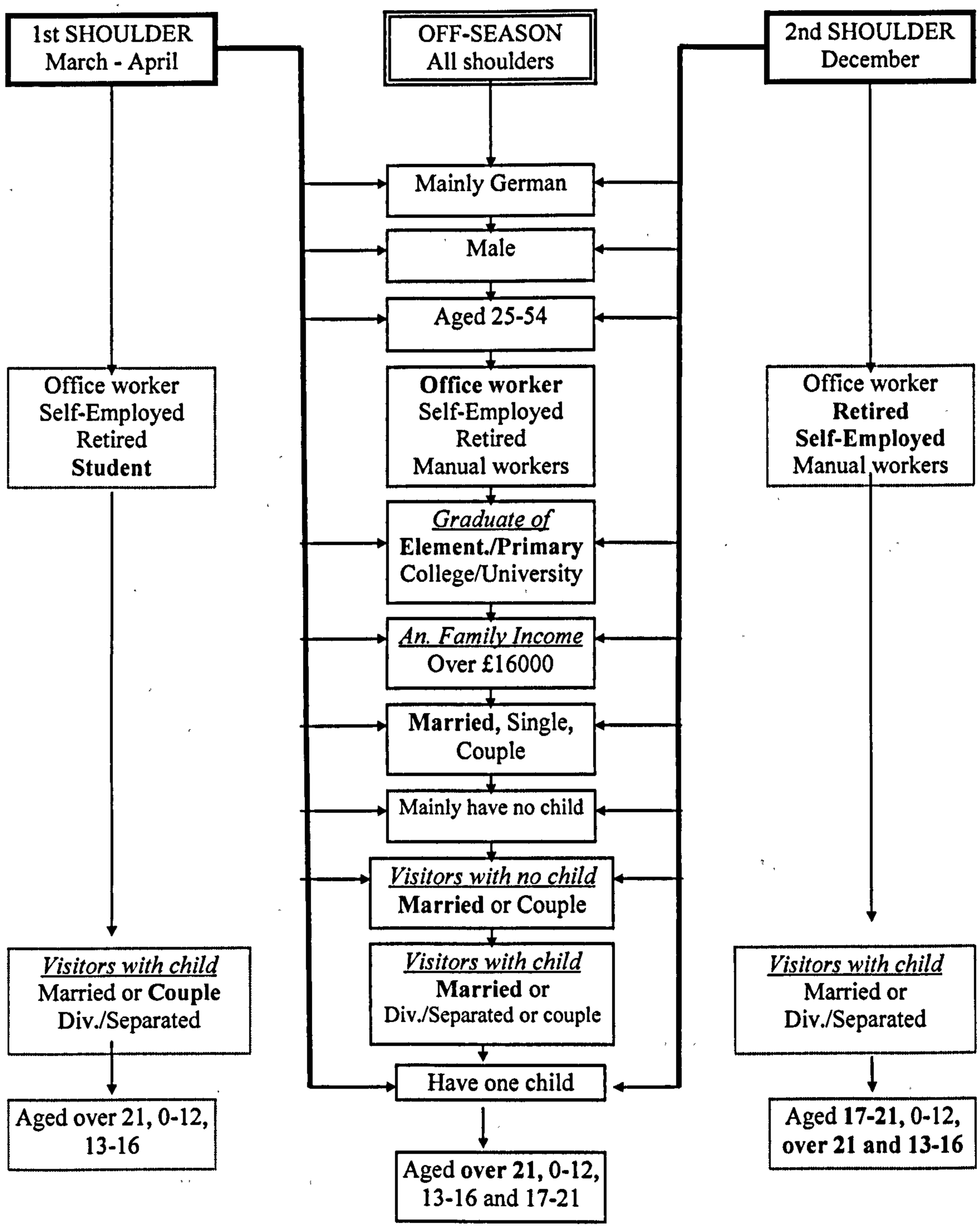
Overall off-season visitors of Turkey were mainly German national, male (56%) and aged between 25-34 (27%) and 45-54 (23%). However, the share of male visitors was lesser in the first shoulder (55%) compared to overall off-season visitors and second shoulder overall visitors (58%). More first shoulder visitors (32%) had received college or university education than second shoulder (29%) and overall off-season visitors. It was important to observe that the share of visitors who had received primary school education was lesser in the first shoulder and higher in the second shoulder. In other words, first shoulder visitors were higher educated. In average, while 40% of visitors had received primary school education, 30% were graduate of college or university.

Almost one in two overall off-season, first and second shoulder visitors were office workers and 23% of them were self-employed and retirees. A slight increase was observed in the share of retired visitors in the second shoulder, while self-employed visitors' share decreased compared to first shoulder visitors. Overall off-season and both shoulder visitors' annual family income was rather high and majority declared their income as more than £16000 per year. While nearly half of off-season visitors' annual family income (49%) was over £20000, 17% of off-season visitors had £16000-£20000 annual family income. However, the share of visitors whose annual income was over £20000 was higher in the first shoulder (51%) compared to second shoulder visitors (47%).

Overall off-season and both shoulder visitors were formed by overwhelmingly by married visitors (around 55%), but the share of singles (21%) and couples (15%) cannot be underestimated. Majority of visitors do not have any children living home. In average 85% of visitors with children living home were married visitors in both shoulders. On the other hand, most of visitors with no children living home were formed also by married visitors and couples. However, the share of married visitors with no children living home in the second shoulder (59%) slightly more than first shoulder visitors (55%). In general, off-season visitors usually have one (around 77%) or two children (21%) living home with them and aged over 21 and between 0-12. The age group of visitors' children indicated small difference between shoulders. While visitors with only one child aged over 21 and between 0-12 were respectively in majority in the first shoulder, age group of child went down in the second shoulder and visitors with one child aged between 17-21 and 0-12 hold the majority in all visitors with children (Figure 4.1). (*See also Appendix 97, 98, 99*)

Figure 4.1 Demographic profile of overall visitors by shoulder (*See also Appendix 97, 98, 99*)

OFF-SEASON **OVERALL** MARKET (BRITISH + GERMAN) **BY SHOULDER**



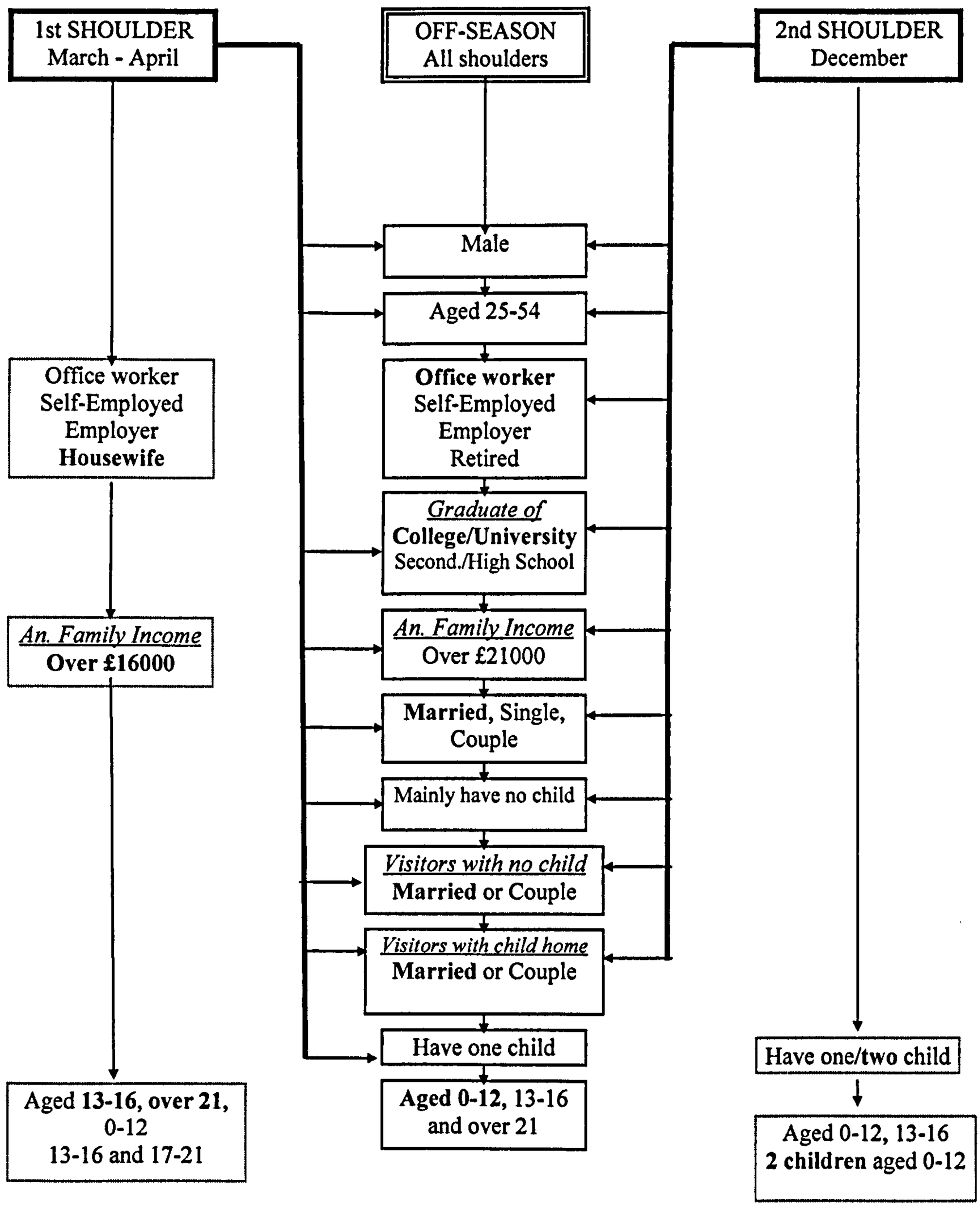
Off-season, first shoulder and second shoulder British visitor characteristics:

Overall off-season and both shoulder British visitors of Turkey were mainly male (around 57%) and aged between 45-54 (31 %) and 25-34 (30%). Although the shares of these age groups were closer, visitors aged between 45-54 in the first shoulder (30%) and visitors aged between 25-34 (34%) in the second shoulder were in majority. In other words, second shoulder British visitors were much younger than first shoulder visitors. Unlike overall off-season visitors, British visitors were highly educated. Around 73% of overall off-season, first shoulder and second shoulder British visitors had received college, university or postgraduate education. It was important to observe that the share of visitors who had received postgraduate education was higher in the second shoulder. No British visitors declared that they had received primary school education (Figure 4.2).

Majority of overall off-season, first and second shoulder British visitors were office workers (38%), self-employed (18%), employers (13%) and retirees (8%). While an important increase was observed in the share of retired visitors in the second shoulder, office workers' share decreased compared to first shoulder British visitors. Overall off-season and both shoulder visitors' annual family income was significantly high and majority stated their income as more than £30000 per year. In particular, the share of British visitors who had more than £30000 annual family income was quite high in the first shoulder (63%) in comparison with second shoulder visitors income (48%). When one consider the visitors whose annual family income was between £20000-£30000 (around 18%), high level of British visitors' income become more clear.

Overall off-season British visitors were formed by mainly by married visitors (59%). However, while 65% of British visitors were married in the first shoulder, their share went down to 54% in the second shoulder and share of singles and couples indicated significant increases. Majority of visitors did not have any children living home. Particularly second shoulder visitors did not have children (63%) compared to first shoulder visitors (54%). In average 92% of overall off-season visitors with children living home were married visitors and their share was higher by about 4% in the second shoulder than in the first shoulder. On the other hand, most of visitors with no children living home were formed also by married visitors and couples. However, the share of married visitors with no children living home in the first shoulder (67%) more than second shoulder visitors (60%). In general, overall off-season British visitors usually have one (around 71%) or two children (25%) living home with them and aged between 0-12 and 13-16. The number of children and age group of visitors' children indicated small difference between shoulders. While 18.8% of visitors in the second shoulder had two children living home, it was 29% in the first shoulder. In other words, it seems that first shoulder was more suitable to travel for British visitors who had two or more children. In addition, while visitors with only one child aged between 13-16 and over 21 were respectively in majority in the first shoulder, age group of child went down and number of children increased in the second shoulder and visitors with one child and two children aged between 0-12 held the majority in all visitors with children.

Figure 4.2 Demographic profile of British visitors by shoulder (*See also Appendix 97, 98, 99*)



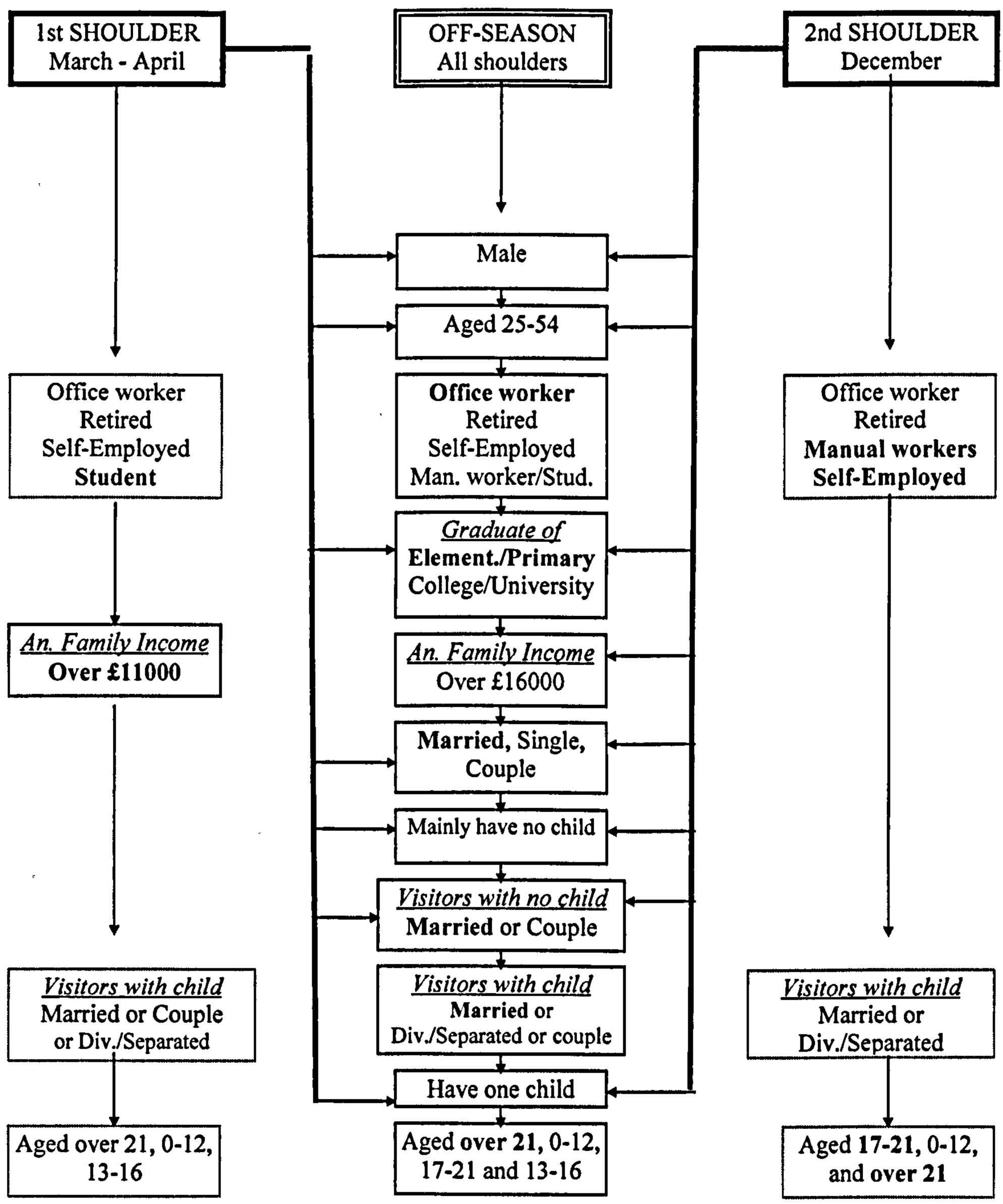
Off-season, first shoulder and second shoulder German visitor characteristics:

Majority of German visitors were male (around 56%) and aged between 25-34 (26%) and 35-54 (38%). In other words, most overall off-season, first and second shoulder German visitors were aged between 25 and 54. Unlike British visitors, German visitors' education level was rather low. 52% of overall off-season, 38% of first shoulder and 58% of second shoulder German visitors were graduate of only elementary/primary school. The share of primary school graduates were at its peak in the second shoulder with 58%. College or university graduates remained only around 24% in both shoulders (Figure 4.3). (*See also Appendix 97, 98, 99*)

Majority of overall off-season, first and second shoulder German visitors were office workers (51%), retirees (12%) and self-employed (10%) and the proportion of German office workers were significantly higher compared to British visitors. On the other hand, share of German office workers higher in the second shoulder (54%). Retired visitors occupied second place in both shoulders (12%) and students fourth place in the first shoulder (10%), while students disappeared and manual workers settled in third place in the second shoulder (10%). Compared to British visitors, German visitors' annual family income was significantly lower and their income was over £11000 per year. The shares of top income groups were quite close to each other and each was around 20% in both shoulders. The annual family income of second shoulder visitors which was over £16000 were higher compared to first shoulder visitors whose income were over £11000.

Overall off-season German visitors were usually married visitors (54%). Majority of visitors did not have any children living home (around 57%). In average 85% of overall off-season visitors with children living home were married visitors in both shoulders. On the other hand, most of visitors with no children living home were formed also by married visitors and couples. However, unlike British visitors, the share of married German visitors with no children living home in the second shoulder (58%) more than first shoulder visitors (52%). In general, overall off-season German visitors usually have one (around 79%) or two children (20%) living home with them and aged over 21 and between 0-12. The number of children and age group of visitors' children indicated small difference between shoulders. While 17% of visitors in the first shoulder had two children living home, it was 23% in the second shoulder. In other words, unlike British visitors, it seems that second shoulder was more suitable to travel for German visitors who had two or more children. In addition, while visitors with only one child aged over 21 were respectively in majority in the first shoulder, age group of child went down in the second shoulder and visitors with one child aged between 17-21 held the majority in all visitors with children (Figure4.3). (*See Appendix 97, 98, 99*)

Figure 4.3 Demographic profile of German visitors by shoulder (*See also Appendix 97, 98, 99*)



The summary of off-season markets' demographic profile by survey place

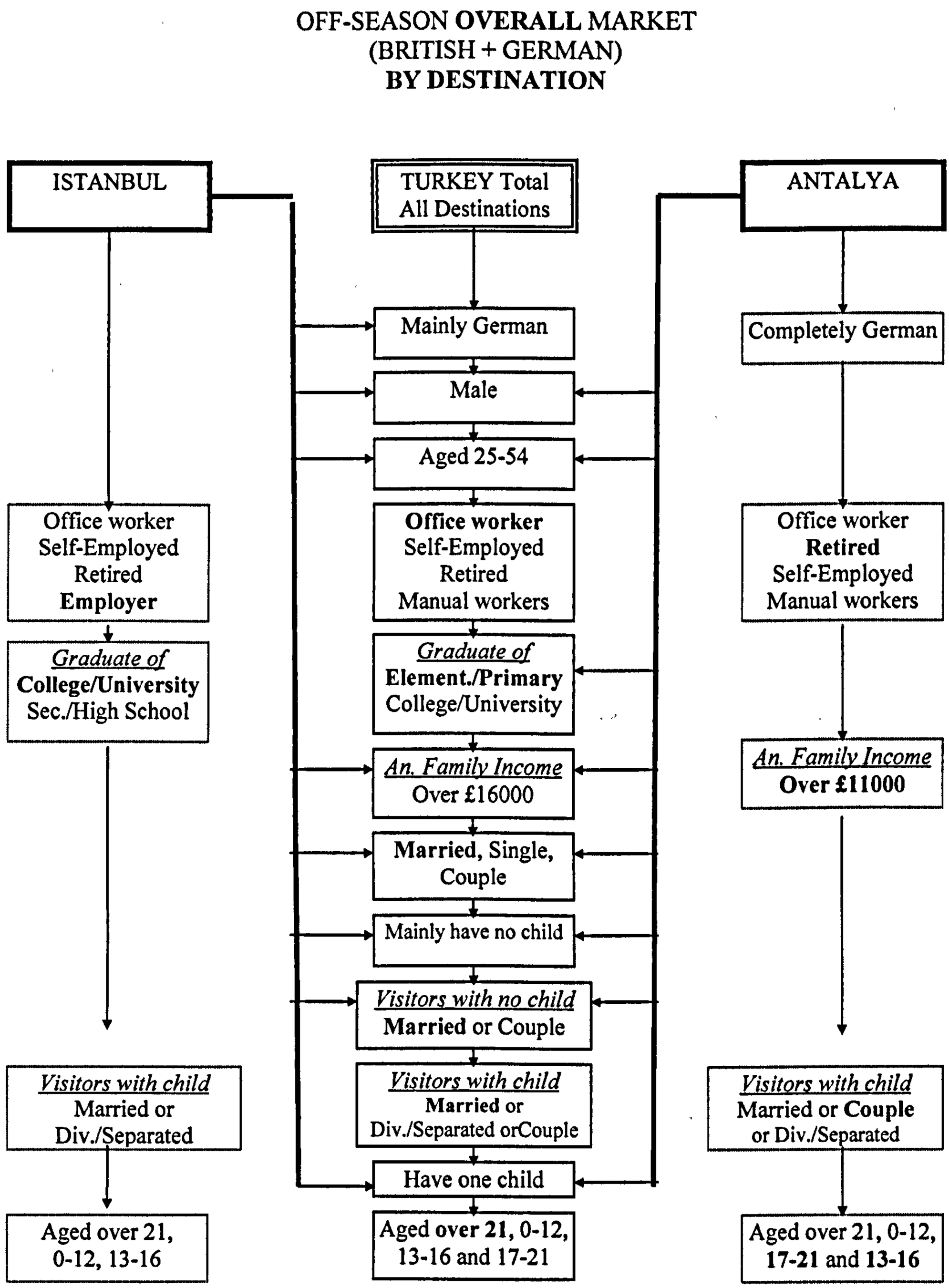
Visitor characteristics to overall Turkey, Istanbul and Antalya

Overall off-season visitors of Turkey were mainly German national, male (56%) and aged between 25-34 (27%) and 45-54 (23%). However, the share of male visitors was lesser in the second shoulder (54%) compared to overall off-season visitors and first shoulder overall visitors (60%). It was interesting to see that while significant majority of visitors to Antalya were graduate of primary school (57%), 46% of visitors to Istanbul were college or university graduates. However, primary school graduates held the majority with 41% among total visitors and college/university graduates followed them with 31%. In other words, visitors to Istanbul were higher educated.

Almost one in two overall off-season visitors to Turkey, Istanbul and Antalya were office workers and 23% of them were self-employed and retirees. Retired visitors and manual workers shares were higher in Antalya, while self-employed and employer visitors' share higher in Istanbul. Overall off-season visitors' annual family income was rather high and majority declared their income as more than £16000 per year. However, income level of visitors indicated significant differences in Istanbul and Antalya. While 63% of visitors to Istanbul had over £20000 annual family income, 40% of visitors to Antalya stated that they had annual family income between £11000 and £20000. In other words, visitors' income level to Istanbul significantly higher than visitors' income level to Antalya.

Overall off-season and both destination visitors were formed by overwhelmingly by married visitors (around 55%), but the share of singles particularly in Istanbul (25%) and couples especially in Antalya (19%) cannot be underestimated. Majority of visitors, particularly visitors to Antalya did not have any children living home. 85% of overall off-season visitors with children living home were married. However, married visitors' share with children was higher in Istanbul (91%) than in Antalya (82%). On the other hand, most of visitors with no children living home were formed also by married visitors and couples. However, the share of married visitors to Istanbul with no children living home (61%) was more than share of visitors to Antalya (54%). In general, off-season visitors, visitors to Istanbul and Antalya usually had one (around 77%) or two children (21%) living home with them and aged over 21 and between 0-12.

Figure 4.4 Demographic profile of overall visitors by survey place (*See also Appendix 97, 98, 99*)



British visitor characteristics to overall Turkey, Istanbul and Antalya:

Identification of demographic profile of British visitors to Antalya was not possible because of lack of British visitors to Antalya and therefore, overall off-season visitors by shoulder also represent the profile of British visitors to Istanbul. As overall off-season British visitors profile analysed in the above sections, it will not be repeat in this section. (For detailed analysis *see section 3.4.2.10.1.2 above*).

Overall British market to Turkey and Istanbul:

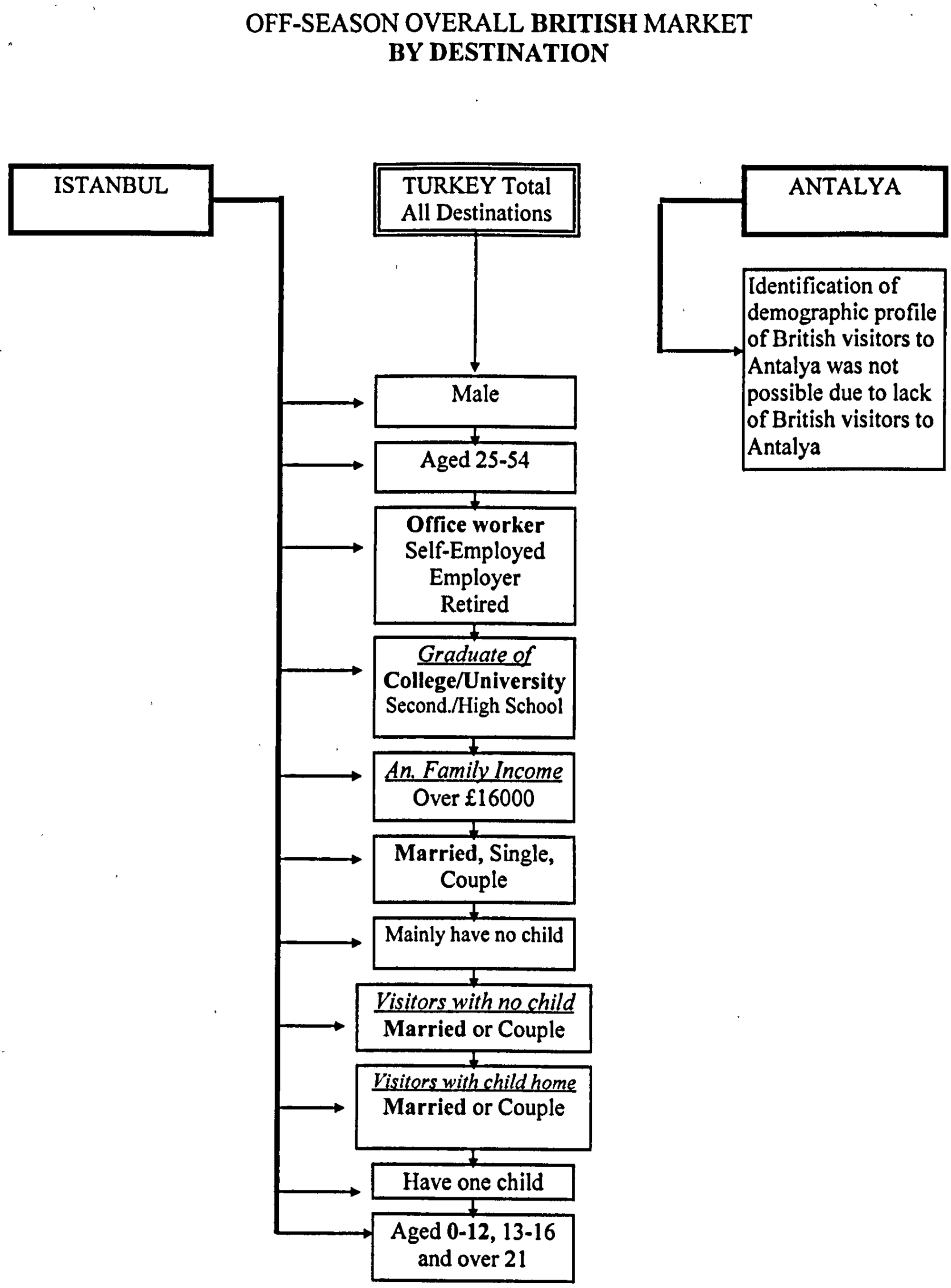
The proportion of British male visitors was (57%) in Istanbul. Majority of overall British visitors were aged between 45-54 (32%) and 25-34 (30%). German visitors' education level to Istanbul was significantly higher compared to German visitors to Istanbul. While 55% of British visitors to Istanbul were college or university graduates and only 37% of German visitors were college or university graduates. In other words, German visitors to Istanbul were well educated than German visitors to Istanbul (Figure 4.5). (*See also Appendix 97, 98, 99*)

Majority of overall off-season British visitors to Istanbul were office workers. Self-employed and employers followed them. A large difference was observed in the share of British and German visitors whose annual family income was over £300000 between Istanbul and Antalya. While 56% of British visitors stated that their annual family income was over £300000, it was 31% for German visitors to Istanbul and even lesser, only 16% in Antalya.

60% of overall British visitors to Istanbul were married visitors. However, singles and couples in Istanbul were secondary important segments. Majority of visitors, particularly visitors to Istanbul (58%) did not have any children living home. On the other hand, in average 64% of visitors with no children living home were formed by married visitors and 21% by couples. Generally, British visitors to Istanbul usually had one child (around 71%) living home with them and aged 0-12 and 13-16.

Because of lack of British visitors to Antalya in both shoulders, only negligible four British visitors were interviewed and therefore they were not included in this analysis. As a consequence, identification of profile of off-season British market to Antalya was not possible.

Figure 4.5 Demographic profile of British visitors by destination (*See also Appendix 97, 98, 99*)



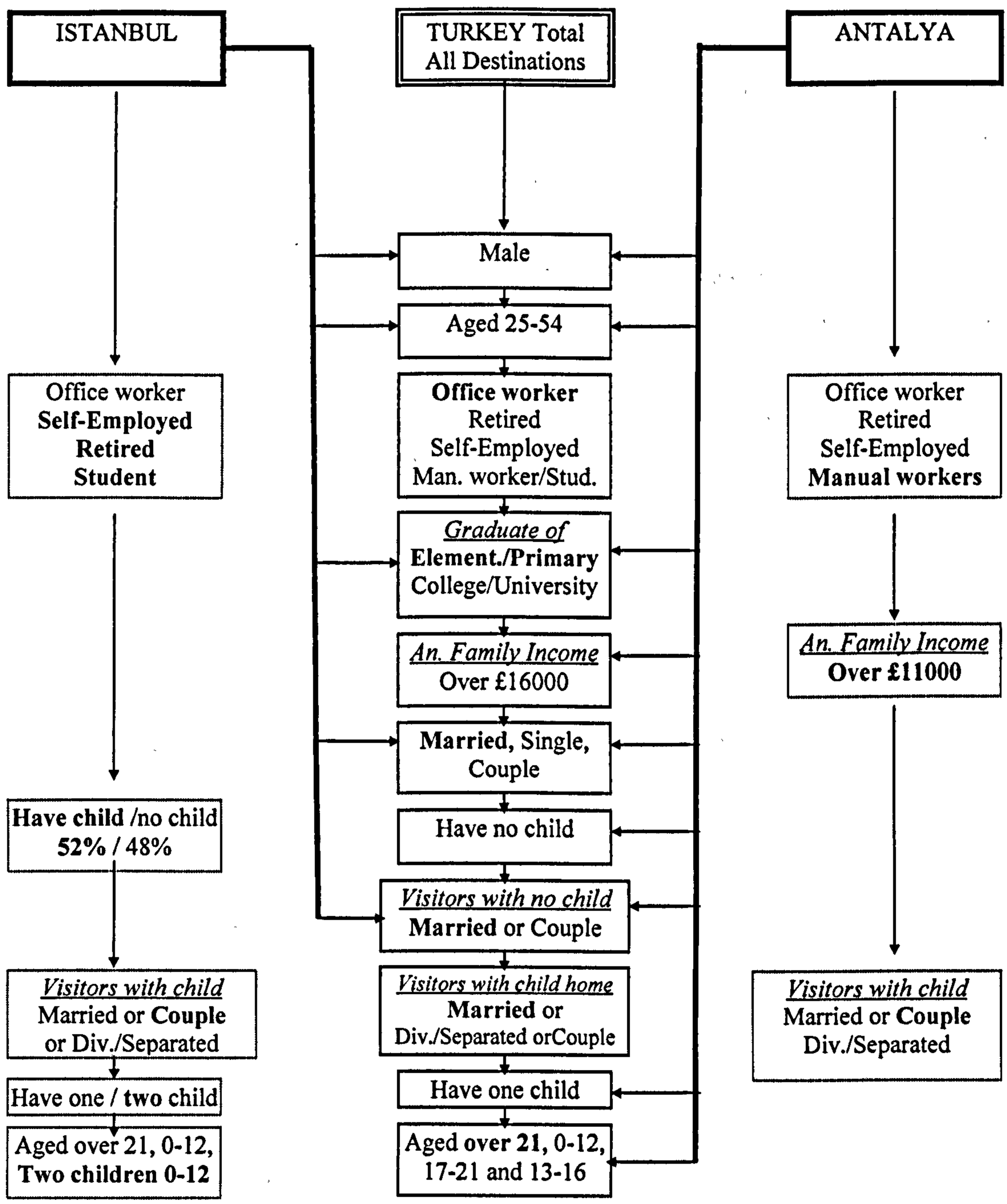
German visitor characteristics to overall Turkey, Istanbul and Antalya:

The proportion of German male visitors (63%) was higher in Istanbul than Antalya (54%). Majority of overall German visitors were aged between 25-34 (26%) and 35-54 (38%). However, the share of middle-aged visitors aged between 35 and 54 was higher in Istanbul (44%) than in Antalya (37%). German visitors' education level to Antalya was significantly lower compared to German visitors to Istanbul. While 58% of German visitors to Antalya were primary school graduates and only 19% were college or university graduates, the share of primary school graduates went down to 38% and college or university graduates raised up to 37% in Istanbul. In other words, German visitors to Istanbul were well educated than visitors to Antalya (Figure 4.6). (*See also Appendix 97, 98, 99*)

Majority of overall off-season German visitors to Turkey (51%), Istanbul (57%) and Antalya (49%) were office workers. Although the share of office workers and students were lesser in Antalya compared to Istanbul, the share of retired visitors and manual visitors were higher. German visitors' income level was rather low in Antalya. A large difference was observed in the share of visitors whose annual family income was over £300000 between Istanbul and Antalya. 31% German family income in Istanbul was only 16% in Antalya. While the proportion of visitors whose income over £16000 was 69% in Istanbul, it was 56% in Antalya. In other words, the shares of lower income groups were higher in Antalya.

Around 54% of overall German visitors to Istanbul and Antalya were married visitors. However, singles in Istanbul (28%) and couples in Antalya (19%) second important segments. Majority of visitors, particularly visitors to Istanbul (89%) did not have any children living home. On the other hand, in average 55% of visitors with no children living home were formed by married visitors and 34% by couples. Generally, German visitors to Istanbul and Antalya usually had one child (around 78%) living home with them and aged over 21 and between 0-12.

Figure 4.6 Demographic profile of overall visitors by destination (*See also Appendix 97, 98, 99*)



The following table (Table 4.42) summarize the rest of the results obtained from Chi Square analysis. As seen on the table, significant differences exist between British and German visitors. Except for few variables, all indicated values very close to zero showing the importance level of differences. British visitors did not show great differences between shoulder, which means they indicate almost the same behaviour, except for some variables, in both shoulders. German visitors, on the other hand, demonstrated rather important differences between shoulders indicating that German visitors visiting Turkey in the first and second shoulder are quite different and it is important to know this for better marketing and promotion of off- and shoulder seasons. Overall visitors, British and German, exhibited almost the same pattern as German visitors as the numerical superiority of German visitors in overall survey sample.

In terms of characteristics of German and overall visitors in Istanbul and Antalya, significant differences exist. As in shoulder seasons, German visitors exhibits significant differences in Istanbul and Antalya. This explains that German visitors prefer and behave in both destinations in a different way. As the number of British respondents in Antalya the comparison of British visitors in Istanbul and Antalya was not liable although it is computed. The detailed analysis will be displayed in the following sections and tables.

Table 4.42 The significance levels for variables

	British / German	British 1st/2nd Shoulder	German 1st/2nd Shoulder	Overall 1st/2nd Shoulder	British Istanbul/ Antalya	German Istanbul/ Antalya	Overall Istanbul/ Antalya
Purpose of visit (prim. & secondary)	**0.000**	0.327	0.791	0.472	0.676	**0.000**	**0.000**
Attraction factors	**0.000**	0.069	**0.000**	**0.000**	**0.000**	**0.000**	**0.000**
Influential factors on date of travel	**0.000**	**0.044**	**0.000**	**0.000**	0.051	**0.000**	**0.000**
Information sources used	**0.000**	0.281	**0.000**	**0.001**	0.070	**0.000**	**0.000**
Month of preference if free	**0.000**	0.176	**0.001**	**0.000**	0.995	**0.000**	**0.000**
Seasonal preference if free	**0.035**	**0.041**	**0.000**	**0.000**	0.983	**0.000**	**0.000**
Reason for seasonal preference if free	0.156	0.579	0.227	0.313	NA	0.059	**0.032**
Preferred region if free	**0.000**	0.678	**0.021**	0.224	0.312	**0.000**	**0.000**
Future intentions to visit Turkey	**0.000**	0.475	0.056	**0.025**	0.915	0.651	**0.031**
Organisation of travel	**0.000**	0.129	0.084	0.917	0.742	**0.000**	**0.000**
Travel to Turkey (By tour/individual)	**0.000**	0.955	**0.006**	0.202	0.385	**0.000**	**0.000**
Package-Tour expenditures	**0.000**	0.223	**0.000**	**0.000**	0.106	**0.000**	**0.000**
Travel booking time	0.060	**0.016**	**0.000**	**0.000**	0.460	0.650	0.278
Respondents' companions	NA	0.369	0.087	**0.048**	0.794	**0.000**	**0.000**
Number of respondents' companions	NA	0.626	0.926	0.896	0.999	**0.030**	0.527
Current travel as 2nd or first holiday	0.173	**0.003**	**0.000**	**0.000**	0.363	0.709	0.647
Length of stay in Turkey	**0.000**	0.063	**0.000**	**0.000**	**0.001**	**0.000**	**0.000**
Number of provinces visited	0.135	0.424	**0.000**	**0.000**	0.018	0.398	0.386
Region of visit	**0.000**	0.133	**0.027**	0.587	**0.000**	**0.000**	**0.000**
Accommodation choice	**0.000**	0.921	0.068	0.469	**0.011**	0.837	**0.000**
Participated activities	**0.000**	0.175	**0.000**	**0.000**	0.855	**0.000**	**0.000**
Amount of expenditures in Turkey	**0.000**	0.837	**0.008**	**0.019**	NA	NA	NA
Visited Turkey before?	0.427	0176	0.866	0.594	0.923	**0.002**	**0.003**
Length of last stay	**0.001**	**0.000**	0.359	**0.000**	NA	NA	NA
Last visit's purpose of visit	**0.000**	NA	NA	0.359	NA	NA	**0.000**
Influential factors on last visit	**0.000**	NA	NA	0.617	NA	NA	**0.000**

4.2. Motivational characteristics of visitors

Purpose of visit

The analysis of main purpose of visit by nationality, shoulder season and survey place indicated significant differences (p=0.000). The main purposes of overall visitors were ranked as holiday/vacation (59%), cultural (24%), business (11%), friend and relative visits (3%) and finally shopping (2%) respectively. The share of visitors with other purposes in total was rather low. In other words most visitors (83%) visited Turkey for holiday/vacation and cultural purposes (Table 4.43). While first and most important primary purpose of visit is holiday (79%), cultural purpose of visit was stated as first and most important secondary purpose of visit (73%). In other words, visitors participate in cultural activities, such as sightseeing and visits to cultural ancient sites and museums while holidaying in Turkey. It can be said that the combination of cultural and natural (sea-sun-sand, nature etc.) attractions and facilities attracts visitors to Turkey.

Table 4.43 Purpose of visit (primary and secondary purpose)

	British		German		Total	
	N	%	*N*	%	*N*	%
Holiday.	149	44.1	721	63.4	870	58.9
Business(+meeting)	82	24.3	74	6.5	156	10.6
Cultural(+religious)	70	20.7	278	24.4	348	23.6
V.F.R.	22	6.5	15	1.3	37	2.5
Shopping	3	0.9	24	2.1	27	1.8
None of above	12	3.6	26	2.3	38	2.6
Total	n 338	100	n 1138	100	n 1476	100
	N 229		N 835		N 1064	
	Case N 1064 Responses n 1476 p= 0.0000 Missing:14					

The general combined purpose of visit indicates large differences between two nations. The largest group was identified as holidaying British and German visitors. However, share of holidaying British visitors in total (44%) was rather less than German visitors' share (63%). This indicates that while most German visitors' purpose was generally holiday/vacation, British visitors did have some other purposes as well as holiday and vacation. The second mostly mentioned purpose of visit was business for British visitors (24%) and cultural for German visitors (24%). The share of German business visitors were quite lower compared to British visitors (7%). British and German cultural visitors share were closer to each other. On the other hand while the share of British friend and relatives visitors higher (7%) compared to German visitors (1%), the share of German shopping visitors was higher (2%) compared to British visitors (1%). It was interesting to observe that most of British visitors' purpose stated in None of Above was related to marriage, engagement or attending to a family wedding.

No significant differences were observed in the distribution of purpose of visit by shoulder (Table 4.44). Except for few small fluctuations, distribution of purpose of British and German visitors were close in both shoulders. While number of holidaying British visitors were decreased by 4%, holidaying German visitors increased by 2% in the second shoulder. In contrast, 2% increase in British cultural visitors and 3% decrease in German cultural visitors in the second shoulder. In other words, British and German tourist markets were more or less the same markets in terms of their purpose of visit in both shoulders.

Table 4.44 Purpose of visit and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Holiday	71	46.1	78	42.4	386	62.4	335	64.5	457	59.1	413	58.7
Business (+ meeting)	38	24.7	44	23.9	42	6.8	32	6.2	80	10.3	76	10.8
Cultural (+ religious)	30	19.5	40	21.7	160	25.8	118	22.7	190	24.6	159	22.5
Visiting Friends & R.	11	7.1	11	6.0	9	1.5	6	1.2	20	2.6	17	2.4
Shopping	-	-	3	1.6	7	1.1	17	3.3	7	0.9	20	2.8
None of above	4	2.6	8	4.3	15	2.4	11	2.1	19	2.5	19	2.7
Total	154	100	184	100	619	100	519	100	773	100	703	100
	N 106		N 123		N 450		N 385		N 556		N 508	
	N 229 p=0.327 n 338				N 835 p=0.791 n 1138				N 1064 p=0.472 n 1476			
	Numbers (N) based on responses N No of cases (visitors) n No of responses											

Table 4.45 Purpose of visit and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Holiday	145	43.4	4	100	146	44.6	575	70.9	291	44.0	579	71.0
Business (+ meeting)	82	24.6	-	-	68	20.8	6	0.7	150	22.7	6	0.7
Cultural (+ religious)	70	21.0	-	-	78	23.9	200	24.7	148	22.4	200	24.5
Visiting Friends & R.	22	6.6	-	-	6	1.8	9	1.1	28	4.2	9	1.1
Shopping	3	0.9	-	-	16	4.9	8	1.0	19	2.9	9	1.0
None of above	12	3.6	-	-	13	4.0	13	1.6	25	3.8	13	1.6
Total	334	100	4	100	327	100	811	100	661	100	815	100
	N 225		N 4		N 241		N 594		N 466		N 598	
	N 229 p=0.676 n 338				N 835 p=0.000 n 1138				N 1064 p=0.000 n 1476			
	Numbers (N) based on responses N No of cases (visitors) n No of responses											

Table 4.45 indicates some significant differences between number of German visitors in Istanbul and Antalya and their purpose of visit. While most holidaying (71%) visitors preferred Antalya, German business (21%), V.F.R. (2%) and shopping (5%) visitors preferred Istanbul for their place of visit. German Cultural visitors share were close to each other in both provinces. It is worth noting that holidaying, business and cultural British and German visitors' shares in total were very close to each other. It means that main and major purposes of British and German visitors were same in Istanbul which were holiday, culture and business. It can be concluded that Antalya was overwhelmingly preferred for holiday/vacation and cultural purposes, business purpose were added to this main purpose of visit list in Istanbul.

The main purpose of visit by gender

The number of male and female British visitors in Istanbul by main purpose of visit in both shoulders indicated significant differences (Table 4.46). The majority of female British visitors' main purpose of visit was holiday/vacation in both shoulders, however, they showed a 4% decrease in the second shoulder. In contrast, there was a 3% increase in the holidaying male British visitors in the second shoulder. The number of total male and female visitors also confirms that there was an increase in the male British visitors in Istanbul (from 56% to 58%) and decrease in the female visitors (from 44% to 42%).

Table 4.46 British gender in Istanbul and main purpose of visit by shoulder season

	British Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Business		V.F.R.		Total		Holiday		Culture		Business		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Male	28	47.5	-	-	30	78.9	1	12.5	59	55.7	35	53.0	-	-	31	79.5	2	28.6	69	58.0
Female	31	52.5	1	100	8	21.1	7	87.5	47	44.3	31	47.0	1	100	8	20.5	5	71.4	50	42.0
Total	59	100	1	100	38	100	8	100	106	100	66	100	1	100	39	100	7	100	119	100
	N 106 p= 0.00063< 0.05										N 119 p= 0.00151< 0.05									

** Columns for other ignorable purposes which had very small numbers are not placed in the table.
*** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya

The second point is that although there was a slight decrease in the second shoulder in the number of male business visitors in total visitors from 51% to 45%, the majority of British visitors to Istanbul with business purpose in both shoulders were male visitors (79%). On the other hand, in both shoulders, the majority visitors with V.F.R. purpose in both shoulders were female visitors.

It is very interesting to see that only one British female visitors to Istanbul in both shoulders and no male visitors indicated that their main purpose of visit was cultural.

Table 4.47 German gender in Istanbul and main purpose of visit by shoulder season

	German Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Male	50	63.3	4	30.8	29	78.4	3	100	89	64.5	34	54.0	5	55.6	20	80.0	1	50.0	62	60.2
Female	29	36.7	9	69.2	8	21.6	-	-	49	35.5	29	46.0	4	44.4	5	20.0	1	50.0	41	39.8
Total	79	100	13	100	37	100	3	100	138	100	63	100	9	100	25	100	2	100	103	100
	N 138 p= 0.01871< 0.05										N 103 p= 0.23249 >0.05									

** Columns for other ignorable purposes which had very small numbers are not placed in the table.

In general, there was an increase in the number of female German visitors to Istanbul ((from 36% to 40%) and decrease in males in the second shoulder (from 65% to 60%), when compared to the first shoulder (Table 4.47). Except for cultural purpose of visit, German males have the superiority in all other main visit purposes in both shoulders in Istanbul. While German males form 63% of

total holidaying visitors in the first shoulder, this came down to 54% in the second shoulder. However, share of German businessmen showed a slight increase in the second shoulder (from 78 to 80%). While the majority of cultural visitors were females (69%) in the first shoulder, males got the superiority with a slight difference in the second shoulder with 56%.

On the other hand, comparison of each males and females in their own group by shoulder indicate that the share of Holidaying and businessmen German males were almost same in both shoulders, but the number of males with cultural purpose doubled in the second shoulder. On the other hand, while the share of holidaying females in all females increase in the second shoulder (from 59% to 71%), share of businesswomen (from 16% to 12%) and females with cultural purposes in all females (from18% to 10%) showed decrease.

Table 4.48 German gender groups in Antalya and main purpose of visit by shoulder season

	German Visitors to Antalya																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Male	151	50.7	7	77.8	1	50.0	-	-	159	51.0	154	57.7	5	62.5	1	50.0	-	-	162	57.4
Female	147	49.3	2	22.2	1	50.0	2	100	153	49.0	113	42.3	3	37.5	1	50.0	1	100	120	42.6
Total	298	100	9	100	2	100	2	100	312	100	267	100	8	100	2	100	1	100	282	100
	N 312 p= 0.22120 >0.05										N 282 p= 0.81319 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

According to Table 4.48 above, almost same proportion of male and female German visitors prefer Antalya for Holiday purposes in both shoulders, 95%. As seen, almost all German visitor's main purpose of visit in Antalya was holiday/vacation. Therefore Chi-Square tests did not indicate any significant differences between males and females by shoulders. There was also one interesting result that was the increase in the number of male visitors to Antalya in the second shoulder. The male visitors increased from 51% in the second shoulder to 57% in the second shoulder.

The main purpose of visit by age groups

The main age groups are in the range of 25-54 ages of which respectively 45-54 and 25-34 age groups are the most important age groups in both shoulders. As Table 4.49 indicates at least 50% of all British age groups' main purpose of visit was holiday/vacation, and majority of business related and holidaying visitors were in the 45-54 and 25-34 age groups in both shoulders in Istanbul. While the share of holidaying 16-24, 25-34, 45-54 and 65+ age groups' in total increased in the second shoulder, 35-44 and 55-64 age groups indicated decrease in their shares. The increases and decreases were reflected to total of each groups, as well.

Business related British visits to Istanbul showed an opposite results of holidaying visitors. Except for 35-44 and 55-64 age groups, other two age groups indicated an increase in the second shoulder and 65+ age group remained unchanged. In other words, visitors in the 35-44 and 55-64 age groups' prefer visiting Istanbul for business purposes in the first shoulder, while British visitors in the 25-34, 45-54 and 65+ age groups prefer taking their holiday in Istanbul in the second shoulder.

Table 4.49 British age groups in Istanbul and main purpose of visit by shoulder season

	British Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
0-15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
16-24	3	5.08	-	-	-	-	1	12.5	4	3.77	4	6.15	-	-	-	-	-	-	5	4.24
25-34	15	25.4	-	-	11	28.9	3	37.5	29	27.4	20	30.8	-	-	15	38.5	3	42.9	39	33.1
35-44	10	16.9	1	100	7	18.4	-	-	18	17	9	13.8	1	100	5	12.8	1	14.3	17	14.4
45-54	18	30.5	-	-	12	31.6	2	25.0	32	30.2	22	33.8	-	-	15	38.5	1	14.3	40	33.9
55-64	11	18.6	-	-	7	18.4	2	25.0	20	18.9	6	9.23	-	-	3	7.69	2	28.6	12	10.2
65+	2	3.39	-	-	1	2.63	-	-	3	2.83	4	6.15	-	-	1	2.56	-	-	5	4.24
Total	59	100	1	100	38	100	8	100	106	100	65	100	1	100	39	100	7	100	118	100
	N 106 p= 0.78127 >0.05										N 118 p= 0.04750< 0.05									

** Columns for other ignorable purposes which had very small numbers are not placed in the table
*** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya

As Table 4.50 indicates, while the share of German visitors aged between 16-44 increased in the second shoulder (from 51% to 74%), 45 and over aged German visitors to Istanbul indicated decrease (from 49% to 26%). Exactly the same situation was seen in the share of holidaying, business and cultural visitors in total in the second shoulder. In other words, German visitors aged 16-44 prefer second shoulder to first shoulder and visitors aged over 45 favour the first shoulder for their visit to Istanbul.

As British visitors, majority of German visitors' main purpose of visit was also holiday/vacation. Business second and cultural visit purpose comes third in Istanbul. Except for 35-44 and 55-64 age groups, more of all other age groups preferred Istanbul for holiday/vacation purposes. A decrease was seen in the share of 35-44 and 55-64 aged visitors with holiday/vacation purpose in total as a result of increase in cultural visits in these groups in the second shoulder. While German cultural visits, in general, increased in the second shoulder, business purpose indicated a decline.

Age group distribution of German visitors in Antalya indicated some differences between shoulders. While 65+ age group remained constant in both shoulders (7%), only 45-54 (from 17% in the first shoulder to 24% in the second shoulder) and 55-64 (from 15% to 17%) age groups indicated increase in the second shoulder in Antalya in parallel to the increase in the holidaying German visitors aged 45-54 (from 16% to 24%) and 55-64 (from 16% to 18%) in the second shoulder (Table 4.51). In short it can be said that 45+ aged German visitors has a tendency towards taking their holiday/vacation in Antalya in the second shoulder in contrast to the other younger age groups who prefer the first shoulder.

Table 4.50 German age groups in Istanbul and main purpose of visit by shoulder season

	German Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
0-15	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
16-24	8	10.1	-	-	2	5.41	-	-	12	8.7	12	19.0	2	22.2	1	4.0	-	-	16	15.5
25-34	14	17.7	5	38.5	10	27.0	2	66.7	31	22.5	20	31.7	1	11.1	11	44.0	1	50	34	33.0
35-44	15	19.0	2	15.4	9	24.3	-	-	28	20.3	12	19.0	4	44.4	9	36.0	-	-	26	25.2
45-54	20	25.3	2	15.4	11	29.7	1	33.3	35	25.4	13	20.6	1	11.1	3	12.0	-	-	17	16.5
55-64	16	20.3	2	15.4	5	13.5	-	-	24	17.4	5	7.94	1	11.1	1	4.0	1	50	9	8.74
65+	6	7.59	2	15.4	-	-	-	-	8	5.8	1	1.59	-	-	-	-	-	-	1	0.97
Total	79	100	13	100	37	100	3	100	138	100	63	100	9	100	25	100	2	100	103	100
	N 138 p= 0.34683 >0.05										N 103 p= 0.30009 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

Table 4.51 German age groups in Antalya and main purpose of visit by shoulder season

	German Visitors to Antalya																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
0-15	7	2.35	-	-	-	-	-	-	7	2.24	1	0.37	-	-	-	-	-	-	1	0.35
16-24	42	14.1	1	11.1	-	-	1	50	45	14.4	30	11.2	2	25	-	-	1	100	33	11.7
25-34	80	26.8	2	22.2	1	50	1	50	84	26.9	67	25.1	1	12.5	2	100	-	-	70	24.8
35-44	52	17.4	1	11.1	1	50	-	-	54	17.3	41	15.4	2	25	-	-	-	-	43	15.2
45-54	48	16.1	4	44.4	-	-	-	-	52	16.7	63	23.6	1	12.5	-	-	-	-	67	23.8
55-64	48	16.1	-	-	-	-	-	-	48	15.4	47	17.6	-	-	-	-	-	-	48	17
65+	21	7.05	1	11.1	-	-	-	-	22	7.05	18	6.74	2	25	-	-	-	-	20	7.09
Total	298	100	9	100	2	100	2	100	312	100	267	100	8	100	2	100	1	100	282	100
	N 312 p= 0.77774 >0.05										N 282 p= 0.24605 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

While all age groups' main purpose of visit to Antalya was overwhelmingly holiday/vacation, only few people declared that culture, business or visiting friends and relatives was their main purpose in both shoulders.

The main purpose of visit by employment status

As Table 4.52 indicates the significant differences exist between employment status and their main purpose of visit in both shoulders. British office workers were the major group in both shoulders in Istanbul. Self-employed and employers followed the office workers. In the mean time, while fourth place was occupied by housewives in the first shoulder, the same place was occupied by retired British visitors in the second shoulder. The same situation was reflected to the number of holidaying British visitors as well. Most of British visitors were placed in the either holiday or business purposes. Few visitors declared that their purpose was visiting their family, friends or relatives in both shoulders. In contrast to the decrease in the share of all purposes in total in the second shoulder, other various purposes which were classified as None of Above and not shown in the table increased about 5%.

Table 4.52 British employment status in Istanbul and main purpose of visit by shoulder season

	British Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Employer	6	10.3	-	-	8	21.6	-	-	14	13.5	9	13.6	-	-	7	-	-	-	16	13.4
Self-Employed	11	19.0	-	-	8	21.6	1	12.5	20	19.2	14	21.2	-	-	6	15.4	2	28.6	22	18.5
Manual worker	-	-	-	-	5	13.5	-	-	5	4.81	4	6.06	-	-	3	7.69	-	-	8	6.72
Office worker	26	44.8	1	100	14	37.8	3	37.5	44	42.3	17	25.8	-	-	20	51.3	2	28.6	41	34.5
Unemployed	2	3.45	-	-	-	-	-	-	2	1.92	2	3.03	-	-	-	-	2	28.6	4	3.36
Student	1	1.72	-	-	-	-	3	37.5	4	3.85	1	1.52	-	-	-	-	-	-	2	1.68
Retired	3	5.17	-	-	-	-	1	12.5	4	3.85	12	18.2	-	-	1	2.56	-	-	13	10.9
Housewife	6	10.3	-	-	1	2.7	-	-	7	6.73	3	4.55	1	100	-	-	1	14.3	7	5.88
NoneAbove	3	5.17	-	-	1	2.7		-	4	3.85	4	6.06	-	-	2	5.13	-	-	6	5.04
Total	58	100	1	100	37	100	8	100	104	100	66	100	1	100	39	100	7	100	119	100
	N 104 p= 0.00250< 0.05										N 119 p= 0.00000< 0.05									

** Columns for other ignorable purposes which had very small numbers are not placed in the table
*** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya

While the share of holidaying British employers (from 10% to 14%), self-employed (from 19% to 21%), manual workers (from 0% to 6%), retireds (from 5% to 18%) and other professionals (from 5% to 6%) in total increased in the second shoulder, others indicated a decrease. In other words, while office workers (45%), unemployed (4%), students (2%) and housewives (10%) preferring the first shoulder to spend their holiday/vacation in first shoulder, others prefer the second shoulder. On the other hand, it seemed that employers (22%), self-employed (22%) and manual workers (14%) prefer first shoulder, office workers (51%) and other professionals (5%) prefer visiting Istanbul in the second shoulder for business purposes.

Table 4.53 German employment status in Istanbul and main purpose of visit by shoulder season

	German Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Employer	1	1.27	1	7.69	3	8.11	-	-	5	3.62	-	-	-	-	-	-	-	-	-	-
Self-Employed	8	10.1	-	-	6	16.2	-	-	14	10.1	7	11.1	-	-	4	16.0	-	-	11	10.7
Manual worker	8	10.1	-	-	-	-	-	-	10	7.25	2	3.17	-	-	3	12.0	1	50.0	6	5.83
Office worker	43	54.4	5	38.5	27	73.0	2	66.7	78	56.5	35	55.6	6	66.7	18	72.0	-	-	61	59.2
Unemployed	-	-	-	-	-	-	-	-	-	-	2	3.17	-	-	-	-	-	-	2	1.94
Student	3	3.8	3	23.1	-	-	1	33.3	7	5.07	10	15.9	2	22.2	-	-	-	-	13	12.6
Retired	11	13.9	1	7.69	-	-	-	-	13	9.42	3	4.76	-	-	-	-	1	50.0	5	4.85
Housewife	4	5.06	3	23.1	1	2.7	-	-	10	7.25	3	4.76	1	11.1	-	-	-	-	4	3.88
NoneAbove	1	1.27	-	-	-	-	-	-	1	0.72	1	1.59	-	-	-	-	-	-	1	0.97
Total	79	100	13	100	37	100	3	100	138	100	63	100	9	100	25	100	2	100	103	100
	N 138 p= 0.00113< 0.05										N 103 p= 0.02165< 0.05									

** Columns for other ignorable purposes which had very small numbers are not placed in the table.

Except for employers whose as expected main purpose was business and students who expectedly prefer visiting and staying with friends and families for financial reasons, majority of all other employment status groups visited Istanbul in the first shoulder for holiday/vacation purposes. On the other hand, except for office workers, all other groups also preferred Istanbul for holiday purposes in the second shoulder.

German visitors also indicate important differences when employment status and main purpose of visit is compared in both shoulders (Table 4.53). Majority of German visitors were placed in the columns of holiday/vacation, business and cultural purposes respectively. However, in contrast to the increase in holidaying German visitors in Istanbul (from 57% to 61%), business (from 27% to 24%) and cultural visits (from 9% to 9%) indicated decrease in the second shoulder. Unlike British visitors in Istanbul whose third major purpose was V.F.R., cultural purpose of visit emerged as third major purpose among German visitors.

The major professional group was the office workers (57% and 59%) for German visitors to Istanbul in both shoulders as it was for British visitors. The other ranks showed differences between shoulders. While second place by Self-employed (10%), third place by retireds (9%) and fourth and fifth places was occupied by jointly manual workers (7%) and housewives (7%) in the first shoulder, these ranks changed to students (13%), self-employed (11%), manual workers (6%) and retired (5%) respectively in the second shoulder. It can be said that German employers, manual workers, retired and housewives prefer visiting Istanbul in the first shoulder while others, office workers, students and unemployed preferring second shoulders. The self-employed did not show significant changes in their share in total.

Except for German employers in the first shoulder and manual workers in the second shoulder, majority of all other employment groups' main purpose of visit was holiday/vacation in Istanbul. While the major employment group's, office workers, main purpose was observed as holiday in both shoulders (55% and 57%) secondary purpose for this group was identified as business (35% and 30%). As seen office workers with holiday/vacation purpose increased and with business purpose decreased in the second shoulder. On the other hand, the numbers indicated that most German retireds prefer first shoulder (85%) and most students prefer second shoulder for holiday/vacation purpose (77%). It is also worth noting that students (43% and 15%) and housewives (30% and 25%) are the major groups in both shoulders who indicated that their second main purpose was culture.

Distribution of employment groups among German visitors in Antalya indicated a complete difference between shoulders as a result of uneven distribution of visitors between purpose of visit columns (p=0.99 in the first and p=0.00 in the second shoulder) (Table 4.54). The table indicates employers (2% in the first and 2% in the second shoulder), self-employed (11% in the first and 9% in the second shoulder), unemployed (2% in the first and 1% in the second shoulder), and students (13% in the first and 2% in the second shoulder), preferred the first shoulder with a big difference compared to their share in the second shoulder. In particular, the share of students in total in the first shoulder was almost six times higher than second shoulder (13% in the first and 2% in the second shoulder). On the other hand manual workers, office workers, retireds and housewives seem to prefer second shoulder. Although, German retireds (2%) and housewives (1%) indicated small increases in the second shoulder in Antalya, manual workers almost doubled (from 6% to 12%)

their share in total in the second shoulder while office workers increased their share about 7% (from 46% to 53). In short, while , employers, self-employed, unemployed and students preferring first shoulder, manual workers, office workers, retireds and housewives preferred second shoulder to visit Antalya.

Table 4.54 German employment status in Antalya and main purpose of visit by shoulder season

	German Visitors to Antalya																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Employer	7	2.36	-	-	-	-	-	-	7	2.26	3	1.13	-	-	-	-	-	-	5	1.78
Self-Employed	34	11.4	-	-	1	50.0	-	-	35	11.3	23	8.65	-	-	2	100	-	-	25	8.9
Manual worker	19	6.4	1	12.5	-	-	-	-	20	6.45	32	12.0	1	12.5	-	-	1	100	34	12.1
Office worker	133	44.8	6	75.0	1	50.0	1	50.0	142	45.8	143	53.8	4	50.0	-	-	-	-	148	52.7
Unemployed	5	1.68	-	-	-	-	-	-	5	1.61	2	0.75	-	-	-	-	-	-	2	0.71
Student	38	12.8	-	-	-	-	1	50.0	39	12.6	5	1.88	1	12.5	-	-	-	-	6	2.14
Retired	37	12.5	1	12.5	-	-	-	-	38	12.3	38	14.3	1	12.5	-	-	-	-	40	14.2
Housewife	17	5.72	-	-	-	-	-	-	17	5.48	18	6.77	1	12.5	-	-	-	-	19	6.76
NoneAbove	7	2.36	-	-	-	-	-	-	7	2.26	2	0.75	-	-	-	-	-	-	2	0.71
Total	297	100	8	100	2	100	2	100	310	100	266	100	8	100	2	100	1	100	281	100
	N 310 p= 0.99907 >0.05										N 281 p= 0.00000< 0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

Apart from few exceptions, almost all German employment groups preferred Antalya for holiday/vacation purposes. Preference of shoulders for holiday/vacation purposes indicated a parallel similarities to the general situation mentioned above as majority of visitors' purpose was holiday/vacation.

While all employment groups' main purpose of visit to Antalya was Holiday/Vacation, only few people declared that culture, business and V.F.R. was their main purpose in both shoulders. In this respect, except for office workers an unemployed, all other groups preferred the first shoulder to visit Antalya for holiday/vacation purposes. Only the share of holidaying office workers in total office workers increased showed an increase in the second shoulder (from 94% to 97%). All unemployed preferred Antalya for only holiday/vacation purposes in both shoulders.
Another interesting result was that the increasing interest among students (from 0% to 17%) and housewives (from 0% to 5%) towards cultural resources in Antalya in the second shoulder.

The main purpose of visit by education

The Table 4.55 indicates that around 74% of all British visitors received college/university and postgraduate education which means that British visitors to Istanbul was highly educated. While the share of secondary/high school (from 26% to 24) and college/university graduates (from 58% to 52%) decreased in the second shoulder, Primary school graduates' (1%) and postgraduates' share (from 16% to 22%) increased.

Table 4.55 British Education level in Istanbul and main purpose of visit by shoulder season

	British Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Primary	-	-	-	-	-	-	-	-	-	-	1	1.52	-	-	-	-	-	-	1	0.84
Second/High	18	30.5	1	100	7	18.4	2	25.0	28	26.4	18	27.3	-	-	6	15.4	1	14.3	28	23.5
College/Univ.	30	50.8	-	-	26	68.4	5	62.5	61	57.5	31	47.0	1	100	24	61.5	4	57.1	62	52.1
PG	11	18.6	-	-	5	13.2	1	12.5	17	16.0	15	22.7	-	-	9	23.1	1	14.3	26	21.8
NoneAbove	-	-	-	-	-	-	-	-	-	-	1	1.52	-	-	-	-	1	14.3	2	1.68
Total	59	100	1	100	38	100	8	100	106	100	66	100	1	100	39	100	7	100	119	100
	N 106 p= 0.43799 >0.05										N 119 p= 0.66394 >0.05									

** Columns for other ignorable purposes which had very small numbers are not placed in the table
*** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya

It was seen from the table that around 65% of all business related British visitors in Istanbul were college/university graduates. 68% in the first shoulder and 62% of all business related British visitors were college/university graduates. Some postgraduates were also businessman/women in Istanbul. Therefore it can be said that majority of business visitors formed by the college/university and postgraduate visitors in Istanbul. On the other hand, around 70% of British visitors whom purpose of visit holiday/vacation were also college/university graduates and postgraduates in both shoulders. However, while college/university graduates' share in total in all purposes decreased in the second shoulder , in contrast, the share of postgraduates in all purposes increased in the second shoulder. It is very interesting to see that V.F.R. visits were overwhelmingly realised by college/university graduates (63% in the first shoulder and 57% in the second shoulder). Secondary/high school graduates seem to prefer the first shoulder because a decrease was seen in the share of these visitors in total in all purposes in the second shoulder. Their share was decreased in holidaying visitors from 31% to 27%, from 18% to 15% in business visitors and from 25% to 14% in V.F.R. visitors.

As Table 4.55 indicates, all education level groups' main purpose of visit to Istanbul in both shoulders were holiday vacation. Business and V.F.R. purposes followed the holiday vacation purpose respectively. In terms of business purpose of visit, university or higher educated British visitors were in the first ranks in both shoulders. V.F.R. visits were distributed among secondary/high school and above graduates. However, there was a decrease in V.F.R. visits in the second shoulder in general. In short, all educational levels primary purpose holiday/vacation, and secondary purpose were business especially among university and postgraduate British visitors in both shoulders.

The Table 4.56 shows that some contrasts exist between British and German visitors to Istanbul in both shoulders. In contrast to 74% of all British visitors, only in average 43% of all German visitors received college/university and postgraduate education in both shoulders which meant that German visitors educational profile was much lower than British visitors to Istanbul. In addition,

the share of postgraduates in all German visitors was lower compared to British visitors. German educational groups indicated the same increases and decreases in the second shoulder with British visitors. While the share of secondary/high school (from 20% to 18) and college/university graduates (from 38% to 36%) decreased in the second shoulder, Primary school graduates' (from 38% to 39%) and postgraduates' share (from 4% to 7%) increased. Therefore it can be said that German and British secondary/high school and college/university graduates prefer visiting Istanbul in the first shoulder, and second shoulder is the choice of primary school and postgraduates.

Table 4.56 German Education level in Istanbul and main purpose of visit by shoulder season

	German Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Primary	34	43.0	6	46.2	7	18.9	1	33.3	52	37.7	25	40.3	4	44.4	7	28.0	1	50.0	39	38.6
Second/High	16	20.3	3	23.1	7	18.9	-	-	27	19.6	11	17.7	-	-	5	20.0	1	50.0	18	17.8
College/Univ	26	32.9	4	30.8	20	54.1	2	66.7	53	38.4	21	33.9	4	44.4	11	44.0	-	-	36	35.6
PG	3	3.8	-	-	3	8.11	-	-	6	4.35	5	8.06	-	-	2	8.0	-	-	7	6.93
NoneAbove	-	-	-	-	-	-	-	-	-	-	-	-	1	11.1	-	-	-	-	1	0.99
Total	79	100	13	100	37	100	3	100	138	100	62	100	9	100	25	100	2	100	101	100
	N 138 p= 0.35932 >0.05										N 101 p= 0.45733 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

All German educational groups gave another interesting and different picture compared to British visitors by higher cultural visit percentages in both shoulders. While Primary school graduates formed 46%, secondary/high school graduates 23% and college/university graduates 30% of all cultural visitors in the first shoulder, primary school graduates' share decreased to 44% and college/university graduates' share increased to 44% in the second shoulder.

It was seen from the table that around 62% in the first shoulder and 52% of all business related German visitors in Istanbul in the second shoulder were college/university and postgraduates. 55% in the first shoulder and 44% of all business related British visitors were college/university graduates. The share of postgraduates remained around 8% in both shoulders. Therefore it can be said that majority of German business visitors formed by the college/university and postgraduates in Istanbul as British visitors.

Unlike British visitors (70%) and despite slight increase in their share in the second shoulder, only 37% in the first shoulder and 42% of whom purpose of visit holiday/vacation were college/university graduates and postgraduates. The biggest group was primary school leavers (around 41%) in the total holidaying visitors in both shoulders. They were followed by university/college (around 33%) and high school leavers (around 19%). However, most significant increase was seen in postgraduates in the second shoulder from 4% to 8%.

As Table 4.56 indicates, all education level groups' favourite purposes of visit to Istanbul in both shoulders were holiday vacation and business purpose followed it. In terms of business purpose of visit, university or higher educated German visitors were in the first ranks in both shoulders. Different from the British visitors, the third rank was occupied by cultural purpose instead of V.F.R. visits. In short, all educational levels primary purpose holiday/vacation, and secondary purpose were business in both shoulders. The third purpose for German visitors in Istanbul was cultural.

Table 4.57 German Education level in Antalya and main purpose of visit by shoulder season

	German Visitors to Antalya																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Primary	143	49.7	2	22.2	1	50.0	2	100	149	49.3	176	66.7	4	50.0	-	-	1	100	183	65.6
Second/High	67	23.3	1	11.1	-	-	-	-	68	22.5	28	10.6	4	50.0	2	100	-	-	35	12.5
College/Univ	59	20.5	5	55.6	-	-	-	-	64	21.2	46	17.4	-	-	-	-	-	-	47	16.8
PG	14	4.86	1	11.1	1	50.0	-	-	16	5.3	8	3.03	-	-	-	-	-	-	8	2.87
NoneAbove	5	1.74	-	-	-	-	-	-	5	1.66	6	2.27	-	-	-	-	-	-	6	2.15
Total	288	100	9	100	2	100	2	100	302	100	264	100	8	100	2	100	1	100	279	100
	N 302 p= 0.49658 >0.05										N 279 p= 0.12455 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

As comparison of Table 4.57 and the Tables above reveals, education level of German visitors in Antalya much lower than both British and German visitors in Istanbul. In contrast to 74% of all British visitors and 43% of all German visitors in Istanbul in both shoulders, as low as 26% in the first shoulder and 20% of all German visitors in the second shoulder in Antalya received college/university and postgraduate education which meant that German visitors educational profile was much lower in Antalya, particularly in the second shoulder. The increase in the share of primary school leavers in total (from 49% to 66%) in the second shoulder and decrease in other confirms the above statement. Therefore it can be said that while German secondary/high school, college/university and postgraduates prefer visiting Antalya in the first shoulder, primary school leavers choose second shoulder.

The holiday/vacation purpose was the primary purpose of visit for most German visitors in Antalya in both shoulders. However, despite increase in the share of primary school leavers in all holidaying visitors (from 50% to 67%), the share of others decreased in the second shoulder. It was seen from the table that while 67% of cultural visitors in the first shoulder were college/university and postgraduates, 100% of all cultural German visitors in Antalya in the second shoulder were primary and secondary/high school graduates. In other words, cultural interest in Antalya moved from higher to lower educational groups.

As Table 4.57 indicates, all education level groups' favourite purposes of visit to Antalya in both shoulders were overwhelmingly holiday vacation and cultural purpose followed it with a very small

share. Except for secondary/high school graduates, share of holidaying visitors in total increased in the second shoulder. On the other hand, cultural interest was higher among university and postgraduate visitors in the first shoulder and among primary and especially secondary/high school graduates in the second shoulder. Thus this can be said that, although overwhelming majority of all educational groups' primary purpose was holiday/vacation, increasing interest was observed among university and postgraduate visitors towards cultural resources in Antalya in the first shoulder, and among primary and secondary/high school graduates in the second shoulder.

The main purpose of visit by income status

Significant differences were observed in the distribution of purpose of visit among British income groups in Istanbul in both shoulders (p=0.018 and p=0.003). As seen on Table 4.58 wide differences also exist in the share of income groups in total when first and second shoulders compared. Istanbul was popular for British visitors in both shoulders whose annual family income is over £30000. However, significant decrease was seen on the share of £30000+ income group in the second shoulder (from 65% and to 49%) as a result of increase in the share of income groups between £5000-£30000. In other words, while elite income group (£30000+) prefer visiting Istanbul in the first shoulder, lower income groups prefer the second shoulder.

Table 4.58 British income level in Istanbul and main purpose of visit by shoulder season

	British Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
- £5000	-	-	-	-	-	-	1	12.5	1	1.01	1	1.59	-	-	-	-	-	-	1	0.88
£5-10000	2	3.7	-	-	-	-	1	12.5	3	3.03	3	4.76	-	-	-	-	2	28.6	7	6.19
£11-15000	3	5.56	-	-	-	-	2	25.0	5	5.05	11	17.5	-	-	2	5.26	1	14.3	15	13.3
£16-20000	8	14.8	-	-	2	5.56	1	12.5	11	11.1	10	15.9	-	-	1	2.63	2	28.6	13	11.5
£21-30000	7	13.0	-	-	7	19.4	1	12.5	15	15.2	9	14.3	1	100	12	31.6	-	-	22	19.5
£30000+	34	63.0	1	100	27	75.0	2	25.0	64	64.6	29	46.0	-	-	23	60.5	2	28.6	55	48.7
Total	54	100	1	100	36	100	8	100	99	100	63	100	1	100	38	100	7	100	113	100
	N 99 p= 0.01868< 0.05										N 113 p= 0.00300< 0.05									

** Columns for other ignorable purposes which had very small numbers are not placed in the table
*** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya

The same result was reflected to the distribution of purposes of visit among income groups. While holidaying £30000+ group's share decreased in the second shoulder, groups' between £5000-£30000 share increased. Share of top two income groups share decreased about 15% in the second shoulder. Despite this decrease in the second shoulder, it can be said that, majority if holidaying visitors were in £20000 and over income groups and prefer first shoulder to second shoulder (76% and 60%). top income groups prefer first shoulder On the other hand, share of business visitors in different income groups indicated similar results. £30000+ group' share decreased and lower income groups' share increased in the second shoulder. However, despite decrease in £30000+ groups in the second shoulder, the combined share of £21000 and over income groups share was

around 93% in both shoulders (94% in the first shoulder, 92% in the second shoulder). In summary, British business visitors to Istanbul were in the highest income groups in both shoulders. V.F.R. visits also increased in the second shoulder.

Table 4.59 German income level in Istanbul and main purpose of visit by shoulder season

German Visitors to Istanbul																				
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
- £5000	5	7.94	-	-	1	2.94	-	-	6	5.22	11	20.0	1	16.7	1	4.76	-	-	13	14.9
£5-10000	6	9.52	3	25.0	3	8.82	1	50.0	14	12.2	4	7.27	1	16.7	1	4.76	2	100	8	9.2
£11-15000	10	15.9	3	25.0	-	-	1	50.0	15	13.0	7	12.7	-	-	-	-	-	-	7	8.05
£16-20000	16	25.4	2	16.7	1	2.94	-	-	20	17.4	7	12.7	2	33.3	2	9.52	-	-	13	14.9
£21-30000	11	17.5	1	8.33	5	14.7	-	-	18	15.7	14	25.5	1	16.7	11	52.4	-	-	26	29.9
£30000+	15	23.8	3	25.0	24	70.6	-	-	42	36.5	12	21.8	1	16.7	6	28.6	-	-	20	23.0
Total	63	100	12	100	34	100	2	100	115	100	55	100	6	100	21	100	2	100	87	100
	N 115 p= 0.00467< 0.05										N 87 p= 0.01502< 0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

All income groups' favourite purpose of visit in Istanbul was holiday/vacation in the first shoulder. It was same for the second shoulder except for £21-30000 income group in which share of business visitors in this group increased in the second shoulder. To generalise, all British income groups first purpose of visit to Istanbul was holiday/vacation, then business and after that V.F.R.

Similar to the British visitors, significant differences were also identified in the distribution of purpose of visit among German income groups in Istanbul in both shoulders (p=0.004 and p=0.015). As Table 4.59 illustrates, comparison of the share of income groups in total indicated deviations between shoulders. -£5000 group almost tripled (from 5% to 15%) and £21-30000 group (from 16% to 30%) doubled their share in total in the second shoulder, the share of other groups remained higher in the first shoulder. In other words, while German lowest income group and upper-middle income group preferred visiting Istanbul in the second shoulder, other groups, including middle and upper income groups, preferred the first shoulder.

The same result was reflected to the distribution of purposes of visit among income groups. While holidaying -£5000 group's share about 2.5 times and £21-30000 groups share increased about 1.5 times in the second shoulder, other income groups share in all holidaying visitors were higher in the first shoulder. Despite the decrease in the second shoulder in the share of £30000 group, share of top two income groups combined share increased in the second shoulder. 41% holidaying visitors in the first shoulder and 47% in the second shoulder were in £20000 and over income groups. On the other hand, share of business visitors in the £30000+ group's share decreased and lower income groups' share increased in the second shoulder, as it happened among British visitors. However, despite decrease in £30000+ group's share in the second shoulder, the combined share of £21000 and over income groups' share was around above 80% in both shoulders (85% in the first shoulder, 81% in the second shoulder). In summary, German business visitors to Istanbul

were in the highest income groups in both shoulders. Share of German cultural visitors was higher in the first shoulder (10%) compared to second shoulder (7%) because majority of income groups' share in total cultural visitors were higher in the first shoulder.

Table 4.60 German income level in Antalya and main purpose of visit by shoulder season

German Visitors to Antalya																				
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
- £5000	29	13.1	1	11.1	-	-	1	50.0	31	13.2	13	6.16	-	-	-	-	1	100	14	6.31
£5-10000	27	12.2	-	-	-	-	-	-	28	11.9	36	17.1	1	16.7	-	-	-	-	37	16.7
£11-15000	46	20.8	2	22.2	-	-	1	50.0	49	20.9	40	19.0	1	16.7	-	-	-	-	41	18.5
£16-20000	35	15.8	2	22.2	1	50.0	-	-	38	16.2	51	24.2	2	33.3	1	100	-	-	54	24.3
£21-30000	48	21.7	1	11.1	-	-	-	-	49	20.9	39	18.5	2	33.3	-	-	-	-	41	18.5
£30000+	36	16.3	3	33.3	1	50.0	-	-	40	17.0	32	15.2	-	-	-	-	-	-	35	15.8
Total	221	100	9	100	2	100	2	100	235	100	211	100	6	100	1	100	1	100	222	100
	N 235 p= 0.52681 >0.05										N 222 p= 0.01397< 0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

All income groups' favourite purpose of visit in Istanbul was holiday/vacation in the second shoulder. It was same for the first shoulder except for £30000+ income group in which share of business visitors in this group higher than the holidaying visitors in the first shoulder. To generalise, all German income groups first purpose of visit to Istanbul was holiday/vacation, then business and after that cultural.

Although significant relationship was found between the purpose of visit and the family income level among German visitors in Antalya in the second shoulder (p=0.01397), no important relationship was found in the first shoulder (p=0.52681) (Table 4.60). Except for only one business and one VFR visitors in Antalya in the second shoulder, all other German visitors concentrated on the holiday/vacation in particular and cultural purposes in the second shoulder. Comparison of the share of income groups in total indicated deviations between shoulders. Except for £5-10000 and £16-20000 groups in Antalya, all other income groups lost their share in total in the second shoulder. In other words, while German lower-middle and upper-middle income group preferred visiting Antalya in the second shoulder, other groups, including lowest, middle and upper income groups, preferred the first shoulder.

The same result was exactly reflected to the distribution of holidaying German visitors among income groups. While holidaying £5000-10000 group's share (from 12% to 17%) and £16-20000 groups share (from 16% to 24%) increased in the second shoulder, other income groups share in all holidaying visitors were higher in the first shoulder. Despite the decrease in the second shoulder in the share of top two income groups (£21000+), share of above middle income groups (£16000+) combined share increased in the second shoulder (from 54% to 58%).

Share of German cultural visitors to Antalya was higher in the first shoulder (4%) compared to second shoulder (3%) because majority of income groups' share in total cultural visitors were higher in the first shoulder. All income groups' favourite purpose of visit in Antalya also was holiday/vacation both shoulders. In short, all German income groups first purpose of visit to Antalya was holiday/vacation, then cultural.

The main purpose of visit by family status

Crosstabulations did not indicate significant changes in the visit purposes of British family status groups to Istanbul and German visitors to Istanbul and Antalya in the first and second shoulders. British and German visitors' main purposes of visit were observed as Holiday/Vacation and Business in both shoulders in Istanbul and Holiday/Vacation in Antalya. Cultural purpose of visit was confirmed as the most important secondary purpose of visit for British and German visitors.

Table 4.61 British Family status in Istanbul and main purpose of visit by shoulder season

	British Visitors to Istanbul (Main Purpose of Visit))											
	1st Shoulder						2nd Shoulder					
	Holid.	Cultu.	Shopp.	Busin.	V.F.R.	Total	Holid.	Cultu.	Shopp.	Busin.	V.F.R.	Total
Single	10	-	-	5	3	18	21	-	1	8	1	31
Couple	4	-	-	3	2	9	10	-	-	4	-	15
Married	38	1	-	27	3	69	30	1	-	24	6	65
Div./Separ.	4	-	-	2	-	6	3	-	-	3	-	6
Widowed	3	-	-	1	-	4	2	-	-	-	-	2
Single par.	-	-	-	-	-	-	-	-	-	-	-	-
Total	59	1	-	38	8	106	66	1	1	39	7	119
	N 106 p= 0.77903 >0.05						N 119 p= 0.82053 >0.05					

** Columns for None of Above are not placed in the table
***British visitors in Antalya in the first and second shoulders were not computed because of lack of British visitors to Antalya

As the major family status group, married British visitors form the largest group in all main and secondary purposes of visit. The groups' preferences of time of visit (shoulder) indicate differences. While the number of British visitors whose main purpose of visit is holiday/vacation increases in singles (from 17% to 32%) and couples (from 7% to 15%), the number of married (from 64% to 45%), divorced/separated and widows indicate decrease in the second shoulder (Table 4.61). The same situation was observed in the secondary purpose as well. In other words, in contrast to holidaying married, divorced/separated and widow British visitors who prefer more first shoulder, singles and couples prefer more second shoulder. Business visitors do not indicate significant differences as holidaying visitors (Table 4.62).

Table 4.62 British Family status in Istanbul and Secondary purpose of visit by shoulder season

	British Visitors to Istanbul (Secondary Purpose of Visit)											
	1st Shoulder						2nd Shoulder					
	Holid.	Cultu.	Shopp.	Busin.	V.F.R.	Total	Holid.	Cultu.	Shopp.	Busin.	V.F.R.	Total
Single	5	2	-	-	-	8	2	15	-	-	2	19
Couple	1	2	-	-	-	3	2	4	-	3	-	9
Married	5	22	-	-	2	31	4	16	1	2	2	28
Div./Separ.	1	2	-	-	-	3	-	3	-	-	-	3
Widowed	-	1	-	-	1	3	-	1	1	-	-	2
Single par.	-	-	-	-	-	-	-	-	-	-	-	
Total	12	29	-	-	3	48	8	39	2	5	4	61
	N 48 p= 0.17048 >0.05						N 61 p= 0.04734< 0.05					
** Columns for None of Above are not placed in the table.												

German visitors also visit Istanbul for mainly Holiday/Vacation and Business purposes and as British visitors, German visitors also does not indicate important differences between shoulders in terms of family status groups and main purpose of visit (Table 4.63). Their secondary purpose of visit observed as cultural and shopping purpose especially in the second shoulder (Table 4.64).

Table 4.63 German Family status in Istanbul and main purpose of visit by shoulder season

	German Visitors to Istanbul (Main Purpose of Visit)											
	1st Shoulder						2nd Shoulder					
	Holid.	Cultu.	Shopp	Busin.	V.F.R	Total	Holid.	Cultu.	Shopp	Busin.	V.F.R	Total
Single	15	3	-	11	1	33	22	3	-	8	-	34
Couple	9	3	-	1	-	13	8	-	-	3	-	12
Married	46	7	-	24	2	81	29	4	1	12	1	48
Div./Separ	4	-	-	1	-	5	3	-	-	2	1	6
Widowed	4	-	-	-	-	5	-	1	-	-	-	1
Single par.	-	-	-	-	-	-	-	-	-	-	-	-
Total	78	13	-	37	3	137	62	8	1	25	2	101
	N 137 p= 0.44727 >0.05						N 101 p= 0.26229 >0.05					
** Columns for None of Above are not placed in the table.												

However, although German family status groups to Istanbul do not show considerable differences in terms of main and secondary purpose of visit in the first and second shoulders (Table 4.63, 109), they indicate very significant changes in Antalya (Table 4.65). Except for few German visitors whose main purpose of visit is cultural, almost all German visitors visit Antalya for only holiday/vacation purposes in both shoulders. It is worth noting that in both shoulders, the major family status group is married group. However, while married visitors with holiday purpose form 49% of all German visitors to Antalya in the first shoulder, this proportion increases to 61% in the second shoulder. In contrast to increase in married visitors, number of singles, couples, divorced/separated and widowed visitors with holiday purpose decreased in the second shoulder. Single parents showed a small increase.

Table 4.64 German Family status in Istanbul and Secondary purpose of visit by shoulder season

	German Visitors to Istanbul (Secondary Purpose of Visit)											
	1st Shoulder						2nd Shoulder					
	Holid.	Cultu.	Shopp	Busin.	V.F.R	Total	Holid.	Cultu.	Shopp	Busin.	V.F.R	Total
Single	2	7	-	-	-	11	-	10	4	1	-	15
Couple	-	2	2	-	-	6	-	4	2	-	-	6
Married	1	21	2	1	-	25	1	8	4	4	1	18
Div./Separ	-	-	-	-	-	-	-	1	1	-	-	2
Widowed	-	3	-	-	-	3	-	-	-	-	-	-
Single par.	-	-	-	-	-	-	-	-	-	-	-	-
Total	3	33	4	1	-	45	1	23	11	5	1	41
	N 45 p= 0.09161 >0.05						N 41 p= 0.86443 >0.05					
** Columns for None of Above are not placed in the table.												

Table 4.65 German Family status in Antalya and main purpose of visit by shoulder season

	German Visitors to Antalya ((Main Purpose of Visit)											
	1st Shoulder						2nd Shoulder					
	Holid.	Cultu.	Shopp	Busin.	V.F.R	Total	Holid.	Cultu.	Shopp	Busin.	V.F.R	Total
Single	64	2	-	1	1	69	38	-	-	1	1	40
Couple	60	2	-	-	1	63	47	2	-	-	-	49
Married	146	5	-	-	-	151	163	4	-	-	-	169
Div./Separ	17	-	-	-	-	17	9	1	-	1	-	12
Widowed	8	-	-	-	-	8	6	1	-	-	-	8
Single par.	2	-	-	1	-	3	3	-	-	-	-	3
Total	297	9	-	2	2	311	266	8	-	2	1	281
	N 311 p= 0.00001< 0.05						N 281 p= 0.00899< 0.05					
** Columns for None of the Above was not shown on the table.												

Table 4.66 German Family status in Antalya and Secondary purpose of visit by shoulder season

	German Visitors to Antalya (Secondary Purpose of Visit)											
	1st Shoulder						2nd Shoulder					
	Holid.	Cultu.	Shopp	Busin.	V.F.R	Total	Holid.	Cultu.	Shopp	Busin.	V.F.R	Total
Single	3	24	1	1	1	31	-	8	-	-	1	10
Couple	2	15	1	-	1	20	2	10	1	-	-	14
Married	1	56	1	1	2	62	1	55	3	-	1	61
Div./Separ	-	6	-	-	-	7	-	3	1	-	-	5
Widowed	-	3	-	-	-	3	1	1	-	-	-	2
Single par.	-	-	-	-	-	-	-	1	-	-	-	-
Total	6	104	3	2	4	123	4	78	5	-	2	93
	N 123 p= 0.94476 < 0.05						N 93 p= 0.13304 > 0.05					
** Columns for None of Above are not placed in the table.												

As Table 4.66 indicates, around 84% of all German visitors to Antalya secondarily prefer visiting Antalya for cultural purposes. While the proportion of married German visitors increases from 54% to 71%, single, couple, divorced/separated and widows indicates decrease in the second shoulder. In short, German visitors prefers Antalya primarily for holiday purposes and secondarily for the cultural purposes, and while married and single parents prefer more visiting Antalya in the second shoulder and others in the first shoulder.

The main purpose of visit by having children home

Table 4.67 illustrates that significant differences existed in the first shoulder (p=0.007), but second shoulder did not indicate important differences (p=0.123). Both shoulders showed that majority of British visitors to Istanbul did not have any children living with them. However, their share increased from 56% in the first shoulder to 62% in the second shoulder. Consequently, share of visitor with children living home together decreased from 44% in the first shoulder to 38% in the second shoulder.

Table 4.67 British visitors who have children at home in Istanbul and main purpose of visit by shoulder season

	British Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Have child	17	34.7	1	100	21	63.6	-	-	39	44.3	12	26.7	1	100	15	50.0	3	60.0	32	37.6
Don't have	32	65.3	-	-	12	36.4	5	100	49	55.7	33	73.3	-	-	15	50.0	2	40.0	53	62.4
Total	49	100	1	100	33	100	5	100	88	100	45	100	1	100	30	100	5	100	85	100
	N 88 p= 0.00716< 0.05										N 85 p= 0.12303 >0.05									

** Columns for other ignorable purposes which had very small numbers are not placed in the table
*** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya

The same situation was reflected to holidaying and business visitors share in total as well. It can be said that holidaying (35%) and business (64%) British visitors with children preferred first shoulder, holidaying (73%) and business (50%) visitors with no children living with them chose second shoulder for visiting Istanbul. It is worth noting that majority of business visitors had children and while majority of holidaying British visitors did not have children living home with them in both shoulders.

When row percents are analysed, it is obvious that majority of British visitors with children in both shoulders were formed by business visitors. 54% in the first shoulder and 47% of all visitors with children were business visitors. In contrast, majority of, 65% in the first shoulder and 62% in the second shoulder, all British visitors with no children were formed by holidaying visitors.

As Table 4.68 indicates no significant differences existed and significance level was almost identical in both shoulders. Ratio of German visitors with children to visitors who did not have any children living with them was almost same in both shoulders. However, even it was small differences, while the share of visitors who did not have children increased from 48% in the first shoulder to 48% in the second shoulder, share of visitors with children went down from 52% to 52% in the second shoulder. Unlike British visitors in Istanbul, the Majority of German visitors to Istanbul did have children living with them in both shoulders.

Table 4.68 German visitors who have children at home in Istanbul and main purpose of visit by shoulder season

	German Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Have child	31	52.5	3	33.3	15	62.5	-	-	50	52.1	15	40.5	4	80.0	11	64.7	1	50.0	33	51.6
Don't have	28	47.5	6	66.7	9	37.5	2	100	46	47.9	22	59.5	1	20.0	6	35.3	1	50.0	31	48.4
Total	59	100	9	100	24	100	2	100	96	100	37	100	5	100	17	100	2	100	64	100
	N 96 p= 0.34330 >0.05										N 64 p= 0.35382 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

Holidaying and cultural visitors indicate important changes between shoulders. Increase was seen in the share of Holidaying German visitors with no children in the second shoulder (from 48% to 60%), in contrast, visitors' with children decreased from 53% in the first shoulder to 41% in the second shoulder. In this respect, German visitors with children prefer first shoulder, visitors with no children prefer second shoulder to visit Istanbul with holiday vacation purposes. Share of cultural visitors with children increased in the second shoulder (from 33% to 80%). On the other hand, share of business visitors with or with no children did not indicate significant deviations between shoulders. German visitors with children were in the majority in both shoulders. To sum up, while most holidaying German visitor with children preferring first shoulder, and other visitors with children and with other purposes choosing second shoulder to visit Istanbul, most holidaying visitors with no children preferred second shoulder and other visitors with other purposes favoured the first shoulder.

It is obvious from the table above that the majority of German visitors with children and with no children in both shoulders were formed by holidaying visitors. Secondary purpose business and third purpose were cultural for both groups.

Although Chi-square results do not indicate differences in both shoulders, the comparisons of shares of visitors with and with no children between shoulders indicate quite important differences. Although visitor with no children were in the majority in both shoulders, 63% German visitors with no children went down to 58% in the second shoulder while visitors with children going up from 37% to 42%. While more German visitors with no children preferring first shoulder, more visitors with children preferred second shoulder to visit Antalya (Table 4.69).

The weight of holiday/vacation an cultural purposes was felt in Antalya in both shoulders. About 60% of all holidaying visitors do not have children in both shoulders. However a decrease was seen in the share of German visitors with no children in the second shoulder while the share of visitors with children increased (from37% to 42%). Although small number of German visitors' main purpose of visit was cultural, it was observed that share of visitors with children preferred first

shoulder while visitors with no children preferred second shoulder to visit Antalya for cultural purposes.

Table 4.69 German visitors who have children at home in Antalya and main purpose of visit by shoulder season

	German Visitors to Antalya																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Have child	81	37.2	3	37.5	1	100	-	-	85	37.3	88	42.1	2	25.0	1	100	-	-	92	42.0
don't have	137	62.8	5	62.5	-	-	1	100	143	62.7	121	57.9	6	75.0	-	-	-	-	127	58.0
Total	218	100	8	100	1	100	1	100	228	100	209	100	8	100	1	100	-	-	219	100
	N 228 p= 0.88501 >0.05										N 219 p= 0.29432 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

More than 95% of German visitors' in both groups main purpose of visit was holiday in both shoulders in Antalya. Share of holidaying visitors each group's total did not indicate significant fluctuations between shoulders. However, cultural interest was the second important purpose among visitors with children in the first shoulder and among visitors with no children in the second shoulder.

The main purpose of visit by number of children

Chi-square results do not indicate significant differences in both shoulders. It was seen that majority of visitors with children did have only one child in both shoulders. Share of visitors with only one child increased from 67% in the first shoulder to 78% in the second shoulder. On the other hand, more visitors with two (28%) and three children (5%) preferred the first shoulder (Table 4.70).

Table 4.70 British visitors' no of children at home in Istanbul and main purpose of visit by shoulder season

	British Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
One	12	70.6	-	-	14	66.7	-	-	26	66.7	9	75.0	-	-	12	80.0	3	100	25	78.1
Two	4	23.5	1	100	6	28.6	-	-	11	28.2	3	25.0	1	100	2	13.3	-	-	6	18.8
Three	1	5.88	-	-	1	4.76	-	-	2	5.13	-	-	-	-	1	6.67	-	-	1	3.13
Total	17	100	1	100	21	100	-	-	39	100	12	100	1	100	15	100	3	100	32	100
	N 39 p= 0.60192 >0.05										N 32 p= 0.54346 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table *** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya																				

Most holiday/vacation and business visitors had only one child in Istanbul in both shoulders. 71% in the first and 75% in the second shoulder of all holidaying British visitors had only one child. The remaining 25-30% holidaying visitors had more than one child in both shoulders. On the other hand, 67% in the first shoulder and 80% of British business visitors did have only one child. Although British business visitors with two children preferred first shoulder, other holidaying and business visitors in Istanbul with one or more children preferred more second shoulder.

Table 4.71 German visitors' no of children at home in Istanbul and main purpose of visit by shoulder season

	German Visitors to Istanbul																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
One	25	80.6	2	66.7	12	80.0	-	-	40	80.0	12	80.0	4	100	10	90.9	-	-	28	84.8
Two	6	19.4	1	33.3	3	20.0	-	-	10	20.0	2	13.3	-	-	1	9.09	1	100	4	12.1
Three	-	-	-	-	-	-	-	-	-	-	1	6.67	-	-	-	-	-	-	1	3.03
Total	31	100	3	100	15	100	-	-	50	100	15	100	4	100	11	100	1	100	33	100
	N 50 p= 0.89840 >0.05										N 33 p= 0.48540 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

There was a decrease in the total share of holidaying visitors' share from 44% to 38% and business visitors' share (from 54% to 47%) in total in the second shoulder. The main purpose of around 46% in the first shoulder and 36% of British visitors with only one child in the second shoulder was holiday/vacation. 54% and 48% of visitors' with one child main purpose was business in the first and second shoulder respectively. As noticed, except for visitors with two children whom majority of them were holidaying visitors in the second shoulder (50%), most visitors with one or more children were business visitors in both shoulders.

Chi-square results also do not indicate differences in both shoulders. Although they did not indicate differences between shoulders as big as British visitors, share of German visitors with only one child increased from 80% in the first shoulder to 85% in the second shoulder. On the other hand, more visitors with two children (20%) preferred the first shoulder compared to second shoulder (12%) (Table 4.71).

Most German holiday/vacation and business visitors also had only one child in Istanbul in both shoulders. 80% of all holidaying German visitors had only one child in both shoulders. 80% to 90% German business visitors and 67% to 100% cultural visitors also had one child in the first and second shoulder respectively. In short, majority of German visitors with one child in all purpose groups preferred the second shoulder while visitors with two children preferring more first shoulder.

There was a decrease in the total share of holidaying visitors' share in total in the second shoulder from 62% to 45% while increase was observed in the share of all other purposes. As observed among British visitors, holidaying German visitors with one child also indicated a decrease in the second shoulder. The main purpose of 63% in the first shoulder and 43% of German visitors with only one child in the second shoulder was holiday/vacation. 30% and 36% of visitors' with one child main purpose was business in the first and second shoulder respectively. Cultural visitors with one child also recorded considerable increase in the second shoulder (from 5% to 14%). To sum up, it can be said that holidaying visitors (German and British) with one child who are the major group among visitors with children prefer first shoulder to visit Istanbul.

Same as visitors in Istanbul, Chi-square results did not indicate significant differences in both shoulders (Table 4.72). Unlike visitors in Istanbul, share of German visitors with only one child in Antalya decreased from 83% in the first shoulder to 71% in the second shoulder. On the other hand, more visitors with two or more children (29%) preferred the second shoulder compared to first shoulder (17%).

Table 4.72 German visitors' no of children at home in Antalya and main purpose of visit by shoulder season

	German Visitors to Antalya																			
	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
One	68	85.0	1	33.3	1	100	-	-	70	83.3	62	70.5	1	50.0	1	100	-	-	65	70.7
Two	12	15.0	2	66.7	-	-	-	-	14	16.7	24	27.3	1	50.0	-	-	-	-	25	27.2
Three	-	-	-	-	-	-	-	-	-	-	1	-	-	-	-	-	-	-	1	1.09
Four	-	-	-	-	-	-	-	-	-	-	1	1.14	-	-	-	-	-	-	1	1.09
Total	80	100	3	100	1	100	-	-	84	100	88	100	2	100	1	100	-	-	92	100
	N 84 p= 0.05613 >0.05										N 92 p= 0.99792 >0.05									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

Most German holiday/vacation visitors had only one child in Antalya in both shoulders. 85% in the first shoulder and 70% of all holidaying German visitors in the second shoulder had only one child. As mentioned, while the share of holidaying visitors with one child decreased in the second shoulder, the share of visitors with two or more children increased (from 15% to 29%) In short, majority of holidaying German visitors with two or more children preferred the second shoulder while visitors with one child preferring more first shoulder.

The total share of holidaying visitors' share in general total remained same in both shoulders (95%).There was a small decrease in the share of holidaying visitors' share in all visitors with one child in the second shoulder (from 97% to 95%) while increase was observed in the share of holidaying visitors in all visitors with two or more children. As observed among British an German visitors in Istanbul, holidaying German visitors with one child in Antalya also indicated a decrease

in the second shoulder. The share of holidaying visitors in all visitors with two children increased from 86% in the first shoulder to 96% in the second shoulder. To sum up, it can be said that while holidaying German visitors with one child who are the major group among visitors with children preferring first shoulder, choice of holidaying visitors with two or more children to visit Antalya was second shoulder.

In addition, analysis of number of all British and German visitors' children by number and by age groups in all shoulders indicated that when number of children increases number of visitor in off-season decreases. In other words, most off-season visitors (69%) have only one child. It was worth noting that the share of visitors with children aged 12 or less and 21+ among visitors with one and two children groups were notably high. It can be said more than half of all visitors (56%) with one or two children and in the age groups of 12 or less and 21+ (Table 4.73).

Table 4.73 Visitors with children by number of children

	Count	Response %	Cases %
1 child at home aged 12 or less	80	18.9	23.6
1 child at home aged 13-16	63	14.9	18.6
1 child at home aged 17-20	62	14.7	18.3
1 child at home aged 21+	85	20.1	25.1
Visitors with only one child Sub-Total	*290*	*68.6*	*85.5*
2 children at home aged 12 or less	41	9.7	12.1
2 children at home aged 13-16	24	5.7	7.1
2 children at home aged 17-20	21	5.0	6.2
2 children at home aged 21+	31	7.3	9.1
Visitors with two children Sub-Total	*117*	*27.7*	*34.5*
3 children at home aged 12 or less	9	2.1	2.7
3 children at home aged 21+	6	1.4	1.8
Visitors with three children Sub-Total	*15*	*3.5*	*4.4*
4 children at home aged 12 or less	1	0.2	0.3
Visitors with four children Sub-Total	*1*	*0.2*	*0.3*
Total Responses	423	100	124.8
	Response 423 Case 339		

The main purpose of visit by age of children

Table 4.74 and following two tables explain the relationship between the purpose of visit and number of visitors' children by age groups and by nationality, shoulder and survey place. The number on the table indicates only the actual number of children in each purpose groups and therefore they do not represent the number of visitors. Thus, a visitor in a certain purpose group can have more than one child and these children can fall in to different age groups. Total numbers of children in each purpose group are shown in the row named Total Respondents N while the number of visitors are shown under the name of Total Case N. These case and respondent totals make the calculation of average number of children of visitors in each purpose group possible as well. For example, 71 British visitors had total of 94 children and 260 German visitors had 320 children. In this case a British visitor had 1.3 and German visitors had 1.2 children in average.

It is interesting to see that while majority of British visitors' children were younger, 64% were aged 16 or below, most German visitors' children were in the older age groups, 53% were aged 17 or over. The major group among British visitors were children aged 12 or less (37%) and 18% of them were in the sub-group of one child aged 12 or less. On the other hand, The superior group German visitors were children aged 21 or over (32%) and 22% of them were in the sub-group of one child aged 21 or over. In other words, most British visitors had one child aged 12 or less and most German visitors had one child aged 21 or over. Meanwhile, the second major groups were children aged 21 or over for British visitors and children aged 12 or less for German visitors.

Table 4.74 "No of children in each age group" and main purpose of visit by nation

	British visitors										German visitors									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
1-12 or less	5	13.2	1	25.0	8	16.7	2	66.7	17	18.1	46	17.4	4	25.0	7	21.2	1	50.0	60	18.8
2-12 or less	4	10.5	-	-	10	20.8	-	-	14	14.9	14	5.3	1	6.3	10	30.3	-	-	25	7.8
3-12 or less	2	5.3	-	-	1	2.1	-	-	3	3.2	4	1.5	-	-	2	6.1	-	-	6	1.9
4-12 or less	1	2.6	-	-	-	-	-	-	1	1.1	-	-	-	-	-	-	-	-	-	-
Sub-Total	*12*	*31.6*	*1*	*25.0*	*19*	*39.6*	*2*	*66.7*	*35*	*37.2*	*64*	*24.2*	*5*	*31.3*	*19*	*57.6*	*1*	*50.0*	*91*	*28.4*
1-age 13-16	7	18.4	1	25.0	8	16.7	-	-	16	17.0	38	14.3	3	18.8	4	12.1	1	50.0	46	14.4
2-age 13-16	2	5.3	-	-	7	14.6	-	-	9	9.6	9	3.4	1	6.3	5	15.2	-	-	15	4.7
Sub-Total	*9*	*23.7*	*1*	*25.0*	*15*	*31.3*	-	-	*25*	*26.6*	*47*	*17.7*	*4*	*25.0*	*9*	*27.3*	*1*	*50.0*	*61*	*19.1*
1-age 17-20	4	10.5	1	25.0	5	10.4	-	-	10	10.6	46	17.4	1	6.3	3	9.1	-	-	50	15.6
2-age 17-20	3	7.9	-	-	1	2.1	-	-	4	4.3	16	6.0	-	-	1	3.0	-	-	17	5.3
Sub-Total	*7*	*18.4*	*1*	*25.0*	*6*	*12.5*	-	-	*14*	*14.9*	*62*	*23.4*	*1*	*6.3*	*4*	*12.1*	-	-	*67*	*20.9*
1-age 21+	8	21.1	1	25.0	5	10.4	1	33.3	15	16.0	63	23.8	4	25.0	1	3.0	-	-	69	21.6
2-age 21+	2	5.3	-	-	3	6.3	-	-	5	5.3	24	9.1	1	6.3	-	-	-	-	26	8.1
3-age 21+	-	-	-	-	-	-	-	-	-	-	5	1.9	1	6.3	-	-	-	-	6	1.9
Sub-Total	*10*	*26.3*	*1*	*25.0*	*8*	*16.7*	*1*	*33.3*	*20*	*21.3*	*92*	*34.7*	*6*	*37.5*	*1*	*3.0*	-	-	*101*	*31.6*
n	38	100	4	100	48	100	3	100	94	100	265	100	16	100	33	100	2	100	320	100
N	29	40.8	2	2.8	36	50.7	3	4.2	71	100	214	82.3	12	4.6	29	11.2	1	0.4	260	100
Avg.child	*1.31*		*2.0*		*1.33*		*1.0*		*1.32*		*1.24*		*1.33*		*1.14*		*2.0*		*1.23*	
	Case N 71 Response n 95 p= NA										Case N 260 Response n 323 p= NA									

** Columns for other ignorable purposes which had very small numbers are not placed in the table
*** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya

The same results were reflected to holidaying visitors which was the most important purpose of visit for both nations. The holidaying British visitors' children aged 16 or less who are assumed as within the range of school ages were in the majority with 55%. Remaining 45% of all holidaying visitors' children were in the 17 and over age group. In contrast, 58% of all holidaying German visitors' children were aged 17 and over, and both nations in these age groups overwhelmingly had only one child. In other words, most holidaying British visitors had one child aged 16 or less and most German visitors had one child aged 21 or over. British and German business visitors did not indicate contrasts. 71% of all British business visitors' and 85% of all German business visitors' children were aged 16 or less and most of the visitors had two children in this age group. As business visitors, majority (56%) of German cultural visitors' children were aged 16 or less as well.

The analysis of the Table 4.74 by rows indicated that British business visitors with children were in majority in almost all age groups except for group of children aged 21 and over in which

holidaying visitors had the majority (50%). 57% of British visitors' children aged 16 or less were business and remaining 35% were holidaying visitors' children. In contrast, 50% of British visitors' children aged 17 or over were holidaying and remaining 41% were business visitors' children. In other words, parents of majority of British children aged below 16 were business and children's parents aged over 17 were holidaying visitors. Therefore, it can be said that British visitors with children aged 17 and over feel freer to visit Turkey for holiday/vacation purposes and business visits are not directly affected by the age and number of children.

On the other hand, overwhelming considerable weight of holidaying visitors were felt among all age groups of German visitors' children. 73% of German visitors' children aged 16 or less were holidaying and only 18% were business visitors' children. Share of holidaying German visitors' children got even higher in total of 17 and over age group. 92% of German visitors' children aged 17 and over were holidaying visitors' and only 3% were business visitors' children. In other words, majority of German children's parents were holidaying visitors. The higher share of holidaying German visitors' children indicated that German visitors with children aged 17 and over also feel more free to visit Turkey for holiday/vacation purposes.

While majority of visitors' children were younger in the first shoulder, 54% were aged 16 or below, most visitors' children were in the older age groups in the second shoulder, 52% were aged 17 and over. The major group among first shoulder visitors were children aged 21 and over (32%) and 24% of them were in the sub-group of one child aged 21 and over. On the other hand, the superior group in the second shoulder visitors were children aged 12 or less (32%) and 19% of them were in the sub-group of one child aged 12 or less. In other words, most first shoulder visitors had one child aged 21 and over and most second shoulder visitors had one child aged 12 or less. Meanwhile, the second major groups were children aged 12 or less for first shoulder visitors (29%) and children aged 21 and over for second shoulder visitors (27%) (Table 4.75).

The holidaying visitors' children aged 17 and over were in the majority in total of holidaying visitors with 53% and 60% respectively in both shoulders and once again both shoulder visitors in these age groups mainly had only one child. In other words, most holidaying visitors had one child aged 17 and over in both shoulders, particularly in the second shoulder. The first and second shoulder cultural and business visitors did not indicate significant contrasts. 74% of first shoulder business visitors' and 81% of second shoulder business visitors' children were aged 16 or less and most of them had two children in this age group. As business visitors, majority (55%) of cultural visitors' children in both shoulders were aged 16 or less as well.

Table 4.75 "No of children in each age group" and main purpose of visit by shoulder

	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
1-12 or less	26	17.1	2	18.2	10	20.4	-	-	39	18.3	25	16.6	3	33.3	5	15.6	3	60.0	38	18.9
2-12 or less	10	6.6	-	-	9	18.4	-	-	19	8.9	8	5.3	1	11.1	11	34.4	-	-	20	9.95
3-12 or less	2	1.3	-	-	1	2.0	-	-	3	1.4	4	2.65	-	-	2	6.25	-	-	6	2.99
4-12 or less	1	0.7	-	-	-	-	-	-	1	0.5	-	-	-	-	-	-	-	-	-	-
Sub-Total	*39*	*25.7*	*2*	*18.2*	*20*	*40.8*	-	-	*62*	*29.1*	*37*	*24.5*	*4*	*44.4*	*18*	*56.3*	*3*	*60.0*	*64*	*31.8*
1-age 13-16	26	17.1	3	27.3	7	14.3	-	-	36	16.9	19	12.6	1	11.1	5	15.6	1	20.0	26	12.9
2-age 13-16	7	4.6	1	9.09	9	18.4	-	-	17	8.0	4	2.65	-	-	3	9.38	-	-	7	3.48
Sub-Total	*33*	*21.7*	*4*	*36.4*	*16*	*32.7*	-	-	*53*	*24.9*	*23*	*15.2*	*1*	*11.1*	*8*	*25*	*1*	*20.0*	*33*	*16.4*
1-age 17-20	14	9.2	1	9.09	5	10.2	-	-	20	9.4	36	23.8	1	11.1	3	9.38	-	-	40	19.9
2-age 17-20	9	5.9	-	-	2	4.1	-	-	11	5.2	10	6.62	-	-	-	-	-	-	10	4.98
Sub-Total	*23*	*15.1*	*1*	*9.09*	*7*	*14.3*	-	-	*31*	*14.6*	*46*	*30.5*	*1*	*11.1*	*3*	*9.38*	-	-	*50*	*24.9*
1-age 21+	44	28.9	3	27.3	4	8.2	-	-	51	23.9	27	17.9	2	22.2	2	6.25	1	20.0	33	16.4
2-age 21+	11	7.2	1	9.09	2	4.1	-	-	14	6.6	15	9.93	-	-	1	3.13	-	-	17	8.46
3-age 21+	2	1.3	-	-	-	-	-	-	2	0.9	3	1.99	1	11.1	-	-	-	-	4	1.99
Sub-Total	*57*	*37.5*	*4*	*36.4*	*6*	*12.2*	-	-	*67*	*31.5*	*45*	*29.8*	*3*	*33.3*	*3*	*9.38*	*1*	*20.0*	*54*	*26.9*
n	152	100	11	100	49	100	-	-	213	100	151	100	9	100	32	100	5	100	201	100
N	128	73.6	7	4.02	38	21.8	-	-	174	100	115	73.2	7	4.5	27	17.2	4	2.5	157	100
Avg.child	*1.19*		*1.57*		*1.29*		-		*1.22*		*1.31*		*1.29*		*1.19*		*1.25*		*1.28*	
	Case N 174 Response n 213 p= NA										Case N 157 Response n 201 p= NA									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

Holidaying visitors with children were in majority in almost all age groups in both shoulders. Around 63% of visitors' children aged 16 year or less were holidaying visitors', 30% were business visitors' and 5% were cultural visitors' children in both shoulders. However, the share of holidaying visitors' children aged 17 or over was even higher, but the share of business visitors' children in this age group was rather low in both shoulders compared to 16 or less age group. 82% of holidaying visitors', 13% of business visitors' children in the first shoulder and 88% of holidaying and only 6% of business visitors' children in the second shoulder were in the 17 and over age group. In other words, parents of majority of children in all age groups, in particular in 17 and over age group, were holidaying visitors in both shoulders. Therefore, it can be said that both shoulder visitors with children aged 17 and over feel freer to visit Turkey for holiday/vacation purposes.

While majority of visitors' children were younger in Istanbul, 61% were aged 16 or below, most visitors' children were in the older age groups in Antalya, 58% were aged 17 and over. The major group among visitors in Istanbul were children aged 16 or less (38%) and 19% of them were in the sub-group of one child aged 21 and over. On the other hand, The superior group in Antalya were children aged 21 and over (34%) and 22% of them were in the sub-group of one child aged 12 or less. In other words, most visitors in Istanbul had one child aged 12 or less and most visitors in Antalya had one child 21 and over. The second major groups were children aged 21 and over for visitors to Istanbul (24%) and children aged 12 or less and children aged 17-20 for visitors to Antalya (24% each) (Table 4.76).

Table 4.76 "No of children in each age group" and main purpose of visit by survey place

	Istanbul										Antalya									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
1-12 or less	13	13.8	3	25	14	18.4	3	37.5	36	18.6	38	18.2	2	25.0	1	50	-	-	41	18.6
2-12 or less	10	10.6	1	8.33	19	25.0	-	-	30	15.5	8	3.83	-	-	1	50	-	-	9	4.09
3-12 or less	3	3.2	-	-	-	-	3	37.5	6	3.1	3	1.44	-	-	-	-	-	-	3	1.36
4-12 or less	1	1.1	-	-	-	-	-	-	1	0.5	-	-	-	-	-	-	-	-	-	-
Sub-Total	*27*	28.7	*4*	33.3	*33*	43.4	*6*	*75*	*73*	37.6	*49*	23.4	*2*	25.0	*2*	100	-	-	*53*	24.1
1-age 13-16	15	16.0	3	25	12	15.8	1	12.5	31	16.0	30	14.4	1	12.5	-	-	-	-	31	14.1
2-age 13-16	3	3.2	-	-	12	15.8	-	-	15	7.7	8	3.83	1	12.5	-	-	-	-	9	4.09
Sub-Total	*18*	19.1	*3*	25	*24*	31.6	*1*	12.5	*46*	23.7	*38*	18.2	*2*	25.0	-	-	-	-	*40*	18.2
1-age 17-20	13	13.8	1	8.33	8	10.5	-	-	22	11.3	37	17.7	1	12.5	-	-	-	-	38	17.3
2-age 17-20	4	4.3	-	-	2	2.6	-	-	6	3.1	15	7.18	-	-	-	-	-	-	15	6.82
Sub-Total	*17*	18.1	*1*	8.33	*10*	13.2	-	-	*28*	14.4	*52*	24.9	*1*	12.5	-	-	-	-	*53*	24.1
1-age 21+	25	26.6	3	25	6	7.9	1	12.5	36	18.6	46	22	2	25.0	-	-	-	-	48	21.8
2-age 21+	6	6.4	-	-	3	3.9	-	-	9	4.6	20	9.57	1	12.5	-	-	-	-	22	10
3-age 21+	1	1.1	1	8.33	-	-	-	-	2	1.0	4	1.91	-	-	-	-	-	-	4	1.82
Sub-Total	*32*	34.0	*4*	33.3	*9*	11.8	*1*	12.5	*47*	24.2	*70*	33.5	*3*	37.5	-	-	-	-	*74*	33.6
n	94	100	12	100	76	100	8	100	194	100	209	100	8	100	2	100	-	-	220	100
N	75	48.4	9	5.81	63	40.6	4	2.58	155	100	168	95.5	5	2.8	2	1.14	-	-	176	100
Avg.child	*1.25*		*1.33*		*1.21*		*2.0*		*1.25*		*1.24*		*1.6*		*1.0*		-		*1.25*	
	Case N 155 Response n 194 p= NA										Case N 176 Response n 220 p= NA									
** Columns for other ignorable purposes which had very small numbers are not placed in the table.																				

The holidaying visitors' children aged 17 and over were in the majority in all holidaying visitors with 52% and 58% respectively in Istanbul and Antalya and both survey place visitors in these age groups generally had only one child. In other words, most holidaying visitors had one child aged 17 and over in both survey places, particularly in Antalya. 75% of all business visitors' and 58% of all cultural visitors' children were aged 16 or less in Istanbul and most of them had only one child in this age group. The number of cultural and business visitors was ignorable in Antalya, however, 38% of cultural visitors' children were aged 21 and over.

Expectedly, the analysis of the Table 4.76 by rows indicated that holidaying visitors with children were overwhelmingly in majority in all age groups in Antalya. 92% to 98% of children in all age groups were holidaying visitors' children in Antalya and remaining only 2 to 8% were other visitors' children with different purpose of visit. 94% of children aged 16 or less and 96% of children aged 17 and over were holidaying visitors' children in Antalya. On the other hand, Istanbul indicated different results. While most children aged 16 or less (48%) were business visitors' children, majority of children aged 17 and over (65%) were holidaying visitors' children in Istanbul. Once again it was confirmed that visitors with children aged 17 and over feel free to visit Turkey for holiday/vacation purposes.

The main purpose of visit by companions

Table 4.77, 123 and 124 indicate significant differences in terms of visitors' companions' main purpose of visit. While 32% of British visitors were visiting Turkey alone, only 14% of German visitors were alone. German visitors preferred travelling with companions rather than travelling

alone. This could probably be explained by the travel purpose of alone visitors. While most alone British visitors' purpose of visit was business (69%), 51% of alone German visitors' purpose was holiday. Therefore, as anticipated, while most business visitors travel either alone or with their colleagues, holidaying visitors travel with their family members and friends and relatives.

Table 4.77 Companions and main purpose of visit by nation

	British Visitors										German Visitors									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Alone	15	11.6	-	-	50	64.9	7	50.0	73	32.0	61	8.7	3	7.7	47	72.3	4	50.0	119	14.4
HusWifeChi	5	3.9	-	-	-	-	1	7.1	6	2.6	33	4.7	-	-	-	-	-	-	33	4.0
Husb.-Wife	63	48.8	2	100	8	10.4	2	14.3	76	33.3	289	41.3	19	48.7	4	6.2	3	37.5	321	38.8
Children	2	1.6	-	-	1	1.3	1	7.1	5	2.2	19	2.7	-	-	2	3.1	-	-	21	2.5
Parents	4	3.1	-	-	-	-	2	14.3	7	3.1	31	4.4	1	2.6	-	-	-	-	32	3.9
Colleagues	3	2.3	-	-	16	20.8	-	-	19	8.3	23	3.3	4	10.3	6	9.2	-	-	37	4.5
Friend-Rel.	28	21.7	-	-	2	2.6	-	-	32	14.0	173	24.7	9	23.1	5	7.7	1	12.5	191	23.1
Boy/Girl Fr.	12	9.3	-	-	2	2.6	1	7.1	16	7.0	98	14.0	4	10.3	1	1.5	-	-	104	12.6
Tour group	-	-	-	-	-	-	-	-	-	-	4	0.6	1	2.6	-	-	-	-	5	0.6
NoneAbove	-	-	-	-	-	-	-	-	-	-	2	0.3	-	-	-	-	-	-	-	-
Total	129	100	2	100	77	100	14	100	228	100	700	100	39	100	65	100	8	100	827	100
	N 228 Response n 234 p= 0.000										N 827 Response n 863 p= 0.000									

** Columns for other ignorable purposes which had very small numbers are not placed in the table
*** British visitors in Antalya in the first and second shoulders are not computed because of lack of visitors in Antalya

Visitors travelling with their husband/wife, friends and relatives and partners (boy/girl friends) were the important companion groups among both British and German visitors. 33% of British and 39% of German visitors travelled to Turkey with their husband/wife. 83% of British and 90% of German visitors', who travelled with their husband/wife, travel purpose to Turkey was holiday/vacation. 14% of British and 23% of German visitors travelled with their friends and relatives and 7% of British and 13% of German visitors travelled to Turkey with their partners, boy/girl-friends. Overwhelming majority (75% to 94%) of all British and German visitors' purpose of visit, who travelled with either their friends and relatives or boy/girl-friends, was holiday vacation. As a matter of fact, except for alone British business visitors and British business visitors travelling with their colleagues, majority of all other British and German visitors' travel purpose, who either alone or with companion, was holiday/vacation.

As Table 4.78 indicates, while 36% of first shoulder visitors were visiting Turkey with his/her wife/husband, their share increased to 40% in the second shoulder. While most first shoulder visitors' purpose of visit travelling with his/her wife/husband was holiday/vacation (88%), it increased to 90% in the second shoulder. It is worth noting that except for alone visitors, all other visitors' purpose of visit travelling with companion was overwhelmingly holiday/vacation. The share of alone visitors remained almost same in both shoulders (18%). 55% in the first shoulder and 46% of alone visitors' main purpose of visit in the second shoulder was business. Once again, it was confirmed that while most business visitors travel either alone or with their colleagues, holidaying visitors travel with their family members and friends and relatives.

Table 4.78 Companions and main purpose of visit by shoulder season

	1st Shoulder										2nd Shoulder									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Alone	35	8.1	-	-	54	70.1	7	53.8	98	17.8	41	10.3	3	16.7	43	66.2	4	44.4	94	18.7
HusWifeChi	27	6.3	-	-	-	-	-	-	27	4.9	11	2.8	-	-	-	-	1	11.1	12	2.4
Husb.-Wife	173	40.1	13	56.5	7	9.1	2	15.4	197	35.8	179	45.0	8	44.4	5	7.7	3	33.3	200	39.7
Children	14	3.2	-	-	1	1.3	1	7.7	16	2.9	7	1.8	-	-	2	3.1	-	-	10	2.0
Parents	26	6.0	-	-	-	-	1	7.7	27	4.9	9	2.3	1	5.6	-	-	1	11.1	12	2.4
Colleagues	13	3.0	3	13.0	11	14.3	-	-	28	5.1	13	3.3	1	5.6	11	16.9	-	-	28	5.6
Friend-Rel.	113	26.2	4	17.4	4	5.2	1	7.7	123	22.3	88	22.1	5	27.8	3	4.6	-	-	100	19.8
Boy/Girl Fr.	47	10.9	3	13.0	1	1.3	1	7.7	53	9.6	63	15.8	1	5.6	2	3.1	-	-	67	13.3
Tour group	-	-	1	4.3	-	-	-	-	1	0.2	4	1.0	-	-	-	-	-	-	4	0.8
NoneAbove	2	0.5	-	-	-	-	-	-	2	0.4	-	-	-	-	-	-	-	-	-	-
Total	431	100	23	100	77	100	13	100	551	100	398	100	18	100	65	100	9	100	504	100
	N 551 Response n 572 p= NA										N 504 Response n 527 p= NA									

** Columns for other ignorable purposes which had very small numbers are not placed in the table.

Visitors travelling with their husband/wife, friends and relatives and partners (boy/girl friends) were the important companion groups in shoulders. 22% in first shoulder and 20% of second shoulder visitors travelled with their friends and relatives and 10% in first shoulder and 13% of second shoulder visitors travelled to Turkey with their partners, boy/girl-friends.

As indicated on Table 4.79 while 29% of visitors were visiting Istanbul alone, only 10% of visitors to Antalya were alone. Visitors to Antalya preferred travelling with companions rather than travelling alone. This was the result of the travel purpose of alone visitors. While most alone visitors' purpose of visit was business (73%) in Istanbul, 90% of alone visitors' purpose was holiday in Antalya. Consequently, third time it was confirmed that most business visitors travel either alone or with their colleagues, holidaying visitors travel with their family members and friends and relatives.

Table 4.79 Companions and main purpose of visit by survey place

	Istanbul										Antalya									
	Holiday		Culture		Busines		V.F.R.		Total		Holiday		Culture		Busines		V.F.R.		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
Alone	23	8.6	1	4.2	97	70.3	9	47.4	133	28.7	53	9.4	2	11.8	-	-	2	40.0	59	10.0
HusWifeChi	9	3.4	-	-	-	-	1	5.3	10	2.2	29	5.2	-	-	-	-	-	-	29	4.9
Husb.-Wife	115	43.2	12	50.0	11	8.0	5	26.3	147	31.7	237	42.1	9	52.9	1	33.3	-	-	250	42.2
Children	7	2.6	-	-	3	2.2	1	5.3	12	2.6	14	2.5	-	-	-	-	-	-	14	2.4
Parents	10	3.8	-	-	-	-	2	10.5	13	2.8	25	4.4	1	5.9	-	-	-	-	26	4.4
Colleagues	13	4.9	3	12.5	21	15.2	-	-	38	8.2	13	2.3	1	5.9	1	33.3	-	-	18	3.0
Friend-Rel.	70	26.3	9	37.5	5	3.6	-	-	89	19.2	131	23.3	-	-	2	66.7	1	20.0	134	22.6
Boy/Girl Fr.	22	8.3	-	-	3	2.2	1	5.3	28	6.0	88	15.6	4	23.5	-	-	-	-	92	15.5
Tour group	4	1.5	1	4.2	-	-	-	-	5	1.1	-	-	-	-	-	-	-	-	-	-
NoneAbove	1	0.4	-	-	-	-	-	-	1	0.2	1	0.2	-	-	-	-	-	-	1	0.2
Total	266	100	24	100	138	100	19	100	463	100	563	100	17	100	3	100	5	100	592	100
	N 463 Response n 476 p= NA										N 592 Response n 623 p= NA									

** Columns for other ignorable purposes which had very small numbers are not placed in the table.

As Table 4.79 indicates, while 32% of visitors were visiting Istanbul with his/her wife/husband, their share increased to 42% in Antalya. While most visitors' purpose of visit travelling with

his/her wife/husband was holiday/vacation (78%) in Istanbul, it increased to 97% in Antalya. It is worth noting that except for alone and visitors travelling with Colleagues in Istanbul, all other visitors' purpose of visit was considerably holiday/vacation.

Conclusions on visitors' purpose of visit

The results can be summarised as follows: In average

- 55% of British visitors and 60% of German visitors in both shoulders visit Istanbul for holiday/vacation purposes, and

- 35% of all British visitors and 25% of all German visitors visit Istanbul for business purposes in both shoulders.

- 7% of British visitors and 2% of German visitors chose Istanbul to visit their family, friends and relatives.

- 1% of the remaining 3% British visitors and 9% of the remaining 13% German visitors chose Istanbul for cultural purposes.

The remaining was distributed among all other purposes. It can be said that the share of visitors to Istanbul with different purposes in total are almost same in both shoulders. In other words there is a balance between shoulders in terms of distribution of purpose of visit.

On the other hand, in average

95% of German visitors visit Antalya for holiday/vacation, and

3% of all German visitors visit Antalya for cultural purposes in both shoulders.

The remaining 2% was distributed among business and V.F.R. purposes. It can be said that the share of visitors to Antalya with different purposes in total are almost same in both shoulders as well. In other words there is a balance between shoulders in terms of distribution of purpose of visit. In addition, it is worth noting that as high as 95% of all German visitors to Antalya prefer this province for holiday purposes and other purposes does not seem to be affective factor in choosing Antalya as a destination place. (Figure 4.7, 4.8, 4.9, 4.10 and Appendix 100, 101 and 102)

Figure 4.7 Demographic profile of holidaying British visitors by shoulder

(See also Appendix 100)

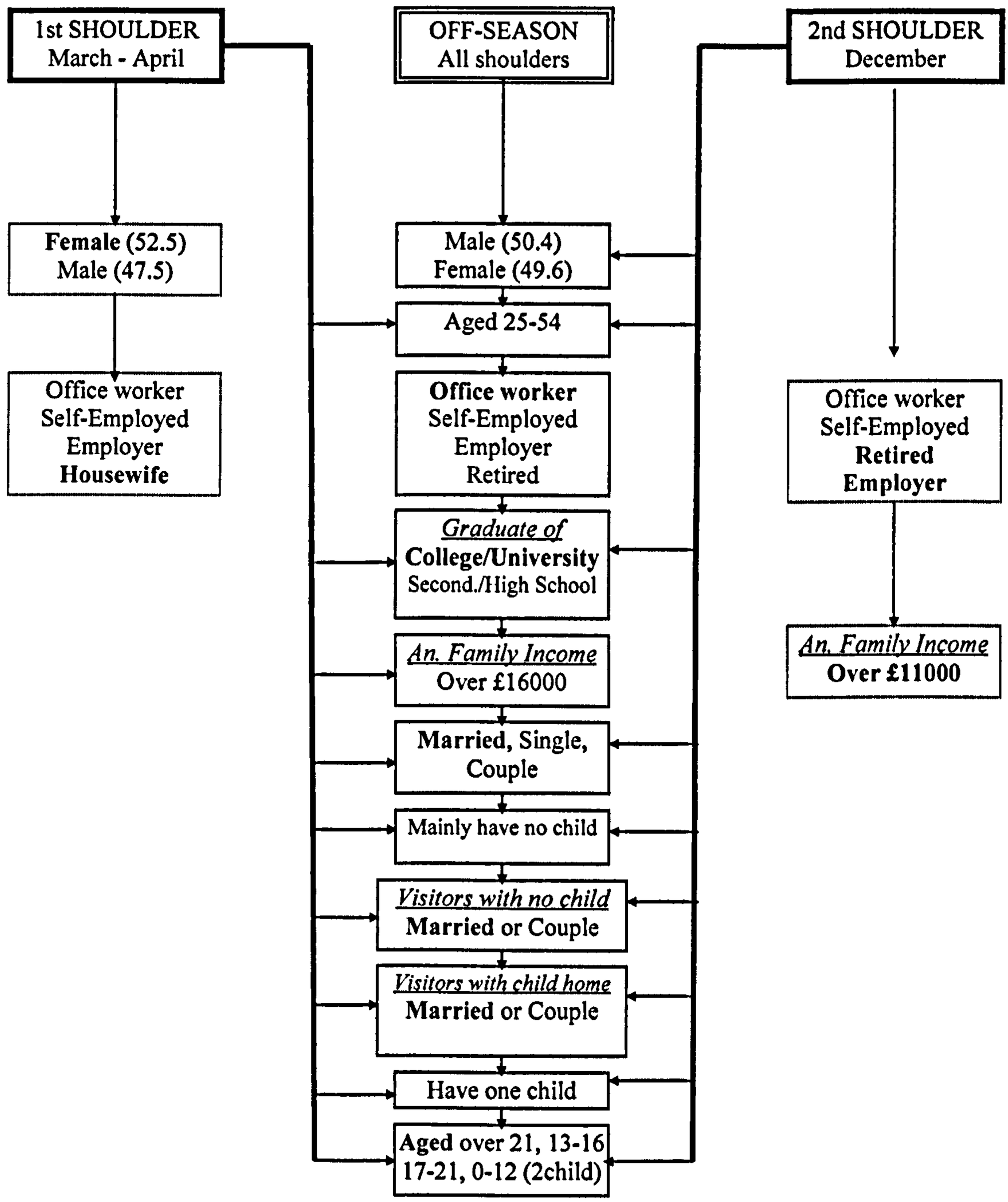


Figure 4.8 Demographic profile of holidaying German visitors by shoulder
(*See also Appendix 101*)

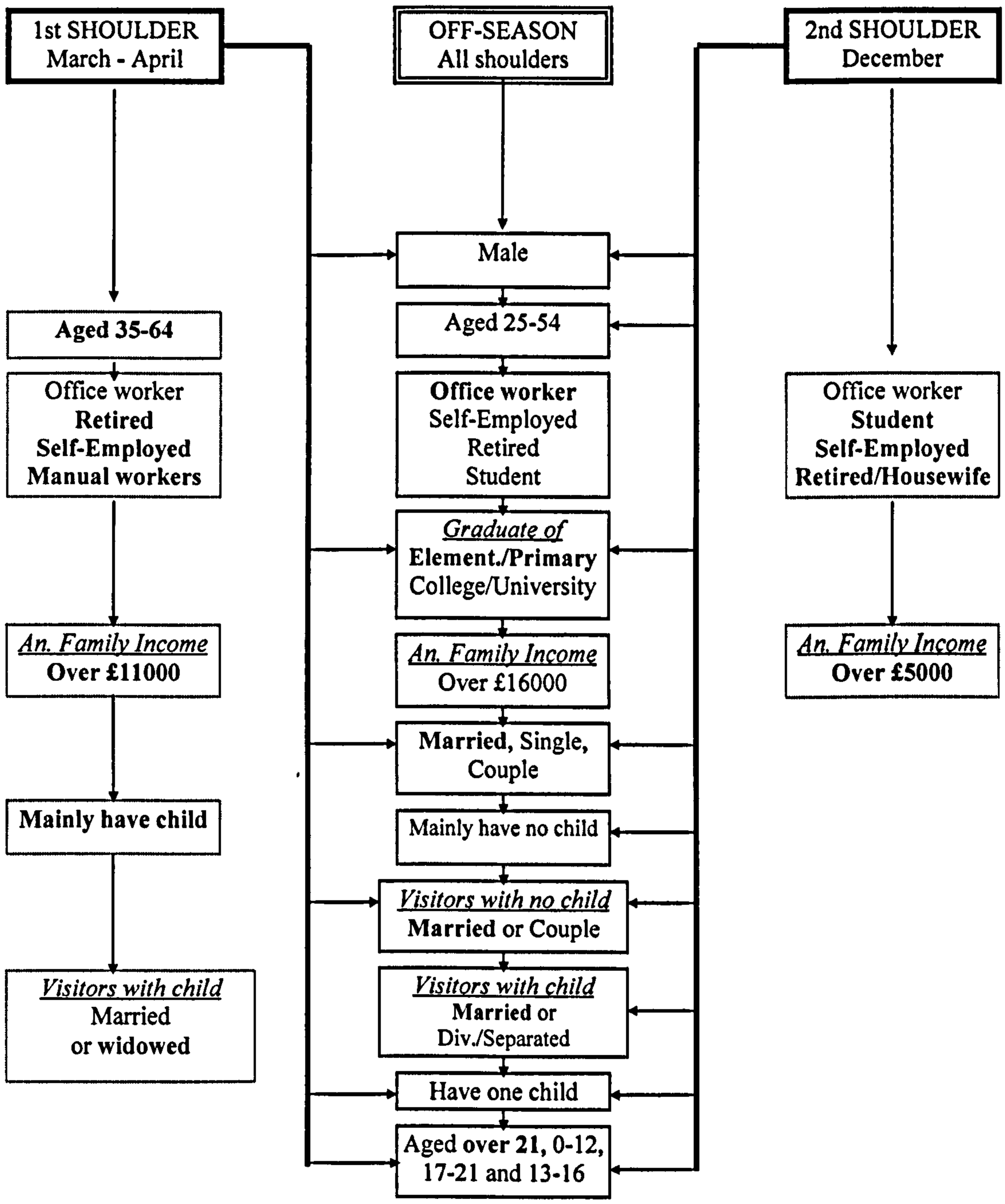


Figure 4.9 Demographic profile of British business visitors by shoulder
(*See also Appendix 102*)

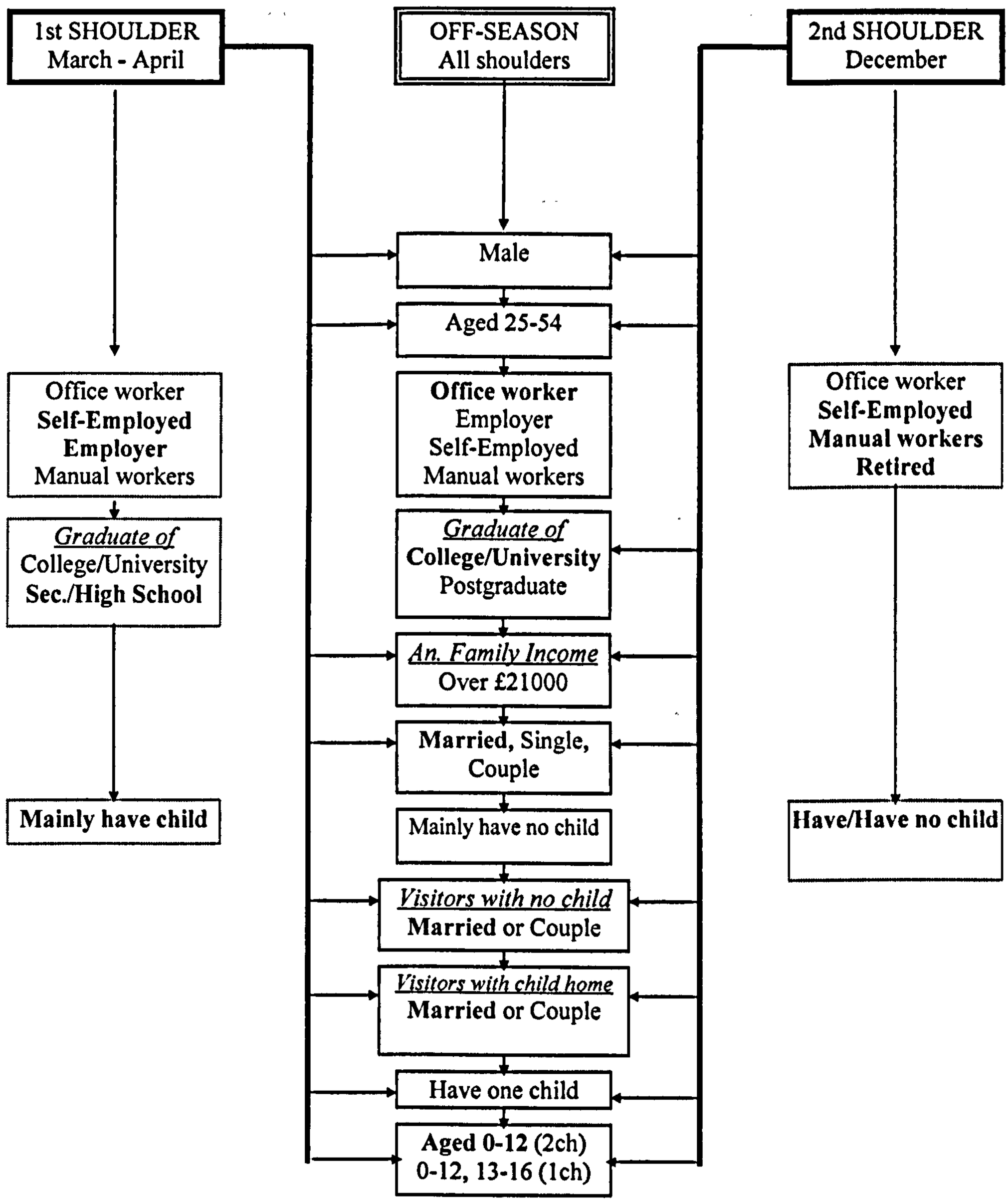
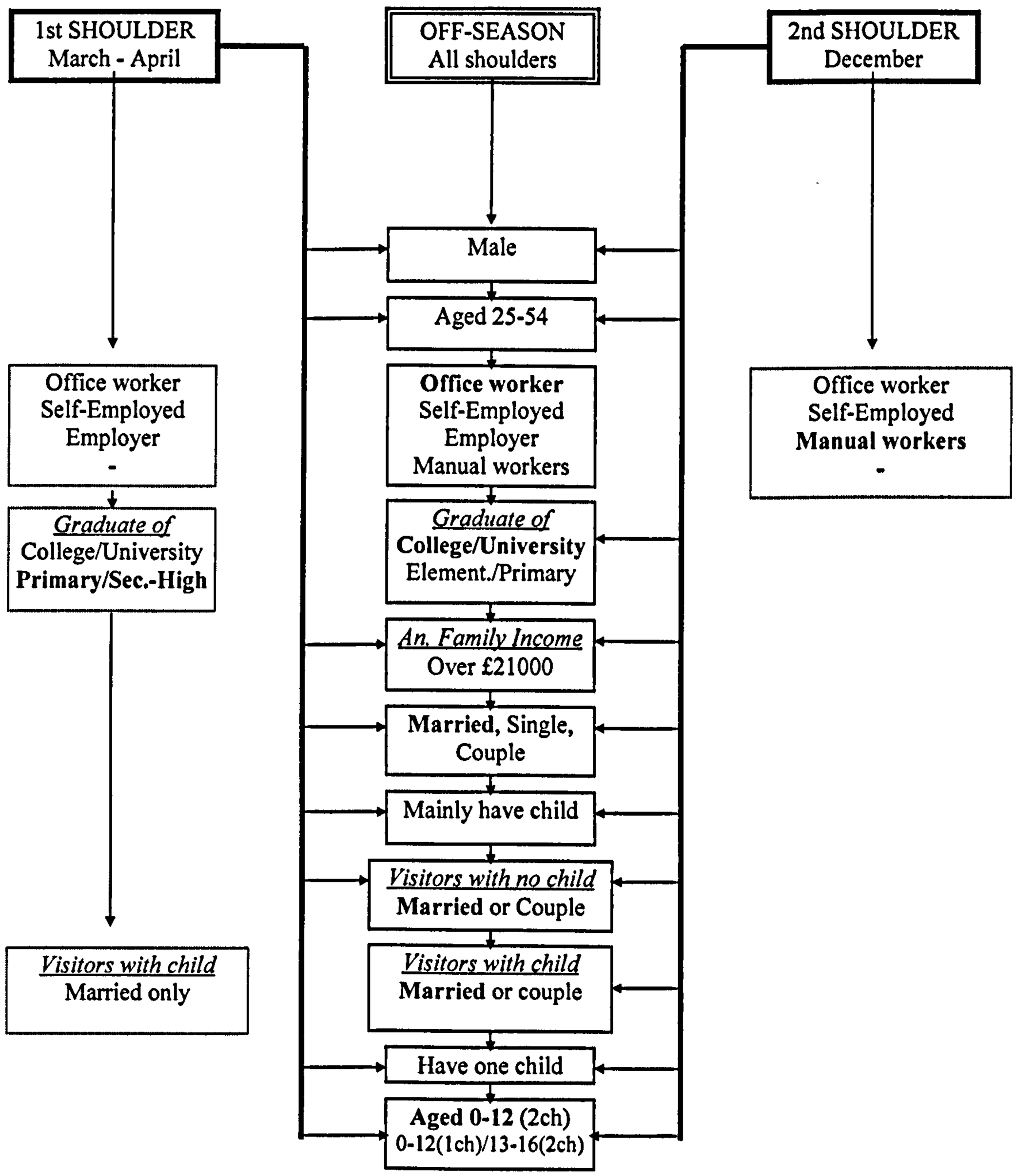


Figure 4.10 Demographic profile of German business visitors by shoulder
(*See also Appendix 102*)

OFF-SEASON **GERMAN BUSINESS** MARKET'S
DEMOGRAPHIC PROFILE



Attraction factors

Except for British visitors in first and second shoulders (p=0.069), attraction factors for all other visitors by nationality, shoulder season and survey place showed significant differences (p=0.000). It is interesting to see that 5% of visitors encouraged by their friends and relatives to visit Turkey and secondly, as low as only 3% of visitors stated that Sea-Sun-Sand attracted them to Turkey. Although the importance of Sea-Sun-Sand was not found as high as expected, climate and weather conditions played an important role in visiting Turkey. This situation signals that better climate and weather conditions is enough for visitors to visit historical, cultural, natural attractions, and to learn more about Turkey and Turkish people, and they do not necessarily need to benefit from Sea-Sun-Sand.

Table 4.80 Attraction factors by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Hist./Cult. Resour.	107	34.6	166	14.2	273	18.4
Turkey&Hospitality	8	2.6	110	9.4	118	8.0
Know Turkey&Peo.	12	3.9	202	17.3	214	14.5
Cheap Travel Cost	16	5.2	194	16.6	210	14.2
Shopping facilities	8	2.6	17	1.5	25	1.7
Busin./Conf./Meet.	41	13.3	47	4.0	88	5.9
Natural Variety	4	1.3	60	5.1	64	4.3
Pop./Diffr.destinat.	46	14.9	37	3.2	83	5.6
Climate/Weather	9	2.9	118	10.1	127	8.6
Recommendation	29	9.4	46	3.9	75	5.1
Promotion/Advert.	8	2.6	22	1.9	30	2.0
Prev. Trip/Experien.	7	2.3	25	2.1	32	2.2
Short Distance	3	1.0	4	0.3	7	0.5
Sea-Sun-Sand	1	0.3	46	3.9	47	3.2
Nothing Particular	-	-	40	3.4	40	2.7
None of Above	10	3.2	37	3.2	47	3.2
Total	n 309	100	n 1171	100	n 1480	100
	N 194		N 740		N 934	
	N 934 n=1480 p= 0.000 Missing:144					
	No of cases (visitors) No of responses (attraction factors)					

However, primary and secondary attraction factors indicated differences on the nationality base. While primary attraction factors for British visitors were ranked as historical/cultural resources, Turkey as popular, different and interesting destination, business and recommendation, it was ranked for German visitors as interest to know about Turkey and Turkish people, cheap/reasonable travel and holiday cost, historical/cultural visitors and climate and weather conditions. As numbers indicate on Table 4.80, travel and holiday cost, interest to know about Turkey and its people, and better climatic and weather conditions were secondary attraction factors for British visitors whereas they were primary factors for German visitors. In other words, orders of attraction factors were almost completely different between the two nations. Turkish hospitality and Turkey itself, rich

natural resources, business, recommendation and Sea-Sun-Sand were secondary attraction factors for German visitors.

Table 4.81 Attraction factors and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Hist./Cult. Resour.	38	29.5	69	38.3	112	16.9	54	10.6	150	19.0	123	17.9
Turkey&Hospitality	2	1.6	6	3.3	51	7.7	59	11.6	53	6.7	65	9.4
Know Turkey&Peo.	8	6.2	4	2.2	107	16.2	95	18.7	115	14.5	99	14.4
Cheap Travel Cost	4	3.1	12	6.7	88	13.3	106	20.8	92	11.6	118	17.1
Shopping facilities	3	2.3	5	2.8	5	0.8	12	2.4	8	1.0	17	2.5
Busin./Conf./Meet.	18	14.0	23	12.8	29	4.4	18	3.5	47	5.9	41	6.0
Natural Variety	2	1.6	2	1.1	42	6.3	18	3.5	44	5.6	20	2.9
Pop./Diffr.destinat.	23	17.8	23	12.8	26	3.9	11	2.2	49	6.2	34	4.9
Climate/Weather	3	2.3	6	3.3	58	8.8	60	11.8	61	7.7	66	9.6
Recommendation	14	10.9	15	8.3	26	3.9	20	3.9	40	5.1	35	5.1
Promotion/Advert.	5	3.9	3	1.7	12	1.8	10	2.0	17	2.1	13	1.9
Prev. Trip/Experien.	3	2.3	4	2.2	13	2.0	12	2.4	16	2.0	16	2.3
Short Distance	1	0.8	2	1.1	3	0.5	1	0.2	4	0.5	3	0.4
Sea-Sun-Sand	-	-	1	0.6	31	4.7	15	2.9	31	3.9	16	2.3
Nothing Particular	5	3.9	5	2.8	35	5.3	5	1.0	35	4.4	5	0.7
None of Above	5	3.9	5	2.8	24	3.6	13	2.6	29	3.7	18	2.6
Total	129	100	180	100	662	100	509	100	791	100	689	100
	N 86		N 108		N 415		N 325		N 501		N 433	
	N 194 p=0.069 n 309				N 740 p=0.000 n 1171				N 934 p=0.000 n 1480			
	No of cases (visitors) No of responses (attraction factors)											

Table 4.81 identified that differences existed between two shoulders in terms of attraction factors for all visitors. Primary factors for the first shoulder were identified as historical/cultural resources, interest to know about Turkey and Turkish people, cheap/reasonable travel/holiday cost, climate/weather conditions and Turkish hospitality and Turkey herself. Although, first, fourth and fifth primary attractions kept their ranks same as in the first shoulder, financial and cost considerations came on to front and interest to know about Turkey were put back in the second shoulder which was most probably the result of irresistible price dumping to keep full airline seats and bed capacity. This kind of low price tariffs are less seen in the first shoulder which is just before the main peak season in Turkey.

No changes were observed in the ranking of primary attraction factors for British visitors between shoulders. Historical/cultural attractions, Turkey as new, popular and different destination, business and friends and family recommendation were primary attractions for British visitors. The primary attractions for German visitors were almost completely different than for British visitors. German visitors' primary attraction ranking also indicated important changes between shoulders. While historical/cultural, interest to know about Turkey and its people, cheap travel/holiday cost and climate/weather were respectively stated as primary attractions in the first shoulder, cheap travel/holiday cost and climate indicated more importance for German visitors in the second shoulder. As mentioned above lower prices, sometimes as low as DM99 which equals to roughly

£40 transportation + bed prices in the second shoulder is the main reason for why cheap travel/holiday cost becomes the first primary attraction factor for German visitors.

Table 4.82 Attraction factors and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Hist./Cult. Resour.	107	35.7	-	-	75	25.9	91	10.3	182	30.8	91	10.2
Turkey&Hospitality	6	2.0	2	22.2	13	4.5	97	11.0	19	3.2	99	11.1
Know Turkey&Peo.	12	4.0	-	-	50	17.2	152	17.3	62	10.5	152	17.1
Cheap Travel Cost	15	5.0	1	11.1	22	7.6	172	19.5	37	6.3	173	19.4
Shopping facilities	8	2.7	-	-	9	3.1	8	0.9	17	2.9	8	0.9
Busin./Conf./Meet.	41	13.7	-	-	45	15.5	2	0.2	86	14.6	2	0.2
Natural Variety	3	1.0	1	11.1	11	3.8	49	5.6	14	2.4	50	5.6
Pop./Diffr.destinat.	45	15.0	1	11.1	9	3.1	28	3.2	54	9.2	29	3.3
Climate/Weather	6	2.0	3	33.3	7	2.4	111	12.6	13	2.2	114	12.8
Recommendation	28	9.3	1	11.1	18	6.2	28	3.2	46	7.8	29	3.3
Promotion/Advert.	8	2.7	-	-	8	2.8	14	1.6	16	2.7	14	1.6
Prev. Trip/Experien.	7	2.3	-	-	3	1.0	22	2.5	10	1.7.	22	2.5
Short Distance	3	1.0	-	-	-	-	4	0.5	3	0.5	4	0.4
Sea-Sun-Sand	1	0.3	-	-	3	1.0	43	4.9	4	0.7	43	4.8
Nothing Particular	-	-	-	-	3	1.0	37	4.2	3	0.5	37	4.2
None of Above	10	3.3	-	-	14	4.8	23	2.6	24	4.1	23	2.6
Total	300	100	9	100	290	100	881	100	590	100	890	100
	N 190		N 4		N 196		N 544		N 386		N 548	
	N 194 p=0.000 n 309				N 740 p=0.000 n 1171				N 934 p=0.000 n 1480			
	No of cases (visitors) No of responses (attraction factors)											

When secondary attractions ranked, cheapness also gained importance for British visitors as well in the second shoulder. Therefore, it can be said that in general, price reductions play an important role in attracting visitors to Turkey in the second shoulder. The climate/weather factor, also shows importance in the second shoulder. Suitable climate/weather together with low prices attracts visitors to Turkey. While promotion and advertising activities and attractive shopping facilities and opportunities in Turkey placed in British visitors secondary attraction factors, natural resources and Sea-Sun-Sand particularly in the first shoulder were secondary attractions for German visitors. In this respect, one can say that great differences exist between British and German tourist markets in terms of attraction factors. It is also important that, British market indicates a more stable primary attraction factors while German market indicate differences between shoulders. Therefore, instead of employing standard sales, promotion, advertising tactics for both markets and in both shoulders, differences should be considered even in each market itself and different marketing strategies should be followed for each market and for different seasons.

Primary attraction factors were rather different in Istanbul and Antalya. While visitors preferring Istanbul generally for cultural, business and popularity reasons, Antalya was chosen for cheap travel/holiday cost and climate/weather in particular and cultural and natural reasons (Table 4.82).

Similarities were observed between British and German visitors to Istanbul in terms of their primary attractions. Istanbul was chosen by considering primarily historical/cultural resources, business, reasonable travel/holiday cost and recommendation. Turkey as new popular, interesting destination for British visitors and Interest to know more about Turkey and Turkish people for German visitors were added to primary attraction factors in Istanbul as only difference between two nations. As secondary factors, shopping facilities in Istanbul and promotion activities were effective in attracting visitors to Istanbul. As noticed, climatic and weather conditions did not indicate significant importance as primary and secondary attraction factor in Istanbul.

Visitors to Antalya where more than 99% of respondents were German indicated significant differences compared to visitors to Istanbul. Primary attraction factors for Antalya were cheap travel/holiday cost, interest to know Turkey and its people, climate/weather, traditional Turkish hospitality and historical/cultural resources. The cost factor together with climate/weather factor was very effective in Antalya. The low prices and attractive mild weather and rich natural, and cultural resources in Antalya provided German visitors who interested in learning and experiencing more about Turkey, Turkish people and hospitality and variety of historical/cultural and natural resources an appealing opportunity which can not be missed.

Influential factors on timing of travel

Influential factors also indicated significant differences (Table 4.83, 129, 130). It was identified that although 22% of overall visitors declared weather conditions and climate as primary influential factor on date of travel, almost same proportion of visitors, 21%, stated that no particular factor or reason influenced their choice of travel timing. In other words, 21% of visitors could be attracted to Turkey at any time of year by carefully designed promotion activities. On the other hand, while 13% of visitors attracted by special and cheap holiday offers, last-minute prices, 8%'s travel timing affected by their or their partner's job. Total of 20% of visitors either considered only present time or preferred that time for their travel. The share of visitors who influenced by the timing of their children's school holidays was rather small (Table 4.83). Despite 43% of overall visitors did have children home living with them and schools were open when they were in Turkey, only 4% of them indicated that they were affected by timing of school holidays when they were deciding on the date of travel.

Influential factors on timing of travel indicated significant differences between British and German visitors. While British visitors' own or partner's job and their business, timing of conference, congress and exhibition in Turkey affected mainly their travel time, weather and climate conditions, special, cheap, bargain and last-minute holiday offers were primary influential factors on travel date of German visitors. In short, primary influential factors were business and employment related for British visitors, climate and weather and cost of travel related for German visitors. It is thought that a relationship exists between statements of cheap, bargain travel offers

and considered this time only. In other words, excluding visitors who considered only that time without any other factors involved, when visitors found a special bargain holiday offer which suits their budget, they did not want to miss that opportunity and considered only that time for their travel. This was more obvious among German visitors and close percentages of considered this time only and special, cheap offer in total. Special bargain offers just before and after main tourism season played an important role in both nationalities' decision on date of travel. The share of British and German visitors who preferred that time for their travel was around 9% in total. These visitors who prefer this time of year, shoulders, to travel to Turkey and visitors who stated that no particular factor influenced them may be potential repeat visitors in coming years depending on their positively affected travel experience in Turkey.

Table 4.83 Influential factors on date of travel by nationality

	British		German		Total	
	n	%	*n*	%	*n*	%
Weather Conditions	13	5.3	294	26.0	307	22.3
My/Partner's job	57	23.1	52	4.6	109	7.9
Children's School	5	2.0	43	3.8	48	3.5
Consider This Time	11	4.5	135	11.9	146	10.6
Prefer This Time	22	8.9	112	9.9	134	9.7
B'day/Anniv/Wed.	13	5.3	1	0.1	14	1.0
Busin./Conf./Exhib	56	22.7	32	2.8	88	6.4
Special/Cheapoffer	24	9.7	152	13.5	176	12.8
Fri-Relat. inTurkey	6	2.4	11	1.0	17	1.2
Recom/Experience	-	-	17	1.5	17	1.2
Nothing Particular	38	15.4	251	22.2	289	21.0
None of above	2	0.8	30	2.7	32	2.3
Total	n 247	100	n 1130	100	n 1377	100
	N 216		N 798		N 1014	
	Case N 1014 Responses n 1377 p= 0.000					

Table 4.84 Influential factors on date of travel and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Weather Conditions	6	5.8	7	4.9	152	26.9	142	25.2	158	23.6	149	21.0
My/Partner's job	35	34.0	22	15.3	30	5.3	22	3.9	65	9.7	44	6.2
Children's School	2	1.9	3	2.1	37	6.5	6	1.1	39	5.8	9	1.3
Consider This Time	5	4.9	6	4.2	81	14.3	54	9.6	86	12.9	60	8.5
Prefer This Time	10	9.7	12	8.3	73	12.9	39	6.9	83	12.4	51	7.2
B'day/Anniv/Wed.	5	4.9	8	5.6	1	0.2	-	-	6	0.9	8	1.1
Busin./Conf./Exhib	19	18.4	37	25.7	14	2.5	18	3.2	33	4.9	55	7.8
Special/Cheapoffer	3	2.9	21	14.6	27	4.8	125	22.2	30	4.5	146	20.6
Fri-Relat. inTurkey	3	2.9	3	2.1	9	1.6	2	0.4	12	1.8	5	0.7
Recom/Experience	-	-	-	-	8	1.4	9	1.6	8	1.2	9	1.3
Nothing Particular	14	13.6	24	16.7	113	20.0	138	24.5	127	19.0	162	22.9
None of above	1	1.0	1	0.7	21	3.7	9	1.6	22	3.3	10	1.4
Total	103	100	144	100	566	100	564	100	669	100	708	100
	N 95		N 121		N 426		N 372		N 521		N 493	
	N 216 p=0.044 n 247				N 798 p=0.000 n 1130				N 1014 p=0.000 n 1377			
	No of cases (visitors) No of responses											

As a consequence, it can be said that around 54% of British visitors were mainly affected by influential factors which were not in control of the visitors such as their own or partner's job and timing of business, exhibition and conferences. On the other hand, most of the primary influential factors which affected 60% of German visitors' time of travel were factors under visitors' control (initiative) such as preferring and considering that time and cost of travel.

Influential factors indicated differences between shoulders (Table 4.84). Weather, considering only and preferring first shoulder, job and children's school were important factors influencing overall visitors in the first shoulder, in March-April. Visitors who were offered special bargain offers and timing of business came in to front in the second shoulder in addition to primary influential factors on date of travel in the first shoulder. The degree of influence of weather, children's school and own or partner's job declined in the second shoulder. In addition, figures indicates that more visitors preferred and considered first shoulder only as time of travel to Turkey compared to second shoulder. The share of special bargain offers increased from 5% in the first shoulder to 21% in the second shoulder which indicates the importance of price reductions and special offers in the second shoulder. There was an increase in the share of visitors who stated no particular factor influenced their decision in choosing second shoulder as travel time. In summary, against 53% of overall visitors who were mainly affected by influential factors which were mostly in their control in the first shoulder, 62% of overall visitors indicated that most of the primary influential factors on time of travel were under their control (initiative). Specifically visitors in second shoulder were more free to travel at that time than visitors in the first shoulder.

The influential factors which affected British and German visitors' decision showed significant changes between shoulders. Visitors' own or partner's job and timing of business, conference, exhibition in Turkey alone played a significant role in British visitors' decision in the first shoulder. However, importance of own or partner's job reduced more than half in the second shoulder and influence of timing of business, conference, exhibition and cheap, bargain travel offers increased. This indicates that even same tourist market could show different characteristics and reactions within itself in different shoulders of year. On the other hand, most effective factors for German visitors in the first shoulder were weather, climate, considering only and preferring first shoulder. in contrast to significant decreases which were seen in the share of children's school, considering only and preferring second shoulder, degree of influence of special bargain offers indicated a large increase from 5% to 22% in the second shoulder. Special bargain travel offers played an important role in both nationalities' decision on travel time in the second shoulder which proved the importance and effects of price manipulation and damping in the market place.

It can be said that around while 61% of British visitors were primarily affected by influential factors which were not in control of them in the first shoulder, it decreased by about 13% and the degree of influence of factors which were under visitors' control increased in the second shoulder. In other words, British visitors were affected less in the second shoulder from factors which were

not under their control and were more free to travel to Turkey in the second shoulder. On the other hand, the same comment was applicable to German visitors, but the percentage of visitors who were affected by factors under their control was higher in both shoulders compared to British visitors. While most of the primary influential factors which affected 55% of German visitors' time of travel in the first shoulder were factors under visitors' control, it increased by about 10% in the second shoulder. To generalize, overall visitors were not affected by factors which were not in their control in the second shoulder as much as visitors in the first shoulder and 53% in the first shoulder and 62% of visitors in the second shoulder were available and ready to travel in the second shoulder. These visitors were ready to be activated to travel by suitable and appropriate means such as special holiday offers promotion activities.

The factors influenced differently visitors' decision in Istanbul and Antalya (Table 4.85). Visitor who were not affected by any particular factor, visitors who stated that own or partner's job, timing of business in Turkey and visitors who preferred or considered only shoulder seasons were in majority in Istanbul. Visitors in Antalya exhibited almost completely different picture. Visitors who were influenced by particularly weather conditions and special bargain offers in deciding the date of travel increased significantly in Antalya compared to visitors in Istanbul. On the other hand, significant decreases were seen in the degree of influence of own or partner's job, and timing of business in Antalya in comparison with Istanbul.

As Istanbul is a centre for business, an old cultural city and the length of stay shorter compared to Antalya, primary influential factors on timing of travel were generally business, job related and visitors considered only shoulder seasons depending on their job or business. In contrast, since Antalya is known as Turkish Riviera and holiday centre, and length of stay higher, most visitors naturally desired spending their holiday in better weather conditions and staying longer and paying less, weather conditions and special bargain holiday offers played the key roles influencing visitors decision to take their holiday in shoulder seasons (Table 4.85). In summary, influence of weather, children's school and special bargain travel offers were greater in Antalya, while own or partner's job, timing of business, conference, exhibition were effective in Istanbul in deciding the time of travel to Turkey. 54% in Istanbul and 60% of overall visitors in Antalya were affected by influential factors which were mostly in their control such as special bargain travel offers, considering or preferring particular season for travel. In other words, visitors to Antalya who were German visitors were more free to travel in shoulders than visitors Istanbul.

The factors which affected British and German visitors' decision showed significant differences between Istanbul and Antalya. Visitors' own or partner's job and timing of business, conference, exhibition in Turkey played a significant role in British visitors' decision in Istanbul. However, these factors were not important for German visitors in Istanbul as much as British visitor. Instead, the share of German visitors who had considered only that time in shoulder seasons and who were not affected by any particular factor were higher in Istanbul in consideration with British visitors.

As Antalya was visited overwhelmingly by German visitors, the results were same as the results for overall visitors in Antalya which was evaluated above. The (Table 4.85) indicates that tourist markets are affected by different factors in different destinations. In other words, influential factors on date of travel have changed according to the features and characteristics of destination and the purpose of visitors' visit.

Table 4.85 Influential factors on date of travel and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Weather Conditions	11	4.6	2	33.3	13	4.9	281	32.6	24	4.7	283	32.6
My/Partner's job	57	23.7	-	-	36	13.4	16	1.9	93	18.3	16	1.8
Children's School	5	2.1	-	-	3	1.1	40	4.6	8	1.6	40	4.6
Consider This Time	11	4.6	-	-	56	20.9	79	9.2	67	13.2	79	9.1
Prefer This Time	21	8.7	1	16.7	12	4.5	100	11.6	33	6.5	101	11.6
B'day/Anniv/Wed.	13	5.4	-	-	-	-	1	0.1	13	2.6	1	0.1
Busin./Conf./Exhib	56	23.2	-	-	32	11.9	-	-	88	17.3	-	-
Special/Cheapoffer	23	9.5	1	16.7	21	7.8	131	15.2	44	8.6	132	15.2
Fri-Relat. inTurkey	6	2.5	-	-	5	1.9	6	0.7	11	2.2	6	0.7
Recom/Experience	-	-	-	-	6	2.2	11	1.3	6	1.2	11	1.3
Nothing Particular	36	14.9	2	33.3	62	23.1	189	21.9	98	19.3	191	22.0
None of above	2	0.8	-	-	22	8.2	8	0.9	24	4.7	8	0.9
Total	241	100	6	100	268	100	862	100	509	100	868	100
	N 212		N 4		N 225		N 573		N 437		N 577	
	N 216 p=0.051 n 247				N 798 p=0.000 n 1130				N 1014 p=0.000 n 1377			
	No of cases (visitors) No of responses											

It can be said that around while only 45.6% of British visitors were primarily affected by influential factors which were in their control in Istanbul, the percentage of German visitors affected by these factors were higher and around 60% in Istanbul as well as in Antalya. Greater importance and attention should be paid to these visitors who could easily be attracted to Turkey at times out of main peak season and ready to be activated to travel by suitable and appropriate means such as special holiday offers promotion activities.

Information sources used

Except for British visitors, German visitors indicated great differences in terms of information sources used by shoulder and survey place. While the power of travel agencies was felt highly as information sources, significant number of visitors got information on Turkey from their friends, relatives and neighbours, and different forms of media such as television and newspaper. Around 83% of overall visitor used only those three means to get information about Turkey. Function of Turkish information offices abroad, transport companies, tourism fairs and exhibitions as information sources were very limited. Affect of travel agencies, recommendation were superior among German visitors, while British visitors used transport companies and Turkish Information Offices abroad more than German visitors as information sources. However, the primary

information sources were travel agencies, friends and relatives, their recommendation and various media resources for both nations (Table 4.86).

Table 4.86 Information sources used by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Travel agencies	109	42.6	545	47.9	654	46.9
Transport company	11	4.3	7	0.6	18	1.3
Tv/radio/paper/...	45	17.6	186	16.3	231	16.6
Turkish info. office	18	7.0	52	4.6	70	5.0
Tourism fairs-exh.	-	-	12	1.1	12	.9
Recommendation	40	15.6	228	20.0	268	19.2
Experience	6	2.3	13	1.1	19	1.4
Comp. Travel Dept.	2	0.8	2	0.2	4	.3
Book/Guidebook	11	4.3	65	5.7	76	5.5
None	5	2.0	19	1.7	24	1.7
None of above	9	3.5	9	0.8	18	1.3
Total	n 256	100	n 1138	100	n 1394	100
	N 200		N 780		N 980	
	Case N 980 Responses n 1394 p= 0.000					

Information sources used by overall, British and German visitors indicated small differences between shoulders. Travel agencies and media resources indicated some increase in importance of their role as information suppliers to travellers in the second shoulder. Other resources were superior in the first shoulder compared to second shoulder. However, mostly used information resources by overall visitors as well as British and German visitors were travel agencies, recommendation and media resources in both shoulders (Table 4.87).

Table 4.87 Information sources used and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Travel agencies	55	42.3	54	42.9	301	46.8	244	49.3	356	46.1	298	48.0
Transport company	8	6.2	3	2.4	4	0.6	3	0.6	12	1.6	6	1.0
Tv/radio/paper/...	18	13.8	27	21.4	95	14.8	91	18.4	113	14.6	118	19.0
Turkish info. office	13	10.0	5	4.0	30	4.7	22	4.4	43	5.6	27	4.3
Tourism fairs-exh.	-	-	-	-	9	1.4	3	0.6	9	1.2	3	0.5
Recommendation	22	16.9	18	14.3	139	21.6	89	18.0	161	20.8	107	17.2
Experience	3	2.3	3	2.4	8	1.2	5	1.0	11	1.4	8	1.3
Comp. Travel Dept.	1	0.8	1	0.8	-	-	2	0.4	1	0.1	3	0.5
Book/Guidebook	3	2.3	8	6.3	46	7.2	19	3.8	49	6.3	27	4.3
None	2	1.5	3	2.4	4	0.6	15	3.0	6	0.8	18	2.9
None of above	5	3.8	4	3.2	7	1.1	2	0.4	12	1.6	6	1.0
Total	130	100	126	100	643	100	495	100	773	100	621	100
	N 93		N 107		N 423		N 357		N 516		N 464	
	N 200 p=0.281 n 256				N 780 p=0.000 n 1138				N 980 p=0.001 n 1394			
	No of cases (visitors) No of responses											

Travel agencies and recommendation were slightly more important for German visitors than British visitors who used transport companies, media, Turkish Information Offices and experience more as substantial information resources compared to German visitors. While the share of Turkish Information Offices abroad, recommendation and transport companies were higher in the first shoulder, travel agencies, media, books and guide books were popular information sources for British visitors in the second shoulder. On the other hand, favourite information resources for German visitors were Turkish Information Offices, tourism fairs, recommendation, experience, books and guide books in the first shoulder and travel agencies and media resources in the second shoulder.

Table 4.88 Information sources used and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Travel agencies	109	43.1	-	-	130	42.6	415	49.8	239	42.8	415	49.6
Transport company	11	4.3	-	-	3	1.0	4	0.5	14	2.5	4	0.5
Tv/radio/paper/...	44	17.4	1	33.3	47	15.4	139	16.7	91	16.3	140	16.7
Turkish info. office	18	7.1	-	-	19	6.2	33	4.0	37	6.6	33	3.9
Tourism fairs-exh.	-	-	-	-	4	1.3	8	1.0	4	0.7	8	1.0
Recommendation	39	15.4	1	33.3	63	20.7	165	19.8	102	18.3	166	19.9
Experience	5	2.0	1	33.3	3	1.0	10	1.2	8	1.4	11	1.3
Comp. Travel Dept.	2	0.8	-	-	2	0.7	-	-	4	0.7	-	-
Book/Guidebook	11	4.3	-	-	19	6.2	46	5.5	30	5.4	46	5.5
None	5	2.0	-	-	8	2.6	11	1.3	13	2.3	11	1.3
None of above	9	3.6	-	-	7	2.3	2	0.2	16	2.9	2	0.2
Total	253	100	3	100	305	100	833	100	558	100	836	100
	N 197		N 3		N 219		N 561		N 416		N 564	
	N 200 p=0.070 n 256				N 780 p=0.000 n 1138				N 980 p=0.000 n 1394			
	No of cases (visitors) No of responses											

The overall visitors' information sources were almost same in Istanbul and Antalya. Depending on the visitor profile of the destination, information sources indicated less or more importance for visitors in that destination. For example, since visitors were only German in Antalya and whose primary purpose of visit holiday/vacation and cultural, and 87% of them organised their travel by travel agencies, travel agencies, media and recommendation were essential information sources for German visitors. On the other hand, in addition to those sources of information in Antalya, transport companies, Turkish Information Offices came into front as Istanbul was visited by British and German visitors and visitors' purpose of visit varied from holiday and business to visiting friends and relatives. In short, although travel agencies were more important in Antalya, the main information sources were same in both locations; travel agencies, recommendation and media resources (Table 4.88).

Conclusions

Attraction factors in choosing Turkey as a destination differs from rich historical, cultural natural resources, climate and weather to curiosity, interest and attractive promotion activities. While most primary attraction factors were found as rich and variety of historical and cultural resources, interest to know about Turkey and its people, cheap or reasonable travel and holiday cost, suitable climate and weather conditions in Turkey compared to visitors' country and finally traditional Turkish hospitality and Turkey itself, secondary attraction factors were stated as business, conference and meeting activities, Turkey as new, popular, different and interesting destination, recommendation by friends and relatives and variety of natural resources.

Great differences exist between British and German tourist markets in terms of attraction factors. It is also important that, British market indicates a more stable primary attraction factors while German market indicate differences between shoulders. Therefore, instead of employing standard sales, promotion, advertising tactics for both markets and in both shoulders, differences should be considered even in each market itself and different marketing strategies should be followed for each market and for different seasons.

Similarities were observed between British and German visitors to Istanbul in terms of their primary attractions. Istanbul was chosen by considering primarily historical/cultural resources, business, reasonable travel/holiday cost and recommendation. Turkey as new popular, interesting destination for British visitors and Interest to know more about Turkey and Turkish people for German visitors were added to primary attraction factors in Istanbul as only difference between two nations.

Visitors to Antalya where more than 99% of respondents were German indicated significant differences compared to visitors to Istanbul. Primary attraction factors for Antalya were cheap travel/holiday cost, interest to know Turkey and its people, climate/weather, traditional Turkish hospitality and historical/cultural resources. The cost factor together with climate/weather factor was very effective in Antalya.

On the other hand, primary influential factors were business and employment related for British visitors, climate and weather and cost of travel related for German visitors. It is thought that a relationship exists between statements of cheap, bargain travel offers and considered this time only. In other words, excluding visitors who considered only that time without any other factors involved, when visitors found a special bargain holiday offer which suits their budget, they did not want to miss that opportunity and considered only that time for their travel. This was more obvious among German visitors and close percentages of considered this time only and special, cheap offer in total. Special bargain offers just before and after main tourism season played an important role in both nationalities' decision on date of travel. The visitors who prefer this time of year, shoulders, to

travel to Turkey and visitors who stated that no particular factor influenced them may be potential repeat visitors in coming years depending on their positively affected travel experience in Turkey

The influence of weather, children's school and special bargain travel offers were greater in Antalya, while own or partner's job, timing of business, conference, exhibition were effective in Istanbul in deciding the time of travel to Turkey. More then half of overall visitors in Antalya were affected by influential factors which were mostly in their control such as special bargain travel offers, considering or preferring particular season for travel. In other words, visitors to Antalya who were German visitors were more free to travel in shoulders than visitors Istanbul.

While the power of travel agencies was felt highly as information sources, significant number of visitors got information on Turkey from their friends, relatives and neighbours, and different forms of media such as television and newspaper. Around 83% of overall visitor used only those three means to get information about Turkey. Function of Turkish information offices abroad, transport companies, tourism fairs and exhibitions as information sources were very limited. Affect of travel agencies, recommendation were superior among German visitors, while British visitors used transport companies and Turkish Information Offices abroad more than German visitors as information sources. However, the primary information sources were travel agencies, friends and relatives, their recommendation and various media resources for both nations

Information sources used by overall, British and German visitors indicated small differences between shoulders. Travel agencies and media resources indicated some increase in importance of their role as information suppliers to travellers in the second shoulder. (Figure 4.11, 4.12, 4.13, 4.14, 4.15, 4.16 and Appendix 103, 104, 105).

Figure 4.11 Motivational characteristics of overall visitors by shoulder

(See also Appendix 103, 104, 105)

OVERALL OFF-SEASON MARKET'S MOTIVATIONAL CHARACTERISTICS BY SHOULDER

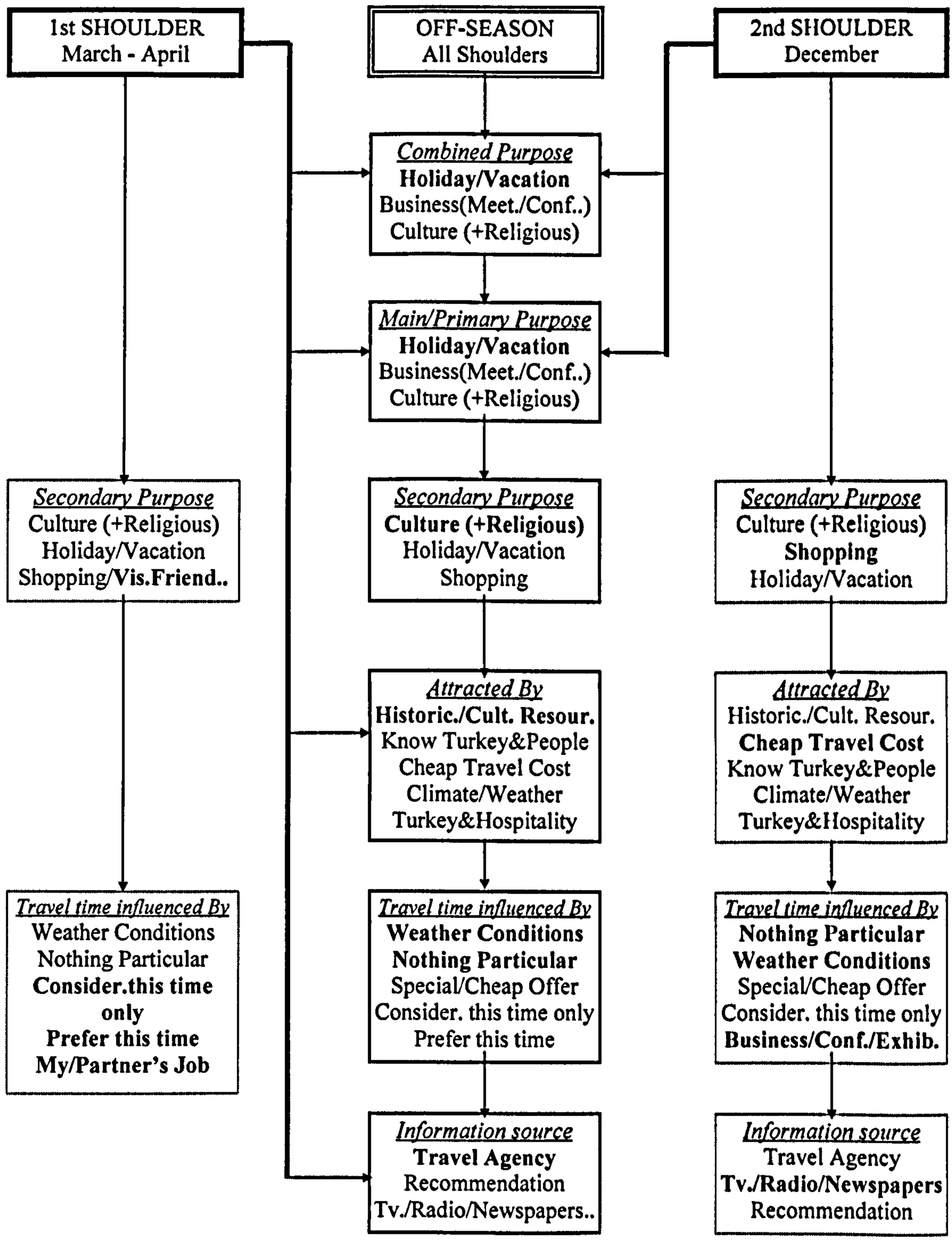


Figure 4.12 Motivational characteristics of British visitors by shoulder

(*See also Appendix 103, 104, 105*)

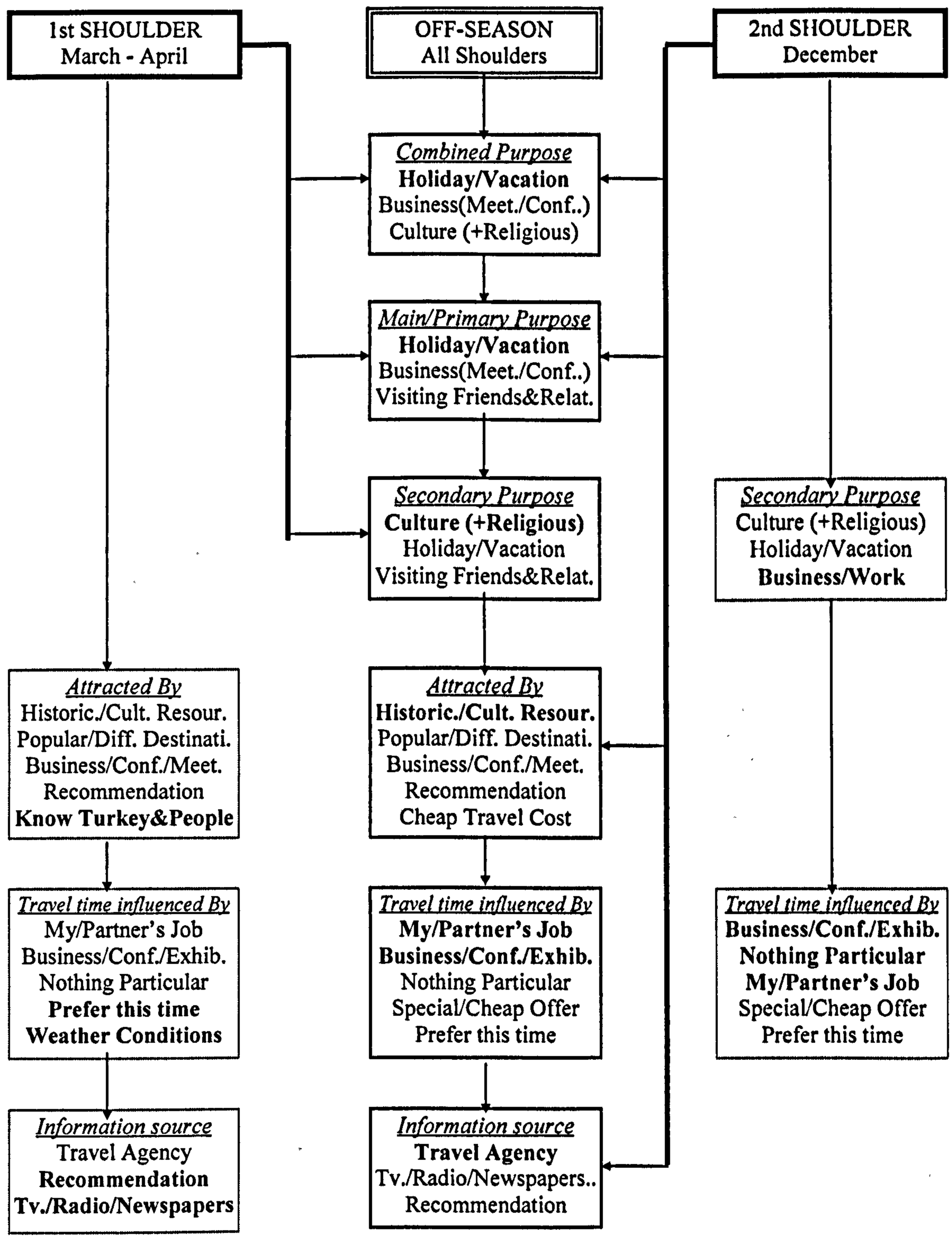


Figure 4.13 Motivational characteristics of German visitors by shoulder
(*See also Appendix 103, 104, 105*)

OFF-SEASON **GERMAN** MARKET'S MOTIVATIONAL CHARACTERISTICS
BY SHOULDER

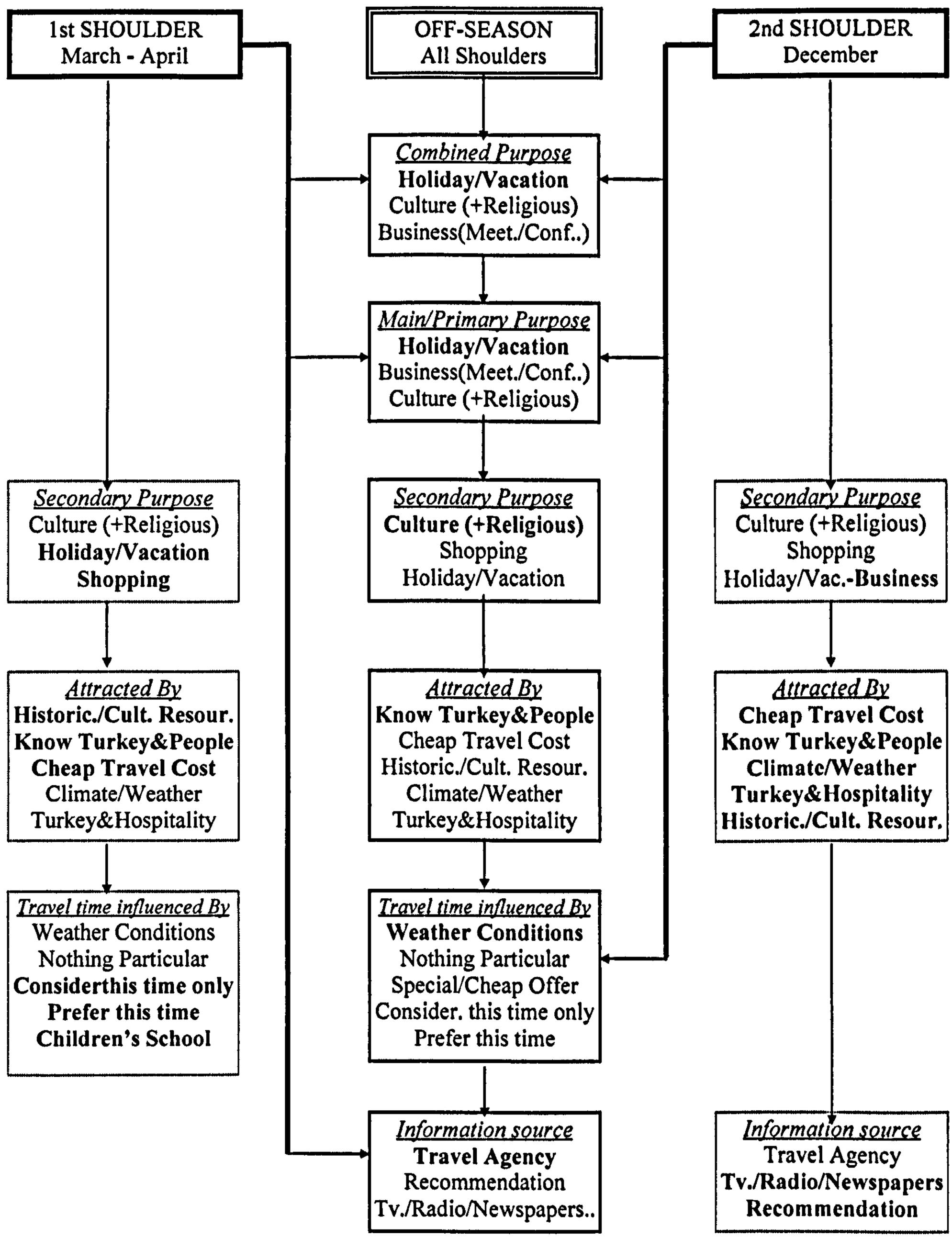


Figure 4.14 Motivational characteristics of overall visitors by destination

(See also Appendix 103, 104, 105)

OVERALL OFF-SEASON MARKET'S MOTIVATIONAL CHARACTERISTICS BY DESTINATION

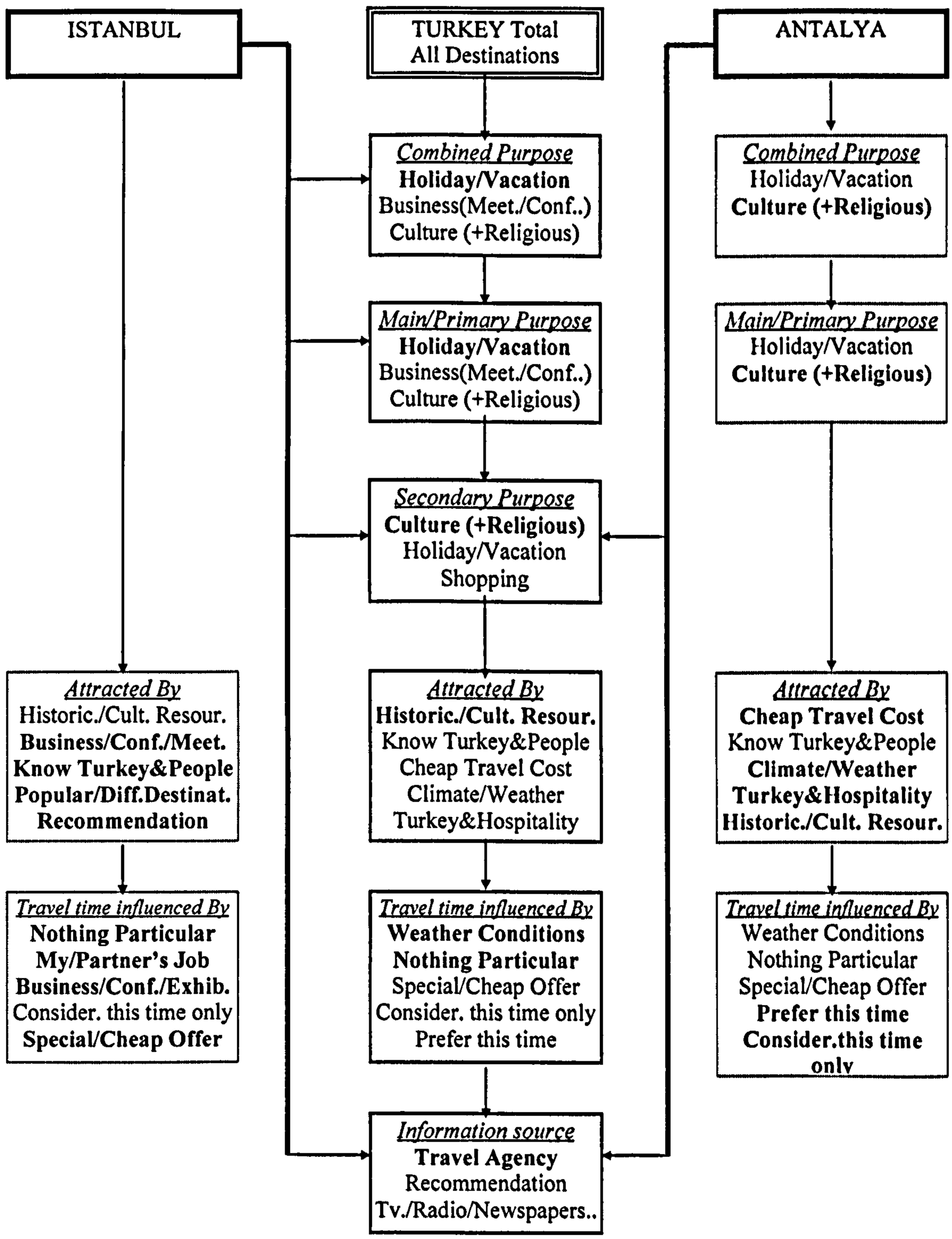


Figure 4.15 Motivational characteristics of British visitors by destination

(*See also Appendix 103, 104, 105*)

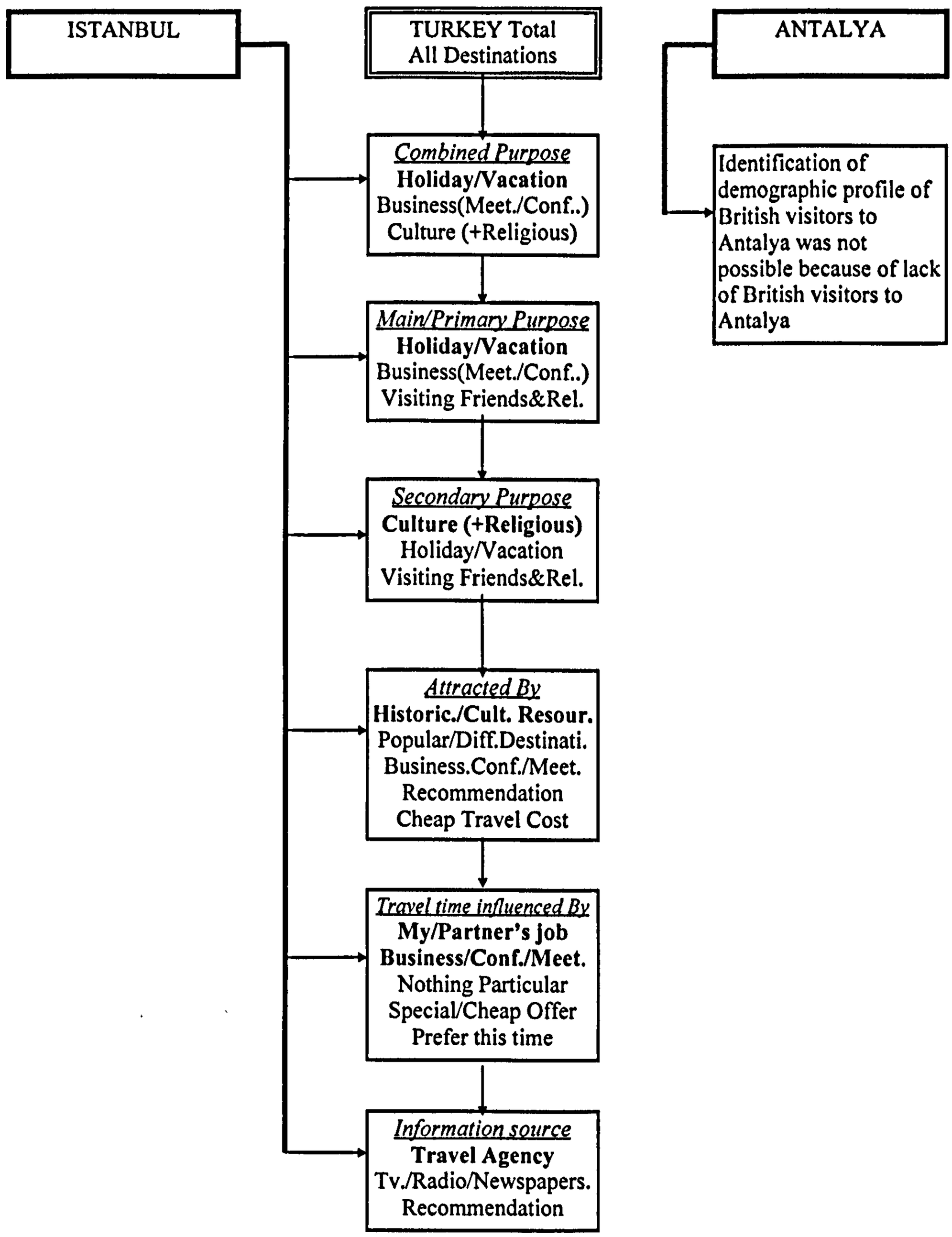
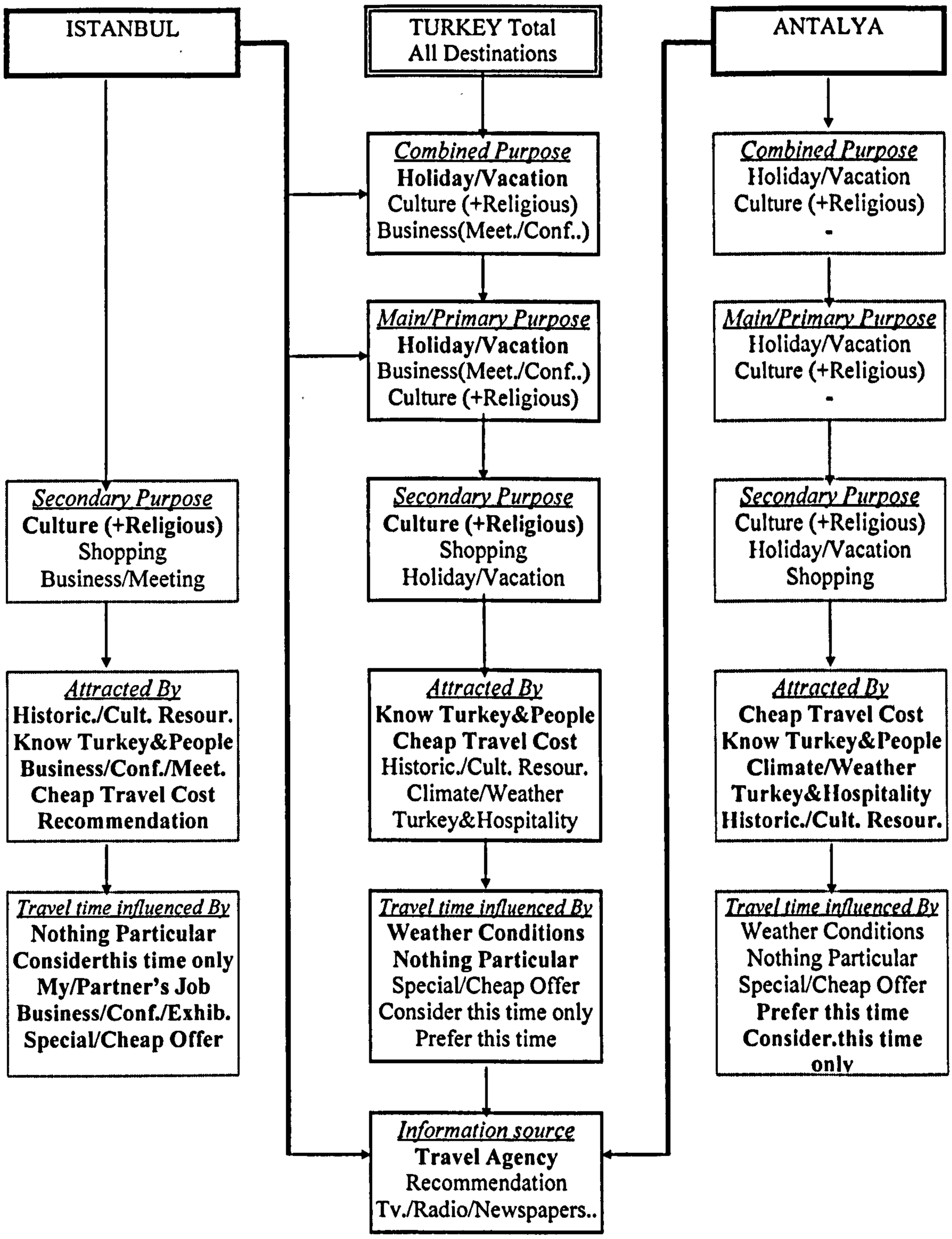


Figure 4.16 Motivational characteristics of German visitors by destination

(*See also Appendix 103, 104, 105*)

OFF-SEASON **GERMAN** MARKET'S MOTIVATIONAL CHARACTERISTICS

BY DESTINATION



4.3. Seasonal and spatial preferences if visitors free to choose

Most preferred months, seasons and reasons for these seasonal preferences

The favourite months preferred by overall visitors were overwhelmingly May, September, April and October respectively and British and German visitors months of preference indicated significant differences (p=0.000). 75% of overall visitors stated that if they were free, they would prefer visiting Turkey in these four months. On the other hand, the least preferred months were January and February. The share of visitors who were willing to visit Turkey at any time of year was less than 1% in total (Table 4.89). The favourite months were same for both nationalities as overall visitors, but secondarily and least preferred months indicated differences between British and German visitors. While March, June and November were secondary favourite months for German visitors, they were June, July and August-March for British visitors. 71% of British visitors and 76% of German visitors declared that they would prefer taking their holiday in Turkey in April, May, September and October, if they were free.

Table 4.89 Month of preference if free by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
January	-	-	9	0.7	9	0.6
February	5	1.8	14	1.1	19	1.2
March	7	2.6	87	6.8	94	6.1
April	40	14.6	179	14.1	219	14.2
May	73	26.6	367	28.8	440	28.4
June	38	13.9	70	5.5	108	7.0
July	12	4.4	21	1.6	33	2.1
August	7	2.6	37	2.9	44	2.8
September	54	19.7	235	18.5	289	18.7
October	28	10.2	181	14.2	209	13.5
November	4	1.5	40	3.1	44	2.8
December	2	0.7	31	2.4	33	2.1
All-Year-Round	4	1.5	2	0.2	6	0.4
Total	n 274	100	n 1273	100	n 1547	100
	N 206		N 765		N 971	
	(Case N) N 971 Missing: 107 (Responses N) n 1547 p= 0.000					

Table 4.90 shows on average 73% of overall visitors would choose peak season, May to October inclusive, to visit Turkey if they were free. However, the share of British visitors preferring peak season was higher compared to German visitors. In contrast, the share of German visitors who would choose first and second shoulders was higher than British visitors. In summary, against 23% of British visitors, 29% of German visitors prefer visiting Turkey out of peak season and therefore, German visitors were identified as primarily potential off-season and shoulder season visitors in the future. This also indicates that the share of visitors who were in favour of peak season in the first and second shoulders when the survey was conducted was 73% and they may change their mind easily in favour of peak season visit next time if they were not satisfied by facilities, services,

natural and man-made attractions etc. provided outside peak season and may realise their next visit to Turkey in peak season rather than in shoulders or in off-season. Therefore, the provision of facilities and services requires high standard and quality in off-season in order to attract repeat visitors as well as first-time visitors out of peak season.

Table 4.90 Seasonal preference if free by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
1st Shoulder	47	17.2	266	20.9	313	20.2
2nd Shoulder	6	2.2	71	5.6	77	5.0
Peak Season	212	77.4	911	71.6	1123	72.6
Off-Season	5	1.8	23	1.8	28	1.8
All-Year-Round	4	1.5	2	0.2	6	0.4
Total	n 274	100	n 1273	100	n 1547	100
	N 206		N 765		N 971	
	(Case N) N 971 (Responses N) n 1547 p= 0.035					
1st Shoulder: Mar.-Apr., 2nd Shoulder: Nov.-Dec., Off-Season: Jan.-Feb., Peak-Season: May-Oct.						

Table 4.91 Reason for seasonal preference if free by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Quietness	31	12.5	79	9.4	110	10.1
Cheapness	3	1.2	31	3.7	34	3.1
Prefer this time	1	0.4	6	0.7	7	0.6
Weather	136	54.8	376	44.5	512	46.9
My/Partner's job	6	2.4	25	3.0	31	2.8
School Holidays	2	0.8	4	0.5	6	0.5
Off-Seas. advantage	13	5.2	43	5.1	56	5.1
Sea Temperature	-	-	19	2.3	19	1.7
Natural Beauty	5	2.0	38	4.5	43	3.9
Sun-Shine	5	2.0	22	2.6	27	2.5
Mild Temperature	34	13.7	154	18.2	188	17.2
Nothing Particular	2	0.8	25	3.0	27	2.5
None of Above	10	4.0	22	2.6	32	2.9
Total	n 248	100	n 844	100	n 1092	100
	N 163		N 510		N 673	
	(Case N) N 673 Missing: 405 (Responses N) n 1092 p= 0.156					

The differences were not at an important level between German and British visitors in terms of primary reasons for seasonal preference (p=0.156). The primary reasons stated by visitors in choosing the time of travel if free were weather conditions, mild climate and temperatures, quietness and less tourists and children and finally all advantages of season (Table 4.91). These stated reasons were same for British and German visitors as well. However, while weather and quietness indicated more importance for British visitors in comparison with German visitors, mild climate and temperature, natural beauty, sunshine, cheapness, sea water temperature and own or partners' job were important factors for German visitors.

Although all this information provides a general outline about factors which influence visitors' timing of travel if free to decide, it does not give detailed information on which factor was effective in choosing which shoulder or season. Weather conditions, mild climate, quietness and fewer tourists were important influential factors in peak season for overall visitors who stated that they would prefer first or last months peak season which were May, September and October when the climate is much milder compared to middle of peak season (Table 4.92). On the other hand, some other factors were added to influential factors in peak season in the first and second shoulder which were all advantages of shoulder seasons, cheapness and low travel, holiday cost, own or partner's job and natural beauty. These factors' degree of influence was felt differently in first and second shoulder. While overall visitors stated that they would be influenced more by weather conditions, school holidays, natural beauty and mild climate in the first shoulder, second shoulders supreme influential factors were cheapness, own or partners' job, all advantages of second shoulder season and sunshine compared to first shoulder. Lesser factors influenced visitors' decision in off-season and these were weather, mild climate, temperature, advantages of off-season and quietness, less tourists and children. Most visitors who would prefer travelling in off-season were visitors to Antalya where climate is milder and sunny in winter. In summary, although same main factors were influential in all shoulders and seasons, their degree of influence indicated differences at different times. Demand for travelling in off-season, in second shoulder and any time in a year was rather low.

Table 4.92 Preference of travel time if free and reasons for travel time preference by nation

	Preference of travel time if free & reasons for travel time preference by nation																	
	British						German						Total					
	1st. SH.	2nd. SH.	Peak.	Off	All year	Tot.	1st. SH.	2nd. SH.	Peak seas.	Off seas.	All year	Tot.	1st. SH.	2nd. SH.	Peak seas.	Off seas.	All year	Tot.
Quiet-Fewer tourists	10.9	-	14.6	-	-	13.6	11.5	12.1	9.5	12.0	-	10.1	11.4	11.7	10.5	11.5	-	10.8
Cheapness-Price	1.8	-	0.8	-	-	0.9	7.1	9.9	3.6	-	-	4.7	6.4	9.6	3.0	-	-	4.0
Prefer/Like this time	-	-	0.4	-	-	0.3	0.6	-	0.5	-	-	0.5	0.5	-	0.5	-	-	0.4
Weather conditions	49.1	33.3	55.9	-	-	53.9	42.9	33.0	44.8	44.0	-	43.6	43.8	33.0	47.0	42.3	-	45.4
My/My Partner's job	3.6	33.3	1.5	-	-	2.2	1.2	6.6	2.8	-	-	2.6	1.6	7.4	2.5	-	-	2.5
School Holidays	1.8	-	0.8	-	-	0.9	0.6	-	0.3	-	-	0.3	0.8	-	0.4	-	-	0.4
Advantages of season	10.9	-	4.2	-	-	5.3	5.0	14.3	4.9	8.0	-	5.5	5.8	13.8	4.8	7.7	-	5.5
Sea temperature	-	-	-	-	-	-	0.3	-	2.6	-	-	1.9	0.3	-	2.1	-	-	1.6
Natural Beauty	1.8	-	1.5	-	-	1.5	5.6	1.1	4.0	-	-	4.1	5.0	1.1	3.5	-	-	3.7
Sun-Shine	3.6	-	1.1	-	-	1.5	1.2	2.2	3.7	-	-	3.0	1.6	2.1	3.1	-	-	2.7
Mild Temperature	12.7	-	16.5	-	-	15.5	21.1	13.2	18.7	20.0	-	18.9	19.9	12.8	18.3	19.2	-	18.3
Nothing Particular	-	-	0.4	-	33.3	0.6	1.9	3.3	2.3	-	50.0	2.3	1.6	3.2	1.9	.0	40.0	2.0
None of Above	3.6	33.3	2.3	100	66.7	3.7	0.9	4.4	2.4	16.0	50.0	2.5	1.3	5.3	2.4	19.2	60.0	2.7
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
N	55	3	261	1	3	323	322	91	1041	25	2	1481	377	94	1302	26	5	1804
N	17.0	0.9	80.8	0.3	0.9	100	21.7	6.1	70.3	1.7	0.1	100	20.9	5.2	72.2	1.4	0.3	100
	N 204 p=0.000 n 323						N 860 p=0.004 n 1481						N 1064 p=0.000 n 1804					
	N																	

As Table 4.92 indicates, majority of British and German visitors would prefer first shoulder and peak season if they were free to choose and indicate significant differences. However, the share of German visitors who would prefer off-season and second shoulder was higher compared to British

visitors. As noticed, the proportion of visitors who were willing to visit Turkey in all year round in total was significantly low.

The most mentioned reasons for determining travel time if free were weather conditions, mild weather and quietness, less tourists and children for both nationalities in all preferred seasons. The effect of weather conditions reached its strongest time in the peak season. Weather conditions, quietness and school holidays were factors that are more important for British visitors in comparison with German visitors for whom the remaining factors such as mild weather, cheapness and bargain prices were more effective factors in determining the time of travel if free. While natural beauty and mild climate came into front in the first shoulder, low holiday cost, advantageous of second shoulder, own or partners' job and sunshine were quite determining factors of travel time preferences in the second shoulder. On the other hand, the most mentioned factors shaping visitors' travel time preference in the peak season were weather, mild climate, convenient sea temperature and sunshine.

In summary, although the main reasons for choosing particular season to travel if free to decide were same in all seasons, there were small differences peculiar to each season and each nationality that were more dominant in that particular season or for that particular nationality. Observation and identification of these differences as well as common reasons stated should help attracting more visitors when they are interested in and divert visitors between seasons, for example using natural attractiveness of first shoulder to divert peak season visitors to first shoulder.

The overall first and second shoulder visitors' preferred time of travel if free concentrated March, April, May, June and September, October periods. However, British and German visitors indicated some differences in their preferences (Table 4.93). British visitors' preferred time of travel started from April and expanded by July. Their preference concentrated in April, May, June, July and September, October periods. On the other hand, German visitors' preference started one month earlier in March and end one month earlier in June. March, April, May, June and September, October periods were most popular preferred times to travel for German visitors. November was added to the list of second shoulder German visitors preferred months. While first shoulder German visitors preferred two months and second shoulder German visitors three months out of main peak season, British visitors preferred only one outside peak season and their preference even shift one more month inside peak season. In this respect, German visitors can be said that most appropriate tourist market to improve seasonality and prolong main season.

Table 4.94 explains and summarises the preference of visitors more clearly. The common period which was desired by all visitors in both shoulders was peak season. Second shoulder visitors were more willing to travel in off-season than first shoulder visitors. This was applicable to both British and German visitors as well. However, the proportion of German visitors who wishes to travel in

off-season, 28.3%, was well over British visitors, 21.2%. The preference of visitors also indicated differences between first and second shoulders.

Table 4.93 Month of preference if free and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
January	N	%	N	%	N	%	N	%	N	%	N	%
February	-	-	-	-	2	0.3	7	1.1	2	0.3	7	0.9
March	-	-	5	3.4	3	0.5	11	1.8	3	0.4	16	2.1
April	3	2.4	4	2.7	43	6.7	44	7.0	46	6.0	48	6.2
May	21	16.7	19	12.8	99	15.3	80	12.7	120	15.6	99	12.8
June	40	31.7	33	22.3	201	31.2	166	26.4	241	31.3	199	25.6
July	17	13.5	21	14.2	38	5.9	32	5.1	55	7.1	53	6.8
August	6	4.8	6	4.1	13	2.0	8	1.3	19	2.5	14	1.8
September	3	2.4	4	2.7	18	2.8	19	3.0	21	2.7	23	3.0
October	24	19.0	30	20.3	130	20.2	105	16.7	154	20.0	135	17.4
November	10	7.9	18	12.2	86	13.3	95	15.1	96	12.5	113	14.6
December	1	0.8	3	2.0	8	1.2	32	5.1	9	1.2	35	4.5
All-Year Round	-	-	2	1.4	2	0.3	29	4.6	2	0.3	31	4.0
Total	1	0.8	3	2.0	2	0.3	-	-	3	0.4	3	0.4
	126	100	148	100	645	100	628	100	771	100	776	100
	N 100	N 106			N 402	N 363			N 502	N 469		
	N 206 p=0.176 n 274				*N 765 p=0.001 n 1273*				*N 971 p=0.000 n 1547*			
	N No of cases (visitors) n No of responses											

Table 4.94 Seasonal preference if free and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
1st Shoulder	24	19.0	23	15.5	142	22.0	124	19.7	166	21.5	147	18.9
2nd Shoulder	1	0.8	5	3.4	10	1.6	61	9.7	11	1.4	66	8.5
Peak Season	100	79.4	112	75.7	486	75.3	425	67.7	586	76.0	537	69.2
Off-Season	-	-	5	3.4	5	0.8	18	2.9	5	0.6	23	3.0
All-Year Round	1	0.8	3	2.0	2	0.3	-	-	3	0.4	3	0.4
Total	126	100	148	100	645	100	628	100	771	100	776	100
	N 100	N 106			N 402	N 363			N 502	N 469		
	N 206 p=0.041 n 274				N 765 p=0.000 n 1273				N 971 p=0.000 n 1547			
1st Shoulder: Mar.-Apr., 2nd Shoulder: Nov.-Dec., Off-Season: Jan.-Feb., Peak-Season: May-Oct.												

In general, second shoulder visitors tended to travel in off-season more than first shoulder visitors. While the share of British visitors who stated that they would prefer off-season to travel if free increased by 3% in the second shoulder, it was 8% increase for German visitors. In summary, second shoulder visitors in general and German visitors were more willing to travel in off-season. It was also worth noting that most first and second shoulder British and German visitors preferred travelling in first shoulder to travelling in second shoulder. Therefore, the first shoulder was the most favoured season after main peak season.

The distribution of reasons stated by first and second shoulder overall visitors were quite close in both shoulders and no big differences were observed (Table 4.95). The primary reasons stated by

overall, British and German visitors were weather conditions, mild climate and temperatures, quietness and fewer tourists and children and finally all advantages of season in both shoulders. However, it was observed that while weather conditions and advantages of off-season played more important role in shaping the first shoulder overall visitors mind on travel time, quietness, mild climate and temperature, sea water temperature and own or partners' job were important factors for visitors in the second shoulder visitors. In summary, with slight differences, main reasons affecting travel time preference of all overall, British and German visitors were same in both shoulders.

Table 4.95 Reason for seasonal preference if free and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Quietness	15	13.3	16	11.9	39	8.7	40	10.1	54	9.7	56	10.5
Cheapness	2	1.8	1	0.7	16	3.6	15	3.8	18	3.2	16	3.0
Prefer This Time	1	0.9	-	-	5	1.1	1	0.3	6	1.1	1	0.2
Weather	66	58.4	70	51.9	205	46.0	171	43.0	271	48.5	241	45.2
My/Partner's Job	1	0.9	5	3.7	11	2.5	14	3.5	12	2.1	19	3.6
School Holiday	1	0.9	1	0.7	3	0.7	1	0.3	4	0.7	2	0.4
Off-Seas.Advantage	6	5.3	7	5.2	26	5.8	17	4.3	32	5.7	24	4.5
Sea Temperature	-	-	-	-	7	1.6	12	3.0	7	1.3	12	2.3
Natural Beauty	3	2.7	2	1.5	19	4.3	19	4.8	22	3.9	21	3.9
Sun-Shine	4	3.5	1	0.7	12	2.7	10	2.5	16	2.9	11	2.1
Mild Temperature	10	8.8	24	17.8	74	16.6	80	20.1	84	15.0	104	19.5
Nothing Particular	-	-	2	1.5	14	3.1	11	2.8	14	2.5	13	2.4
None of Above	4	3.5	6	4.4	15	3.4	7	1.8	19	3.4	13	2.4
Total	113	100	135	100	446	100	398	100	559	100	533	100
	N 79	N 84			N 276	N 234			N 355	N 318		
	N 163 p=0.579 n 248				N 510 p=0.227 n 844				N 673 p=0.313 n 1092			
	N No of cases (visitors) n No of responses											

Table 4.96 shows the seasonal preference of visitors. Visitors might have visited Turkey in peak season, but, in fact they would prefer shoulder seasons if they were free. Weather conditions, mild climate, quietness and fewer tourists were important influential factors in peak season for first and second shoulder visitors. In addition to these factors, some other factors gained importance while some others lost their share in the first and second shoulders. These factors were all advantages of shoulder seasons, cheapness and low travel, holiday cost in both shoulders and own or partner's job and natural beauty in the second shoulder. These factors' degree of influence was felt differently by first and second shoulder visitors. For example, while quietness, cheapness, weather, school holidays were stated as more influential by first shoulder visitors in their seasonal decision, the effect of own or partners' job, natural beauty and sunshine on the second shoulder visitors seasonal preference were much greater. In summary, although same main factors were influential in both shoulder visitors' seasonal preference, their degree of influence were differenced in for first and second shoulder visitors and their preferred seasons at different times of the year.

It was interesting that while first shoulder visitors stated that they would visit Turkey again in the first shoulder, second shoulder visitors, in contrast, preferred first shoulder to second shoulder. The favourite seasons were ranked as peak season, first shoulder and second shoulder.

Table 4.96 Preference of travel time if free and reasons for travel time preference by shoulder

	Preference of travel time if free & reasons for travel time preference by shoulder																	
	1st Shoulder						2nd Shoulder						Total					
	1st. SH.	2nd. SH.	Peak seas.	Off seas.	All year	Tot.	1st. SH.	2nd. SH.	Peak seas.	Off seas.	All year	Tot.	1st. SH.	2nd. SH.	Peak seas.	Off seas.	All year	Tot.
Quietness-less tourist	11.6	16.7	9.6	-	-	10.1	11.2	10.5	11.5	13.6	-	11.4	11.4	11.7	10.5	11.5	-	10.8
Cheapness-Price	6.8	11.1	3.5	-	-	4.3	5.9	9.2	2.5	-	-	3.7	6.4	9.6	3.0	-	-	4.0
Prefer/like this time	0.5	-	0.9	-	-	0.8	0.5	-	-	-	-	0.1	0.5	-	0.5	-	-	0.4
Weather conditions	44.7	38.9	48.0	50.0	-	46.9	42.8	31.6	46.0	40.9	-	43.9	43.8	33.0	47.0	42.3	-	45.4
My/My Partner's job	1.6	5.6	1.8	-	-	1.8	1.6	7.9	3.3	-	-	3.2	1.6	7.4	2.5	-	-	2.5
School Holidays	1.6	-	0.5	-	-	0.7	-	-	0.3	-	-	0.2	0.8	-	0.4	-	-	0.4
Advantages of seaso.	6.8	11.1	5.9	-	-	6.1	4.8	14.5	3.6	9.1	-	4.9	5.8	13.8	4.8	7.7	-	5.5
Sea Temperature	-	-	1.5	-	-	1.1	0.5	-	2.7	-	-	1.9	0.3	-	2.1	-	-	1.6
Natural Beauty	2.6	5.6	3.9	-	-	3.6	7.5	-	3.1	-	-	3.7	5.0	1.1	3.5	-	-	3.7
Sun-Shine	2.1	-	3.0	-	-	2.7	1.1	2.6	3.3	-	-	2.7	1.6	2.1	3.1	-	-	2.7
Mild Temperature	17.4	5.6	16.8	-	-	16.6	22.5	14.5	19.8	22.7	-	19.9	19.9	12.8	18.3	19.2	-	18.3
Nothing Particular	2.1	-	2.1	-	33.3	2.2	1.1	3.9	1.7	-	50.0	1.8	1.6	3.2	1.9	.0	40.0	2.0
None of Above	2.1	5.6	2.6	50.0	66.7	3.0	0.5	5.3	2.2	13.6	50.0	2.5	1.3	5.3	2.4	19.2	60.0	2.7
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
N	190	18	665	4	3	880	187	76	637	22	2	924	377	94	1302	26	5	1804
N	21.6	2.1	75.6	0.4	0.3	100	20.2	8.2	68.9	2.4	0.2	100	20.9	5.2	72.2	1.4	0.3	100
	N 534 p=0.000 n 880						N 530 p=0.000 n 924						N 1064 p=0.000 n 1804					
	N No of cases (visitors) n No of responses Missing: 411																	

Table 4.97 Month of preference if free and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
January	-	-	-	-	1	0.3	8	0.8	1	0.2	8	0.8
February	5	1.8	-	-	1	0.3	13	1.3	6	1.0	13	1.3
March	7	2.6			24	7.8	63	6.5	31	5.4	63	6.5
April	40	14.7	-	-	30	9.8	149	15.4	70	12.1	149	15.4
May	72	26.5	1	50.0	105	34.3	262	27.1	177	30.6	263	27.1
June	38	14.0	-	-	31	10.1	39	4.0	69	11.9	39	4.0
July	12	4.4	-	-	7	2.3	14	1.4	19	3.3	14	1.4
August	7	2.6	-	-	15	4.9	22	2.3	22	3.8	22	2.3
September	54	19.9	-	-	62	20.3	173	17.9	116	20.1	173	17.9
October	27	9.9	1	50.0	22	7.2	159	16.4	49	8.5	160	16.5
November	4	1.5	-	-	4	1.3	36	3.7	8	1.4	36	3.7
December	2	0.7	-	-	3	1.0	28	2.9	5	0.9	28	2.9
All-Year-Round	4	1.5	-	-	1	0.3	1	0.1	5	0.9	1	0.1
Total	272	100	2	100	306	100	967	100	578	100	969	100
	N 205	N 1			N 209	N 556			N 414	N 557		
	N 206 p=0.995 n 274				N 765 p=0.000 n 1273				N 971 p=0.000 n 1547			
	N No of cases (visitors) n No of responses											

It was interesting to observe that weather was most important factors in preferring all seasons. In other words, while some visitors preferring hot weather in peak-season; some others preferred mild weather in shoulders or colder weather in off-season. Therefore, if Turkey can reach and attract these different markets at a right time by using best appropriate policies, strategies, plans,

techniques and tools, there should be no reason to improve seasonality throughout the year and to spread and develop tourism in all regions.

The preferred time of travel of overall visitors to Istanbul and Antalya concentrated in March, April, May, June and September, October periods. However, visitors to Istanbul and Antalya indicated some differences in their preferences (Table 4.97). Preferred time of travel of visitors to Istanbul started from March and continued by June. Their preference concentrated in March, April, May, June and September, October periods. On the other hand, preference of visitors to Antalya started in March as well but end one month earlier in May. March, April, May and September, October periods were most popular preferred times to travel for visitors to Antalya. While visitors to Istanbul and Antalya both preferred two months out of main peak season, visitors' preference to Istanbul shifted one month inside the peak season. In this case, visitors to Antalya can help to reduce negative effects of peak season and improve seasonal problems faced in high season.

Table 4.98 Seasonal preference if free and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
1st Shoulder	47	17.3	-	-	54	17.6	212	21.9	101	17.5	212	21.9
2nd Shoulder	6	2.2	-	-	7	2.3	64	6.6	13	2.2	64	6.6
Peak Season	210	77.2	2	100	242	79.1	669	69.2	452	78.2	671	69.2
Off-Season	5	1.8	-	-	2	0.7	21	2.2	7	1.2	21	2.2
All-Year-Round	4	1.5	-	-	1	0.3	1	0.1	5	0.9	1	0.1
Total	272	100	2	100	306	100	967	100	578	100	969	100
	N 205	N 1			N 209	N 556			N 414	N 557		
	N 206 p=0.983 n 274				N 765 p=0.000 n 1273				N 971 p=0.000 n 1547			
	N No of cases (visitors) n No of responses											
1st Shoulder: Mar.-Apr., 2nd Shoulder: Nov.-Dec., Off-Season: Jan.-Feb., Peak-Season: May-Oct.												

The favourite period which was desired by all visitors in both destinations was peak season (Table 4.98). Generally speaking, visitors to Antalya were more willing to travel in off-season than visitors to Istanbul. This was applicable to both British and German visitors as well. While the proportion of British visitors and German visitors in Istanbul who wishes to travel in off-season was around 21%, it was 31% for German visitors in Antalya. In summary, visitors to Antalya who were overwhelmingly German were more willing to travel in off-season and the first shoulder was the most favoured season after main peak season by all visitors.

The primary reasons stated by overall, British and German visitors were weather conditions, mild climate and temperatures, quietness and fewer tourists and children and finally all advantages of season in both destinations (Table 4.99). Natural beauty was added to this list in Antalya as an extra reason. With slight differences, main reasons affecting travel time preference of all overall, British and German visitors were same in both survey places.

Table 4.99 Reason for seasonal preference if free and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Quietness	31	12.6	-	-	16	7.8	63	9.9	47	10.4	63	9.8
Cheapness	3	1.2	-	-	6	2.9	25	3.9	9	2.0	25	3.9
Prefer This Time	1	0.4	-	-	2	1.0	4	0.6	3	0.7	4	0.6
Weather	135	54.7	1	100	97	47.3	279	43.7	232	51.3	280	43.8
My/Partner's Job	6	2.4	-	-	4	2.0	21	3.3	10	2.2	21	3.3
School Holiday	2	0.8	-	-	1	0.5	3	0.5	3	0.7	3	0.5
Off-Seas.Advantage	13	5.3	-	-	9	4.4	34	5.3	22	4.9	34	5.3
Sea Temperature	-	-	-	-	7	3.4	12	1.9	7	1.5	12	1.9
Natural Beauty	5	2.0	-	-	8	3.9	30	4.7	13	2.9	30	4.7
Sun-Shine	5	2.0	-	-	4	2.0	18	2.8	9	2.0	18	2.8
Mild Temperature	34	13.8	-	-	29	14.1	125	19.6	63	13.9	125	19.5
Nothing Particular	2	0.8	-	-	10	4.9	15	2.3	12	2.7	15	2.3
None of Above	10	4.0	-	-	12	5.9	10	1.6	22	4.9	10	1.6
Total	247	100	1	100	205	100	639	100	452	100	640	100
	cN 162		cN 1		cN 134		cN 376		cN 296		cN 377	
	cN=163 p=NA rN=248				cN=510 p=0.059 rN=844				cN=673 p=0.032 rN=1092			
	N No of cases (visitors) n No of responses											

Table 4.100 shows the majority of visitors to Istanbul and Antalya prefer visiting Turkey in the peak season and indicate significant differences (p=0.000). However, the share of visitors to Istanbul who prefer peak season was considerably higher than visitors in Antalya. In contrast, more visitors to Antalya preferred shoulder seasons and off-season than visitors to Antalya. In other words, it seems that visitors to Antalya were much appreciated with their holiday in Turkey in shoulder seasons than visitors in Istanbul.

Table 4.100 Preference of travel time if free and reasons for travel time preference by survey place

	Preference of travel time if free & reasons for travel time preference by survey place																	
	Istanbul						Antalya						Total					
	1st. SH.	2nd. SH.	Peak seas.	Off seas.	All year	Tot.	1st. SH.	2nd. SH.	Peak seas.	Off seas.	All year	Tot.	1st. SH.	2nd. SH.	Peak seas.	Off seas.	All year	Tot.
Quietness-less tourist	10.5	8.3	11.5	-	-	11.1	11.8	12.2	9.9	13.0	-	10.6	11.4	11.7	10.5	11.5	-	10.8
Cheapness-price	2.9	-	1.8	-	-	1.9	7.7	11.0	3.8	-	-	5.1	6.4	9.6	3.0	-	-	4.0
Prefer/like this time	-	-	0.6	-	-	0.5	0.7	-	0.4	-	-	0.4	0.5	-	0.5	-	-	0.4
Weather conditions	48.6	33.3	50.5	-	-	49.3	41.9	32.9	44.8	47.8	-	43.3	43.8	33.0	47.0	42.3	-	45.4
My/My Partners job	2.9	8.3	1.4	-	-	1.7	1.1	7.3	3.3	-	-	3.0	1.6	7.4	2.5	-	-	2.5
School Holidays	1.0	-	0.6	-	-	0.6	0.7	-	0.3	-	-	0.3	0.8	-	0.4	-	-	0.4
Advantages of season	7.6	16.7	4.8	-	-	5.4	5.1	13.4	4.8	8.7	-	5.5	5.8	13.8	4.8	7.7	-	5.5
Sea temperature	1.0	-	2.0	-	-	1.7	-	-	2.1	-	-	1.4	0.3	-	2.1	-	-	1.6
Natural Beauty	1.9	-	3.4	-	-	3.0	6.3	1.2	3.6	-	-	4.0	5.0	1.1	3.5	-	-	3.7
Sun-shine	3.8	-	2.0	-	-	2.2	0.7	2.4	3.9	-	-	3.0	1.6	2.1	3.1	-	-	2.7
Mild temperature	14.3	8.3	15.8	-	-	15.3	22.1	13.4	19.8	21.7	-	19.9	19.9	12.8	18.3	19.2	-	18.3
Nothing Particular	1.9	-	1.8	-	50.0	2.1	1.5	3.7	2.0	-	-	2.0	1.6	3.2	1.9	.0	40.0	2.0
None of Above	3.8	25.0	4.0	100	50.0	5.1	0.4	2.4	1.4	8.7	100	1.4	1.3	5.3	2.4	19.2	60.0	2.7
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
n	105	12	505	3	4	629	272	82	797	23	1	1175	377	94	1302	26	5	1804
rN%	16.7	1.9	80.3	0.5	0.6	100	23.1	7.0	67.8	2.0	0.1	100	20.9	5.2	72.2	1.4	0.3	100
	N 393 p=0.000 n 629						N 671 p=0.000 n 1175						N 1064 p=0.000 n 1804					
	N No of cases (visitors) n No of responses Missing: 411																	

Weather conditions, mild climate, quietness and fewer tourists were important influential factors in peak season for visitors in Istanbul and Antalya. In the first and second shoulders some other factors came forward which were cheapness, own or partner's job, advantages of shoulders and natural beauty. These factors' degree of influence was felt differently by first and second shoulder visitors. While quietness, weather conditions, natural beauty and mild temperature were dominant influential factors in Istanbul and Antalya in the first shoulder, dominant factors in the second shoulder in both destinations were cheapness, own or partner's job and advantages of shoulder seasons. In summary, although same main factors were influential in both visitors' seasonal preference in Istanbul and Antalya, their degree of influence were different in these destinations and in their favourite seasons.

Most preferred regions if free

Nearly half of the overall visitors' favourite region was Mediterranean region in South Turkey. The regional preference of German and British visitors indicated important difference (p=0.000). The other secondarily preferred regions were Aegean, Marmara and Central Anatolia respectively (Table 4.101). Although the share of visitors who would prefer Eastern and Central regions were rather low, the difference between these regions' and secondarily popular regions' share in total was not significantly wider. For example, while around 4% of overall visitors preferred Eastern and South Eastern Anatolian regions, 11% preferred Black Sea region. Only Mediterranean region showed distinctive difference with 48% preference rate. In other words, a large part of the demand was concentrated in coastal regions, particularly in Mediterranean region.

Table 4.101 Preferred region if free by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Marmara	44	14.4	114	10.8	158	11.6
Aegean	60	19.7	124	11.7	184	13.5
Mediterranean	92	30.2	560	52.9	652	47.8
Central Anatolia	31	10.2	61	5.8	92	6.7
Black Sea	42	13.8	106	10.0	148	10.9
East Anatolia	18	5.9	37	3.5	55	4.0
S. East Anatolia	13	4.3	43	4.1	56	4.1
All regions	5	1.6	13	1.2	18	1.3
Total	n 305	100	n 1058	100	n 1363	100
	N 193		N 731		N 924	
	(Case N) N 924 (Responses N) n 1363 p= 0.000					

British and German visitors' regional preferences indicated some differences. While more German visitors preferring and concentrating in Mediterranean region compared to British visitors, the proportion of British visitors who prefer remaining six regions were higher than German visitors. In this respect, although the number of British visitors who prefer these six regions more than

German visitors was small, British tourist market seems better market to maintain regional balance in tourism activities.

However, identification of most preferred regions is not enough to form sound marketing and promotion policies in the immediate future. Table 4.102 correlates the preferred regions and favourite travel time and gives much clear perspective on which region would be visited by visitors at what time of year. The regional and seasonal preference of German and British visitors also indicated important differences (p=0.000). German and overall visitors preferences indicated parallel characteristics. The most favoured region, Mediterranean region, was preferred almost all year round, but this region was more popular among overall and German visitors who prefer visiting Turkey in off-season and second shoulder. Mediterranean, Black Sea, Aegean and Marmara regions were primarily preferred regions by overall and German visitors who wants to visit Turkey in first shoulder, second shoulder and peak season visitors. Overall and German Visitors' preference who prefer travelling in off-season were different. Eastern Anatolia, Black Sea and Central Anatolia regions were their preferred regions besides favourite region, Mediterranean region. This indicates that if off-season tourism provision is improved in regions preferred by visitors who want to visit these regions out of peak season, and the number of off-season visitors levelled or approached to number of peak season visitors, there should be no doubt that the balance in the distribution of tourism supply and demand in time and space will be maintained.

Table 4.102 Preference of travel time and region of visit if free by nationality

	Preference of travel time and region of visit by nationality																	
	British						German						Total					
	1st. shou	2nd. shou	Peak seas.	Off seas.	All year	Tot.	1st. shou	2nd. shou	Peak seas.	Off seas.	All year	Tot.	1st. shou	2nd. shou	Peak seas.	Off seas.	All year	Tot.
Marmara	18.4	37.5	13.5	-	-	14.6	10.5	6.8	11.5	-	-	10.9	11.8	9.4	11.9	-	-	11.6
Aegean	18.4	25.0	18.3	16.7	-	18.4	11.7	8.0	13.1	3.4	-	12.4	12.8	9.4	14.2	5.7	-	13.5
Mediterranean	18.4	12.5	31.5	16.7	-	28.5	47.2	58.0	50.3	62.1	-	50.2	42.5	54.2	46.5	54.3	-	46.1
Central Anatolia	15.8	-	9.3	-	50.0	10.4	7.1	6.8	5.8	10.3	-	6.2	8.5	6.3	6.5	8.6	33.3	7.0
Black Sea	13.2	12.5	14.4	50.0	-	14.6	13.3	9.1	10.2	6.9	-	10.7	13.2	9.4	11.1	14.3	-	11.5
East Anatolia	9.2	-	6.3	16.7	-	6.8	5.6	6.8	3.3	13.8	-	4.1	6.2	6.3	3.9	14.3	-	4.6
South East Anatolia	6.6	-	4.8	-	-	4.9	4.1	4.5	4.3	3.4	-	4.2	4.5	4.2	4.4	2.9	-	4.4
All Regions	-	12.5	1.8	-	50.0	1.9	0.5	-	1.5	-	100	1.2	0.4	1.0	1.6	-	66.7	1.4
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
n	76	8	333	6	2	425	392	88	1332	29	1	1842	468	96	1665	35	3	2267
rN%	17.9	1.9	78.4	1.4	.5	100	21.3	4.8	72.3	1.6	.1	100	20.6	4.2	73.4	1.5	.1	100
	N 188 p=0.000 n 425						N 717 p=0.000 n 1842						N 905 p=0.000 n 2267					
	N No of cases (visitors) n No of responses Missing: 173																	

Overwhelming majority of British visitors preferred visiting Turkey in peak season and first shoulder seasons. British visitors' regional preferences in different seasons were rather different than German and overall visitors. British visitors' favourite regions in peak season were Mediterranean, Aegean, Black Sea and Marmara regions. However, Mediterranean region was more dominant in peak season compared to others. On the other hand, similar proportion of British visitors who preferred visiting Turkey in first shoulder was more evenly distributed between

regions. Their preferences did not concentrate in one or two particular regions in first shoulder. In short, most British visitors wanted to visit Mediterranean region in peak season, but distribution of British visitors who wanted to visit Turkey in first shoulder was more balanced between regions.

Table 4.103 Preferred region if free and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	n	%	n	%	n	%	n	%	n	%	n	%
Marmara	21	15.9	23	13.3	70	12.2	44	9.1	91	12.9	67	10.2
Aegean	23	17.4	37	21.4	78	13.6	46	9.5	101	14.3	83	12.6
Mediterranean	43	32.6	49	28.3	280	48.9	280	57.7	323	45.8	329	50.0
Central Anatolia	13	9.8	18	10.4	33	5.8	28	5.8	46	6.5	46	7.0
Black Sea	19	14.4	23	13.3	58	10.1	48	9.9	77	10.9	71	10.8
East Anatolia	6	4.5	12	6.9	23	4.0	14	2.9	29	4.1	26	4.0
South East Anatolia	3	2.3	10	5.8	24	4.2	19	3.9	27	3.8	29	4.4
All Regions	4	3.0	1	0.6	7	1.2	6	1.2	11	1.6	7	1.1
Total	132	100	173	100	573	100	485	100	705	100	658	100
	N 92		N 101		N 388		N 343		N 480		N 444	
	N 193 p=0.678 n 305				N 731 p=0.021 n 1058				N 924 p=0.224 n 1363			
	N No of cases (visitors) n No of responses											

Table 4.104 Preference of travel time and region of visit if free by shoulder season

	Preference of travel time and region of visit by shoulder																	
	First Shoulder						Second Shoulder						Total					
	1st. Sho	2nd. Sho	Peak seas.	Off seas.	All year	Tot.	1st. Sho	2nd. Sho	Peak seas.	Off seas.	All year	Tot.	1st. Sho	2nd. Sho	Peak seas.	Off seas.	All year	Tot.
Marmara	14.2	-	12.5	-	-	12.6	9.2	11.0	11.3	-	-	10.5	11.8	9.4	11.9	-	-	11.6
Aegean	11.7	7.1	15.4	-	-	14.4	14.0	9.8	12.9	6.7	-	12.7	12.8	9.4	14.2	5.7	-	13.5
Mediterranean	43.5	57.1	46.4	60.0	-	45.9	41.5	53.7	46.7	53.3	-	46.3	42.5	54.2	46.5	54.3	-	46.1
Central Anatolia	8.8	7.1	5.3	-	50.0	6.1	8.3	6.1	7.7	10.0	-	7.8	8.5	6.3	6.5	8.6	33.3	7.0
Black Sea	11.7	14.3	10.9	-	-	11.1	14.8	8.5	11.2	16.7	-	11.8	13.2	9.4	11.1	14.3	-	11.5
Eastern Anatolia	5.9	7.1	3.4	40.0	-	4.1	6.6	6.1	4.4	10.0	-	5.1	6.2	6.3	3.9	14.3	-	4.6
South East Anatolia	3.8	-	4.1	-	-	4.0	5.2	4.9	4.7	3.3	-	4.8	4.5	4.2	4.4	2.9	-	4.4
All regions	0.4	7.1	2.0	-	50.0	1.8	0.4	-	1.1	-	100	1.0	.4	1.0	1.6	-	66.7	1.4
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
n	239	14	850	5	2	1110	229	82	815	30	1	1157	468	96	1665	35	3	2267
rN%	21.5	1.3	76.6	0.5	0.2	100	19.8	7.1	70.4	2.6	0.1	100	20.6	4.2	73.4	1.5	.1	100
	N 469 p=0.000 n 1110						N 436 p=0.000 n 1157						N 905 p=0.000 n 2267					
	N No of cases (visitors) n No of responses Missing: 173																	

No significant differences were observed in the preference rate of regions between shoulders. Similar proportion of visitors in both shoulders preferred visiting same region (Table 4.103). First and second shoulder overall visitors' preferred regions of visit were ranked as Mediterranean, Aegean, Marmara and Black Sea which all are located on the coast. The share of visitors who prefer interior regions were rather low. British and German visitors also indicated similar preferences with overall visitors. However, while German visitors' preferences concentrated significantly in single region, Mediterranean region, distribution of British visitors between regions in first shoulder and in particular in the second shoulder was more balanced compared to German visitors. In other words, British visitors, in particular second shoulder British visitors and secondly,

first shoulder German visitors could help improving regional balance in tourism in their future visits.

As Table 4.104 shows, majority of first and second shoulder visitors who wants to visit Turkey in the future particularly in off-season and second shoulder season prefer visiting overwhelmingly Mediterranean region. This shows that an opportunity exists for utilising facilities and all attractions of Mediterranean region in off-season and shoulder seasons which has more than one third of bed capacity in Turkey as much as they are benefited in peak season. To do this, there is a need for specialised and professional promotion and marketing activities towards potential off-season visitors and provision of year-round tourism facilities and attractions. The other regions preferred in off-season and shoulder seasons were Aegean, Black Sea, Marmara and Central Anatolian regions. A very small proportion of visitors preferred Eastern and South Eastern Anatolia even in peak season. However, it indicates that even it is very small, demand for tourism exists for Eastern and interior regions of Turkey and with appropriate plans and strategies and its proper application demand for less-popular regions can be increased.

Table 4.105 Preferred region if free and survey place by nationality

	British						German						Total					
	Istanbul		Antalya				Istanbul		Antalya				Istanbul		Antalya			
	n	%	n	%	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Marmara	44	14.5	-	-	44	14.4	43	15.0	71	9.2	114	10.8	87	14.8	71	9.2	158	11.6
Aegean	60	19.8	-	-	60	19.7	35	12.2	89	11.5	124	11.7	95	16.1	89	11.5	184	13.5
Mediterranean	92	30.4	-	-	92	30.2	123	43.0	437	56.6	560	52.9	215	36.5	437	56.5	652	47.8
Centr. Anatolia	31	10.2	-	-	31	10.2	16	5.6	45	5.8	61	5.8	47	8.0	45	5.8	92	6.7
Black Sea	41	13.5	1	50.0	42	13.8	41	14.3	65	8.4	106	10.0	82	13.9	66	8.5	148	10.9
East Anatolia	17	5.6	1	50.0	18	5.9	13	4.5	24	3.1	37	3.5	30	5.1	25	3.2	55	4.0
S.East Anatolia	13	4.3	-	-	13	4.3	12	4.2	31	4.0	43	4.1	25	4.2	31	4.0	56	4.1
All regions	5	1.7	-	-	5	1.6	3	1.0	10	1.3	13	1.2	8	1.4	10	1.3	18	1.3
Total	303	100	2	100	305	100	286	100	772	100	1058	100	589	100	774	100	1363	100
	N 192		N 1				N 195		N 536				N 387		N 537			
	N 193 p=0.312 n 305						N 731 p=0.000 n 1058						N 924 p=0.000 n 1363					
	N No of cases (visitors) n No of responses																	

Significant differences were observed in the overall visitors' regional choice in Antalya and Istanbul. While more than 56% of overall and German visitors to Antalya prefer visiting Mediterranean region in which Antalya is located, the proportion of overall, British and German visitors to Istanbul who prefer other regions were quite higher compared to visitors to Antalya (Table 4.105). Overall and German visitors' regional choices in both destinations were same; Mediterranean, Aegean, Marmara and Black Sea regions. In addition to these regions, Central Anatolia was in the preferred region list of British visitors to Istanbul. Distribution of regional preferences of British and German visitors to Istanbul was more balanced compared to visitors to Antalya. In other words, German visitors and in particular British visitors to Istanbul could help improving regional balance in tourism in their future visits. German visitors to Antalya tend to concentrate in Mediterranean region.

As Table 4.106 indicates, visitors to Istanbul supremely prefer visiting Turkey in peak season. Against 69% of visitors to Antalya, as high as 80% of visitors to Istanbul prefer visiting Turkey in peak season. Most visitors to Antalya who wants to visit Turkey in the future particularly in off-season and second shoulder season prefer visiting overwhelmingly Mediterranean region. Once more, this shows the opportunity to improve off-season and shoulder season tourism. The other regions preferred in off-season and shoulder seasons were ranked as Aegean, Black Sea, Marmara and Central Anatolian and Eastern Anatolian regions. The proportion of visitors who prefer Eastern and South Eastern Anatolia was very small even in peak season.

Table 4.106 Preference of travel time and region of visit if free by survey place

	Preference of travel time and region of visit by survey place																	
	Istanbul						Antalya						Total					
	1st. Sh	2nd. Sh	Peak seas.	Off seas.	All year	Tot.	1st. Sh	2nd. Sh	Peak seas.	Off seas.	All year	Tot.	1st. Sh	2nd. Sh	Peak seas.	Off seas.	All year	Tot.
Marmara	17.7	30.8	14.3	-	-	15.0	9.2	6.0	10.2	-	-	9.5	11.8	9.4	11.9	-	-	11.6
Aegean	14.9	15.4	15.4	12.5	-	15.2	11.9	8.4	13.4	3.7	-	12.6	12.8	9.4	14.2	5.7	-	13.5
Mediterranean	26.2	23.1	37.4	12.5	-	34.9	49.5	59.0	52.8	66.7	-	52.7	42.5	54.2	46.5	54.3	-	46.1
Central Anatolia	10.6	-	7.7	-	33.3	8.1	7.6	7.2	5.7	11.1	-	6.3	8.5	6.3	6.5	8.6	33.3	7.0
Black Sea	15.6	15.4	14.3	37.5	-	14.7	12.2	8.4	8.8	7.4	-	9.5	13.2	9.4	11.1	14.3	-	11.5
Eastern Anatolia	9.2	7.7	5.2	37.5	-	6.2	4.9	6.0	3.0	7.4	-	3.7	6.2	6.3	3.9	14.3	-	4.6
South East Anatolia	5.0	-	4.6	-	-	4.5	4.3	4.8	4.3	3.7	-	4.3	4.5	4.2	4.4	2.9	-	4.4
All regions	0.7	7.7	1.2	-	66.7	1.4	0.3	-	1.8	-	-	1.3	.4	1.0	1.6	-	66.7	1.4
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
n	141	13	677	8	3	842	327	83	988	27	-	1425	468	96	1665	35	3	2267
rN%=	16.7	1.5	80.4	1.0	0.4	100	22.9	5.8	69.3	1.9	-	100	20.6	4.2	73.4	1.5	.1	100
	N 373 p=0.000 n 842						N 532 p=0.028 n 1425						N 905 p=0.000 n 2267					
	N No of cases (visitors) n No of responses Missing: 173																	

Although the favourite region is Mediterranean and favourite time of visit is peak season for visitors to Istanbul, distribution of visitors to Istanbul between regions were fairly even compared to visitors to Antalya. Therefore, it can be said that, visitors to Antalya could help improving seasonality better than visitors to Istanbul, but visitors to Istanbul could help improving regional imbalance better than visitors to Antalya.

Future visit intentions

About eighty percent of overall visitors declared that they would visit Turkey again in the future. This means that overwhelming majority of visitors were generally happy with the facilities, services, opportunities and natural and man-made attractions in Turkey. Very small number of visitors did not want to visit Turkey in the future. On the other hand, 17% of overall visitors' decision on the future visit to Turkey was not clear yet. In summary, while 80% of all visitors were highly potentially repeat visitors in the future, 17% of them were also potential visitors but they require special and extra attention to attract them to Turkey again in the future (Table 4.107).

Significant differences were observed on the future intentions of British and German visitors (p= 0.00000< 0.05). While the share of German visitors who stated that they would visit Turkey again was 83% in total, it went down to 67% for British visitors. Eventually, the share of British visitors who had not made their mind on the future visit yet and who did not want to visit Turkey once more in the future was higher than German visitors. It was clear that German visitors were more appreciated their trip to Turkey than British visitors.

Table 4.107 Future intentions to visit Turkey by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Yes	148	66.7	649	83.2	797	79.5
Perhaps	63	28.4	108	13.8	171	17.1
No	6	2.7	8	1.0	14	1.4
Don't Know	5	2.3	15	1.9	20	2.0
Total	222	100	780	100	1002	100
	N 1002 p= 0.00000< 0.05 Missing:76					

Although some significant relationships were found between the season of visit and overall visitors' future intention about visiting Turkey, these relationships were not such significant for British visitors in particular and German visitors (Table 4.108). In general, overall, British and German visitors' share who stated that they would visit Turkey again was higher in the first shoulder and the share of visitors who were not certain on the next visit and who would not visit Turkey again in the future was higher in the second shoulder. In other words, visitors were more satisfied in first shoulder compared to second shoulder.

Table 4.108 Future intentions to visit Turkey and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Yes	72	69.2	76	64.4	350	84.7	299	81.5	422	81.6	375	77.3
Perhaps	29	27.9	34	28.8	57	13.8	51	13.9	86	16.6	85	17.5
No	1	1.0	5	4.2	3	0.7	5	1.4	4	0.8	10	2.1
Don't Know	2	1.9	3	2.5	3	0.7	12	3.3	5	1.0	15	3.1
Total	104	100	118	100	413	100	367	100	517	100	485	100
	N 222 p=0.47553 >0.05				N 780 p=0.05617 > 0.05				N 1002 p=0.02514< 0.05			

As Table 4.109 shows, overall visitors' future intentions indicated differences in Istanbul and Antalya. The proportion of overall visitors who would visit Turkey again in the future was higher in Antalya. No significant differences were recorded German visitors' intentions in Istanbul and Antalya. However, in contrast to overall visitors, the share of visitors who wanted to visit Turkey again was higher in Istanbul. On the other hand, while British visitors share in total who had intentions to visit Turkey in the future was significantly lower in Istanbul in comparison with German visitors in Istanbul, proportion of visitors who had no clear idea about visiting Turkey

again and who did not want to visit Turkey in the future was considerably high. In short, most British and German visitors were pleased with their visit and had intentions to visit Turkey again although the share of British visitors who had no definite intentions was higher. (Figure 4.17, 4.18, 4.19, 4.20, 4.21, 4.22 and Appendix 106, 107, 108).

Table 4.109 Future intentions to visit Turkey and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Yes	147	66.8	1	50.0	189	84.4	460	82.7	336	75.7	461	82.6
Perhaps	62	28.2	1	50.0	31	13.8	77	13.8	93	20.9	78	14.0
No	6	2.7	-	-	1	0.4	7	1.3	7	1.6	7	1.3
Don't Know	5	2.3	-	-	3	1.3	12	2.2	8	1.8	12	2.2
Total	220	100	2	100	224	100	556	100	444	100	558	100
	N 222 p=0.91524 >0.05				N 780 p=0.65114 >0.05				N 1002 p=0.03114< 0.05			

Figure 4.17 Overall visitors' seasonal, spatial preferences by shoulder
(*See also Appendix 106, 107, 108*)

OVERALL OFF-SEASON MARKET'S
TRAVEL PREFERENCES IF FREE TO CHOOSE BY SHOULDER

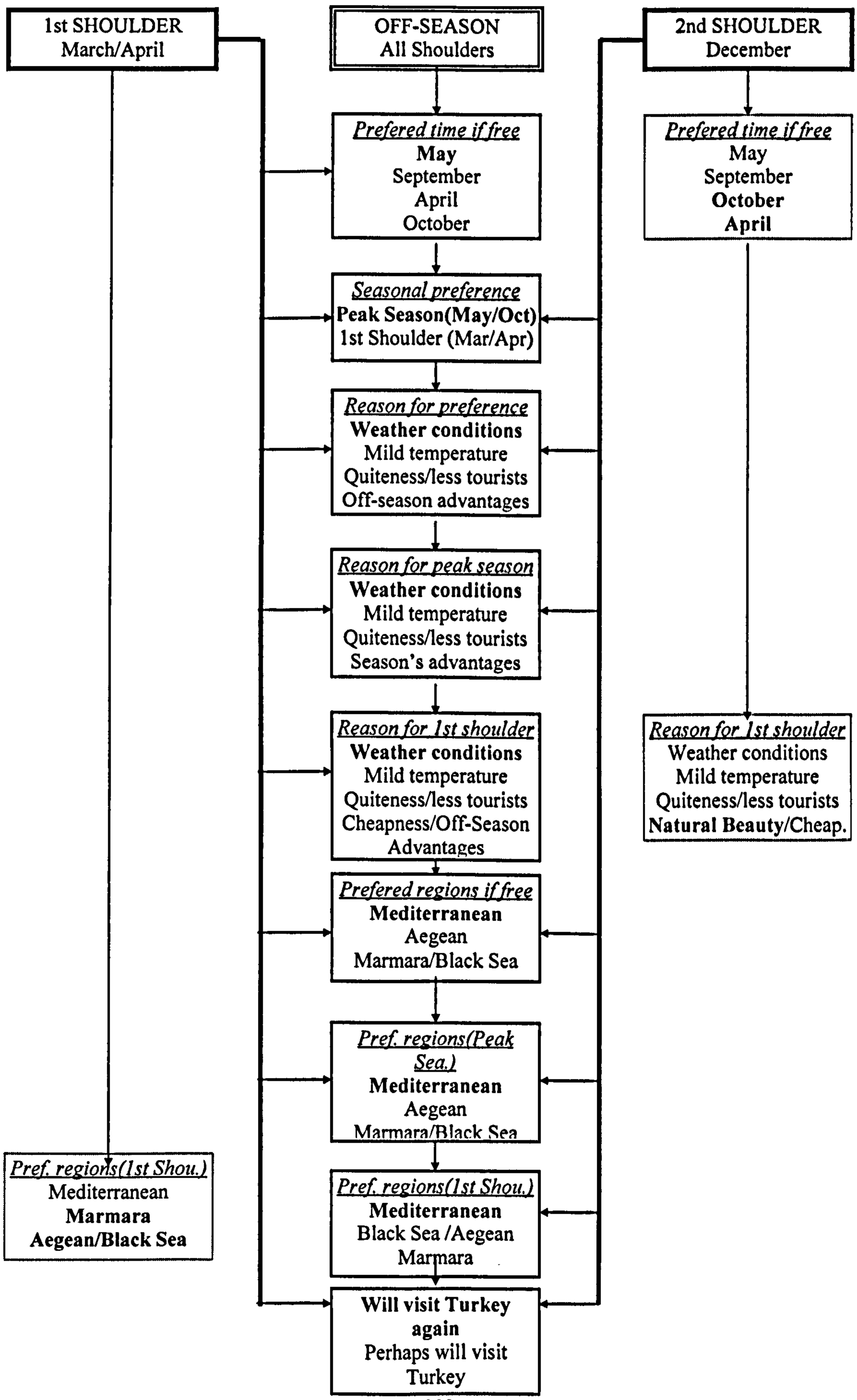


Figure 4.18 British visitors' seasonal, spatial preferences by shoulder
(*See also Appendix 106, 107, 108*)

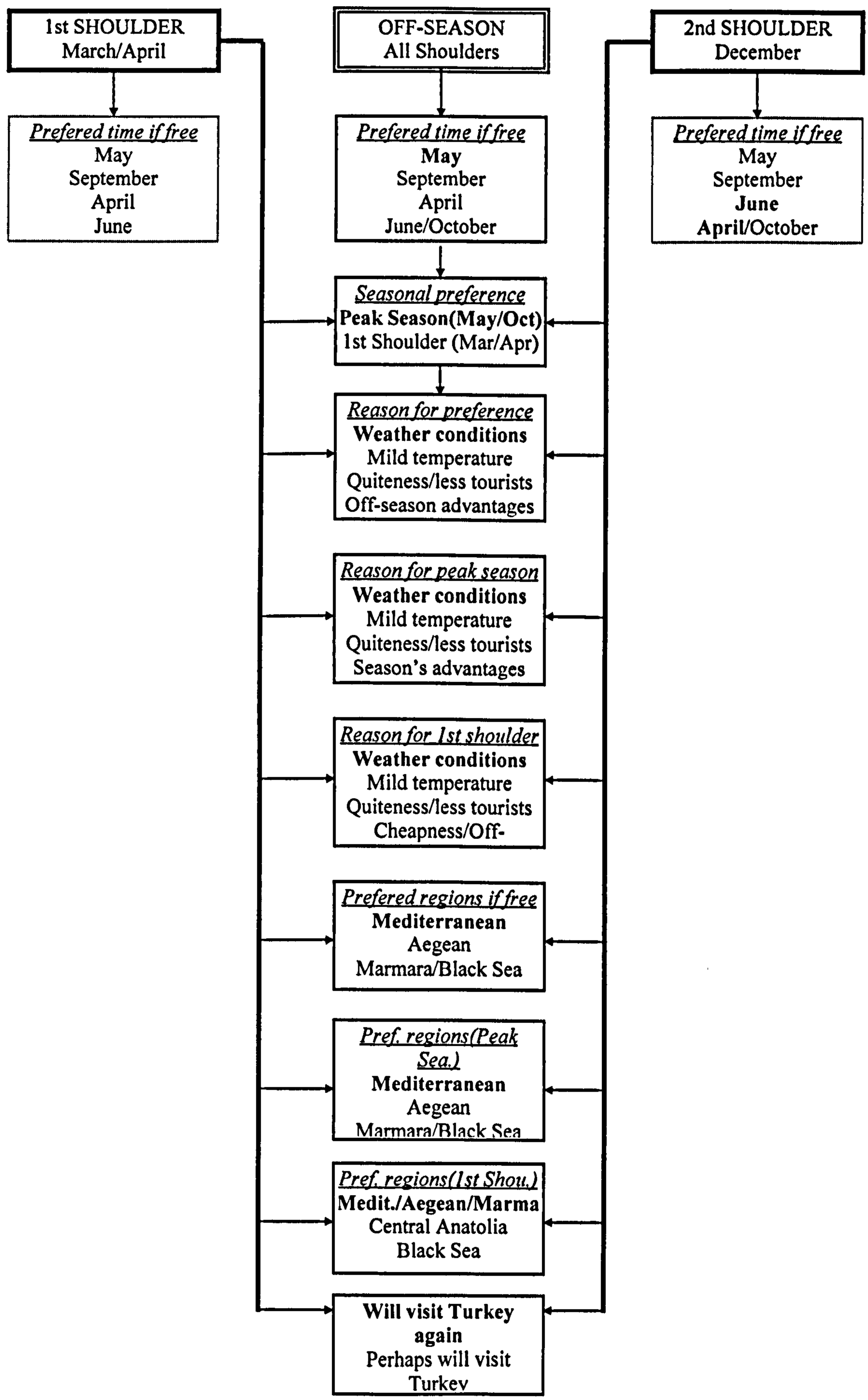


Figure 4.19 German visitors' seasonal, spatial preferences by shoulder
(*See also Appendix 106, 107, 108*)

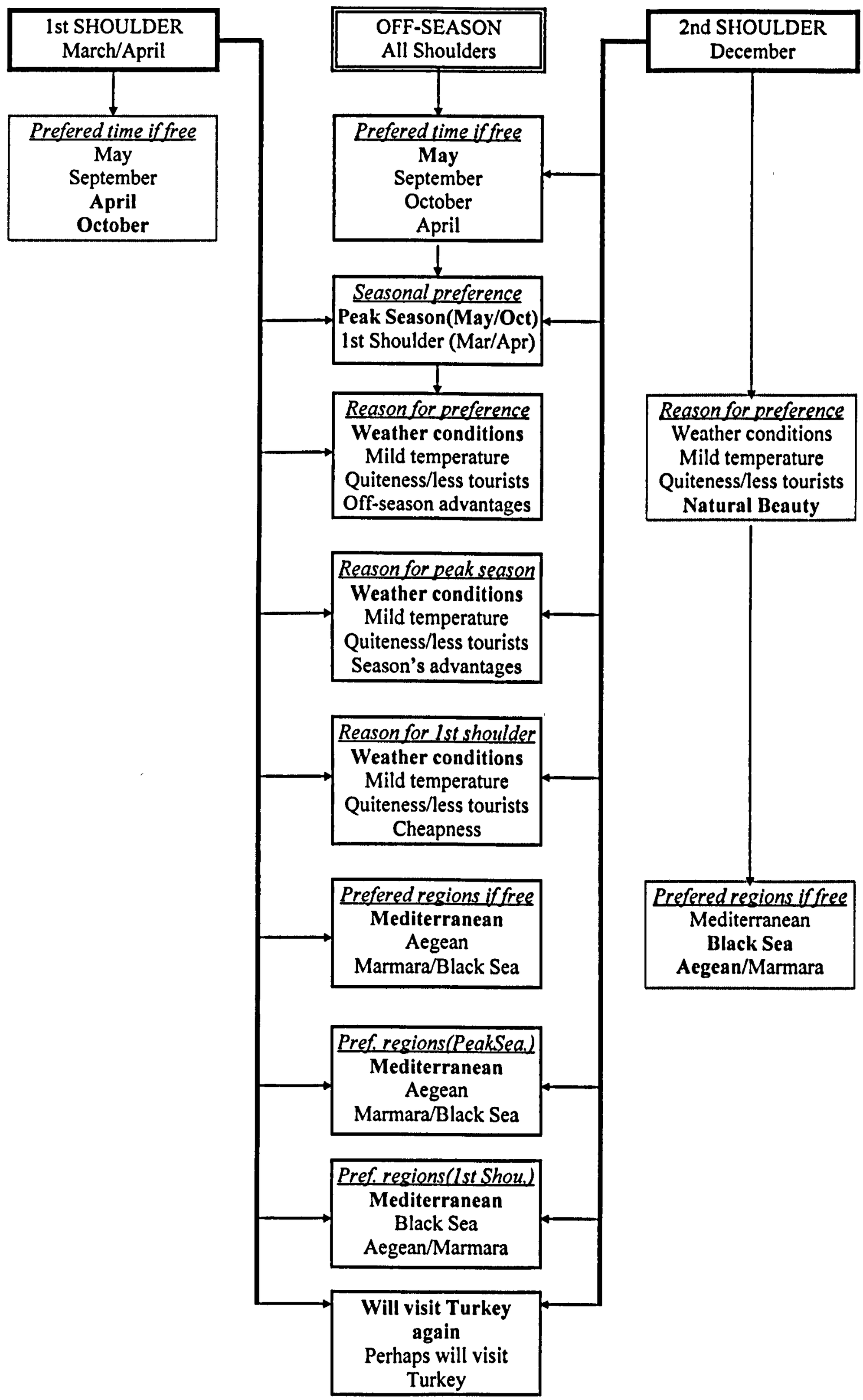


Figure 4.20 Overall visitors' seasonal, spatial preferences by destination
(*See also Appendix 106, 107, 108*)

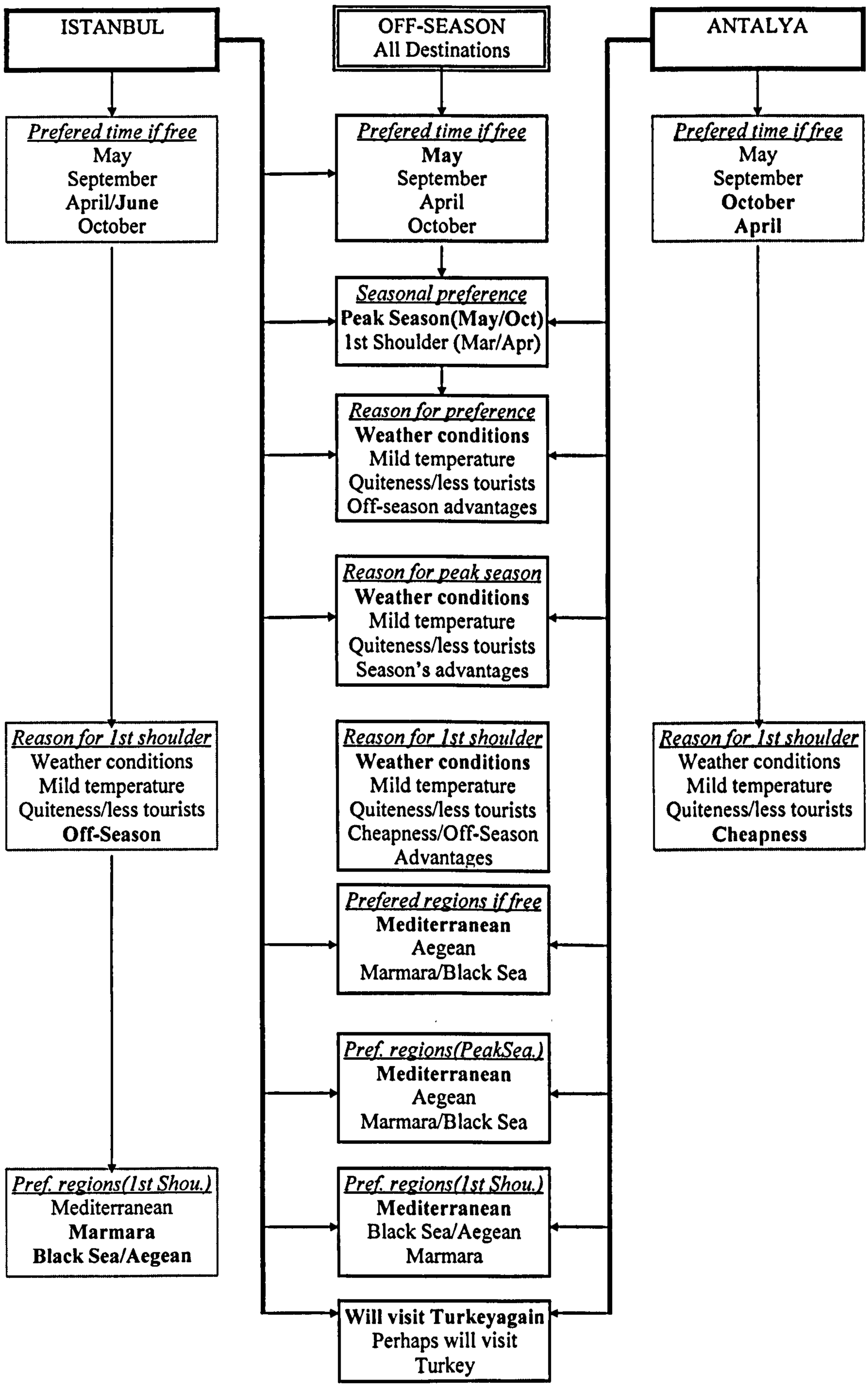


Figure 4.21 British visitors' seasonal, spatial preferences by destination
(*See also Appendix 106, 107, 108*)

OFF-SEASON **BRITISH** MARKET'S
TRAVEL PREFERENCES IF FREE TO CHOOSE **BY DESTINATION**

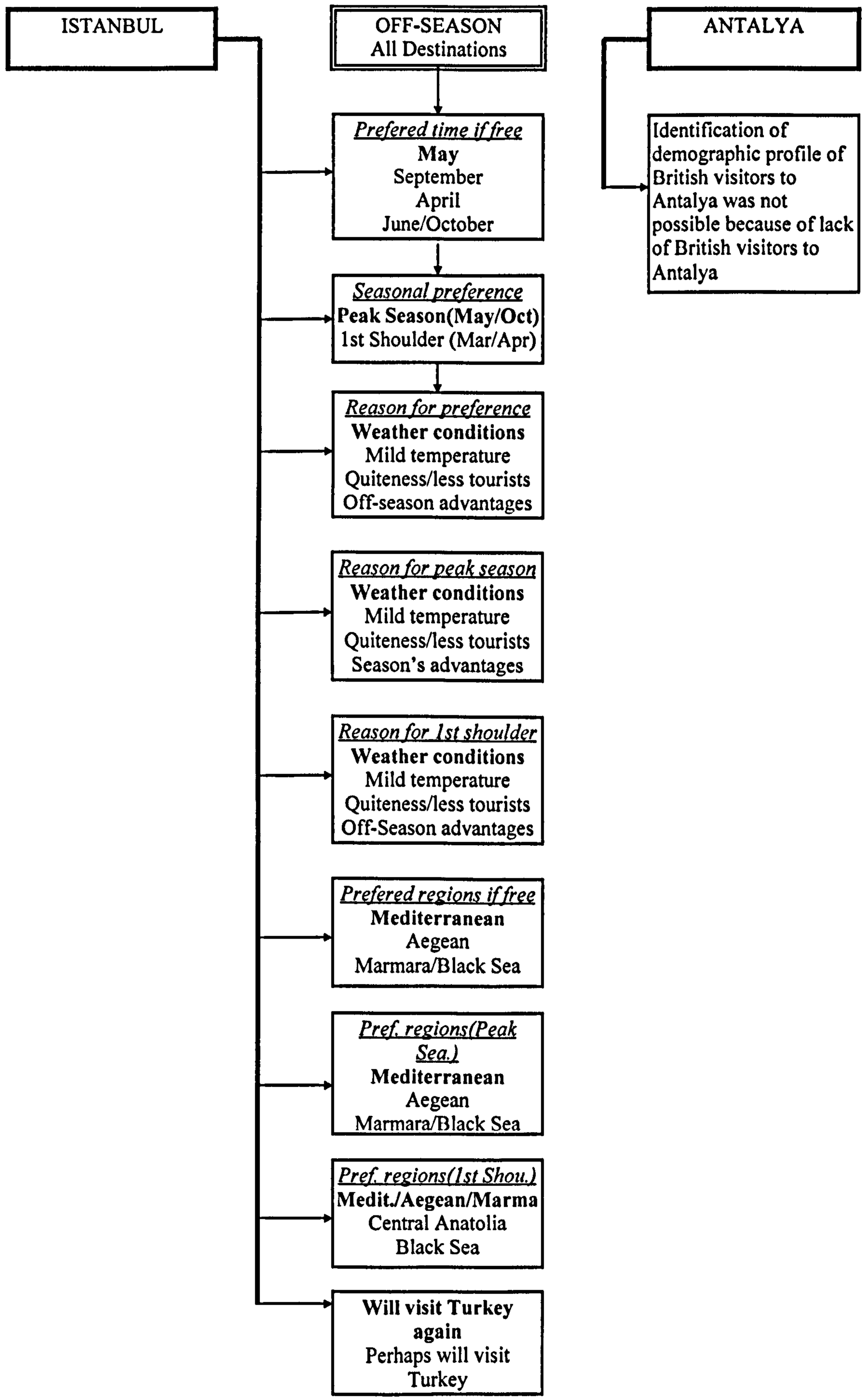
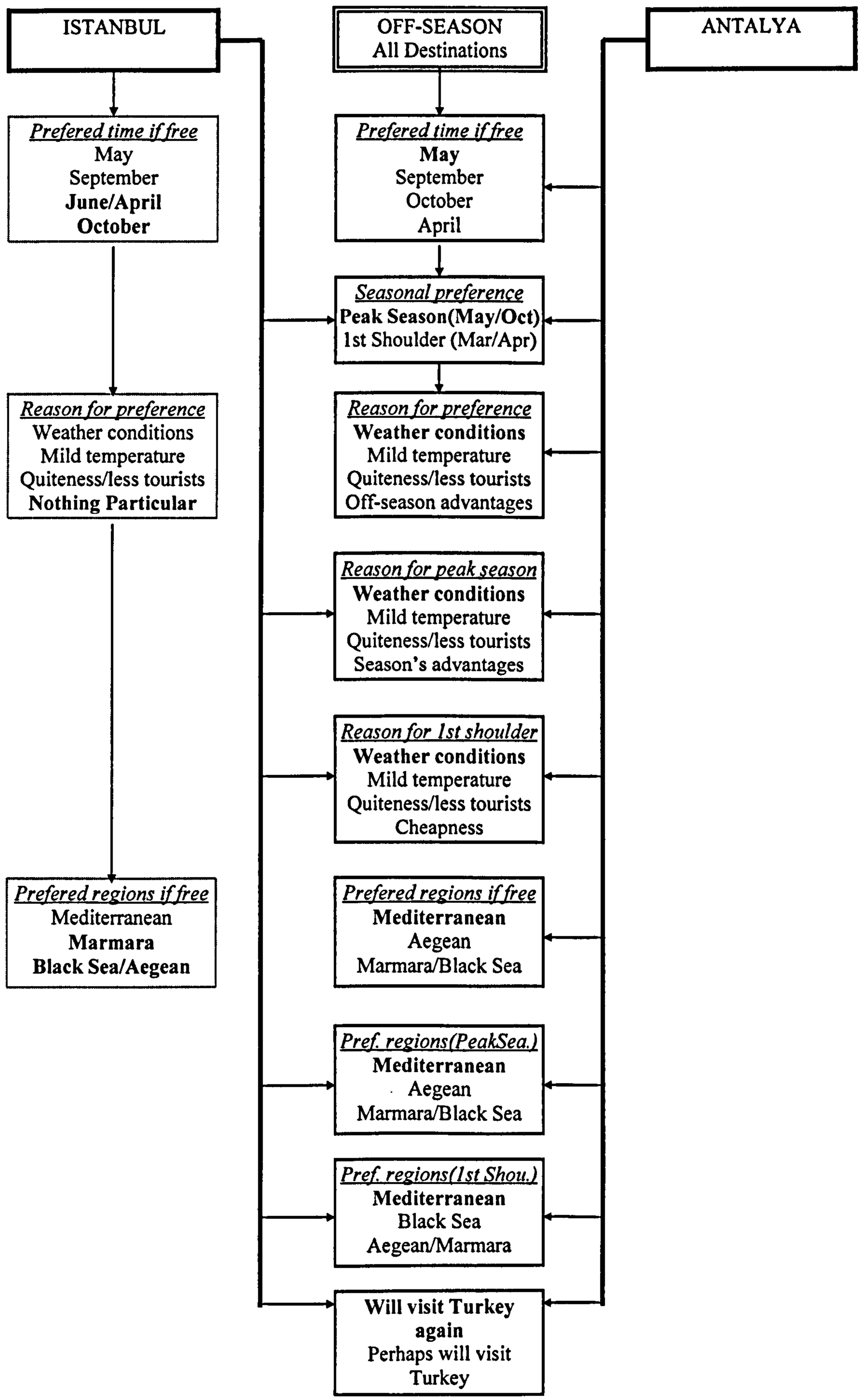


Figure 4.22 German visitors' seasonal, spatial preferences by destination
(*See also Appendix 106, 107, 108*)



4.4. Travel Organisation

Usage of travel agencies in travel organisation

Most popular ways of travel organisation were either organising travels completely or partly through travel agencies. However, organisation rate of travels by completely through travel agencies was significantly higher among German visitors, 78% compared to British visitors, 48%. The share of British visitors who organised their travel individually themselves and partly through travel agencies were higher than German visitors. (Table 4.110). First, the number of powerful German tour operators worldwide and provision of various travel choices at different levels of price for German travellers. Secondly the possibility is the limited number of tour operators in Britain which offer holidays in Turkey and their limited operation time in Turkey, usually May to October. Thirdly, as British visitors' purpose of visit varied and business occupied important place, they might have preferred individual organisation, and perhaps using travel agencies for buying tickets or booking accommodation only. On the other hand, because German visitors mainly visited Turkey for holiday/vacation and leisure purposes and holiday packages were offered at reasonable cheap prices, they might have preferred package tours rather than free, individual trips.

Table 4.110 Organisation of travel by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Completely through						
Travel agency	103	47.5	618	78.3	721	71.7
By myself	51	23.5	66	8.4	117	11.6
Partly through						
Travel agency	54	24.9	83	10.5	137	13.6
None of above	9	4.1	22	2.8	31	3.1
Total	217	100	789	100	1006	100
	N 1006 p= 0.00000 < 0.05 Missing: 72					

Although organisation of travel did not indicated significant differences, preference of British and German visitors in organising their travel showed some changes between shoulders (Table 4.111). While majority of British visitors used completely travel agencies in organisation of their travels in the first shoulder, importance of organisation of travels completely through travel agencies declined by 16% and individual travel organisation was preferred by British visitors in the second shoulder. In contrast, although more than three quarters of German visitors' travel were organised by completely by travel agencies in both shoulders, importance of individual organisation of travel in the first shoulder and importance of travel agencies in the second shoulder were greater. In summary, as explained in the previous section, travel organisation by completely through travel agencies more popular in Germany compared to Britain and more British visitors in the first shoulder and more German visitors in the second shoulder left the organisation of travel to professional travel agencies.

Table 4.111 Organisation of travel and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Completely through												
Travel agency	56	56.0	47	40.2	315	74.8	303	82.3	371	71.2	350	72.2
By myself	19	19.0	32	27.4	40	9.5	26	7.1	59	11.3	58	12.0
Partly through												
Travel agency	22	22.0	32	27.4	52	12.4	31	8.4	74	14.2	63	13.0
None of above	3	3.0	6	5.1	14	3.3	8	2.2	17	3.3	14	2.9
Total	100	100	117	100	421	100	368	100	521	100	485	100
	N 217 p=0.12966 >0.05				N 789 p=0.08497 >0.05				N 1006 p=0.91755 >0.05			

Table 4.112 Organisation of travel and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Complete. through												
Travel agency	101	47.2	2	66.7	131	58.0	487	86.5	232	52.7	489	86.4
By myself	50	23.4	1	33.3	42	18.6	24	4.3	92	20.9	25	4.4
Partly through												
Travel agency	54	25.2	-	-	38	16.8	45	8.0	92	20.9	45	8.0
None of above	9	4.2	-	-	15	6.6	7	1.2	24	5.5	7	1.2
Total	214	100	3	100	226	100	563	100	440	100	566	100
	N 217 p=0.74234 >0.05				N 789 p=0.00000< 0.05				N 1006 p=0.00000< 0.05			

Significant changes were recorded in German and overall visitors' choice of travel organisation. Comparison was not possible for British visitors as they visited only Istanbul (Table 4.112). Nearly half of British visitors' travel were organised completely by travel agencies, and the remaining visitors preferred organising their travel themselves, sometimes by involving travel agencies. German and overall visitors indicated almost same tendencies in Istanbul and Antalya. While 87% of German and overall visitors' travels were organised completely by travel agencies in Antalya, it was rather low, around 55%, in Istanbul.

The share of individual and travel organisation partly through travel agencies was higher in Istanbul. In short, overwhelming majority of travels to Antalya were organised by professional travel agencies, the shares of travel organisations completely through travel agencies, and individual and partly through travel agencies were almost fifty-fifty in Istanbul.

Table 4.113 Travel to Turkey by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
By tour	75	41.1	534	85.2	609	75.7
Individually	103	57.9	93	14.8	196	24.3
Total	178	100	627	100	805	100
	N 805 p= 0.00000 < 0.05					

Table 4.114 Travel to Turkey by nationality and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
By tour	31	41.9	44	42.3	251	81.2	283	89.0	282	73.6	327	77.5
Individually	43	58.1	60	57.7	58	18.8	35	11.0	101	26.4	95	22.5
Total	74	100	104	100	309	100	318	100	383	100	422	100
	N 178 p=0.95584 >0.05				N 627 p=0.00625< 0.05				N 805 p=0.20265 >0.05			

Table 4.115 Travel to Turkey by nationality and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
By tour	73	41.7	2	66.7	106	61.3	428	94.3	179	51.4	430	94.1
Individually	102	58.3	1	33.3	67	38.7	26	5.7	169	48.6	27	5.9
Total	175	100	3	100	173	100	454	100	348	100	457	100
	N 178 p=0.38547 >0.05				N 627 p=0.00000< 0.05				N 805 p=0.00000< 0.05			

Visitors' package-tour expenditures

Package tour expenditures concentrated between £100 and £400. More than 85% of overall visitors' package tour expenditures were under £400. Around 42% of overall and German visitors' package tour expenditures were between £100 and £200. On the contrary, most British visitors' expenditures were in higher group, between £200 and £300. The share of visitors who spent less than £300 for their package holidays were 80% for British visitors and 63% for German visitors. In other words, German visitors spend and/or pay more for package holidays compared to British visitors (Table161).

Except for British visitors' expenditures in Turkey by shoulder, visitors' expenditures while in Turkey and package tour expenditures by shoulder and by survey place indicated similar trends. For example, if expenditures while in Turkey decreased in second shoulder, the amount of money paid for package tour expenditures also indicated decline at the same period of time. In other words, a relationship was identified between expenditures made in Turkey and package tour expenditures. However, this relationship was not applicable to British visitors expenditures and package tour expenditures by shoulder.

Table 4.116 Package-Tour expenditures by nationality

	British		German		Total	
	n	%	*n*	%	*n*	%
£1 - £100	9	12.0	1	0.2	10	1.8
£101 - £200	23	30.7	206	42.9	229	41.3
£201 - £300	28	37.3	94	19.6	122	22.0
£301 - £400	8	10.7	106	22.1	114	20.5
£401 - £500	5	6.7	32	6.7	37	6.7
£501 - £1000	1	1.3	39	8.1	40	7.2
£1001 - £2000	1	1.3	1	0.2	2	.4
£2001 - £5000	-	-	1	0.2	1	.2
Total	n 75	100	n 480	100	n 555	100
	N 75		N 480		N 555	
	Case N) N 555 (Responses N) n 555 p= 0.000 cN and rN are equals as each respondent declared only one group of expenditure above					

Table 4.117 Package-Tour expenditures and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	n	%	n	%	n	%	n	%	n	%	n	%
£1 - £100	2	6.7	7	15.6	1	0.4	-	-	3	1.1	7	2.5
£101 - £200	6	20.0	17	37.8	35	14.4	171	72.2	41	15.0	188	66.7
£201 - £300	15	50.0	13	28.9	71	29.2	23	9.7	86	31.5	36	12.8
£301 - £400	5	16.7	3	6.7	76	31.3	30	12.7	81	29.7	33	11.7
£401 - £500	2	6.7	3	6.7	29	11.9	3	1.3	31	11.4	6	2.1
£501 - £1000	-	-	1	2.2	31	12.8	8	3.4	31	11.4	9	3.2
£1001 - £2000	-	-	1	2.2	-	-	1	0.4	-	-	2	0.7
£2001 - £5000	-	-	-	-	-	-	1	0.4	-	-	1	0.4
Total	30	100	45	100	243	100	237	100	273	100	282	100
	n 30		n 45		n 243		n 237		n 273		n 282	
	N 75 p=0.223 n 75				N 480 p=0.000 n 480				N 555 p=0.000 n 555			
	N No of cases (visitors) n No of responses											

According to Table 4.117, package tour expenditures significantly decreased in the second shoulder. It demonstrates either the easy availability of cheap, bargain travel offers or the low-income level of visitors in the second shoulder. The figures on visitors' income level, which did not indicate significant differences. Eventually, availability of numerous bargain holiday offers as well as some other unknown reasons played an important role in reduction of package tour expenditures in the second shoulder. This reduction in German and overall visitors' package tour expenditures in the second shoulder was much severe than British visitors' expenditures. While the share of British visitors who spent under £300 decreased by only 6% in the second shoulder, it was 38% decrease for German visitors and 37% decrease for overall visitors.

British visitors' package tour expenditures were a very low level in Istanbul. More than 80% of British, German and overall visitors' expenditures were under £300. That was reduced to around 58% in Antalya, and the share of visitors who spent more than £300 increased. Therefore, visitors to Antalya paid much higher for package tours than visitors to Istanbul. However, direct relationship between the length of stay and the cost of package holidays and its affects should not

be underestimated in these destinations. In addition, quality, features, types and price of accommodation facilities, number and frequency of flights to destination and competition between these suppliers also affect the price of package holidays. In this respect, Istanbul is more open to competition as a world city and choice of accommodation and airlines are much wider than in Antalya. Consequently, all these factors could be the reasons for lower package tour expenditures in Istanbul than Antalya (Table 4.118).

Table 4.118 Package-Tour expenditures and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
£1 - £100	9	12.3	-	-	1	1.0	-	-	10	5.8	-	-
£101 - £200	23	31.5	-	-	61	61.0	145	38.2	84	48.6	145	38.0
£201 - £300	28	38.4	-	-	18	18.0	76	20.0	46	26.6	76	19.9
£301 - £400	7	9.6	1	50.0	10	10.0	96	25.3	17	9.8	97	25.4
£401 - £500	4	5.5	1	50.0	1	1.0	31	8.2	5	2.9	32	8.4
£501 - £1000	1	1.4	-	-	7	7.0	32	8.4	8	4.6	32	8.4
£1001 - £2000	1	1.4	-	-	1	1.0	-	-	2	1.2	-	-
£2001 - £5000	-	-	-	-	1	1.0	-	-	1	0.6	-	-
Total	73	100	2	100	100	100	380	100	173	100	382	100
	N 73		N 2		N 100		N 380		N 173		N 382	
	N 75 p=0.106 n 75				N 480 p=0.000 n 480				N 555 p=0.000 n 555			
	N No of cases (visitors) n No of responses											

Travel booking time

Although it did not show important differences by nationality and by destination, travel-booking time indicated significant differences between shoulders. While more than one quarter of overall visitors booked their travel 3-4 weeks before departure, on average 20% of them bought their holidays only one week or less, two weeks and five to eight weeks before departure. Only 11% of overall visitors booked their travels nine weeks and over before their travel starts. It was worth noting that 23% of overall visitors booked their travels in less than one-week time to departure which shows the significance of last-minute, special, cheap and bargain travel offers which mainly German visitors were attracted by. British visitors preferred booking their travels long time before departure which was generally five weeks and more compared to German visitors who often booked their travels closer to departure date which was four weeks and less. 63% of British visitors and 70% German visitors booked their holidays in a month before departure date (Table 4.119).

Table 4.119 Travel booking time by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
1 week or less	30	15.3	187	24.4	217	22.5
2 weeks ago	47	24.0	153	19.9	200	20.8
3-4 weeks ago	47	24.0	197	25.7	244	25.3
5-8 weeks ago	43	21.9	149	19.4	192	19.9
9-12 weeks ago	14	7.1	45	5.9	59	6.1
over 13 weeks	15	7.7	36	4.7	51	5.3
Total	196	100	767	100	963	100
	N 963 p= 0.06000 >0.05 Missing: 115					

Table 4.120 Travel booking time and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
1 week or less	15	16.9	15	14.0	118	28.9	69	19.2	133	26.8	84	18.0
2 weeks ago	15	16.9	32	29.9	96	23.5	57	15.9	111	22.3	89	19.1
3-4 weeks ago	16	18.0	31	29.0	94	23.0	103	28.7	110	22.1	134	28.8
5-8 weeks ago	25	28.1	18	16.8	53	13.0	96	26.7	78	15.7	114	24.5
9-12 weeks ago	7	7.9	7	6.5	26	6.4	19	5.3	33	6.6	26	5.6
over 13 weeks	11	12.4	4	3.7	21	5.1	15	4.2	32	6.4	19	4.1
Total	89	100	107	100	408	100	359	100	497	100	466	100
	N 196 p=0.01689< 0.05				N 767 p=0.00000< 0.05				N 963 p=0.00010< 0.05			

Significant differences were recorded in booking preference of visitors between shoulders (Table 4.120). While majority of first shoulder visitors preferred booking their travels either two weeks and less or nine weeks and more before departure, second shoulder visitors were in favour of booking their travels at a time in the middle range between three weeks to eight weeks. The share of visitors who booked their travels in less than one week before departure was rather high in the first shoulder compared to second shoulder which was mainly resulted from German visitors preference of late booking or German travel companies' attractive late offers. Against 52% in the first shoulder, as high as 73% of British visitors booked their travel four weeks and less before departure in the second shoulder. The reasons for this change are not known but it could probably the bargain offers towards the off-season and high volume of business, conference and exhibitions in Turkey in the second shoulder. In contrast, decrease was seen in the share of German visitors who booked their travels four weeks and less before departure from 75% in the first shoulder to 64% in the second shoulder.

Visitors' preference of travel booking time did not indicate significant differences by destination province. However, one week or less booking time in Antalya and five to eight weeks booking time were more popular in Istanbul. On the other hand, German visitors were late travel bookers compared to British visitors. While 16% of British visitors to Istanbul booked their travel less than one week before departure, it was 22% and 25% for German visitors in Istanbul and Antalya respectively. German travel bookings to Antalya were realised particularly in two weeks before

travel and travels to Istanbul booked in the middle range time period from 3 weeks to eight weeks before. As a consequence, it can be said that while majority of bookings to Istanbul were made between 3 weeks and eight weeks before departure, visitors to Antalya who were German preferred particularly late, two weeks and less, and middle range booking (Table 4.121).

Table 4.121 Travel booking time and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
1 week or less	30	15.5	-	-	46	22.3	141	25.1	76	19.0	141	25.0
2 weeks ago	47	24.4	-	-	36	17.5	117	20.9	83	20.8	117	20.7
3-4 weeks ago	46	23.8	1	33.3	56	27.2	141	25.1	102	25.6	142	25.2
5-8 weeks ago	42	21.8	1	33.3	47	22.8	102	18.2	89	22.3	103	18.3
9-12 weeks ago	13	6.7	1	33.3	12	5.8	33	5.9	25	6.3	34	6.0
over 13 weeks	15	7.8	-	-	9	4.4	27	4.8	24	6.0	27	4.8
Total	193	100	3	100	206	100	561	100	399	100	564	100
	N 196 p=0.46043 >0.05				N 767 p=0.65005 >0.05				N 963 p=0.27890 >0.05			

Respondents' companions

Chi-square analysis was not available to compute statistical significance level between two nations in terms of whether they travelled alone or they had companions. However, some important differences were observed between German and British visitors. As seen on (Table 4.122). Total column percentages indicate that most visitors travel either alone or with their husband/wife, friends and relatives, and partners (boy/girl-friends). In average, 36% of all visitors travelled with their wife/husband, 20% with their friends and relatives, and 11% with their boy/girl-friend while 17% visited Turkey alone. They did not show significant changes between shoulders. Visitors who travelled with their husband/wife form the major group in the survey. Therefore, visitors travelling with their husband/wife appeared to be the most important market segment in both shoulders.

The share of British alone visitors, visitors travelling with their colleagues and in particular, British visitors with their partners (boy/girl-friend) in total showed increase in the second shoulder, while others' share decreased. While British visitors travelling with their husband/wife were in majority in the first shoulder (35%), alone visitors occupied the first rank in the second shoulder (33%). British visitors who travels with their husband/wife, friends and relatives, colleagues, partners, and alone visitors were identified as primary British market segments by companion groups in both shoulders. 385% increase in the share of visitors travelling with their boy/girl-friend in the second shoulder was also worth noting.

German visitors indicated some different changes between shoulders. The share of German visitors travelling with their husband/wife, colleagues, and partners (boy/girl-friend) in total showed increase in the second shoulder. While the share of alone German visitors decreased from 14% to

13% in the second shoulder, the share of visitors travelling with their husband/wife increased from 35% to 40% which were the major deviations from the changes of British visitors. German visitors who travels with their husband/wife, friends and relatives, partners and alone visitors were identified as primary German market segments in both shoulders (Table 4.122).

Table 4.122 Respondents' companions and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	n	%	n	%	n	%	n	%	n	%	n	%
Alone	32	29.1	41	32.8	66	14.1	53	13.1	98	17.0	94	17.7
HusbandWifeChild	3	2.7	3	2.4	24	5.1	9	2.2	27	4.7	12	2.3
Husband&Wife	38	34.5	38	30.4	161	34.5	162	39.9	199	34.5	200	37.7
Children	3	2.7	2	1.6	14	3.0	8	2.0	17	2.9	10	1.9
Parents	4	3.6	3	2.4	23	4.9	9	2.2	27	4.7	12	2.3
Colleagues	11	10.0	9	7.2	18	3.9	19	4.7	29	5.0	28	5.3
Friends&Relatives	16	14.5	16	12.8	107	22.9	85	20.9	123	21.3	101	19.0
Partner Boy/G. Fri.	3	2.7	13	10.4	51	10.9	54	13.3	54	9.4	67	12.6
Tour group	-	-	-	-	1	0.2	4	1.0	1	0.2	4	0.8
None of Above	-	-	-	-	2	0.4	3	0.8	2	0.3	3	0.6
Total	110	100	125	100	467	100	406	100	577	100	531	100
	N 229 n 235 p=0.369				N 832 n 873 p=0.087				N 1061 n 1108 p=0.048			
	N Number of cases n Number of responses											

Table 4.123 shows the differences between the two nations in terms of their companions. A large difference stroke on eye in the share of alone British and German visitors in the first shoulder as well as in the second shoulder. While the share of alone British visitors was around 30%, alone German visitors' share in total was about 15% in both shoulders. It is interesting to see that the shares of British and German visitors who travelled with their husband/wife were identical in the first shoulder (35%). However, it changed in favour of German visitors in the second shoulder and 30% British and 40% German visitors travelled to Turkey with their husband/wife. More British visitors travelled with their colleagues than German visitor in both shoulders, as they visited Istanbul and usually for business purposes. On the other hand, more German visitors travelled with their friends and relatives compared to British visitors in both shoulders. German visitors travelling with their partners (boy/girl-friend) were in majority compared to British visitors, although the difference was lesser in the second shoulder.

In general, Alone visitors and visitors travelling with their husband/wife, friends and relatives in both British and German markets, and British visitors travelling with their colleagues, and German visitors travelling with their boy/girl-friends were important observed segments in the first shoulder. British visitors travelling with their partners were added to the important segments in second shoulder (Table 4.123).

Table 4.123 Respondents' companions and shoulder season by nationality

	1st shoulder				2nd shoulder				Total			
	British		German		British		German		British		German	
	n	%	n	%	n	%	n	%	n	%	n	%
Alone	32	29.1	66	14.1	41	32.8	53	13.1	73	31.1	119	13.6
HusbandWifeChild	3	2.7	24	5.1	3	2.4	9	2.2	6	2.6	33	3.8
Husband&Wife	38	34.5	161	34.5	38	30.4	162	39.9	76	32.3	323	37.0
Children	3	2.7	14	3.0	2	1.6	8	2.0	5	2.1	22	2.5
Parents	4	3.6	23	4.9	3	2.4	9	2.2	7	3.0	32	3.7
Colleagues	11	10.0	18	3.9	9	7.2	19	4.7	20	8.5	37	4.2
Friends&Relatives	16	14.5	107	22.9	16	12.8	85	20.9	32	13.6	192	22.0
Partner Boy/G. Fri.	3	2.7	51	10.9	13	10.4	54	13.3	16	6.8	105	12.0
Tour group	-	-	1	0.2	-	-	4	1.0	-	-	5	0.6
None of Above	-	-	2	0.4	-	-	3	0.7	-	-	4	0.5
Total	110	100	467	100	125	100	406	100	235	100	873	100
	N 556 n 577 p=0.001				N 505 n 531 p=0.000				N 1061 n 1108 p=0.000			
	N Number of cases n Number of responses											

Table 4.124 shows that some clear differences exist between visitors in Istanbul and Antalya in terms of their companions. The superiority of alone visitors (28%) and visitors travelling with their colleagues (8%) in Istanbul and visitors with their husband/wife and with their boy/girl-friend stroke on eye in Antalya. While the first three ranks were occupied by, visitors with their husband/wife (31%), alone visitors (28%) and visitors with their friends and relatives (19) in Istanbul, the same ranks were occupied by visitors with their husband/wife (40%), friends and relatives (21%) and visitors with their boy/girl-friends (15%) in Antalya respectively. More than 90% of visitors visited Antalya with companion compared to visitors in Istanbul (72%).

Table 4.124 Respondents' companions and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
Alone	70	30.3	3	75.0	n	%	n	%	133	27.7	59	9.4
HusbandWifeChild	6	2.6	-	-	63	25.2	56	9.0	10	2.1	29	4.6
Husband&Wife	75	32.5	1	25.0	4	1.6	29	4.7	149	31.0	250	39.9
Children	5	2.2	-	-	74	29.6	249	40.0	13	2.7	14	2.2
Parents	7	3.0	-	-	8	3.2	14	2.2	13	2.7	26	4.1
Colleagues	20	8.7	-	-	6	2.4	26	4.2	39	8.1	18	2.9
Friends&Relatives	32	13.9	-	-	19	7.6	18	2.9	90	18.7	134	21.4
Partner Boy/G. Fri.	16	6.9	-	-	58	23.2	134	21.5	28	5.8	93	14.8
Tour group	-	-	-	-	12	4.8	93	14.9	5	1.0	-	-
None of Above	-	-	-	-	5	2.0	-	-	1	0.2	4	0.7
Total	231	100	4	100	1	0.4	4	0.7	481	100	627	100
	N 229 n 235 p=0.794				N 832 n 873 p=0.000				N 1061 n 1108 p=0.000			
	N Number of cases n Number of responses											

Some clear differences also identified in destination preferences of German visitors in Istanbul and Antalya in terms of their companions, although it was not possible to compare British visitors between these two provinces. There were great differences between alone visitors, visitors with their husband/wife, husband/wife/children, parents, colleagues, partners (boy/girl-friends) in

Istanbul and Antalya. The important segments were identified as British and German visitors with their husband/wife, alone visitors and visitors with their friends/relatives for Istanbul, German visitors with their husband/wife, friends/relatives and partners (boy/girl-friends) for Antalya. While as high as 91% of German visitors visited Antalya with companion, 75% of German visitors and even lesser 70% of British visitors travelled to Istanbul with companion (Table 4.124).

Table 4.125 shows the differences between the two nations in terms of their companions by place of visit. No large differences were observed between British and German visitors in Istanbul. Only visitors travelling with their friends and relatives and visitors travelling alone indicated differences. While the share of alone British visitors was around 30%, alone German visitors' share in total was about 25% Istanbul. On the other hand, more German visitors travelled with their friends and relatives in Istanbul (23%) compared to British visitors (14%).

Table 4.125 Respondents' companions and survey place by nationality

	Istanbul				Antalya				Total			
	British		German		British		German		British		German	
	n	%	n	%	n	%	n	%	n	%	n	%
Alone	70	30.3	63	25.2	3	75.0	56	9.0	73	31.1	119	13.6
HusbandWifeChild	6	2.6	4	1.6	-	-	29	4.7	6	2.6	33	3.8
Husband&Wife	75	32.5	74	29.6	1	25.0	249	40.0	76	32.3	323	37.0
Children	5	2.2	8	3.2	-	-	14	2.2	5	2.1	22	2.5
Parents	7	3.0	6	2.4	-	-	26	4.2	7	3.0	32	3.7
Colleagues	20	8.7	19	7.6	-	-	18	2.9	20	8.5	37	4.2
Friends&Relatives	32	13.9	58	23.2	-	-	134	21.5	32	13.6	192	22.0
Partner Boy/G. Fri.	16	6.9	12	4.8	-	-	93	14.9	16	6.8	105	12.0
Tour group	-	-	5	2.0	-	-	-	-	-	-	5	0.6
None of Above	-	-	1	0.4	-	-	4	0.7	-	-	4	0.5
Total	231	100	250	100	4	100	623	100	235	100	873	100
	N 468 n 481 p=0.043				N 593 n 627 p=0.007				N 1061 n 1108 p=0.000			
	N Number of cases n Number of responses											

Number of companions

No statistically significant differences were observed between two shoulders in terms of number of companions. However, some differences were observed between German and British visitors. As seen on Table 4.126, total column percentages indicate that most visitors travel with only one companion in both shoulders. In average, 79% of all visitors travelled with only one companion, 10% with two companions, and 5% with three companions while only 6% visited Turkey with four or more companions. The number of companions did not show significant changes between shoulders. Visitors travelling with only one companion appeared to be the most important market segment in both shoulders.

While the share of British visitors with one companion decreased, the share of visitors with two or more companions indicated increase in the second shoulder. British visitors primarily with one

companion and secondarily visitors with two and three companions were identified as British important market segments by companion groups in both shoulders. German visitors did not indicate significant changes between shoulders. The share of German visitors travelling with one companion remained almost same in both shoulders. While German visitors with one companion were identified as primary and visitors with two and three companions were found as secondary important German market segments in terms of number of companion in both shoulders (Table 4.126).

Table 4.126 Number of respondents' companions (group size) and nationality by shoulder season

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
One	63	90.0	64	81.0	277	77.4	244	77.0	340	79.4	308	77.8
Two	2	2.9	6	7.6	38	10.6	37	11.7	40	9.3	43	10.9
Three	3	4.3	6	7.6	20	5.6	15	4.7	23	5.4	21	5.3
Four	1	1.4	1	1.3	9	2.5	6	1.9	10	2.3	7	1.8
Five	0	-	1	1.3	5	1.4	6	1.9	5	1.2	7	1.8
Six - Thirty	1	1.4	1	1.3	9	2.5	9	2.9	10	2.3	10	2.6
Total	70	100	79	100	358	100	317	100	428	100	396	100
	N 149 p=0.62688 >0.05				N 675 p=0.92642 >0.05				N 824 p=0.89673 >0.05			

Table 4.127 shows that no significant differences exist between the two nations in both shoulders in terms of number of their companions. Important differences stroke on eye in the share of British and German visitors with one and two companions in the first shoulder. The differences were narrower in the second shoulder. While the share British visitors with one companion was higher (90%) compared to German visitors (77) in the first shoulder, the share of German visitors with two companions in total was about 11% which was rather higher than British visitors' share (3%).

The differences were lesser between two nations in the second shoulder. British visitors with one companion were still higher in the second shoulder (81%) compared to German visitors (77%), but the difference was narrower between the two nations. On the other hand while the share of German visitors with two companions (12%) was more than British visitors (8%), the share of British visitors with three companions (8%) was superior compared to German visitors (5%). It was observed that British visitors' share with more than one companion increased from 10% in the first shoulder to 19% in the second shoulder, German visitors' share remained almost same around 77%.

In general, importance of visitor segments by number of companions was ranked orderly from one companion to thirty companions. In parallel to the increase in number of companions, the share of visitors with more companions decreases in both shoulders. Therefore, British as well as German visitors with one companion were important segments in both shoulders (Table 4.127).

Table 4.127 Number of respondents' companions (group size) and shoulder season by nationality

	1st shoulder				2nd shoulder				Total			
	British		German		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
One	63	90.0	277	77.4	64	81.0	244	77.0	127	85.2	521	77.2
Two	2	2.9	38	10.6	6	7.6	37	11.7	8	5.4	75	11.1
Three	3	4.3	20	5.6	6	7.6	15	4.7	9	6.0	35	5.2
Four	1	1.4	9	2.5	1	1.3	6	1.9	2	1.3	15	2.2
Five	-	-	5	1.4	1	1.3	6	1.9	1	0.7	11	1.6
Six - Thirty	1	1.4	9	2.5	1	1.3	9	2.9-	2	1.3	18	2.7
Total	70	100	358	100	79	100	317	100	149	100	675	100
	N 428 p=0.31985 >0.05				N 396 p=0.72982 >0.05				N 824 p=0.22533 >0.05			

(Table 4.128) shows that no clear differences exist between visitors in Istanbul and Antalya in terms of the number of companions (p=0.03057). The visitors with one companion were the biggest group in both provinces, in particular in Antalya (80%). However, superiority of visitors with more than three or more companions was observed in Istanbul (13%).

In contrast to the overall visitors, important differences were identified in destination preferences of German visitors in Istanbul and Antalya in terms of the number or their companions, although it was not possible to compare British visitors between these two provinces. While the share of German visitors with one companion in total was greater in Antalya (80%), German visitors' share with two or more companions were higher in Istanbul (31%) compared to Antalya. The British visitors with one companion significantly higher in Istanbul (85%) compared to German visitors in Istanbul as well as Antalya. The important segments were identified as British visitors with one companion in Istanbul and German visitors with one companion in Antalya and both British and German visitors with two and three companions in both provinces (Table 4.128).

Table 4.128 Number of respondents' companions (group size) and nationality by survey place

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
One	126	85.1	1	100	114	69.5	407	79.6	240	76.9	408	79.7
Two	8	5.4	-	-	23	14.0	52	10.2	31	9.9	52	10.2
Three	9	6.1	-	-	8	4.9	27	5.3	17	5.4	27	5.3
Four	2	1.4	-	-	6	3.7	9	1.8	8	2.6	9	1.8
Five	1	0.7	-	-	4	2.4	7	1.4	5	1.6	7	1.4
Six - Thirty	2	1.4	-	-	9	5.5	9	1.8	11	3.6	9	1.8
Total	148	100	1	100	164	100	511	100	312	100	512	100
	N 149 p=0.99936 >0.05				N 675 p=0.03057< 0.05				N 824 p=0.52785 >0.05			

Table 4.129 indicates that significant differences exists between the two nations in terms of the number of companions in Istanbul (p=0.01409). While as high as 85% of British visitors visited Istanbul with only one companion, it came down to 80% of German visitors in Antalya and even lesser 70% of German visitors in Istanbul. On the other hand, more German visitors travelled with

two or more companions in Istanbul (31%) and in Antalya (20%) compared to British visitors (15%) in Istanbul. In summary, British and German visitors with one companion were identified as primary target market segment in both provinces. However, German visitors with two or more companions were observed as the secondary important segment for both provinces.

Table 4.129 Number of respondents' companions (group size) and survey place by nationality

	Istanbul				Antalya				Total			
	British		German		British		German		British		German	
	N	%	N	%	N	%	N	%	N	%	N	%
One	126	85.1	114	69.5	1	100	407	79.6	127	85.2	521	77.2
Two	8	5.4	23	14.0	-	-	52	10.2	8	5.4	75	11.1
Three	9	6.1	8	4.9	-	-	27	5.3	9	6.0	35	5.2
Four	2	1.4	6	3.7	-	-	9	1.8	2	1.3	15	2.2
Five	1	0.7	4	2.4	-	-	7	1.4	1	0.7	11	1.6
Six - Thirty	2	1.4	9	5.5	-	-	9	1.8	2	1.3	18	2.7
Total	148	100	164	100	1	100	511	100	149	100	675	100
	N 312 p=0.01409< 0.05				N 512 p=0.99968 >0.05				N 824 p=0.22533 >0.05			

Second holiday taking habits

The Tables 175 - 177 demonstrate more than 80% of all British, German and overall visitors do take second holidays in a year. The share of visitors who take second holidays did not indicate differences neither by nationality nor by shoulder and by destination. Their share was almost same and around 80% in both shoulders and in both destinations. Therefore, it can be said that both 80% of all British and German visitors do take second holidays.
OK why make a section devoted to this?

Current travel as second or first holiday

Although, the share of visitors whose this visit was second holidays did not indicate significant differences by nationality and by destination, expectedly it showed important changes between shoulders (Table 4.130). This visit was second holiday of around 50% overall visitors. However, British visitors' share whose this visit was their second holiday was 6% more than German visitors. Therefore p value did not indicate significant differences between two nations.

Table 4.130 Current travel as second or first holiday by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Yes	100	54.9	335	49.3	435	50.5
No	82	45.1	345	50.7	427	49.5
Total	182	100	680	100	862	100
	N 862 p= 0.17341 >0.05 Missing: 216					

Table 4.131 Current travel as second or first holiday and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Yes	39	43.8	61	65.6	92	25.0	243	77.9	131	28.7	304	75.1
No	50	56.2	32	34.4	276	75.0	69	22.1	326	71.3	101	24.9
Total	89	100	93	100	368	100	312	100	457	100	405	100
	N 182 p=0.00317< 0.05				N 680 p=0.00000< 0.05				N 862 p=0.00000< 0.05			

As expected, the share of second shoulder visitors whose visit was their second holiday was significantly high in the shoulder. Against only 29% overall visitors in the first shoulder, 75% of visitors in the second stated that it was their second holiday in that year. Compared to German visitors in first shoulder, share of second time holiday taking British visitors in first shoulder was higher. While the difference between second time holiday taking visitors in first and second shoulder was narrower, 22%, the share of German visitors whose visit was their second holiday indicated as high as 53% increase in the second shoulder (Table 4.131).

Table 4.132 Current travel as second or first holiday and place of visit by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Yes	99	54.7	1	100	88	48.1	247	49.7	187	51.4	248	49.8
No	82	45.3	-	-	95	51.9	250	50.3	177	48.6	250	50.2
Total	181	100	1	100	183	100	497	100	364	100	498	100
	N 182 p=0.36386 >0.05				N 680 p=0.70944 >0.05				N 862 p=0.64792 >0.05			

Second time holiday taking visitors did not indicate important difference between Istanbul Antalya. In average, 50% of all British, German and overall visitors' visit to Istanbul and Antalya was their second holidays in that year (Table 4.132). It was important to identify that more than half of the visitors' visit to Turkey was their second holiday. Promotion activities can be arranged and organised to attract more second time holiday takers to these destinations (Figure 4.23, 4.24, 4.25, 4.26, 4.27, 4.28 and Appendix 109, 110, 111).

Figure 4.23 Travel organisation characteristics of overall visitors by shoulder

(*See also Appendix 109, 110, 111*)

OVERALL OFF-SEASON MARKET'S
TRAVEL ORGANISATION CHARACTERISTICS **BY SHOULDER**

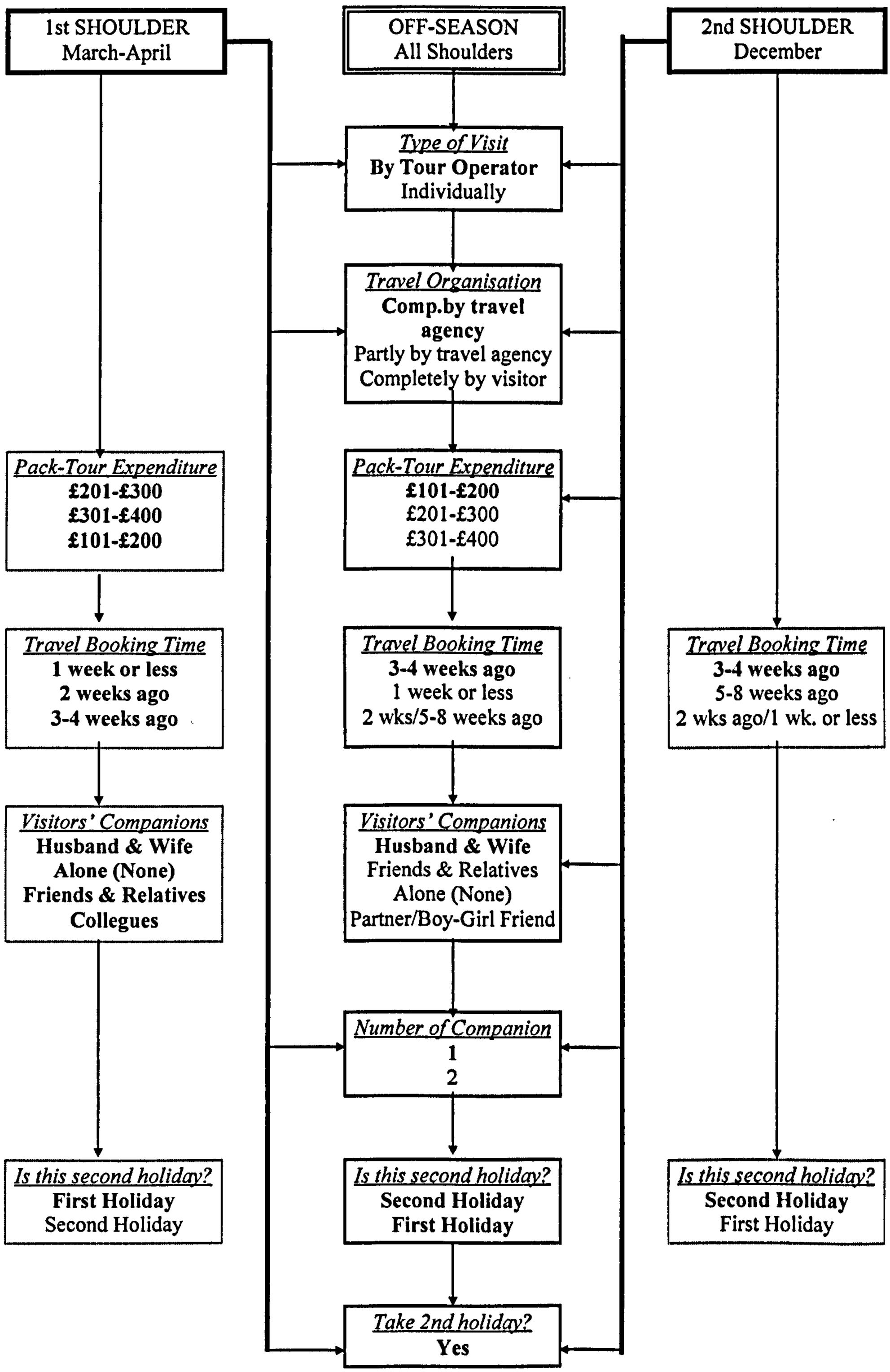


Figure 4.24 Travel organisation characteristics of British visitors by shoulder

(See also Appendix 109, 110, 111)

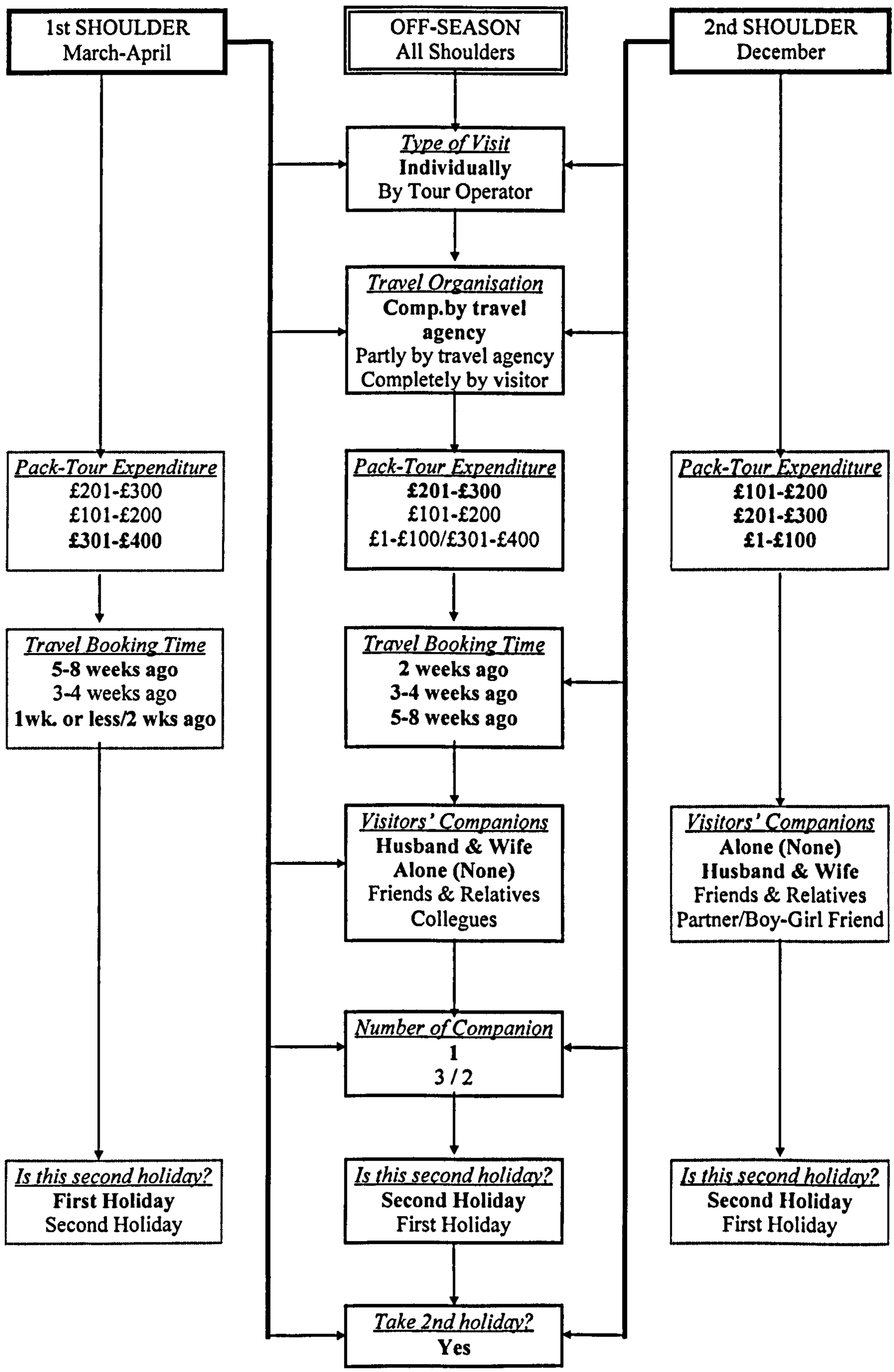


Figure 4.25 Travel organisation characteristics of German visitors by shoulder

(See also Appendix 109, 110, 111)

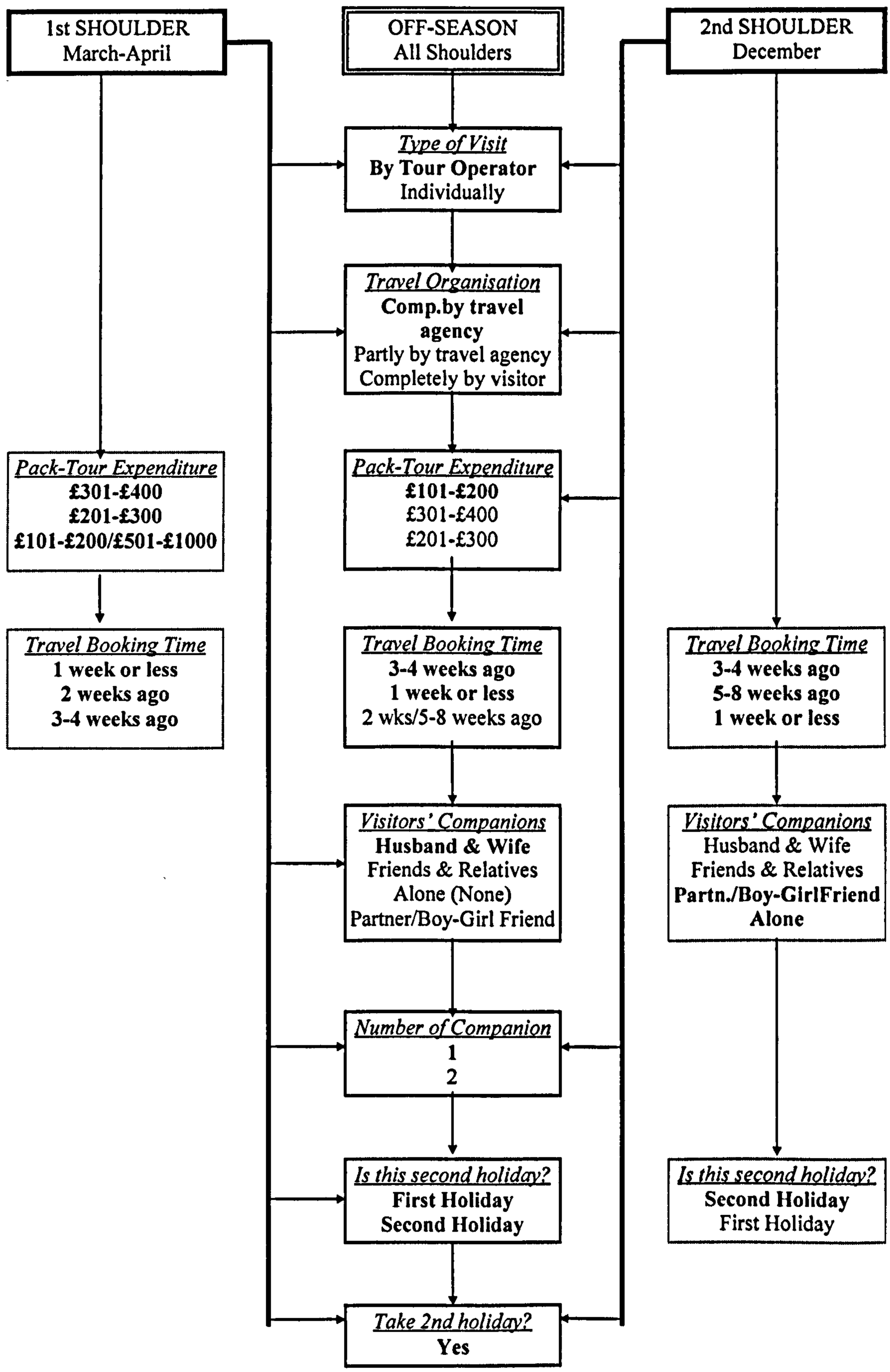


Figure 4.26 Travel organisation characteristics of overall visitors by destination

(*See also Appendix 109, 110, 111*)

OVERALL OFF-SEASON MARKET'S TRAVEL ORGANISATION CHARACTERISTICS BY DESTINATION

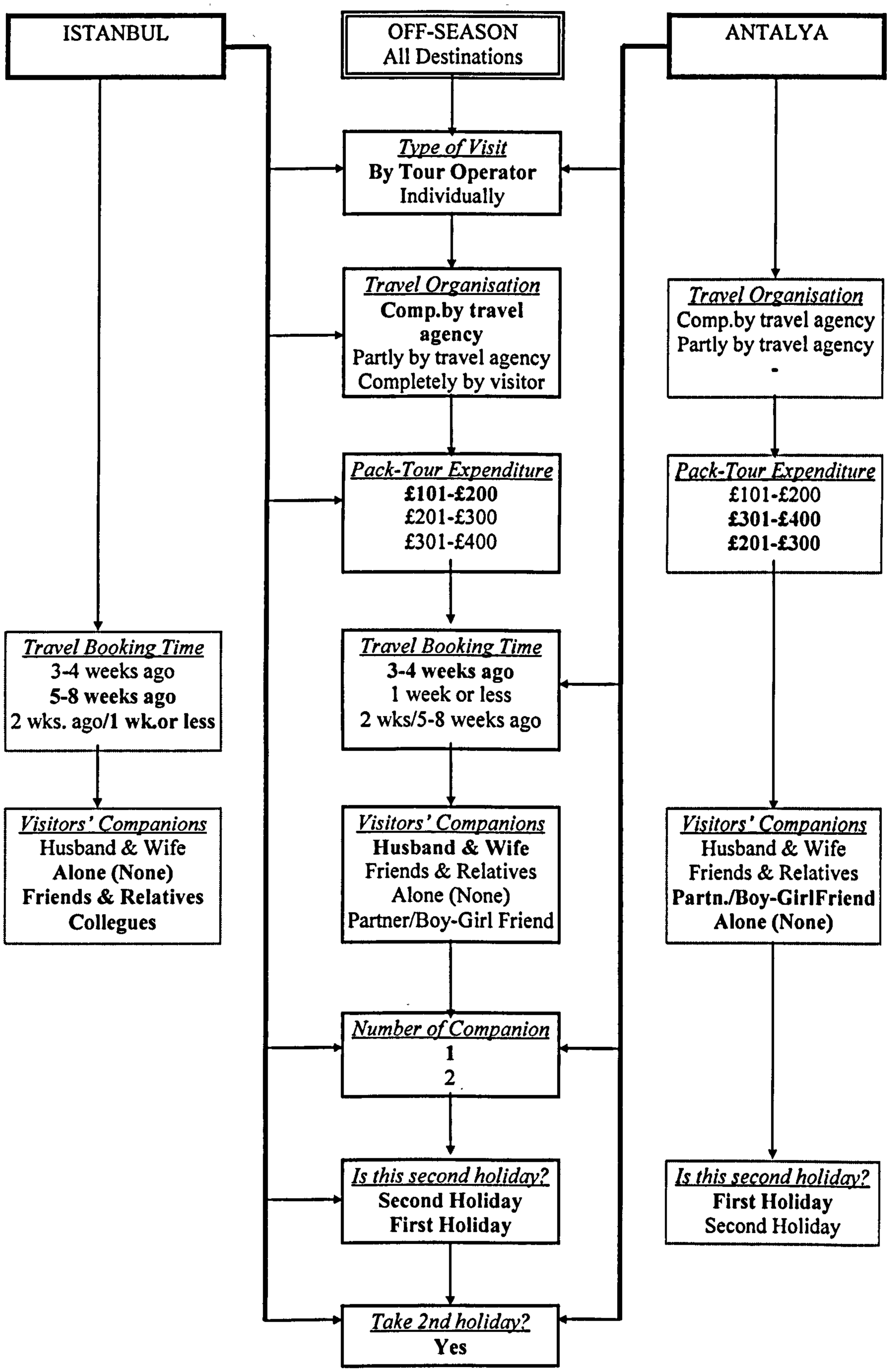


Figure 4.27 Travel organisation characteristics of British visitors by destination

(See also Appendix 109, 110, 111)

OFF-SEASON **BRITISH** MARKET'S TRAVEL ORGANISATION CHARACTERISTICS **BY DESTINATION**

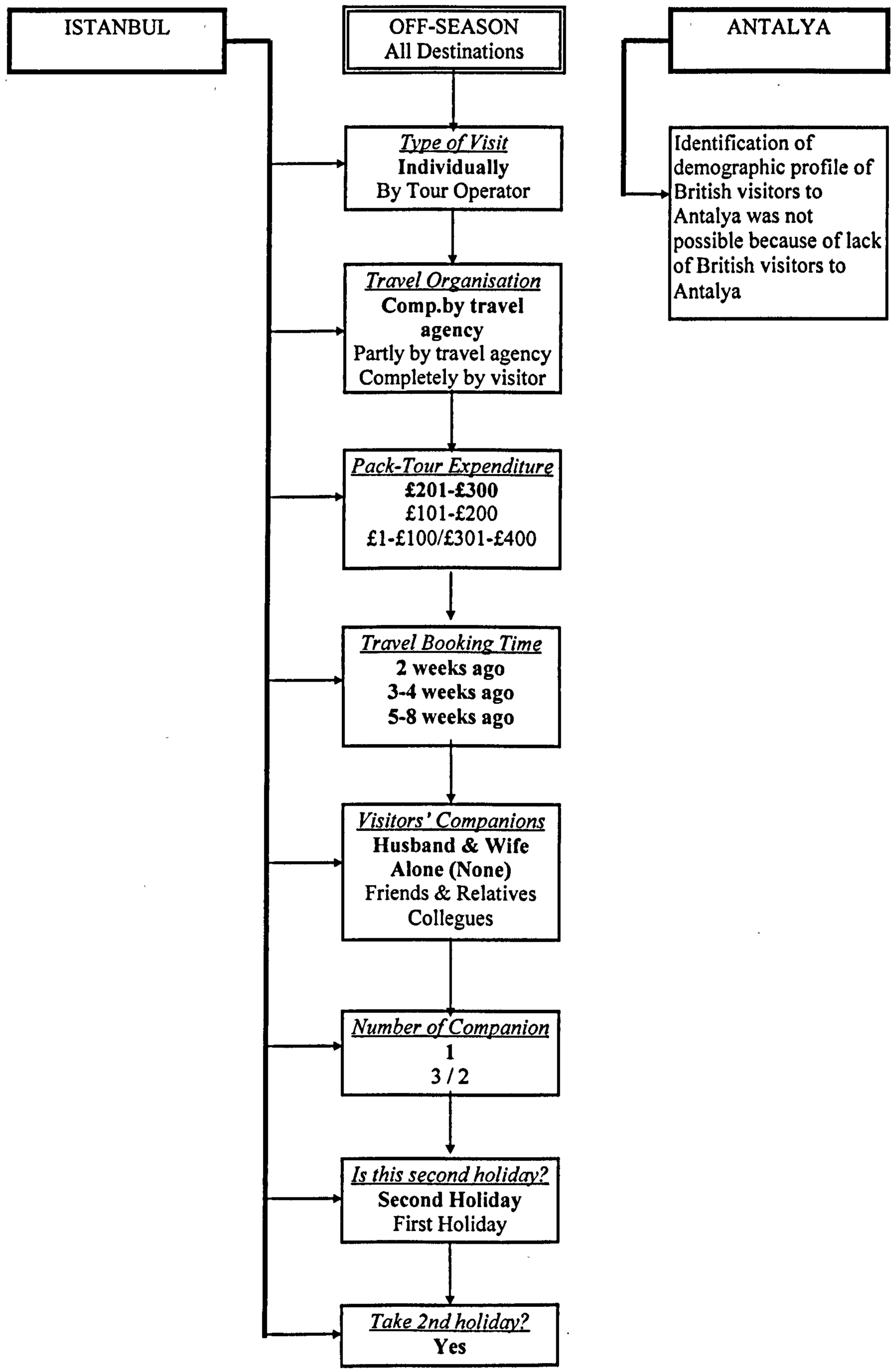
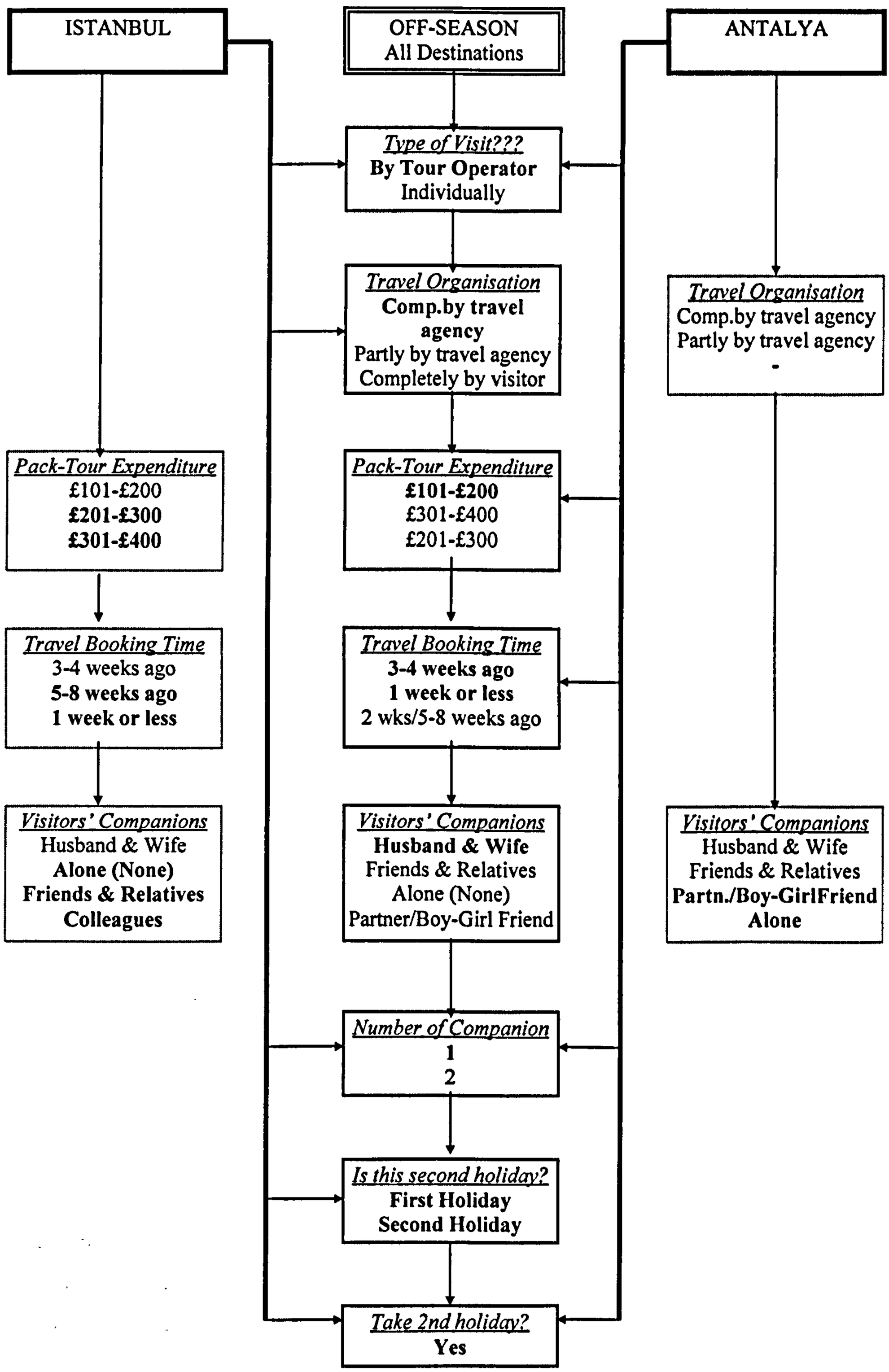


Figure 4.28 Travel organisation characteristics of German visitors by destination

(*See also Appendix 109, 110, 111*)



4.5. Preferences of visitors while in Turkey

Length of Stay

It was observed that majority of visitors (71%) stayed in Turkey one week or less. While overall visitors who spent 6-7 nights in Turkey were on the first rank with 39%, it was followed by 3-5 nights (27%) and 11-14 nights (19%). However, the length of stay in Turkey indicated large differences between British and German visitors (p=0.00000< 0.05). As seen on Table 4.133, the length of stay was longer for German visitors. Compared to as high as 81% of British visitors, it was lower for German visitors (68%) and in contrast, the number of German visitors who spent more than one week was 14% higher than British visitors. The popular length of stay was 3-5 nights which is called as short-breaks, and 6-7 nights respectively. On the other hand, German visitors' preference was in favour of one-week and two-week holidays and short breaks.

Table 4.133 Length of stay in Turkey by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
1-2 nights	20	8.7	26	3.2	46	4.4
3-5 nights	136	59.4	151	18.4	287	27.3
6-7 nights	30	13.1	379	46.2	409	39.0
8-10 nights	10	4.4	40	4.9	50	4.8
11-14 nights	20	8.7	181	22.0	201	19.1
15-21 nights	4	1.7	30	3.7	34	3.2
22 or more	9	3.9	12	1.5	21	2.0
None	-	-	2	0.2	2	0.2
Total	229	100	821	100	1050	100
	N 1050 p= 0.00000< 0.05					

Although popular length of stays ranking was similar between first and second shoulder which were 6-7, 3-5 and 11-14 nights respectively, around 14% decrease was recorded in the number of overall visitors who spent more than one week in Turkey in the second shoulder. In contrast to significant increase in 6-7 night stays, noteworthy decrease was seen in the number of 11-14 night stays in the second shoulder. That indicates that more visitors preferred first shoulder for longer holidays, while second shoulder was chosen for shorter stays.

Significant differences were observed in German visitors' length of stay between shoulders (p=0.00000< 0.05). The number of German visitors who spent more than one week significantly decreased in the second shoulder from 41% to 22%. Visitors who spent less than one week increased in the second shoulder. In other words, German visitors preferred spending longer time in Turkey in the first shoulder and less time in the second shoulder. In contrast, British visitors did not show important changes in their length of stay between shoulders (p= 0.06385 >0.05) (Table 4.134). As a largest group, around 59% of British visitors spent 3-5 nights in Turkey in both

shoulders. While short stays decreased, medium and longer stays in general indicated increase in the second shoulder. It was worth noting that while British visitors spending lesser time in the first shoulder, longer time in the second shoulder, in contrast, German visitors spent significantly more time in the first shoulder compared to second shoulder.

Table 4.134 Length of stay in Turkey and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
1-2 nights	11	10.4	9	7.3	17	3.9	9	2.4	28	5.1	18	3.6
3-5 nights	63	59.4	73	59.3	79	17.9	72	18.9	142	26.0	145	28.8
6-7 nights	18	17.0	12	9.8	163	37.0	216	56.8	181	33.1	228	45.3
8-10 nights	1	0.9	9	7.3	26	5.9	14	3.7	27	4.9	23	4.6
11-14 nights	8	7.5	12	9.8	125	28.3	56	14.7	133	24.3	68	13.5
15-21 nights	3	2.8	1	0.8	24	5.4	6	1.6	27	4.9	7	1.4
22 or more	2	1.9	7	5.7	5	1.1	7	1.8	7	1.3	14	2.8
None	-	-	-	-	2	0.5	-	-	2	0.4	-	-
Total	106	100	123	100	441	100	380	100	547	100	503	100
	N 229 p=0.06385 >0.05				N 821 p=0.00000< 0.05				N 1050 p=0.00000< 0.05			

Table 4.135 Length of stay in Turkey and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
1-2 nights	20	8.9	-	-	24	10.2	2	0.3	44	9.5	2	0.3
3-5 nights	136	60.4	-	-	140	59.3	11	1.9	276	59.9	11	1.9
6-7 nights	29	12.9	1	25.0	30	12.7	349	59.7	59	12.8	350	59.4
8-10 nights	9	4.0	1	25.0	11	4.7	29	5.0	20	4.3	30	5.1
11-14 nights	19	8.4	1	25.0	13	5.5	168	28.7	32	6.9	169	28.7
15-21 nights	3	1.3	1	25.0	9	3.8	21	3.6	12	2.6	22	3.7
22 or more	9	4.0	-	-	7	3.0	5	0.9	16	3.5	5	0.8
None	-	-	-	-	2	0.8	-	-	2	0.4	-	-
Total	225	100	4	100	236	100	585	100	461	100	589	100
	N 229 p=0.00170< 0.05				N 821 p=0.00000< 0.05				N 1050 p=0.00000< 0.05			

Significant differences were observed in the visitors' length of stay in Istanbul and Antalya (Table 4.135). Shorter stays in Istanbul and longer stays in Antalya were recorded. 82% of all British, German and overall visitors spent one week or less in Istanbul. The share of visitors who spent more than one week was higher in Antalya compared to Istanbul. While 60% of visitors spent 3-5 nights in Istanbul, 59% of visitors 6-7 nights and 29% stayed 11-14 nights in Antalya. The popular holiday periods for all British and German visitors in Istanbul were 3-5, 6-7, 1-2 and 11-14 nights respectively. On the other hand, they were realised as 6-7, 11-14, 8-10 and 15-21 nights in Antalya where 99% of all visitors were German. In summary, without regarding the nationality of visitors, Istanbul was preferred for mainly for shorter holidays, longer time was spent in Antalya.

Number of provinces visited

Majority of visitors (82%) stated that they had visited only one province. In other words they spent all time at their actual destination and did not travel around except for few excursions and sightseeing trips in their destination provinces. As Table 4.136 indicates visits to outside destination province more common among German visitors than British visitors. While 15% of British visitors visited at least one or more provinces, that rate was recorded for German visitors as 19%. British visits to outside destination province realised for generally business purposes, German visitors visit were generally in the form of excursion.

Table 4.136 Number of provinces visited by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Destination Provin.	191	85.3	668	80.8	859	81.7
One	23	10.3	102	12.3	125	11.9
Two	5	2.2	12	1.5	17	1.6
Three or more	5	2.2	45	5.4	50	4.8
Total	224	100	827	100	1051	100
	N 1051 p= 0.13576 >0.05					

The number of provinces visited indicated significant differences between shoulders. Around 80% of overall visitors did not visit any other province than the destination province. However, the number of visits to outside destination province was different between shoulders. While more visitors preferred visiting one other province in the second shoulder, two or more province visits were significantly higher in the first shoulder. On the nationality base, in contrast to the increase in British visitors travelling to other provinces in second shoulder, less German visitors preferred visiting other provinces in the second shoulder compared to first shoulder. In other words, while German visitors were more mobile in the first shoulder, British visitors were more mobile in the second shoulder (Table 4.137).

Table 4.137 Number of provinces visited and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Destination Provin.	90	88.2	101	82.8	348	78.7	320	83.1	438	80.5	421	83.0
One	7	6.9	16	13.1	47	10.6	55	14.3	54	9.9	71	14.0
Two	2	2.0	3	2.5	11	2.5	1	0.3	13	2.4	4	0.8
Three or more	3	2.9	2	1.6	36	8.1	9	2.3	39	7.2	11	2.2
Total	102	100	122	100	442	100	385	100	544	100	507	100
	N 224 p=0.42485 >0.05				N 827 p=0.00005< 0.05				N 1051 p=0.00007< 0.05			

While British visitors did not show important differences, German visitors' preference on the number of province visited was different in first and second shoulders. It was obvious that German

visitors liked being more mobile in the first shoulder. While 21% of German visitors visited one or more other provinces in the first shoulder, it decreased to 17% in the second shoulder. Considerable increases were seen in the German visitors who spent all time at the actual destination province and who visited only one province. In contrast to German visitors, British visitors visited more provinces in the second shoulder compared to the first shoulder. In this respect, preference of German and British visitors in visiting other provinces indicated differences by shoulder.

Table 4.138 Number of provinces visited and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Destination Provin.	188	85.5	3	75.0	188	81.4	480	80.5	376	83.4	483	80.5
One	23	10.5	-	-	23	10.0	79	13.3	46	10.2	79	13.2
Two	5	2.3	-	-	4	1.7	8	1.3	9	2.0	8	1.3
Three or more	4	1.8	1	25.0	16	6.9	29	4.9	20	4.4	30	5.0
Total	220	100	4	100	231	100	596	100	451	100	600	100
	N 224 p=0.01842< 0.05				N 827 p=0.39842 >0.05				N 1051 p=0.38604 >0.05			

The number of visited provinces by actual destination did not indicate worth noting differences. The Table 4.138 shows that 17% of visitors to Istanbul and 20% of visitors to Antalya visited at least one other province. British and German visitors visits to other provinces from Istanbul were mainly business related and to industrial provinces such as Bursa, Izmir and Ankara. On the other hand, a large proportion of German visits was paid to neighbouring provinces and particularly to Pamukkale where located in neighbouring province of Antalya and famous for its thermal springs and cotton white cascade of petrified basins created by spring waters running off the edge of plateau. The provinces and regions which were frequently visited by visitors identified in order as follows:

British visitors		German visitors	
Region	Province	Region	Province
Marmara	Istanbul	Mediterranean	Antalya
Central Anatolia	Ankara	Marmara	Istanbul
Mediterranean	Antalya	Aegean	Denizli(Pamukkale)
Aegean	Izmir	Marmara	Bursa
Marmara	Bursa	Aegean	Izmir
Central Anatolia	Nevsehir	Central Anatolia	Ankara
Mediterranean	Adana	Aegean	Mugla
Aegean	Denizli	Marmara	Canakkale
Aegean	Afyon	Aegean	Aydin

Mainly large industrial provinces visited by British visitors. However, provinces visited by German visitors were coastal provinces and other tourism centres as well as industrial provinces. As Table 4.139 indicates, German visitors also visited more and diverse provinces than British visitors. That shows that German visitors may help improving regional imbalance in the distribution of tourism activities and foreign visitors whatever their purpose is. On the other hand, it tells that promotion

activities in the British tourist market should concentrate in attracting British visitors to other provinces than Istanbul and other few provinces, and encouraging them to visit multiple destinations while in Turkey.

Table 4.139 Provinces visited by nationality

	British		German		Total	
	n	%	*n*	%	*n*	%
Antalya	8	2.96	596	51.83	604	42.5
Istanbul	195	72.22	226	19.65	421	29.65
Denizli	3	1.11	96	8.35	99	6.97
Bursa	4	1.48	38	3.30	42	2.96
Izmir	7	2.59	34	2.96	41	2.89
Ankara	19	7.04	20	1.74	39	2.75
Mugla	2	0.74	18	1.57	20	1.41
Canakkale	-	-	16	1.39	16	1.13
Aydin	1	0.37	12	1.04	13	0.92
Balikesir	1	0.37	12	1.04	13	0.92
Icel	2	0.74	11	0.96	13	0.92
Konya	2	0.74	9	0.78	11	0.77
Nevsehir	4	1.48	7	0.61	11	0.77
Afyon	2	0.74	7	0.61	9	0.63
Adana	3	1.11	5	0.43	8	0.56
Manisa	1	0.37	6	0.52	7	0.49
Edirne	2	0.74	2	0.17	4	0.28
Hatay	-	-	4	0.35	4	0.28
Other Provinces	14	5.2-	31	2.7	45	3.2
Total	n 270	100	n 1150	100	n 1420	100
	N 225		N 826		N 1051	
	(Case N) N 1051 (Responses N) n 1420 p= NA					

Region of visit

As expected, depending on the favourite destination of visitors, Marmara region where Istanbul is located in for British visitors, and Mediterranean region where Antalya is located in were identified as most favourite regions visited. Apart from these regions, Aegean and Central Anatolian regions were other important regions visited by overall visitors. Visitation to other regions was very low (Table 4.140). British and German visitors' regional preferences were different. While Marmara, Central Anatolia, Aegean and Mediterranean regions were popular among British visitors, German visitors' favourite regions were Mediterranean, Marmara, Aegean and Central Anatolian regions respectively. Unlike British visitors who concentrated mostly in Marmara region (76%), German visitors scattered around Western regions of Turkey which are Mediterranean, Marmara and Aegean regions.

Overall visitors' regional preference did not indicate significant differences between shoulders. Proportion of visitors visiting various regions were more or less same in the first and second shoulders indicating that these regions attracts similar proportion of visitors in both shoulders. Although the ranking of regions visited by German visitors and the proportion of these regions did

not indicate important changes, British visitors indicated differences between shoulders. In contrast to decrease in the proportion of visitors to Marmara and Aegean regions, Mediterranean and Central Anatolia's share in total increased. Table 4.141 shows that while the share of both British and German visitors in Marmara and Mediterranean regions decreased, they indicated an increase in Mediterranean region in the second shoulder compared to first shoulder.

Table 4.140 Region of visit by nationality

	British		German		Total	
	n	%	*n*	%	*N*	%
Marmara	206	76.0	296	25.8	502	35.4
Aegean	16	5.9	174	15.2	190	13.4
Mediterranean	14	5.2	620	54.0	634	44.7
Central Anatolia	27	10.0	44	3.8	71	5.0
Black Sea	2	0.7	2	0.2	4	0.3
East Anatolia	-	-	3	0.3	3	0.2
S.East Anatolia	2	0.7	5	0.4	7	0.5
Turkish Cyprus	3	1.1	3	0.3	6	0.4
Unknown region	1	0.4	1	0.1	2	0.1
Total	n 271	100	n 1148		n 1419	100
	N 225		N 826		N 1051	
	(Case N) N 1051 (Responses N) n 1419 p= 0.000					

Table 4.141 Region of visit and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	n	%	n	%	n	%	n	%	n	%	n	%
Marmara	98	81.7	108	71.5	176	26.5	120	24.8	274	34.9	228	35.9
Aegean	8	6.7	8	5.3	106	16.0	68	14.0	114	14.5	76	12.0
Mediterranean	3	2.5	11	7.3	333	50.2	287	59.3	336	42.9	298	46.9
Centr.Anatolia	8	6.7	19	12.6	36	5.4	8	1.7	44	5.6	27	4.3
Black Sea	2	1.7	-	-	2	0.3	-	-	4	0.5	-	-
East Anatolia	-	-	-	-	3	0.5	-	-	3	0.4	-	-
S. East Anatolia	1	0.8	1	0.7	4	0.6	1	0.2	5	0.6	2	0.3
Turkish Cyprus	-	-	3	2.0	3	0.5	-	-	3	0.4	3	0.5
Unknown Region	-	-	1	0.7	1	0.2	-	-	1	0.1	1	0.2
Total	120	100	151	100	664	100	484	100	784	100	635	100
	N 102		N 123		N 442		N 384		N 544		N 507	
	N 225 p=0.133 n 271				N 826 p=0.027 n 1148				N 1051 p=0.587 n 1419			
	Numbers (rN) based on responses N No of cases (visitors) n No of responses											

British visitors to Istanbul mainly visited provinces in Marmara, Central Anatolia, Aegean and Mediterranean regions respectively. On the other hand, German visitors concentrated in three regions in particular which were Marmara, Aegean, Central Anatolia and Mediterranean regions. In Antalya, German visitors' regional preference realised as Mediterranean, Aegean, Marmara and Central Anatolia. In summary, visitors primarily stayed in the actual destination region or visited provinces within the destination region, and they visited other regions if necessary depending on their purpose of visit. For instance, a British business visitor may visit Bursa, Ankara and Izmir as well as their actual destination Istanbul, or a holidaying German visitor may spend all time in Antalya or he/she may visit other tourist destinations in neighbouring provinces or regions such as

Pamukkale in Aegean region. It is worth noting that, visitors concentrated in a few regions and very small proportion and number of overall visitors visited Eastern, South-Eastern Anatolian and Black Sea regions (Table 4.142).

Table 4.142 Region of visit and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	n	%	n	%	N	%	N	%	N	%	N	%
Marmara	206	78.0	-	-	n	%	n	%	n	%	n	%
Aegean	14	5.3	2	28.6	234	70.9	62	7.6	440	74.1	62	7.5
Mediterranean	10	3.8	4	57.1	45	13.6	129	15.8	59	9.9	131	15.9
Central Anatolia	26	9.8	1	14.3	17	5.2	603	73.7	27	4.5	607	73.6
Black Sea	2	0.8	-	-	24	7.3	20	2.4	50	8.4	21	2.5
East Anatolia	-	-	-	-	2	0.6	-	-	4	0.7	-	-
S. EastAnatolia	2	0.8	-	-	3	0.9	-	-	3	0.5	-	-
Turkish Cyprus	3	1.1	-	-	4	1.2	1	0.1	6	1.0	1	0.1
Unknown region	1	0.4	-	-	1	0.3	2	0.2	4	0.7	2	0.2
Total	264	100	7	100	-	-	1	0.1	1	0.2	1	0.1
	N 221		N 4		N 230		N 596		N 451		N 600	
	N 225 p=0.000 n 271				N 826 p=0.000 n 1148				N 1051 p=0.000 n 1419			
	Numbers (rN) based on responses N No of cases (visitors) n No of responses											

Number of nights spent in provinces

Tables 191, 192 and 193 show the number of nights spent in the other provinces outside actual destinations which were Istanbul and Antalya. While 53 British visitors paying 72 visits to other provinces which indicate 1.4 visits per visitor, 183 German visitors visited 321 other provinces, 1.7 visits per visitors. In other words, German visitors visited more province than British visitors. Since most visitors visited more than one province and the length of stay in those provinces indicated difference, the analysis based on the responses rather than cases. Therefore, it was not possible to compute p values (Chi Square) for multiple responses.

Table 4.143 No of nights spent in provinces visited by nationality
(Excluding actual destinations, Istanbul and Antalya)

	British		German		Total	
	n	%	*n*	%	*n*	%
1-2 nights	20	27.8	181	56.4	201	51.1
3-5 nights	23	31.9	13	4.0	36	9.2
6-7 nights	6	8.3	7	2.2	13	3.3
8-10 nights	2	2.8	6	1.9	8	2.0
11-14 nights	6	8.3	10	3.1	16	4.1
15-21 nights	1	1.4	6	1.9	7	1.8
22-60 nights	3	4.2	2	0.6	5	1.3
Not known	11	15.3	96	29.9	107	27.2
Total	n 72	100	n 321	100	n 393	100
	N 53		N 184		N 237	
	(Case N) N 237 (Responses N) n 393 p= NA					

Around 60% of overall, British and German visitors spent between one and five nights in provinces outside actual provinces. However, distribution of this 60% between visitors who spent 1-2 nights and who spent 3-5 nights in other provinces indicated differences by nationality. The proportion of British visitors who spent 1-2 nights and 3-5 nights were very close to each other. On the other hand, German visitors who spent 1-2 nights were in supreme majority. In this respect, British visitors were identified as visitors who spent longer time outside actual destinations.

Overall visitors indicated significant differences between shoulders in terms of the time they spent in the provinces they visited. While the proportion of visitors who spent 1-2 nights and 15-21 nights decreased significantly from 58% to 40% in the second shoulder, the share of visitors in total who spent 3-14 nights increased from 14% in the first shoulder to 27% in the second shoulder. That means visitors in the second shoulder stay longer compared to visitors in the first shoulder. In parallel to the overall visitors, British and German visitors spent longer time in the second shoulder (Table 4.144).

(Table 4.145) also showed important differences in the number of nights spent outside actual destination. It was clear that visitors departing from Antalya preferred staying shorter where they visited while other visitors whose departure point was Istanbul spent longer time in other provinces. British visitors visiting Istanbul spent longer time in other visited provinces compared to German visitors who preferred spending mostly 1-2 nights outside Istanbul. Proportion of German visitors who spent lesser time, 1-2 nights, outside actual destination was even higher in Antalya, 61%. British visitors tended to stay longer outside Istanbul. Meanwhile German visitors preferred shorter stays outside Istanbul and in particular Antalya.

Table 4.144 No of nights spent in provinces visited and shoulder season by nationality (Excluding actual destinations, Istanbul and Antalya)

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	n	%	n	%
1-2 nights	n	%	n	%	n	%	n	%	144	57.6	57	39.9
3-5 nights	11	33.3	9	23.1	133	61.3	48	46.2	20	8.0	16	11.2
6-7 nights	10	30.3	13	33.3	10	4.6	3	2.9	4	1.6	9	6.3
8-10 nights	2	6.1	4	10.3	2	0.9	5	4.8	3	1.2	5	3.5
11-14 nights	-	-	2	5.1	3	1.4	3	2.9	8	3.2	8	5.6
15-21 nights	1	3.0	5	12.8	7	3.2	3	2.9	5	2.0	2	1.4
22-60 nights	1	3.0	-	-	4	1.8	2	1.9	-	-	5	3.5
Not known	-	-	3	7.7	-	-	2	1.9	66	26.4	41	28.7
Total	8	24.2	3	7.7	58	26.7	38	36.5	250	100	143	100
	N 22		N 31		N 109		N 75		N 131		N 106	
	N 53 p=NA n 72				N 184 p=NA n 321				N 237 p=NA n 393			
	N No of cases (visitors) n No of responses											

Table 4.145 No of nights spent in provinces visited and survey place by nationality (Excluding actual destinations, Istanbul and Antalya)

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
1-2 nights	19	27.5	1	33.3	57	48.7	124	60.8	76	40.9	125	60.4
3-5 nights	22	31.9	1	33.3	11	9.4	2	1.0	33	17.7	3	1.4
6-7 nights	5	7.2	1	33.3	3	2.6	4	2.0	8	4.3	5	2.4
8-10 nights	2	2.9	-	-	5	4.3	1	0.5	7	3.8	1	0.5
11-14 nights	6	8.7	-	-	4	3.4	6	2.9	10	5.4	6	2.9
15-21 nights	1	1.4	-	-	5	4.3	1	0.5	6	3.2	1	0.5
22-60 nights	3	4.3	-	-	1	0.9	1	0.5	4	2.2	1	0.5
Not known	11	15.9	-	-	31	26.5	65	31.9	42	22.6	65	31.4
Total	69	100	3	100	117	100	204	100	186	100	207	100
	N 52		N 1		N 57		N 127		N 109		N 128	
	N 53 p=NA n 72				N 184 p=NA n 321				N 237 p=NA n 393			
	N No of cases (visitors) n No of responses											

The Table 4.146 and following tables give a clear idea about the visitors' length of stay in different regions. The figures in these tables include the nights spent in Istanbul and Antalya as well. As mentioned above majority of visitors concentrated in Marmara, Aegean, Mediterranean and Central Anatolian regions and few visitors stayed in other regions. 37.9% of 1-2 night stays and 70% of 3-5 night stays recorded in Marmara. 32.5% of 1-2 night stays were realised in Aegean region, mainly in Pamukkale located in Denizli province. Approximately 75% of 6-7 and 11-14 night and 40.5% of 8-10 night stays were recorded in Mediterranean region. While shorter stays were observed in Marmara and Aegean regions, visitors spent longer time in Mediterranean region.

Table 4.146 Total no of nights spent by regions visited

	Total visitor nights in visited provinces									
	Marmar	Aegean	Mediter.	C.Anato.	B.Sea	E.Anato.	SE.Anat.	Cyprus	unknown	Total
1-2 nights	349	300	174	89	5	1	4	0	0	922
(%)	*35.0*	*45.7*	*18.5*	*35.3*	*29.4*	*10.0*	*22.2*	*.0*	*.0*	*31.7*
3-5 nights	305	48	34	39	2	2	4	2	0	436
(%)	*30.6*	*7.3*	*3.6*	*15.5*	*11.8*	*20.0*	*22.2*	*18.2*	*.0*	*15.0*
6-7 nights	56	44	332	5	1	0	0	2	0	440
(%)	*5.6*	*6.7*	*35.3*	*2.0*	*5.9*	*.0*	*.0*	*18.2*	*.0*	*15.2*
8-10 nights	23	17	30	3	0	0	1	0	0	74
(%)	*2.3*	*2.6*	*3.2*	*1.2*	*.0*	*.0*	*5.6*	*.0*	*.0*	*2.5*
11-14 nights	17	28	153	7	2	0	0	3	0	210
(%)	*1.7*	*4.3*	*16.3*	*2.8*	*11.8*	*.0*	*.0*	*27.3*	*.0*	*7.2*
15-21 nights	7	4	15	4	0	0	0	0	1	31
(%)	*.7*	*.6*	*1.6*	*1.6*	*.0*	*.0*	*.0*	*.0*	*50.0*	*1.1*
22-60 nights	5	3	7	3	0	0	1	0	1	20
(%)	*.5*	*.5*	*.7*	*1.2*	*.0*	*.0*	*5.6*	*.0*	*50.0*	*.7*
Unknown	236	212	195	102	7	7	8	4	0	771
(%)	*23.6*	*32.3*	*20.7*	*40.5*	*41.2*	*70.0*	*44.4*	*36.4*	*.0*	*26.5*
Total	998	656	940	252	17	10	18	11	2	2904
(%)	*34.4*	*22.6*	*32.4*	*8.7*	*.6*	*.3*	*.6*	*.4*	*.1*	*100*
N	501	189	633	71	4	2	7	6	2	1049
(%)	*47.8*	*18.0*	*60.3*	*6.8*	*0.4*	*0.2*	*0.7*	*0.6*	*0.2*	*100*

Table 4.147 Number of British nights spent by regions visited

	British visitor nights in visited provinces									
	Marmar	Aegean	Mediter.	C.Anato.	B.Sea	E.Anato.	SE.Anat.	Cyprus	unknown	Total
1-2 nights	34	10	11	10	2	-	1	-	-	68
(%)	*13.5*	*23.3*	*33.3*	*15.6*	*50.0*	-	*33.3*	-	-	*16.8*
3-5 nights	145	14	2	29	-	-	-	2	-	192
(%)	*57.8*	*32.6*	*6.1*	*45.3*	-	-	-	*33.3*	-	*47.4*
6-7 nights	32	4	4	2	-	-	-	2	-	44
(%)	*12.7*	*9.3*	*12.1*	*3.1*	-	-	-	*33.3*	-	*10.9*
8-10 nights	4	2	2	1	-	-	-	-	-	9
(%)	*1.6*	*4.7*	*6.1*	*1.6*	-	-	-	-	-	*2.2*
11-14 nights	10	1	2	4	2	-	-	2	-	21
(%)	*4.0*	*2.3*	*6.1*	*6.3*	*50.0*	-	-	*33.3*	-	*5.2*
15-21 nights	2	-	1	-	-	-	-	-	-	3
(%)	*.8*	-	*3.0*	-	-	-	-	-	-	*.7*
22-60 nights	4	2	3	3	-	-	-	-	1	13
(%)	*1.6*	*4.7*	*9.1*	*4.7*	-	-	-	-	*100.0*	*3.2*
Unknown	20	10	8	15	-	-	2	-	-	55
(%)	*8.0*	*23.3*	*24.2*	*23.4*	-	-	*66.7*	-	-	*13.6*
Total	251	43	33	64	4	-	3	6	1	405
(%)	*62.0*	*10.6*	*8.1*	*15.8*	*1.0*	-	*.7*	*1.5*	*.2*	*100.0*
N	206	16	14	27	2	-	2	3	1	225
(%)	*91.6*	*7.1*	*6.2*	*12.0*	*0.9*	-	*0.9*	*1.3*	*0.4*	*100*

Table 4.148 Number of German nights spent by regions visited

	German visitor nights in visited provinces									
	Marmar	Aegean	Mediter.	C.Anato.	B.Sea	E.Anato.	SE.Anat.	Cyprus	unknown	Total
1-2 nights	315	290	163	79	3	1	3	-	-	854
(%)	*42.2*	*47.3*	*18.0*	*42.0*	*23.1*	*10.0*	*20.0*	-	-	*34.2*
3-5 nights	160	34	32	10	2	2	4	-	-	244
(%)	*21.4*	*5.5*	*3.5*	*5.3*	*15.4*	*20.0*	*26.7*	-	-	*9.8*
6-7 nights	24	40	328	3	1	-	-	-	-	396
(%)	*3.2*	*6.5*	*36.2*	*1.6*	*7.7*	-	-	-	-	*15.8*
8-10 nights	19	15	28	2	-	-	1	-	-	65
(%)	*2.5*	*2.4*	*3.1*	*1.1*	-	-	*6.7*	-	-	*2.6*
11-14 nights	7	27	151	3	-	-	-	1	-	189
(%)	*.9*	*4.4*	*16.6*	*1.6*	-	-	-	*20.0*	-	*7.6*
15-21 nights	5	4	14	4	-	-	-	0	1	28
(%)	*.7*	*.7*	*1.5*	*2.1*	-	-	-	*.0*	*100.0*	*1.1*
22-60 nights	1	1	4	-	-	-	1	0	-	7
(%)	*.1*	*.2*	*.4*	-	-	-	*6.7*	*.0*	-	*.3*
Unknown	216	202	187	87	7	7	6	4	-	716
(%)	*28.9*	*33.0*	*20.6*	*46.3*	*53.8*	*70.0*	*40.0*	*80.0*	-	*28.7*
Total	747	613	907	188	13	10	15	5	1	2499
(%)	*29.9*	*24.5*	*36.3*	*7.5*	*.5*	*.4*	*.6*	*.2*	*.0*	*100.0*
N	295	173	619	44	2	2	5	3	1	824
(%)	*35.8*	*21.0*	*75.1*	*5.3*	*0.2*	*0.2*	*0.6*	*0.4*	*0.1*	*100*

While most British visitors spent 3-5 nights particularly in Marmara and Central Anatolia (47%), proportion of British visitors who spent longer than one week was rather low, 22%. Number of visitors who visited Black Sea, Eastern and South Eastern Anatolia and proportion of nights they spent in total were very small (Table 4.147). On the other hand, in contrast to British visitors, most German visitors spent 1-2 nights particularly in Aegean and Marmara regions. While 44% of German visitors spent less than one week in Turkey, the proportion of German visitors who spent

longer than one week was 28% which was higher compared to British visitors. The majority of German visitors spent 1-2 nights in Marmara, Aegean and Central Anatolia regions and they spent 6-7 and 11-14 nights in Mediterranean region (Table 4.148). That indicates that most German visitors were sojourn visitors in Mediterranean region while most British holiday and business visitors were short-breakers in Marmara and Central Anatolian and partly in Aegean regions.

As Table 4.149 indicates, 1-5 night short stays in the first shoulder were realised in Marmara, Aegean and Central Anatolian regions. 71% of stays in Marmara and around 60% of stays in Aegean and Central Anatolian regions were between 1 and 5 nights in the first shoulder. The length of stay in Mediterranean region in the first shoulder was significantly high compared to other regions. 51% of stays in Mediterranean region in the first shoulder were more than one week.

Table 4.150 indicates general increase in longer stays in the second shoulder. As in the first shoulder, visitors preferred spending shorter time in Marmara, Aegean and Central Anatolian regions and longer time in Mediterranean region. While 65% of stays were more than one week in Mediterranean region, it was realised as between only 11% and 21% for other regions. The difference between Mediterranean region and the others were quite significant. As a result, the length of stay was higher in Mediterranean region and lower in other regions. However, the length of stay had the tendency towards longer stays in the second shoulder compared to first shoulder.

Table 4.149 Number of nights spent in 1st shoulder by regions visited

	1st Shoulder visitor nights in visited provinces									
	Marmar	Aegean	Mediter.	C.Anato.	B.Sea	E.Anato.	SE.Anat.	Cyprus	unknown	Total
1-2 nights	294	231	118	82	5	1	3	-	-	734
(%)	*46.9*	*53.7*	*22.3*	*49.7*	*29.4*	*10.0*	*21.4*	-	-	*40.8*
3-5 nights	148	28	19	15	2	2	4	-	-	218
(%)	*23.6*	*6.5*	*3.6*	*9.1*	*11.8*	*20.0*	*28.6*	-	-	*12.1*
6-7 nights	34	13	132	3	1	-	-	-	-	183
(%)	*5.4*	*3.0*	*25.0*	*1.8*	*5.9*	-	-	-	-	*10.2*
8-10 nights	14	10	19	2	-	-	1	-	-	46
(%)	*2.2*	*2.3*	*3.6*	*1.2*	-	-	*7.1*	-	-	*2.6*
11-14 nights	7	23	105	3	2	-	-	1	-	141
(%)	*1.1*	*5.3*	*19.8*	*1.8*	*11.8*	-	-	*20.0*	-	*7.8*
15-21 nights	2	3	12	4	-	-	-	-	1	22
(%)	*.3*	*.7*	*2.3*	*2.4*	-	-	-	-	*100.0*	*1.2*
22-60 nights	1	-	2	-	-	-	-	-	-	3
(%)	*.2*	-	*.4*	-	-	-	-	-	-	*.2*
Unknown	127	122	122	56	7	7	6	4	-	451
(%)	*20.3*	*28.4*	*23.1*	*33.9*	*41.2*	*70.0*	*42.9*	*80.0*	-	*25.1*
Total	627	430	529	165	17	10	14	5	1	1798
(%)	*34.9*	*23.9*	*29.4*	*9.2*	*.9*	*.6*	*.8*	*.3*	*.1*	*100.0*
N	273	113	335	44	4	2	5	3	1	542
(%)	*50.4*	*20.8*	*61.8*	*8.1*	*0.7*	*0.4*	*0.9*	*0.6*	*0.2*	*100*

The length of stay by region indicated significant differences in Istanbul and Antalya. While visitors to Istanbul mainly preferred spending 1-5 nights in Turkey, 62%, the proportion of visitors to Antalya who spent less than one week and who spent more than one week in Turkey were almost

equal, 36%. Visitors to Antalya spent more time in Turkey than visitors to Istanbul (Table 4.151-4.152).

Table 4.150 Number of nights spent in 2nd shoulder by regions

	2nd shoulder visitor nights in visited provinces									
	Marmar	Aegean	Mediter.	C.Anato.	B.Sea	E.Anato.	SE.Anat.	Cyprus	unknown	Total
1-2 nights	55	69	56	7	-	-	1	-	-	188
(%)	*14.8*	*30.5*	*13.6*	*8.0*	-	-	*25.0*	-	-	*17.0*
3-5 nights	157	20	15	24	-	-	-	2	-	218
(%)	*42.3*	*8.8*	*3.6*	*27.6*	-	-	-	*33.3*	-	*19.7*
6-7 nights	22	31	200	2	-	-	-	2	-	257
(%)	*5.9*	*13.7*	*48.7*	*2.3*	-	-	-	*33.3*	-	*23.2*
8-10 nights	9	7	11	1	-	-	-	-	-	28
(%)	*2.4*	*3.1*	*2.7*	*1.1*	-	-	-	-	-	*2.5*
11-14 nights	10	5	48	4	-	-	-	2	-	69
(%)	*2.7*	*2.2*	*11.7*	*4.6*	-	-	-	*33.3*	-	*6.2*
15-21 nights	5	1	3	-	-	-	-	-	-	9
(%)	*1.3*	*.4*	*.7*	-	-	-	-	-	-	*.8*
22-60 nights	4	3	5	3	-	-	1	-	1	17
(%)	*1.1*	*1.3*	*1.2*	*3.4*	-	-	*25.0*	-	*100.0*	*1.5*
Unknown	109	90	73	46	-	-	2	-	-	320
(%)	*29.4*	*39.8*	*17.8*	*52.9*	-	-	*50.0*	-	-	*28.9*
Total	371	226	411	87	-	-	4	6	1	1106
(%)	*33.5*	*20.4*	*37.2*	*7.9*	-	-	*.4*	*.5*	*.1*	*100.0*
N	228	76	298	27	-	-	2	3	1	507
(%)	*45.0*	*15.0*	*58.8*	*5.3*	-	-	*0.4*	*0.6*	*0.2*	*100*

Table 4.151 Number of nights spent in Istanbul by regions visited

	Istanbul visitor nights in visited provinces									
	Marmar	Aegean	Mediter.	C.Anato.	B.Sea	E.Anato.	SE.Anat.	Cyprus	unknown	Total
1-2 nights	206	101	13	25	5	1	3	0	-	354
(%)	*30.7*	*47.0*	*15.3*	*16.2*	*29.4*	*10.0*	*20.0*	*.0*	-	*30.1*
3-5 nights	299	26	5	38	2	2	3	2	-	377
(%)	*44.6*	*12.1*	*5.9*	*24.7*	*11.8*	*20.0*	*20.0*	*28.6*	-	*32.1*
6-7 nights	52	5	4	4	1	-	-	2	-	68
(%)	*7.7*	*2.3*	*4.7*	*2.6*	*5.9*	-	-	*28.6*	-	*5.8*
8-10 nights	9	7	4	3	-	-	-	0	-	23
(%)	*1.3*	*3.3*	*4.7*	*1.9*	-	-	-	*.0*	-	*2.0*
11-14 nights	16	4	4	7	2	-	-	3	-	36
(%)	*2.4*	*1.9*	*4.7*	*4.5*	*11.8*	-	-	*42.9*	-	*3.1*
15-21 nights	7	2	-	4	-	-	-	-	-	13
(%)	*1.0*	*.9*	-	*2.6*	-	-	-	-	-	*1.1*
22-60 nights	5	2	3	3	-	-	1	-	1	15
(%)	*.7*	*.9*	*3.5*	*1.9*	-	-	*6.7*	-	*100.0*	*1.3*
Unknown	77	68	52	70	7	7	8	-	-	289
(%)	*11.5*	*31.6*	*61.2*	*45.5*	*41.2*	*70.0*	*53.3*	-	-	*24.6*
Total	671	215	85	154	17	10	15	7	1	1175
(%)	*57.1*	*18.3*	*7.2*	*13.1*	*1.4*	*.9*	*1.3*	*.6*	*.1*	*100.0*
N	439	58	26	50	4	2	6	4	1	449
(%)	*97.8*	*12.9*	*5.8*	*11.1*	*0.9*	*0.4*	*1.3*	*0.9*	*0.2*	*100*

The majority of less than one-week stays was recorded in Marmara, Aegean and Central Anatolian regions among visitors to Istanbul as well as visitors to Antalya. However, longer stays were recorded in Mediterranean region among visitors to Antalya. Number of visitors, whose actual destination was Istanbul, who spent nights in Mediterranean region was rather low, although they

also spent longer nights in this region. In short, except for Mediterranean region where longer stays were recorded, all other regions were visited for less than one week.

Table 4.152 Number of nights spent in Antalya by regions visited

	Antalya visitor nights in visited provinces									
	Marmar	Aegean	Mediter.	C.Anato.	B.Sea	E.Anato.	SE.Anat.	Cyprus	unknown	Total
1-2 nights	143	199	161	64	-	-	1	-	-	568
(%)	*43.7*	*45.1*	*18.8*	*65.3*	-	-	*33.3*	-	-	*32.9*
3-5 nights	6	22	29	1	-	-	1	-	-	59
(%)	*1.8*	*5.0*	*3.4*	*1.0*	-	-	*33.3*	-	-	*3.4*
6-7 nights	4	39	328	1	-	-	-	-	-	372
(%)	*1.2*	*8.8*	*38.4*	*1.0*	-	-	-	-	-	*21.5*
8-10 nights	14	10	26	-	-	-	1	-	-	51
(%)	*4.3*	*2.3*	*3.0*	-	-	-	*33.3*	-	-	*2.9*
11-14 nights	1	24	149	-	-	-	-	-	-	174
(%)	*.3*	*5.4*	*17.4*	-	-	-	-	-	-	*10.1*
15-21 nights	-	2	15	-	-	-	-	-	1	18
(%)	-	*.5*	*1.8*	-	-	-	-	-	*100.0*	*1.0*
22-60 nights	-	1	4	-	-	-	-	-	-	5
(%)	-	*.2*	*.5*	-	-	-	-	-	-	*.3*
Unknown	159	144	143	32	-	-	-	4	-	482
(%)	*48.6*	*32.7*	*16.7*	*32.7*	-	-	-	*100.0*	-	*27.9*
Total	327	441	855	98	-	-	3	4	1	1729
(%)	*18.9*	*25.5*	*49.5*	*5.7*	-	-	*.2*	*.2*	*.1*	*100.0*
N	62	131	607	21	-	-	1	2	1	600
(%)	*10.3*	*21.8*	*101.2*	*3.5*	-	-	*0.2*	*0.3*	*0.2*	*100*

Accommodation choice

Very high percentage of overall visitors stayed in a hotel and very small proportion of visitors stayed in other forms of accommodation and at their friends', relatives' or family's home in Turkey (Table 4.153). Accommodation choice of British and German visitors indicated some differences although majority of them stayed in hotels. While 80% of British visitors stayed in hotels, 13% of them spent their holiday at their friends, relatives' or family's home in Turkey and only 3% of British visitors preferred boarding houses (pensions).

Table 4.153 Accommodation choice by nationality

	British		German		Total	
	n	%	*n*	%	*n*	%
Hotel	190	80.2	767	91.4	957	88.9
Holiday Village	-	-	18	2.1	18	1.7
Boarding House	8	3.4	13	1.5	21	2.0
Friends & Relatives	30	12.7	19	2.3	49	4.6
Other	9	3.8	22	2.6	31	2.9
Total	n 237	100	n 839	100	n 1076	100
	N 225		N 813		N 1038	
	(Case N) N 1038 (Responses N) n 1076 p= 0.000					

On other hand, as high as 91% of German visitors preferred hotels. The proportion of visitors who preferred staying in friends', relatives' or family's home and boarding house were very small.

Different from British visitors, 2% of German visitors stayed in holiday villages while in Turkey as most German visitors visited Antalya and there are number of holiday villages in that province. In short, while hotels were most favourable and supreme accommodation type for German visitors, hotels were less popular and friends', relatives' or family's homes for British visitors were secondary favourable accommodation type after hotels.

Table 4.154 Accommodation choice and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	n	%	n	%	n	%	n	%	n	%	n	%
Hotel	86	80.4	104	80.0	406	89.8	361	93.3	492	88.0	465	89.9
Holiday Village	-	-	-	-	11	2.4	7	1.8	11	2.0	7	1.4
Boarding House	4	3.7	4	3.1	8	1.8	5	1.3	12	2.1	9	1.7
Friends & Relatives	13	12.1	17	13.1	14	3.1	5	1.3	27	4.8	22	4.3
Other	4	3.7	5	3.8	13	2.9	9	2.3	17	3.0	14	2.7
Total	107	100	130	100	452	100	387	100	559	100	517	100
	N 103		N 122		N 440		N 373		N 543		N 495	
	N 225 p=0.921 n 237				N 813 p=0.068 n 839				N 1038 p=0.469 n 1076			
	N No of cases (visitors) n No of responses											

In spite of small changes, accommodation choice of overall visitors in the first and second shoulders were similar. 88-90% of visitors preferred hotels and around 5% stayed at friends', relatives' or family's home in Turkey. In parallel to overall visitors, British and German visitors also did not indicate significant increases or decreases in the share of chosen accommodation types. Very small changes were recorded in German visitors' accommodation preference between shoulders. While the proportion of German visitors who stayed in hotels increased by about 4% in the second shoulder, other accommodation types' share decreased (Table 4.154).

Table 4.155 Accommodation choice and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
Hotel	188	80.7	2	50.0	222	88.4	545	92.7	410	84.7	547	92.4
Holiday Village	-	-	-	-	3	1.2	15	2.6	3	0.6	15	2.5
Boarding House	7	3.0	1	25.0	4	1.6	9	1.5	11	2.3	10	1.7
Friend & Relatives	29	12.4	1	25.0	10	4.0	9	1.5	39	8.1	10	1.7
Other	9	3.9	-	-	12	4.8	10	1.7	21	4.3	10	1.7
Total	233	100	4	100	251	100	588	100	484	100	592	100
	N 221		N 4		N 235		N 578		N 456		N 582	
	N 225 p=0.011 n 237				N 813 p=0.837 n 839				N 1038 p=0.000 n 1076			
	N No of cases (visitors) n No of responses											

Differences existed between visitors to Istanbul and Antalya in terms of their choice of accommodation. While more visitors to Antalya preferred hotels and holiday villages compared to visitors in Istanbul, the share of visitors whose choice of accommodation were friends', relatives' or family's home, boarding house and other type of accommodation such as guest house of universities and flats belong to companies were higher compared to visitors in Antalya (Table

4.155). Hotels and holiday villages were popular in Antalya and different type of accommodation types such as friends', relatives' or family's homes and boarding houses as well as hotels were popular in Istanbul. Variety of accommodation type used in Antalya was wider compared to Antalya.

Participated activities while in Turkey

More than one third of overall visitors participated in excursions to places they were interested in. Sightseeing around the actual destinations, visiting other provinces especially neighbouring cities, shopping, business and various sports activities were other popular activities for the visitors. Short, medium or longer trips to places in and outside destination were most popular activities. In other words, visitors preferred taking the advantage of being in Turkey and visit and see as many places and attractions as possible while in Turkey. Very small proportion of overall visitors participated in special interest activities such as sailing and jeep safari.

Table 4.156 Participated activities by nationality

	British			German			Total		
	n	Row %	*Col. %*	*n*	Row %	*Col. %*	*n*	Row %	*Col. %*
Excursion	58	10.3	16.4	506	89.7	38.7	564	100	34.0
Sightseeing	84	32.7	23.8	173	67.3	13.2	257	100	15.5
Visit other cities	19	13.6	5.4	121	86.4	9.3	140	100	8.4
Shopping	20	18.0	5.7	91	82.0	7.0	111	100	6.7
Business/Work	56	51.9	15.9	52	48.1	4.0	108	100	6.5
Sports	8	9.2	2.3	79	90.8	6.0	87	100	5.2
Archeal. Site vis.	7	13.0	2.0	47	87.0	3.6	54	100	3.3
Swim/Sunbathe	2	3.9	0.6	49	96.1	3.7	51	100	3.1
Museum/Monu.	23	48.9	6.5	24	51.1	1.8	47	100	2.8
Walk/Trek/Mou.	7	15.6	2.0	38	84.4	2.9	45	100	2.7
Dining out	22	66.7	6.2	11	33.3	0.8	33	100	2.0
Anatolian Tour	1	3.3	0.3	29	96.7	2.2	30	100	1.8
Boat Trip	10	41.7	2.8	14	58.3	1.1	24	100	1.4
Vis. Friend &R.	11	61.1	3.1	7	38.9	0.5	18	100	1.1
Entertainment	2	12.5	0.6	14	87.5	1.1	16	100	1.0
Turkish Bath	3	25.0	0.8	9	75.0	0.7	12	100	.7
Jeep Safari	-	-	-	12	100	0.9	12	100	.7
Sailing	-	-	-	6	100	0.5	6	100	.4
Meet/Conference	2	40.0	0.6	3	60.0	0.2	5	100	.3
Motor/Cycle tour	-	-	-	5	100	0.4	5	100	.3
Marriage/Wedd.	5	100	1.4	-	-	-	5	100	.3
Contact Locals	-	-	-	3	100	0.2	3	100	.2
Skiing	1	50.0	0.3	1	50.0	0.1	2	100	.1
Exhibition/Fair	1	50.0	0.3	1	50.0	0.1	2	100	.1
None of Above	11	47.8	3.1	12	52.2	0.9	23	100	1.4
Total	n 353	21.3	100	n 1307	78.7	100	n 1660	100	100
	N 205	22.3		N 714	77.7		N 919	100	
	(Case N) N 919 (Responses N) n 1660 p= 0.000								

Participated activities by nation indicated some differences. While most popular activities were sightseeing, excursion and business for British visitors, they were excursion, sightseeing, visiting other cities and shopping for German visitors. As almost all British visitors visited Istanbul and a

number of them were businessperson, 16% of British visitors declared that they dealt with their own business. In addition, most British visitors whatever their actual purpose of visit participated in sightseeing activities in and around the cultural and metropolitan city of Istanbul. Another reason for high percentage of sightseeing British visitors in Istanbul was the shorter length of stay in Turkey. On the other hand, German visitors joined excursion trips, sightseeing tours and visited other cities. German visitors length of stay, particularly in Antalya, was high, and therefore they were able to see long distance attractions such as Pamukkale where is located at 304 km. North-West of Antalya. Since German visitors visited Antalya as well as Istanbul, their activity preferences in these provinces were analysed below (Table 4.156).

The overall visitors did not indicate significant differences between shoulders in terms of the activities they participated while in Turkey. While small decreases were seen in the share of excursion, sightseeing, which were caused by British visitors, and sports activities, which was caused by German visitors, visiting other cities, shopping and business indicated some increases in their share in total in the second shoulder.

Table 4.157 Participated activities and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	n	%	n	%	n	%	n	%	n	%	n	%
Excursion	24	17.3	34	15.9	259	38.0	247	39.5	283	34.5	281	33.5
Sightseeing	34	24.5	50	23.4	94	13.8	79	12.6	128	15.6	129	15.4
Visiting other cities	1	0.7	18	8.4	58	8.5	63	10.1	59	7.2	81	9.7
Shopping	6	4.3	14	6.5	37	5.4	54	8.6	43	5.2	68	8.1
Business/Work	23	16.5	33	15.4	28	4.1	24	3.8	51	6.2	57	6.8
Sports	3	2.2	5	2.3	45	6.6	34	5.4	48	5.8	39	4.6
Archeolo. Site visit	1	0.7	6	2.8	25	3.7	22	3.5	26	3.2	28	3.3
Swim/Sunbath	-	-	2	0.9	27	4.0	22	3.5	27	3.3	24	2.9
Museum/Monument	9	6.5	14	6.5	18	2.6	6	1.0	27	3.3	20	2.4
Walk/Trek/Mount.	2	1.4	5	2.3	17	2.5	21	3.4	19	2.3	26	3.1
Dining out	13	9.4	9	4.2	8	1.2	3	0.5	21	2.6	12	1.4
AnatolianTour	1	0.7	-	-	23	3.4	6	1.0	24	2.9	6	0.7
Boat Trip	5	3.6	5	2.3	7	1.0	7	1.1	12	1.5	12	1.4
V.F.R.	5	3.6	6	2.8	2	0.3	5	0.8	7	0.9	11	1.3
Entertainment	1	0.7	1	0.5	10	1.5	4	0.6	11	1.3	5	0.6
Turkish Bath	1	0.7	2	0.9	4	0.6	5	0.8	5	0.6	7	0.8
Jeep Safari	-	-	-	-	1	0.1	11	1.8	1	0.1	11	1.3
Sailing	-	-	-	-	4	0.6	2	0.3	4	0.5	2	0.2
Meeting/Conference	1	0.7	1	0.5	1	0.1	2	0.3	2	0.2	3	0.4
Motor/Cycle tour	-	-	-	-	2	0.3	3	0.5	2	0.2	3	0.4
Marriage/Wedding	-	-	5	2.3	-	-	-	-	-	-	5	0.6
Contact Locals	-	-	-	-	3	0.4	-	-	3	0.4	-	-
Skiing	1	0.7	-	-	-	-	1	0.2	1	0.1	1	0.1
Exhibition/Fair	-	-	1	0.5	1	0.1	-	-	1	0.1	1	0.1
None of Above	8	5.8	3	1.4	8	1.2	4	0.6	16	1.9	7	0.8
Total	139	100	214	100	682	100	625	100	821	100	839	100
	N 89		N 116		N 377		N 337		N 466		N 453	
	N 205 p=0.175 n 353				N 714 p=0.000 n 1307				N 919 p=0.000 n 1660			
	N No of cases (visitors) n No of responses											

The first three important activities for British visitors were sightseeing, excursion and business respectively in both shoulders. A significant increase was seen in the share of British visitors who visited other cities other than their actual destination in the second shoulder. Their share increased from 1% in the first shoulder to 8% in the second shoulder. Other important activities for British visitors were dining-out, shopping, visiting museums, mosques and monuments, visiting friends, relatives, and boat trip on the Bosphorus. British visitors generally preferred activities which can be fulfilled in a short period of time, such as museum, mosque visits, and which can be attended after completing their primary business, such as dining-out and boat trip.

The most popular activities for German visitors were excursion, sightseeing and visiting other cities respectively in both shoulders. While most excursions and other city visits were realised by German visitors to Antalya, the high proportion of sightseeing activities recorded in Istanbul. Other important activities were shopping, sports, business, swimming, sunbathing, and archaeological site visits. Since German visitors visited both Istanbul and Antalya, they indicated differences in their activities of preference compared to British visitors. German visitors' performed activities which requires certain period of time such as excursion visit to Pamukkale where they spent at least one night as well as activities which requires shorter time such as shopping, sports, swimming and sunbathing (Table 4.157).

Table 4.158 explains the association of participated activities with actual destination. Overall visitors in Istanbul and Antalya indicated differences in activities they participated while in Turkey. While popular activities were identified as sightseeing, excursion, business, shopping, museum, mosque, monument visit, visiting other cities and dining-out in Istanbul, they were excursion, visiting other cities, sightseeing, sports, shopping, swimming, sunbathing and archaeological site visit in Antalya. Although overall visitors to Istanbul and Antalya engaged in cultural activities mainly, depending on the attractions of destination province and neighbouring cities and the time of visitors, they engaged different activities in each location. For example, while some visitors engaging business and visiting various museums, mosques and palaces in Istanbul, visitors swam, sunbathed, visited archaeological sites and other natural attractions in and around Antalya.

As mentioned above, most popular activities for British visitors in Istanbul were sightseeing, excursion, business, museum, mosque, monument visits, shopping, dining-out and visiting other cities. Excluding business, cultural interests and activities were popular among most British visitors. On the other hand, German visitors who visited both survey places indicated different tastes in terms of activities they participated in Istanbul and Antalya. While cultural and business activities were dominant in Istanbul, sports, resting, shopping were outstanding activities as well as cultural activities in Antalya (Table 4.158).

Table 4.158 Participated activities and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
Excursion	57	16.5	1	12.5	79	23.0	427	44.3	136	19.8	428	44.0
Sightseeing	82	23.8	2	25.0	90	26.2	83	8.6	172	25.0	85	8.7
Visiting other cities	19	5.5	-	-	13	3.8	108	11.2	32	4.7	108	11.1
Shopping	20	5.8	-	-	33	9.6	58	6.0	53	7.7	58	6.0
Business/Work	56	16.2	-	-	50	14.6	2	0.2	106	15.4	2	0.2
Sports	6	1.7	2	25.0	6	1.7	73	7.6	12	1.7	75	7.7
Archeolo. Site visit	7	2.0	-	-	7	2.0	40	4.1	14	2.0	40	4.1
Swim/Sunbath	-	-	2	25.0	1	0.3	48	5.0	1	0.1	50	5.1
Museum/Monument	23	6.7	-	-	17	5.0	7	0.7	40	5.8	7	0.7
Walk/Trek/Mount.	7	2.0	-	-	6	1.7	32	3.3	13	1.9	32	3.3
Dining out	22	6.4	-	-	7	2.0	4	0.4	29	4.2	4	0.4
AnatolianTour	1	0.3	-	-	8	2.3	21	2.2	9	1.3	21	2.2
Boat Trip	10	2.9	-	-	7	2.0	7	0.7	17	2.5	7	0.7
V.F.R.	11	3.2	-	-	6	1.7	1	0.1	17	2.5	1	0.1
Entertainment	2	0.6	-	-	3	0.9	11	1.1	5	0.7	11	1.1
Turkish Bath	2	0.6	1	12.5	1	0.3	8	0.8	3	0.4	9	0.9
Jeep Safari	-	-	-	-	-	-	12	1.2	-	-	12	1.2
Sailing	-	-	-	-	1	0.3	5	0.5	1	0.1	5	0.5
Meeting/Conference	2	0.6	-	-	3	0.9	-	-	5	0.7	-	-
Motor/Cycle tour	-	-	-	-	-	-	5	0.5	-	-	5	0.5
Marriage/Wedding	5	1.4	-	-	-	-	-	-	5	0.7	-	-
Contact Locals	-	-	-	-	-	-	3	0.3	-	-	3	0.3
Skiing	1	0.3	-	-	1	0.3	-	-	2	0.3	-	-
Exhibition/Fair	1	0.3	-	-	1	0.3	-	-	2	0.3	-	-
None of Above	11	3.2	-	-	3	0.9	9	0.9	14	2.0	9	0.9
Total	345	100	8	100	343	100	964	100	688	100	972	100
	N 202		N 3		N 215		N 499		N 417		N 502	
	N 205 p=0.855 n 353				N 714 p=0.000 n 1307				N 919 p=0.000 n 1660			
	N No of cases (visitors) n No of responses											

Visitors' impressions about facilities and staff

Around 60% of overall visitors declared that they found facilities, services, staff, and Turkish people very good or good in Turkey (Table 4.159). Only 6% of them stated that facilities staff and people poor or very poor. The table shows that visitors were appreciated and experienced the high service quality and behaviour of staff and traditional hospitality of Turkish people more than the facilities provided. 75% of visitors graded facilities average or above average and it was 86% for the staff and Turkish people. It should be kept in mind that the proportion of impression statements about Turkish people and their hospitality were rather small compared to impressions about staff.

While highest grades were given to accommodation and restaurant facilities and staff, the proportion of visitors who graded sanitary conditions and facilities, lack of information provision, coach drivers and tour guides poor or very poor were not at ignorable level. 67% of visitors stated that they did not use any health services. As high as 95% of overall visitors graded accommodation and restaurant facilities and staff average and very good or good. It was understood that more and special attention should be given to improvement of sanitary conditions and facilities, better and

widespread provision of information, transport facilities and education and training of tour guides and coach drivers.

Table 4.159 Overall impressions about facilities and staff

	Overall impressions about facilities and staff									
	Good Very Good		Average		Poor Very Poor		Do not Know		Total	
FACILITIES	n	%	n	%	n	%	n	%	n	%
Accommodation	809	79.0	163	15.9	16	1.6	36	3.5	1024	100
Restaurant	756	75.9	192	19.3	28	2.8	20	2.0	996	100
Transport	543	54.1	218	21.7	83	8.3	160	15.9	1004	100
Sanitary	434	43.5	320	32.1	217	21.7	27	2.7	998	100
Security	618	61.4	193	19.2	55	5.5	141	14.0	1007	100
Health	188	18.8	99	9.9	39	3.9	674	67.4	1000	100
Information	492	48.8	222	22.0	85	8.4	210	20.8	1009	100
Other	22	57.9	7	18.4	5	13.2	4	10.5	38	100
TOTAL	3862	54.6	1414	20.0	528	7.5	1272	18.0	7076	100
STAFF & PEOPLE										
Accommodation	718	79.7	137	15.2	14	1.6	32	3.6	901	100
Restaurant	700	79.0	152	17.2	16	1.8	18	2.0	886	100
Tour guides	497	56.2	126	14.2	43	4.9	219	24.7	885	100
Drivers (coach)	586	66.1	140	15.8	56	6.3	104	11.7	886	100
Other	27	64.3	6	14.3	6	14.3	3	7.1	42	100
TOTAL	2528	70.2	561	15.6	135	3.8	376	10.4	3600	100
Facilities & Staff (Combined)	6390	59.9	1975	18.5	663	6.2	1648	15.4	10676	100
	n No of responses									

Although small differences were recorded in visitors' impressions between shoulders, large differences were seen by nationality and by survey place (Table 4.160). The table shows that German visitors did have better impressions about facilities provided compared to British visitors. That was confirmed by the visitors in Antalya where visited mostly by German visitors. Another indicator for this statement was the 10.1% of British visitors who graded the facilities as poor or very poor compared to 7% of German visitors. Against 66% of British visitors, 77% of German visitors stated that facilities were average and above average. This was partly reflected to figures in Istanbul and Antalya. While 62% of visitors to Antalya who were mainly German indicated that facilities were average and above average, the proportion of visitors who did have average or above average impressions in Istanbul was rather low, 46%. As a consequence, in general, German visitors and visitors to Antalya whose majority of them were German better impressed by the facilities provided.

The same results were reflected to proportion of visitors' impressions about staff and Turkish people. German visitors and visitors to Antalya were better impressed about staff and Turkish people than British visitors. 86% of overall visitors stated that staff and traditional Turkish hospitality were average and above. As Table 4.160 indicates larger proportion of overall visitors, 86%, were better impressed about staff and Turkish people compared to impressions of visitors about facilities provided, 75%.

Table 4.160 Impressions about facilities and staff by nationality, shoulder season and survey place

	Impressions about facilities and staff											
	Good Very Good		Average		Poor Very Poor		Do not Know		Response Total		Case Total	
FACILITIES	n	%	n	%	n	%	n	%	n	%	N	%
British	691	44.0	350	22.3	159	10.1	371	23.6	1571	22.2	225	22.0
German	3171	57.6	1064	19.3	369	6.7	901	16.4	5505	77.8	800	78.0
TOTAL	3862	54.6	1414	20.0	528	7.5	1272	18.0	7076	100	1025	100
1st shoulder	2025	55.3	716	19.6	264	7.2	654	17.9	3659	51.7	530	51.7
2nd shoulder	1837	53.8	698	20.4	264	7.7	618	18.1	3417	48.3	495	48.3
TOTAL	3862	54.6	1414	20.0	528	7.5	1272	18.0	7076	100	1025	100
Istanbul	1409	45.5	744	24.0	310	10.0	637	20.5	3100	43.8	452	44.1
Antalya	2453	61.7	670	16.9	218	5.5	635	16.0	3976	56.2	573	55.9
TOTAL	3862	54.6	1414	20.0	528	7.5	1272	18.0	7076	100	1025	100
STAFF & PEOPLE	n	%	n	%	n	%	n	%	n	%	N	%
British	525	58.8	147	16.5	56	6.3	165	18.5	893	24.8	221	24.2
German	2003	74.0	414	15.3	79	2.9	211	7.8	2707	75.2	692	75.8
TOTAL	2528	70.2	561	15.6	135	3.8	376	10.4	3600	100	913	100
1st shoulder	1287	69.8	293	15.9	66	3.6	199	10.8	1845	51.3	472	51.7
2nd shoulder	1241	70.7	268	15.3	69	3.9	177	10.1	1755	48.8	441	48.3
TOTAL	2528	70.2	561	15.6	135	3.8	376	10.4	3600	100	913	100
Istanbul	995	60.8	301	18.4	81	5.0	259	15.8	1636	45.4	416	45.6
Antalya	1533	78.1	260	13.2	54	2.7	117	6.0	1964	54.6	497	54.4
TOTAL	2528	70.2	561	15.6	135	3.8	376	10.4	3600	100	913	100
	N No of cases (visitors) n No of responses											

Table 4.161 British visitors' impressions about facilities and staff by shoulder season and survey place

	Impressions of BRITISH visitors on facilities and staff									
	Good Very Good		Average		Poor Very Poor		Do not Know		Response Total	
FACILITIES	n	%	n	%	n	%	n	%	n	%
1st shoulder	342	47.2	150	20.7	72	9.9	161	22.2	725	46.1
2nd shoulder	349	41.3	200	23.6	87	10.3	210	24.8	846	53.9
TOTAL	691	44.0	350	22.3	159	10.1	371	23.6	1571	100
Istanbul	679	44.0	347	22.5	156	10.1	362	23.4	1544	98.3
Antalya	12	44.4	3	11.1	3	11.1	9	33.3	27	1.7
TOTAL	691	44.0	350	22.3	159	10.1	371	23.6	1571	100
STAFF & PEOPLE	n	%	n	%	n	%	n	%	n	%
1st shoulder	255	61.0	72	17.2	22	5.3	69	16.5	418	46.8
2nd shoulder	270	56.8	75	15.8	34	7.2	96	20.2	475	53.2
TOTAL	525	58.8	147	16.5	56	6.3	165	18.5	893	100
Istanbul	515	58.7	146	16.6	56	6.4	160	18.2	877	98.2
Antalya	10	62.5	1	6.3	-	-	5	31.3	16	1.8
TOTAL	525	58.8	147	16.5	56	6.3	165	18.5	893	100
	N No of cases (visitors) n No of responses									

Against 75% British visitors, as high as 89% of German visitors graded staff and Turkish people average, good or very good. In the same way, while 91% of visitors to Antalya grading staff and people average, good or very good, that was 79% in Istanbul. No significant differences were

identified in impressions of visitors about staff and people in Turkey. 86% of visitors in first and second shoulder were better impressed. While most of happy and appreciated visitors were identified as German visitors and visitors in Antalya who were mainly German as well, majority of visitors who graded staff and people poor and very poor were British visitors and visitors in Istanbul. Therefore, needs, requirements of and physical facility and service standards demanded by British and German visitors, the reasons for low graded facilities and services should be identified separately and necessary improvement measures must be taken. The minimum standards should meet all nationalities' requirements.

Table 4.162 German visitors' impressions about facilities & staff by shoulder season and survey place

	Impressions of GERMAN visitors on facilities and staff									
	Good Very Good		Average		Poor Very Poor		Do not Know		Response Total	
FACILITIES	n	%	n	%	n	%	n	%	n	%
1st shoulder	1683	57.4	566	19.3	192	6.5	493	16.8	2934	53.3
2nd shoulder	1488	57.9	498	19.4	177	6.9	408	15.9	2571	46.7
TOTAL	3171	57.6	1064	19.3	369	6.7	901	16.4	5505	100
Istanbul	730	46.9	397	25.5	154	9.9	275	17.7	1556	28.3
Antalya	2441	61.8	667	16.9	215	5.4	626	15.9	3949	71.7
TOTAL	3171	57.6	1064	19.3	369	6.7	901	16.4	5505	100
STAFF & PEOPLE	n	%	n	%	n	%	n	%	n	%
1st shoulder	1032	72.3	221	15.5	44	3.1	130	9.1	1427	52.7
2nd shoulder	971	75.9	193	15.1	35	2.7	81	6.3	1280	47.3
TOTAL	2003	74.0	414	15.3	79	2.9	211	7.8	2707	100
Istanbul	480	63.2	155	20.4	25	3.3	99	13.0	759	28.0
Antalya	1523	78.2	259	13.3	54	2.8	112	5.7	1948	72.0
TOTAL	2003	74.0	414	15.3	79	2.9	211	7.8	2707	100
	N No of cases (visitors) n No of responses									

Visitors' expenditures in Turkey

Differences existed between British and German visitors in terms of their expenditures in Turkey (Table 4.163). More than 55% of overall visitors' expenditures were in the lower expenditure groups which were between £1-£500. Most of the remaining visitors spend between £501 and £2500 while in Turkey. The share of overall visitors who spend more than £2500 was only 1%. On the other hand, the share of British and German visitors in each expenditure groups indicated differences. The level of British visitors' expenditure was quite low compared to German visitors. Against 76% of British visitors, only 48% for German visitors spend under £500. The main reasons for low expenditure level of British visitors were probably the shorter length of stay in Turkey compared to German visitors and the important place of business as purpose of visit. As almost all expenditures of business travellers usually paid by their company, they only pay for extras, such as entertainment and leisure activities. In addition, as Table 4.165 illustrates, general expenditure level was lower in Istanbul compared to Antalya.

Table 4.163 Amount of expenditures in Turkey by nationality

	British		German		Total	
	n	%	*n*	%	*n*	%
£1 - £250	54	41.2	49	13.2	103	20.5
£251 - £500	46	35.1	130	35.0	176	35.1
£501 - £750	15	11.5	63	17.0	78	15.5
£751 - £1000	12	9.2	51	13.7	63	12.5
£1001 - £2500	2	1.5	74	19.9	76	15.1
£2501 - £5000	2	1.5	2	0.5	4	0.8
£5001 - £10000	-	-	2	0.5	2	0.4
Total	n 131	100	n 371	100	n 502	100
	N 131		N 371		N 502	
	(Case N) N 131 (Responses N) n 131 p= 0.000 cN and rN are equals as each respondent declared only one group of expenditure above					

Although British visitors' expenditure did not show noteworthy differences between shoulders, German visitors and overall visitors indicated some notable changes in their expenditure in Turkey (Table 4.164). An exceptional decrease was seen in the amount of German and overall visitors' expenditures in the second shoulder. British visitors spend slightly more in the first shoulder. While the share of overall visitors who spent less than £500 increased from 49% in the first shoulder to 64% in the second shoulder, and German visitors' share from 40% to 60%, British visitors' share whose expenditures were below £500 decreased from 79% to 74% in the second shoulder. In other words, overall and German visitors in the first shoulder, and British visitors in the second shoulder were recorded as high spenders. In addition, the level of British expenditures was quite below German and overall visitors' expenditure level in both shoulders.

The amount of expenditure by destination province indicated differences (Table 4.165). As mentioned above, visitors in Istanbul spent less money than visitors in Antalya and British visitors spent lesser money in comparison with German and overall visitors. 57% share of overall and German visitors to Antalya who spent more than £500 dramatically reduced to 34% for overall visitors and 43% for German visitors in Istanbul. In other words, overall, German and also British visitors spent considerably low in Istanbul compared to Antalya. However, once again, the expenditures of German visitors in Istanbul were quite higher than British visitors. While the share of German visitors who spent more than £500 was 43% in total, it was recorded as only 23% for British visitors. This shows the existence of differences between two different tourist markets in the same destination, Istanbul, and in same tourist market to two different destinations, German visitors to Istanbul and Antalya. Therefore, visitors, in particular British visitors, should be encouraged to spend more time and money in Istanbul and other provinces by taking necessary measures such as special holiday and tour programmes and cheap prices policy for longer holidays besides keeping current short-break holiday and business market.

Table 4.164 Amount of expenditures in Turkey and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	n	%	n	%	n	%	n	%	n	%	n	%
£1 - £250	25	41.0	29	41.4	21	9.6	28	18.3	46	16.5	57	25.6
£251 - £500	23	37.7	23	32.9	67	30.7	63	41.2	90	32.3	86	38.6
£501 - £750	7	11.5	8	11.4	37	17.0	26	17.0	44	15.8	34	15.2
£751 - £1000	5	8.2	7	10.0	39	17.9	12	7.8	44	15.8	19	8.5
£1001 - £2500	-	-	2	2.9	51	23.4	23	15.0	51	18.3	25	11.2
£2501 - £5000	1	1.6	1	1.4	2	0.9	-	-	3	1.1	1	0.4
£5001 - £10000	-	-	-	-	1	0.5	1	0.7	1	0.4	1	0.4
Total	61	100	70	100	218	100	153	100	279	100	223	100
	N 61		N 70		N 218		N 153		N 279		N 223	
	N 131 p=0.837 n 131				N 371 p=0.008 n 371				N 502 p=0.019 n 502			
	N No of cases (visitors) n No of responses											

Table 4.165 Amount of expenditures in Turkey and survey place by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
£1 - £250	54	41.9	-	-	28	20.4	21	9.0	82	30.8	21	8.9
£251 - £500	45	34.9	1	50.0	50	36.5	80	34.2	95	35.7	81	34.3
£501 - £750	14	10.9	1	50.0	20	14.6	43	18.4	34	12.8	44	18.6
£751 - £1000	12	9.3	-	-	9	6.6	42	17.9	21	7.9	42	17.8
£1001 - £2500	2	1.6	-	-	27	19.7	47	20.1	29	10.9	47	19.9
£2501 - £5000	2	1.6	-	-	1	0.7	1	0.4	3	1.1	1	0.4
£5001 - £10000	-	-	-	-	2	1.5	-	-	2	0.8	-	-
Total	129	100	2	100	137	100	234	100	266	100	236	100
	N 129		N 2		N 137		N 234		N 266		N 236	
	N 131 p=NA n 131				N 371 p=NA n 371				N 502 p=NA n 502			
	N No of cases (visitors) n No of responses											

Visitors' overall comments on various subjects

Distributions of comments made by British and German visitors by groups and by subjects are shown on Table 4.166 and following tables. While 52% of German visitors made positive comments, recommendations and advice, only 34% of British visitors made positive comments. The proportion of comments in the category of advice and negative made by British visitors were significantly higher than German visitors. In other words, while German visitors experienced more trouble-free time in Turkey, British visitors experienced some problems while in Turkey.

76% to 90% of British and German visitors made positive comments to express their enjoyment, pleasure, gratitude, satisfaction and good experience in Turkey (Table 4.167, 216, 217). It was observed that while the proportion of positive comments made by satisfied British visitors was higher in the first shoulder, the proportion of satisfied German visitors were almost same in both shoulders. On the other hand, British and German visitors to Istanbul were slightly more satisfied than visitors to Antalya. The remaining positive comments were distributed between various subjects such as food and beverage, cost of products and services, environment, safety, hotels and general positive comments on Turkey.

Table 4.166 Comments of visitors by survey place and nationality

	GERMAN						GERMAN					
	Istanbul		Antalya		TOTAL		1st shoulder		2nd shoulder		TOTAL	
	n	%	n	%	n	%	n	%	n	%	n	%
Advice	15	15.8	37	11.5	52	12.4	23	11.2	29	13.6	52	12.4
Positive	38	40.0	180	55.7	219	52.3	94	45.9	125	58.4	219	52.3
Negative	42	44.2	106	32.8	148	35.3	88	42.9	60	28.0	148	35.3
TOTAL	95	100	323	100	419	100	205	100	214	100	419	100
	BRITISH						BRITISH					
	Istanbul		Antalya		TOTAL		1st shoulder		2nd shoulder		TOTAL	
	n	%	n	%	n	%	n	%	n	%	n	%
Advice	81	24.0	1	25.0	82	24.0	30	25.6	52	23.2	82	24.0
Positive	116	34.4	-	-	116	34.0	32	27.4	84	37.5	116	34.0
Negative	140	41.6	3	75.0	143	42.0	55	47.0	88	39.3	143	42.0
TOTAL	337	100	4	100	341	100	117	100	224	100	341	100

The negative comments were related to various subjects. The majority of negative comments were made on inadequate and disorganised airport facilities and services, environmental pollution and damages, inadequate and disorganisation of transport facilities and services, insistent salespersons, political instability and various problems experienced by visitors. British visitors' negative comments on above main subjects were almost same in both shoulders. However, German visitors' comments indicated differences between shoulders and between destinations. While German visitors' negative comments on airports, insistent salespersons, hotels and political instability were main subjects in the first shoulder, various disturbance and problems, environmental matters and cost were important negative subjects in the second shoulder. On the other hand, while comments on environment, political uncertainty and tour operators and guides were major negative comments in Istanbul, comments related to airports, various disturbance and problems and insistent salespersons were more important negative subjects in Antalya compared to Istanbul (Figure 4.29, 4.30, 4.31, 4.32, 4.33, 4.34 and Appendix 112, 113, 114).

Table 4.167 Comments of British visitors by subject and shoulder

	BRITISH visitors' comments by shoulder																	
	1st Shoulder						2nd Shoulder						Total					
	Advice		Positive		Negative		Advice		Positive		Negative		Advice		Positive		Negative	
Arch. & Hist. Resou.	1	3.3	-	-	1	1.8	-	-	-	-	-	-	1	1.2	-	-	1	0.7
Airports	4	13.3	-	-	10	18.2	3	5.8	3	3.6	15	17.0	7	8.5	3	2.6	25	17.5
Airline companies	-	-	-	-	-	-	-	-	-	-	1	1.1	-	-	-	-	1	0.7
Cost	-	-	-	-	-	-	1	1.9	2	2.4	1	1.1	1	1.2	2	1.7	1	0.7
Disturbance/problem	4	13.3	-	-	7	12.7	6	11.5	-	-	9	10.2	10	12.2	-	-	16	11.2
Driving	1	3.3	-	-	1	1.8	-	-	-	-	1	1.1	1	1.2	-	-	2	1.4
Enjoyment/Pleasure	-	-	28	87.5	-	-	1	1.9	64	76.2		-	1	1.2	92	79.3	-	-
Environment	2	6.7	-	-	4	7.3	13	25.0	3	3.6	16	18.2	15	18.3	3	2.6	20	14.0
Food & Beverage	-	-	3	9.4	3	5.5	-	-	1	1.2	3	3.4	-	-	4	3.4	6	4.2
Health	2	6.7	-	-	2	3.6	1	1.9	-	-	1	1.1	3	3.7	-	-	3	2.1
Hotels (Accomm.)	4	13.3	-	-	5	9.1	1	1.9	-	-	1	1.1	5	6.1	-	-	6	4.2
Prov. of Information	2	6.7	-	-	3	5.5	4	7.7	-	-	4	4.5	6	7.3	-	-	7	4.9
Infrastructure	1	3.3	-	-	1	1.8	6	11.5	-	-	6	6.8	7	8.5	-	-	7	4.9
Other	1	3.3	-	-	2	3.6	2	3.8	-	-	2	2.3	3	3.7	-	-	4	2.8
Political comments	2	6.7	-	-	2	3.6	-	-	-	-	1	1.1	2	2.4	-	-	3	2.1
Safety	-	-	1	3.1	-	-	-	-	3	3.6		-	-	-	4	3.4	-	-
Salespersons	-	-	-	-	7	12.7	-	-	-	-	10	11.4	-	-	-	-	17	11.9
Taxi services	-	-	-	-	-	-	-	-	-	-	8	9.1	-	-	-	-	8	5.6
Tour op./Tour guide	1	3.3	-	-	2	3.6	-	-	-	-	2	2.3	1	1.2	-	-	4	2.8
Transport	5	16.7	-	-	5	9.1	7	13.5	1	1.2	7	8.0	12	14.6	1	0.9	12	8.4
Turkey (general)	-	-	-	-	-	-	7	13.5	7	8.3	-	-	7	8.5	7	6.0	-	-
Total	30	100	32	100	55	100	52	100	84	100	88	100	82	100	116	100	143	100

Table 4.168 Comments of British visitors by subject and survey place

	BRITISH visitors' comments by survey place																	
	Istanbul						Antalya						Total					
	Advice		Positive		Negative		Advice		Positive		Negative		Advice		Positive		Negative	
Arch. & Hist. Resou.	1	1.2	-	-	1	0.7	-	-	-	-	-	-	1	1.2	-	-	1	0.7
Airports	7	8.6	3	2.6	25	17.9	-	-	-	-	-	-	7	8.5	3	2.6	25	17.5
Airline companies	-	-	-	-	1	0.7	-	-	-	-	-	-	-	-	-	-	1	0.7
Cost	1	1.2	2	1.7	1	0.7	-	-	-	-	-	-	1	1.2	2	1.7	1	0.7
Disturbance/problem	10	12.3	-	-	15	10.7	-	-	-	-	1	33.3	10	12.2	0	0.0	16	11.2
Driving	1	1.2	-	-	2	1.4	-	-	-	-	-	-	1	1.2	0	0.0	2	1.4
Enjoyment/Pleasure	1	1.2	92	79.3	0	0.0	-	-	-	-	-	-	1	1.2	92	79.3	0	0.0
Environment	15	18.5	3	2.6	20	14.3	-	-	-	-	-	-	15	18.3	3	2.6	20	14.0
Food & Beverage	-	-	4	3.4	5	3.6	-	-	-	-	1	33.3	-	-	4	3.4	6	4.2
Health	2	2.5	-	-	2	1.4	1	100	-	-	1	33.3	3	3.7	-	-	3	2.1
Hotels (Accomm.)	5	6.2	-	-	6	4.3	-	-	-	-	-	-	5	6.1	-	-	6	4.2
Prov. of Information	6	7.4	-	-	7	5.0	-	-	-	-	-	-	6	7.3	-	-	7	4.9
Infrastructure	7	8.6	-	-	7	5.0	-	-	-	-	-	-	7	8.5	-	-	7	4.9
Other	3	3.7	-	-	4	2.9	-	-	-	-	-	-	3	3.7	-	-	4	2.8
Political comments	2	2.5	-	-	3	2.1	-	-	-	-	-	-	2	2.4	-	-	3	2.1
Safety	-	-	4	3.4	0	0.0	-	-	-	-	-	-	-	-	4	3.4	0	0.0
Salespersons	-	-	-	-	17	12.1	-	-	-	-	-	-	-	-	-	-	17	11.9
Taxi services	-	-	-	-	8	5.7	-	-	-	-	-	-	-	-	-	-	8	5.6
Tour op./Tour guide	1	1.2	-	-	4	2.9	-	-	-	-	-	-	1	1.2	-	-	4	2.8
Transport	12	14.8	1	0.9	12	8.6	-	-	-	-	-	-	12	14.6	1	0.9	12	8.4
Turkey (general)	7	8.6	7	6.0	0	0.0	-	-	-	-	-	-	7	8.5	7	6.0	0	0.0
Total	81	100	116	100	140	100	1	100	-	-	3	100	82	100	116	100	143	100

Table 4.169 Comments of German visitors by subject and shoulder

	GERMAN visitors' comments by shoulder																	
	1st Shoulder						2nd Shoulder						Total					
	Advice		Positive		Negative		Advice		Positive		Negative		Advice		Positive		Negative	
Arch. & Hist. Resou.	2	8.7	-	-	5	5.7	-	-	-	-	-	-	2	3.8	-	-	5	3.4
Airports	2	8.7	-	-	14	15.9	-	-	-	-	4	6.7	2	3.8	-	-	18	12.2
Airline companies	-	-	1	1.1	2	2.3	-	-	-	-	2	3.3	-	-	1	0.5	4	2.7
Cost	1	4.3	4	4.3	1	1.1	-	-	1	0.8	5	8.3	1	1.9	5	2.3	6	4.1
Disturbance/problem	1	4.3	-	-	6	6.8	1	3.4	-	-	6	10.0	2	3.8	-	-	12	8.1
Driving	-	-	-	-	1	1.1	-	-	-	-	-	-	-	-	-	-	1	0.7
Enjoyment/Pleasure	-	-	80	85.1	-	-	-	-	107	85.6	-	-	-	-	187	85.4	-	-
Environment	2	8.7	-	-	8	9.1	16	55.2	5	4.0	21	35.0	18	34.6	5	2.3	29	19.6
Food & Beverage	-	-	3	3.2	-	-	-	-	2	1.6	1	1.7	-	-	5	2.3	1	0.7
Health	-	-	-	-	-	-	2	6.9	-	-	3	5.0	2	3.8	-	-	3	2.0
Hotels (Accomm.)	2	8.7	1	1.1	4	4.5	1	3.4	-	-	1	1.7	3	5.8	1	0.5	5	3.4
Prov. of Information	3	13.0	-	-	3	3.4	-	-	-	-	-	-	3	5.8	-	-	3	2.0
Infrastructure	1	4.3	-	-	1	1.1	-	-	-	-	-	-	1	1.9	-	-	1	0.7
Other	5	21.7	-	-	3	3.4	1	3.4	1	0.8	3	5.0	6	11.5	1	0.5	6	4.1
Political comments	-	-	-	-	16	18.2	-	-	-	-	1	1.7	-	-	-	-	17	11.5
Safety	-	-	4	4.3	-	-	-	-	-	-	-	-	-	-	4	1.8	-	-
Salespersons	-	-	-	-	16	18.2	-	-	-	-	7	11.7	-	-	-	-	23	15.5
Taxi services	-	-	-	-	2	2.3	-	-	-	-	1	1.7	-	-	-	-	3	2.0
Tour op./Tour guide	2	8.7	-	-	5	5.7	-	-	1	0.8	4	6.7	2	3.8	1	0.5	9	6.1
Transport	1	4.3	-	-	1	1.1	1	3.4	1	0.8	1	1.7	2	3.8	1	0.5	2	1.4
Turkey (general)	1	4.3	1	1.1	-	-	7	24.1	7	5.6	-	-	8	15.4	8	3.7	-	-
Total	23	100	94	100	88	100	29	100	125	100	60	100	52	100	219	100	148	100

Table 4.170 Comments of German visitors by subject and survey place

	GERMAN visitors' comments by survey place																	
	Istanbul						Antalya						Total					
	Advice		Positive		Negative		Advice		Positive		Negative		Advice		Positive		Negative	
Arch. & Hist. Resou.	-	-	-	-	-	-	2	5.4	-	-	5	4.7	2	3.8	-	-	5	3.4
Airports	-	-	-	-	3	7.1	2	5.4	-	-	15	14.2	2	3.8	-	-	18	12.2
Airline companies	-	-	-	-	2	4.8		-	-	-	2	1.9	-	-	1	0.5	4	2.7
Cost	-	-	-	-	2	4.8	1	2.7	5	2.8	4	3.8	1	1.9	5	2.3	6	4.1
Disturbance/problem	-	-	-	-	1	2.4	2	5.4	-	-	11	10.4	2	3.8	-	-	12	8.1
Driving	-	-	-	-	-	-	-	-	-	-	1	0.9	-	-	-	-	1	0.7
Enjoyment/Pleasure	-	-	35	89.7	-	-	-	-	152	84.4	-	-	-	-	187	85.4	-	-
Environment	5	33.3	-	-	10	23.8	13	35.1	5	2.8	19	17.9	18	34.6	5	2.3	29	19.6
Food & Beverage	-	-	-	-	-	-	-	-	5	2.8	1	0.9	-	-	5	2.3	1	0.7
Health	2	13.3	-	-	2	4.8	-	-	-	-	1	0.9	2	3.8	-	-	3	2.0
Hotels (Accomm.)	1	6.7	-	-	1	2.4	2	5.4	1	0.6	4	3.8	3	5.8	1	0.5	5	3.4
Prov. of Information	1	6.7	-	-	1	2.4	2	5.4	-	-	2	1.9	3	5.8	-	-	3	2.0
Infrastructure	1	6.7	-	-	1	2.4	-	-	-	-			1	1.9	-	-	1	0.7
Other	2	13.3	-	-	4	9.5	4	10.8	1	0.6	2	1.9	6	11.5	1	0.5	6	4.1
Political comments	-	-	-	-	6	14.3	-	-	-	-	11	10.4	-	-	-	-	17	11.5
Safety	-	-	1	2.6	-	-	-	-	3	1.7	-	-	-	-	4	1.8	-	-
Salespersons	-	-	-	-	2	4.8	-	-	-	-	21	19.8	-	-	-	-	23	15.5
Taxi services	-	-	-	-	3	7.1	-	-	-	-	-	-	-	-	-	-	3	2.0
Tour op./Tour guide	-	-	-	-	3	7.1	2	5.4	1	0.6	6	5.7	2	3.8	1	0.5	9	6.1
Transport	1	6.7	-	-	1	2.4	1	2.7	1	0.6	1	0.9	2	3.8	1	0.5	2	1.4
Turkey (general)	2	13.3	2	5.1	-	-	6	16.2	6	3.3	-	-	8	15.4	8	3.7	-	-
Total	15	100	39	100	42	100	37	100	180	100	106	100	52	100	219	100	148	100

Figure 4.29 Preferential characteristics of overall visitors by shoulder

(See also Appendix 112, 113, 114)

OVERALL OFF-SEASON MARKET'S
PREFERENTIAL CHARACTERISTICS WHILE IN TURKEY **BY SHOULDER**

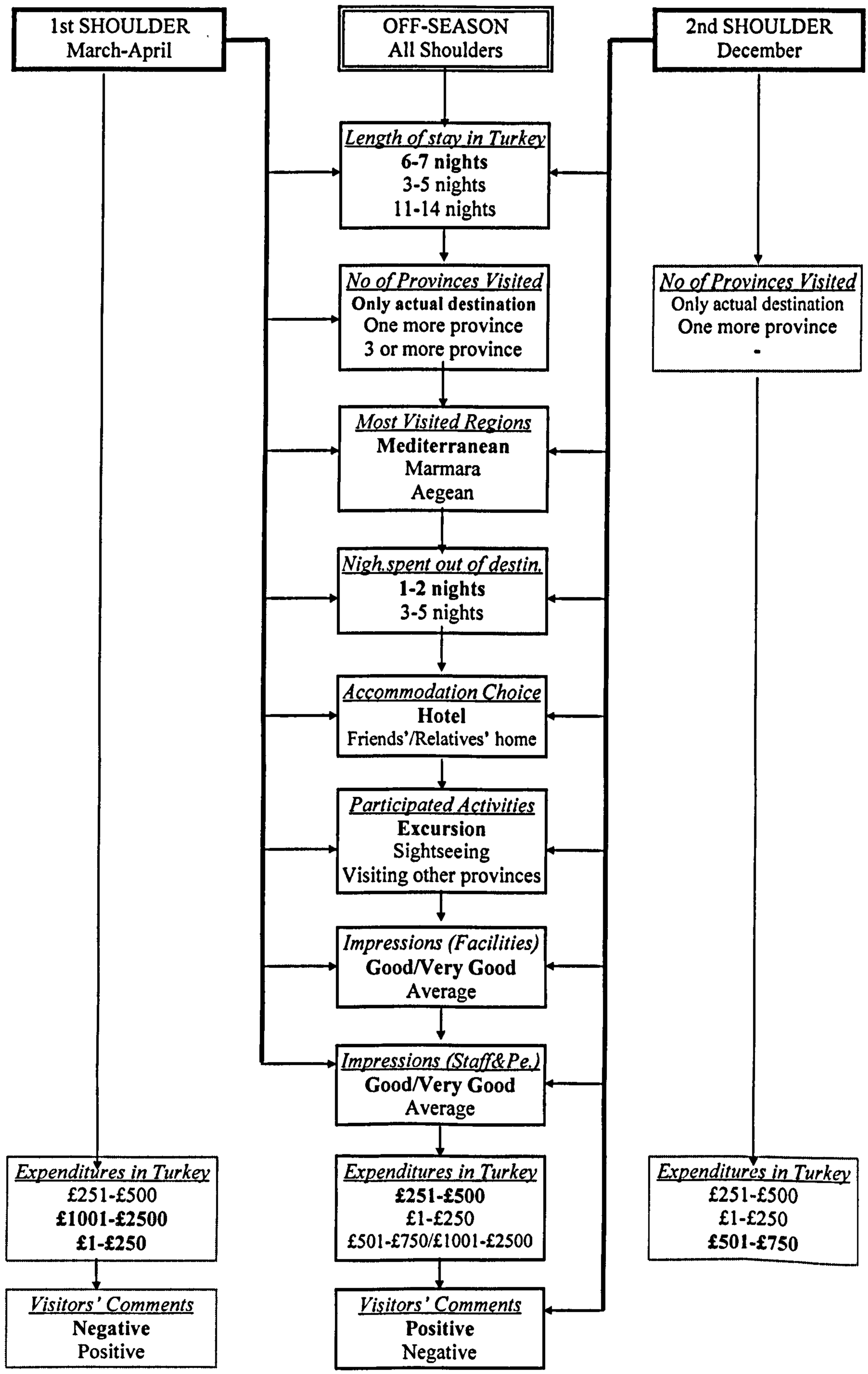


Figure 4.30 Preferential characteristics of British visitors by shoulder

(*See also Appendix 112, 113, 114*)

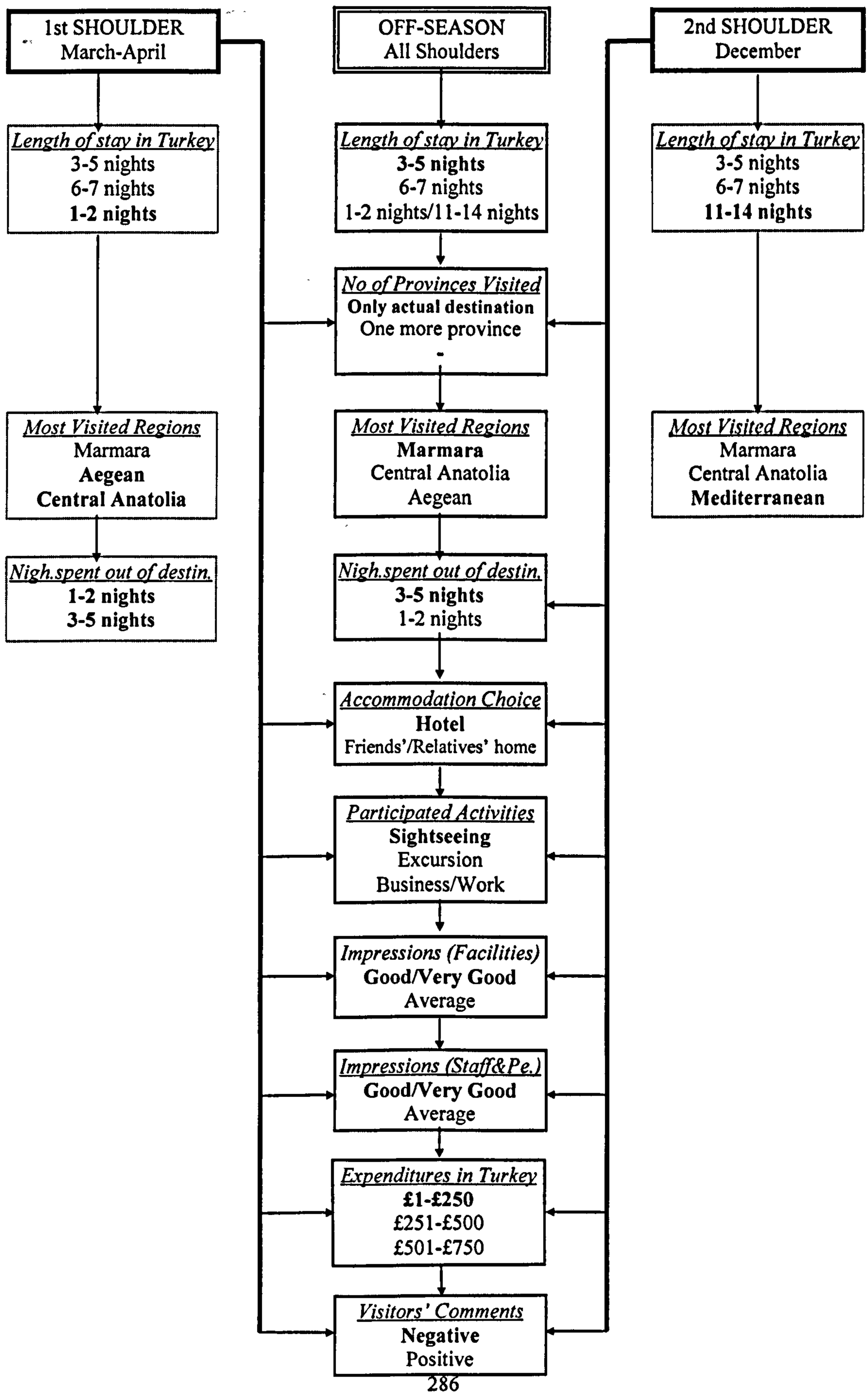


Figure 4.31 Preferential characteristics of German visitors by shoulder

(*See also Appendix 112, 113, 114*)

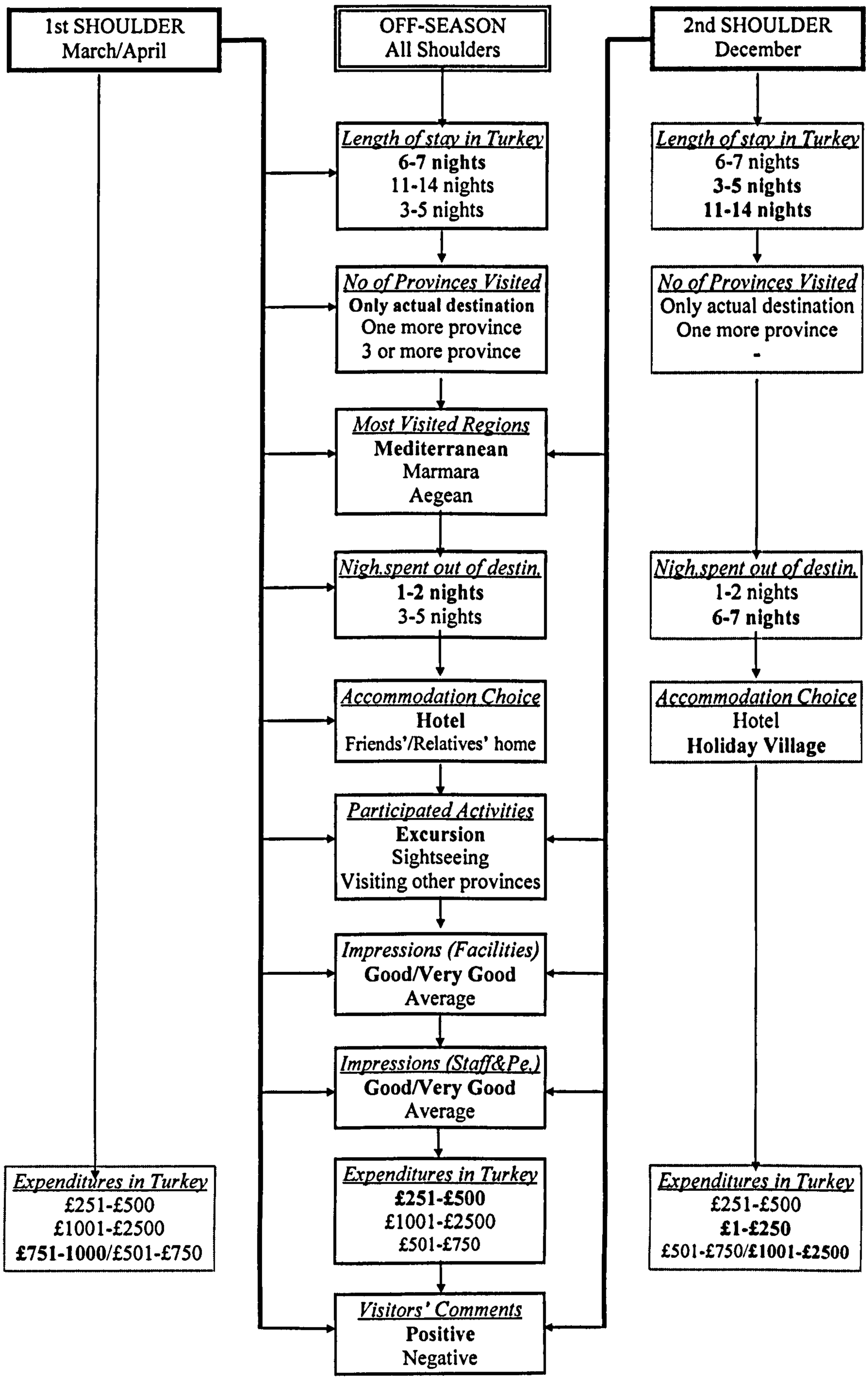


Figure 4.32 Preferential characteristics of overall visitors by destination

(*See also Appendix 112, 113, 114*)

OVERALL OFF-SEASON MARKET'S PREFERENTIAL CHARACTERISTICS WHILE IN TURKEY BY DESTINATION

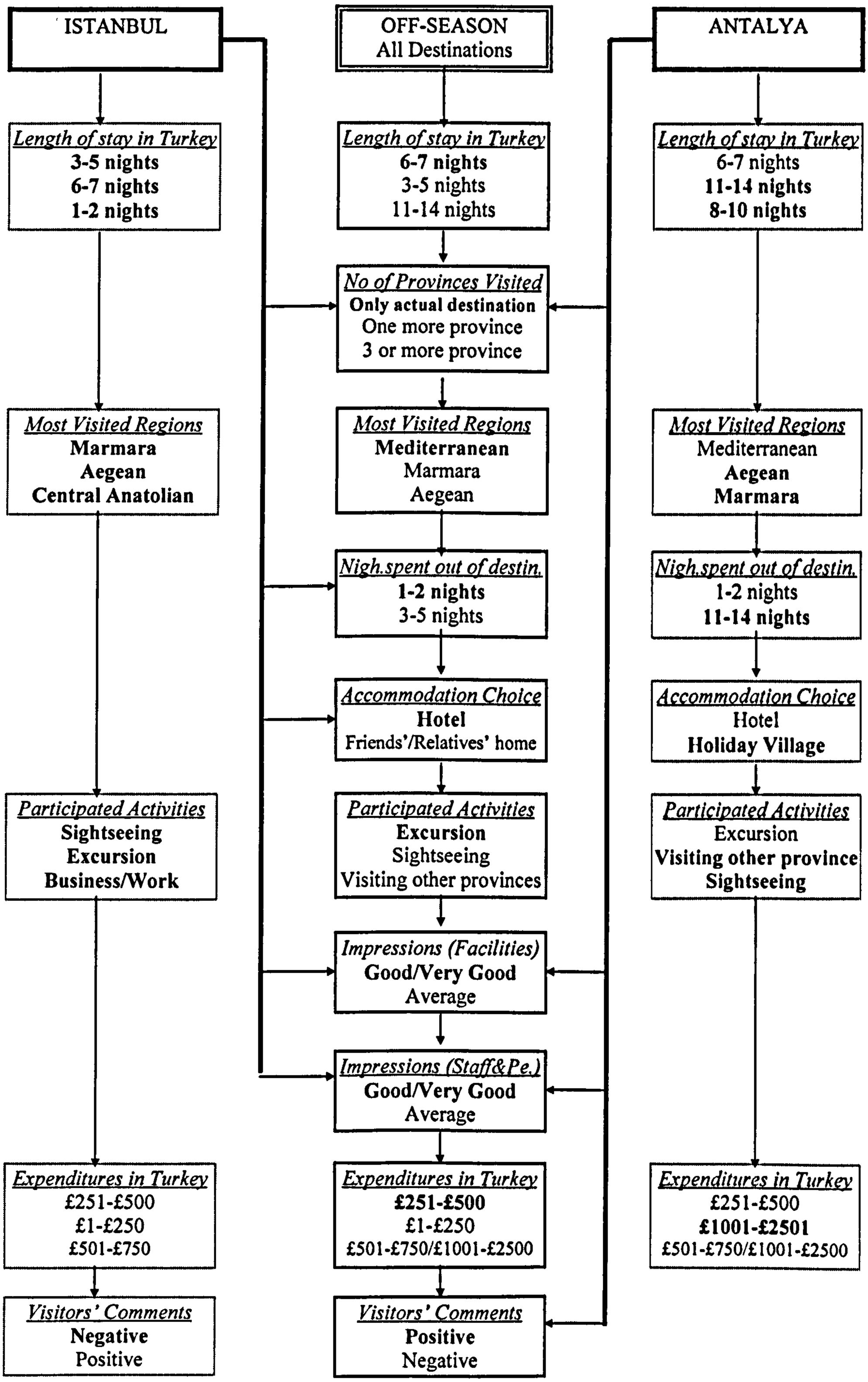


Figure 4.33 Preferential characteristics of British visitors by destination

(See also Appendix 112, 113, 114)

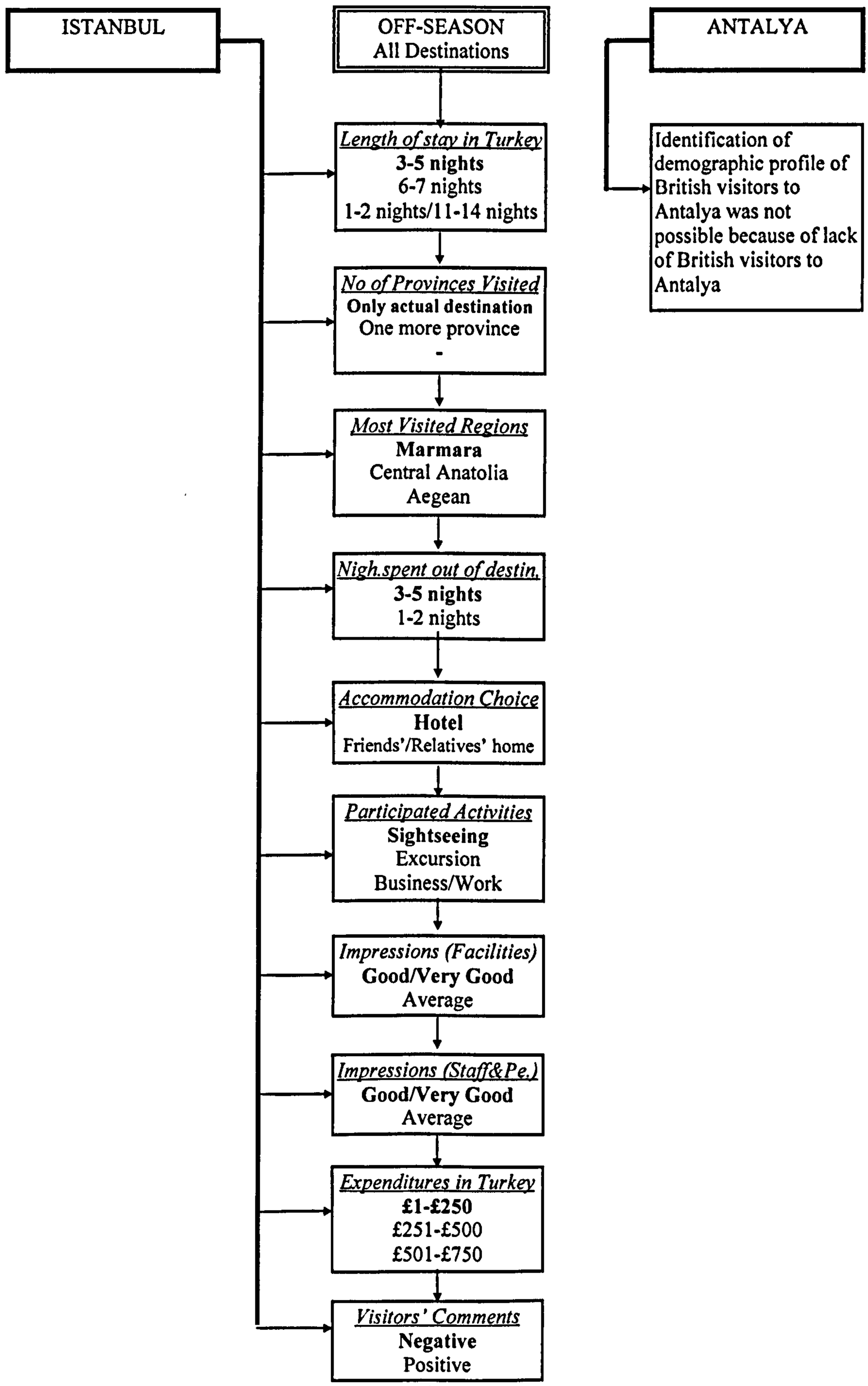
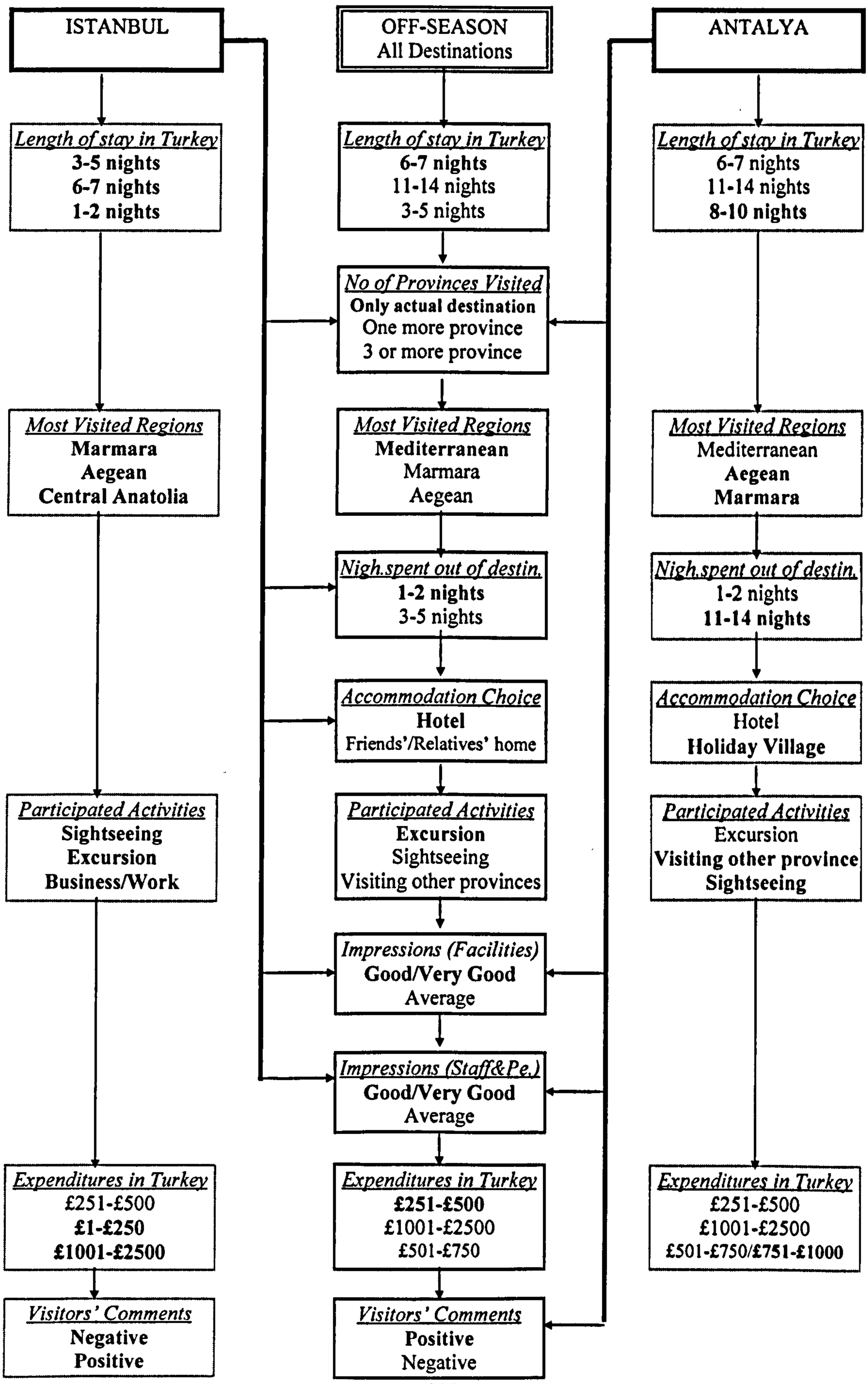


Figure 4.34 Preferential characteristics of German visitors by destination

(See also Appendix 112, 113, 114)



4.6. Past visit characteristics of repeat visitors

Repeat visitors

While around 45% of British and German visitors are repeat visitors, the remaining 55% of visitors visited Turkey for the first time (Table 4.171). Distribution of repeat and first time visitors indicated only small differences visitors between shoulders (Table 4.172), but they indicated large differences between destinations (Table 4.173). Although overall and German repeat and first time visitors did not show significant differences, some differences were observed in the proportion of British visitors in the first and second shoulders. While the share of first time British visitors was higher in the first shoulder compared with the second shoulder visitors, in contrast, the proportion of repeat visitors in the second shoulder was more than first shoulder visitors. On the other hand, there was a 17% difference between repeat and first time visitors in the first shoulder, this difference narrowed down to only 2% in the second shoulder. In other words, first time visitors preferred visiting Turkey in the first shoulder, and repeat and first time visitors levelled in the second shoulder (Table 4.172).

Table 4.171 Visited Turkey before by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
Yes	103	46.6	341	43.6	444	44.3
No	118	53.4	441	56.4	559	55.7
Total	221	100	782	100	1003	100
	N 1003 p= 0.42785 >0.05 Missing:75					

The difference between the share of repeat visitors and first time visitors was smaller in Istanbul. However, the difference was much wider among visitors to Antalya (Table 4.173). While the difference between repeat and first time overall visitors in Istanbul was only 1 %, it was 20% in Antalya. This shows that first time visitors were in majority in Antalya and Istanbul was more attractive for repeat visitors. However, it must not be forgotten that business purpose of visit occupies an important place in Istanbul and most business people are more likely to visit same destination second time or more.

Table 4.172 Have you been to Turkey before? and shoulder season by nationality

	British				German				Total			
	1st shoulder		2nd shoulder		1st shoulder		2nd shoulder		1st shoulder		2nd shoulder	
	N	%	N	%	N	%	N	%	N	%	N	%
Yes	43	41.7	60	50.8	183	43.9	158	43.3	226	43.5	218	45.1
No	60	58.3	58	49.2	234	56.1	207	56.7	294	56.5	265	54.9
Total	103	100	118	100	417	100	365	100	520	100	483	100
	N 221 p=0.17612 >0.05				N 782 p=0.86657 >0.05				N 1003 p=0.59403 >0.05			

German visitors indicated almost same results with overall visitors. While repeat German visitors higher in Istanbul, first time German visitors were overwhelmingly in majority in Antalya. British and German visitors indicated contrast results in Istanbul. While first time visitors were dominant among British visitors to Istanbul, repeat visitors were in majority among German visitors to Istanbul. In short, while majority of British visitors were first time visitors and German visitors were repeat visitors in Istanbul, most German visitors to Antalya were first time visitors.

Table 4.173 Have you been to Turkey before? and place of visit (survey place) by nationality

	British				German				Total			
	Istanbul		Antalya		Istanbul		Antalya		Istanbul		Antalya	
	N	%	N	%	N	%	N	%	N	%	N	%
Yes	102	46.6	1	50.0	118	52.0	223	40.2	220	49.3	224	40.2
No	117	53.4	1	50.0	109	48.0	332	59.8	226	50.7	333	59.8
Total	219	100	2	100	227	100	555	100	446	100	557	100
	N 221 p=0.92301 >0.05				N 782 p=0.00252< 0.05				N 1003 p=0.00389< 0.05			

Year and month of last visit to Turkey

Almost same proportion of British and German repeat visitors visited Turkey in 1990 and before. The share of German repeat visitors in total was higher than British visitors between 1991 and 1994. However, the share of British repeat visitors who visited Turkey in the same year in 1995 was significantly higher than German visitors. While most German visitors generally visited Turkey in one year to four years after their last visit, significant number of British visitors visited Turkey one or two years after their last visit (Table 4.174).

Table 4.174 Year of last visit to Turkey by nationality, shoulder season and survey place

	Nationality				Shoulder				Survey Place			
	British		German		1st shoulder		2nd shoulder		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
1980 & before	1	1.0	15	4.5	7	3.2	9	4.2	7	3.3	9	4.1
1981-1985	7	7.2	12	3.6	5	2.3	14	6.6	10	4.7	9	4.1
1986-1990	13	13.4	46	13.9	26	12.0	33	15.5	23	10.8	36	16.6
1991-1993	11	11.3	90	27.1	62	28.7	39	18.3	31	14.6	70	32.3
1994	27	27.8	101	30.4	91	42.1	37	17.4	67	31.6	61	28.1
1995	38	39.2	68	20.5	25	11.6	81	38.0	74	34.9	32	14.7
Total	97	100	332	100	216	100	213	100	212	100	217	100
	N 97		N 332		N 216		N 213		N 212		N 217	
	N 429 p=NA n 429				N 213 p=NA n 429				N 429 p=NA n 429			
	N No of cases (visitors) n No of responses											

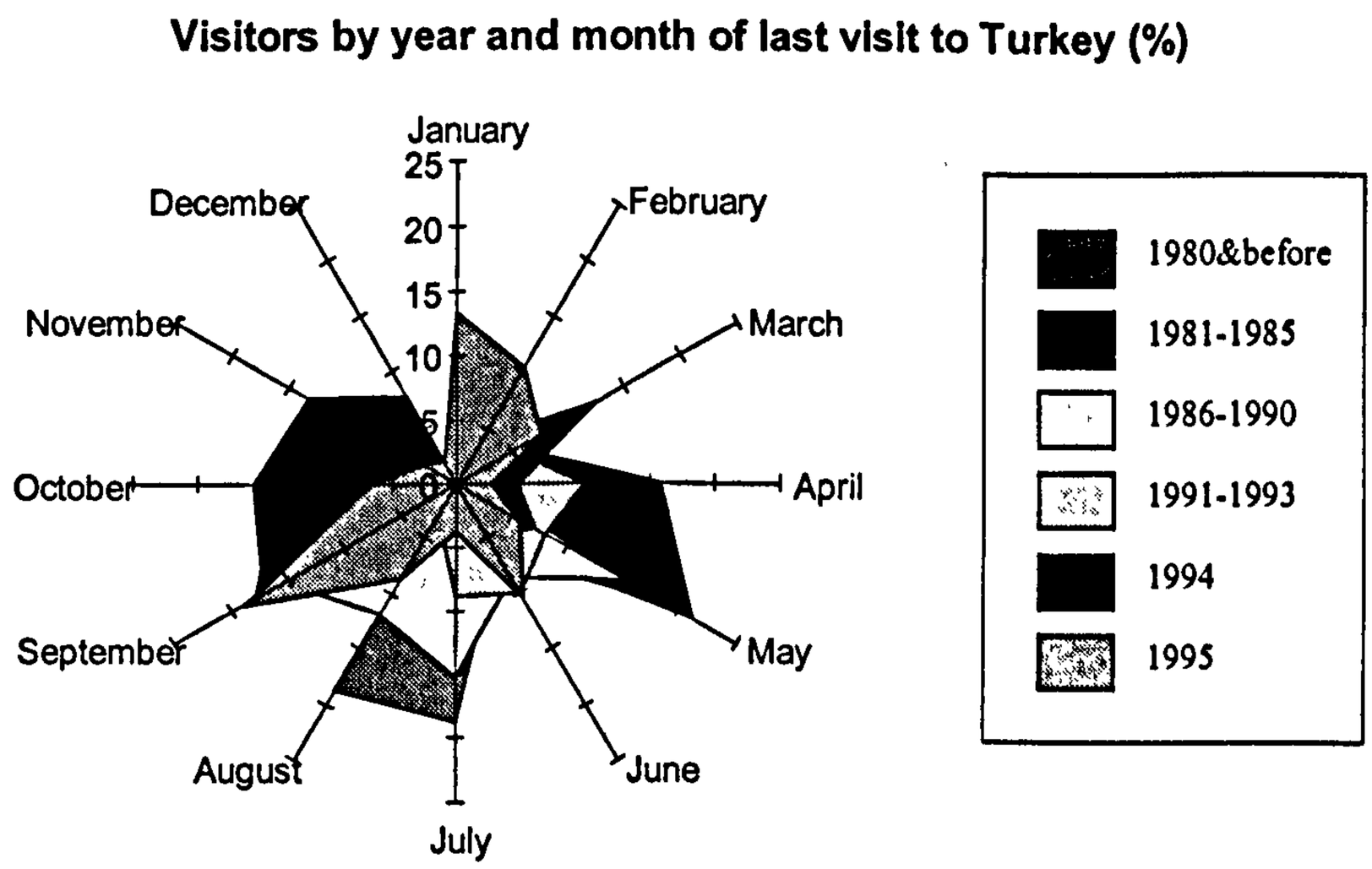
First and second shoulder visitors and visitors to Antalya and Istanbul indicated similar differences in the time of their last visit to Turkey. While around 82% of first shoulder visitors and visitors to Istanbul visited Turkey sometime between 1991 and 1995, it was around 75% for second shoulder visitors and visitors to Antalya in the same period. Simply, visitors in Istanbul and first shoulder visitors visited Turkey in time much closer to present visit than visitors in Antalya and second shoulder visitors.

On the other hand, Table 4.175 and Figure 4.35 show the monthly distribution of repeat visitors' previous visit in years. As seen, while previous visits concentrated fewer months especially in1990 and before, visits were realised in all months of year. As Figure 4.35 indicates clearly, there has been improvement in the number of visitors who visited Turkey out of peak season in the recent years. While the time of visit concentrated in the peak season months of July and August in 1980 and before, the time of visits shifted from peak season months towards March, October, November and December in 1994. October, November and December left its place to January and February in 1995.

Table 4.175 Distribution of visitors by month and year in past years

	Visitor numbers by year and month in past years											
	1980&before		1981-1985		1986-1990		1991-1993		1994		1995	
	n	%	n	%	n	%	n	%	n	%	n	%
January	-	-	-	-	-	-	4	4.0	-	-	14	13.2
February	1	6.3	-	-	-	-	5	5.0	5	3.9	11	10.4
March	-	-	1	5.3	1	1.7	5	5.0	16	12.5	8	7.5
April	1	6.3	3	15.8	1	1.7	10	9.9	6	4.7	3	2.8
May	3	18.8	4	21.1	9	15.3	8	7.9	9	7.0	6	5.7
June	1	6.3	1	5.3	5	8.5	10	9.9	6	4.7	11	10.4
July	3	18.8	2	10.5	9	15.3	9	8.9	4	3.1	4	3.8
August	3	18.8	1	5.3	7	11.9	3	3.0	10	7.8	9	8.5
September	-	-	2	10.5	9	15.3	18	17.8	22	17.2	20	18.9
October	1	6.3	-	-	5	8.5	14	13.9	20	15.6	7	6.6
November	-	-	1	5.3	1	1.7	7	6.9	17	13.3	3	2.8
December	1	6.3	-	-	2	3.4	1	1.0	10	7.8	2	1.9
Unknown	2	12.5	4	21.1	10	16.9	7	6.9	3	2.3	8	7.5
Total	16	100	19	100	59	100	101	100	128	100	106	100

Figure 4.35 Visitors by year and month of last visit to Turkey (%)



Consequently, one can say that significant proportion of current repeat shoulder visitors' previous visits particularly in the recent years were also realised in either shoulder season or off-season. Therefore, shoulder and off-season visitors can be more likely to visit Turkey in shoulder or off-season in their next visit as well.

Length and purpose of last visit, and influential factors on timing of last visit

It has been understood from the Table 4.176, most British and German visitors spent 6-14 nights in Turkey. However, the proportion of German visitors who spent longer time in Turkey during their last visit was quite higher than British visitors. In particular, the share of German visitors who spent between 8-28 nights was significantly more than British visitors' share in total. Therefore, while British visitors preferred short-breaks and shorter stays for possibly business visits, German visitors generally preferred longer so-jour holiday stays in Turkey and Table 4.177 also confirms this statement. Because as high as 72% of German repeat visitors visited Turkey for holiday/vacation purposes, they stayed longer in Turkey as expected from holiday-makers. In contrast, since business was an important purpose of visit for British visitors who usually stay shorter, British visitor' length of stay was shorter compared to German visitors.

Table 4.176 Length of last stay by nationality

	British		German		Total	
	N	%	*N*	%	*N*	%
1-2 nights	8	8.7	8	2.5	16	3.9
3-5 nights	12	13.0	31	9.7	43	10.4
6-7 nights	28	30.4	71	22.2	99	24.0
8-14 nights	27	29.3	134	41.9	161	39.1
15-21 nights	4	4.3	45	14.1	49	11.9
22-28 nights	4	4.3	16	5.0	20	4.9
Over 28 nights	9	9.8	15	4.7	24	5.8
Total	92	100	320	100	412	100
	N 412 p= 0.00140< 0.05 Missing:666					

Table 4.177 Last visit's purpose of visit by nationality-by-nationality, shoulder season and survey place

	Nationality				Shoulder				Survey Place			
	British		German		1st shoulder		2nd shoulder		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
Holiday/Vacat	36	36.7	226	72.0	125	61.9	137	65.2	87	42.2	175	85.0
Cultural	1	1.0	16	5.1	11	5.4	6	2.9	7	3.4	10	4.9
Business	37	37.8	36	11.5	38	18.8	35	16.7	68	33.0	5	2.4
Vis.Friend&R	11	11.2	15	4.8	10	5.0	16	7.6	18	8.7	8	3.9
None of Above	13	13.3	21	6.7	18	8.9	16	7.6	26	12.6	8	3.9
Total	98	100	314	100	202	100	210	100	206	100	206	100
	N 96		N 308		N 200		N 204		N 201		N 203	
	N 404 p=0.000 n 412				N 404 p=0.359 n 412				N 404 p=0.000 n 412			
	N No of cases (visitors) n No of responses											

No significant differences were observed in the first and second shoulder visitors' purpose of previous visit. Holiday and business were important purposes of visit in both shoulders. However, there were significant differences between visitors' purpose of visit in Istanbul and Antalya. While 85% of visitors to Antalya stated that they visited Turkey for holiday/vacation purposes in their previous visit, it was only 42% for visitors in Istanbul, but in addition to holiday purpose, business also was also important purpose for visitors to Istanbul.

Table 4.178 Influential factors on last visit by nationality

	Nationality				Shoulder				Survey Place			
	British		German		1st shoulder		2nd shoulder		Istanbul		Antalya	
	n	%	n	%	n	%	n	%	n	%	n	%
Weather	18	16.7	112	28.9	66	26.1	64	26.4	43	18.1	87	33.7
My/My Partner's job	14	13.0	23	5.9	20	7.9	17	7.0	30	12.7	7	2.7
School Holidays	5	4.6	18	4.7	10	4.0	13	5.4	6	2.5	17	6.6
Considered This time	3	2.8	74	19.1	46	18.2	31	12.8	26	11.0	51	19.8
Prefer This Time	10	9.3	41	10.6	30	11.9	21	8.7	21	8.9	30	11.6
Business	34	31.5	29	7.5	29	11.5	34	14.0	61	25.7	2	0.8
AttractiveOffer	-	-	7	1.8	2	0.8	5	2.1	-	-	7	2.7
Cost	-	-	3	0.8	1	0.4	2	0.8	-	-	3	1.2
Friends & Relatives	6	5.6	9	2.3	7	2.8	8	3.3	11	4.6	4	1.6
Nothing Particular	12	11.1	62	16.0	36	14.2	38	15.7	27	11.4	47	18.2
None of Above	6	5.6	9	2.3	6	2.4	9	3.7	12	5.1	3	1.2
Total	108	100	387	100	253	100	242	100	237	100	258	100
	N 96		N 311		N 204		N 203		N 202		N 205	
	N 407 p=0.000 n 495				N 407 p=0.617 n 495				N 407 p=0.000 n 495			
	N No of cases (visitors) n No of responses											

Although no large differences were recorded between influential factors in the first and second shoulders, very big differences were identified in influential factors which influenced British and German visitors' and visitors' time of previous visit to Istanbul and Antalya (Table 4.178). Weather kept its place as an important influential factor for German visitors, first and second shoulder visitors and visitors to Antalya. Instead of weather conditions, timing of business in Turkey was primary influential factor for British visitors and visitors to Istanbul. The cost of travel and attractive travel offer was not as significant as expected. On the other hand, own or partner' job, consideration of this time only, preference of the particular season and children's school was other important factors. It is very unexpected that between 11% and 18% of visitors stated that no particular factor influenced timing of their last visit to Turkey.

To sum up, depending on the purpose of visit, influential factors indicated differences and while weather, consideration only and preference of particular shoulder were important for German and visitors to Antalya who were also German, business, weather, own or partner's job, consideration only and preference of particular shoulder were important for British and visitors to Istanbul. Weather, own or partner's job, consideration only and preference of particular shoulder and business were identified as significant influential factors in both shoulders. (Figure 4.36, 4.37, 4.37, 4.39, 4.40, 4.41 and Appendix 115, 116 and 117).

Figure 4.36 Overall visitors' past visit characteristics by shoulder (*See Appendix 115, 116, 117*)

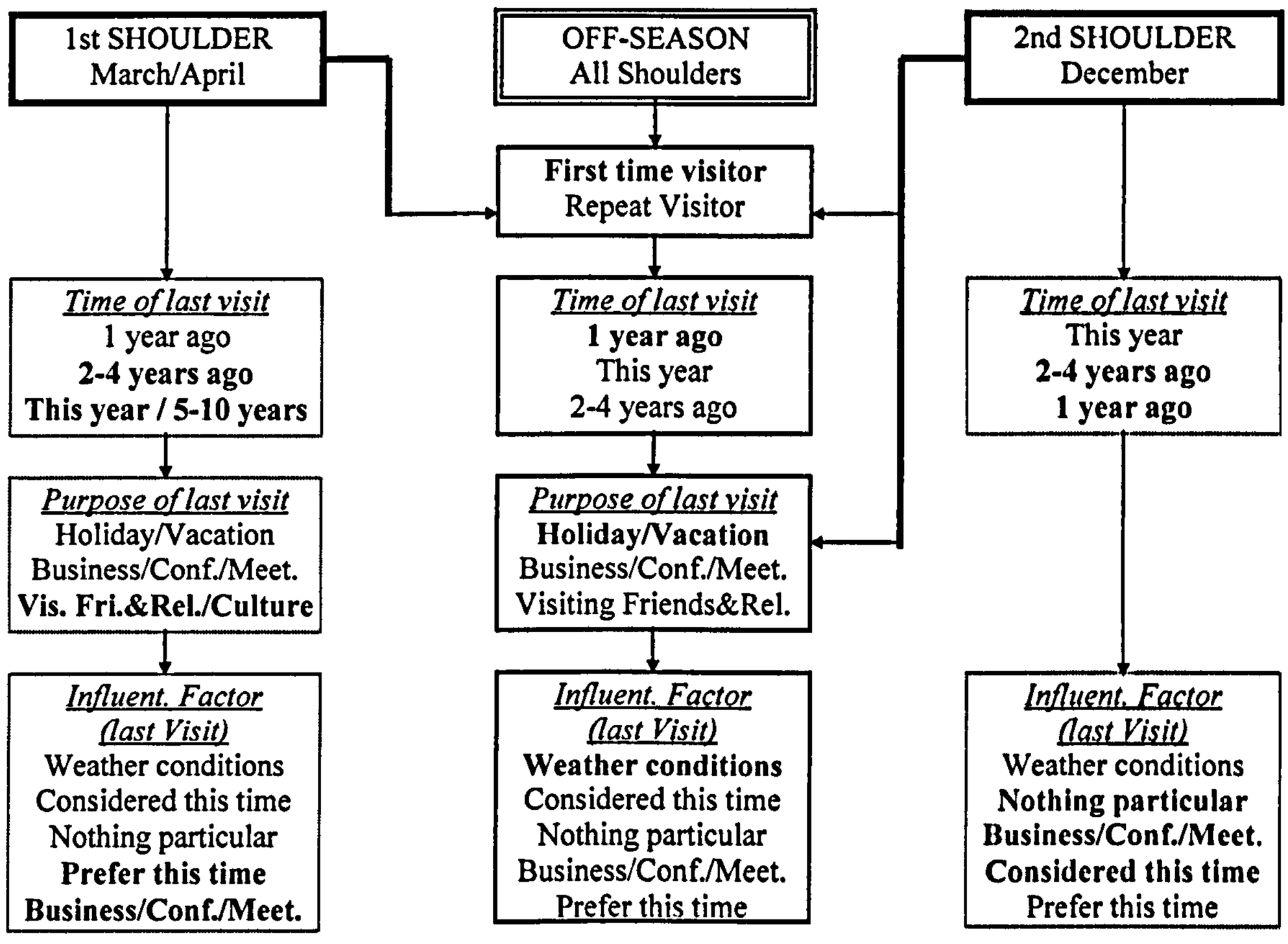


Figure 4.37 Overall visitors' past visit characteristics by destination (*See Appendix 115, 116, 117*)

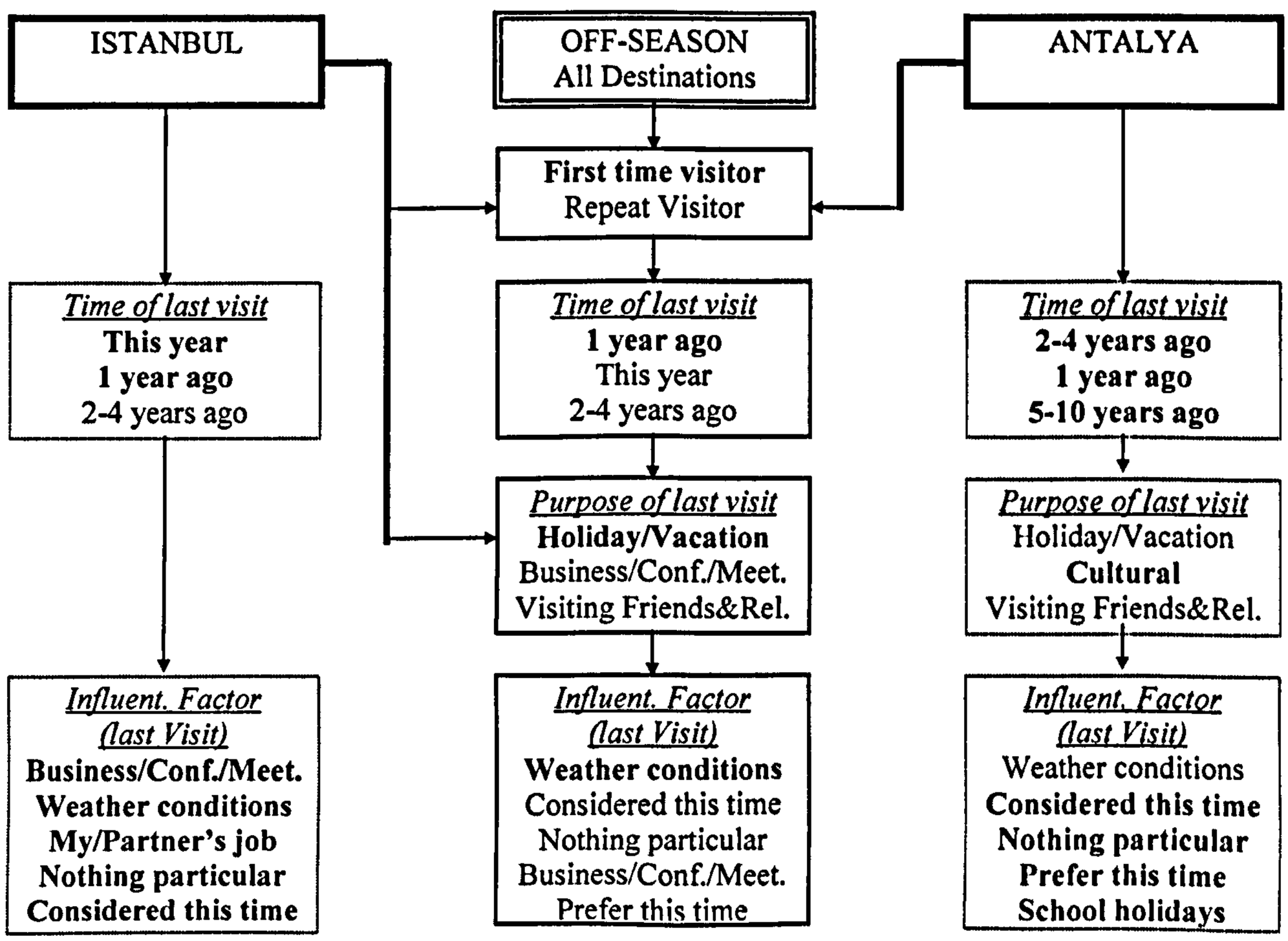


Figure 4.38 British visitors' past visit characteristics by shoulder (*See Appendix 115, 116, 117*)

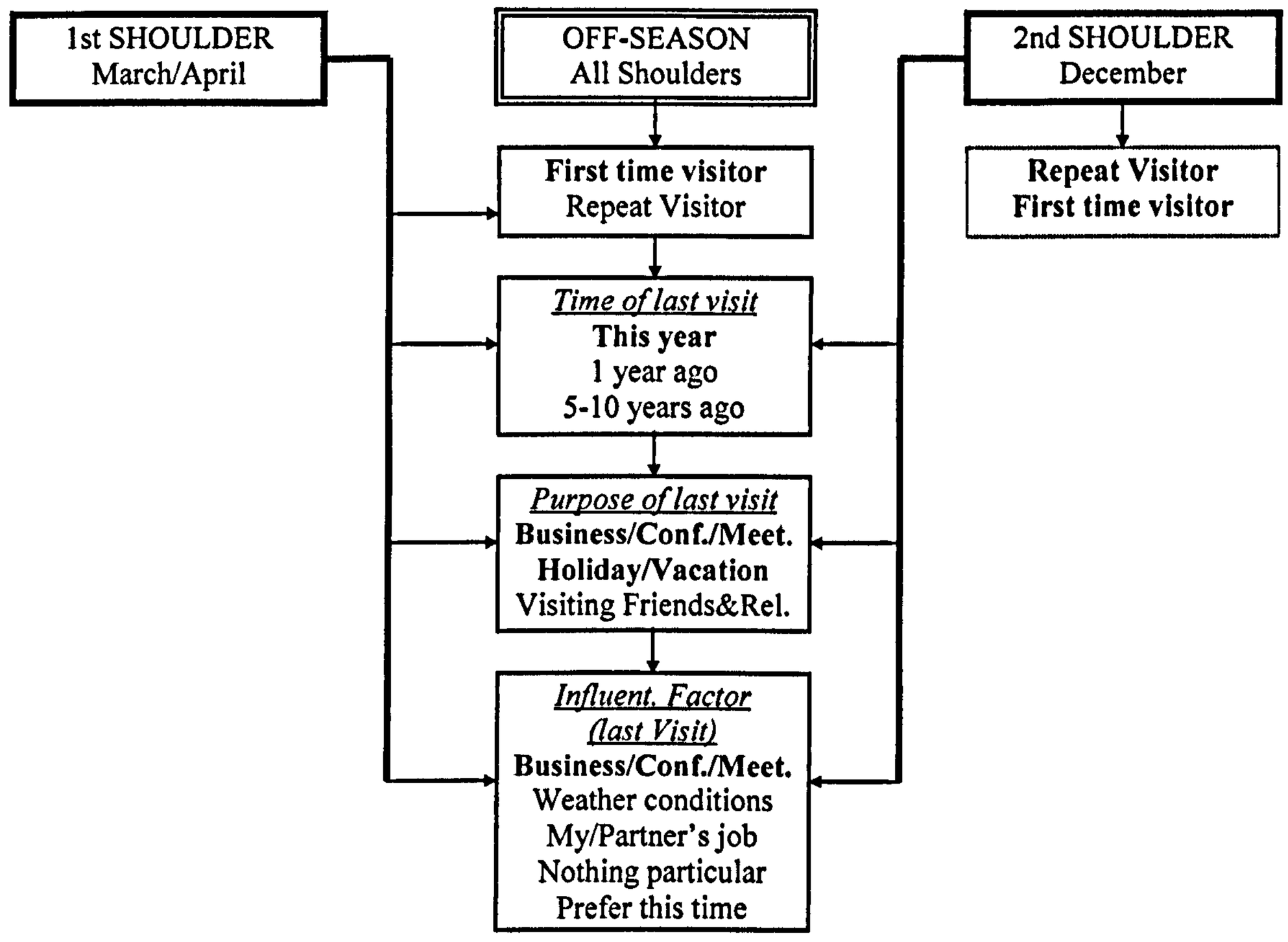


Figure 4.39 German visitors' past visit characteristics by shoulder (*See Appendix 115, 116, 117*)

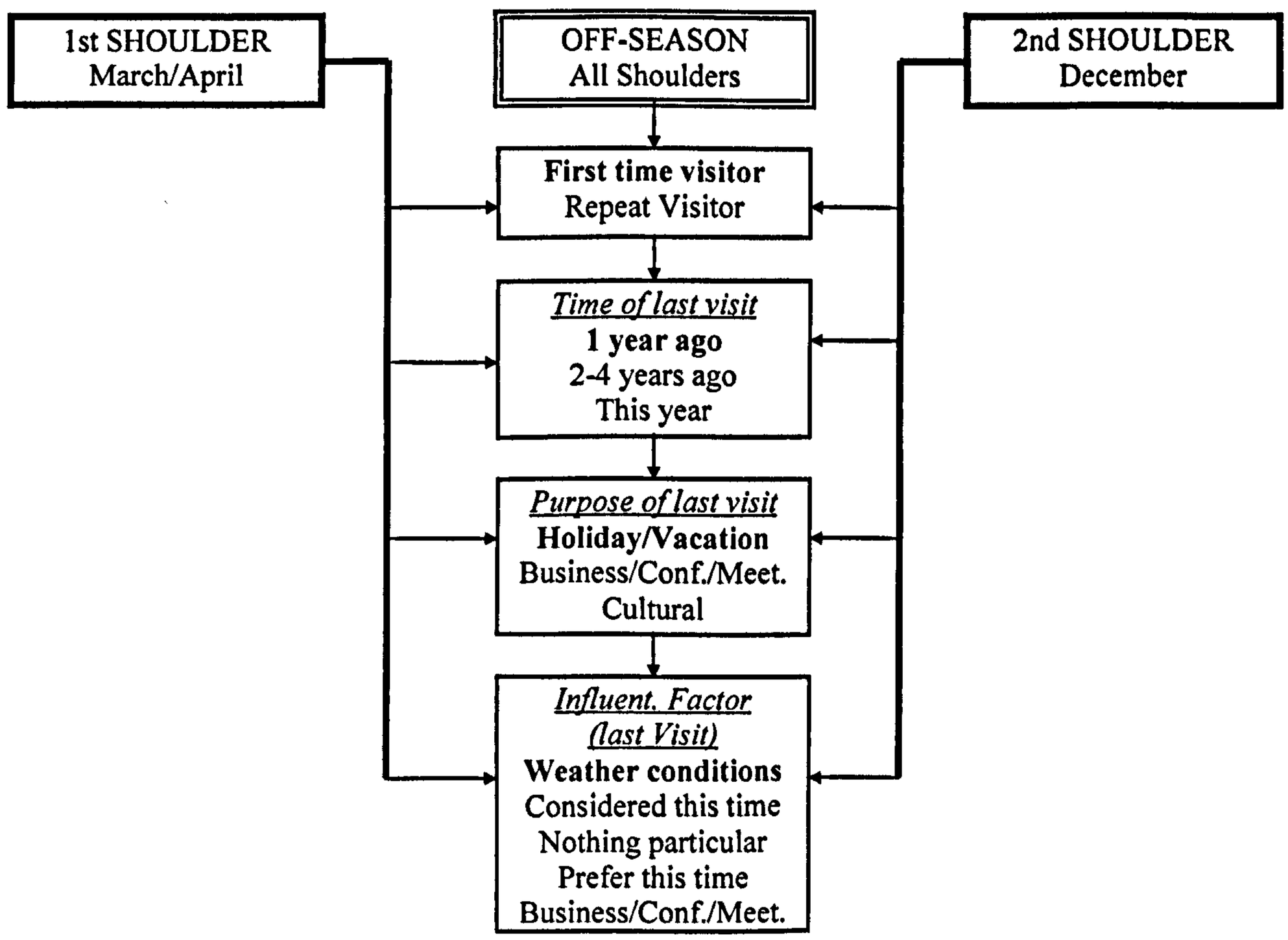


Figure 4.40 British visitors' past visit characteristics by destination (*See Appendix 115, 116, 117*)

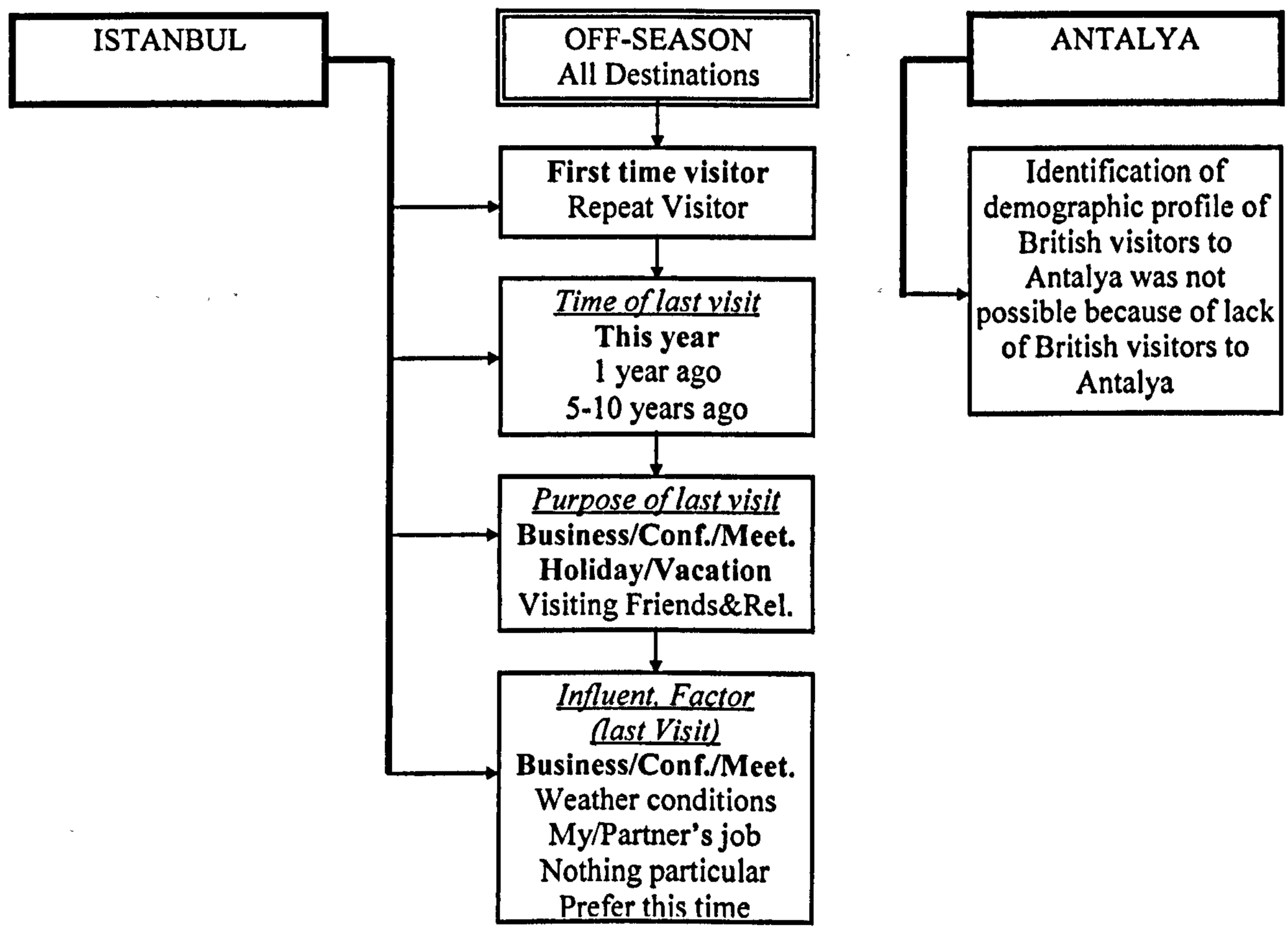
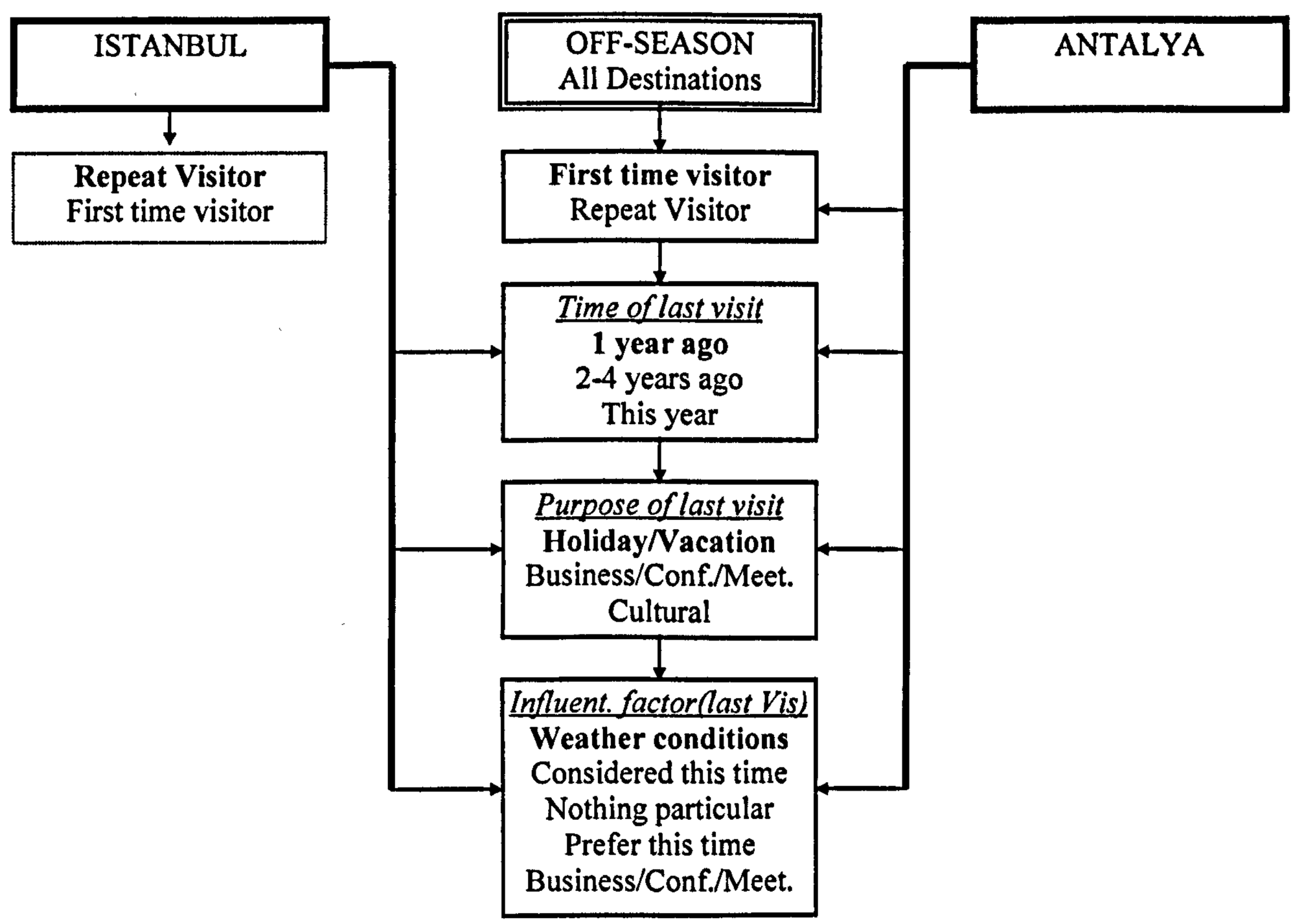


Figure 4.41 German visitors' past visit characteristics by destination (*See Appendix 115, 116, 117*)



Chapter 5

Discussions

5.1. Effects of temporal and spatial disparity in Turkey

The Marmara, Aegean and Mediterranean regions, including Istanbul, Antalya and Mugla which are the most popular destinations in Turkey, have already felt the positive economic impacts of tourism since the middle of 1980s. As a result of substantial tourism development, infrastructural, i.e. transport, water, sewerage, health services as well as superstructure investments such as hotels, restaurants, entertainment facilities and public services have emerged rapidly in popular tourism regions.

Various businesses in construction, housing, retailing, service and other commercial industries benefit from the growing demand for their products and services, and expand their businesses. In parallel to the development of tourism in these southern and western regions 'direct, indirect, induced and construction employment' (WTO 1994), opportunities have increased. Besides the local people, many other skilled, semi- or non-skilled workers from other regions are increasingly needed and employed in the tourism and related industries, especially in the peak season. Seasonal and permanent workers, sometimes with their families, have temporarily or permanently migrated into these regions, either because they have found jobs or with the hope that they will find jobs there. The direct tourism employment in licensed accommodation establishments, food and beverage sector, transportation companies and travel agencies increased from 647000 in 1993 to 1200000 in 2003 indicating a 54% increase in only ten years period. It has been estimated that indirect employment in the tourism industry is approximately 1.5 times over the direct employment. In this respect, the industry in Turkey provides 1800000 indirect jobs and the overall employment reached to 3000000 in 2003 (TURSAB, 2004). Faster regional growth, attracting more investments or the expansion of existing businesses, increasing employment opportunities and disposable income have helped improved living standards in the popular or favourable tourism regions.

Tourism has also helped host and guest communities to exchange their cultural values, learn, understand each others daily life style and behaviour and overcome prejudices. Although there has been some cultural distortion caused by tourists, i.e. imitation of foreign culture and behaviour by locals, and entrance of foreign way of life into the lives of residents of receiving destination, in particular in places where mass-tourism exists, curiosity and demand from foreigners have revitalised and led to preservation of some Turkish cultural values such as folk dances, traditional clothes, traditional special occasion ceremonies and historical buildings which many of them tend to be forgotten.

However, domestic migration towards more developed regions and especially to popular tourism resorts has generated social and economic problems for local people and social and cultural troubles for immigrants and their families in their home town. For example, the workforce from outside has caused a degree of unemployment and unrest among the local people as jobs vacancies are partly filled by others. In addition, divided family life between home and the employment region has resulted in adaptation difficulties to a different environment cause problems as well, especially among the un-educated or less-educated people.

On the other hand, under-developed regions have not benefited from above positive economic impacts of tourism as much as other regions, although there is a limited flow of wages from employees to their families in these regions. Potential and existing natural and man-made tourism attractions have been under-utilised. As a result of under-investment and a stagnant economy in these regions, unemployment is wide-spread and migration to other regions is causing many difficulties and conflicts such as divided families, social and cultural conflict and crime.

According to official 1985 and 1990 and 2000 population census statistics, the highest population growth (51.9% in 2000) was recorded in Antalya, which is the most popular resort province in Turkey. Istanbul where around ten million people live also scored 39.2% increase in its population. In the same period, total Turkish population grew by 20.1%, Coastal province population by 23.5% and the inner province population growth by only 16.8%. Apart from very localised high population growth in some large eastern and south-eastern provinces as a result of some government policies, which encourage local people who live in the inaccessible countryside in an emergency to migrate and live in organised locations for security reasons, many provinces in inner regions of Anatolia and on the Black Sea coasts recorded below average or sub-zero population growth reaching minus 35.6% in Tunceli province in Eastern Anatolia (D.I.E. 2003).

Despite mainly economic related disadvantages, less-developed tourism regions have been able to preserve their unique unspoilt natural, man-made and cultural values which could be the sound base for potential tourism development with cautious policies, strategies and plans. The majority of these regions posses a more diverse tourism product than the popular coastal regions dependent on sea, sun and sand. More than 1300 spa springs, numerous mountains, high plateaux 'yaylas', rivers and lakes as well as archaeological, historical, cultural and many other unspoilt natural and man-made attractions are located in the interior regions and scattered evenly across the country. These regions have not experienced any adverse environmental impacts, overcrowding, high prices in peak season and negative social and cultural influence which many popular regions have already been affected by.

5.2. Temporally and spatially balanced tourism product development

It is the aim of almost all governments that developing tourism will contribute to the national economy and the national interests. However, this aim can only come into existence when the resources are used and marketed in a rational way. As most developing countries often experience, things do not go as planned or expected and problems emerge and may exceed benefits. Therefore, balance must be the key in seasonal and spatial tourism product distribution.

Olali (1968) developed nine different formulas to show the possibility of tourism development in some regions of Turkey. The main factors considered by Olali were as follow:

1- Main Tourism Resources
(K= Rich Tourism Resources) (k= poor tourism resources)
2- Super- and Infra- Structures
(D= Adequate Infra-Superstructure) (d= Inadequate infra-and superstructure)
3- Psychological Resources
(Residents attitudes, culture, attitudes of local officials towards tourism development)
(P= Positive good psychological behaviour), (p= negative psychological attitudes)
4- Demand for Tourism
(T= adequate demand), (t= inadequate or no demand)
G= Development, f= function

By using these factors Olali outlined nine different development alternatives for the regions:

1- G = f (k, d, p, t)
There is no tourism development and no adequate resources available for the future development in the region
2- G = f (K, D, P, T)
There is a very adequate development in region, and development will continue in the future
3- G = f (K, D, P, t)
There is a limited development in the region and inadequate use of resources as a result of lower demand
4- G = f (K, d, p, t)
There is adequate tourism resources attraction factors but inadequate infra-and superstructure, lower demand and negative attitudes tourism development make the region less developed
5- G = f (k, d, p, T) An impossible development in theory.
6- G = f (K, d, p, T) There is an imbalance in the region and lack of infra- and super- structure
7- G = f (k, D, p, T) It expresses the temporary development
8- G = f (K, D, p, t) and
9- G = f (k, D, p, t)
There is excessive investment on infra and superstructure, lack of demand cause underutilization of resources and lower profit margins in near future. Formula 9 particularly indicates, unplanned and uncalculated investments.

The following formula can be added to above formulas:

G = f (K, d, P, t): Rich tourism resources and positive resident attitude is available in the region but infra- and superstructure and the demand for tourism or tourism earnings are quite lower in the region. The development of tourism in these regions depend on the investment on infra- and superstructure and adequate marketing and promotion activities.

When these formulas adapted to regions of Turkey, the general outlook can be expressed as follows:

Region	For Coastal Regions	For Inner Regions
Marmara	G= f (K, D, P, T)	G= f (K, d, P, t)
Aegean	G= f (K, D, P, T)	G= f (K, d, P, t)
Mediterranean	G= f (K, D, P, T)	G= f (K, d, P, t)
Black Sea	G= f (K, d, P, t)	G= f (K, d, P, t)
Central Anatolia	---	G= f (K, d, P, t)
East Anatolia	---	G= f (K, d, P, t)
S.E. Anatolia	---	G= f (K, d, P, t)

While coastal regions, apart from Black Sea coast, indicates rich resources and advance development, inner regions indicate very low development in tourism as a result of inadequate infra- and super-structure, lack of product diversification, marketing and promotion activities.

There are many growth and product development and marketing options available for new, developing and developed tourism destinations which can be followed according to the aims of national and regional tourism development policies. Ansoff's (1965) 2 by 2 present and new product / present and new market expansion grid has provided a useful aid in examining, deciding and producing various growth possibilities. Four different strategy opportunities arise from this matrix for the development and management of tourism products:

1- ***Market penetration strategy*** which targets more market share with current products
2- ***Market development strategy*** which targets to find new markets for current products
3- ***Product development strategy*** which targets developing new products to current markets
4- ***Product and market diversification strategy*** which aims to develop and offer new products to new markets

The fundamental idea of this matrix could be applied to the development of spatially and seasonally balanced tourism which provides various benefits to the regional economy as well as the overall national economy. Figure 5.1 identifies four basic options in seasonal and spatial tourism development available for the tourism decision- and policy-makers. The options include:

1- Development of year-round tourism products in less- or un-developed regions (which aims to balance the tourism development and benefits distribution)
2- Development of year-round tourism products in developed regions (which aims to utilise available tourism resources, infra- and superstructure and facilities)

Policy-makers should decide which option is primarily suitable and come first to achieve the objectives set before. Then they should decide on the last two less desirable option as follows.

3- Development of seasonal tourism products in less- or undeveloped regions (which aims to balance the regional tourism development and benefits distribution, it spreads tourism throughout the country but cause expansion of seasonality)

4- Development of seasonal tourism products in developed regions (which aims to create new peak seasons and seasonal products development or to continue to benefit from current tourism in the region, deteriorates seasonality)

The following options are available for the tourism planners (Figure 5.2):

1- Development of **year-round** tourism products in **less- or undeveloped** regions to market them in **new markets**

2- Development of **year-round** tourism products in **less- or undeveloped** regions to market them in **existing markets**

3- Development of **year-round** tourism products in currently **developed** regions to market them in **new markets**

4- Development of **year-round** tourism products in currently **developed** regions to market them in **existing markets**

5- Development of **seasonal** tourism products in **less- or undeveloped** regions to market them in **new markets**

6- Development of **seasonal** tourism products in **less- or undeveloped** regions to market them in **existing markets**

7- Development of **seasonal** tourism products in currently **developed** regions to market them in **new markets**

8- Development of **seasonal** tourism products in currently **developed** regions to market them in **existing markets**

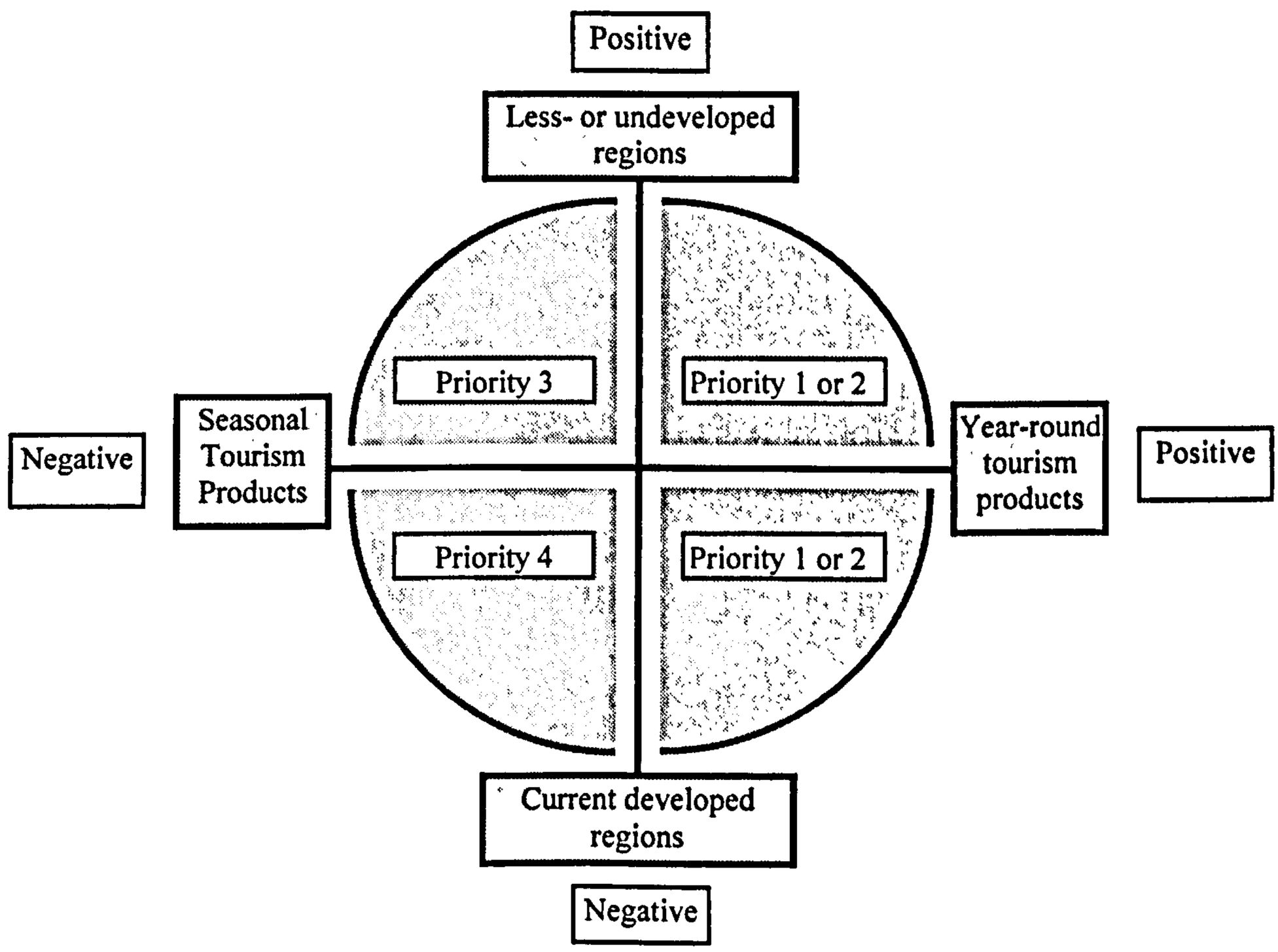
9- Development of **year-round and seasonal** tourism products altogether in **all region** to market them in **new markets**

10- Development of **year-round and seasonal** tourism products altogether in **all regions** to market them in **existing markets**

11- Development of **year-round and seasonal** tourism products altogether in **all regions** to market them in **all new and existing markets**

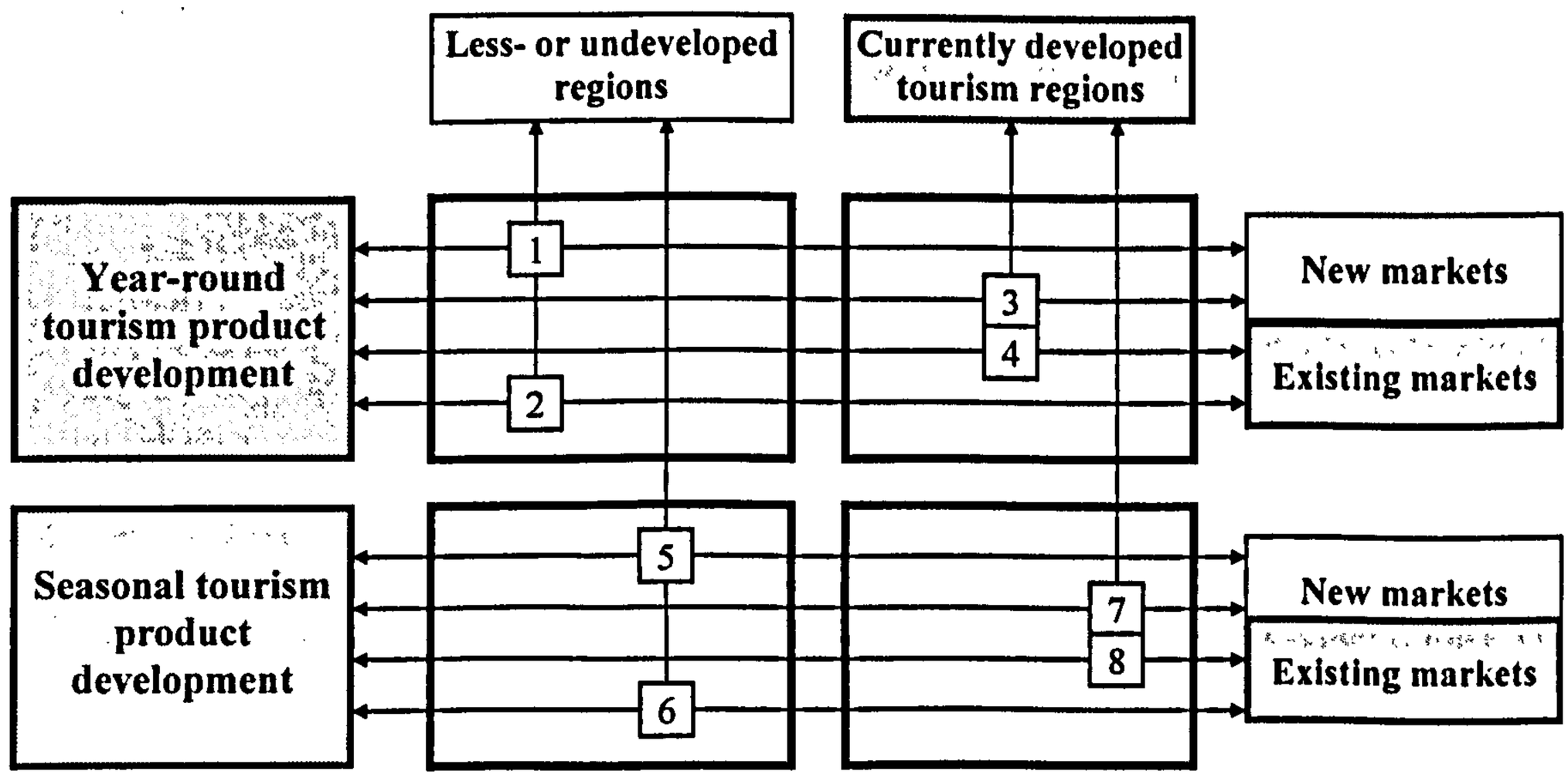
12- **No Change** in the present development and marketing situation

Figure 5.1 Regional Tourism Development Priorities According to Its Impacts



A more complicated regional development and marketing options could be outlined as follows:

Figure 5.2 Spatial and Seasonal Tourism Development / Marketing Matrix



These options most of which target market penetration, product development, market development and market and product diversification can help in;

- Developing all year-round tourism
- Prolongation of the main season
- Creation of secondary peak season or seasons
- Spreading tourism and its benefits throughout the country
- Better utilisation of resources and facilities
- Protection of natural and man-made resources
- Contribution to and improvement of living standards of the community

5.3. Evaluation and identification of existing and potential products

The basic features which should carefully be evaluated for any location where tourism is to be developed can be outlined as follow: (adapted from the Turkish Ministry of Culture and Tourism, 1988)

a- *Location*:
*In country / In region / In province

b- *Physical Characteristics*:
*Climate : No of sunny/snowy/rainy days, snow thickness, air temperature
*Topographical and morphological structure
*Flora : Forests/Thicket/Fields and gardens/arid areas
*Fauna : Birds/Fishes/Others
*Geological Formations: Caves with special features/Volcanic formations/Hot springs/waterfalls
*Waters and coastal features:
Sea : Physical characteristics of coasts/water characteristics/water-ground characteristics / morphological characteristics of coasts
Lake : Natural lakes/artificial lakes
Coastal/water/water-ground characteristics/surface area (m2)
Rivers : Length/width/flow rates

c- *Infrastructure*:
*Technical infrastructure
Transportation : Distance to airports, highways, railways, ports and their quality
Communication : National/International
Water Resources : Underground waters/local water network
Sewage
Electricity
Gas
Waste Collection
*Social infrastructure
Education
Health services
Congress/convention halls: Capacity/technical equipments (audio-visual, translation, Cinema video-tv, multi-vision)/ communication facilities (telephone, fax, computer, internet, etc.)

d- *Cultural Values*:
*Historical resources: (mosques, hans, caravanserais, hamams, bridges, clock towers.)
*Archaeological resources: Overground / underground
Antique cities, castles, city walls, theatres, hamams (baths), aqueduct, necropolis, acropolis,

temples, churches, cisterns, man-made caves.
*Historical religious centres: Mosques, tombs, monasteries, churches.
*Museums: Ethnographical, archaeological, open air, special museums (underwater, money, glass, costumes, mosaic museums)
*Festivals, Special days: traditional, religious, etc.
*Local handcrafts: Carpets, rugs, ceramic, wooden, cooper crafts, jewellery, stone crafts.

e- *Economical Attractions*:
*Cheapness: Transportation, accommodation, food-beverage, shopping, entertainment, services.
*Variety: Souvenirs, cuisine, home furniture
*Specialities: Local handcrafts, foods, etc.

The location of place in the country

Each region in almost all countries carry some special features which are peculiar to those regions and can include characteristics of the natural resources and the people live in the region. For example, the Black Sea Region is know as the place one can experience the all tones of green colour and where the people are very active and lively. On the other hand, Eastern Anatolia is remembered as the place where winters are very cold and tough and there are numerous high plateaus and high mountains. Each of these characteristics can be utilized in developments of one or more tourism types in the regions.

The location of place in the region

The location of place in the region is also important during investment and operation periods for reasons outlined below;

- Transportation and accessibility
- Availability of services provided by municipalities and local government
- Provision of consumable products and services
- Distance to labour markets

The climate

The climate in the region indicates significance in development of different tourism types as the length of the season depends on mainly climatic conditions. The feasibility, productivity and profitability of the establishments are also affected by climate. For example, on area where the winter is long and the snow thickness is well enough for skiing can be the best place to develop winter tourism. The factors affected by the climatic conditions in an area are

- the type of tourism to be developed
- development and investment location
- profitability of investment made in the area
- the type of investment (accommodation, etc.)

- architecture of buildings
- micro-climatic characteristics, important for health tourism
- development of one or more tourism types in one or more seasons.

The topographic and morphological structure

While plains are important for the development of sites for activities such as golfing, cycling, car racing and airports, mountainous, rocky and inaccessible areas by motor vehicles indicates importance for activities such as trekking, horse riding, photo safari, hunting and four-wheel car trophies. Water sports such as rafting and canoeing can be developed in rivers.

The flora

The natural parks can attract tourists and scientists by being a subject for researches. On the other hand, visitors can experience the rural life while growing vegetables, picking up apples and strawberries. Farm tourism, village, high-plateau tourism can be developed and visitors may be healed by recipes of natural vegetation (health tourism). In this respect the following subjects should be evaluated carefully:

- an exact inventory of vegetation in the area
- vegetation mapping (detailed)
- identification of vegetation species peculiar to the area
- identification of vegetation which requires special protection programmes.
- identification of illnesses and type of vegetation cures these illnesses
- development of breeding programmes

The fauna

The bird watching, watching under-water animals, hunting and fishing, photo-safaris and scientific researches can make the area attractive for tourists.

- an exact detailed inventory of land and under-water animals, underground animals
- animal mapping
- identification of animal species peculiar to the area
- identification of animals should be protected
- development of breeding programmes
- developing centres for bird watching, animal watching and research

The caves with special features

The naturally formed caves which have stalactites, stalagmites, coloured stones, ponds, lakes and rivers, microclimatic atmosphere and the man-made caves carved in early centuries can be an important attraction factors of the region. The caves can be utilized for development of special interest tourism as well as health tourism.

- Inventory of all natural and man-made caves
- Accessibility arrangements
- Lightening arrangements
- Service areas and common places etc.

Geological and volcanic formations, mountains

These kinds of places can be prime attraction to scientists for scientific explorations, mountain climbers and skiers.

Waters and coastal features

The spas and spring waters have been used for long time for health purposes. After the detailed analysis of hot waters and mud, the tests should be carried out whether there is enough water resources or not for the development of spa tourism in the area.

Water Falls	: Photographing, picnicking, panoramic viewing
The Sea	: Water sports, fishing, swimming, bathing, health, scientific exploration
The Lakes	: Water sports, fishing, swimming, bathing, camping, scientific exploration
Rivers	: Water sports, fishing, canoeing, picnicking

Transport

Easy accessibility and transportation facilities give the area priority among others to be developed as a destination and in promotion and marketing activities. The development of transport infrastructure and its exploitation will not only be facilitate and stimulate recreation and tourism but uncoordinated growth could have negative effects. These would include excessive loading and disturbance of the natural environment which forms the resource base of recreation and tourism. Likewise, overdeveloped technical infrastructure could lead to very intensive urbanization and an overloading of environmental carrying-capacity which would detract from the quality expected of tourist centers. (United Nations 1988). Therefore, balanced and responsible infra-structure is essential.

Communication

It is important for the existence of tourism and the development of tourism in the area

Infra-structure : Water, sewage, electricity and waste collection

Education : An important social infrastructure factor in development of tourism

Provision of health services for visitors as well as locals.

Meeting, congress and convention halls

Development of these kinds of halls can trigger the demand for congress tourism which can be held in off-season period. As well as helping local people financially and to understand and follow national and international issues, congress tourism provides an exceptional opportunity to promote and market the region by entertaining intellectual people attending the congress. To develop congress tourism, adequate technological facilities should be available and a very sound coordination and cooperation should be established between the industry and universities and other organizations.

Historical sites and monuments:

These kinds of resources reflect usually the history, architectural characteristics and the way of living in the area for centuries. Mosques, churches, tombs, caravanserais and others can be an attraction factor for researchers, architects, art historians and students. In addition, the tourists generally tend to see and picture these kinds of places. They should be protected and restored if necessary. They can be used as museums, exhibition places. However, the most preferred way of using these resources is using them I a way they were used centuries ago.

Archaeological resources

Antique cities, castles, theatres, temples, cisterns and other have attracted millions of people for years. They should be conserved and restored if necessary. The strict measures should be taken to prevent smuggling and to promote them in national and international markets.

Historical religious sites : It is important for the development of religious (belief) tourism.

Museums : All kind of museums ranging from natural museums to scientific and art museums can be used to attract several visitor segments.

Festivals and special days and events attract several visitors.

Local handcrafts consolidate the unique travel experience.

Cheapness : It is an important factor for particularly people who have average or below average income. As visitor surveys indicated cheapness and cheaper last-minute flights attract considerably high number of visitors particularly to Antalya as sea-sun-sand oriented destination.

Variety in the area : Richness of location in terms of tourism resources and attractions.

Specialities peculiar to the place : The local cuisine, art, handcrafts, products, services

Identification, inventory and analysis of regional and provincial level existing and potential tourism resources provide an important basis for tourism planning and tourism development. All tourism resources, natural and man-made, should be identified and classified by their location, type and importance level in the development process so that sound tourism development policy and strategies can be adapted and put into practise stage by stage.

According to United Nations study (1988) spatial planning policy can include, among other elements, the following principles:

- Planning concepts should be developed.
- The urban environment should be appropriately adapted to the recreational and leisure needs of the local population as well as of visitors, for instance provision of residential facilities, parks, sports facilities, etc.
- Concentrated development should be limited to adequate zones instead of random, haphazard development everywhere.
- Fragile natural ecosystems should be preserved and protected from over-use.
- The development of tourism should respect reasonable barriers and observe the saturation capacity of landscapes in the natural and anthropogenesis environment.
- Tourism should be carefully allocated in existing settlements where it should be developed in unity and integrated with the life of the local population.
- Improved use should be made of the existing housing stock, available beds and service facilities for tourist accommodation.
- The indigenous population should be actively included in the development of tourism already at

the stage of decision-making as well as later in the implementation of decisions; it should gain economic, social and ecological advantages.

- Local traditions, folk-customs, architecture and the cultural and historical heritage should be protected and developed.
- Traditional agricultural activity in rural areas should be preserved and stimulated along with traditional occupations in harmony with tourist development.

Sound tourism policies depend on the serious and detailed analysis of national and international markets (Olali, 1968). As Tinbergen (1958) points out awareness of the possibilities of development is accomplished largely through statistics, research and information (Olali, 1968, Tinbergen, 1958)

The following steps should also be followed in the resource identification and location process:

1- Are there adequate resources for tourism in each region?
   - Inventory of existing and potential resources and amenities in each province
   - Seasonal vs. Year-round products

2- Which resources are to be developed and where are they located?
   - Tourism resource analysis
     * "Mapping for the identification of key resources
     * Measurement of various resource capacities
     * Resource classification" (Mill and Morrison, 1985)
     * Rating the products high, medium and low in terms of market growth rate and market share dominance.

3- Is there sufficient labour force in the area to support tourism without importing migrant workers?
   - Labour force and labour need assessment

4- Is infrastructure and superstructure needed?
   - Determination of financial requirements
   - Economic justification
   - Environmental impacts

5- Is the region easily accessible?
   - Public and private transport and infrastructure

6- What are the strengths, weaknesses, opportunities and threats in the development of tourism in the region.

5.4. The tourism resources can be utilised for improved temporal and spatial imbalance

Turkey has significant potential from the standpoint of tourism. As previously stated in Chapter 1, both the country's geographical position and its historical and natural assets make this very clear. Turkey is a country has a wide potential for investors in all industries all waiting to be exploited. Nevertheless, tourism is a new phenomenon in the country and is not being exploited to its full

potential, yet still preserves its heritage; the countries natural, historical resources and culture. These resources will be an advantage over rival countries in the near future.

As mentioned before in the first chapter, Turkey has certainly something for each tourist who has different ambitions, curiosities and tastes. Diversity of unspoilt natural assets, mountains, rivers, lakes, beaches, four main season and several climate types which change from region to region, historic heritages and ruins, cultural values, traditions, customs and traditional Turkish hospitality provide vast selection of attractions for tourists to chose. In summary, Turkey has an exceptional wealth of tourism assets and potential to be exploited in order to expand Turkish tourism and reduce the deficit in its national economy.

Congress tourism

Aymankuy (1997) identified six main problems in developing congress tourism in Turkey:

1. Superstructure problems: Small number of multipurpose congress centres, inadequate capacity of meeting halls and national convention bureaus.
2. Marketing and promotion problems
3. Affiliation problems to international organisations
4. Problems experienced in organising meetings and conventions
5. Organisational problems
6. Qualified staff problems

According to him, congresses are organised usually in spring and autumn and the most preferred months for international congresses are October (14.2%), May (14.1%), September (13%), June (12.4%) and November (10.8%) as the cost of the organisation significantly lower in these months and the quality of the services higher. Therefore, the congress tourism forms an opportunity which should not be missed out to utilize unused capacity in spring and autumn and to increase overall occupancy rates both in coastal areas and inner cities.

Congress tourism can be developed further by some incentive measures and for following reasons:

- to prevent concentration in time and space
- to prolong the season
- to increase occupancy rates and improve productivity and profitability
- to increase the average spending per visitor as the delegates and their companions spend three times more compared to ordinary visitors and 50% more compared to business visitors.
- to increase the overall tourism receipts and improve balance of payments
- to promote and market the country by impressing, and convincing the delegates, who are

usually important people in the international arena and can influence people with their attitudes easily, about the quality of services and richness of tourism resources.

Multipurpose congress centres in different sizes and capacities should be established particularly in large cities such as Istanbul, Izmir, Antalya, Ankara and operated by private sector and certain travel agencies should be encouraged to specialise in organising congresses and attend fairs and exhibitions related to congress and incentive tourism. Promotion and Marketing of incentive and congress should also be supported by incentives by the Ministry. The growth of business tourism built around congresses and conferences has contributed to growth of several regional centres of tourism, namely Lisbon, the Estoril Coast, Sintra, Madeira, the Algarve and Oporto in Portugal (ICEP Portugal __) and it can also contribute Turkey to create new regional centres as in Portugal.

Third-age tourism

"The reduced birth rate and longer life expectancy at birth means that the population as a whole is growing old and the proportion of pensioners is increasing and as a result of increasing "third age" section of population who want to participate in leisure and tourism activities at different times of the year, developing countries hold a great potential for the future expansion of tourism and the utilization of their resources for leisure and tourism in the widest sense" (United Nations 1988).

The survey carried out by Gokdeniz (1994) indicates that while 52% of senior visitors visit Turkey for holiday purpose, 23.3% for cultural, 11.4% health and 7.4% for religious purposes. The priority should be given to third age tourism as senior visitors demand thermal, health, golf, religious, cultural tourism at particularly quieter months of the year which can help reducing seasonal and spatial concentration. Therefore, Turkey should develop immediately an international model for the development of third-age tourism.

Youth tourism

It has been observed that despite the lower level of expenditures by young visitors, their average length of stay is significantly higher and this directly increase the multiplier effect of tourism on the local and national economy (Talu, 1995). In addition, youth tourism as an alternative tourism type provides opportunities to make new investments and provide new jobs to local people and investors. As young visitors stays in cheaper accommodation such as 2-star, 1-star hotels, boarding houses and youth camps, in shoulder of off-season months, they help the prolongation of main season in to off-season, better use of infra- and superstructure and increasing overall tourism revenues.

The youth tourism has been practised at a very low level in Turkey. There are several reasons for underdevelopment of youth tourism in Turkey:

- Very few parents and youngsters have adequate information on youth tourism; lack of promotion
- Very few youth tourism activities have been organised and few people are aware of these activities
- Small number of youth clubs and lack of coordination with international youth organisations
- Problems in providing discounted rates, financial support and travel insurance
- Few travel agencies specialised in youth tourism
- Lack of promotion and marketing activities in and out of Turkey
- Staffing problems
- The 50 US Dollars fee paid while going out of Turkey.

These problems should be either solved or improved significantly so that youth tourism can develop and help the industry from a different perspective in improving seasonal and spatial imbalance.

Thermal and health tourism

Health tourism is the provision of health facilities utilizing the natural resources of the country, in particular mineral water and climate (IOUTO 1973, Hall 1992).

Hall (1992) segmented the health tourism market into two distinct but related groups:

a) The health resort in which the emphasis on improving overall health and fitness
b) The spa resort which is specifically targeted at providing medical services to clients suffering from disease.

He concludes that health tourism will remain a small yet significant component of speciality travel for many years to come.

Development of thermal tourism in current tourism development areas provide following benefits;

Prolongation of the main season
Diversification of tourism products
Increase in occupancy rates
Provide balanced job opportunities to qualified personnel (balance in employment)
More productive and profitable industry

Development of thermal tourism out of current tourism development areas provide following benefits;

Development of new resources

Creation of new employment

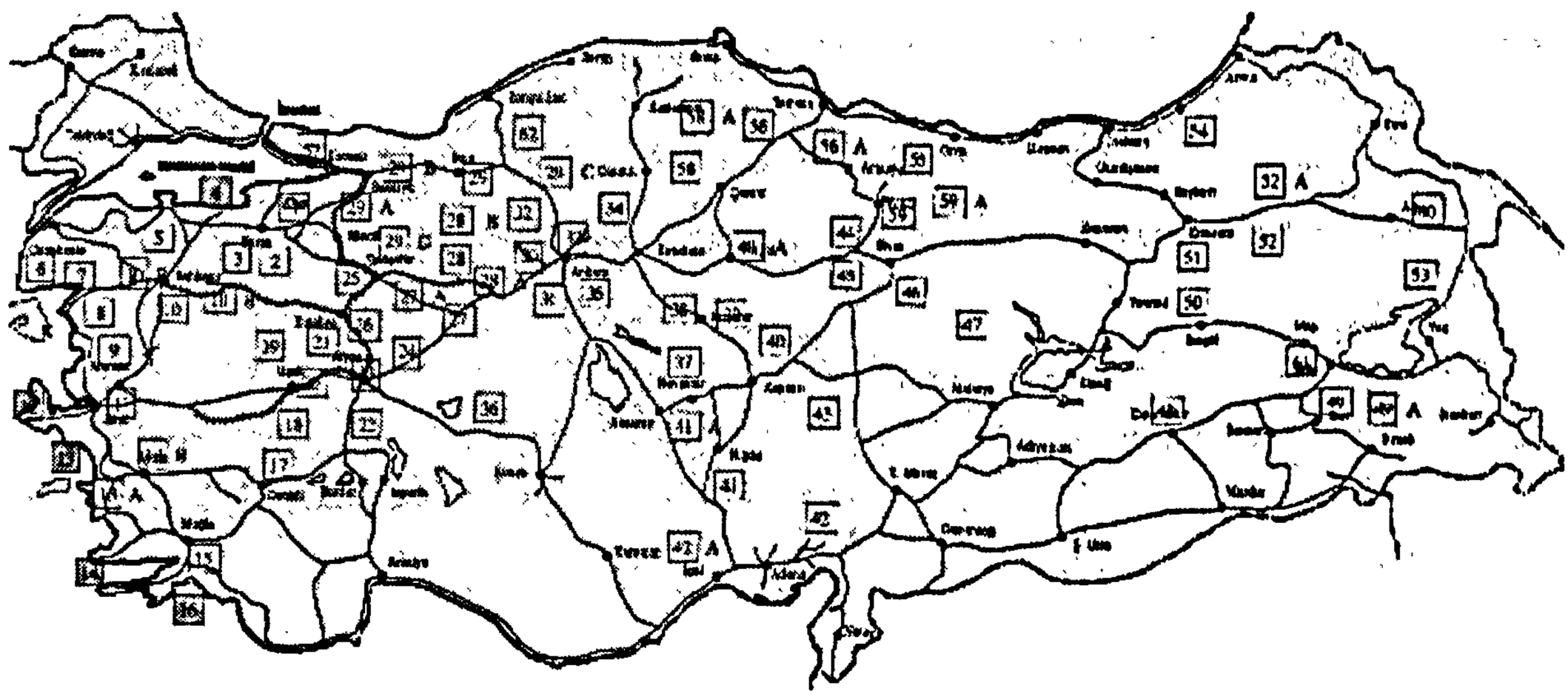
Easing concentration in coastal areas and attract visitors to inner areas

Balanced tourism development and activities between regions

The opportunities provided by thermal tourism (Turkish Ministry of Tourism 2000)

- direct impact on human health treatment
- it is environmentally friendly as they contain appropriate facilities in harmony with environment
- offers all-year round tourism in contrast to coastal tourism
- helps improving spatial imbalance and increasing diversity of tourism product in different regions
- can be integrated easily with some other environmentally friendly tourism types such as winter tourism, high-plateau tourism.
- high occupancy rates, competition power, employment and shorter investment return.

Map 5.1. Distribution of thermal resources of Turkey



Some of the well-known thermal centres (Map 5.1):

Hudai- Afyon	(Aegean)	Gonen- Balikesir	(Marmara)
Omer & Gecek- Afyon	(Aegean)	Oylat- Bursa	(Marmara)
Gazligol- Afyon	(Aegean)	Cekirge- Bursa	(Marmara)
Heybeli- Afyon	(Aegean)	Kestanbol- Canakkale	(Marmara)
Pamukkale- Denizli	(Aegean)	Yalova- Yalova	(Marmara)
Karahayit- Denizli	(Aegean)	Kos- Bingol	(East Anatolia)
Balcova- Izmir	(Aegean)	Sakar- Eskisehir	(C.Anatolia)
Cesme- Izmir	(Aegean)	Ilgin- Konya	(C.Anatolia)

Harlek- Kutahya	(Aegean)	Hamamyolu-Eskisehir	(C.Anatolia)
Sultaniye- Mugla	(Aegean)	Kizilcahamam-Ankara	(C. Anatolia)
Karacasu- Bolu	(Black Sea)	Balikli Cermik-Silvan	(C.Anatolia)
Kuzuluk- Adapazari	(Black Sea)		

As well as thermal resources, Turkey has several climate types and perfect climatic conditions for climate cures for health purposes as it has regions significantly different from each other and at different altitudes. Therefore, a better climatic condition not only indicates importance for the health of local people but also shows great importance for the development of both domestic and international tourism.

Ulker (1988) tried to identify the main peak tourism season for different regions of Turkey. He calculated the length of the main season by considering monthly average air temperatures, average number of sunny days I a moth and average monthly sea water temperatures. The results of his study summarised as follows:

Region	Length of the main season
East Anatolia & Central Anatolia (Van&Capadocia).....	4 months; based on the air temperature
Inner Aegean & South East Anatolia (Denizli&Adiyaman).	5-6 months; based on the air temperature
Southwest coasts to Southeast coasts (Bodrum to Hatay).....	7-9 months; based on the sea temperature
	7-8 months; based on the air temperature
Lower West Coast (Kusadasi).....	6 months; based on the sea temperature
Upper West Coast (Ayvalik).....	5 months; based on the sea temperature
Marmara Region North West Coast.....	4-5 months; based on the sea temperature
Western Black Sea.....	4 months;
Eastern Black Sea.....	5 months;

Ulker (1988) also mapped the important areas indicate importance for climatic cures, high-plateau and winter tourism and it is indicated on Table 5.1.

Caves, spelunking (cave exploration) and use of caves for tourism and health purposes

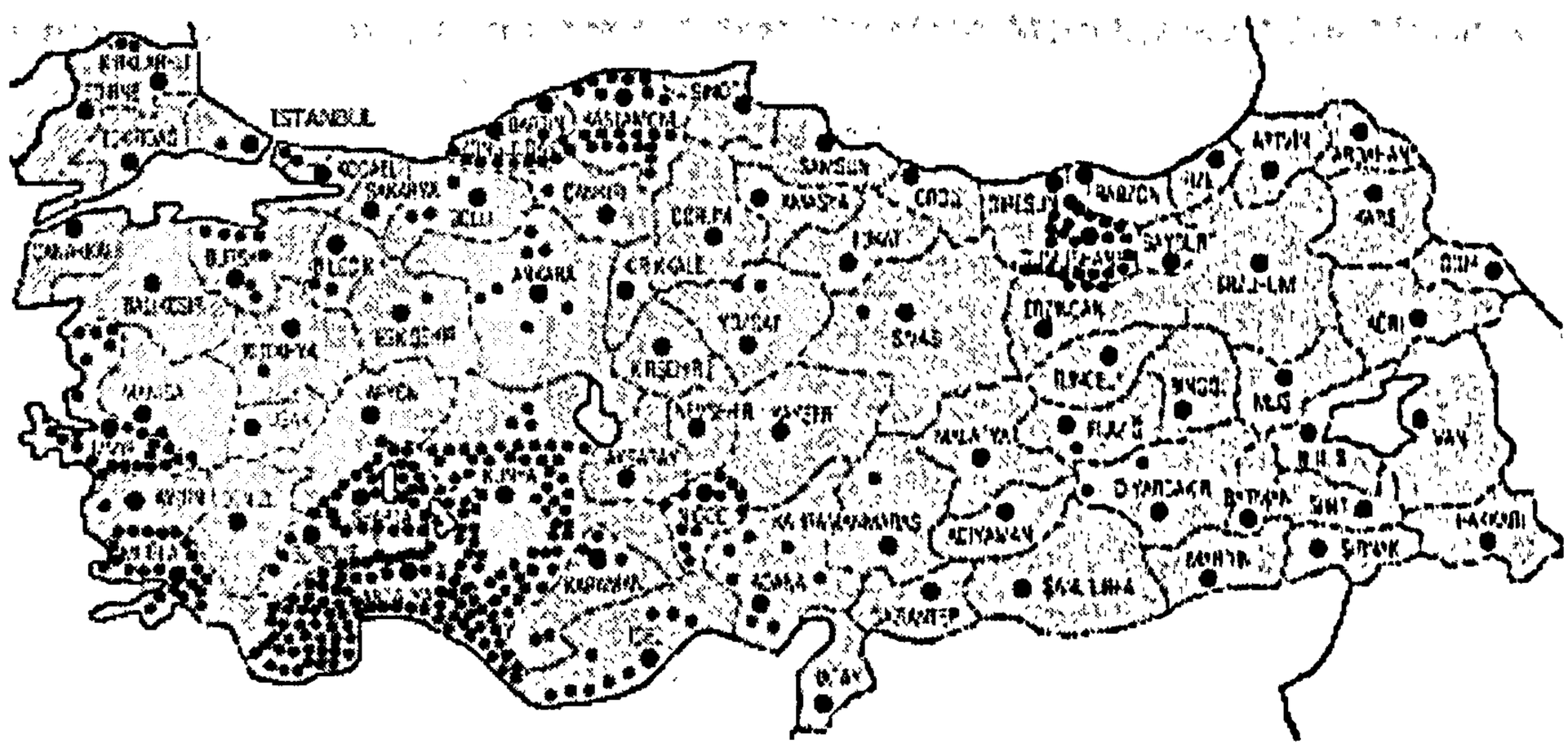
With their unique formations, characteristics and beauties, caves indicate importance for the tourism industry. Turkey has very rich and different caves. Taurus Mountains and Southern Anatolia are the most important regions in terms of caves (Ulker, 1988):

Antalya; Karain Cave	Sarkikaraagac; Pinarozu Cave
Alanya; Damlatas Cave	Hadim; Yerkopru Cave
Akseks; Duden suyu Cave	Ermenek; Maraspolis Cave
Burdur; Insuyu Cave	Kahramanmaras; Dongel Cave
Sutculer; Zindan Cave	Silifke; Narlikuyu Cave
Seydisehir; Susuz Cave	Lice; Birkileyn Cave
Seydisehir; Korukini/suluin Cave	

Table 5.1 The important areas for climatic cures, high-plateau and winter tourism

Province - Mountain	Climatic cures	High Plateau tourism	Winter (skiing) tourism	Mountain-eering
Bursa - Uludag	*	*	*	
Bolu - Koroglu Mountain	*	*	*	
Antalya - Bey Mountains	*	*	*	*
Mersin - Bolkar Mountains	*	*	*	*
Kars - Sarikamis	*	*	*	
Kastamonu - Ilgaz Mountain	*	*	*	
Aksaray - Hasan Mountain	*	*	*	
Alanya - Akdag Mountain	*	*	*	
Erzurum - Palandoken	*	*	*	
Kayseri - Erciyes Mountain	*	*	*	*
Ankara - Elmadag Mountain	*	*	*	
Kutahya - Murat Mountain	*	*	*	
Izmir - Bozdag Mountain	*	*	*	
Bitlis - Sapgor Mountain	*	*	*	
Erzincan - Munzur Mountains	*	*	*	*
Rize - Kackar Mountains	*	*	*	*
Trabzon - Duzkoy & Zigana Yaylas	*	*	*	
Agri - Agri Mountain (Mt. Ararat)	*	*		*
Hakkari - Cilo, Sat Mountains	*	*		*
Nigde - Aladag Mountains	*	*		*
Adapted from Ulker (1988)				

Map 5.2 Distribution of caves in Turkey



There have been several small, medium and large sized caves particularly in Mediterranean, Central Anatolia, South East Anatolia, Trace (Marmara) and North-West Anatolia. The Ministry of Tourism has made financial contributions to selected caves which are opened to visitors and cave explorers for the protection and conservation of caves and landscaping around the caves.

Tokat : Ballica Cave.
Gumushane : Karaca Cave.
Zonguldak : Gokgol and Cehennemagzi Caves.
Kirklareli : Dupnisa Cave.
Isparta : Zindan Cave.

The planning activities are continuing in provinces which have the potential for cave tourism such as Antalya, Burdur, Konya, Mersin, Zonguldak, Kastamonu and Isparta.

There are numerous caves with peculiar characteristics throughout Turkey. The locations of these caves are shown on Map 5.2. Developing cave tourism and spreading tourism in time and space is not just enough to secure stable Turkish tourism. The caves which have opened to tourism are plundered by treasure hunters because these caves are not protected enough and they become even more neglected than before.

High-plateau (traditional "yayla") tourism

High-plateau (Yayla) tourism planning and development activities have been continued by the Ministry since 1990. These activities have concentrate at high-plateaus where several social activities and festivals are held for long and where they demonstrate unique characteristics East and West Black Sea, Central Anatolia, West, Mid and East Mediterranean regions have several high-plateaus suitable for tourism activities.

The 26 high-plateaus have been declared as tourism centre (Turkish Ministry of Tourism, 2000):

Sinop : Ayancik-Akgol, Gerze-Kozfindik-Bozarmut, Turkeli, Kurugol high-plateaus.
Ordu : Cambasi, Akkus-Argin, Aybasti-Persembe, Mesudiye-Keyfalan, Mesudiye-Topcam-Yesilce high-plateaus.
Giresun : Bektas, Kumbet, Yavuzkemal high-plateaus.
Trabzon : Caykara-Uzungol, Akcaabat-Karadag, Tonya-Erikbeli, Macka-Solma, Arakli-Pazarcik, Yesilyurt-Yilantas high-plateaus.
Rize : Anzer, Ayder spa high-plateaus.
Artvin : Kafkasor, Kackar high-plateaus.
Gumushane : Zigana (ski centre).
Bayburt : Kop Mountain (ski centre).
Gaziantep : Hizir (Huzurlu) high-plateau.
Manisa : Spil Mountain
Antalya : Ibradi high-plateau.

Planning activities have been continued in;
Cankiri : Yaprakli-Buyuk high-plateau.
Trabzon : Salpazari-Sis Mountain high-plateau.
Tokat : Almus-Cihet high-plateau.
Trabzon : Koprubasi-Kosk high-plateau.

However, there is a problem of infra- and supra-structure, transport and security in high-plateaus. Without solving these basic problems many unexpected situations could be faced such as getting negative results from marketing and promotion activities and lower demand than expected.

Winter tourism

As seen on Map 5.3 and Table 5.2 indicates ski and mountaineering centres indicates quite even distribution in Turkey and with appropriate development, promotion and marketing policies and strategies it can be beneficial for less-developed tourism regions and its people in inner Anatolia. It would help to maintain spatial balance in tourism movements, although development of this type of tourism may worsen overall seasonality due to seasonal nature of winter tourism. However, mountains and the facilities may be facilitated all-year round.

The winter tourism and winter sports centres declared as tourism centres according to tourism encouragement law are as follows:

- Bursa- Uludag winter sports	(Marmara)
- Kocaeli-Kartepe	(Marmara)
- Isparta- Davraz Winter Sports	(Mediterranean)
- Antalya- Alanya, Akdag Winter Sports	(Mediterranean)
- Kayseri- Erciyes	(C. Anatolia)
- Aksaray- Hasandagi	(C. Anatolia)
- Kastamonu- Cankiri, Ilgaz Winter Sports	(Black Sea, C. Anatolia)
- Bolu- Koroglu	(Black Sea)
- Gumushane- Zigana	(Black Sea)
- Bayburt- Kapdagi	(Black Sea)
- Kars-Sarikamis	(E. Anatolia)
- Erzurum- Palandoken	(E. Anatolia)
- Bitlis- Sapgor	(East Anatolia)

Map 5.3 Distribution of ski and mountaineering centres in Turkey

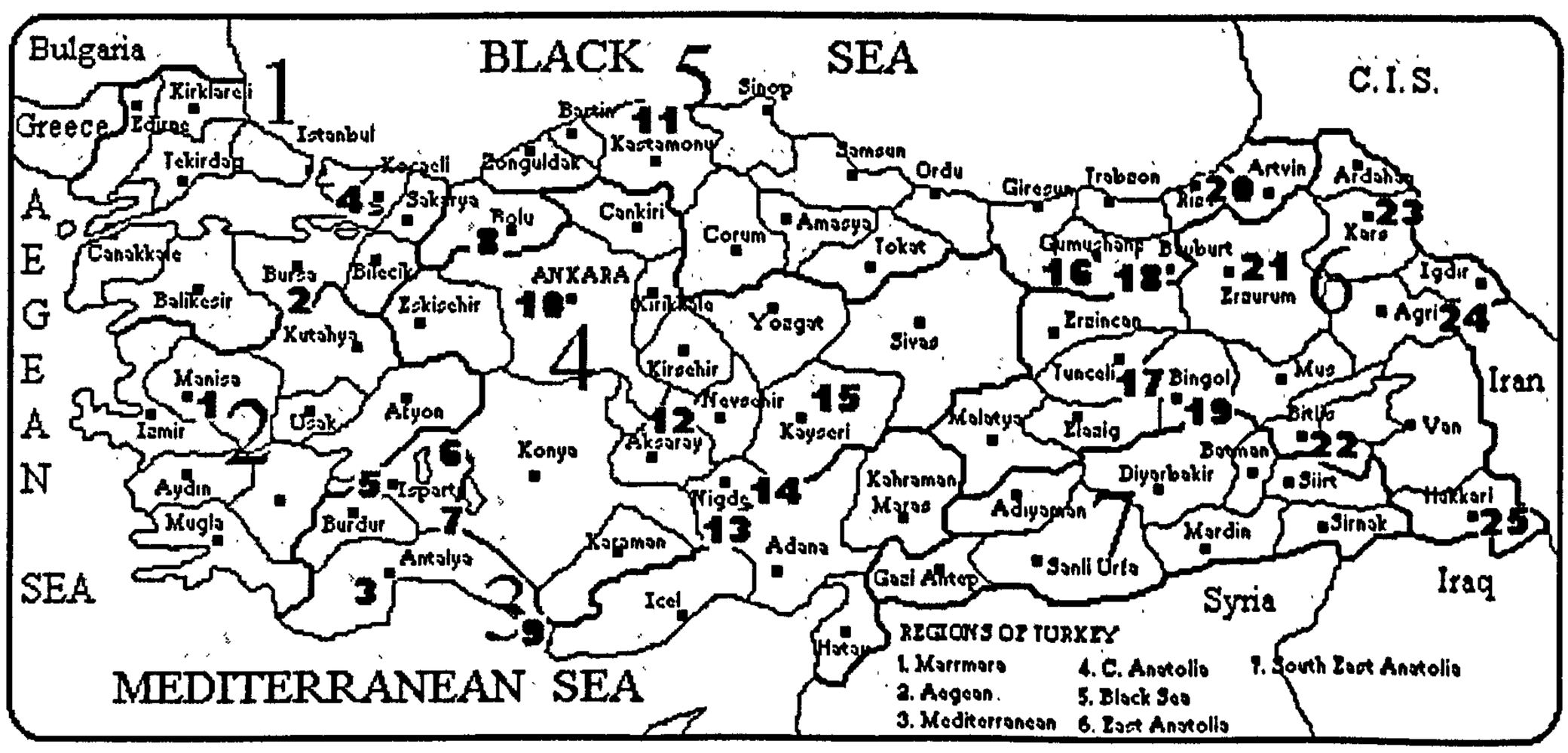


Table 5.2 Distribution of ski and mountaineering centres in Turkey

Ski Centres		Mountaineering Centres	A	B	C
1. Manisa-Izmir, Bozdag	12. Aksaray, Hasan Dagi	3. Antalya, Beydaglari	***	*	**
2. Bursa, Uludag	15. Kayseri, Erciyes Dagi	7. Isparta, Dedegol Daglari	**	*	*
3. Antalya, Beydaglari	16. Gumushane, Zigana	9. Antalya-Alanya, Akdag	***	*	*
4. Kocaeli, Kartepe	18. Bayburt, Kop Dagi	12. Aksaray, Hasan Dagi	*	**	***
5. Antalya, Saklikent	19. Bingol, Bingol Daglari	13. Nigde, Bolkar Daglari	***	*	***
6. Isparta, Davraz	21. Erzurum, Palandoken	14. Nigde, Aladaglar	***	***	***
8. Bolu Kartalkaya	22. Bitlis, Sapgor Dagi	15. Kayseri, Erciyes Dagi	*	***	**
9. Antalya-Alanya, Akdag	23. Kars, Sarikamis	17. Tunceli, Munzur Daglar	**	**	*
10. Ankara, Elmadag		20. Rize, Kackar Daglari	***	**	***
11. Kastamonu, Ilgaz Dag		24. Agri, Agri Dagi -Ararat	*	***	*
		25. Hakkari, Cilo-Sat Dagla.	*	***	*
*** Very Good ** Good * Average		Suitable for A: Trekking B: Mountaineering C: Ski Tour			
Source: Turkish Ministry of Tourism (2000a) Turkiye'de turizm Yatirim olanaklari ve yatirim sureci, General Directorate of Investments, Ankara, Turkey					

Mountaineering and trekking/hiking

The primary mountains suitable for mountaineering (Table 5.2, Map7):

Agri	: Agri Mountain (Mt. Ararat)	5137m
Bitlis	: Suphan Mountain	4058m
Hakkari	: Cilo & Sat Mountains	4136m
Rize	: Kackar Mountains	3932m
Nigde	: Taurus-Ala Mountains	3756m
Kayseri	: Erciyes Mountain	3917m

The secondary mountains:

Antalya	: Bey Mountains	3086m
Nigde	: Bolkar Mountains	3524m
Erzincan	: Munzur Mountains	3462m
Bitlis	: Nemrut Mountain	3050m

Important areas and mountains for trekking/hiking:

Mediterranean Region

Along the Mediterranean coasts	: Ala, Bey, Bakir Mountains
Konya-Hadim-Ermenek area	: Geyik Mountains
Surroundings of Goksu River	: High plateaus of Anamur
Icel on the Mediterranean coast	: Mountainous areas of Mut
Adana-Kozan-Kadirli	: High plateaus

Mentese, Akcaki, Tahtali, Binboga Mountains
The region between Tarsus, Hatay and Bolkar Mountains

Aegean Region
Bafa Lake and Besparmak Mountains, Kaz and Boz Mountains

Marmara Region
Kirklareli and Istiranca Mountains

Black Sea Region
Ilgaz and Kure Mountains, The high plateaus between Trabzon-Uzungol and Artvin-Savsat, Kackar Mountains.

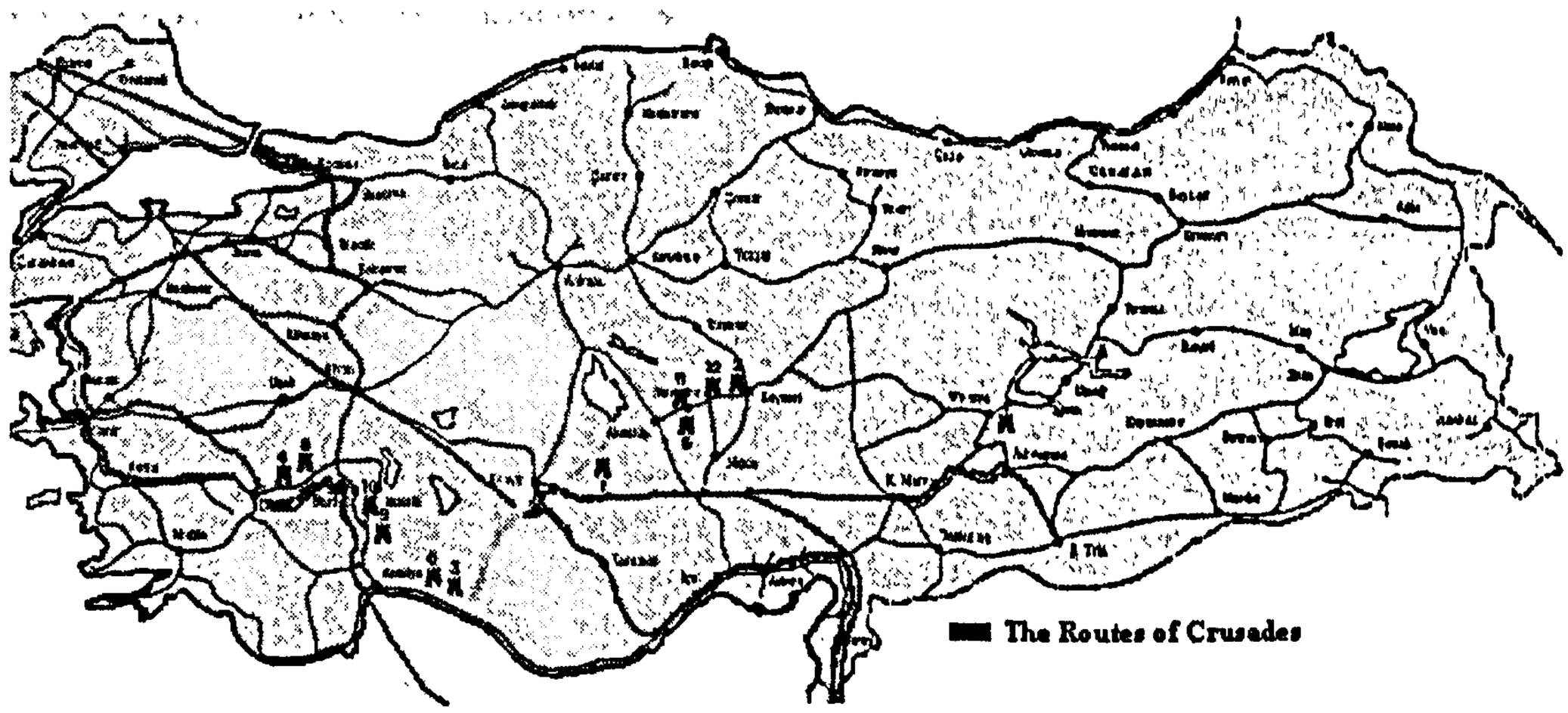
Religious (belief) tourism

Turkish Ministry of Tourism (2000) identified total of 316 religious places indicates significance for Muslims (167), Christians (129) and Jews (20).

The Islamic countries and Islamic tourism is neglected and not seen as potential markets. It is understood that Turkish religious tourism policies will be intensified on Christianity and Jew religions mostly. However, Turkey played and important role in the history for all important religions, in particular Islam. Therefore Turkey should attract tourists from Islamic countries as well as from western countries. Turkey must emphasis its importance for major religions of the world.

The routes of crusades and important places along these routes are shown on the Map.

Map 5.4 The routes of crusades



The fact that these works of art that have attained to our times as a result of our nations' notion of respect and high esteem to other religions enable Turkey to gain an advantageous position among the other countries. The evaluation of the interests of people to visit religious centres out of the consideration of regular fulfilments can be identified as Faith Tours in the scope of tourism phenomenon (Directory General of Pres and Information of the Prime Ministry 2002)

Most significant places for Christians recommended by Vatican to Christians are as follows:

	Province	Region
St. Pierre	Hatay	(Mediterranean)
St. Paul	Icel	(Mediterranean)
St. Nicholas Church	Antalya	(Mediterranean)
Psidia Antique City	Isparta/Yalvac	(Mediterranean)
Sard	Manisa	(Aegean)
Akhisar Church	Manisa	(Aegean)
House of Virgin Mary	Izmir	(Aegean)
Laodikya Antique City	Denizli	(Aegean)
Hagia Sophia Mosque	Bursa/Iznik	(Marmara)
Derinkuyu Orthodox Church	Nevsehir	(C.Anatolia)

River sports tourism

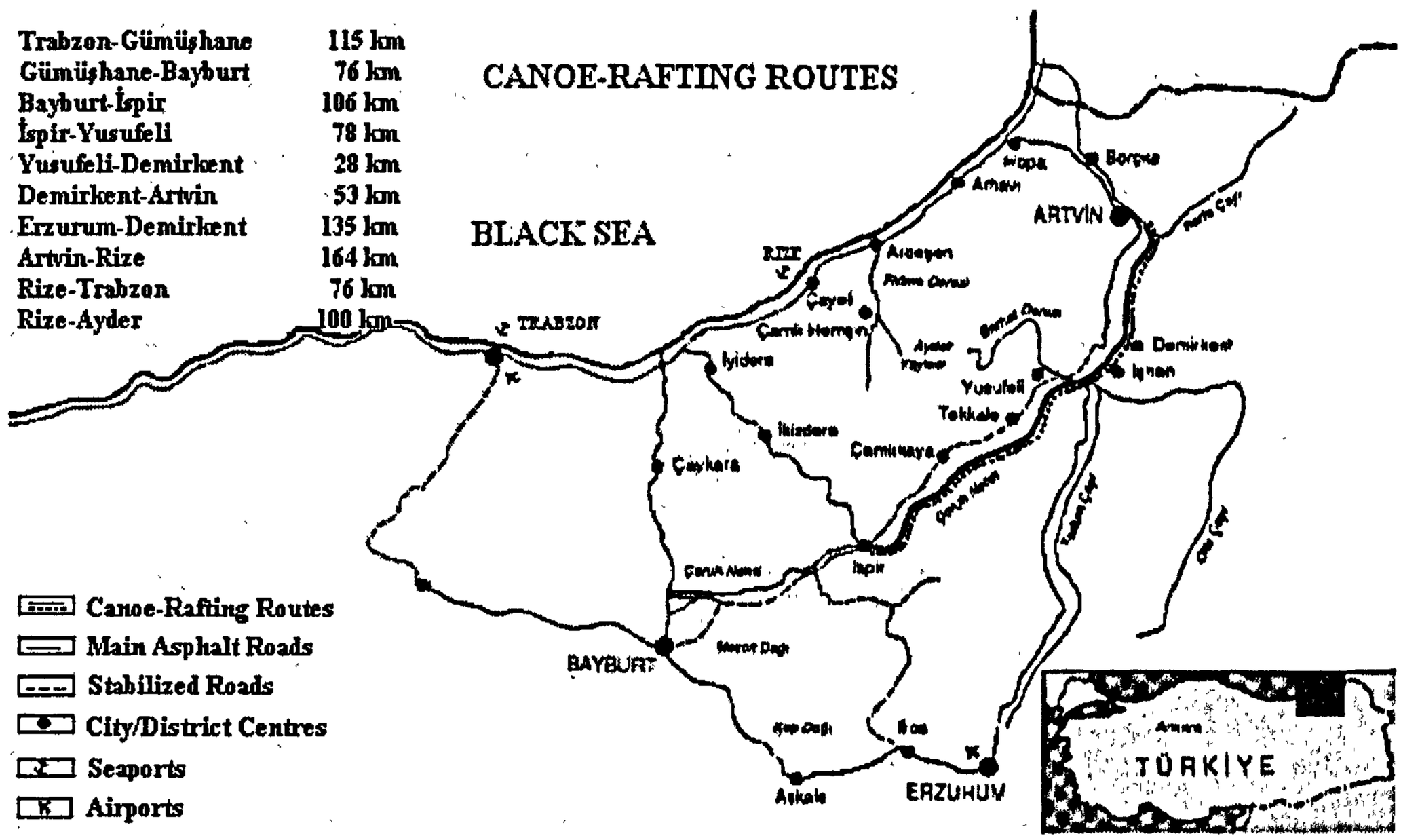
The Turkish Rivers provide significant conditions for canoeing and rafting. As listed in the previous chapters, Turkey is very rich in terms of rivers which are suitable for various water sports like white water rafting, canoeing and water skiing. The river sports tourism does not require high capital investments and can easily be integrated with historical, cultural, archaeological and other natural resources located along with the rivers. Canoeing and rafting provides also a special opportunity for those who want to discover nature. With the start of the development of river sports tourism , new white water rafting and canoeing clubs have been established and special competitions and tours have been organised.

The following rivers were identified as suitable rivers for river sports tourism at the firs instance. The studies have been continued in different regions to find out the rivers suitable for water sports activities (Map 5.5).

Eastern Black Sea	: Coruh River, Altiparmak (Barhal) Stream and Firtina Valley Stream
Mid.& East Mediterranean	: Koprucay, Alara, Dim, Manavgat, Anamur (Dragon) Streams, Goksu River, Dlaman, Adana-Feke Goksu Stream
Central Anatolia	: Kayseri-Zamanti River (between Yahyali and Kapuzbasi waterfalls) Kizilirmak River (between Kayseri and Ankara-Keskin)
East Anatolia	: The Euphrates River (between Tercan and Kemah-Erzincan)

However, before introducing rafting to number of enthusiasts, number of measures should be taken. A good organisation of activities, accommodation, transportation and security arrangements are essential. Otherwise, potentially possible losses of life and property would cause negative image and propagation and it would become impossible to reach forecasted aims and objectives by developing and introducing rafting.

Map 5.5 The canoe and rafting routes in Eastern Anatolia and Black sea



Windsurfing

An ideal climate, wind, reasonable cost, secluded bays provide opportunities for windsurfers along the Black Sea, Marmara, Aegean and Mediterranean coasts and at interior lakes which should no be missed out.

Fly fishing

Fly fishing is permitted for tourists in non-prohibited regions without obtaining fishing license with the condition of using only amateur and non-commercial equipment.

The golf tourism

The golf tourism has indicated a significant development trend since last decade. Turkey aims to integrate several sport facilities with golf facilities in a planned organised manner. Major international tournaments are planned in the near future to develop golf tourism in Turkey. According to studies, there are around 37 million golf player worldwide and this number indicate 20% increase every year which indicates great potential for Turkish tourism industry to diversify its product range (Turkish Ministry of Tourism 2000a). Well maintained and secluded golf courses were established on Marmara, Aegean and Mediterranean coasts and in Ankara. 18-hole links maintain the international standards. Around ten golf courses have been planned along the Aegean and Mediterranean coasts, namely 9 in Antalya and 1 in Mugla. In addition, golf courses have also planned in Izmir and Istanbul. Golf is a kind of recreation preferred by the high income level foreign visitors which may contribute overall tourism receipts significantly.

Air sports

Almost all types of wind and air sports can be done several locations throughout Turkey. These sports include; Single engine flights (Ankara), parachuting and plane gliding (Eskisehir), hand gliding, para-gliding, hot air ballooning (Cappadocia)

Hunting and wild life

Foreign visitors can only hunt in parties organised by Turkish travel agencies which have been authorised by the Ministry of Agriculture and Rural Affairs. Several Turkish travel agencies have organised pre-planned hunting tours particularly in Aegean and Mediterranean region at different times of the year.

Due to its geographical location, Turkey has various ecosystems and climate zones within its boundaries. As a result of this, there are rich varieties of species with respect to fauna. The results of the scientific researches, done until the present day, stated that 120 mammal, 439 bird, 130 reptile and 345 fish species exist in the country. 320 bird and 28 mammal species are currently under protection which are deer, wild goat, chamois, fallow deer, roe deer, gazelle, wild sheep, pheasant, patridge, kahlibis.

Adventure and special interest tourism

The adventure tourism activities can be outlined as follows:

Backpacking (bush-walking, tramping)
Cross-country skiing
Hang-gliding
Mountain biking
Rappelling
Rock-climbing
Sailing (yachting)
Sea kayaking
Windsurfing
Horse riding in nature
Parachuting
Bicycle-touring
River kayaking
Hot-air ballooning
Orienteering
Rogaining
Scuba diving
sky-diving
snowshoeing
Para-gliding
Slope parachuting

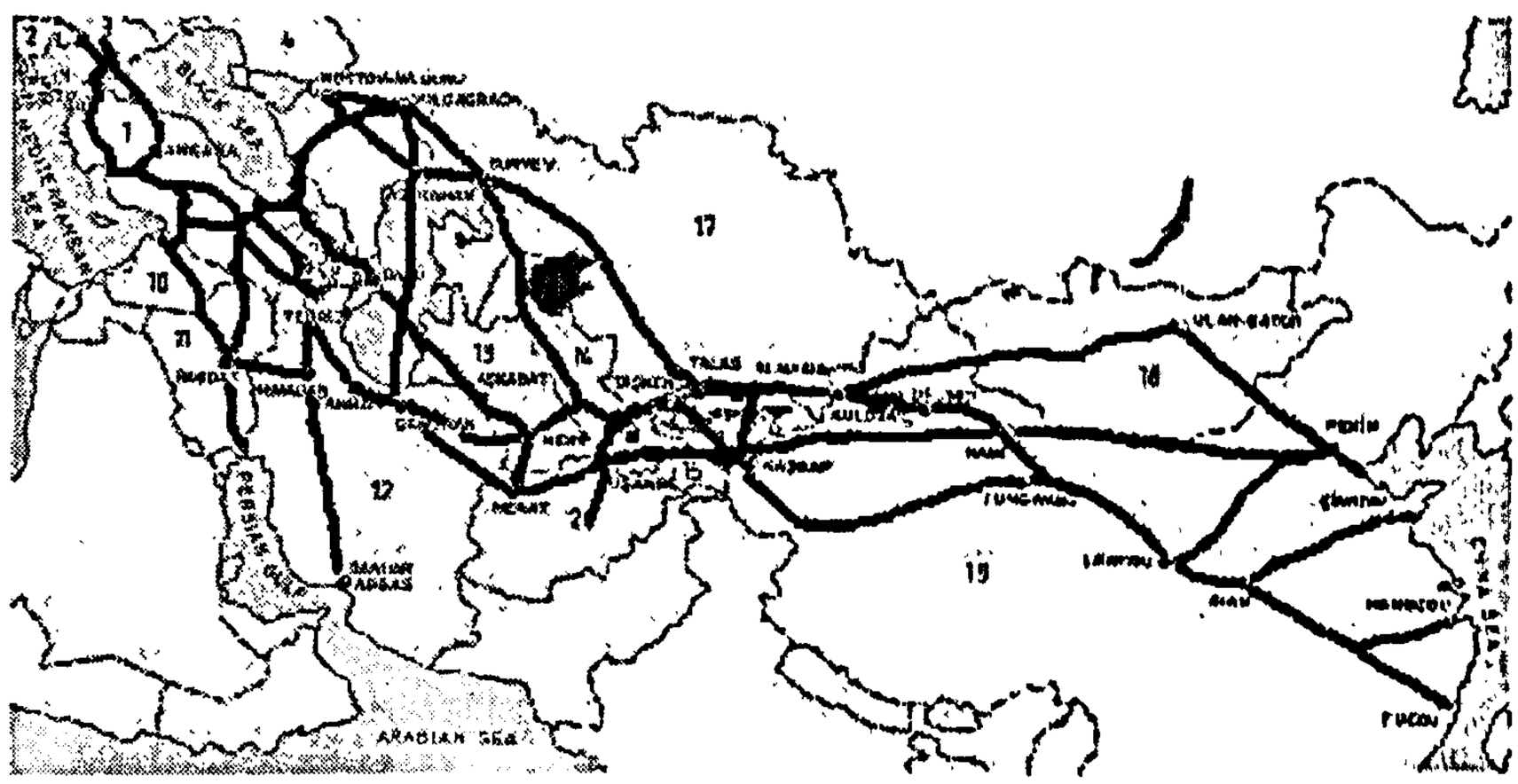
Special interest tourism can be the most important factor to spread tourism all year-round and throughout Turkey. All regions have plenty of resources for the development of special interest tourism. However, Turkey is very slow to bring these resources to life and use and benefit from adequately those resources which were already introduced because of lack of organisation, careful planning, investment and management of attraction and facilities.

The laws should be introduced to regulate the special sports activities which require special training and qualification. For example, because there were no legislation about diving in caves and no security measures taken around this cave, a German couple died in a cave around Antalya as a result of their empty oxygen tubes. This kind of places must be protected, necessary warnings should be placed around these places and visitors who want to dive in these places should be required special permits from local authorities.

The cultural and exotic Silk Road

The Turkish Ministry of Tourism (2000a) initiated Silk Road project in 1993 which aims to restore old hans and caravanserais along the Silk Road and use all for tourism purposes (Map 5.7). Silk industry, had taken a very important place of various nations from ancient times; and silk and spice coming from Far East, had played an important role for Western world in international relations. Silk is also maintained the identification of Eastern Culture by Western societies. Transportation of silk and spice of East via caravans, is formed the commercial roads reaching to Europe from China (Map 5.6).

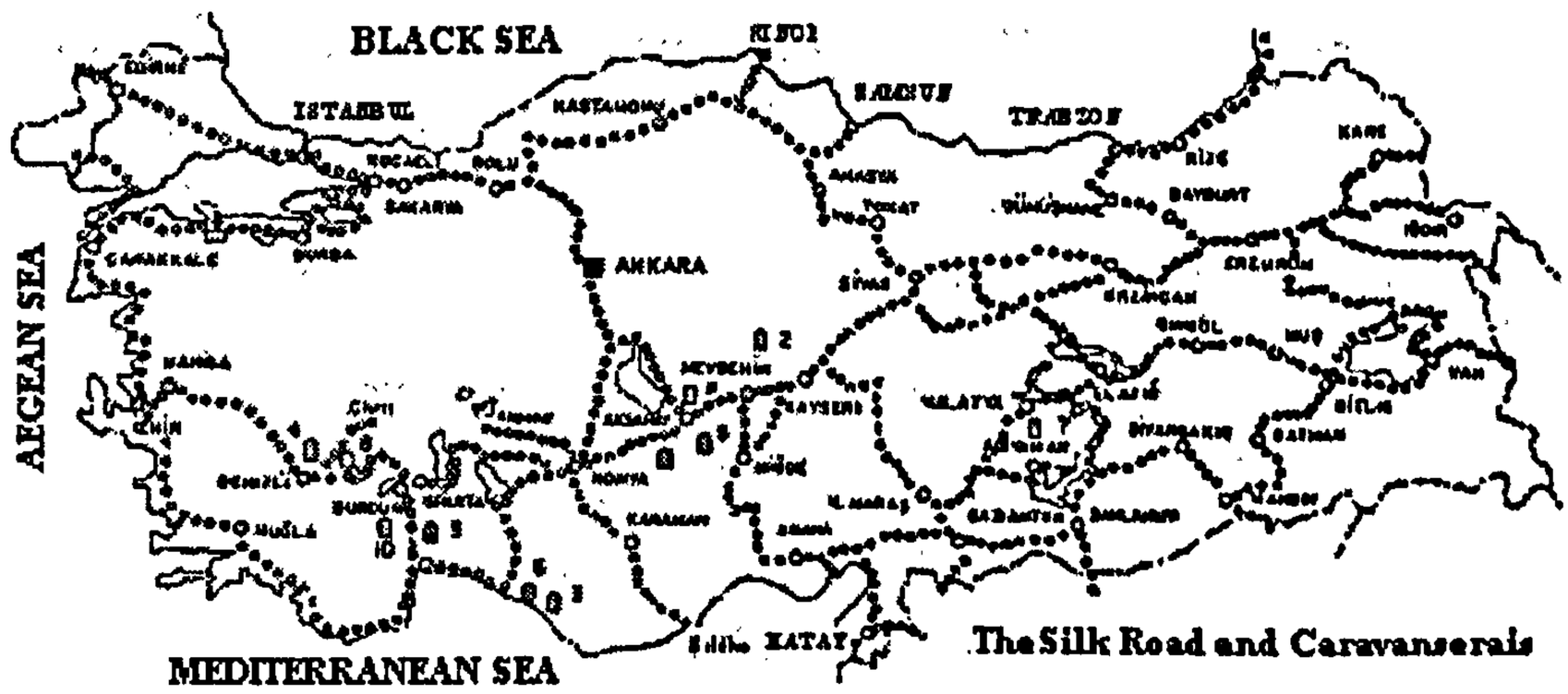
Map 5.6 The routes of international Silk Road



In this commercial movement improving from east to west, a road network, used since previous ages, had been benefited. These thousands of kilometres long caravan roads, which allow cultural relations between continents besides dense transportation of silk, porcelain, paper, spice and jewellery, are named as "Silk Road" in the course of time. Silk Road, beyond being a commercial road connecting Asia to Europe, is holding the signs of cultures, religions and races, who lived in the region for 2000 years, and serves an extraordinary history and cultural wealth. After gaining of independence of Middle Asia Turkish Republics, re - animation of silk road both as a commercial road and also a historical and cultural value is considered, and works for protection and existence of structures which are constructed throughout this road but not used today with giving them new

functions, is commenced. Alternative tourism types are tried to be developed in appropriate regions and the Silk Road project is one of them (Yarcan 1996).

Map 5.7 The routes of Anatolian Silk Road



National parks, wild life, wetlands of Turkey

There are 33 parks which can be used to attract nature lovers and declared as National Parks of Turkey. They occupy total of 686.631 Ha (http://www.twarp.com/nature/park.htm).

Yozgat Pinewoods Natural Park
Karatepe Aslantas National Park
Kus Cenneti National Park (Bird Sanctuary)
Seven Lakes National Park (Yedi Goller)
Dilek Peninsula National Park of Menderes Delta
Termessos-Gulluk Mountain National Park
Olympus Beydaglari National Park
Historical National Park Of Gallipoli Peninsula
Baskomutan Historical National Park
Macka Altindere Valley Natural Park
Bogazkoy Alacahoyuk Historical Natural Park
Kazdagi National Park
Hatilla Valley National Park
Altınbeşik Cave National Park
Aladağlar National Park
Saklıkent National Park
Kastamonu-Bartın Kure Mountains National Park
Uludag National Park
Soguksu National Park
Spil Mountain National Park
Kizildag National Park
Kovada Lake National Park
Munzur Valley National Park
Koprulu Canyon National Park
Ilgaz Dagi National Park
Goreme Historical National Park
Nemrut Mountain National Park
Beysehir Golu National Park
Kackar Mountains National Park
Karagöl-Sahara National Park
Honaz Mountain National Park
Marmaris National Park
Troya Historical National Park

Turkey, except Confederation of Independent States, is the richest country in wetlands among the countries in Europe and the Middle East. As our country is located on the migration path among Europe, Asia and Africa these wetlands have great importance especially for water birds. The wetland that shelters more than 25.000 water birds is categorized as A-level according to IUCN criteria. There are 19 wetlands which are categorized as A-level. In eleven of these lands, some precautions are applied for the protection of birds. These wetlands are:

Kus Cenneti National Park
Dilek Peninsula Menderes Delta National Park
Seyfe Lake nature protection site
Goksu Delta water birds' protection site
Kizilirmak Delta water birds' protection site
Camalti Tuzlasi water birds protection site
Sultansazligi nature protection site
Beysehir Golu National Park
Gala Lake nature protection site
Akyatan Lake water birds' protection site
Burdur Lake water birds' protection site

Five of the wetlands which are excluded from the A-level category are categorized as 'Water birds protection sites'.

National parks, natural parks and forest recreation sites serve more than fifteen million local and foreign tourists annually. The camping sites, with a capacity of 5.000 tents, offer unique opportunity to have cheap holidays for more than one million people.

Youth tourism

Having the great majority of her population being composed of young people, Turkey embodies camp centres and facilities enabling the young people living in abroad and in country the opportunity to enjoy an easily acquired holiday

Domestic tourism

Domestic tourism is underdeveloped in Turkey; there are not sufficient statistical data on domestic tourism, and there are serious economic and cultural barriers acting against the development of domestic tourism although there is some potential market for domestic tourism (Kusluvan 2002). The lack of holiday taking habits, financial difficulties and low level of income, small number of domestic package holiday producers, high price policy for domestic travellers and popularity of second homes in usually coastal areas have hampered the development of domestic tourism. By practising justified policies and providing equal opportunities for domestic travellers, encouraging domestic package holiday producers, concentrating promotion and marketing activities in domestic market, encouraging youth and students to travel and offering financial assistance, the potentially available domestic tourism market can be activated. As Seckelmann (2002) states, domestic tourism, that does not require an extensive investment and change as the international market,

could become a basic element of a socially and economically sustainable regional development in Turkey.

5.5. Evaluation and identification of existing and potential markets

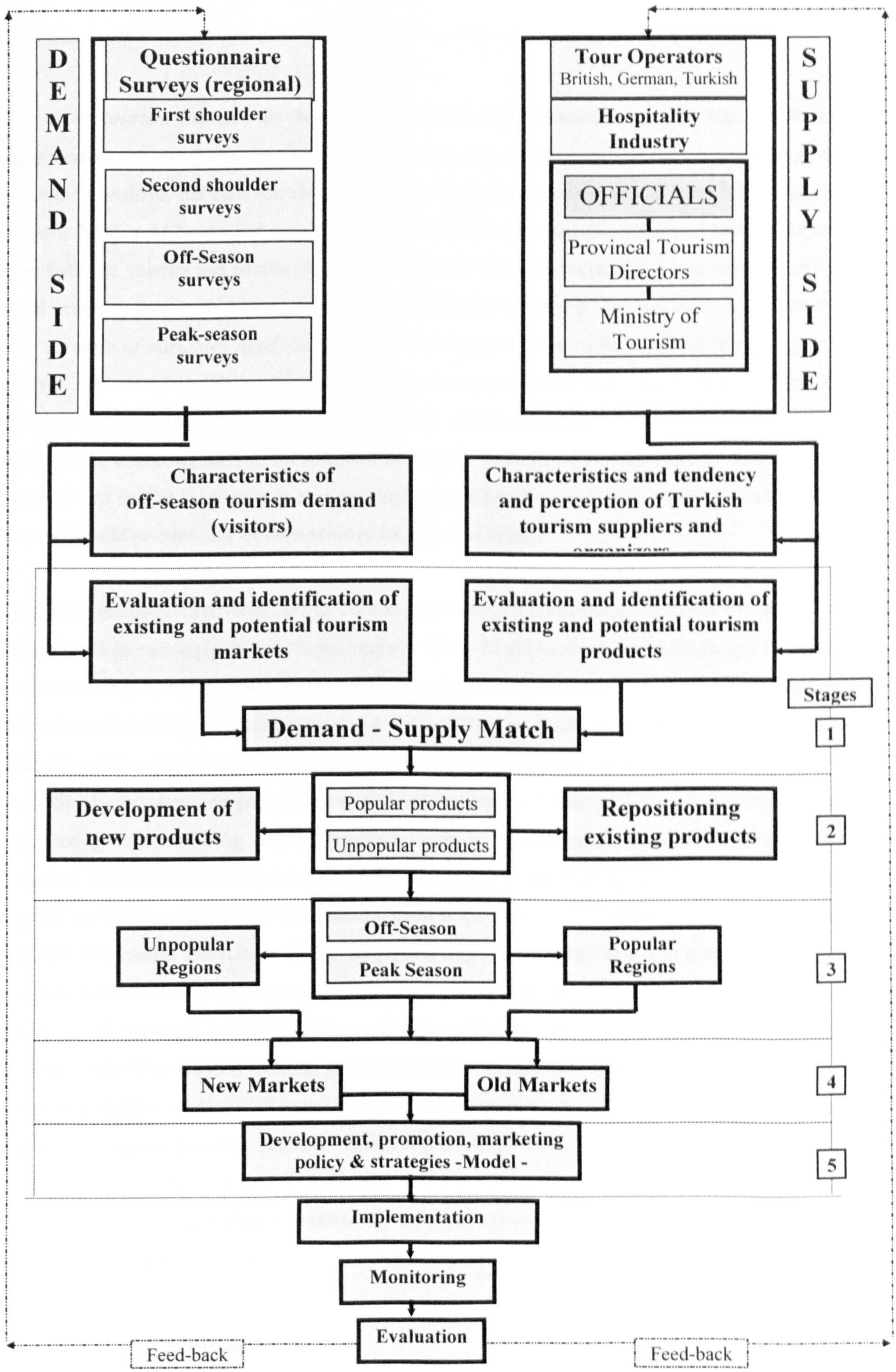
As many other destinations, Turkey has attracted visitors from all around the world. Visitors purpose of visit varies from holiday and cultural to health and sports. They also visit different regions for usually different purposes. In the development of new products or improvement / repositioning of existing products, it is essential to determine who the present and potential markets are and the characteristics, expectations and requirements of each market to prepare and implement appropriate marketing and promotion plans (Figure 5.3). Therefore, a number of issues must be addressed as follows:

1- Who visits the region at present?
2- Are there potential tourist markets that can be attracted to the region?
3- Are these markets are seasonal? Can they be attracted to the region all year-round?
4- What are the possible expectations and requirements of these markets?
5- How will the products be promoted and marketed in the existing and potential markets?
6- Co-operation between public and private sector in regional marketing and promotion.
7- Consideration of domestic markets

5.6. Assessment and proposition of possible development, promotion and marketing policy and strategies

As O'Driscoll (1984), individual countries will need individual solutions, although main common policy and strategies may apply to most destination countries. A supply - demand model which aims to show relationships between temporal and spatial aspects of tourism taking into account the main market segments, products, economic costs of seasonality and the benefits of market targeting and product diversification should be developed. Effective tourism development and marketing strategies and guide-lines for all public and private sectors of the Turkish tourism industry should be developed to improve spatial and temporal patterns of tourism activities in Turkey. In the next stage, the Turkish Ministry of Tourism, Provincial Tourism Directorates and all related government and non-government authorities and organisations should involve in the implementation of policy and strategies (Figure 5.3).

Figure 5.3 Temporally and spatially balanced tourism development process



Chapter 6

Conclusions

'*The term 'tourism impact' has been gaining increasing attention in the tourism literature. A major reason for rising interest has been the increasing evidence that tourism development leads not only to positive, but also has the potential for negative, outcomes at the local level*' (Koa and Stewart, 2002, p.512). Archer and Cooper (1998) also argue that the impact of tourism depends upon both the volume and profile of characteristics of the tourists (length of stay, type of activity, travel arrangement, mode of transport etc.). Therefore, Archer and Cooper (1998, p.64) conclude that '*a range of variables needs to be taken into account in any determination of the impact of tourism*'. As stated in the beginning, this study aims to contribute to development of effective strategies to form a spatially and temporally more evenly distributed Turkish tourism product by investigating analyzing the current temporal and spatial patterns of Turkish tourism. In this respect, temporal and spatial imbalance in tourism can be described amongst those problems which need to be investigated to minimize or even remove its negative affects.

It has been indicated that variations in Turkish tourism have increased and tourism movements are concentrated increasingly in the coastal regions of the Mediterranean and Aegean and in summer season since the late 1980s, while other regions and seasons are neglected. This reflects a lack of a national tourism policy implementation and failure of present policy and strategies to combat the potentially damaging effects of tourism on social and environmental resources. In addition, private and official marketers and promoters of Turkish tourism in Turkey and abroad favour short-term economic gain by offering popular products, usually sea-sun-sand, to Western consumers in unspoiled and undiscovered destination environments, without thinking about long-term negative impacts and disadvantages. It is obvious that there is a certain relationship and correlation between seasonal and spatial imbalance. Therefore, modelling these relationship and correlation can and will help to achieve better balanced tourism development and management in Turkey. However, as the results of this study indicated, visitors who are willing to visit different and unpopular regions of Turkey shoulder seasons exist in the marketplace. Seasonality is a considerable problem for resorts like Antalya in the Mediterranean region. German respondents stated that they would prefer visiting Antalya in shoulder seasons which might contribute to the alleviation of the negative effects of temporal fluctuations. The German market needs to be reached by appropriate tools and encouraged to travel to different regions of Turkey in off-season months. Therefore, it is still not too late to take the actions necessary to overcome today's difficulties and tomorrow's problems.

Jefferson (1991), states that there are three tourism product developments types:

i) Demand-led (Products are demanded by customers first, then suppliers respond to this existing demand)

ii) Supply-led (Products are developed first and subsequently suppliers look for customers for existing products)

iii) Market-led (Balance is maintained between demand and supply and both customers and suppliers respond to each others requirements Some products are developed and supplied to meet existing demand and some products are developed first and promoted / marketed later)

He emphasises that tourism product development must be market led. Market-led tourism allows;

- suppliers to develop and market products as they want beside the products already demanded by customers, and
- customers to consume the products they wish to have as well as products offered by producers.

In other words both suppliers and customers have the bargaining power in the production and consumption of tourism products. The Turkish tourism product is a demand-led product which responds to an existing demand, such as a need for sun, sea and sand. Therefore, Turkish tourism industry is largely dependent on its tourist markets. Considering the top five tourist markets to Turkey, respectively Germany, Britain, France, USA and Greece, none is counter-seasonal. The main tourism markets are highly seasonal, accounting for more than 75% of arrivals in peak season.

Since Turkey currently has demand-led tourism product, which is mostly sun, sea and sand, almost all tourism activities are concentrated on the Western and Southern coasts of Turkey. The Mediterranean, Aegean and Marmara regions, which include Istanbul, Antalya, Mugla and Izmir, accounted for more than 81% of bed capacity in 2003 and 93% of nights spent by foreign tourists in 2003. Göymen (2000, p.1030) stresses that '*a pronounced spatial dichotomy has evolved in Turkish tourism between a privileged space along the coast and an underprivileged space in the interior of the country*'. Tosun and et al. (2003, p.134) explained the reasons behind spatial imbalance and concluded that '*the way in which tourism development was encouraged via fiscal and monetary instruments, and the forms of tourism supported by international tour operators, have widened regional disparities in the country*'. As Smid and Loewendahl-Ertugal (2002) state, '*there is no experience with nation-wide regional policies except for the GAP project (South Eastern Anatolia Project)*'. Despite the potential and the Turkish Ministry of Tourism's recent

initiatives to introduce and develop new tourism products in other regions, imbalanced tourism development between regions is still a serious problem.

Turkey has great unspoiled natural, cultural and historical resources and potential which certainly can help Turkey to develop supply led tourism products as well as demand led products and to combine both products in order to create market led product. This will help to improve the uneven temporal and spatial distribution of tourism throughout the year and the country. Regional tourism development policies, strategies and implementation plans with goals to reduce both spatially and seasonally uneven distribution of tourism should be introduced. Giving more power to local authorities in planning could encourage balanced tourism development in less-developed tourism regions. When one considers the estimated tourism income multiplier value for Turkey is 1.98 Fletcher and Snee (1989), the economic importance of tourism in less-developed tourism regions of Turkey becomes much clear.

Tourism product diversification is essential. Although Turkey entered the international mass tourism market later compared to other Mediterranean countries (Clements and Georgiou 1998), Turkey's experience of mass tourism has been brief, but potentially damaging (Cooper and Ozdil 1992). The tourism business in Turkey has become a mass industry concentrated in the coastal areas in the south-western and western parts of the country and although it is one of the important economic development factors in these regions, many problems accompany today's structure of tourism in Turkey which is far from being sustainable (Seckelmann 2002). Concentration of tourism in the south and south-west of the country has been limiting the Turkish tourism product as well as the distribution of benefits. Therefore, there is a need for carefully planned and monitored diversification of the tourism products in order to attract different markets interested in different forms of tourism in different regions. In this way, as well as resources could be utilised more efficiently, benefits of tourism could also be delivered to people who live in or around those regions.

Marketing and promotion activities should be intensified on different products, such as health and spa tourism, which are distributed evenly throughout Turkey and attract people from all around the world. Incentives such as financial help, tax reduction and cheap land allocation could encourage investors in hospitality and tour operator industry to invest in less-developed regions and promote and market different tourism types and products spread across the country. The coastal areas have indicated great development trend in worldwide as have happened in Turkey. However, although Turkey has great potential for natural and culture-based tourism which are described as the future trends of tourism, the major problem for Turkey is the inability to utilize this great potential and resources effectively and being still under influence of coastal tourism development (World Travel and Tourism Council 2002).

Quality in supply and demand (visitors) should be the most important tourism policy to be followed, not quantity. Countries, tourist markets, visitors segments to be targeted should carefully be identified and attracted to Turkey by appropriate marketing and promotion techniques. On the other hand, quality of the attractions and facilities should be suitable to these targeted segments' expectations.

If £10 billion overseas tourism receipts is anticipated, this can be managed either attracting fewer but quality and higher income visitors or more in quantity but visitors in lower income groups. If quality markets are targeted, the destination country will gain direct or indirect benefits. While the higher tourism receipts, entrance of foreign currency to the country and high expenditures by visitors in the destinations can be direct gains, indirect gains will be lesser investment on infra- and supra-structure and better and quality image of the destination. In addition, fewer quality visitors will lead to a decrease in traffic congestion, pollution and health problems. Visitor and locals will be more satisfied from the benefits of tourism. Net profit will probably be higher with low volume and high income visitors compared with a high volume/low income visitor flow.

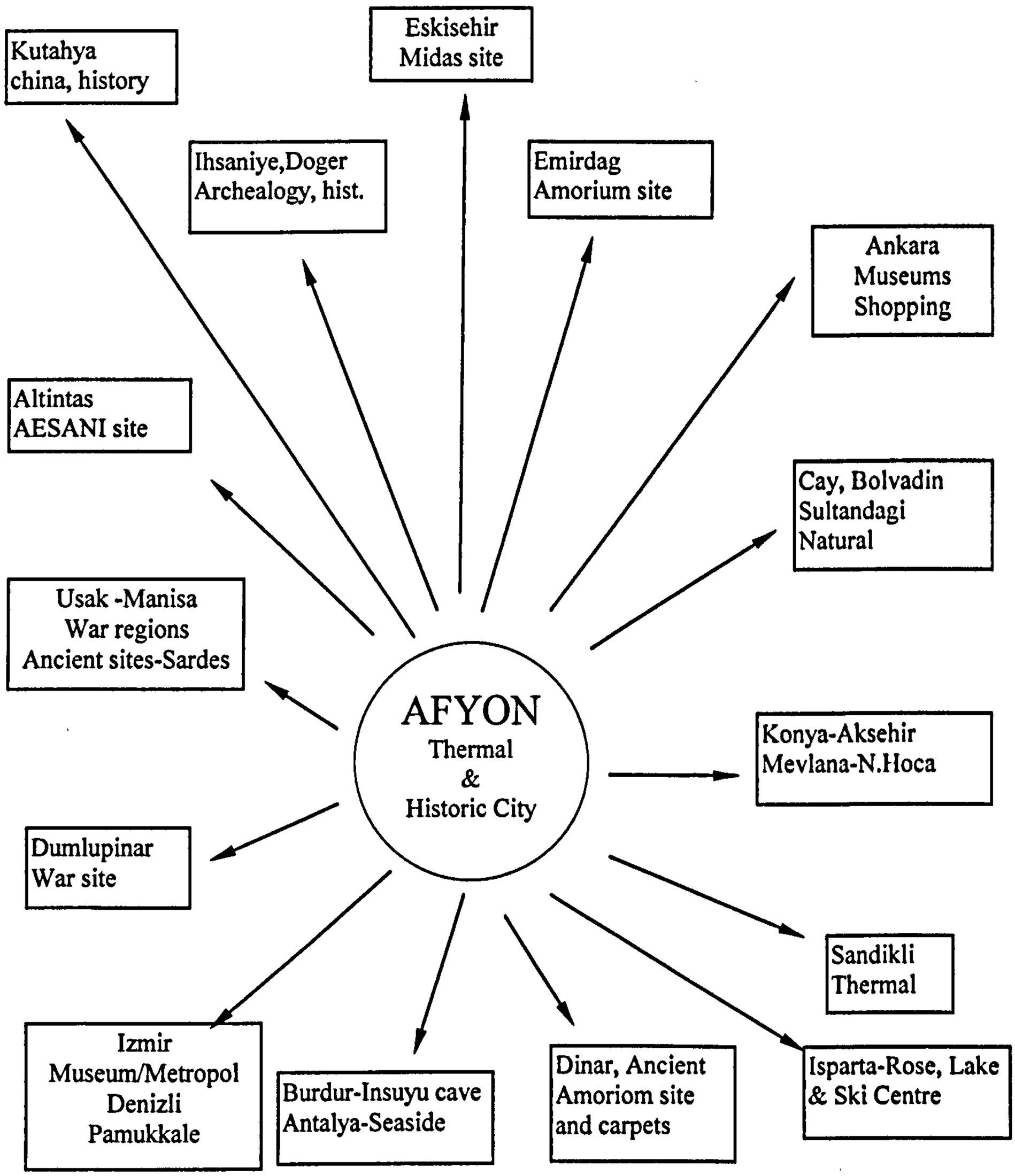
HIGH INCOME CUSTOMERS	LOW INCOME VISITORS
Leave £500 per customer	Leave £250 per customer
Ten million visitors	Twenty million visitors
Total overseas tourism receipts: £5 billions	Total overseas tourism receipts: £5billions
The bed capacity needed for 10m visitors	The bed capacity needed for 20m visitors
The staff needed for 10m visitors	The staff needed for 20m visitors
Other investment costs-lower	Other investment costs-higher
Infrastructure cost for 10 million visitors	Infrastructure cost for 20 million visitors
.....	.....

Off-peak tourism should be promoted, instead of any more development in popular and over-developed areas in order to benefit from demand in peak-season as much as possible, and protection measures and development restrictions should be introduced immediately against further deterioration of resources in short- and long-term. Inner regions of Anatolia are also suitable for most kinds of off-season tourism activities, such as skiing.

The model illustrated on Figure 6.1 can be adapted in the less developed inner regions. As a thermal/spa/hot water spring resort Afyon could be base for accommodation and spa treatment centre and day trips, excursions or one-night-stay visits to other cities and other locations can be arranged. In this way, visitors' stay in Afyon could be made more colourful, enjoyable and memorable. This model could be applied to many other cities which might act as a regional base for accommodation facilities and tourism attractions around it. Cooperation between the Governors, Municipalities, Tourism Directorates of provinces is essential in this model's succession. In a 2-hour trip visitors will have an opportunity to see many other attractions as well as their health treatment in Afyon. Aslantas (2002) proposes that Turkey as a tourism product

should place itself in global tourism markets as a 'multi-holiday' tourism destination by utilising its current and potentially available tourism products.

Figure 6.1 The model for central destination development



As a consequence, one must be sure that the world will continue to witness great and improved development trend in Turkish tourism. However, healthy, continuous, stable and steady development depends mostly on below factors.

a) Financial incentives provided for foreign and Turkish investors
b) Completion of infra-structure by local and central authorities
c) Eased bureaucratic procedures for investment applications and during operations
d) Effective promotion and marketing activities
e) Improving the quality of tourism education and awareness of Turkish people
f) Identification of market profiles for successful promotion and marketing
g) Developing the potential such as natural and cultural in a planned and sustainable manner
h) Development of new and diversified tourism products through the country and year-round
i) Cooperation between central and local authorities in planning and product development
j) Collaboration between private and public sector

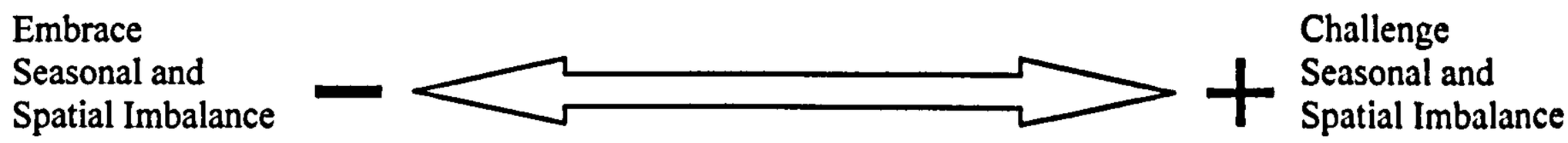
Beriatos and Elias (2002) propose that spreading tourism activities towards interior areas, out of at least one kilometre away from waterfront would increase the carrying capacity of the regions and reduce pressures on the coastal zone throughout critical seasonal peaks. In addition, abandoning the "triple S" (sea-sun-sand) tourist model as far as possible and promoting the unexplored hinterland of tourist resorts in an environmentally friendly and responsible manner provides unique opportunities to spread tourism activities in time and space. As Martin Cullen (2002), the Minister for the Environment and Local Government of Ireland, stressed in his speech at the presentation of National Spatial Strategy proposals, the fact that some regions have not benefited as well as others from the enormous economic and social strides taken in the recent year's demands attention. If this is to change, policies must change. A National Spatial Strategy should deliver a more balanced regional development. The need for greater diversity in tourism products and markets has led to a realignment of Portugal's promotional strategy, aimed at overcoming seasonality, excessive concentration in too few destinations and over dependence on a limited number of markets (ICEP Portugal). Therefore, these statements are universal and apply to regional and seasonal imbalance in Turkey and more careful and responsible policies and strategies should be introduced.

The interviews with 18 hotel managers and 4 Provincial Tourism Directors indicated that first of all, none of them was actually aware of seasonal and spatial problems. First, they are not in search of finding a way to improve their businesses all-year-round. Secondly, apart from a few four and five-star hotels, others did not have marketing department and any marketing activities, and a few hotels have press and public relations departments and activities. Thirdly, the acceptance of an imbalance in tourism activities in time and space is reflected in a lack of dialogue and co-operation between the private and public sector. Therefore, to break these negative thoughts and practices and overcome spatial and seasonal imbalance co-operation models must be introduced. As Akat (1997) states, '*models should be developed to be successful in tourism business*'. Otherwise, several different, unplanned and unorganised development activities hamper achievement of the goals. The demand for Turkish Tourism, tourism resources, aims and the tools for the development

goals. The demand for Turkish Tourism, tourism resources, aims and the tools for the development should carefully be evaluated when a tourism model is developed (Akat 1997). In this respect the model illustrated on Figure 5.3 can be practised for balanced tourism development.

'*Undoubtedly, marketing decisions and strategic planning of tourism provisions require knowledge of factors affecting destination choice and type of trips and forecast of tourism flows in the short and long term*' (Seddighi and Theocharous 2002, p.475). Imbalances, although it is very difficult to implement, may be managed by either managing the supply for a fixed demand, or managing the demand for a fixed supply (Adenso-Diaz and et al. 2002). '*Tourism managers are thus required to consider alternative strategies to facilitate the efficient management of both demand and capacity (supply) of services. Excess capacity or low demand will not only impair the firm's profit, but will also affect the quality of service experienced by tourists*' (Kandampully, 2000, p.12). As Basu (2000) advocates, assessing the resource base of the country and drawing up an effective development strategy based primarily on efficiency criteria, leaving aside political and group interests for the time being is essential.

Therefore, all efforts by should concentrate on the managing tourism supply and demand by utilising various means such as detailed up-to-date and contemporary research, identification of tourism resources, affective marketing and promotion policies and strategies, investment and development incentives. As Bunja (2003) proposes, additional investment in entertainment facilities and equipment will help to prolong the tourist season is of great significance while building smaller hotel facilities that are adaptable to the requirements of individual tourists. Jolliffe and Farnsworth (2003) distinguish the parties involved in tourism as '*embracers*' and '*challengers of temporal problems*' terms which can be applied equally to spatial problems. They state that '*embracers of would be businesses that by choice or circumstance accept the nature of their industry. Challengers, on the other hand, would be tourism operators who would prefer the more even-paced nature of a business*' (p.314).



The Turkish tourism industry should be on the positive side which aims to challenge temporal and spatial imbalance to provide its people and the tourism industry much brighter future. It is obvious that tourism industry occupies an important place in the Turkish economy. The study recognises that balancing temporal and spatial imbalance is not an easy task and requires significant amount of infra- and supra-structure investment capital in under-developed regions and marketing and promotion budget which allows reaching out and attracting potential visitors to particularly inner

regions in off-season. Marketers of Turkey abroad, foreign-based tour operators, make challenging this imbalance difficult as they obviously prefer more popular and profitable destinations and times there is already adequate demand. Security problems, although relatively limited at present, deter both visitors and investors from areas such as East and South East Anatolia. The supply-side of the industry, on the other hand, needs to be controlled to overcome concentration of facilities in certain regions and excess capacity during off-season.

Despite all difficulties, as the surveys and statistical market analysis indicate, there is a demand for off-season tourism and tourism in the underdeveloped inner regions of Turkey. If necessary actions are taken by all parties involved, Turkish tourism may develop an improved and more evenly balanced tourism in time and space. Diversifying tourism products which are very strong against competition such as cultural, natural and thermal tourism and development of tourism in regions where specific and peculiar tourism products can easily be offered will provide great opportunities to visitors, locals, investors and officials of the industry. From a marketing viewpoint, the challenge Turkey faces is being able to respond effectively to enquiries from each market segment whilst being proactive in seeking to increase its share from those markets which bring greatest benefit. In this case, joint marketing should be a key concept of all aspects of Turkey's marketing. As Aguas and et al. (2000, p.394) stress, '*it is necessary to identify market segments and decide which are the most attractive for each tourist product, and then to define the way in which each of these segments is to be approached, as it relates to the marketing mix*'. The products which respond to markets very well and provide the greatest value for money and time will determine the level of success in today's conditions (Ulusoy, 2002).

APPENDICES

Appendix 1. Foreign visitor arrivals to Ministry registered accommodation establishments by region

	Foreign visitor arrivals to Ministry registered accommodation establishments by region									
	1981		1987		1990		1993		2003	
Rank	Region	%	Region	%	Region	%	Region	%	Region	%
1	Marmara	57.03	Marmara	40.20	Marmara	38.08	Marmara	40.89	Marmara	22.6
2	C.Anatolia	19.10	Aegean	23.53	Aegean	22.77	Aegean	24.19	Aegean	24.8
3	Aegean	12.63	C.Anatolia	15.63	Mediterran.	20.07	Mediterran.	20.22	Mediterran	45.9
4	Mediterran.	7.45	Mediterran.	13.44	C.Anatolia	11.77	C.Anatolia	11.14	C.Anatolia	5.3
5	Black Sea	1.60	E. Anatolia	2.83	Black Sea	3.24	Black Sea	2.66	Black Sea	0.8
6	E. Anatolia	1.59	Black Sea	2.78	E. Anatolia	2.41	E. Anatolia	0.47	E.Anatolia	0.4
7	SE.Anatoli	0.58	SE.Anatoli	1.59	SE.Anatoli	1.65	SE.Anatoli	0.43	S.E.Anatoli	0.3
Turkey	618849		2552698		3869166		4097358		8991456	
	Coastal	75.8	Coastal	73.37	Coastal	78.20	Coastal	80.26	Coastal	88.4
	Inner provi.	24.2	Inner provi.	26.63	Inner provi.	21.80	Inner provi.	19.74	Inner provi.	11.6
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 2. Number of nights spent by foreign visitors by region

	Number of nights spent by foreign visitors in Ministry reg'd accomm. establishments by region									
	1981		1987		1990		1993		2003	
Rank	Region	%	Region	%	Region	%	Region	%	Region	%
1	Marmara	60.25	Marmara	34.70	Mediterran.	39.27	Mediterran.	39.19	Mediterran	59.5
2	Aegean	15.21	Aegean	27.24	Marmara	27.28	Aegean	29.74	Aegean	25.2
3	C.Anatolia	14.08	Mediterran.	25.83	Aegean	24.74	Marmara	24.63	Marmara	12.3
4	Mediterran.	8.27	C.Anatolia	8.93	C.Anatolia	6.06	C.Anatolia	5.28	C.Anatolia	2.4
5	Black Sea	1.07	E.Anatolia	1.29	Black Sea	1.12	Black Sea	0.79	Black Sea	0.3
6	E.Anatolia	0.81	Black Sea	1.21	E.Anatolia	0.89	E.Anatolia	0.18	E.Anatolia	0.2
7	SE.Anatoli	0.30	SE.Anatoli	0.81	SE.Anatoli	0.64	SE.Anatoli	0.18	S.E.Anatoli	0.1
Turkey	1567673		8049679		13270641		17064115		40866002	
	Coastal	83.3	Coastal	86.58	Coastal	90.45	Coastal	92.34	Coastal	95.8
	Inner provi.	16.7	Inner provi.	13.42	Inner provi.	9.55	Inner provi.	7.66	Inner provi.	4.2
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 3. Foreign average length of stay by region

	Foreign average length of stay (ALS) in Ministry reg'd accomm. establishments by region									
	1981		1987		1990		1993		2003	
Rank	Region		Region		Region		Region		Region	
1	Aegean	3.05	C.Anatolia	6.06	Mediterran.	6.71	Mediterran.	8.07	Mediterran	5.9
2	Mediterran.	2.81	Aegean	3.65	Aegean	3.73	Aegean	5.12	Aegean	4.6
3	Marmara	2.68	Marmara	2.72	Marmara	2.46	Marmara	2.51	Marmara	2.5
4	C.Anatolia	1.87	Mediterran.	1.80	C.Anatolia	1.77	C.Anatolia	1.98	S.E.Anatoli	2.2
5	Black Sea	1.70	SE.Anatoli	1.60	SE.Anatoli	1.33	SE.Anatoli	1.73	E.Anatolia	2.1
6	SE.Anatoli	1.31	Black Sea	1.43	E.Anatolia	1.26	E.Anatolia	1.59	C.Anatolia	2.1
7	E.Anatolia	1.29	E.Anatolia	1.37	Black Sea	1.19	Black Sea	1.24	Black Sea	1.5
Turkey		2.53		3.15		3.43		4.16		4.5
	Coastal	2.78	Coastal	3.72	Coastal	3.97	Coastal	4.79	Coastal	4.9
	Inner provi.	1.75	Inner provi.	1.59	Inner provi.	1.50	Inner provi.	1.62	Inner provi.	1.6
Turkey		2.53		3.15		3.43		4.16		4.5
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 4 Foreign visitor arrivals to Ministry registered accommodation establishments by province

	Foreign visitors arrivals to Ministry registered accommodation establishments by province									
	1981		1987		1990		1993		2003	
Rank	Province	%	Province	%	Province	%	Province	%	Province	%
1	Istanbul	47.18	Istanbul	28.96	Istanbul	27.74	Istanbul	32.60	Antalya	45.1
2	Ankara	9.00	Antalya	9.87	Antalya	16.65	Antalya	18.29	Istanbul	20.0
3	Izmir	6.17	Izmir	9.72	Aydin	8.21	Mugla	7.79	Mugla	10.7
4	Nevsehir	4.52	Aydin	6.00	Izmir	7.15	Aydin	5.70	Denızlı	4.9
5	Bursa	3.86	Ankara	5.90	Ankara	5.51	Izmir	5.70	Aydın	4.8
6	Aydin	3.59	Nevsehir	5.23	Bursa	4.96	Ankara	4.84	Izmır	4.2
7	Antalya	2.82	Bursa	4.93	Mugla	4.89	Denizli	4.81	Nevsehır	2.4
8	Balikesir	2.57	Mugla	3.97	Nevsehir	3.38	Nevsehir	4.54	Ankara	2.3
9	Konya	2.46	Denizli	3.55	Balikesir	2.41	Bursa	4.38	Bursa	1.1
10	Nigde	2.33	Balikesir	3.15	Denizli	2.33	Bolu	1.87	Canakkale	0.9
Turkey	618849		2552698		3869166		4097358		8991456	
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 5 Number of nights spent by foreign visitors by province

	Nights spent by foreign visitors in Ministry registered accommodation by province									
	1981		1987		1990		1993		2003	
Rank	Province	%	Province	%	Province	%	Province	%	Province	%
1	Istanbul	54.27	Istanbul	27.62	Antalya	37.72	Antalya	38.26	Antalya	59.1
2	Izmir	8.15	Antalya	24.05	Istanbul	19.98	Istanbul	21.01	Mugla	15.3
3	Ankara	7.97	Aydin	9.17	Mugla	9.61	Mugla	15.93	Istanbul	11.2
4	Antalya	4.47	Izmir	8.49	Aydin	8.97	Aydin	7.95	Aydın	5.1
5	Aydin	3.95	Mugla	8.24	Izmir	5.31	Izmir	4.60	Izmır	3.6
6	Nevsehir	3.32	Ankara	3.77	Balikesir	4.41	Ankara	2.49	Ankara	1.3
7	Bursa	2.28	Balikesir	3.55	Ankara	3.04	Nevsehir	2.24	Denızlı	1.2
8	Mugla	2.20	Nevsehir	3.29	Nevsehir	2.02	Bursa	1.51	Nevsehır	1.0
9	Balikesir	1.79	Bursa	2.19	Bursa	1.80	Balikesir	1.32	Bursa	0.5
10	Adana	1.77	Denizli	1.18	Denizli	0.78	Denizli	1.20	Canakkale	0.2
Turkey	1567673		8049679		13270641		17064115		40866002	
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 6 Average foreign length of stay (ALS) by province

	Average foreign length of stay in Ministry registered accommodation by province									
	1981		1987		1990		1993		2003	
Rank	Province		Province		Province		Province		Province	
1	Artvin	6.44	Antalya	7.68	Antalya	7.77	Antalya	8.71	Nıgde	13.5
2	Ordu	6.01	Mugla	6.54	Mugla	6.74	Mugla	8.51	Mugla	6.5
3	Mugla	4.48	Aydin	4.82	Balikesir	6.27	Bilecik	6.92	Antalya	6.0
4	Antalya	4.02	Bilecik	4.65	Cankiri	5.02	Aydin	5.80	Trabzon	5.3
5	Bilecik	3.46	Sinop	4.54	Aydin	3.75	Eskisehir	4.79	Aydın	4.8
6	Izmir	3.34	Kirklareli	4.49	Sinop	3.70	Kocaeli	4.00	Kırklarelı	4.4
7	Kocaeli	3.17	Balikesir	3.55	Eskisehir	3.08	Nigde	3.92	Bılecık	4.2
8	Erzincan	3.14	Istanbul	3.01	Kocaeli	2.84	Manisa	3.73	Kocaelı	4.1
9	Kirklareli	3.10	Kocaeli	3.00	Izmir	2.55	Gaziantep	3.63	Manısa	4.1
10	Istanbul	2.91	Sakarya	2.90	Istanbul	2.47	Balikesir	3.59	Yozgat	3.9
Turkey		2.53		3.15		3.43		4.16		4.5
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 7 Turkish visitor arrivals to Ministry registered accommodation establishments by region

	Turkish visitor arrivals to Ministry registered accommodation establishments by region									
	1981		1987		1990		1993		2003	
Rank	Region	%	Region	%	Region	%	Region	%	Region	%
1	Marmara	37.66	Marmara	34.49	Marmara	32.42	Marmara	31.29	Marmara	25.1
2	C.Anatolia	20.56	Mediterran.	19.90	C.Anatolia	20.36	Aegean	20.14	Aegean	22.3
3	Aegean	16.28	Aegean	16.62	Aegean	18.51	C.Anatolia	17.25	Mediterran	17.5
4	Mediterran.	12.81	C.Anatolia	10.92	Mediterran.	12.75	Mediterran.	16.24	C.Anatolia	17.1
5	Black Sea	6.21	E.Anatolia	8.88	Black Sea	8.64	Black Sea	8.54	Black Sea	9.4
6	E.Anatolia	4.01	Black Sea	5.34	E.Anatolia	4.01	E.Anatolia	3.31	E.Anatolia	4.1
7	SE.Anatoli	2.47	SE.Anatoli	3.86	SE.Anatoli	3.32	SE.Anatoli	3.23	S.E.Anatoli	4.5
Turkey	1939200		2880604		3584287		4831051		8429868	
	Coastal	63.0	Coastal	58.84	Coastal	60.04	Coastal	64.92	Coastal	61.9
	Inner provi.	37.0	Inner provi.	41.16	Inner provi.	39.96	Inner provi.	35.08	Inner provi.	38.1
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 8 Number of nights spent by Turkish visitors by region

	Number of nights spent by Turkish visitors in Ministry reg'd accomm. establishments by region									
	1981		1987		1990		1993		2003	
Rank	Region	%	Region	%	Region	%	Region	%	Region	%
1	Marmara	38.38	Marmara	35.84	Marmara	32.82	Marmara	29.04	Mediterran	24.3
2	Aegean	20.71	Mediterran.	18.20	Aegean	20.77	Mediterran.	22.54	Aegean	24.1
3	C.Anatolia	17.16	Aegean	18.12	C.Anatolia	17.71	Aegean	22.23	Marmara	24.1
4	Mediterran.	12.42	C.Anatolia	12.75	Mediterran.	16.04	C.Anatolia	14.94	C.Anatolia	13.8
5	Black Sea	5.94	E.Anatolia	7.76	Black Sea	7.31	Black Sea	6.36	Black Sea	7.4
6	E.Anatolia	3.75	Black Sea	4.37	E.Anatolia	3.02	E.Anatolia	2.49	S.E.Anatoli	3.3
7	SE.Anatoli	1.64	SE.Anatoli	2.96	SE.Anatoli	2.31	SE.Anatoli	2.40	E.Anatolia	3.0
Turkey	3435951		5314364		6878368		9696873		16233902	
	Coastal	69.1	Coastal	64.38	Coastal	66.81	Coastal	71.39	Coastal	70.1
	Inner provi.	30.9	Inner provi.	35.62	Inner provi.	33.19	Inner provi.	28.61	Inner provi.	29.9
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 9 Average Turkish length of stay (ALS) by province

	Turkish average length of stay (ALS) in Ministry reg'd accomm. establishments by region									
	1981		1987		1990		1993		2003	
Rank	Region		Region		Region		Region		Region	
1	Aegean	2.25	C.Anatolia	2.15	Mediterran.	1.96	Mediterran.	2.79	Mediterran	2.7
2	Marmara	1.81	Aegean	2.01	Aegean	1.09	Aegean	2.22	Aegean	2.1
3	Mediterran.	1.72	Marmara	1.92	Marmara	0.72	Marmara	1.86	Marmara	1.9
4	Black Sea	1.70	Mediterran.	1.69	C.Anatolia	0.51	C.Anatolia	1.74	C.Anatolia	1.6
5	E.Anatolia	1.66	E.Anatolia	1.61	SE.Anatoli	0.39	E.Anatolia	1.51	Black Sea	1.5
6	C.Anatolia	1.48	Black Sea	1.51	E.Anatolia	0.37	Black Sea	1.49	S.E.Anatoli	1.4
7	SE.Anatoli	1.18	SE.Anatoli	1.41	Black Sea	0.35	SE.Anatoli	1.49	E.Anatolia	1.4
Turkey		1.77		1.84		1.00		2.01		1.9
	Coastal	1.95	Coastal	2.02	Coastal	1.16	Coastal	2.21	Coastal	2.2
	Inner provi.	1.48	Inner provi.	1.60	Inner provi.	0.44	Inner provi.	1.64	Inner provi.	1.5
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 10 Turkish visitor arrivals to Ministry registered accommodation establishments by province

	Turkish visitors arrivals to Ministry registered accommodation establishments by province									
	1981		1987		1990		1993		2003	
Rank	Province	%	Province	%	Province	%	Province	%	Province	%
1	Istanbul	19.30	Istanbul	17.68	Istanbul	15.45	Istanbul	15.73	Istanbul	14.9
2	Ankara	13.05	Ankara	12.95	Ankara	14.39	Ankara	11.32	Antalya	12.1
3	Bursa	8.44	Izmir	7.89	Izmir	7.35	Izmir	7.86	Ankara	10.3
4	Izmir	7.38	Bursa	6.33	Bursa	6.92	Antalya	7.67	Izmır	7.4
5	Icel	4.67	Balikesir	4.21	Antalya	5.26	Bursa	6.64	Mugla	6.6
6	Balikesir	3.88	Adana	3.88	Balikesir	3.67	Mugla	4.90	Bursa	3.4
7	Adana	3.13	Antalya	3.26	Mugla	3.54	Icel	3.63	Balıkesır	2.7
8	Antalya	2.76	Mugla	2.40	Bolu	2.80	Balikesir	3.14	Aydın	2.5
9	Mugla	2.70	Icel	2.34	Adana	2.79	Aydin	2.77	Denızlı	2.5
10	Konya	2.56	Edirne	2.26	Aydin	2.71	Adana	2.65	Bolu	2.3
Turkey	1939200		2880604		3584287		4831051		8429868	

Appendix 11. Number of nights spent by Turkish visitors by province

	Nights spent by Turkish visitors in Ministry registered accommodation by province									
	1981		1987		1990		1993		2003	
Rank	Province	%	Province	%	Province	%	Province	%	Province	%
1	Istanbul	19.54	Istanbul	18.03	Istanbul	14.88	Istanbul	15.94	Antalya	19.7
2	Ankara	11.73	Ankara	12.78	Ankara	13.01	Antalya	15.33	Istanbul	14.3
3	Bursa	8.54	Izmir	8.15	Antalya	8.97	Ankara	10.05	Mugla	8.7
4	Izmir	8.37	Bursa	7.15	Izmir	7.82	Izmir	8.30	Ankara	8.4
5	Mugla	5.79	Antalya	5.80	Bursa	6.80	Mugla	7.25	Izmır	7.4
6	Balikesir	5.40	Balikesir	5.67	Balikesir	6.15	Bursa	5.30	Balıkesır	3.3
7	Icel	4.47	Mugla	4.14	Mugla	5.98	Balikesir	3.42	Aydın	3.2
8	Antalya	3.72	Adana	3.19	Aydin	2.86	Icel	3.15	Bursa	3.2
9	Adana	2.62	Icel	2.54	Bolu	2.70	Aydin	3.13	Denızlı	2.0
10	Aydin	2.40	Bolu	2.23	Icel	2.62	Adana	2.10	Nevsehır	2.0
Turkey	3435951		5314364		6878368		9696873		16233902	

Appendix 12. Average Turkish length of stay (ALS) by province

	Average Turkish length of stay in Ministry registered accommodation by province									
	1981		1987		1990		1993		2003	
Rank	Province		Province		Province		Province		Province	
1	Giresun	9.03	Antalya	3.28	Antalya	3.27	Antalya	4.01	Kırsehır	4.5
2	Mugla	3.81	Mugla	3.18	Mugla	3.25	Mugla	2.97	Antalya	3.1
3	Bilecik	3.59	Balikesir	2.48	Balikesir	3.21	Nigde	2.81	Kırklarelı	3.0
4	Aydin	3.42	Kutahya	2.41	Kirikkale	3.15	Tunceli	2.73	Mugla	2.6
5	Kutahya	2.49	Aydin	2.31	Nigde	2.56	Bilecik	2.70	Aydın	2.5
6	Balikesir	2.46	Tekirdag	2.19	Tekirdag	2.33	Aydin	2.27	Balıkesır	2.3
7	Antalya	2.39	Bursa	2.08	Usak	2.14	Balikesir	2.19	Kastamonu	2.3
8	Erzurum	2.31	Icel	2.01	Kutahya	2.08	Izmir	2.12	Sıvas	2.2
9	Malatya	2.09	Bolu	1.94	Izmir	2.04	Mardin	2.06	Trabzon	2.1
10	Izmir	2.01	Izmir	1.91	Icel	2.03	Istanbul	2.03	Sakarya	2.1
Turkey		1.77		1.84		1.92		2.01		1.9

Appendix 13. Overall visitor arrivals to Ministry registered accommodation establishments by region

	Overall visitor arrivals to Ministry registered accommodation establishments by region									
	1981		1987		1990		1993		2003	
Rank	Region	%	Region	%	Region	%	Region	%	Region	%
1	Marmara	42.35	Marmara	37.17	Marmara	35.36	Marmara	35.70	Mediterran	32.2
2	C.Anatolia	20.21	Aegean	19.87	Aegean	20.72	Aegean	22.00	Marmara	23.8
3	Aegean	15.40	Mediterran.	17.89	Mediterran.	16.55	Mediterran.	18.07	Aegean	23.6
4	Mediterran.	11.52	C.Anatolia	12.10	C.Anatolia	15.90	C.Anatolia	14.45	C.Anatolia	11.0
5	Black Sea	5.10	E.Anatolia	6.01	Black Sea	5.84	Black Sea	5.85	Black Sea	4.9
6	E.Anatolia	3.43	Black Sea	4.16	E.Anatolia	3.18	E.Anatolia	2.01	S.E.Anatoli	2.3
7	SE.Anatoli	2.01	SE.Anatoli	2.79	SE.Anatoli	2.45	SE.Anatoli	1.94	E.Anatolia	2.2
Turkey	2558049		5433302		7453453		8928409		17421324	
	Coastal	66.1	Coastal	65.67	Coastal	69.47	Coastal	71.96	Coastal	75.6
	Inner provi.	33.9	Inner provi.	34.33	Inner provi.	30.53	Inner provi.	28.04	Inner provi.	24.4
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 14. Number of nights spent by overall visitors by region

	Number of nights spent by overall visitors in Ministry reg'd accomm. establishments by region									
	1981		1987		1990		1993		2003	
Rank	Region	%	Region	%	Region	%	Region	%	Region	%
1	Marmara	45.23	Marmara	35.15	Mediterran.	31.34	Mediterran.	33.16	Mediterran.	49.5
2	Aegean	18.99	Aegean	23.61	Marmara	29.17	Aegean	27.02	Aegean	24.9
3	C.Anatolia	16.19	C.Anatolia	20.63	Aegean	23.39	Marmara	26.23	Marmara	15.6
4	Mediterran.	11.12	Mediterran.	12.62	C.Anatolia	10.04	C.Anatolia	8.78	C.Anatolia	5.7
5	Black Sea	4.42	E.Anatolia	3.81	Black Sea	3.24	Black Sea	2.81	Black Sea	2.3
6	E.Anatolia	2.83	Black Sea	2.51	E.Anatolia	1.62	E.Anatolia	1.02	S.E.Anatoli	1.1
7	SE.Anatoli	1.22	SE.Anatoli	1.66	SE.Anatoli	1.21	SE.Anatoli	0.98	E.Anatolia	1.0
Turkey	5003624		13364043		20149009		26760988		57099904	
	Coastal	73.6	Coastal	77.75	Coastal	82.38	Coastal	84.75	Coastal	88.5
	Inner provi.	26.4	Inner provi.	22.25	Inner provi.	17.62	Inner provi.	15.25	Inner provi.	11.5
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 15. Overall visitors' average length of stay by region

	Overall visitors' average length of stay (ALS) in Ministry reg'd accomm. by region									
	1981		1987		1990		1993		2003	
Rank	Region		Region		Region		Region		Region	
1	Aegean	2.41	C.Anatolia	4.19	Mediterran.	2.41	Mediterran.	5.50	Mediterran	5.0
2	Marmara	2.09	Aegean	2.92	Aegean	2.15	Aegean	3.68	Aegean	3.5
3	Mediterran.	1.89	Marmara	2.33	Marmara	1.94	Marmara	2.20	Marmara	2.2
4	Black Sea	1.70	Mediterran.	1.73	C.Anatolia	1.67	C.Anatolia	1.82	C.Anatolia	1.7
5	E.Anatolia	1.62	E.Anatolia	1.56	Black Sea	1.62	E.Anatolia	1.52	E. Anatolia	1.5
6	C.Anatolia	1.57	Black Sea	1.49	E.Anatolia	1.45	SE.Anatoli	1.51	Black Sea	1.5
7	SE.Anatoli	1.18	SE.Anatoli	1.46	SE.Anatoli	1.34	Black Sea	1.44	SE.Anatoli	1.4
Turkey		1.96		2.46		1.92		3.00		3.33
	Coastal	2.18	Coastal	2.91	Coastal	2.14	Coastal	3.53	Coastal	3.8
	Inner provi.	1.52	Inner provi.	1.59	Inner provi.	1.59	Inner provi.	1.63	Inner provi.	1.5
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 16. Overall visitor arrivals to Ministry registered accommodation establishments by province

	Overall visitors arrivals to Ministry registered accommodation establishments by province									
	1981		1987		1990		1993		2003	
Rank	Province	%	Province	%	Province	%	Province	%	Province	%
1	Istanbul	26.04	Istanbul	22.98	Istanbul	21.83	Istanbul	23.47	Antalya	29.1
2	Ankara	12.07	Ankara	9.64	Antalya	11.17	Antalya	12.55	Istanbul	17.5
3	Bursa	7.33	Izmir	8.75	Ankara	9.78	Ankara	8.34	Mugla	8.7
4	Izmir	7.09	Antalya	6.37	Izmir	7.25	Izmir	6.87	Ankara	6.2
5	Icel	3.74	Bursa	5.68	Bursa	5.90	Mugla	6.22	Izmir	5.8
6	Balikesir	3.57	Balikesir	3.71	Aydin	5.56	Bursa	5.60	Denizli	3.7
7	Adana	2.86	Aydin	3.37	Mugla	4.24	Aydin	4.12	Aydın	3.7
8	Antalya	2.78	Mugla	3.14	Balikesir	3.02	Denizli	3.13	Nevsehir	2.3
9	Konya	2.54	Nevsehir	2.81	Bolu	2.33	Nevsehir	2.87	Bursa	2.2
10	Mugla	2.34	Denizli	2.57	Nevsehir	2.23	Balikesir	2.40	Balikesir	1.5
Turkey	2558049		5433302		7453453		8928409		17421324	
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 17. Number of nights spent by overall visitors by province

	Nights spent by overall visitors in Ministry registered accommodation by province									
	1981		1987		1990		1993		2003	
Rank	Province	%	Province	%	Province	%	Province	%	Province	%
1	Istanbul	30.42	Istanbul	23.81	Antalya	27.91	Antalya	29.95	Antalya	47.9
2	Ankara	10.55	Antalya	16.79	Istanbul	18.24	Istanbul	19.17	Mugla	13.5
3	Izmir	8.30	Izmir	8.35	Mugla	8.37	Mugla	12.78	Istanbul	12.1
4	Bursa	6.58	Ankara	7.35	Aydin	6.88	Aydin	6.20	Izmir	4.7
5	Mugla	4.67	Mugla	6.61	Ankara	6.44	Izmir	5.94	Aydın	4.6
6	Balikesir	4.27	Aydin	6.04	Izmir	6.16	Ankara	5.23	Ankara	3.3
7	Antalya	3.96	Balikesir	4.40	Balikesir	5.00	Bursa	2.89	Denizli	1.4
8	Icel	3.31	Bursa	4.16	Bursa	3.50	Balikesir	2.08	Nevsehir	1.3
9	Aydin	2.88	Nevsehir	2.21	Nevsehir	1.65	Nevsehir	1.96	Bursa	1.2
10	Adana	2.35	Adana	1.60	Icel	1.39	Icel	1.38	Balikesir	1.1
Turkey	5003624		13364043		20149009		26760988		57099904	
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 18. Overall visitors' average length of stay (ALS) by province

	Avg. overall visitors' length of stay in Ministry reg'd accommodation by province									
	1981		1987		1990		1993		2003	
Rank	Province		Province		Province		Province		Province	
1	Giresun	7.28	Antalya	6.49	Antalya	6.75	Antalya	7.16	Antalya	5.4
2	Mugla	3.89	Mugla	5.18	Mugla	5.34	Mugla	6.16	Mugla	5.1
3	Bilecik	3.59	Aydin	4.41	Balikesir	4.48	Aydin	4.52	Kirsehir	4.4
4	Aydin	3.12	Balikesir	2.91	Aydin	3.35	Bilecik	2.95	Aydın	4.0
5	Antalya	2.79	Istanbul	2.55	Kirikkale	3.13	Nigde	2.82	Kirklareli	3.1
6	Kutahya	2.49	Kutahya	2.41	Nigde	2.52	Tunceli	2.72	Izmir	2.7
7	Balikesir	2.34	Izmir	2.35	Izmir	2.30	Balikesir	2.60	Balikesir	2.3
8	Izmir	2.29	Sinop	2.30	Tekirdag	2.30	Izmir	2.59	Sivas	2.3
9	Istanbul	2.28	Tekirdag	2.20	Istanbul	2.26	Istanbul	2.45	Kocaeli	2.3
10	Erzurum	2.15	Bilecik	1.96	Usak	2.12	Sakarya	2.08	Istanbul	2.3
Turkey		1.96		2.46		2.70		3.00		3.3
	Source: Bulletin of Accommodation Statistics, 1981-2003, Turkish Ministry of Tourism, Ankara									

Appendix 19. Foreign occupancy rates by region

	Foreign occupancy rates in Ministry reg'd accomm. establishments by region									
	1982		1984		1990		1993		2003	
Rank	Region		Region		Region		Region		Region	
1	Marmara	22.5	Marmara	24.7	Mediterran.	47.3	Mediterran.	40.2	Mediterran.	49.1
2	Aegean	14.2	Mediterran.	21.3	Aegean	32.8	Aegean	32.9	Aegean	34.3
3	Mediterran.	13.7	Aegean	15.5	Marmara	29.2	Marmara	25.9	Marmara	21.0
4	C.Anatolia	13.5	C.Anatolia	15.4	C.Anatolia	16.2	C.Anatolia	14.3	C.Anatolia	10.2
5	SE.Anatoli	6.5	SE.Anatoli	10.2	E.Anatolia	12.0	Black Sea	7.4	E.Anatolia	3.5
6	E.Anatolia	3.8	E.Anatolia	8.2	SE.Anatoli	10.7	SE.Anatoli	3.2	S.E.Anatoli	2.8
7	Black Sea	3.0	Black Sea	6.9	Black Sea	9.0	E.Anatolia	3.2	Black Sea	2.5
	Turkey	15.8	Turkey	19.1	Turkey	31.7	Turkey	29.3	Turkey	33.6
	Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.	
	Source: Bulletin of Accommodation Statistics, 1982-2003, Turkish Ministry of Tourism, Ankara									

Appendix 20. Turkish occupancy rates by region

	Turkish occupancy rates in Ministry reg'd accomm. establishments by region									
	1982		1984		1990		1993		2003	
Rank	Region		Region		Region		Region		Region	
1	Black Sea	34.4	Black Sea	44.5	Black Sea	30.4	Black Sea	33.7	Black Sea	28.1
2	SE.Anatoli	33.6	SE.Anatoli	28.7	C.Anatolia	24.6	E.Anatolia	25.5	S.E.Anatoli	24.8
3	Mediterran.	32.0	E.Anatolia	28.0	E.Anatolia	21.2	SE.Anatoli	24.7	E.Anatolia	23.4
4	E.Anatolia	30.6	C.Anatolia	26.8	SE.Anatoli	20.0	C.Anatolia	23.0	C.Anatolia	23.2
5	Aegean	29.4	Mediterran.	25.8	Marmara	18.2	Marmara	17.3	Marmara	16.4
6	C.Anatolia	29.3	Aegean	20.1	Aegean	14.3	Aegean	14.0	Aegean	12.9
7	Marmara	24.1	Marmara	19.2	Mediterran.	10.0	Mediterran.	13.1	Mediterran.	8.0
	Turkey	28.2	Turkey	22.9	Turkey	16.4	Turkey	16.6	Turkey	13.3
	Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.	
	Source: Bulletin of Accommodation Statistics, 1982-2003, Turkish Ministry of Tourism, Ankara									

Appendix 21. Overall occupancy rates by region

	Overall occupancy rates in Ministry reg'd accomm. establishments by region									
	1982		1984		1990		1993		2003	
Rank	Region		Region		Region		Region		Region	
1	Marmara	46.6	Black Sea	51.4	Mediterran.	57.3	Mediterran.	53.3	Mediterran.	57.1
2	Mediterran.	45.7	Mediterran.	47.1	Marmara	47.4	Aegean	46.9	Aegean	47.2
3	Aegean	43.5	Marmara	43.9	Aegean	47.0	Marmara	43.2	Marmara	37.5
4	C.Anatolia	42.9	C.Anatolia	42.2	C.Anatolia	40.8	Black Sea	41.1	C.Anatolia	33.3
5	SE.Anatoli	40.1	SE.Anatoli	38.9	Black Sea	39.5	C.Anatolia	37.4	Black Sea	30.6
6	Black Sea	37.4	E.Anatolia	36.3	E.Anatolia	33.3	E.Anatolia	28.7	S.E.Anatoli	27.7
7	E.Anatolia	34.4	Aegean	35.5	SE.Anatoli	30.6	SE.Anatoli	27.9	E.Anatolia	26.9
	Turkey	44.0	Turkey	42.0	Turkey	48.2	Turkey	45.9	Turkey	46.9
	Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.		Coastal Inner provi.	
	Source: Bulletin of Accommodation Statistics, 1982-2003, Turkish Ministry of Tourism, Ankara									

Appendix 22. Most visited regions by nationality-Regional choice of visitors in 2000

Rank	First	%	Second	%	Third	%	Fourth	%	Fifth	%	Sixth	%	Seventh	%			%		%
Austria	Mediterrane	84,9	Aegean	10,3	Marmara	3,8	C.Anatolia	0,9	S.E.Anatoli	0,1	Black Sea	0,1	E.Anatolia	0,0		Coastal	99,0	Inner	1,0
Germany	Mediterrane	80,6	Aegean	14,7	Marmara	3,8	C.Anatolia	0,8	S.E.Anatoli	0,1	Black Sea	0,1	E.Anatolia	0,0		Coastal	97,9	Inner	2,1
Benelux	Aegean	54,4	Mediterrane	38,3	Marmara	5,3	C.Anatolia	1,6	Black Sea	0,1	E.Anatolia	0,1	S.E.Anatoli	0,1		Coastal	97,9	Inner	2,1
Scandinavi	Mediterrane	46,8	Aegean	37,4	Marmara	13,8	C.Anatolia	1,5	Black Sea	0,3	E.Anatolia	0,1	S.E.Anatoli	0,1		Coastal	97,6	Inner	2,4
France	Aegean	43,9	Mediterrane	33,6	Marmara	16,1	C.Anatolia	5,8	Black Sea	0,4	E.Anatolia	0,1	S.E.Anatoli	0,1		Coastal	90,6	Inner	9,4
Britain	Aegean	66,5	Mediterrane	21,2	Marmara	10,5	C.Anatolia	1,5	Black Sea	0,2	S.E.Anatoli	0,1	E.Anatolia	0,1		Coastal	97,7	Inner	2,3
Spain	Marmara	75,2	C.Anatolia	13,0	Mediterrane	6,0	Aegean	5,5	Black Sea	0,1	S.E.Anatoli	0,1	E.Anatolia	0,1		Coastal	84,5	Inner	15,5
Switzerland	Mediterrane	79,4	Marmara	14,8	Aegean	4,0	C.Anatolia	1,1	Black Sea	0,3	S.E.Anatoli	0,2	E.Anatolia	0,1		Coastal	98,1	Inner	1,9
Italy	Marmara	41,0	Mediterrane	31,9	Aegean	15,8	C.Anatolia	10,0	Black Sea	0,6	S.E.Anatoli	0,4	E.Anatolia	0,3		Coastal	86,9	Inner	13,1
Greece	Marmara	72,4	Aegean	17,4	C.Anatolia	4,9	Mediterrane	3,4	Black Sea	1,7	E.Anatolia	0,1	S.E.Anatoli	0,1		Coastal	93,7	Inner	6,3
USA	Marmara	48,5	Aegean	18,9	Mediterrane	17,0	C.Anatolia	14,6	Black Sea	0,5	E.Anatolia	0,3	S.E.Anatoli	0,2		Coastal	82,7	Inner	17,3
Australia	Mediterrane	73,2	Aegean	16,4	Marmara	7,2	C.Anatolia	2,5	Black Sea	0,4	E.Anatolia	0,2	S.E.Anatoli	0,1		Coastal	96,6	Inner	3,4
Japan	Marmara	47,4	C.Anatolia	23,1	Aegean	21,6	Mediterrane	5,6	Black Sea	1,4	E.Anatolia	0,5	S.E.Anatoli	0,3		Coastal	65,5	Inner	34,5
Canada	Marmara	55,2	Aegean	15,3	Mediterrane	14,1	C.Anatolia	12,4	Black Sea	1,8	E.Anatolia	0,7	S.E.Anatoli	0,4		Coastal	84,4	Inner	15,6
Bulgaria	Marmara	49,4	Aegean	31,1	Mediterrane	15,4	C.Anatolia	3,6	E.Anatolia	0,3	Black Sea	0,1	S.E.Anatoli	0,1		Coastal	94,6	Inner	5,4
Hungary	Mediterrane	54,8	Marmara	38,7	C.Anatolia	3,0	Aegean	2,9	Black Sea	0,4	E.Anatolia	0,2	S.E.Anatoli	0,0		Coastal	96,0	Inner	4,0
Poland	Mediterrane	83,8	Marmara	7,0	Aegean	6,8	C.Anatolia	2,3	Black Sea	0,0	E.Anatolia	0,0	S.E.Anatoli	0,0		Coastal	93,7	Inner	6,3
Romania	Mediterrane	38,2	Marmara	32,3	Aegean	24,8	C.Anatolia	3,7	Black Sea	0,7	S.E.Anatoli	0,2	E.Anatolia	0,0		Coastal	95,0	Inner	5,0
C.Ind.State	Mediterrane	64,8	Marmara	22,3	C.Anatolia	5,1	Aegean	4,1	Black Sea	3,2	E.Anatolia	0,6	S.E.Anatoli	0,0		Coastal	92,8	Inner	7,2
Yugoslavia	Marmara	52,9	Mediterrane	30,1	Aegean	16,2	C.Anatolia	0,7	Black Sea	0,1	S.E.Anatoli	0,1	E.Anatolia	0,0		Coastal	98,9	Inner	1,1
Iraq	Marmara	31,8	C.Anatolia	23,9	Mediterrane	19,9	Aegean	12,6	S.E.Anatoli	11,6	E.Anatolia	0,2	Black Sea	0,1		Coastal	64,0	Inner	36,0
Kuwait	Marmara	87,1	C.Anatolia	5,9	Mediterrane	4,9	Aegean	1,2	Black Sea	0,7	E.Anatolia	0,1	S.E.Anatoli	0,1		Coastal	93,0	Inner	7,0
Libya	Marmara	96,6	C.Anatolia	1,8	Aegean	1,1	Mediterrane	0,4	S.E.Anatoli	0,1	Black Sea	0,0	E.Anatolia	0,0		Coastal	97,9	Inner	2,1
Lebanon	Marmara	45,5	Aegean	35,8	Mediterrane	15,9	C.Anatolia	1,9	S.E.Anatoli	0,5	E.Anatolia	0,3	Black Sea	0,0		Coastal	94,5	Inner	5,5
Egypt	Marmara	79,8	Mediterrane	10,3	Aegean	5,1	C.Anatolia	4,2	E.Anatolia	0,4	S.E.Anatoli	0,1	Black Sea	0,1		Coastal	95,1	Inner	4,9
Syria	Marmara	45,1	Mediterrane	41,1	S.E.Anatoli	5,3	Aegean	3,8	C.Anatolia	3,7	Black Sea	0,9	E.Anatolia	0,0		Coastal	89,5	Inner	10,5
S.Arabia	Marmara	68,7	Mediterrane	20,6	C.Anatolia	5,7	Aegean	2,9	Black Sea	1,3	S.E.Anatoli	0,7	E.Anatolia	0,0		Coastal	91,8	Inner	8,2
Jordan	Mediterrane	62,6	Marmara	32,6	C.Anatolia	2,0	Aegean	1,7	S.E.Anatoli	0,6	Black Sea	0,5	E.Anatolia	0,0		Coastal	96,9	Inner	3,1
Iran	Marmara	48,5	C.Anatolia	16,8	Aegean	15,5	Mediterrane	9,8	E.Anatolia	8,8	S.E.Anatoli	0,5	Black Sea	0,2		Coastal	73,8	Inner	26,2
Pakistan	Marmara	77,0	C.Anatolia	12,6	Mediterrane	4,9	Aegean	4,8	S.E.Anatoli	0,3	E.Anatolia	0,2	Black Sea	0,2		Coastal	85,7	Inner	14,3
Other	Marmara	34,5	Mediterrane	33,3	Aegean	26,7	C.Anatolia	4,4	Black Sea	0,7	E.Anatolia	0,3	S.E.Anatoli	0,1		Coastal	94,0	Inner	6,0
Tot.Foreign	Mediterrane	56,5	Aegean	23,8	Marmara	15,5	C.Anatolia	3,3	Black Sea	0,6	E.Anatolia	0,2	S.E.Anatoli	0,1		Coastal	95,0	Inner	5,0
Tot.Turkish	Aegean	26,5	Mediterrane	25,2	Marmara	23,1	C.Anatolia	12,7	Black Sea	6,4	S.E.Anatoli	3,1	E.Anatolia	3,0		Coastal	72,1	Inner	27,9
Grand total	Mediterrane	45,1	Aegean	24,8	Marmara	18,3	C.Anatolia	6,7	Black Sea	2,7	E.Anatolia	1,2	S.E.Anatoli	1,2		Coastal	86,6	Inner	13,4

Appendix 23. Most visited provinces by nationality Provincial choice of visitors in 2000

Rank	First	%	Second	%	Third	%	Fourth	%	Fifth	%	Sixth	%	Seventh	%	Eighth	%	Nineth	%	Tenth	%
Austria	Antalya	84,8	Mugla	8,8	Istanbul	3,4	Izmir	0,9	Aydin	0,6	Nevsehir	0,4	Ankara	0,3	Tekirdag	0,1	Eskisehir	0,1	Canakkal	0,1
Germany	Antalya	80,4	Mugla	10,2	Istanbul	3,0	Izmir	2,0	Aydin	1,3	Denizli	1,1	Nevsehir	0,4	Balikesir	0,4	Ankara	0,3	Bursa	0,3
Benelux	Antalya	38,2	Mugla	30,1	Aydin	16,7	Izmir	7,4	Istanbul	4,6	Nevsehir	1,0	Ankara	0,5	Canakkal	0,3	Denizli	0,3	Balikesir	0,3
Scandinavia	Antalya	46,4	Izmir	25,0	Istanbul	12,4	Mugla	11,4	Ankara	1,2	Balikesir	0,7	Denizli	0,5	Aydin	0,5	Canakkal	0,3	Nevsehir	0,2
France	Antalya	33,4	Izmir	18,6	Istanbul	14,5	Aydin	12,8	Mugla	9,5	Nevsehir	3,9	Denizli	3,0	Ankara	1,4	Bursa	0,7	Bolu	0,3
Britain	Mugla	50,0	Antalya	20,8	Aydin	11,0	Istanbul	9,8	Izmir	5,0	Ankara	0,9	Denizli	0,5	Nevsehir	0,4	Canakkal	0,3	Bursa	0,2
Spain	Istanbul	72,5	Nevsehir	9,3	Antalya	5,6	Ankara	3,2	Izmir	2,5	Denizli	2,2	Bursa	1,7	Canakkal	0,6	Aydin	0,6	Konya	0,5
Switzerland	Antalya	79,0	Istanbul	14,3	Izmir	2,1	Aydin	1,3	Ankara	0,9	Mugla	0,5	Adana	0,3	Bursa	0,3	Denizli	0,2	Bolu	0,1
Italy	Istanbul	36,1	Antalya	30,3	Mugla	5,2	Izmir	5,0	Nevsehir	4,5	Ankara	4,1	Aydin	3,6	Bursa	2,8	Denizli	1,7	Konya	1,0
Greece	Istanbul	65,1	Izmir	13,1	Bursa	3,3	Antalya	2,8	Nevsehir	2,5	Aydin	2,3	Balikesir	2,3	Ankara	1,7	Mugla	1,5	Canakkal	0,7
USA	Istanbul	44,9	Antalya	15,4	Ankara	7,3	Aydin	6,8	Nevsehir	5,8	Izmir	5,7	Mugla	4,6	Denizli	1,8	Canakkal	1,7	Bursa	1,5
Australia	Antalya	52,8	Icel	20,2	Mugla	13,8	Canakkal	4,4	Aydin	2,4	Istanbul	2,0	Ankara	1,7	Nevsehir	0,7	Bursa	0,4	Edirne	0,2
Japan	Istanbul	34,2	Nevsehir	12,5	Denizli	9,9	Izmir	9,5	Canakkal	8,7	Ankara	7,0	Antalya	5,0	Konya	3,6	Sakarya	2,6	Aydin	1,9
Canada	Istanbul	52,1	Antalya	13,4	Ankara	9,7	Aydin	6,3	Izmir	6,0	Nevsehir	2,0	Denizli	1,7	Bursa	1,4	Mugla	1,2	Canakkal	0,9
Bulgaria	Istanbul	37,8	Aydin	25,7	Antalya	14,2	Balikesir	6,4	Izmir	3,8	Ankara	2,9	Mugla	1,6	Edirne	1,2	Bursa	1,2	Canakkal	1,1
Hungary	Antalya	54,2	Istanbul	37,4	Ankara	2,7	Aydin	1,8	Izmir	0,8	Tekirdag	0,4	Bursa	0,3	Isparta	0,3	Mugla	0,3	Bolu	0,2
Poland	Antalya	83,5	Istanbul	5,1	Denizli	2,9	Mugla	2,8	Nevsehir	1,3	Edirne	1,0	Ankara	0,9	Izmir	0,8	Canakkal	0,4	Balikesir	0,4
Romania	Antalya	37,7	Istanbul	24,3	Aydin	20,4	Canakkal	5,2	Izmir	4,1	Ankara	3,4	Edirne	1,0	Balikesir	0,5	Rize	0,4	Yalova	0,4
C.Ind.States	Antalya	64,7	Istanbul	22,1	Ankara	5,0	Trabzon	2,1	Mugla	1,8	Denizli	1,6	Artvin	0,9	Aydin	0,5	Igdir	0,3	Erzurum	0,2
Yugoslavia	Istanbul	49,1	Antalya	28,8	Aydin	14,5	Balikesir	2,6	Adana	1,1	Izmir	0,9	Mugla	0,8	Ankara	0,5	Bursa	0,5	Edirne	0,3
Iraq	Istanbul	31,3	Ankara	23,4	Icel	15,6	Aydin	7,7	Gaziantep	6,2	Diyarbaki	4,3	Antalya	3,2	Mugla	2,4	Izmir	2,1	Adana	1,0
Kuwait	Istanbul	77,1	Bursa	8,3	Ankara	5,4	Antalya	2,1	Yalova	1,7	Hatay	1,3	Icel	1,2	Afyon	0,5	Bolu	0,5	Izmir	0,4
Libya	Istanbul	96,6	Ankara	1,7	Izmir	0,7	Mugla	0,4	Burdur	0,2	Hatay	0,2	Antalya	0,1	Gaziantep	0,1	Usak	0,1	Konya	0,0
Lebanon	Istanbul	45,1	Mugla	32,7	Icel	8,6	Hatay	4,8	Denizli	2,5	Antalya	2,1	Ankara	1,2	Gaziantep	0,4	Izmir	0,4	Aksaray	0,3
Egypt	Istanbul	78,9	Antalya	8,0	Izmir	4,0	Ankara	3,5	Icel	1,5	Mugla	0,9	Konya	0,7	Bursa	0,6	Hatay	0,4	Ardahan	0,4
Syria	Istanbul	42,7	Icel	25,7	Hatay	7,2	Antalya	5,3	Gaziantep	4,1	Adana	2,8	Ankara	2,6	Bursa	2,1	Izmir	2,1	Mugla	1,2
S.Arabia	Istanbul	56,6	Icel	13,1	Bursa	11,0	Ankara	4,9	Antalya	3,9	Hatay	2,7	Izmir	1,1	Mugla	1,0	Bolu	0,9	Adana	0,9
Jordan	Antalya	47,1	Istanbul	31,6	Icel	8,6	Hatay	6,6	Ankara	1,7	Bursa	0,8	Mugla	0,8	Izmir	0,7	Gaziantep	0,6	Ordu	0,3
Iran	Istanbul	47,0	Ankara	16,3	Mugla	12,9	Antalya	9,1	Van	6,9	Izmir	2,3	Agri	1,0	Bursa	0,7	Erzurum	0,7	Tekirdag	0,5
Pakistan	Istanbul	75,2	Ankara	11,9	Izmir	4,8	Antalya	2,6	Adana	1,6	Bilecik	1,0	Icel	0,6	Gaziantep	0,3	Tekirdag	0,3	Bursa	0,2
Other	Istanbul	32,6	Antalya	32,3	Mugla	22,0	Ankara	2,8	Izmir	2,3	Aydin	1,5	Nevsehir	1,4	Denizli	0,8	Balikesir	0,8	Bursa	0,5
Tot.Foreign	Antalya	56,1	Istanbul	14,1	Mugla	13,9	Aydin	4,4	Izmir	4,3	Ankara	1,8	Nevsehir	1,3	Denizli	1,2	Bursa	0,4	Canakkal	0,4
Tot.Turkish	Antalya	21,2	Istanbul	13,5	Izmir	8,8	Mugla	8,7	Ankara	8,0	Aydin	4,0	Balikesir	3,5	Bursa	2,7	Denizli	2,2	Bolu	2,2
Grand total	Antalya	43,3	Istanbul	13,9	Mugla	12,0	Izmir	6,0	Aydin	4,2	Ankara	4,0	Denizli	1,6	Balikesir	1,5	Nevsehir	1,4	Bursa	1,3

Appendix 24. Important visitor markets of provinces of Turkey in 2000

Rank	First	%	Second	%	Third	%	Fourth	%	Fifth	%	Sixth	%	Seventh	%	Eighth	%	Nineth	%	Tenth	%
Adana	U.S.A.	22,2	Germany	14,6	Italy	8,5	Britain	6,4	Japan	3,3	Yugoslav	3,0	France	2,7	Syria	2,1	Benelux	1,9	Switzerla	1,7
Adiyaman	Germany	12,2	S.Arabia	12,2	Benelux	6,9	Japan	6,1	Italy	3,0	U.S.A.	2,7	Scandinav	2,6	Yugoslav	2,4	Austria	2,1	Poland	1,6
Afyon	Germany	12,9	Bulgaria	11,6	Japan	7,0	Benelux	4,8	S.Arabia	4,8	Yugoslav	3,8	Jordan	2,9	Italy	2,8	Canada	2,6	Scandinav	1,6
Agri	Poland	39,4	Bulgaria	7,0	S.Arabia	6,5	Germany	2,7	Benelux	1,3	Yugoslav	1,2	Japan	1,1	Austria	1,1	Italy	1,0	U.S.A.	0,8
Amasya	Bulgaria	24,6	Yugoslav	16,4	Switzerla	7,8	Germany	7,2	Japan	4,8	C.I.S.	3,5	Italy	2,6	Austria	2,5	U.S.A.	2,3	Scandinav	2,1
Ankara	Romania	31,5	Bulgaria	12,1	Germany	5,7	S.Arabia	5,5	Japan	5,2	Poland	4,8	Benelux	4,2	Yugoslav	3,5	Italy	2,6	France	2,0
Antalya	Germany	55,1	Romania	12,8	U.S.A.	6,9	Italy	6,1	Japan	4,0	Yugoslav	2,5	Britain	1,4	Spain	1,3	Syria	1,2	Benelux	1,0
Artvin	Romania	77,9	Yugoslav	1,5	Italy	1,5	Germany	1,4	Bulgaria	1,0	Britain	1,0	Japan	0,8	U.S.A.	0,7	Austria	0,6	France	0,5
Aydin	Italy	34,2	Japan	19,4	Yugoslav	16,7	Germany	11,2	Bulgaria	4,5	Iraq	2,7	Benelux	1,5	Iran	1,3	Romania	1,3	Pakistan	1,3
Balikesir	Germany	41,2	Italy	7,6	Japan	6,4	Iran	4,5	Switzerla	3,6	Britain	3,6	Pakistan	3,2	Bulgaria	1,2	Yugoslav	1,1	Spain	1,0
Bilecik	Benelux	62,3	Germany	15,9	Libya	9,0	Romania	2,7	Britain	1,9	Yugoslav	1,5	Japan	1,2	Italy	0,8	U.S.A.	0,0	France	0,0
Bingol	Germany	37,1	Romania	15,7	Poland	13,5	Yugoslav	5,6	Syria	5,6	U.S.A.	2,2	Japan	2,2	Italy	0,0	Britain	0,0	France	0,0
Bitlis	Germany	68,6	Italy	12,7	S.Arabia	5,7	Japan	4,0	Scandinav	4,0	Britain	2,5	Yugoslav	1,5	U.S.A.	1,1	France	0,0	Syria	0,0
Bolu	Japan	34,0	Germany	9,5	Benelux	6,6	S.Arabia	5,8	Bulgaria	4,6	Britain	3,7	Yugoslav	3,5	Italy	2,1	Syria	1,9	Jordan	1,8
Burdur	Germany	20,5	Japan	15,4	Yugoslav	13,2	Lebanon	11,3	Italy	6,7	Benelux	2,6	Syria	1,0	Poland	1,0	Bulgaria	0,6	Britain	0,4
Bursa	Germany	22,7	Benelux	12,0	Japan	11,6	Bulgaria	10,2	S.Arabia	5,1	France	4,5	Switzerla	3,9	Jordan	3,4	Yugoslav	3,0	Romania	2,8
Canakkale	S.Arabia	30,5	Bulgaria	12,8	Germany	8,1	Iraq	7,5	Italy	6,7	Japan	5,5	Scandinav	5,2	Yugoslav	4,2	Benelux	3,2	France	1,7
Cankiri	Japan	41,6	Germany	36,6	Yugoslav	7,9	S.Arabia	5,0	Benelux	4,0	Iraq	2,0	Poland	2,0	Bulgaria	1,0	U.S.A.	0,0	Italy	0,0
Corum	Yugoslavi	51,3	Benelux	15,9	Japan	10,6	Germany	5,3	Bulgaria	2,6	Iran	2,3	Switzerla	1,7	S.Arabia	1,3	Italy	0,7	U.S.A.	0,0
Denizli	Germany	35,2	Japan	16,0	Romania	14,1	S.Arabia	11,3	Bulgaria	4,3	Yugoslav	2,8	Benelux	2,5	Spain	2,1	Italy	2,0	France	2,0
Diyarbakir	Germany	24,7	Egypt	18,8	Yugoslav	8,1	Italy	6,8	Bulgaria	6,6	Britain	6,2	S.Arabia	4,3	Japan	4,1	Poland	3,0	Syria	2,9
Edirne	Spain	26,2	Iraq	17,4	Iran	8,8	Switzerla	6,5	Germany	3,9	Italy	3,9	Romania	3,4	Pakistan	3,4	Bulgaria	3,3	Scandinav	3,3
Elazig	Bulgaria	33,0	Italy	27,9	Yugoslav	15,7	S.Arabia	9,8	Germany	5,1	Benelux	3,5	Romania	1,4	Britain	1,3	Japan	0,8	Egypt	0,4
Erzincan	S.Arabia	35,8	Japan	9,5	Bulgaria	8,8	Poland	7,8	Germany	7,4	Italy	6,8	Benelux	6,4	Yugoslav	5,1	Spain	3,4	Iraq	1,4
Erzurum	Romania	53,1	Germany	8,8	Poland	7,2	Italy	5,9	Japan	5,6	Bulgaria	3,5	S.Arabia	3,3	Yugoslav	1,9	Benelux	1,7	Hungary	0,5
Eskisehir	U.S.A.	21,1	Germany	16,3	Benelux	15,7	Bulgaria	9,6	Yugoslav	7,9	Romania	4,4	Japan	4,0	Switzerla	3,2	S.Arabia	3,1	Britain	2,0
Gaziantep	Germany	15,5	Benelux	9,7	Canada	8,9	Egypt	8,2	Yugoslav	5,9	Bulgaria	5,1	Japan	5,1	Romania	4,3	Poland	3,1	U.S.A.	2,6
Giresun	Romania	21,8	Switzerla	18,2	Italy	13,8	S.Arabia	10,3	Yugoslav	7,6	Germany	6,8	Bulgaria	6,8	Japan	6,1	U.S.A.	4,1	France	0,7
Gumushan	Romania	31,7	Italy	12,2	Bulgaria	11,0	Germany	9,8	Japan	9,8	Yugoslav	9,8	U.S.A.	6,1	France	3,7	S.Arabia	3,7	Britain	0,0
Hakkari	Germany	72,3	Syria	14,0	Bulgaria	5,9	U.S.A.	1,5	S.Arabia	1,5	France	1,3	Yugoslav	0,4	Poland	0,2	Italy	0,0	Britain	0,0
Hatay	Germany	19,3	Canada	12,1	Hungary	8,1	Kuwait	7,1	Benelux	6,5	Bulgaria	6,5	Japan	5,9	Jordan	5,3	Italy	3,1	Britain	2,6

Appendix 24 continued...

Isparta	Germany	28,8	Bulgaria	15,4	Yugoslav	13,1	Italy	10,5	Japan	4,6	Switzerla	3,6	S.Arabia	3,1	Benelux	3,0	Scandinav	1,8	C.I.S.	1,7
Icel	Germany	15,7	Canada	13,2	Jordan	7,8	Benelux	5,3	Egypt	4,9	Hungary	4,5	Yugoslav	4,3	Bulgaria	4,2	Italy	4,1	Kuwait	2,8
Istanbul	Romania	17,4	Bulgaria	9,3	Germany	8,1	Japan	6,8	France	5,8	Benelux	4,6	Yugoslav	4,6	S.Arabia	3,4	Italy	2,9	Switzerla	2,4
Izmir	Japan	28,8	Germany	18,2	Italy	15,4	Britain	9,9	Yugoslav	7,7	Bulgaria	3,9	S.Arabia	3,1	Benelux	2,1	Switzerla	1,6	U.S.A.	1,0
Kars	S.Arabia	5,8	Romania	5,3	Yugoslav	5,0	Bulgaria	4,1	Italy	2,2	Japan	2,2	Germany	2,1	Benelux	1,6	U.S.A.	1,0	Switzerla	0,7
Kastamon	Italy	22,7	Benelux	18,1	Romania	10,8	Switzerla	8,7	Poland	8,1	Yugoslav	2,6	Germany	1,9	S.Arabia	0,8	Egypt	0,8	Japan	0,7
Kayseri	Germany	26,8	Japan	23,4	Bulgaria	13,2	Benelux	7,7	Yugoslav	3,8	U.S.A.	2,9	Scandinav	1,9	S.Arabia	1,5	Switzerla	1,4	Syria	1,1
Kirklareli	Romania	32,7	Iraq	9,9	Germany	7,4	Iran	6,4	Switzerla	5,3	Benelux	3,3	Yugoslav	2,5	Pakistan	2,1	Japan	1,9	Bulgaria	1,3
Kirsehir	U.S.A.		Germany		Italy		Britain		Japan		Yugoslav		France		Syria		Benelux		Switzerla	
Kocaeli	Germany	30,9	Benelux	19,5	Yugoslav	11,8	Italy	8,6	Japan	7,2	Britain	3,6	Bulgaria	3,5	S.Arabia	1,9	France	1,7	U.S.A.	1,5
Konya	S.Arabia	32,0	Bulgaria	18,4	Benelux	11,6	Germany	7,1	Japan	6,1	Italy	3,5	France	3,3	Switzerla	1,6	Yugoslav	1,6	Poland	1,3
Kutahya	Bulgaria	25,6	Germany	17,4	Switzerla	15,8	Italy	8,0	Japan	7,9	S.Arabia	6,4	France	6,0	Benelux	2,9	Scandinav	1,8	Britain	1,6
Malatya	Germany	23,7	Benelux	23,2	Bulgaria	9,6	Japan	9,1	France	8,2	S.Arabia	6,2	Yugoslav	6,0	Italy	3,6	Romania	2,8	C.I.S.	1,3
Manisa	Germany	29,4	Benelux	16,4	Japan	16,1	S.Arabia	7,3	Yugoslav	4,1	Jordan	3,0	Italy	2,6	Bulgaria	1,9	Switzerla	1,0	Poland	0,8
Kah.Mara	Germany	64,8	Syria	4,9	S.Arabia	2,3	Bulgaria	1,6	Scandinav	1,6	Benelux	1,4	Hungary	1,3	Yugoslav	1,0	Kuwait	1,0	Japan	1,0
Mardin	Germany	43,0	Canada	14,0	Bulgaria	11,4	Benelux	9,6	Egypt	6,6	S.Arabia	4,7	Japan	3,6	Italy	3,3	Syria	2,7	Austria	0,4
Mugla	Germany	28,4	Yugoslav	24,0	Italy	19,6	Japan	4,5	U.S.A.	2,9	Romania	1,5	Britain	1,4	Bulgaria	1,0	Benelux	0,7	Poland	0,5
Mus	U.S.A.	0,0	Germany	0,0	Italy	0,0	Britain	0,0	Japan	0,0	Yugoslav	0,0	France	0,0	Syria	0,0	Benelux	0,0	Switzerla	0,0
Nevsehir	Japan	20,6	S.Arabia	13,8	Bulgaria	13,5	Germany	12,6	France	8,3	Italy	7,4	Benelux	6,5	Yugoslav	2,4	U.S.A.	1,5	Switzerla	1,0
Nigde	U.S.A.		Germany		Italy		Britain		Japan		Yugoslav		France		Syria		Benelux		Switzerla	
Ordu	Romania	32,4	Benelux	16,9	Germany	10,5	Italy	5,3	Bulgaria	2,2	Scandinav	1,6	U.S.A.	1,5	Austria	1,5	Kuwait	1,4	Switzerla	1,0
Rize	Romania	50,8	Iraq	15,8	S.Arabia	5,4	Germany	3,9	Jordan	2,2	Bulgaria	2,0	Switzerla	1,9	Yugoslav	1,9	Benelux	1,0	Japan	0,9
Sakarya	S.Arabia	82,6	Germany	9,3	Bulgaria	2,1	Austria	1,5	France	0,8	Italy	0,7	Yugoslav	0,6	Benelux	0,5	Japan	0,4	Iraq	0,3
Samsun	Romania	42,2	Switzerla	10,3	Italy	9,2	Bulgaria	7,2	Iraq	4,5	Benelux	3,9	Japan	3,6	Germany	3,3	Yugoslav	2,8	Scandinav	0,5
Siirt	Japan	20,5	Germany	19,3	Italy	7,2	Canada	7,2	Pakistan	6,0	Syria	4,8	Scandinav	4,8	Yugoslav	3,6	Bulgaria	3,6	Austria	2,4
Sinop	Switzerla	56,7	Bulgaria	25,6	Romania	5,9	Yugoslav	3,1	Scandinav	2,0	U.S.A.	1,6	Italy	1,6	Syria	1,6	Germany	1,2	Britain	0,0
Sivas	Germany	24,2	Japan	20,3	Yugoslav	14,8	Benelux	7,8	S.Arabia	6,4	Libya	5,0	Switzerla	3,9	Poland	1,9	Bulgaria	1,7	U.S.A.	1,4
Tekirdag	Germany	23,0	Benelux	13,0	U.S.A.	11,2	Japan	7,9	Yugoslav	5,8	Britain	5,5	Poland	4,7	Bulgaria	3,9	Iran	3,7	Switzerla	3,1
Tokat	Germany	28,3	Japan	27,3	S.Arabia	12,5	U.S.A.	0,0	Italy	0,0	Britain	0,0	Yugoslav	0,0	France	0,0	Syria	0,0	Benelux	0,0
Trabzon	Romania	79,3	S.Arabia	3,8	Yugoslav	2,1	Germany	2,0	Bulgaria	1,4	Italy	1,0	Switzerla	0,8	Japan	0,5	Benelux	0,5	Britain	0,4
Tunceli	U.S.A.		Germany		Italy		Britain		Japan		Yugoslav		France		Syria		Benelux		Switzerla	
Sanli Urfa	Germany	44,8	Japan	8,9	Italy	8,5	Bulgaria	8,0	Benelux	5,8	U.S.A.	4,2	S.Arabia	4,0	Yugoslav	2,9	Poland	2,5	Iraq	1,6
Usak	Benelux	23,9	Germany	15,6	Italy	10,3	Britain	8,5	France	5,3	Switzerla	4,2	Pakistan	2,4	U.S.A.	2,2	Hungary	1,7	Yugoslav	1,6
Van	Poland	59,9	Bulgaria	5,8	S.Arabia	4,7	Italy	4,4	Germany	3,8	Yugoslav	3,0	Britain	2,4	Benelux	2,3	Japan	2,0	Austria	0,9

Appendix 24 continued...

Yozgat	Germany	22,8	Yugoslav	13,0	Bulgaria	11,6	Japan	8,7	Poland	5,3	Switzerla	5,1	Romania	4,0	France	3,5	Benelux	2,7	Austria	2,7
Zonguldak	Germany	37,7	Yugoslav	16,1	S.Arabia	11,7	Bulgaria	9,8	Romania	3,6	Benelux	2,3	Switzerla	1,6	France	0,4	Italy	0,3	Canada	0,2
Aksaray	Japan	36,2	Germany	33,3	Bulgaria	18,5	Iran	2,2	Canada	1,7	Italy	1,2	Hungary	0,9	Benelux	0,8	Yugoslav	0,7	Spain	0,5
Bayburt	Romania	68,4	Yugoslav	21,1	Germany	10,5	U.S.A.	0,0	Italy	0,0	Britain	0,0	Japan	0,0	France	0,0	Syria	0,0	Benelux	0,0
Karaman	U.S.A.		Germany		Italy		Britain		Japan		Yugoslav		France		Syria		Benelux		Switzerla	
Kirikkale	U.S.A.		Germany		Italy		Britain		Japan		Yugoslav		France		Syria		Benelux		Switzerla	
Batman	Italy	41,8	Bulgaria	13,9	Germany	12,0	S.Arabia	6,9	Britain	2,8	Yugoslav	2,5	Benelux	2,3	Poland	2,1	U.S.A.	1,6	Scandinav	0,7
Sirnak	Egypt	48,5	Germany	27,3	Poland	18,2	Yugoslav	6,1	U.S.A.	0,0	Italy	0,0	Britain	0,0	Japan	0,0	France	0,0	Syria	0,0
Bartin	Germany	30,0	Switzerla	15,6	Italy	12,3	Iraq	11,5	Yugoslav	5,8	Japan	4,9	Benelux	3,7	Bulgaria	3,3	S.Arabia	2,5	U.S.A.	1,6
Ardahan	Japan	19,5	Australia	10,8	Italy	8,7	Yugoslav	8,7	Iran	8,7	U.S.A.	8,1	Germany	2,2	Britain	0,1	France	0,0	Syria	0,0
Igdir	Romania	96,0	Poland	2,3	Germany	0,6	Italy	0,5	Austria	0,4	Hungary	0,3	U.S.A.	0,0	Britain	0,0	Japan	0,0	Yugoslav	0,0
Yalova	Iraq	12,1	Yugoslav	7,5	Jordan	5,2	Bulgaria	5,0	Germany	4,7	Greece	3,5	Romania	3,4	Italy	2,7	Japan	2,4	Switzerla	1,7
Karabuk	S.Arabia	43,7	Germany	11,3	Japan	4,9	Switzerla	4,6	Bulgaria	3,1	Italy	2,8	Benelux	2,8	Austria	2,8	U.S.A.	2,2	Yugoslav	1,6
Total	Germany	38,4	Romania	11,1	Italy	9,0	Yugoslav	6,7	Japan	6,6	U.S.A.	4,6	Bulgaria	2,9	Benelux	1,8	Britain	1,7	S.Arabia	1,4

Appendix 25. Top ten important visitor markets of regions of Turkey in 2000

Rank	First	%	Second	%	Third	%	Fourth	%	Fifth	%	Sixth	%	Seventh	%	Eighth	%	Nineth	%	Tenth	%
Marmara	C.I.S.	16,0	Germany	9,3	U.S.A.	9,2	France	6,9	Spain	5,5	Italy	4,8	Britain	4,5	Japan	4,3	Benelux	3,1	Greece	2,4
Aegean	Germany	23,7	Benelux	20,6	Britain	18,6	France	12,2	Scandinav	2,7	U.S.A.	2,3	Austria	2,0	C.I.S.	1,9	Japan	1,3	Italy	1,2
Mediterra.	Germany	54,8	C.I.S.	12,7	Austria	6,9	Benelux	6,1	France	3,9	Britain	2,5	Scandinav	1,4	Poland	1,3	Switzerla	1,2	Italy	1,0
C.Anatolia	C.I.S.	17,1	U.S.A.	13,0	France	11,7	Japan	9,8	Germany	9,1	Italy	5,5	Spain	4,5	Benelux	4,4	Britain	3,0	Iran	2,7
Black Sea	C.I.S.	62,1	France	5,0	Germany	3,7	Japan	3,5	Britain	2,5	U.S.A.	2,4	Benelux	2,1	Italy	2,0	Greece	1,5	Scandinav	0,9
E.Anatol.	C.I.S.	31,8	Iran	23,6	Germany	6,4	U.S.A.	4,4	Benelux	4,1	Japan	3,8	France	3,3	Britain	2,6	Italy	2,5	Scandinav	1,0
S.E.Anato	Germany	24,7	Iraq	7,6	Italy	7,4	U.S.A.	6,4	Syria	5,7	France	5,5	Britain	4,9	Benelux	4,6	Japan	3,7	Austria	2,7
Turkey	Germany	38,4	C.I.S.	11,1	Benelux	9,0	Britain	6,7	France	6,6	Austria	4,6	U.S.A.	2,9	Italy	1,8	Scandinav	1,7	Japan	1,4
Coastal	Germany	39,6	C.I.S.	10,9	Benelux	9,3	Britain	6,9	France	6,3	Austria	4,8	U.S.A.	2,6	Scandinav	1,7	Italy	1,7	Spain	1,0
Inner City	C.I.S.	16,1	Germany	15,9	France	12,5	U.S.A.	10,2	Japan	9,6	Italy	4,8	Benelux	3,8	Spain	3,5	Britain	3,0	Iran	2,7
Turkey	Germany	38,4	C.I.S.	11,1	Benelux	9,0	Britain	6,7	France	6,6	Austria	4,6	U.S.A.	2,9	Italy	1,8	Scandinav	1,7	Japan	1,4

Appendix 26. Average Length of Stay in provinces where most nights spent by nationality (2000) (Provinces ranked according to no of nights spent in regions)

Rank	First		Second		Third		Fourth		Fifth		Sixth		Seventh		Eighth		Nineth		Tenth	
Austria	Tekirdag	10,7	Mugla	6,1	Antalya	5,7	Izmir	5,1	Eskisehir	4,7	Kocaeli	4,2	Kars	3,4	Balikesir	2,9	Karabuk	2,8	Malatya	2,6
Germany	Zongulda	8,1	Antalya	7,4	K.Maras	6,8	Kocaeli	6,6	Hakkari	6,6	Mugla	6,4	Aydin	5,4	Aksaray	4,9	Bilecik	4,7	Tekirdag	4,4
Benelux	Usak	13,2	Kastamon	10,2	Samsun	7,4	Antalya	7,1	Aydin	7,0	Kocaeli	5,8	Mugla	5,3	Izmir	4,6	Kirklareli	4,4	Ordu	3,9
Scandinavi	Ardahan	31,0	Izmir	9,9	Balikesir	8,8	Tekirdag	5,9	Antalya	5,8	Mugla	5,0	Bilecik	5,0	Eskisehir	4,3	Usak	4,3	Elazig	3,0
France	Aydin	6,1	Mugla	6,1	Ardahan	6,0	Antalya	5,8	Kocaeli	5,5	Tekirdag	4,8	Kirklareli	3,4	Izmir	3,3	Bartin	3,0	Gumusha	2,7
Britain	Aydin	8,8	Mugla	7,7	Antalya	7,1	Kocaeli	6,8	Izmir	5,7	Kirklareli	5,3	Zongulda	4,1	Bartin	3,5	Eskisehir	3,1	Afyon	3,0
Spain	Kutahya	17,7	Yozgat	9,0	Sakarya	7,6	K.Maras	5,0	Kocaeli	3,3	Tekirdag	3,1	Agri	3,0	Aydin	2,7	Istanbul	2,5	Antalya	2,4
Switzerland	Hakkari	11,0	Antalya	8,6	Balikesir	4,7	Izmir	4,6	Aydin	4,3	Afyon	4,0	Siirt	4,0	Kirklareli	3,8	K.Maras	3,7	Icel	3,3
Italy	Kastamon	7,3	Aydin	6,3	Kocaeli	5,6	Eskisehir	4,5	Tekirdag	4,3	Antalya	4,2	Ordu	4,1	Kirklareli	3,9	Bilecik	3,6	Adana	3,5
Greece	Eskisehir	9,2	Kirklareli	2,8	Adana	2,8	Aydin	2,7	Isparta	2,3	Kayseri	2,2	Istanbul	2,2	Kocaeli	2,1	Van	2,0	Afyon	2,0
USA	Tekirdag	6,5	Kocaeli	5,3	Zongulda	5,1	Hakkari	3,5	Aksaray	3,5	Eskisehir	3,4	Kirklareli	3,0	Mardin	2,9	Batman	2,5	Afyon	2,4
Australia	Antalya	10,1	K.Maras	7,4	Mugla	6,6	Artvin	5,9	Eskisehir	4,9	Icel	4,3	Tekirdag	3,8	Aydin	2,3	Gaziantep	2,3	Van	2,1
Japan	Giresun	9,3	Manisa	6,1	Sakarya	5,1	Kocaeli	4,4	Tekirdag	3,6	Zongulda	3,5	Eskisehir	3,2	Gumusha	3,0	Trabzon	2,4	Adana	2,1
Canada	Sakarya	3,2	Icel	3,0	K.Maras	3,0	Aydin	2,6	Antalya	2,5	Istanbul	2,5	Kocaeli	2,2	Nevsehir	2,1	Ordu	2,1	Malatya	2,0
Bulgaria	Kayseri	9,2	Antalya	6,5	Aydin	4,5	Erzurum	4,3	Adana	4,3	Ardahan	4,0	Kah.	3,0	Van	2,8	Icel	2,5	Kirklareli	2,5
Hungary	Kocaeli	20,3	Bursa	12,9	Antalya	5,6	Agri	5,0	Aydin	4,2	Istanbul	2,7	Tekirdag	2,2	Van	2,1	Hatay	2,0	Kayseri	2,0
Poland	Erzurum	9,0	Yalova	8,0	Antalya	5,4	Mugla	4,2	Aydin	3,2	Edirne	3,0	Kocaeli	2,4	Izmir	2,2	Trabzon	2,2	Istanbul	2,1
Romania	Van	9,0	Izmir	7,4	Bartin	7,0	Antalya	5,3	Aydin	5,1	Kirklareli	4,3	Icel	4,1	Samsun	4,0	Nevsehir	3,1	Gaziantep	2,7
C.Ind.State.	Eskisehir	12,3	Ankara	8,2	Aydin	6,3	Antalya	6,2	Balikesir	6,1	Erzurum	5,1	Afyon	5,0	Tekirdag	4,6	Izmir	4,4	Mugla	4,4
Yugoslavia	Adana	15,0	Mugla	11,2	Aydin	8,6	Balikesir	5,5	Antalya	4,7	Usak	3,1	Tekirdag	3,0	Afyon	3,0	Kirklareli	3,0	Izmir	2,5
Iraq	Aydin	9,5	Yalova	6,0	Antalya	5,2	Artvin	4,7	Sanli Urfa	3,8	Canakkal	3,2	Denizli	3,0	Afyon	2,7	Istanbul	2,4	Adana	2,3
Kuwait	Afyon	8,2	Icel	3,5	Ankara	3,2	Izmir	2,8	Bursa	2,6	Istanbul	2,5	Antalya	2,3	Bolu	2,1	Rize	2,0	Yalova	2,0
Libya	Konya	3,3	Istanbul	3,3	Tekirdag	3,0	Ankara	2,7	Antalya	2,7	Izmir	2,1	Eskisehir	2,0	Yalova	1,5	Gaziantep	1,4	Hatay	1,2
Lebanon	Afyon	6,2	Erzurum	5,3	Mugla	3,5	Bursa	2,4	Istanbul	2,2	Antalya	2,2	K.Maras	2,2	Kayseri	2,0	Izmir	1,9	Ankara	1,8
Egypt	Aydin	10,6	Afyon	7,5	Antalya	5,3	Adana	4,4	Icel	4,0	Tekirdag	4,0	Izmir	3,3	Istanbul	3,2	Mugla	2,6	K.Maras	2,5
Syria	Manisa	4,0	Antalya	3,9	Istanbul	2,7	Afyon	2,7	Yalova	2,2	Izmir	2,2	Adana	2,0	Kocaeli	2,0	Siirt	2,0	Batman	2,0
S.Arabia	Manisa	29,0	Trabzon	4,4	Antalya	3,4	Icel	3,2	Istanbul	2,4	Bursa	2,2	Izmir	2,2	Afyon	2,1	Kocaeli	2,1	Denizli	2,0
Jordan	Afyon	5,2	Izmir	3,6	Antalya	3,0	Eskisehir	2,9	Ordu	2,8	Tekirdag	2,8	Kah.	2,4	Istanbul	2,2	Icel	2,1	Isparta	2,0
Iran	Aydin	4,8	Mardin	4,0	Karabuk	4,0	Mugla	4,0	Antalya	3,8	Afyon	3,4	Izmir	3,0	Ankara	2,8	Tekirdag	2,6	Istanbul	2,4
Pakistan	Sivas	4,5	Bilecik	4,2	Icel	3,1	Rize	3,0	Yozgat	3,0	Istanbul	2,8	Antalya	2,8	Yalova	2,5	Izmir	2,3	Tekirdag	2,2
Other	Kirklareli	10,1	Mugla	7,6	Hakkari	7,0	Kocaeli	5,0	Antalya	4,4	Bilecik	4,4	K.Maras	3,4	Adana	3,3	Giresun	3,3	Samsun	3,1
Tot.Foreign	Antalya	6,5	Mugla	6,1	Aydin	5,5	Hakkari	5,3	Kocaeli	5,2	Kah.	4,3	Kirklareli	3,9	Sakarya	3,9	Eskisehir	3,8	Tekirdag	3,6
Tot.Turkish	Kirsehir	3,9	Antalya	3,3	Kirklareli	2,7	Balikesir	2,2	Tekirdag	2,1	Mugla	2,1	Izmir	2,0	Aydin	2,0	Afyon	2,0	Tunceli	1,9
Grand total	Antalya	5,5	Mugla	4,0	Kirsehir	3,9	Aydin	3,5	Kirklareli	2,8	Izmir	2,5	Tekirdag	2,3	Balikesir	2,2	Istanbul	2,0	Afyon	2,0

Appendix 27. Average Length of Stay in regions where most nights spent by nationality (2000) (Regions ranked according to number of nights spent in regions)

Rank	First		Second		Third		Fourth		Fifth		Sixth		Seventh								
Austria	Mediterran.	5,7	Aegean	5,5	C.Anatolia	2,0	Marmara	2,0	E.Anatolia	1,8	Black Sea	1,8	S.E.Anatol.	1,5		Coastal	5,3	Inner	2,0	Turkey	5,2
Germany	Mediterran.	7,4	Aegean	4,4	Marmara	2,2	C.Anatolia	1,7	Black Sea	1,7	E.Anatolia	1,6	S.E.Anatol.	1,3		Coastal	6,5	Inner	1,3	Turkey	6,0
Benelux	Mediterran.	7,0	Aegean	5,5	E.Anatolia	2,0	Black Sea	1,9	Marmara	1,9	C.Anatolia	1,8	S.E.Anatol.	1,1		Coastal	5,4	Inner	1,7	Turkey	5,2
Scandinavi	Aegean	6,9	Mediterran.	5,7	Marmara	2,9	E.Anatolia	2,5	C.Anatolia	1,9	S.E.Anatol.	1,4	Black Sea	1,2		Coastal	5,4	Inner	1,6	Turkey	5,1
France	Mediterran.	5,6	Aegean	3,6	Marmara	2,1	E.Anatolia	2,0	C.Anatolia	1,8	S.E.Anatol.	1,4	Black Sea	1,1		Coastal	4,0	Inner	1,4	Turkey	3,4
Britain	Aegean	7,3	Mediterran.	6,8	Marmara	2,3	S.E.Anatol.	1,8	E.Anatolia	1,6	C.Anatolia	1,5	Black Sea	1,4		Coastal	6,0	Inner	1,4	Turkey	5,6
Spain	Marmara	2,5	Mediterran.	2,2	E.Anatolia	1,7	S.E.Anatol.	1,7	C.Anatolia	1,4	Black Sea	1,3	Aegean	1,2		Coastal	2,4	Inner	1,4	Turkey	2,1
Switzerland	Mediterran.	8,5	Aegean	3,0	Marmara	2,4	E.Anatolia	2,1	C.Anatolia	1,7	S.E.Anatol.	1,5	Black Sea	1,1		Coastal	5,8	Inner	1,6	Turkey	5,5
Italy	Mediterran.	4,1	Marmara	2,3	Aegean	2,3	Black Sea	1,8	S.E.Anatol.	1,7	C.Anatolia	1,6	E.Anatolia	1,5		Coastal	2,8	Inner	1,5	Turkey	2,5
Greece	Marmara	2,1	Aegean	1,9	Mediterran.	1,7	C.Anatolia	1,6	E.Anatolia	1,3	S.E.Anatol.	1,2	Black Sea	1,2		Coastal	2,0	Inner	1,5	Turkey	2,0
USA	Mediterran.	2,3	Marmara	2,0	C.Anatolia	1,8	Aegean	1,8	E.Anatolia	1,6	Black Sea	1,5	S.E.Anatol.	1,5		Coastal	2,1	Inner	1,7	Turkey	2,0
Australia	Mediterran.	13,	Aegean	3,6	E.Anatolia	2,0	Black Sea	2,0	C.Anatolia	1,7	S.E.Anatol.	1,3	Marmara	0,6		Coastal	4,5	Inner	1,6	Turkey	4,2
Japan	Black Sea	1,9	Marmara	1,5	Mediterran.	1,4	E.Anatolia	1,3	C.Anatolia	1,2	S.E.Anatol.	1,2	Aegean	1,1		Coastal	1,4	Inner	1,2	Turkey	1,3
Canada	Mediterran.	2,4	Marmara	2,3	Aegean	1,9	C.Anatolia	1,6	Black Sea	1,5	E.Anatolia	1,3	S.E.Anatol.	1,3		Coastal	2,3	Inner	1,5	Turkey	2,1
Bulgaria	Mediterran.	6,0	Aegean	3,6	E.Anatolia	3,2	Marmara	1,9	C.Anatolia	1,7	S.E.Anatol.	1,6	Black Sea	1,5		Coastal	2,6	Inner	1,5	Turkey	2,5
Hungary	Mediterran.	5,5	E.Anatolia	3,1	Aegean	2,9	Marmara	2,7	C.Anatolia	1,5	Black Sea	1,0	S.E.Anatol.	0,1		Coastal	3,8	Inner	1,5	Turkey	3,6
Poland	Mediterran.	5,4	E.Anatolia	2,4	Marmara	2,0	Aegean	1,7	Black Sea	1,6	C.Anatolia	1,2	S.E.Anatol.	1,0		Coastal	4,7	Inner	1,2	Turkey	4,0
Romania	Aegean	5,2	Mediterran.	5,2	Marmara	1,8	S.E.Anatol.	1,8	E.Anatolia	1,7	C.Anatolia	1,7	Black Sea	1,4		Coastal	3,2	Inner	1,5	Turkey	3,1
C.Ind.State	C.Anatolia	8,1	Mediterran.	6,2	Marmara	2,8	S.E.Anatol.	2,6	Aegean	2,0	E.Anatolia	1,6	Black Sea	1,2		Coastal	4,3	Inner	2,9	Turkey	4,1
F.Yugoslav	Aegean	7,6	Mediterran.	4,8	Marmara	2,2	S.E.Anatol.	2,0	C.Anatolia	1,4	Black Sea	1,1	E.Anatolia	1,0		Coastal	3,1	Inner	1,3	Turkey	3,0
Iraq	Aegean	2,8	Marmara	2,4	Mediterran.	2,2	Black Sea	2,0	C.Anatolia	1,5	S.E.Anatol.	1,5	E.Anatolia	1,1		Coastal	2,4	Inner	1,5	Turkey	2,0
Kuwait	Aegean	3,2	C.Anatolia	2,8	Marmara	2,5	Mediterran.	2,0	Black Sea	1,8	E.Anatolia	1,0	S.E.Anatol.	1,0		Coastal	2,5	Inner	2,7	Turkey	2,5
Libya	Marmara	3,2	C.Anatolia	2,7	Mediterran.	2,4	Aegean	1,5	S.E.Anatol.	1,4	Black Sea	0,0	E.Anatolia	0,0		Coastal	3,2	Inner	2,7	Turkey	3,2
Lebanon	Aegean	3,0	E.Anatolia	2,4	Marmara	2,2	S.E.Anatol.	1,7	Mediterran.	1,5	C.Anatolia	1,4	Black Sea	1,0		Coastal	2,3	Inner	1,2	Turkey	2,2
Egypt	Mediterran.	4,7	Aegean	3,3	Marmara	3,2	C.Anatolia	2,0	E.Anatolia	2,0	S.E.Anatol.	1,9	Black Sea	1,1		Coastal	3,3	Inner	2,0	Turkey	3,2
Syria	Marmara	2,7	Aegean	1,8	Mediterran.	1,7	C.Anatolia	1,5	S.E.Anatol.	1,4	E.Anatolia	1,1	Black Sea	1,0		Coastal	2,1	Inner	1,4	Turkey	2,0
S.arabia	Mediterran.	2,7	Marmara	2,3	Aegean	1,7	C.Anatolia	1,5	Black Sea	1,4	E.Anatolia	1,3	S.E.Anatol.	1,3		Coastal	2,4	Inner	1,6	Turkey	2,3
Jordan	Mediterran.	2,6	Marmara	2,1	C.Anatolia	1,8	Black Sea	1,7	Aegean	1,6	S.E.Anatol.	1,6	E.Anatolia	0,0		Coastal	2,4	Inner	1,7	Turkey	2,4
Iran	Aegean	3,8	Mediterran.	3,3	C.Anatolia	2,7	Marmara	2,4	E.Anatolia	1,8	S.E.Anatol.	1,5	Black Sea	1,4		Coastal	2,7	Inner	2,3	Turkey	2,5
Pakistan	Marmara	2,8	Mediterran.	2,3	Aegean	2,2	E.Anatolia	1,6	C.Anatolia	1,6	S.E.Anatol.	1,4	Black Sea	1,3		Coastal	2,7	Inner	1,6	Turkey	2,5
Other	Aegean	4,8	Mediterran.	4,2	Marmara	2,0	C.Anatolia	1,6	S.E.Anatol.	1,5	Black Sea	1,2	E.Anatolia	1,2		Coastal	3,1	Inner	1,5	Turkey	2,9
Tot.Foreign	Mediterran.	6,4	Aegean	4,3	Marmara	2,2	C.Anatolia	1,9	E.Anatolia	1,6	S.E.Anatol.	1,4	Black Sea	1,2		Coastal	4,6	Inner	1,6	Turkey	4,2
Tot.Turkish	Mediterran.	2,7	Aegean	2,0	Marmara	1,7	C.Anatolia	1,5	E.Anatolia	1,4	Black Sea	1,4	S.E.Anatol.	1,3		Coastal	2,1	Inner	1,5	Turkey	1,9
Grand total	Mediterran.	5,0	Aegean	3,0	Marmara	1,9	C.Anatolia	1,6	E.Anatolia	1,5	Black Sea	1,4	S.E.Anatol.	1,3		Coastal	3,4	Inner	1,5	Turkey	2,9

Appendix 28 Overall Tourism Intensity Index Values by region

	The change in Overall Tourism Intensity Index (OTII) by regions and years									
	Marmara	Aegean	Mediterran.	Central Anatolia	Black Sea	East Anatolia	S.East Anatolia	TOTAL	Coastal regions	Inner regions
1985	35.93	36.58	31.15	16.08	5.65	6.35	4.43	21.35	33.75	9.93
1990	44.21	62.05	89.86	20.34	8.05	6.09	4.73	35.68	59.60	12.40
2000	47.34	124.74	232.93	26.03	14.48	9.01	8.17	66.35	110.11	23.22
2003	51.38	159.09	324.69	27.88	15.44	8.97	9.07	84.21	142.66	26.74
	* Calculations are based on the 1985, 1990 and 2000 General Population Surveys in Turkey									

Appendix 29 Overall Tourism Intensity Index values by provinces, 1985-2003

The change in top ten Overall Tourism Intensity Index (OTII) by provinces and years																
1985				1990				2000				2003			
Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity
1	Antalya	Mediterran.	162.46	1	Antalya	Mediterran.	496.66	1	Antalya	Mediterran.	1132.54	1	Antalya	Mediterran.	1590.61
2	Mugla	Aegean	139.98	2	Mugla	Aegean	299.63	2	Mugla	Aegean	752.67	2	Mugla	Aegean	1074.43
3	Nevsehir	C. Anatolia	89.17	3	Aydin	Aegean	168.16	3	Aydin	Aegean	200.98	3	Aydin	Aegean	273.57
4	Aydin	Aegean	77.15	4	Nevsehir	C. Anatolia	114.81	4	Nevsehir	C. Anatolia	197.13	4	Nevsehir	C. Anatolia	236.46
5	Balikesir	Marmara	47.86	5	Balikesir	Marmara	103.59	5	Bolu	Black Sea	138.78	5	Bolu	Black Sea	105.13
6	Istanbul	Marmara	47.07	6	Istanbul	Marmara	50.28	6	Denizli	Aegean	84.18	6	Denizli	Aegean	94.60
7	Izmir	Aegean	40.48	7	Bolu	Black Sea	49.17	7	Izmir	Aegean	79.57	7	Izmir	Aegean	78.94
8	Bursa	Marmara	34.32	8	Izmir	Aegean	46.09	8	Canakkale	Marmara	69.45	8	Canakkale	Marmara	70.58
9	Bolu	Black Sea	31.04	9	Bursa	Marmara	44.03	9	Istanbul	Marmara	62.40	9	Istanbul	Marmara	68.03
10	Ankara	C. Anatolia	26.03	10	Ankara	C. Anatolia	36.18	10	Balikesir	Marmara	62.05	10	Balikesir	Marmara	57.34
* Calculations are based on the 1985, 1990 and 2000 General Population Surveys in Turkey															

Appendix 30. Foreign Tourism Intensity Index Values by region

	The change in Foreign Tourism Intensity Index (FTII) by regions and years									
	Marmara	Aegean	Mediterran.	Central Anatolia	Black Sea	East Anatolia	S.East Anatolia	TOTAL	Coastal regions	Inner regions
1985	20.78	22.37	21.29	6.35	1.02	1.75	1.32	11.71	20.84	3.30
1990	27.23	43.23	74.16	8.09	1.84	2.20	1.65	23.50	43.10	4.43
2000	25.45	75.94	185.15	8.08	1.91	0.90	0.45	42.05	76.84	7.84
2003	28.85	115.27	279.32	8.60	1.29	1.14	0.88	60.27	110.25	11.13
	* Calculations are based on the 1985, 1990 and 2000 General Population Surveys in Turkey									

Appendix 31. Foreign Tourism Intensity Index values by provinces, 1985-2003

The change in top ten Foreign Tourism Intensity Index (FTII) by provinces and years																
1985				1990				2000				2003			
Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity
1	Antalya	Mediterran.	130.03	1	Antalya	Mediterran.	442.15	1	Antalya	Mediterran.	929.67	1	Antalya	Mediterran.	1404.33
2	Mugla	Aegean	85.50	2	Mugla	Aegean	226.48	2	Mugla	Aegean	552.27	2	Mugla	Aegean	876.12
3	Nevsehir	C.Anatolia	76.30	3	Aydin	Aegean	144.27	3	Aydin	Aegean	131.66	3	Aydin	Aegean	218.13
4	Aydin	Aegean	65.16	4	Nevsehir	C. Anatolia	92.58	4	Nevsehir	C. Anatolia	115.97	4	Nevsehir	C. Anatolia	131.10
5	Istanbul	Marmara	32.76	5	Balikesir	Marmara	60.16	5	Denizli	Aegean	41.05	5	Bolu	Black Sea	55.91
6	Izmir	Aegean	23.05	6	Istanbul	Marmara	36.27	6	Istanbul	Marmara	40.16	6	Denizli	Aegean	45.68
7	Balikesir	Marmara	17.51	7	Izmir	Aegean	26.14	7	Izmir	Aegean	36.36	7	Izmir	Aegean	43.09
8	Canakkale	Marmara	14.63	8	Canakkale	Marmara	19.30	8	Canakkale	Marmara	24.47	8	Canakkale	Marmara	20.92
9	Denizli	Aegean	9.61	9	Bursa	Marmara	14.86	9	Artvin	Black Sea	18.12	9	Istanbul	Marmara	12.84
10	Bursa	Marmara	9.45	10	Bolu	Black Sea	14.60	10	Ankara	C. Anatolia	12.62	10	Balikesir	Marmara	10.35
* Calculations are based on the 1985, 1990 and 2000 General Population Surveys in Turkey															

Appendix 32. Turkish Tourism Intensity Index Values by region

	The change in Turkish Tourism Intensity Index (TTII) by regions and years									
	Marmara	Aegean	Mediterran.	Central Anatolia	Black Sea	East Anatolia	S.East Anatolia	TOTAL	Coastal regions	Inner regions
1985	15.15	14.22	9.85	9.74	4.63	4.60	3.11	9.64	12.91	6.63
1990	16.98	18.81	15.70	12.25	6.21	3.89	3.08	12.18	16.50	7.98
2000	21.89	48.79	47.77	17.96	12.57	8.11	7.72	24.30	33.26	15.48
2003	22.53	43.82	45.37	19.28	14.15	7.83	8.20	23.94	32.38	15.65
	* Calculations are based on the 1985, 1990 and 2000 General Population Surveys in Turkey									

Appendix 33. Turkish Tourism Intensity Index values by provinces, 1985-2003

The change in Turkish Tourism Intensity Index (TTII) by provinces and years															
1985				1990				2000				2003			
Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity	Rank	Province	Region	Tourism Intensity
1	Mugla	Aegean	54.48	1	Mugla	Aegean	73.14	1	Antalya	Mediterran.	202.86	1	Mugla	Aegean	198.31
2	Antalya	Mediterran.	32.43	2	Antalya	Mediterran.	54.51	2	Mugla	Aegean	200.40	2	Antalya	Mediterran.	186.29
3	Balikesir	Marmara	30.35	3	Balikesir	Marmara	43.43	3	Bolu	Black Sea	131.73	3	Nevsehir	C. Anatolia	105.36
4	Bursa	Marmara	24.87	4	Bolu	Black Sea	34.58	4	Nevsehir	C. Anatolia	81.16	4	Bolu	Black Sea	98.87
5	Bolu	Black Sea	24.26	5	Bursa	Marmara	29.16	5	Aydin	Aegean	69.32	5	Aydin	Aegean	55.45
6	Edirne	Marmara	19.01	6	Ankara	C. Anatolia	24.95	6	Balikesir	Marmara	53.39	6	Canakkale	Marmara	49.66
7	Ankara	C. Anatolia	18.22	7	Aydin	Aegean	23.89	7	Canakkale	Marmara	44.98	7	Balikesir	Marmara	49.44
8	Izmir	Aegean	17.43	8	Nevsehir	C. Anatolia	22.23	8	Izmir	Aegean	43.21	8	Yalova	Marmara	44.73
9	Kutahya	Aegean	15.36	9	Edirne	Marmara	20.99	9	Denizli	Aegean	43.13	9	Tunceli	E. Anatolia	42.46
10	Eskisehir	C. Anatolia	15.07	10	Izmir	Aegean	19.95	10	Afyon	Aegean	35.19	10	Sinop	Black Sea	40.88
* Calculations are based on the 1985, 1990 and 2000 General Population Surveys in Turkey															

Appendix 34. Original series (Overall Arrivals -1980-2003)

	Monthly arrivals of foreign visitors to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	59590	51550	67229	91702	118998	118438	177183	207063	151540	127082	63460	54225	1288060
1981	63648	41171	65770	114700	131487	136056	174130	221180	172140	145093	73827	66009	1405211
1982	53597	55371	67566	111290	122811	137152	182980	216185	1600297	135973	75649	72846	2831717
1983	55837	51867	84942	113066	163439	141621	227185	227958	204837	158282	106227	89838	1625099
1984	65864	62574	90783	150301	181844	197145	302720	319910	266925	211228	142843	124957	2117094
1985	102277	108110	156620	199962	234629	255115	368155	369285	300206	242288	153709	124568	2614924
1986	79502	77964	138794	183026	232468	234671	316749	338922	277927	231265	151276	128521	2391085
1987	77471	90336	104774	230324	286026	321604	393697	456854	341125	265351	152242	135742	2855546
1988	112124	126104	200599	298998	451826	434021	595387	601334	543855	440128	205262	163089	4172727
1989	110814	126039	251539	345332	479623	443072	562218	633641	605991	462882	245840	192160	4459151
1990	115058	143215	242987	429624	529552	559266	707824	777793	667359	526115	367300	323215	5389308
1991	157674	157123	284039	376502	502029	517785	635835	761744	773458	581371	404267	366070	5517897
1992	208740	255040	337582	579022	739918	727002	970394	992640	861166	697642	370878	336072	7076096
1993	211573	273666	343780	578292	797637	682401	743819	784532	692967	699415	382736	309820	6500638
1994	267658	301811	394107	468550	644589	671333	820386	899189	773954	695471	392040	341530	6670618
1995	274680	302407	368195	535462	732394	810419	1008709	1070234	1054871	836025	393023	340467	7726886
1996	283616	324910	537452	556109	874942	902015	1106242	1153755	1117429	909397	452325	395893	8614085
1997	300872	314306	555204	639819	1020894	1045987	1206226	1404876	1297455	947462	538368	417535	9689004
1998	346183	371526	476756	642332	986237	1062961	1288439	1460075	1209256	1035237	502638	371057	9752697
1999	359046	371727	409483	426558	691313	784642	931895	1079249	876261	800513	435790	320808	7487285
2000	333915	354487	435158	721128	986376	1079148	1525718	1419244	1368538	1178481	602396	423564	10428153
2001	359320	404653	547365	884805	1231562	1387955	1776821	1601331	1440365	1065825	520962	398005	11618969
2002	306597	426405	675687	852930	1325752	1457615	1897112	1900120	1770566	1420386	662985	559873	13256028
2003	363983	481252	499663	669288	1146309	1510951	2130949	2275055	1874329	1657726	776181	643872	14029558
Average	194568	219734	305670	424963	608861	650766	835449	882174	843451	644610	340509	279156	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 35. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	46.3	42.0	59.6	92.2	112.1	114.0	159.1	185.6	150.4	118.3	63.8	56.6	100.0
1981	46,1	41,9	59,9	92,0	112,5	113,6	160,3	184,0	151,0	117,3	64,8	57,0	100,0
1982	45,8	41,6	60,8	92,1	112,4	113,4	161,5	180,7	152,5	115,7	66,4	57,9	100,1
1983	44,9	41,4	61,9	91,9	112,0	113,8	163,0	177,2	154,2	113,7	68,1	58,6	100,1
1984	43,5	40,8	63,6	91,6	112,5	115,1	164,3	174,9	153,9	112,2	69,3	58,7	100,0
1985	41,9	40,4	64,4	91,2	113,9	117,3	165,4	174,2	152,9	112,0	68,7	57,7	100,0
1986	40,0	39,7	65,3	91,5	116,5	119,7	164,4	174,3	151,9	113,6	67,2	56,0	100,0
1987	38,0	39,1	65,2	92,6	119,5	121,8	162,1	174,1	151,6	115,8	65,5	54,8	100,0
1988	36,4	38,6	65,3	93,6	122,3	123,0	159,0	173,5	151,8	117,2	65,1	54,5	100,0
1989	35,7	38,7	64,2	94,6	124,1	123,1	157,0	171,5	152,1	118,4	65,4	55,4	100,0
1990	35,6	39,7	63,8	95,3	124,3	123,1	154,3	168,4	152,0	119,8	66,9	56,7	100,0
1991	36,4	41,6	63,3	95,3	123,5	123,2	152,8	165,6	149,9	121,3	68,4	58,1	99,9
1992	37,8	44,0	63,1	94,0	121,8	124,1	151,3	163,9	148,5	122,7	69,1	58,6	99,9
1993	39,6	46,5	62,5	91,5	120,7	124,7	151,9	162,8	147,9	124,5	68,1	58,1	99,9
1994	41,0	48,2	62,3	88,3	120,6	125,5	151,6	162,4	149,5	126,6	66,8	56,5	99,9
1995	42,0	48,7	61,8	85,2	120,7	126,2	152,2	164,3	150,9	127,7	65,5	54,7	100,0
1996	42,3	48,3	61,4	82,7	120,3	127,2	152,6	167,4	152,7	128,0	64,7	52,7	100,0
1997	42,0	47,3	60,6	81,5	119,9	127,7	155,3	170,0	153,1	128,0	64,4	50,9	100,1
1998	41,0	46,2	59,5	82,0	119,5	128,8	158,6	171,3	152,7	127,6	64,2	48,9	100,0
1999	39,8	45,2	58,7	82,7	119,2	129,9	163,3	171,4	152,0	126,9	63,8	47,5	100,0
2000	38,5	44,4	57,9	83,6	117,9	131,3	168,3	171,4	151,8	126,0	62,6	46,5	100,0
2001	37,3	44,0	57,4	84,0	117,1	132,3	173,0	170,1	152,3	125,5	61,2	46,1	100,0
2002	36,2	43,7	57,1	84,2	116,4	133,2	176,2	169,4	152,9	124,8	60,0	45,9	100,0
2003	35,7	43,5	56,9	84,1	116,6	133,7	177,5	168,9	153,5	124,4	59,2	46,0	100,0
Average	40,2	43,2	61,5	89,1	118,2	123,6	160,6	171,6	151,8	121,2	65,4	53,9	

Appendix 36. Seasonal factors one year ahead

	Seasonal indices forecasted for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2004	35,5	43,4	56,7	84,1	116,7	133,9	178,2	168,6	153,8	124,1	58,8	46,0	100,0

Appendix 37. Original series (overall tourism receipts - 1980-2003)

	Monthly overall foreign tourism receipts inTurkey ($USA) (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	11800000	25700000	20900000	16300000	16200000	22200000	45000000	54100000	40100000	25500000	24300000	24500000	326600000
1981	18700000	17400000	20600000	25600000	30300000	40300000	43400000	55000000	39300000	34900000	30600000	25100000	381200000
1982	16600000	21300000	17100000	25800000	28600000	23800000	31800000	40400000	36000000	39300000	34100000	55500000	370300000
1983	22100000	26300000	23100000	26200000	43200000	30400000	33900000	58900000	41600000	40600000	29400000	35300000	411000000
1984	27800000	27100000	39400000	57200000	71300000	78700000	116800000	123400000	105800000	81500000	57300000	53100000	839400000
1985	94400000	88400000	124200000	165600000	137300000	133600000	180700000	229000000	120000000	101200000	59100000	48100000	1481600000
1986	42700000	36600000	55200000	92200000	114300000	128200000	149500000	188500000	163500000	101400000	87100000	55900000	1215100000
1987	56700000	56500000	65500000	128900000	150300000	171800000	203500000	276300000	226400000	193700000	108400000	83000000	1721000000
1988	85700000	73200000	104500000	155900000	213400000	260000000	285800000	360200000	321500000	275600000	124700000	94800000	2355300000
1989	68700000	58900000	108200000	148400000	266500000	282800000	315600000	387300000	368100000	333500000	134600000	83900000	2556500000
1990	85000000	79000000	130000000	339000000	360000000	296000000	320000000	499000000	435000000	339000000	184000000	159000000	3225000000
1991	84000000	86000000	126000000	144000000	186000000	250000000	320000000	434000000	384000000	308000000	201000000	131000000	2654000000
1992	95000000	126000000	166000000	252000000	369000000	398000000	465000000	578000000	502000000	418000000	159000000	111000000	3639000000
1993	100000000	115000000	158000000	300000000	462000000	448000000	469000000	527000000	463000000	520000000	239000000	158000000	3959000000
1994	134000000	136000000	171000000	249000000	340000000	409000000	497000000	673000000	632000000	601000000	294000000	185000000	4321000000
1995	164000000	155000000	183000000	279000000	419000000	559000000	632000000	837000000	734000000	595000000	225000000	175000000	4957000000
1996	185200000	177300000	242800000	340300000	426000000	483100000	729700000	948600000	805400000	918400000	407400000	297900000	5962100000
1997	227600000	176400000	293600000	490500000	745600000	844800000	941800000	1362000000	1264000000	1023700000	415600000	302900000	8088500000
1998	343800000	264800000	390800000	315200000	490300000	603700000	834600000	1431200000	1192500000	1133400000	512100000	296500000	7808900000
1999	196000000	186000000	224000000	255000000	422000000	509000000	618000000	863000000	696000000	696000000	313000000	225000000	5203000000
2000	217000000	216000000	302000000	422000000	662000000	749000000	1054000000	1207000000	1056000000	984000000	476000000	291000000	7636000000
2001	326500000	322300000	447900000	641300000	944700000	1130700000	1387000000	1646100000	1420300000	1060800000	481000000	257900000	10066500000
2002	256300000	321100000	494600000	592400000	997300000	1125500000	1575600000	2349200000	1910800000	1243300000	610700000	424100000	11900900000
2003	377400000	417800000	406100000	441700000	773000000	1044200000	1810700000	2879500000	2341600000	1453800000	767300000	490000000	13203100000
Avge	134875000	133754167	179770833	245979166,7	361179166,7	417575000	544183333,3	750320833,3	637454166,7	521733333,3	248945833,3	169312500	

Source: 1- Central Bank 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation
* The tourism receipts in 1996-1998 are the combination of receipts calculated by Ministry of Tourism and State Institute of Statistics

Appendix 38. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly overall foreign tourism receipts inTurkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	59.8	70.2	70.4	82.0	104.6	90.3	134.7	171.6	128.1	109.5	93.4	85.2	100.0
1981	60,0	69,3	70,2	82,5	105,2	92,1	135,4	171,5	128,3	108,8	91,1	84,1	99,9
1982	60,4	67,9	69,0	86,1	105,6	95,2	135,8	172,9	127,1	109,4	87,7	81,3	99,9
1983	59,9	65,3	67,6	90,6	106,6	100,0	137,5	173,7	127,9	109,5	83,8	76,2	99,9
1984	58,7	61,9	65,4	94,6	107,6	105,5	138,9	178,0	130,2	110,7	78,9	69,8	100,0
1985	56,4	56,7	63,5	95,7	108,5	111,8	142,3	180,8	136,4	112,4	74,4	62,9	100,2
1986	53,3	51,6	61,1	94,8	109,5	117,2	144,3	184,1	143,2	117,7	70,6	56,8	100,3
1987	49,4	46,2	58,5	91,9	112,7	121,5	143,4	184,0	151,4	124,5	69,4	52,2	100,4
1988	45,2	42,7	56,4	87,0	116,0	123,3	141,4	185,4	158,1	130,6	69,0	49,9	100,4
1989	41,6	39,8	55,4	82,0	118,4	124,0	140,6	185,5	163,4	134,6	69,6	48,7	100,3
1990	38,5	38,9	54,8	79,2	118,5	124,2	141,6	185,6	164,4	137,9	70,6	48,0	100,2
1991	36,9	38,7	54,4	78,3	117,4	123,9	141,9	184,9	164,3	140,6	72,5	47,3	100,1
1992	36,6	39,2	53,5	77,7	113,7	124,8	143,2	184,6	163,6	142,9	73,9	46,7	100,0
1993	37,7	39,8	52,5	77,1	108,6	124,1	144,6	185,0	163,3	147,3	74,3	46,5	100,1
1994	38,8	40,2	51,0	75,7	104,3	123,6	145,2	185,6	164,5	152,0	73,3	46,7	100,1
1995	40,0	40,3	49,8	74,1	101,4	119,9	143,4	189,4	167,4	156,7	72,5	47,3	100,2
1996	40,1	39,9	48,6	71,2	99,8	117,5	141,9	194,9	170,3	158,3	71,3	47,4	100,1
1997	39,9	39,6	48,4	68,8	99,2	114,8	142,8	199,3	171,2	159,5	70,6	46,9	100,1
1998	39,1	38,9	48,1	67,5	100,2	115,6	145,1	200,8	171,6	157,5	69,0	46,0	99,9
1999	39,0	38,5	48,6	66,7	101,2	115,9	148,5	203,0	172,0	153,0	67,8	45,0	99,9
2000	39,1	37,9	48,7	65,9	102,2	117,0	153,1	204,9	174,8	145,1	66,0	43,7	99,9
2001	39,6	37,6	49,0	65,9	102,5	116,2	158,1	206,6	177,5	138,1	64,8	42,7	99,9
2002	40,0	37,5	48,9	66,4	102,8	115,4	161,4	207,2	181,5	132,3	63,5	42,1	99,9
2003	40,4	37,6	48,9	66,9	102,9	114,7	162,0	208,2	183,9	129,4	62,9	42,0	100,0
Avge	45,4	46,5	55,9	78,7	107,1	114,5	144,5	188,6	157,7	134,1	73,4	54,4	.

Appendix 39. Seasonal factors, one year ahead

	Seasonal indices for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avge
2004	40,6	37,6	49,0	67,1	102,9	114,3	162,3	208,7	185,1	128,0	62,6	42,0	100,0

Appendix 40. Original series (average foreign tourism receipts per visitor -1980-2003)

	Monthly average foreign tourism receipts per visitor inTurkey ($USA) (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	198.0	498.5	310.9	177.7	136.1	187.4	254.0	261.3	264.6	200.7	382.9	451.8	3324.0
1981	293.8	422.6	313.2	223.2	230.4	296.2	249.2	248.7	228.3	240.5	414.5	380.3	3541.0
1982	309.7	384.7	253.1	231.8	232.9	173.5	173.8	186.9	224.6	289.0	450.8	761.9	3672.6
1983	395.8	507.1	272.0	231.7	264.3	214.7	149.2	258.4	203.1	256.5	276.8	392.9	3422.4
1984	422.1	433.1	434.0	380.6	392.1	399.2	385.8	385.7	396.4	385.8	401.1	424.9	4840.9
1985	923.0	817.7	793.0	828.2	585.2	523.7	490.8	620.1	399.7	417.7	384.5	386.1	7169.7
1986	537.1	469.4	397.7	503.8	491.7	546.3	472.0	556.2	588.3	438.5	575.8	434.9	6011.6
1987	731.9	625.4	625.2	559.6	525.5	534.2	516.9	604.8	663.7	730.0	712.0	611.5	7440.6
1988	764.3	580.5	520.9	521.4	472.3	599.0	480.0	599.0	591.2	626.2	607.5	581.3	6943.7
1989	620.0	467.3	430.2	429.7	555.6	638.3	561.3	611.2	607.4	720.5	547.5	436.6	6625.7
1990	738.8	551.6	535.0	789.1	679.8	529.3	452.1	641.6	651.8	644.3	501.0	491.9	7206.2
1991	532.7	547.3	443.6	382.5	370.5	482.8	503.3	569.7	496.5	529.8	497.2	357.9	5713.8
1992	455.1	494.0	491.7	435.2	498.7	547.5	479.2	582.3	582.9	599.2	428.7	330.3	5924.8
1993	472.7	420.2	459.6	518.8	579.2	656.5	630.5	671.7	668.1	743.5	624.5	510.0	6955.3
1994	500.6	450.6	433.9	531.4	527.5	609.2	605.8	748.5	816.6	864.2	749.9	541.7	7379.9
1995	597.1	512.6	497.0	521.0	572.1	689.8	626.5	782.1	695.8	711.7	572.5	514.0	7292.2
1996	653.0	545.7	451.8	611.9	486.9	535.6	659.6	822.2	720.8	1009.9	900.7	752.5	692.1
1997	756.5	561.2	528.8	766.6	730.3	807.7	780.8	969.5	974.2	1080.5	772.0	725.4	834.8
1998	993,1	712,7	819,7	490,7	497,1	567,9	647,8	980,2	986,1	1094,8	1018,8	799,1	800,7
1999	545,9	500,4	547,0	597,8	610,4	648,7	663,2	799,6	794,3	869,4	718,2	701,4	694,9
2000	649,9	609,3	694,0	585,2	671,1	694,1	690,8	850,5	771,6	835,0	790,2	687,0	732,2
2001	908,7	796,5	818,3	724,8	767,1	814,7	780,6	1028,0	986,1	995,3	923,3	648,0	908,7
2002	836,0	753,0	732,0	694,5	752,3	772,2	830,5	1236,3	1079,2	875,3	921,1	757,5	836,0
2003	1036,9	868,2	812,7	660,0	674,3	691,1	849,7	1265,7	1249,3	877,0	988,6	761,0	1036,9
Avge	693,2	608,7	588,1	578,8	593,2	641,7	651,4	850,5	755,8	809,4	731,1	606,5	

Source: 1- Central Bank 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation
* The tourism receipts in 1996 and 1998 are the combination of receipts calculated by Ministry of Tourism and State Institute of Statistics

Appendix 41. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly average foreign tourism receipts per visitor in Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	106.0	147.7	105.1	78.0	85.7	78.0	80.1	82.5	80.3	82.7	131.9	140.1	99.8
1981	108,0	146,4	104,7	78,9	86,5	78,9	80,6	83,1	80,2	82,7	127,2	137,2	99,5
1982	113,5	143,4	104,0	81,6	87,8	81,1	81,1	84,1	79,8	84,7	120,0	130,5	99,3
1983	120,6	138,1	103,3	86,2	90,1	83,7	81,7	85,6	81,6	87,0	112,1	122,0	99,3
1984	127,2	132,1	102,5	90,1	91,6	86,5	82,9	88,8	85,0	91,3	105,1	113,3	99,7
1985	130,8	123,6	102,1	93,1	91,8	89,9	84,4	92,6	90,7	95,2	101,5	106,7	100,2
1986	131,1	114,6	100,4	93,0	91,1	94,2	86,3	96,8	96,2	101,4	101,0	100,9	100,6
1987	128,7	105,6	96,0	92,4	91,7	98,2	87,9	100,2	101,7	107,4	102,1	97,0	100,7
1988	124,0	99,1	91,7	89,5	92,7	100,8	91,0	104,5	105,5	113,1	102,4	93,4	100,6
1989	117,8	94,5	88,9	86,9	93,8	103,3	94,2	108,8	108,9	116,5	101,3	90,2	100,4
1990	111,7	91,4	88,3	84,8	95,0	105,2	98,0	112,4	110,8	119,5	100,1	86,4	100,3
1991	106,0	89,6	87,4	85,3	96,1	106,0	100,0	114,8	113,5	121,4	99,8	84,0	100,3
1992	100,6	87,7	86,7	87,1	95,6	106,1	101,3	116,8	115,1	122,8	101,1	82,6	100,3
1993	97,2	86,8	85,0	90,0	93,4	104,7	100,8	118,3	116,2	124,8	103,5	83,9	100,4
1994	96,1	84,7	81,7	92,6	91,1	103,0	100,1	119,1	116,1	127,3	105,3	86,3	100,3
1995	97,3	83,8	78,3	94,4	89,1	99,1	98,2	119,8	116,6	129,9	107,2	89,8	100,3
1996	98,7	83,0	75,9	94,4	87,4	96,0	96,8	120,7	116,7	130,8	107,6	92,9	100,1
1997	99,6	84,3	76,6	92,7	86,5	92,9	95,5	121,4	116,4	130,8	108,1	94,9	100,0
1998	100,4	85,1	78,9	90,0	87,0	92,2	94,7	121,1	116,2	129,2	107,7	95,0	99,8
1999	100,8	87,0	82,8	87,1	87,8	91,6	93,9	121,6	116,5	126,1	108,0	93,3	99,7
2000	101,5	89,0	86,4	84,2	88,0	92,0	94,0	123,1	117,3	122,2	107,6	90,7	99,7
2001	102,5	91,3	89,7	82,3	87,3	91,3	94,7	125,5	117,9	118,2	108,0	88,2	99,7
2002	104,0	92,9	91,4	81,2	86,1	90,6	95,1	127,7	119,3	115,6	108,1	86,2	99,9
2003	104,9	94,1	92,1	80,8	85,1	89,3	95,0	129,7	120,9	113,8	108,3	85,3	100,0
Avge	109,5	103,2	90,8	87,4	89,9	93,9	92,0	109,1	105,8	112,3	107,7	98,8	.

Appendix 42. Seasonal factors, one year ahead

	Seasonal indices for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avge
2004	105,4	94,7	91,8	80,8	84,4	88,5	95,1	130,9	122,0	113,2	108,2	85,2	100,0

Appendix 43. Original series (by air)

	Monthly arrivals of foreign visitors to Turkey by air (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	21480	20661	24055	22513	25660	26956	38500	42792	32004	23011	17584	16830	312046
1981	14495	13816	21215	29036	37496	37269	45501	46906	42821	36034	22958	18175	365722
1982	17353	17429	27947	35083	44911	42980	49525	47952	37487	31888	22168	20549	395272
1983	17399	17612	33447	39035	54525	46265	71971	63887	57702	48883	51365	41069	543160
1984	24280	24846	38526	50163	60082	68722	95072	91318	84301	63450	43461	39698	683919
1985	34449	34468	52410	64628	83877	95042	116590	118362	107900	73035	47375	40227	868363
1986	31465	34279	61999	67677	108329	106540	130212	127317	118675	87185	48056	43285	965019
1987	39504	40819	55081	126474	167883	183029	196365	211971	159913	114723	64740	54208	1414710
1988	54747	56823	98683	148261	259285	251701	328043	292498	295073	193467	68644	65760	2112985
1989	50726	54622	118449	184914	301319	271218	318478	327308	348338	229497	74043	65804	2344716
1990	52668	59782	103641	244437	311176	319430	392989	396621	348526	196877	68609	64011	2558767
1991	27657	21051	47657	67925	151749	179439	274414	316131	324222	171831	56784	61243	1700103
1992	47930	55002	67653	217090	361991	363534	381821	504924	481646	318285	85157	92486	2977519
1993	72511	97640	147435	317877	508330	404321	429188	436947	377747	400183	178320	156034	3526533
1994	128287	151439	220780	254400	390950	437085	532225	550293	469640	432521	217021	166592	3951233
1995	139005	159736	213199	357580	490130	588419	738350	761723	747984	543869	217274	206771	5164040
1996	174583	227860	390758	378209	630212	680072	845405	864201	860865	625480	291626	270654	6239925
1997	187871	213784	409563	461988	776401	793329	903599	1052187	975543	646495	336350	262619	7019729
1998	194692	233769	299828	438549	692038	763304	920758	1073285	842756	691060	317461	231382	6698882
1999	235419	224490	219904	212468	343531	464188	522519	776713	566991	584886	248854	156596	4556559
2000	169577	195160	261699	508163	690572	799258	1148774	1013469	1004254	830190	376143	276803	7274062
2001	235856	280860	397563	688186	943288	1051832	1310167	1154743	1076556	744600	330411	245530	8459592
2002	202825	277893	472119	634255	1034029	1148724	1448793	1461514	1402952	1086746	455452	365152	9990454
2003	215044	333098	320343	456803	849906	1140055	1578663	1682228	1391532	1192580	517610	402394	10080256
Average	99576	118622	170998	250238	388236	427613	534080	558970	506476	390282	173228	140161	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 44. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors to Turkey by air (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	52.9	50.0	78.3	101.1	131.1	120.5	154.9	154.8	127.5	101.8	68.2	59.3	100.0
1981	52,6	49,9	77,9	100,5	130,7	120,7	156,3	154,4	128,6	102,3	68,0	59,2	100,1
1982	51,8	49,7	77,1	99,0	129,3	122,5	158,1	153,8	130,9	103,3	67,6	58,4	100,1
1983	50,4	49,1	75,8	96,5	128,3	125,0	160,3	154,7	134,3	103,7	66,5	57,3	100,2
1984	48,4	47,8	73,7	93,5	128,1	128,6	162,2	156,6	139,6	104,7	64,0	54,7	100,2
1985	46,0	45,8	70,8	90,5	129,9	131,7	164,7	159,9	146,1	105,2	59,9	51,5	100,2
1986	42,9	42,8	67,7	88,6	132,8	135,2	165,8	163,2	154,2	107,2	54,9	47,2	100,2
1987	39,0	39,2	63,9	87,8	136,7	138,0	167,8	167,1	161,4	108,9	49,6	43,4	100,2
1988	34,8	35,6	59,5	87,9	138,8	139,5	170,2	172,4	169,3	110,3	44,5	40,0	100,2
1989	31,2	32,5	55,2	88,6	139,7	139,4	171,8	178,0	175,9	111,4	40,5	38,0	100,2
1990	28,5	30,7	52,1	90,6	138,5	138,8	170,2	181,3	181,2	113,0	39,0	37,3	100,1
1991	27,4	30,9	51,0	91,6	136,4	138,4	167,4	181,7	181,7	115,2	40,1	38,2	100,0
1992	28,0	32,6	51,3	92,0	132,4	138,1	164,7	179,5	180,2	117,6	42,6	39,8	99,9
1993	30,1	35,5	53,1	90,1	129,4	137,9	162,7	176,0	176,2	120,2	45,8	42,0	99,9
1994	32,4	38,2	54,9	88,3	127,4	137,2	161,1	171,9	172,5	121,8	49,5	44,1	99,9
1995	34,4	40,5	56,3	84,7	126,1	136,6	161,2	171,6	167,8	122,2	53,1	46,0	100,0
1996	35,4	41,5	55,9	82,4	124,9	135,5	161,4	174,6	164,5	122,6	55,5	46,5	100,1
1997	35,6	41,5	55,0	81,1	124,6	134,6	162,4	177,7	161,7	124,0	56,8	46,0	100,1
1998	35,1	40,6	53,6	82,6	124,9	134,4	163,7	178,2	160,2	125,1	57,4	44,5	100,0
1999	34,4	39,9	52,6	83,8	124,6	135,0	167,4	177,0	159,0	126,2	57,4	43,2	100,0
2000	33,3	39,5	51,2	85,2	123,4	136,2	171,3	176,3	158,4	126,9	56,4	41,9	100,0
2001	32,3	39,6	49,8	86,0	122,0	137,6	176,4	174,9	158,5	126,7	55,2	41,3	100,0
2002	31,3	39,8	48,7	86,4	120,8	138,9	179,8	174,7	159,0	125,3	54,2	41,0	100,0
2003	30,9	39,9	48,3	86,3	120,5	139,7	181,6	174,5	159,5	124,0	53,7	40,9	100,0
Average	37,5	40,5	59,7	89,4	129,2	134,2	166,0	170,2	158,7	115,4	54,2	45,9	,
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 45. Seasonal factors, one year ahead

	Seasonal indices for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avge
2004	30.6	39.9	48.2	86.3	120.3	140.0	182.5	174.4	159.8	123.4	53.4	40.9	100.0

Appendix 46. Original series (by road)

	Monthly arrivals of foreign visitors to Turkey by road (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	27708	23941	27694	32335	33465	37197	53824	74624	41649	46803	29630	25446	454316
1981	30965	20027	31430	47071	39710	47265	64953	84928	54253	51064	38497	36044	546207
1982	29488	31048	29327	43327	38580	46653	73274	93421	63337	54249	35494	40336	578534
1983	28602	25693	37475	34952	50540	43423	67181	89357	64700	50112	34632	35953	562620
1984	34872	31162	39586	55048	60146	71308	127820	131643	96972	82878	79679	71966	883080
1985	61697	66517	82875	84047	84335	96213	165672	160883	105732	102806	86628	72928	1170333
1986	40741	34440	62273	79542	74766	72847	115075	128128	80868	82675	84850	74142	930347
1987	31270	40812	38046	63537	59576	68099	103886	133661	78425	68759	63860	64124	814055
1988	43002	58120	81460	103320	109206	95572	158337	166580	129226	151152	106138	82065	1284178
1989	49750	59330	109379	108796	98304	83591	135155	153357	123862	126175	136461	108757	1292917
1990	50053	68608	112645	125931	121663	144178	177824	219011	192160	223219	256805	236153	1928250
1991	113880	122656	217022	276888	297920	277937	277117	345595	352514	327612	318770	278587	3206498
1992	146514	185215	245550	308057	298530	288200	478302	346430	246998	290013	257439	219837	3311085
1993	124952	163324	174218	207300	212192	190121	205960	219369	181574	173453	162884	135570	2150917
1994	123490	132782	146791	147297	155183	134762	169946	208132	166536	147726	138398	153592	1824635
1995	122859	126175	135054	124210	159516	127544	142592	151709	153178	148462	125995	108927	1626221
1996	87079	76148	115173	110921	136784	114211	123058	142064	110532	135989	112976	95393	1360328
1997	83077	75184	114063	116284	125696	126838	159340	195858	151306	157706	152705	117981	1576038
1998	123634	113453	146344	136056	152122	153875	201386	197662	175743	169889	138904	119452	1828520
1999	81801	88421	130389	98279	119733	123222	147991	197608	179487	172058	152919	158455	1650363
2000	146232	137659	145830	151377	183073	164137	211565	200208	184324	166376	155254	123544	1969579
2001	109590	111874	125592	129454	152900	161009	247825	241755	205844	190610	150130	139115	1965698
2002	92641	137904	181472	180341	205527	217978	317083	297592	242683	228090	181725	182068	2465104
2003	138682	139074	163670	178160	209196	247023	363210	384535	325510	301264	219080	224464	2893868
Average	80107	86232	112223	122605	132444	130550	178682	190171	154476	152048	134161	121037	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 47. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors to Turkey by road (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	67.1	59.5	69.8	89.1	85.6	98.9	145.6	192.1	121.9	113.5	77.8	79.6	100.1
1981	66,3	59,2	70,3	88,8	86,0	98,8	147,4	190,9	122,7	112,2	78,7	79,1	100,0
1982	64,9	59,2	71,5	88,5	86,1	98,5	151,0	187,6	123,5	110,2	81,0	78,9	100,1
1983	62,3	59,6	72,5	89,1	86,8	98,0	155,2	183,0	122,6	108,4	84,8	79,0	100,1
1984	58,9	59,9	75,0	89,8	87,7	97,6	157,6	178,1	120,7	107,0	90,1	79,0	100,1
1985	55,3	60,5	77,0	91,8	90,0	96,9	158,1	172,6	117,5	106,5	95,4	79,1	100,0
1986	52,6	61,1	79,8	94,5	92,2	95,5	155,4	166,6	114,8	107,3	101,2	80,4	100,1
1987	50,1	61,4	82,2	98,3	94,4	94,4	149,2	160,0	113,1	108,9	106,6	82,9	100,1
1988	48,2	61,4	84,9	101,1	96,5	94,1	141,2	152,9	113,4	110,5	110,7	86,2	100,1
1989	47,4	61,5	86,5	103,4	99,1	95,1	133,8	145,2	113,5	112,1	112,7	89,2	99,9
1990	48,3	62,9	87,3	104,5	101,6	96,6	127,8	137,9	113,0	113,1	112,9	92,0	99,8
1991	50,2	65,1	88,3	104,8	103,6	98,4	122,6	133,2	110,9	113,8	111,8	93,6	99,7
1992	53,7	68,5	88,7	103,3	106,1	99,4	118,7	129,6	110,4	113,7	109,2	93,7	99,6
1993	58,3	71,2	89,9	100,9	108,5	99,3	115,9	128,3	109,3	114,7	106,0	92,7	99,6
1994	63,5	73,0	91,1	98,3	109,9	98,2	114,2	128,5	109,3	115,3	104,2	90,8	99,7
1995	68,3	73,1	93,1	95,4	108,9	97,3	114,2	129,8	109,1	116,4	103,4	89,3	99,9
1996	72,0	72,7	93,9	91,9	106,8	96,7	116,3	131,0	111,3	116,5	102,5	88,2	100,0
1997	74,3	71,9	93,5	89,4	104,1	96,9	120,0	132,1	112,9	116,4	101,8	87,7	100,1
1998	75,1	71,6	91,5	87,3	100,9	97,4	125,5	134,2	115,3	114,9	100,2	86,5	100,0
1999	75,0	72,0	89,5	85,9	98,2	97,9	131,8	135,9	117,3	113,4	97,8	86,0	100,1
2000	74,1	72,3	87,1	84,5	96,6	98,7	137,7	138,1	119,5	112,0	94,6	85,4	100,0
2001	72,9	72,4	85,2	84,0	96,2	99,9	141,6	139,4	120,3	111,5	92,4	84,7	100,0
2002	71,7	71,9	83,8	84,1	96,0	100,9	144,3	141,5	120,4	111,0	90,7	83,5	100,0
2003	71,3	71,7	83,3	84,4	95,8	101,4	145,7	142,2	120,2	111,0	89,7	82,7	100,0
Average	62,6	66,4	84,0	93,0	97,4	97,8	136,3	150,4	115,9	112,1	98,2	85,4	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 48. Seasonal factors, one year ahead

	Seasonal indices for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avge
2004	71,1	71,7	83,1	84,5	95,8	101,6	146,5	142,5	120,1	110,9	89,3	82,4	99,9

Appendix 49. Original series (by sea)

	Monthly arrivals of foreign visitors to Turkey by sea (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	2569	2762	2790	29214	52712	47270	75029	76352	67854	43577	10371	6687	417187
1981	1580	2478	6024	31173	48471	46886	57437	79406	67334	52138	7603	7027	407557
1982	3772	4435	7363	29654	35755	43988	54326	66174	53523	44517	14669	6999	365175
1983	5618	4955	9361	34772	54212	48144	64796	66281	75820	53803	16697	8826	443285
1984	4691	4516	10180	42138	58752	54771	73727	89922	80880	60838	16975	9580	506970
1985	3698	4476	18056	47552	63494	60171	78844	81832	79832	61684	15323	7717	522679
1986	4680	6171	9913	30682	46030	51862	65338	75592	73277	57781	14440	6289	442055
1987	3980	5397	8546	35833	55675	66357	84287	99756	95623	75908	18957	14045	564364
1988	11352	7307	16386	43681	79562	83445	99684	130411	112416	87960	25875	10484	708563
1989	7154	7692	19419	46586	76048	83780	100875	140755	124791	99697	28074	10602	745473
1990	6702	6832	15963	48111	86999	85243	117902	141687	114337	94579	29447	9646	757448
1991	6320	7062	8684	20965	42350	49670	72263	87516	87615	72995	21336	18512	495288
1992	10453	12296	19840	47496	73168	69581	96777	131291	125671	82844	23105	18749	711271
1993	10637	9452	17488	49982	73912	84623	104441	123881	130283	122756	38757	15505	781717
1994	13588	14713	22555	61392	91935	93225	108443	132789	131522	111620	33106	17928	832816
1995	10874	14632	17920	51442	79803	90057	120164	146896	146644	141338	44506	20224	884500
1996	17525	16369	25545	61600	99949	100789	128082	137123	136431	137761	39151	21578	921903
1997	17865	15902	21444	52788	106146	116085	130638	142668	156833	128915	37515	26366	953165
1998	17931	13742	18951	57735	131036	136559	156101	179291	181623	165635	39246	13230	1111080
1999	12620	9081	22209	48090	89123	93132	106551	138492	134702	116475	36532	20234	827241
2000	15935	19366	24834	58457	109946	112259	160498	199659	175909	178787	68182	21013	1144845
2001	11978	10107	21519	64322	132034	169701	206488	195938	152140	125882	37350	10406	1137865
2002	8980	8087	19009	34373	82231	85937	119321	132456	119976	101650	23013	9943	744976
2003	7917	6813	12579	31664	84110	119260	176669	198947	149398	157645	34853	12475	992330
Average	9101	8943	15691	44154	77227	83033	106612	124796	115601	99033	28128	13503	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 50. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors to Turkey by sea (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	11.5	12.5	21.8	95.4	139.9	137.5	179.3	212.7	188.7	139.7	39.8	21.1	100.0
1981	11,5	12,5	22,2	95,9	140,4	136,8	178,9	211,0	189,5	139,8	39,9	21,2	100,0
1982	11,7	12,6	23,0	97,0	140,3	136,1	177,7	208,0	190,2	141,6	40,4	21,2	100,0
1983	11,8	12,7	24,2	97,3	138,4	136,1	177,3	205,6	190,7	144,1	40,8	21,0	100,0
1984	11,9	12,9	25,3	96,2	136,6	136,4	177,2	202,2	192,5	147,1	41,2	20,7	100,0
1985	12,0	12,9	26,2	93,1	134,6	137,1	177,2	202,9	193,8	149,2	41,3	20,1	100,0
1986	12,0	13,0	27,0	89,0	132,5	137,8	175,5	205,7	195,0	151,7	41,8	19,6	100,1
1987	12,0	13,0	27,6	84,1	130,1	138,2	173,8	210,9	194,3	154,2	43,4	19,0	100,1
1988	12,1	13,3	28,2	80,1	127,7	137,5	173,3	214,0	194,2	155,5	45,5	19,0	100,0
1989	12,6	13,9	28,6	77,4	126,1	134,4	172,5	217,2	195,0	155,1	47,5	19,4	100,0
1990	13,5	14,8	29,1	76,9	123,8	131,2	171,3	216,4	196,5	156,2	49,3	20,1	99,9
1991	14,8	15,9	29,5	77,5	122,6	128,4	169,2	213,1	197,9	158,4	50,8	21,1	99,9
1992	16,2	17,1	29,7	78,8	120,8	127,7	167,4	207,3	198,2	161,9	51,9	22,2	99,9
1993	17,7	18,1	29,8	79,4	120,9	127,5	165,4	202,1	197,4	165,6	52,3	23,3	100,0
1994	19,0	18,7	29,7	78,8	121,7	129,6	163,9	196,1	195,9	170,3	52,2	24,1	100,0
1995	19,9	18,8	29,2	76,5	124,7	132,2	163,2	191,5	194,1	174,2	51,5	24,7	100,1
1996	20,3	18,3	28,4	73,6	127,3	135,5	163,8	189,7	193,1	175,4	50,5	24,8	100,1
1997	20,3	17,4	27,7	70,4	129,4	136,6	165,2	192,0	192,9	175,7	49,1	24,7	100,1
1998	19,5	16,1	26,7	67,8	130,3	138,9	168,8	195,8	191,9	173,6	48,0	24,0	100,1
1999	18,2	14,6	26,1	65,1	130,3	139,9	174,0	200,9	190,6	172,4	46,7	22,9	100,1
2000	16,4	13,2	25,2	62,4	128,7	141,8	181,4	207,3	187,7	170,1	45,5	21,4	100,1
2001	15,0	12,3	24,7	59,6	126,4	142,2	189,1	212,9	184,5	170,3	44,1	20,0	100,1
2002	14,0	11,8	24,0	57,2	124,4	144,3	195,9	216,0	181,3	169,4	43,1	18,8	100,0
2003	13,5	11,6	23,7	55,8	123,9	145,6	199,4	216,5	179,8	169,0	42,6	18,2	100,0
Average	14,9	14,5	26,6	78,6	129,2	136,2	175,0	206,2	191,9	160,0	45,8	21,4	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 51. Seasonal factors, one year ahead

	Seasonal indices for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avge
2004	13,3	11,5	23,6	55,1	123,7	146,3	201,1	216,7	179,1	168,8	42,3	17,9	99,9

Appendix 52. Original series (by rail)

	Monthly arrivals of foreign visitors to Turkey by rail (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	7833	4186	6690	7640	7161	7015	9830	13295	10033	13691	5875	5262	98511
1981	16608	4850	7101	7420	5810	4636	6239	10040	7732	5857	4769	4763	85825
1982	2984	2459	2929	3226	3565	3531	5855	8638	5950	5319	3318	4962	52736
1983	4218	3607	4659	4307	4162	3789	23237	8433	6615	5484	3533	3990	76034
1984	2021	2050	2491	2952	2864	2344	6101	7027	4772	4062	2728	3713	43125
1985	2433	2649	3279	3735	2923	3689	7049	8208	6742	4763	4383	3696	53549
1986	2616	3074	4609	5125	3343	3422	6124	7885	5107	3624	3930	4805	53664
1987	2717	3308	3101	4480	2892	4119	9159	11466	7164	5961	4685	3365	62417
1988	3023	3854	4070	3736	3773	3303	9323	11845	7140	7549	4605	4780	67001
1989	3184	4395	4292	5036	3952	4483	7710	12221	9000	7513	7262	6997	76045
1990	5635	7993	10738	11145	9714	10415	19109	20474	12336	11440	12439	13405	144843
1991	9817	6354	10676	10724	10010	10739	12041	12502	9107	8933	7377	7728	116008
1992	3843	2527	4539	6379	6229	5687	13494	9995	6851	6500	5177	5000	76221
1993	3473	3250	4639	3133	3203	3336	4230	4335	3363	3023	2775	2711	41471
1994	2293	2877	3981	5461	6521	6261	9772	7975	6256	3604	3515	3418	61934
1995	1942	1864	2022	2230	2945	4399	7603	9906	7065	2356	5248	4545	52125
1996	4429	4533	5976	5379	7997	6943	9697	10367	9601	10167	8572	8268	91929
1997	12059	9436	10134	8759	12651	9735	12649	14163	13773	14346	11798	10569	140072
1998	9926	10562	11633	9992	11041	9223	10194	9837	9134	8653	7027	6993	114215
1999	5833	4209	5597	3617	4275	3631	4523	5586	4431	4013	3390	3979	53084
2000	2171	2302	2795	3131	2785	3494	4881	5908	4051	3128	2817	2204	39667
2001	1896	1812	2691	2843	3340	5413	12341	8895	5825	4733	3071	2954	55814
2002	2151	2521	3087	3961	3965	4976	11915	8558	4955	3900	2795	2710	55494
2003	2340	2267	3071	2661	3097	4613	12407	9345	7889	6237	4638	4539	63104
Average	4810	4039	5200	5295	5342	5383	9812	9871	7287	6452	5239	5223	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 53. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors to Turkey by rail (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	80.3	57.3	80.6	87.3	82.9	77.5	142.4	174.4	131.9	114.3	71.9	100.1	100.1
1981	79,3	57,6	80,0	86,7	82,5	76,4	145,2	175,6	132,1	114,2	72,4	99,8	100,1
1982	76,3	58,9	79,4	85,8	80,9	75,3	149,5	177,6	133,6	113,1	74,3	97,8	100,2
1983	71,8	60,3	78,0	86,3	79,2	75,1	152,5	181,8	134,2	110,3	77,2	94,9	100,1
1984	67,5	62,6	76,7	87,9	75,7	75,5	156,0	185,3	134,6	107,3	81,1	91,3	100,1
1985	63,8	64,3	75,1	90,7	72,8	76,5	157,8	190,0	132,6	104,0	83,6	88,5	100,0
1986	61,0	67,2	74,8	93,3	69,7	77,8	157,9	192,7	131,3	101,4	85,8	85,7	99,9
1987	58,6	70,0	76,0	95,5	69,4	79,6	155,8	194,0	127,3	98,8	87,3	85,1	99,8
1988	57,7	72,6	78,9	96,0	71,3	82,5	153,0	189,5	123,0	98,9	88,7	86,3	99,9
1989	57,0	73,1	82,1	96,1	76,3	85,1	151,4	181,9	117,5	99,5	89,3	89,0	99,9
1990	57,1	72,6	86,1	94,8	82,0	89,3	149,0	172,0	114,8	101,3	90,0	89,8	99,9
1991	57,2	70,5	88,8	94,2	88,5	93,2	149,2	162,5	112,9	101,6	90,5	90,5	100,0
1992	57,8	67,8	89,8	91,6	94,1	97,8	150,6	154,1	114,0	102,5	90,0	89,2	100,0
1993	58,9	65,8	89,0	89,0	99,5	100,2	152,5	148,3	115,9	103,4	88,8	87,1	99,9
1994	61,1	65,9	89,1	85,1	103,9	101,2	150,1	143,8	119,0	105,4	88,6	83,9	99,8
1995	64,4	67,8	89,3	83,3	107,2	99,6	145,8	140,0	119,7	107,3	89,5	83,7	99,8
1996	68,2	70,1	91,1	80,9	108,2	97,6	139,3	137,5	120,2	110,0	91,6	84,3	99,9
1997	71,1	71,7	91,7	80,3	106,2	95,4	134,4	140,0	120,0	111,7	93,4	84,9	100,1
1998	72,3	71,4	91,6	78,8	101,2	95,5	133,9	147,9	121,3	112,5	93,4	83,3	100,2
1999	70,8	68,9	88,1	79,0	94,9	97,6	140,0	160,1	122,4	110,6	90,7	81,1	100,4
2000	67,6	64,8	84,0	77,4	88,8	101,1	151,4	172,4	125,4	108,0	86,0	77,0	100,3
2001	63,6	61,1	79,4	76,7	84,1	104,8	163,0	182,9	127,6	105,0	81,2	73,0	100,2
2002	60,5	58,6	76,3	75,6	81,6	107,6	171,9	188,7	129,7	103,4	76,9	69,8	100,1
2003	58,9	57,4	74,5	75,8	80,6	109,2	176,4	191,3	129,8	102,4	74,2	68,5	99,9
Average	65,1	65,8	82,9	86,2	86,7	90,5	151,2	170,2	124,6	106,1	84,9	86,0	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 54. Seasonal factors, one year ahead

	Seasonal indices for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avge
2004	58.0	56.9	73.5	75.9	80.2	110.0	178.6	192.6	129.9	101.8	72.8	67.8	99.8

Appendix 55. Original series (arrivals from European OECD countries-1980-2003)

	Monthly arrivals of foreign visitors from European OECD countries to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	18074	16725	25115	40484	59955	53402	82891	105500	70867	45789	20669	18556	558027
1981	11943	14092	23231	56169	64540	67105	88776	117103	84135	64558	24047	25530	641229
1982	19044	22332	25456	61784	59471	70059	89906	112728	78186	59064	27589	28187	653806
1983	20734	19051	40119	54933	88810	68323	106767	116654	91127	67064	41430	35798	750810
1984	19962	18326	30703	74746	87166	86489	129379	156726	116124	78205	41781	42222	881829
1985	21950	20647	45285	87806	103711	106585	164846	200087	151562	105182	43703	39045	1090409
1986	22441	23057	61885	84645	151941	131187	178532	202784	166542	118339	48503	41905	1231761
1987	20736	28816	34247	135489	185203	193929	230740	274439	207676	150804	48007	48291	1558377
1988	36226	46967	97637	170756	327481	293736	390187	417910	363785	270494	88326	68573	2572078
1989	41054	48017	126383	212562	347189	301109	370753	429772	404192	268647	73524	66628	2689830
1990	39037	43810	85480	277540	347931	356339	446388	499217	403492	242600	75833	68589	2886256
1991	28832	21051	43181	76517	165143	193917	310878	356949	343120	198738	53125	50472	1841923
1992	34458	41989	54343	217034	366090	360884	407985	548517	520338	318790	66672	70179	3007279
1993	43925	63116	110768	287708	483819	400606	425967	437552	368138	377341	94194	71791	3164925
1994	51080	62335	123053	183582	322559	353613	426425	432484	362880	356309	109264	72355	2855939
1995	52799	74382	113531	266266	387631	456721	618070	613426	620602	463982	131717	113760	3912887
1996	81457	121102	269055	288158	515958	517770	695737	671558	688357	512342	186539	159220	4707253
1997	93619	123993	285057	358721	656461	651000	744028	867068	797043	517319	208725	158593	5461627
1998	105513	137583	186727	342014	607080	642676	776335	894769	771827	638987	219373	153427	5476311
1999	139579	160680	156907	167703	361101	411389	504293	586832	463711	424904	130886	99591	3607576
2000	102582	116105	173433	395274	580745	654395	968867	862858	845351	736221	279439	192460	5907730
2001	144071	188349	277924	555444	809711	909835	1197062	990841	927376	689719	247966	168554	7106852
2002	118780	187646	363563	502393	878548	966221	1276359	1193166	1153021	957572	354684	261179	8213132
2003	170110	230357	236791	363279	686116	919757	1356684	1364951	1115578	1065095	417656	290112	8216486
Average	59917	76272	124578	219209	360182	381960	499494	518912	463126	363669	126402	97709	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 56. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors from European OECD countries to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	33.6	30.4	47.5	107.5	122.2	121.8	171.5	214.7	151.1	108.7	46.3	45.0	100.0
1981	33,5	30,2	47,4	106,8	123,2	121,2	172,4	213,8	151,6	108,6	47,1	44,9	100,1
1982	33,0	29,7	47,7	105,8	123,8	121,2	173,6	212,2	152,7	109,3	47,8	44,8	100,1
1983	31,8	28,7	47,9	103,9	125,2	121,9	175,1	210,7	154,3	109,5	48,5	44,1	100,1
1984	29,9	27,5	48,1	100,7	128,4	123,5	176,6	209,0	156,5	110,4	48,2	42,5	100,1
1985	27,6	26,2	48,1	97,1	133,0	126,2	177,8	207,6	158,9	111,2	47,4	40,0	100,1
1986	25,1	25,0	47,8	94,3	137,7	129,5	177,5	205,8	162,5	113,6	45,1	37,2	100,1
1987	22,7	23,8	46,5	91,9	142,3	133,7	177,0	204,0	166,4	115,6	42,5	34,7	100,1
1988	20,8	22,8	44,2	90,2	143,7	136,5	178,0	203,7	172,1	117,1	39,5	32,3	100,1
1989	19,4	22,0	41,6	89,2	143,6	138,1	178,5	204,4	178,4	117,7	37,3	30,4	100,1
1990	18,3	21,4	39,6	90,2	141,5	138,9	178,1	204,8	182,7	120,0	35,7	29,1	100,0
1991	17,7	21,2	38,8	90,3	140,8	140,9	177,1	202,9	182,5	123,6	35,7	28,5	100,0
1992	17,7	21,9	38,8	90,8	138,4	142,8	177,4	199,0	179,8	128,1	36,3	28,3	99,9
1993	18,4	23,5	40,1	89,2	137,8	144,3	177,4	193,1	176,4	132,0	38,1	28,9	99,9
1994	19,3	25,4	41,5	87,8	137,7	144,5	176,9	187,1	173,6	135,4	40,0	30,3	100,0
1995	20,5	27,3	42,8	84,6	137,9	144,2	176,2	183,9	171,4	136,8	42,6	32,0	100,0
1996	21,6	28,7	43,3	82,4	135,5	142,8	176,1	184,3	170,9	136,7	44,4	33,4	100,0
1997	22,5	29,7	43,5	80,9	133,5	141,1	176,6	185,4	170,6	135,8	46,1	34,3	100,0
1998	23,0	30,1	43,4	81,8	131,5	140,5	177,8	185,3	168,8	135,7	47,4	34,6	100,0
1999	23,4	30,4	43,4	82,5	130,2	140,9	181,2	183,1	166,0	135,8	48,5	34,6	100,0
2000	23,5	30,8	43,0	83,6	127,4	141,8	186,0	181,5	163,4	135,7	48,9	34,3	100,0
2001	23,5	31,4	42,5	84,2	125,5	142,2	191,2	179,1	161,6	135,1	49,3	34,3	100,0
2002	23,5	31,8	42,1	84,3	124,1	142,8	194,6	178,2	160,5	134,3	49,4	34,2	100,0
2003	23,5	32,1	42,0	84,1	124,3	143,1	195,7	177,3	160,6	133,8	49,4	34,2	100,0
Average	23,9	27,2	43,8	91,0	132,9	136,0	179,2	196,3	166,4	124,2	44,2	35,3	

Appendix 57. Seasonal factors, one year ahead

	Seasonal indices forecasted for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2004	23,4	32,2	41,9	84,0	124,4	143,3	196,3	176,8	160,6	133,5	49,5	34,2	100,0

Appendix 58. Original series (arrivals from Non-European OECD countries-1980-2003)

	Monthly arrivals of foreign visitors from Non-European OECD countries to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	4021	3906	5275	11105	17721	15299	23202	17735	19664	19114	5432	2238	144712
1981	2928	2375	3398	10914	16888	16440	13762	17429	18857	19959	5065	2769	130784
1982	2618	2605	3175	10004	16629	15526	15873	16362	17408	18322	7623	3025	129170
1983	3733	3456	5964	14285	28105	23784	28685	25815	36341	34841	10991	5805	221805
1984	4439	3548	8757	19878	32053	31606	33422	30942	40571	39367	11893	5693	262169
1985	6142	5066	13794	22966	39442	35608	29657	24943	31813	31985	9519	6269	257204
1986	5962	6709	9749	10806	12348	14172	18462	16465	14450	14351	7351	5767	136592
1987	6652	7022	8727	14747	21069	27868	25135	27901	23735	20410	11027	6647	200940
1988	7083	8260	11649	20571	28373	31060	33393	35295	32336	32084	12216	8953	261273
1989	9378	9634	15511	20494	34751	34204	35028	36977	48223	40001	16923	10475	311599
1990	11410	10479	16046	24378	44622	38549	44376	39393	42691	34963	11420	7419	325746
1991	5373	2536	4414	7718	12466	15834	19010	18396	22199	19241	7970	7915	143072
1992	7817	6597	10499	21524	33192	32263	34860	33866	40772	36294	14487	11255	283426
1993	9772	11127	15826	27997	47352	44383	36374	42648	54298	51878	21651	12314	375620
1994	11780	10739	21485	30694	48360	43678	44316	42024	59943	59495	22253	15768	410535
1995	13872	15762	20556	33841	51939	53052	48500	51730	64571	57538	23049	12816	447226
1996	12482	13490	22919	37604	59062	61680	52999	51915	65466	69733	27234	16721	491305
1997	15148	14975	26182	44040	68626	67496	59068	52289	78769	76111	30546	26177	559427
1998	21342	17288	28572	45637	73314	72205	69337	80769	89047	86316	40332	24967	649126
1999	25023	21024	33845	44125	64950	60656	62659	59233	67881	65183	36731	22959	564269
2000	24585	29472	39565	59960	81005	78939	94336	79178	96275	101211	57038	32090	773654
2001	27091	25809	49717	66122	90199	99044	104122	86310	68580	40451	23257	16132	696834
2002	16046	21362	32279	42898	48265	50651	54584	50208	61967	61719	35681	30808	506468
2003	18183	24574	20677	20601	32779	53013	62019	66283	53813	50684	36151	19727	458504
Average	11370	11576	17858	27621	41813	42375	43466	41838	47903	45052	20243	13113	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 59. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors from Non-European OECD countries to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	25.9	24.1	36.5	92.6	154.5	141.9	149.7	154.2	171.9	172.8	49.6	25.9	100.0
1981	26,0	24,4	37,1	92,6	155,0	141,7	149,8	151,7	172,5	172,5	50,0	25,9	99,9
1982	26,2	25,1	38,3	93,5	156,7	142,8	148,7	146,3	171,8	171,7	50,6	26,7	99,9
1983	27,0	27,0	40,6	94,0	156,2	144,0	149,2	142,9	168,4	167,5	51,7	28,4	99,8
1984	28,9	29,9	43,8	94,2	154,3	146,4	149,8	141,1	163,3	160,3	53,6	31,1	99,7
1985	31,3	33,8	47,5	94,0	148,5	147,8	151,3	144,0	157,2	151,8	55,4	33,8	99,7
1986	34,0	37,2	51,2	93,6	143,4	149,1	150,2	146,8	153,7	145,3	56,8	36,2	99,8
1987	36,4	39,6	54,3	92,1	138,9	147,3	150,7	151,0	152,5	141,0	57,6	37,9	99,9
1988	38,0	40,3	56,1	89,1	136,2	145,5	150,4	152,8	156,3	139,4	58,0	38,8	100,1
1989	38,3	39,6	56,3	87,3	135,2	142,2	150,6	152,6	161,8	141,5	57,4	39,2	100,2
1990	37,6	38,2	55,6	86,1	136,7	140,5	148,7	148,7	167,8	145,4	57,4	39,2	100,2
1991	36,9	36,6	54,3	86,8	139,5	138,1	147,6	144,2	170,6	149,6	57,7	39,8	100,1
1992	36,2	35,8	53,4	87,8	140,8	138,4	144,7	140,5	171,7	152,1	59,0	40,1	100,0
1993	36,2	35,2	53,2	90,4	142,3	138,9	140,8	136,7	170,1	155,4	60,2	40,3	100,0
1994	36,6	35,1	54,1	92,0	143,5	140,1	135,7	133,3	168,7	158,0	61,9	40,3	99,9
1995	37,9	34,9	55,4	93,1	144,9	140,5	131,6	130,3	166,4	159,8	63,4	40,7	99,9
1996	39,4	35,1	57,1	92,9	144,3	141,0	129,8	130,1	164,0	158,2	65,0	41,3	99,9
1997	41,2	35,9	59,1	93,5	143,1	140,2	131,0	129,7	159,9	155,2	67,4	42,2	99,9
1998	42,3	37,2	61,7	94,0	141,2	139,0	134,9	130,2	153,9	150,4	70,3	42,6	99,8
1999	42,7	39,4	64,9	95,7	138,4	137,1	139,4	129,9	148,2	146,2	73,2	42,8	99,8
2000	42,1	42,1	68,2	97,2	135,0	135,4	143,8	132,3	142,6	140,5	75,6	42,7	99,8
2001	41,3	45,0	71,2	99,4	131,8	133,8	146,8	133,9	138,3	136,8	77,7	42,6	99,9
2002	40,2	47,0	73,0	100,7	129,8	133,2	148,6	136,7	134,9	133,7	78,8	42,3	99,9
2003	39,6	48,0	74,1	101,5	128,7	133,4	149,0	137,8	133,4	132,9	79,1	42,1	100,0
Average	35,9	36,1	54,9	93,1	142,5	140,8	144,7	140,7	159,2	151,6	62,0	37,6	

Appendix 60. Seasonal factors, one year ahead

	Seasonal indices forecasted for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2004	39,3	48,4	74,6	101,9	128,2	133,5	149,2	138,4	132,6	132,4	79,3	41,9	100,0

Appendix 61. Original series (arrivals from other (Eastern) European countries-1980-2003)

	Monthly arrivals of foreign visitors from other (Eastern) Europeancountries to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	11206	12083	16274	16749	16775	20138	24597	29895	20905	18810	18730	14779	220941
1981	10123	10431	21535	20903	24903	23577	27688	30270	26957	23388	22248	17309	259332
1982	12925	13688	18633	17575	19843	19256	28879	31090	23998	22503	16395	16772	241557
1983	12606	11257	15544	18049	17801	21688	30134	27213	26007	22094	18767	18015	239175
1984	18755	16592	23005	28003	24545	27689	43474	37452	34427	43059	47898	30383	375282
1985	22252	20649	39550	46717	43728	41545	56041	47808	43792	62259	66562	51516	542419
1986	27417	24384	41296	58665	36022	36677	42508	41968	38713	52452	61681	50722	512505
1987	21904	30655	34930	44262	36978	42592	44188	55906	42359	42455	43474	35697	475400
1988	28428	35083	50768	54008	48267	38176	55275	55896	58669	63956	51070	36323	575919
1989	22215	26304	48356	66991	45467	40894	53338	70337	63201	87389	104538	69414	698444
1990	26381	48252	94385	90482	88339	95725	113431	147126	149200	187836	225950	192756	1459863
1991	92693	101355	199801	255105	269919	256510	234414	297035	329046	307787	296376	270324	2910365
1992	137872	177196	242755	305013	296682	282360	449686	314938	229236	279643	249543	217725	3182649
1993	127875	166928	181460	204774	204727	179333	198102	211577	192515	211100	213587	177831	2269809
1994	162027	179692	190131	189792	188567	183231	207585	259763	215123	181478	186771	189661	2333821
1995	151859	159683	156729	140988	198226	195379	183391	227074	224083	187710	145756	139501	2110379
1996	131009	134315	156454	147222	207952	217035	225403	261814	239708	203443	154729	140543	2219627
1997	139106	124424	153513	157624	202597	216444	252438	319882	293434	239715	213938	158939	2472054
1998	165928	159637	186591	176821	217224	249233	293336	331817	218746	198576	164172	123836	2485917
1999	140914	129028	141863	150388	172558	205029	233098	291391	227243	211689	190178	136167	2229546
2000	151664	145211	134112	177767	201723	217930	286667	307948	266689	222293	171990	138968	2422962
2001	125631	128133	133094	167230	202585	252488	306375	352123	308080	235400	173610	153959	2538708
2002	119108	155580	169043	210797	290550	319572	386919	462043	387482	266921	196893	188881	3153789
2003	126672	164714	168446	204167	328861	398680	483518	579584	495010	363029	241921	241623	3796225
Average	82774	90636	109095	122921	141035	149216	177520	199665	173109	155624	136532	117152	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 62. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors from other (Eastern) European countries to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	62.0	64.7	91.4	91.2	93.1	103.3	134.2	146.5	118.4	105.9	109.0	80.4	100.0
1981	62,1	64,6	91,0	92,3	92,6	102,8	135,1	143,7	117,7	107,1	111,4	80,5	100,1
1982	61,9	63,7	91,0	94,8	92,8	101,4	135,7	137,1	115,6	110,2	116,4	81,4	100,2
1983	61,5	62,5	91,5	98,0	93,0	99,0	134,6	129,5	111,5	114,8	123,7	82,9	100,2
1984	60,7	61,6	91,7	101,9	93,2	97,7	131,2	122,4	107,9	118,7	130,0	84,2	100,1
1985	60,0	62,5	92,7	105,3	93,0	95,5	126,1	118,0	105,5	123,2	133,3	85,2	100,0
1986	58,9	63,6	95,1	107,9	93,5	93,0	119,1	116,1	104,9	126,8	134,4	86,4	100,0
1987	57,9	64,7	98,9	108,6	94,0	90,2	112,5	116,3	105,6	129,1	134,4	88,7	100,1
1988	56,1	65,5	100,7	108,3	95,4	89,9	106,8	118,1	106,9	128,4	132,6	91,6	100,0
1989	54,8	66,1	101,3	107,8	97,3	90,7	103,7	119,2	107,5	127,5	129,1	94,9	100,0
1990	53,8	66,9	100,1	107,7	100,6	92,9	102,2	119,6	106,2	125,4	125,8	97,5	99,9
1991	54,6	68,3	98,4	106,8	102,7	95,6	102,5	120,3	105,0	122,3	121,3	99,3	99,8
1992	57,1	71,5	94,5	104,7	104,6	99,2	103,4	122,3	106,2	118,4	114,6	98,4	99,6
1993	61,6	74,8	91,1	100,8	105,5	101,8	105,9	125,6	110,2	115,6	106,2	95,4	99,5
1994	66,8	77,0	88,3	95,9	105,9	103,7	109,0	129,9	116,1	113,5	99,9	90,1	99,7
1995	71,2	77,0	86,9	90,1	104,7	105,6	113,5	135,9	122,1	111,4	95,2	84,7	99,9
1996	73,8	75,8	84,6	85,5	103,4	108,0	117,7	142,3	127,6	110,2	91,9	79,2	100,0
1997	74,4	73,6	82,4	82,7	101,9	110,1	123,4	148,3	130,5	109,6	89,6	74,9	100,1
1998	73,2	71,4	79,4	81,9	100,5	111,7	129,1	153,1	132,5	109,4	88,3	71,3	100,2
1999	71,2	69,4	76,5	81,8	99,5	112,8	134,7	157,6	134,1	108,6	86,3	69,7	100,2
2000	69,1	67,5	73,0	82,1	99,6	114,5	138,3	161,3	136,3	107,8	83,6	68,8	100,1
2001	67,6	65,7	69,9	81,9	100,8	116,0	141,0	163,6	138,5	106,7	80,9	68,8	100,1
2002	66,5	64,1	67,5	81,8	102,0	117,4	142,4	165,1	140,4	105,7	79,1	68,7	100,1
2003	65,9	63,2	66,5	81,5	102,7	118,1	143,2	165,8	141,5	104,7	78,0	68,6	100,0
Average	63,5	67,7	87,7	95,0	98,9	102,9	122,7	136,6	118,7	115,0	108,1	83,0	

Appendix 63. Seasonal factors, one year ahead

	Seasonal indices forecasted for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2004	65,6	62,8	65,9	81,4	103,1	118,5	143,7	166,2	142,1	104,2	77,4	68,5	100,0

Appendix 64. Original series (arrivals from african countries-1986-2003)

	Monthly arrivals of foreign visitors from African countries to Turkey (1986-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1986	4004	3504	3271	3541	3528	4778	8451	9399	7662	9580	6347	5042	69107
1987	6632	3982	6568	6684	6667	10566	15690	21719	16143	11603	15861	17610	139725
1988	16828	7866	13139	18790	12602	20195	24956	21108	21617	18860	12890	13157	202008
1989	8849	9471	13753	9739	9633	15880	16260	13126	11793	9945	8324	7139	133912
1990	7488	7804	7433	4854	6783	9314	15585	5327	8689	6446	4819	5382	89924
1991	2128	1129	3623	3011	5284	5970	8050	8451	7205	6693	4018	4381	59943
1992	4202	4734	3786	4127	6297	7047	8489	8339	6264	5303	4795	5937	69320
1993	4208	4574	3793	5749	8902	8283	8145	8032	6332	4955	6288	6248	75509
1994	5819	4800	5462	6642	11129	8777	10092	10857	8241	8490	9779	10410	100498
1995	11159	7904	11754	13384	11045	12834	13380	13446	11834	9045	9814	10217	135816
1996	10483	5529	8384	6748	8268	11302	12004	15358	11581	10683	9361	10017	119718
1997	7356	5312	11465	8054	11312	11765	13953	14428	11908	10533	11124	11909	129119
1998	6876	6507	8757	7757	10831	13621	15629	13818	11270	11047	10289	10104	126506
1999	5855	6846	7055	7625	10472	17404	15831	16777	10237	9516	10679	10105	128402
2000	7288	7442	10183	11116	15981	16499	23600	21094	15665	14341	15102	9518	167829
2001	9821	9360	11817	14967	18189	19130	20821	20632	15111	13062	16457	10186	179553
2002	12497	8889	15812	16196	15722	17062	18213	19098	16335	19214	13388	13156	185582
2003	6948	9512	10276	11699	15654	17396	20577	23751	18741	21234	10270	15595	181653
Average	7691	6398	8685	8927	10461	12657	14985	14709	12035	11142	9978	9784	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1986-2000, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 65. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors from African countries to Turkey (1986-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1986	87,9	59,5	78,5	72,9	72,5	109,2	147,5	150,8	125,4	114,0	93,9	88,0	100,0
1987	86,4	60,0	79,9	71,8	73,6	111,6	147,5	149,1	125,9	112,9	92,7	87,6	99,9
1988	84,6	60,2	81,9	70,2	77,3	115,7	147,1	146,4	126,0	111,9	89,5	87,4	99,9
1989	82,9	61,2	82,1	68,7	83,8	120,0	147,3	143,2	125,9	110,1	85,5	87,6	99,9
1990	79,4	63,4	81,3	69,0	93,1	123,5	146,2	140,6	123,3	106,3	83,4	87,9	99,8
1991	77,5	66,1	78,9	71,5	102,6	124,3	144,2	139,1	119,0	101,2	83,8	89,5	99,8
1992	76,5	68,3	76,9	75,6	110,1	123,0	140,1	138,7	113,9	96,6	86,7	92,5	99,9
1993	77,4	68,7	76,6	79,3	113,1	121,2	135,5	138,3	110,1	94,1	90,3	96,5	100,1
1994	76,9	67,8	78,4	81,8	113,0	119,7	131,3	137,2	108,5	93,1	94,8	99,9	100,2
1995	76,4	65,5	81,1	81,7	110,1	119,1	129,9	137,0	108,4	94,7	98,0	102,5	100,4
1996	74,2	63,1	82,2	79,9	107,0	118,8	132,3	137,8	109,4	97,0	99,5	102,8	100,3
1997	71,0	61,1	82,1	77,9	105,1	119,1	137,9	139,8	109,2	99,0	99,4	100,9	100,2
1998	67,4	60,0	80,3	78,3	106,4	119,7	143,2	140,7	108,0	98,1	100,3	96,8	99,9
1999	65,7	59,6	78,6	81,7	108,2	120,3	146,2	140,3	106,4	97,2	100,7	92,3	99,8
2000	65,7	60,7	77,0	86,1	109,9	120,5	145,7	139,7	105,4	96,5	101,1	88,0	99,7
2001	67,0	61,8	76,9	90,1	111,0	120,0	142,7	139,1	105,5	97,4	100,5	85,0	99,8
2002	68,6	62,6	76,9	92,9	112,1	119,4	138,8	138,9	105,9	98,6	100,7	82,9	99,9
2003	69,7	62,7	77,1	94,6	112,5	119,5	136,1	138,1	106,4	99,5	101,0	82,2	100,0
Average	75,3	62,9	79,3	79,1	101,2	119,2	141,1	140,8	113,5	101,0	94,5	91,7	

Appendix 66. Seasonal factors, one year ahead

	Seasonal indices forecasted for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2004	70,2	62,7	77,3	95,5	112,7	119,6	134,8	137,7	106,7	99,9	101,1	81,8	100,0

Appendix 67. Original series (arrivals from Asian countries-1986-2003)

	Monthly arrivals of foreign visitors from Asian countries to Turkey (1986-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1986	19163	19861	22210	24417	26899	45863	66134	66100	47497	34486	26843	24724	424197
1987	21095	19424	19782	27840	33721	43564	73489	73563	47864	37342	32683	27069	457436
1988	23050	27288	26541	33084	32654	47673	86570	67738	64504	51683	39878	35447	536110
1989	28498	31852	46102	33905	39468	47315	80114	78330	73357	53173	40926	37725	590765
1990	29779	31924	38671	30687	39796	56097	81480	74729	59126	51810	48353	48370	590822
1991	33226	30795	32664	33561	48221	43909	60883	78705	69672	46626	42215	32433	552910
1992	23749	23913	25686	29103	34282	41625	64913	81709	60951	53291	34240	30085	503547
1993	24621	26089	29937	48391	47389	44839	65782	80136	65495	48331	43735	39214	563959
1994	34817	42485	51908	54148	69203	76216	124042	146593	119171	81238	61370	50535	911726
1995	42718	42681	64001	75975	77410	86100	137734	158451	126356	110593	79788	62039	1063846
1996	44822	47492	77431	71862	77564	86238	110660	146565	102520	105267	71630	66344	1008395
1997	43158	42830	75720	66910	74553	90401	125711	143109	105303	94382	70699	59203	991979
1998	43791	47987	63485	65392	70104	77577	123158	129633	107013	90307	64587	56016	939050
1999	44907	52007	66944	52821	77603	84842	107984	118904	98488	84399	65075	50414	904388
2000	45809	54329	75450	73674	101904	105881	144623	141613	137049	97542	76256	48079	1102209
2001	50872	51292	72729	76293	104980	97364	139857	144368	114550	84319	58155	47262	1042041
2002	39171	51778	92891	78244	89278	100072	155205	170649	146851	111336	60681	64048	1160204
2003	41165	50693	62360	68435	77193	117931	201880	234687	185958	152691	68061	74688	1335742
Average	35245	38596	52473	52486	62346	71862	108346	118643	96207	77156	54732	47428	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

Appendix 68. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors from Asian countries to Turkey (1986-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1986	58,8	65,0	67,3	74,2	80,7	106,4	185,0	173,4	134,1	101,9	81,4	71,6	100,0
1987	59,0	65,2	68,2	73,9	80,8	106,5	182,9	171,6	135,0	102,5	82,5	72,0	100,0
1988	59,6	65,4	69,0	73,5	81,3	106,1	178,5	168,9	137,3	103,5	85,0	73,0	100,1
1989	60,1	65,0	69,4	73,2	81,5	105,5	173,2	167,5	140,1	104,8	87,2	73,8	100,1
1990	60,5	64,3	69,4	73,2	82,9	104,0	166,2	169,2	143,5	105,4	88,6	74,2	100,1
1991	60,3	62,7	69,7	73,4	84,4	103,0	161,0	173,3	145,7	105,3	88,3	73,4	100,0
1992	59,8	60,8	70,4	74,6	86,7	101,6	156,9	178,3	146,5	105,4	87,4	71,9	100,0
1993	58,2	58,8	72,1	76,5	88,3	100,9	155,5	181,5	144,9	106,7	85,9	70,2	100,0
1994	56,3	57,2	75,0	78,9	89,9	100,9	154,6	181,7	142,0	108,8	84,7	69,3	100,0
1995	54,5	56,2	78,5	80,7	90,7	101,8	155,0	179,3	138,4	110,9	84,0	68,7	99,9
1996	53,7	56,3	81,3	82,2	91,7	103,2	154,6	175,0	135,2	112,7	84,2	68,5	99,9
1997	53,3	57,3	83,0	82,8	92,5	105,1	154,4	170,8	134,1	113,1	83,9	67,9	99,9
1998	53,5	58,5	83,4	83,1	93,5	107,6	154,3	167,6	134,6	112,3	83,2	66,9	99,9
1999	53,5	59,6	82,9	83,0	94,1	108,9	155,6	166,2	138,1	111,2	81,1	65,4	100,0
2000	53,1	60,0	81,4	82,3	94,6	109,4	157,4	167,6	141,3	111,1	78,6	63,5	100,0
2001	52,0	59,8	80,3	81,5	94,5	109,2	159,7	169,9	144,4	111,4	76,3	62,0	100,1
2002	50,9	59,0	79,1	80,5	94,2	109,0	161,8	173,2	145,6	111,9	74,6	60,8	100,0
2003	50,3	58,4	78,5	80,4	93,8	108,4	163,2	175,0	146,2	112,1	73,3	60,3	100,0
Average	56,0	60,5	75,5	78,2	88,7	105,4	162,8	172,8	140,4	108,4	82,8	68,5	

Appendix 69. Seasonal factors, one year ahead

	Seasonal indices forecasted for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2004	50,0	58,1	78,3	80,3	93,6	108,1	163,9	175,9	146,5	112,1	72,7	60,1	100,0

Appendix 70. Original series (arrivals from American countries-1980-2003)(Excluding USA & Canada)

	Monthly arrivals of foreign visitors from American countries to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	692	660	489	1550	3230	4347	4406	3176	3095	2669	426	224	24964
1981	238	222	682	1595	2891	4331	3653	4308	3038	2559	678	254	24449
1982	309	253	716	1145	1665	1330	2428	2295	2000	1491	1015	462	15109
1983	448	425	833	1062	1798	1934	2999	1832	1373	1252	119	299	14374
1984	650	109	551	852	1230	1451	3016	2779	2412	2050	190	206	15496
1985	300	265	197	1183	1302	1567	4050	2113	2616	1169	296	184	15242
1986	495	413	610	896	1651	1772	2427	1971	2918	1990	503	326	15972
1987	420	388	477	1241	2277	2875	4005	2898	3099	2489	979	357	21505
1988	444	561	747	1615	2322	2848	4153	2774	2616	2846	780	446	22152
1989	709	680	1268	1478	2868	3271	6310	4105	4633	3430	1352	570	30674
1990	834	811	788	1511	1892	2784	5625	11585	3707	2216	776	501	33030
1991	351	192	231	473	806	1223	1878	1710	1963	2133	482	450	11892
1992	567	533	404	2105	3233	2602	4058	4840	3367	4127	963	622	27421
1993	1059	1663	1758	3434	5121	4397	8273	3821	5812	5347	3001	2075	45761
1994	1920	1534	1665	3319	4296	5022	6618	5112	7877	7946	2243	2380	49932
1995	1958	1669	1311	4486	5549	5504	6293	4480	6200	6388	2279	1428	47545
1996	2903	2395	2429	3701	5056	6583	7026	4632	8442	6734	2014	1828	53743
1997	1830	1493	2226	3384	6403	7215	8253	5618	9585	8136	2483	1730	58356
1998	2111	1782	1672	4020	6889	5994	8230	7129	10097	8922	3062	1946	61854
1999	2229	1611	2274	3365	3915	4161	6283	5053	8105	4048	1701	1112	43857
2000	1479	1275	1733	2509	4266	4198	5418	4180	6500	6197	2241	2038	42034
2001	1453	1379	1446	4020	5140	8958	6086	5168	5633	2230	1156	642	43311
2002	687	817	1437	1860	2751	2921	3750	2789	3711	2705	1248	1158	25834
2003	578	993	634	631	4983	2898	3447	3110	3626	3703	1359	1026	26988
Average	1028	922	1107	2143	3397	3758	4945	4062	4684	3866	1306	928	
	Source:1- Gn. Dir. of Security 2- Turkish Ministry of Tourism, Bulletin of tourism statistics, 1980-2003, Gn. Dir. of Investments, Dept. of Research and Evaluation												

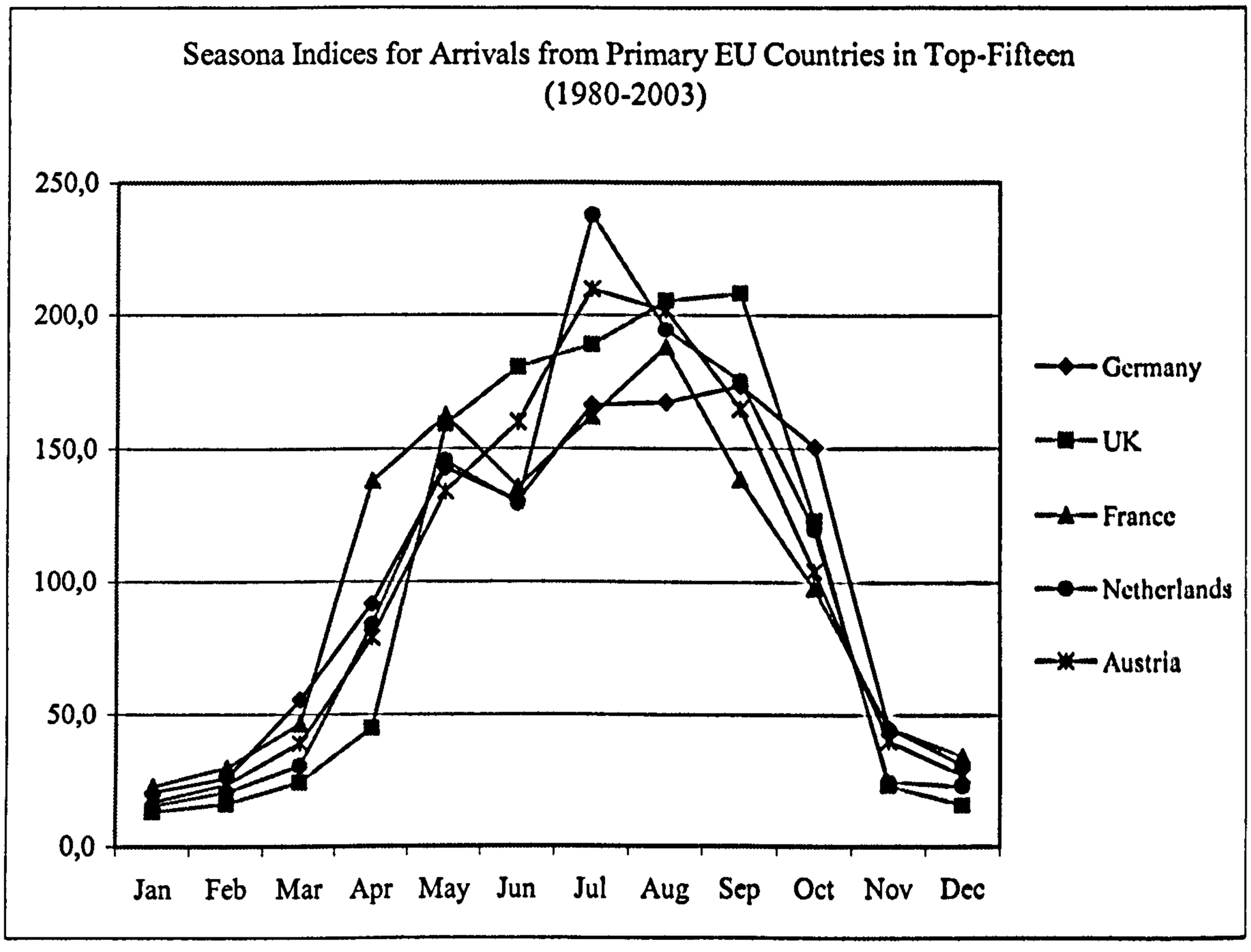
Appendix 71. Final seasonal factors (3X5 moving average selected)

	Final seasonal indices for monthly arrivals of foreign visitors from American countries to Turkey (1980-2003)												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1980	21.9	18.4	46.3	83.0	143.8	170.3	203.9	178.9	150.3	129.7	33.2	19.7	100.0
1981	22,5	19,1	47,1	82,2	140,7	165,9	208,2	179,6	150,7	130,7	33,0	19,6	100,0
1982	23,2	20,1	48,3	82,7	134,0	155,7	218,8	181,1	154,7	128,2	32,5	19,3	99,9
1983	24,9	21,7	49,3	82,5	127,1	142,8	228,7	180,6	164,4	126,1	31,8	19,4	99,9
1984	26,6	23,4	48,1	81,2	121,7	135,8	237,1	175,8	173,5	125,3	31,9	19,2	100,0
1985	28,3	25,2	45,7	79,4	119,1	134,4	237,2	169,5	179,9	130,1	32,8	19,3	100,1
1986	29,0	26,5	41,8	77,8	118,3	137,8	236,3	163,2	182,1	133,1	35,4	19,3	100,1
1987	29,9	28,1	39,0	75,8	117,8	139,7	233,9	160,3	181,9	135,3	38,9	21,2	100,1
1988	30,2	29,0	36,0	72,8	116,7	142,4	234,0	159,0	178,1	137,8	41,9	23,4	100,1
1989	30,6	29,8	34,8	72,2	115,2	140,8	229,7	163,0	172,1	144,0	43,1	25,5	100,1
1990	31,2	30,0	34,9	73,7	115,2	135,8	227,1	163,9	168,7	147,8	43,2	26,9	99,9
1991	33,3	31,0	36,8	77,5	116,7	130,4	218,5	161,3	168,0	152,4	43,1	28,8	99,8
1992	35,7	32,1	39,2	82,6	120,8	128,7	205,7	152,9	167,2	157,4	44,0	30,4	99,7
1993	38,5	33,9	42,6	88,4	124,1	129,1	190,0	143,0	167,4	162,7	45,5	32,3	99,8
1994	41,0	35,4	46,1	90,6	127,1	131,7	179,3	130,1	170,5	164,3	48,0	34,1	99,9
1995	43,4	36,8	48,7	89,7	127,2	134,0	171,5	121,7	177,0	164,0	50,3	36,1	100,0
1996	44,4	37,1	50,0	86,9	126,1	135,3	167,6	119,1	183,7	161,5	52,0	37,1	100,1
1997	44,7	36,9	50,8	83,9	125,5	134,0	164,7	122,6	188,5	159,6	52,8	37,1	100,1
1998	43,8	36,2	50,5	82,8	125,9	131,6	166,6	127,9	190,7	155,3	53,0	35,9	100,0
1999	42,5	36,3	49,6	83,4	127,2	130,3	168,9	133,1	190,0	151,2	53,2	34,6	100,0
2000	39,9	36,9	48,1	86,3	128,3	131,1	171,5	138,5	186,1	146,4	53,1	33,2	100,0
2001	37,4	38,1	47,4	88,3	130,0	134,4	173,1	140,3	181,2	143,7	53,1	32,8	100,0
2002	35,1	39,2	46,4	89,9	131,6	138,4	173,7	141,4	176,7	142,3	52,4	32,5	100,0
2003	33,9	39,7	45,7	91,1	133,3	140,3	173,2	141,7	174,1	142,0	52,2	32,4	100,0
Average	33,8	30,9	44,7	82,7	125,6	138,8	200,8	152,0	174,1	144,6	43,8	27,9	

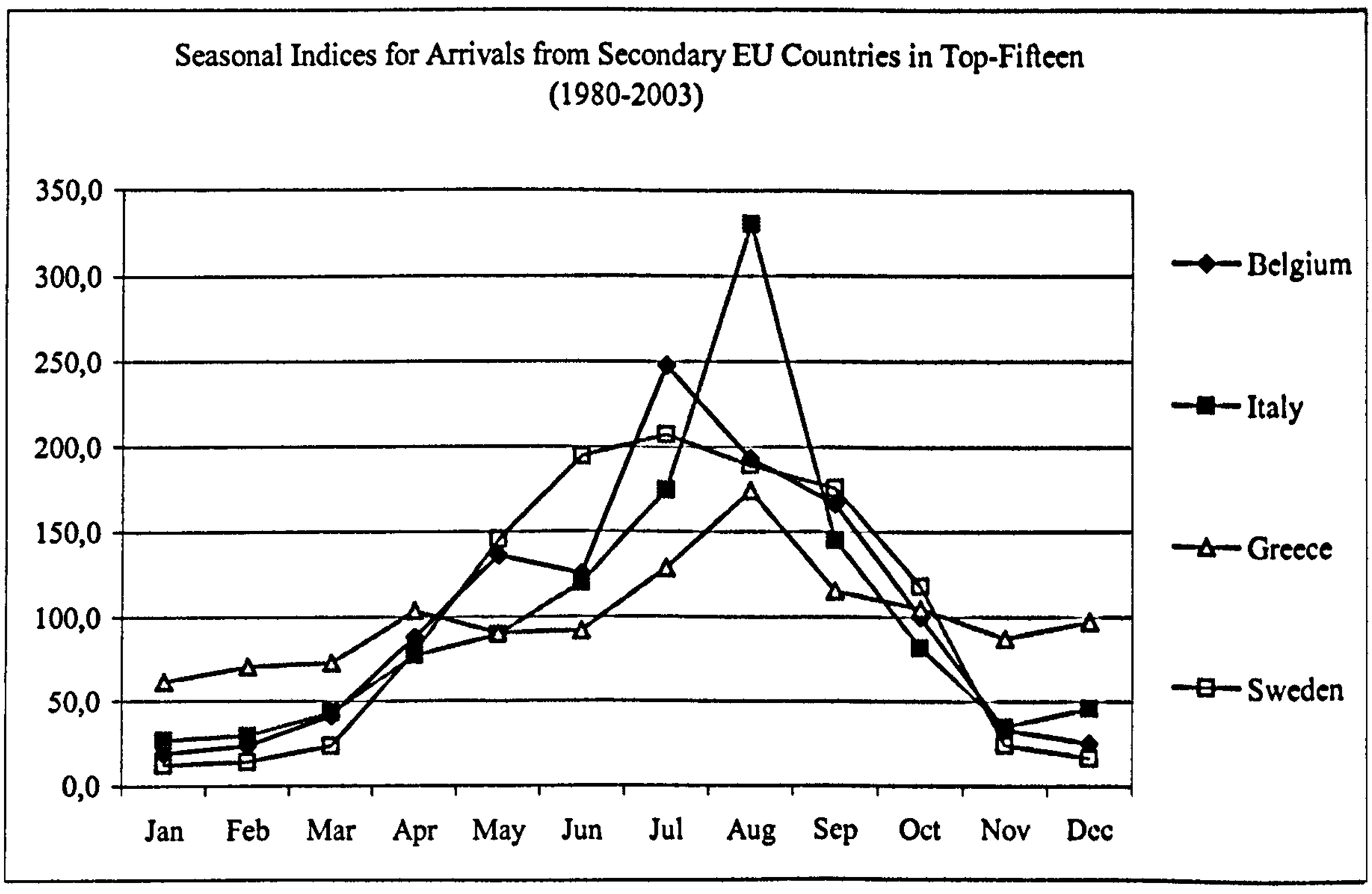
Appendix 72. Seasonal factors, one year ahead

	Seasonal indices forecasted for one year ahead - 2004												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2004	33,3	40,0	45,4	91,7	134,2	141,3	173,0	141,8	172,8	141,8	52,1	32,3	100,0

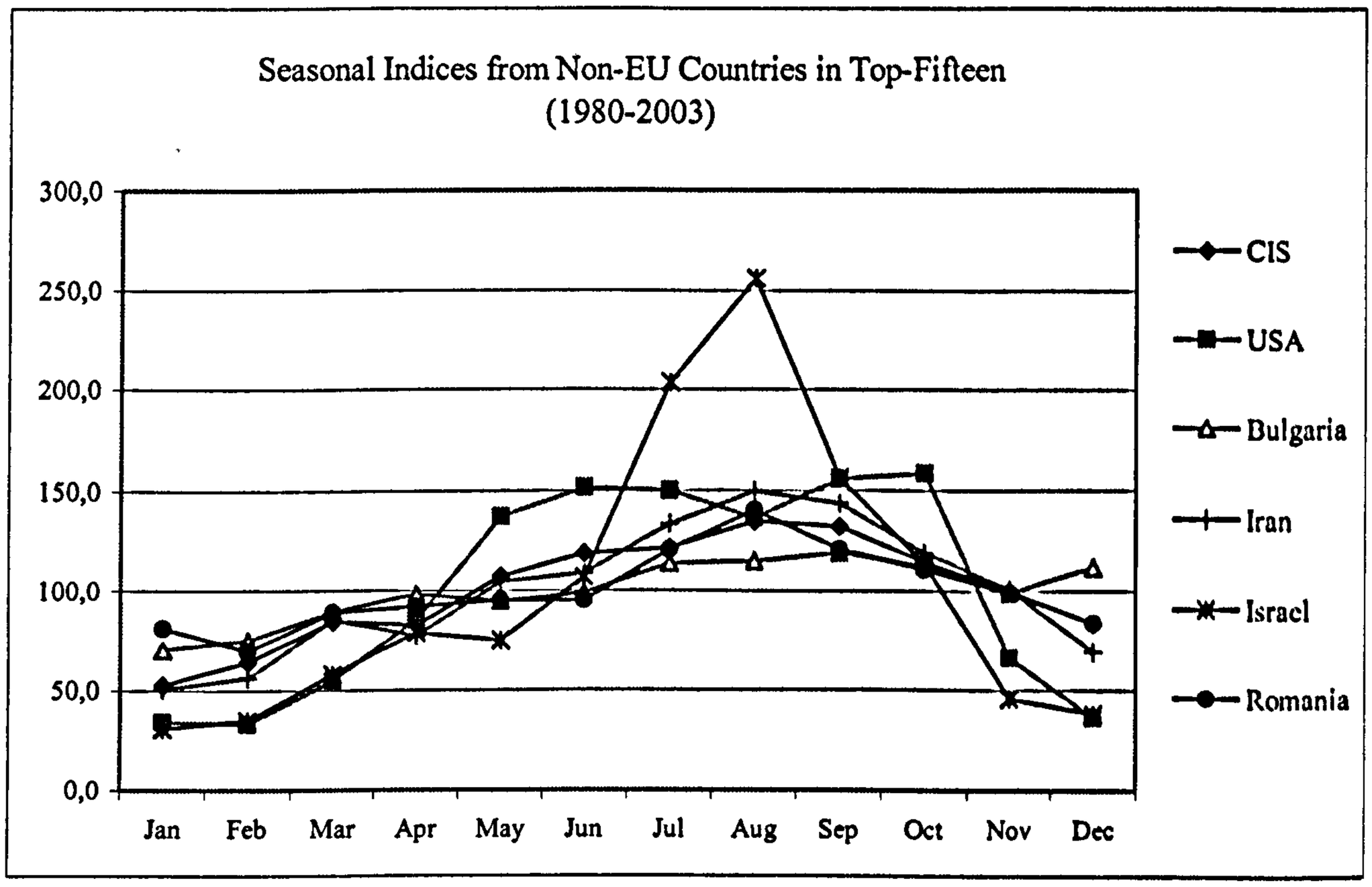
Appendix 73. Seasonal Indices for arrivals from primary EU countries in top-fifteen



Appendix 74. Seasonal Indices for arrivals from Seconday EU countries in top-fifteen



Appendix 75. Seasonal Indices for arrivals from non-EU countries in top-fifteen



Appendix 76. Seasonal indices for number of Foreign, Turkish and overall visitors by region (1994-1996)

	Seasonality of number of FOREIGN VISITORS by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	68	74	99	105	107	96	112	138	128	111	88	73	1200
Aegean	21	25	46	105	140	151	175	198	177	115	29	17	1200
Mediterranean	23	28	56	100	128	134	172	192	161	145	36	25	1200
C.Anatolia	44	45	69	115	142	111	111	142	160	131	77	54	1200
Black Sea	43	34	53	109	140	125	138	174	171	111	56	47	1200
E.Anatolia	121	78	114	95	106	115	90	107	107	104	87	74	1200
SE.Anatolia	59	57	100	90	138	134	94	108	123	124	103	70	1200
Coastal	43	47	71	103	122	123	145	169	149	125	58	46	1200
Inner	40	43	71	115	136	118	132	159	167	115	65	40	1200
TURKEY	42	47	71	105	124	122	143	167	152	123	59	45	1200

	Seasonality of number of TURKISH VISITORS by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	103	80	104	99	95	98	106	113	106	101	94	101	1200
Aegean	83	67	96	105	103	99	135	146	113	97	74	83	1200
Mediterranean	69	57	78	95	121	110	147	154	125	101	71	71	1200
C.Anatolia	92	68	102	103	108	106	96	102	113	109	106	95	1200
Black Sea	91	77	99	98	99	98	115	121	103	100	101	100	1200
E.Anatolia	94	73	95	89	100	105	107	114	116	109	105	93	1200
SE.Anatolia	115	83	101	106	109	107	72	80	93	109	113	113	1200
Coastal	86	69	93	101	106	103	126	135	114	100	81	87	1200
Inner	98	73	102	99	101	101	102	108	108	105	105	99	1200
TURKEY	90	71	96	100	104	102	117	125	112	102	90	91	1200

	Seasonality of number of OVERALL VISITORS by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	84	77	101	103	102	97	109	126	118	107	91	86	1200
Aegean	50	44	68	105	124	129	156	173	147	106	51	49	1200
Mediterranean	41	39	64	98	126	125	162	176	146	127	51	44	1200
C.Anatolia	78	61	92	107	119	108	101	114	127	115	97	83	1200
Black Sea	84	71	93	99	104	101	118	129	113	101	94	92	1200
E.Anatolia	97	74	98	90	101	106	105	112	114	108	102	90	1200
SE.Anatolia	105	77	95	99	104	102	94	101	109	103	106	104	1200
Coastal	62	57	81	102	115	115	137	153	133	114	68	64	1200
Inner	81	65	93	104	111	106	110	122	124	108	94	82	1200
TURKEY	67	59	84	102	114	112	129	145	131	112	75	69	1200

Appendix 77. Seasonal indices for no of Foreign, Turkish and overall nights spent by region (1994-1996)

	Seasonality of no of FOREIGN NIGHTS SPENT by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	71	80	102	102	101	95	113	141	119	109	88	77	1200
Aegean	12	14	25	89	151	169	200	217	183	120	13	8	1200
Mediterranean	20	23	48	91	129	143	167	199	170	151	36	22	1200
C.Anatolia	45	47	70	112	140	116	108	136	156	124	83	63	1200
Black Sea	51	38	58	110	128	122	140	181	151	106	57	58	1200
E.Anatolia	126	92	127	89	105	107	103	114	99	96	77	66	1200
SE.Anatolia	73	52	89	69	103	107	129	139	160	106	107	66	1200
Coastal	30	34	54	92	129	140	163	190	161	133	42	31	1200
Inner	44	46	72	112	135	118	123	152	158	115	72	52	1200
TURKEY	31	34	55	94	129	138	161	188	161	132	44	33	1200

	Seasonality of no of TURKISH NIGHTS SPENT by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	100	80	101	95	98	96	113	121	103	99	97	98	1200
Aegean	65	60	74	102	110	106	160	185	126	90	59	65	1200
Mediterranean	50	45	58	88	132	117	169	201	146	93	48	51	1200
C.Anatolia	91	71	105	102	110	110	96	96	111	111	103	94	1200
Black Sea	99	82	100	93	96	97	117	121	100	98	94	103	1200
E.Anatolia	93	80	103	98	102	105	104	110	112	109	94	89	1200
SE.Anatolia	101	77	97	103	102	100	91	99	107	110	114	100	1200
Coastal	71	61	76	94	115	107	147	169	126	94	68	71	1200
Inner	96	77	105	100	102	102	103	106	107	107	100	97	1200
TURKEY	79	66	85	96	110	106	133	150	120	98	78	79	1200

	Seasonality of no of OVERALL NIGHTS SPENT by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	82	80	102	99	100	95	113	134	113	105	92	85	1200
Aegean	28	27	39	92	140	151	188	208	166	111	26	24	1200
Mediterranean	27	28	51	90	130	138	168	199	164	138	39	28	1200
C.Anatolia	75	63	93	106	120	112	100	110	126	115	96	84	1200
Black Sea	93	76	95	95	100	100	120	129	107	99	89	97	1200
E.Anatolia	98	83	109	97	102	105	104	110	110	107	91	86	1200
SE.Anatolia	99	75	96	100	102	100	94	102	111	110	113	97	1200
Coastal	41	41	60	93	125	131	159	184	151	122	50	42	1200
Inner	81	67	95	104	112	107	108	119	121	109	92	84	1200
TURKEY	47	45	65	95	123	128	151	174	146	120	56	49	1200

Appendix 78. Seasonal indices for Avg. Foreign, Turkish and overall Length of Stay by region (1994-1996)

	Seasonality of AVG. FOREIGN LENGTH OF STAY by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	105	107	102	95	94	98	101	102	92	98	100	105	1200
Aegean	67	66	65	102	130	135	140	135	125	127	52	55	1200
Mediterranean	93	86	90	94	103	110	101	108	110	109	105	90	1200
C.Anatolia	101	102	100	96	96	103	95	94	96	93	106	117	1200
Black Sea	114	108	107	99	88	95	97	100	85	92	99	116	1200
E.Anatolia	112	118	110	96	99	92	113	104	90	91	86	89	1200
SE.Anatolia	140	106	101	92	84	89	83	84	95	97	120	108	1200
Coastal	76	77	82	98	115	123	123	122	117	116	79	74	1200
Inner	108	102	98	94	96	97	89	93	92	97	108	125	1200
TURKEY	79	79	83	96	112	121	121	121	114	115	81	78	1200

	Seasonality of AVG. TURKISH LENGTH OF STAY by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	98	100	97	96	103	98	106	108	97	98	103	97	1200
Aegean	82	91	80	100	111	110	123	131	114	96	82	81	1200
Mediterranean	78	84	80	97	115	114	122	138	124	98	72	76	1200
C.Anatolia	99	104	103	99	102	103	99	95	98	102	97	99	1200
Black Sea	109	106	101	95	97	99	102	100	97	98	94	103	1200
E.Anatolia	98	110	109	110	101	100	97	96	96	100	88	95	1200
SE.Anatolia	93	99	101	103	99	98	100	101	100	107	106	93	1200
Coastal	85	89	84	96	110	107	119	129	113	96	86	84	1200
Inner	98	104	102	101	101	101	101	98	98	102	95	98	1200
TURKEY	89	94	90	97	107	105	115	122	108	97	88	88	1200

	Seasonality of AVG. OVERALL LENGTH OF STAY by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	99	104	100	96	98	98	103	106	96	99	101	99	1200
Aegean	64	69	65	101	130	134	138	137	128	119	59	57	1200
Mediterranean	71	77	85	100	113	120	114	124	123	118	83	70	1200
C.Anatolia	97	103	102	99	101	104	99	97	99	100	99	101	1200
Black Sea	111	107	102	95	95	98	101	100	94	97	95	105	1200
E.Anatolia	100	112	110	107	100	98	98	97	95	98	88	95	1200
SE.Anatolia	94	98	101	102	98	98	100	101	101	107	106	93	1200
Coastal	72	77	80	98	117	123	124	128	120	114	77	70	1200
Inner	100	104	102	100	100	100	98	98	97	101	98	102	1200
TURKEY	74	80	82	98	114	120	123	127	117	113	78	74	1200

Appendix 79. Foreign visitors' average length of stay by region-1994-1996

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Foreign visitors' average length of stay in accommodation establishments in 1994												
Marmara	2.7	2.7	2.6	2.6	2.5	2.6	2.7	2.7	2.4	2.6	2.6	2.6
Aegean	3.1	2.7	3.3	4.1	4.9	5.7	5.8	5.2	5.2	5.2	2.1	2.5
Mediter.	6.8	6.5	6.2	7.0	7.0	7.9	7.3	8.2	8.8	8.7	7.9	6.1
C.Anat.	2.6	2.7	2.2	2.2	2.0	2.1	1.9	2.0	2.0	2.1	2.1	2.3
B.Sea	1.8	1.7	1.5	1.4	1.5	1.3	1.4	1.4	1.2	1.4	1.4	1.9
E.Anat.	2.0	2.5	2.2	1.4	1.3	1.2	2.1	1.2	1.2	1.2	1.1	1.2
SE.Anat.	2.7	2.4	2.7	3.1	2.5	2.0	2.1	2.0	2.5	1.8	2.4	1.9
Coastal	3.3	3.3	3.5	4.2	4.8	5.3	5.4	5.5	5.4	5.5	3.7	3.3
Inner	2.4	2.6	1.9	1.7	1.6	1.6	1.6	1.5	1.6	1.7	1.8	2.1
TURKEY	3.2	3.2	3.3	3.8	4.3	4.8	4.9	4.9	4.8	4.9	3.3	3.1
Foreign visitors' average length of stay in accommodation establishments in 1995												
Marmara	2.5	2.7	2.5	2.2	2.2	2.3	2.3	2.4	2.2	2.3	2.3	2.5
Aegean	1.7	2.2	2.4	3.6	4.7	5.5	5.1	5.4	4.6	4.7	2.0	1.7
Mediter.	5.9	5.6	6.2	5.8	6.4	7.2	6.7	6.8	6.5	6.3	6.6	6.3
C.Anat.	2.4	2.2	2.2	2.1	2.1	2.2	2.2	2.1	2.1	1.9	2.4	2.6
B.Sea	1.7	1.5	1.4	1.2	1.2	1.2	1.3	1.4	1.2	1.2	1.4	1.4
E.Anat.	1.1	1.2	1.4	1.5	1.4	1.3	1.2	1.8	1.4	1.3	1.3	1.3
SE.Anat.	2.6	1.9	1.8	2.2	1.7	2.0	1.6	1.8	1.8	2.6	2.9	2.8
Coastal	3.0	3.3	3.4	4.0	4.7	5.3	5.2	5.0	4.7	4.5	3.2	3.1
Inner	1.9	1.7	1.7	1.7	1.7	1.7	1.5	1.7	1.6	1.7	1.9	2.2
TURKEY	2.9	3.0	3.1	3.5	4.1	4.7	4.6	4.5	4.1	4.1	3.0	3.0
Foreign visitors' average length of stay in accommodation establishments in 1996												
Marmara	2.6	2.5	2.4	2.3	2.2	2.3	2.4	2.4	2.2	2.2	2.2	2.3
Aegean	3.3	2.8	2.4	3.8	4.8	4.4	4.4	4.3	4.3	4.6	2.6	2.9
Mediter.	6.9	6.1	5.9	6.8	7.2	7.2	7.5	6.3	6.8	7.6	4.3	5.4
C.Anat.	1.9	2.1	2.0	2.0	2.0	2.1	2.0	1.7	1.9	2.1	2.0	1.9
B.Sea	1.6	1.5	1.7	1.6	1.3	1.4	1.4	1.5	1.3	1.3	1.7	1.6
E.Anat.	2.2	2.2	1.8	1.2	1.4	1.3	1.6	1.6	1.5	1.4	1.2	1.4
SE.Anat.	3.6	2.8	2.7	1.8	2.0	2.0	2.4	2.2	1.8	1.8	3.2	2.8
Coastal	3.5	3.3	3.5	4.3	4.9	4.9	5.1	4.6	4.6	4.8	2.9	3.2
Inner	1.8	1.8	1.7	1.6	1.6	1.6	1.5	1.4	1.5	1.8	1.7	1.6
TURKEY	3.3	3.1	3.2	3.8	4.4	4.4	4.5	4.1	4.1	4.4	2.7	2.9

Appendix 80. Turkish visitors' average length of stay by region-1994-1996

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Turkish visitors' average length of stay in 1994												
Marmara	1.8	1.8	1.8	1.8	1.7	1.7	1.9	1.9	1.7	1.7	1.9	1.8
Aegean	1.8	1.8	2.0	2.0	2.4	2.3	2.6	2.9	2.5	2.1	1.8	1.7
Mediter.	2.4	2.0	2.2	2.3	3.3	3.1	3.6	4.1	3.6	2.9	2.1	2.2
C.Anat.	1.8	1.7	1.7	1.7	1.7	1.7	1.7	1.6	1.7	1.8	1.7	1.7
B.Sea	1.7	1.6	1.8	1.6	1.6	1.7	1.7	1.6	1.6	1.6	1.4	1.7
E.Anat.	1.5	1.4	1.4	1.4	1.3	1.3	1.3	1.3	1.3	1.3	1.2	1.4
SE.Anat.	1.6	1.3	1.5	1.5	1.4	1.4	1.4	1.5	1.4	1.4	1.4	1.3
Coastal	1.9	1.9	2.0	2.0	2.4	2.3	2.6	2.9	2.5	2.1	1.9	1.8
Inner	1.7	1.6	1.7	1.6	1.6	1.6	1.7	1.6	1.6	1.6	1.5	1.6
TURKEY	1.9	1.8	1.9	1.8	2.2	2.0	2.3	2.5	2.2	2.0	1.7	1.8
Turkish visitors' average length of stay in 1995												
Marmara	1.7	1.7	1.7	1.7	1.9	1.7	2.0	1.9	1.8	1.8	1.8	1.7
Aegean	1.7	1.7	1.7	1.9	2.3	2.1	2.5	2.6	2.2	1.9	1.6	1.7
Mediter.	2.4	2.3	2.2	2.4	3.2	3.0	3.0	3.4	3.1	2.4	1.8	1.9
C.Anat.	1.7	1.8	1.7	1.7	1.9	1.9	1.8	1.7	1.7	1.8	1.7	1.7
B.Sea	1.6	1.6	1.6	1.4	1.4	1.5	1.4	1.5	1.4	1.4	1.5	1.5
E.Anat.	1.4	1.6	1.8	1.6	1.5	1.6	1.4	1.4	1.5	1.6	1.3	1.4
SE.Anat.	1.2	1.3	1.4	1.4	1.3	1.4	1.4	1.3	1.4	1.5	1.5	1.3
Coastal	1.8	1.8	1.8	1.9	2.4	2.2	2.5	2.6	2.3	2.0	1.8	1.7
Inner	1.6	1.7	1.7	1.6	1.7	1.7	1.7	1.6	1.6	1.7	1.6	1.6
TURKEY	1.7	1.8	1.8	1.8	2.2	2.0	2.2	2.3	2.0	1.9	1.7	1.7
Turkish visitors' average length of stay in 1996												
Marmara	1.9	1.8	1.7	1.7	1.8	1.7	1.9	1.8	1.7	1.7	1.7	1.8
Aegean	1.7	2.1	1.6	2.2	2.3	2.4	2.6	2.7	2.2	1.8	1.7	1.6
Mediter.	1.8	2.2	2.0	2.7	2.8	3.0	3.7	3.6	3.3	2.5	2.0	2.0
C.Anat.	1.7	1.9	1.9	1.8	1.7	1.8	1.7	1.7	1.7	1.8	1.7	1.6
B.Sea	1.7	1.6	1.5	1.5	1.5	1.5	1.5	1.5	1.4	1.5	1.4	1.6
E.Anat.	1.5	1.7	1.5	1.6	1.6	1.4	1.5	1.5	1.4	1.5	1.6	1.5
SE.Anat.	1.3	1.4	1.4	1.4	1.4	1.3	1.6	1.4	1.3	1.3	1.6	1.4
Coastal	1.8	2.0	1.8	2.1	2.2	2.3	2.6	2.7	2.3	2.0	1.8	1.8
Inner	1.6	1.8	1.7	1.7	1.7	1.7	1.7	1.6	1.6	1.6	1.6	1.6
TURKEY	1.7	1.9	1.7	2.0	2.0	2.1	2.3	2.4	2.0	1.8	1.7	1.7

Appendix 81. Overall visitors' length of stay in accommodation establishments (1994-1996)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overall visitors' average length of stay in 1994												
Marmara	2.2	2.2	2.2	2.2	2.2	2.2	2.3	2.4	2.1	2.2	2.3	2.2
Aegean	2.0	2.0	2.4	3.1	3.9	4.4	4.4	4.2	4.2	3.9	1.9	1.8
Mediter.	3.4	3.4	3.7	4.6	5.2	5.9	5.7	6.5	6.7	6.5	4.3	3.5
C.Anat.	1.9	1.9	1.9	1.9	1.8	1.8	1.7	1.7	1.8	1.9	1.8	1.8
B.Sea	1.7	1.6	1.8	1.6	1.6	1.6	1.7	1.6	1.5	1.6	1.4	1.7
E.Anat.	1.6	1.4	1.5	1.4	1.3	1.3	1.4	1.3	1.3	1.3	1.2	1.4
SE.Anat.	1.7	1.4	1.6	1.6	1.4	1.4	1.4	1.5	1.4	1.5	1.5	1.3
Coastal	2.4	2.4	2.7	3.1	3.7	4.0	4.1	4.4	4.2	4.1	2.7	2.4
Inner	1.8	1.7	1.7	1.7	1.6	1.6	1.7	1.6	1.6	1.7	1.6	1.7
TURKEY	2.2	2.2	2.4	2.7	3.2	3.4	3.6	3.8	3.6	3.4	2.3	2.1
Overall visitors' average length of stay in 1995												
Marmara	2.0	2.2	2.1	2.0	2.1	2.1	2.2	2.2	2.0	2.1	2.1	2.1
Aegean	1.7	1.9	1.9	2.9	3.7	4.2	4.1	4.2	3.7	3.4	1.7	1.7
Mediter.	3.6	3.8	4.2	4.6	5.1	5.8	5.4	5.7	5.4	5.2	4.0	3.5
C.Anat.	1.8	1.9	1.8	1.8	1.9	2.0	1.9	1.8	1.8	1.8	1.9	1.9
B.Sea	1.6	1.6	1.5	1.4	1.4	1.4	1.4	1.5	1.4	1.4	1.5	1.5
E.Anat.	1.3	1.5	1.7	1.6	1.4	1.5	1.4	1.5	1.5	1.6	1.3	1.4
SE.Anat.	1.3	1.3	1.4	1.4	1.4	1.4	1.4	1.4	1.5	1.6	1.6	1.3
Coastal	2.2	2.5	2.6	3.1	3.7	4.0	4.1	4.1	3.8	3.5	2.5	2.3
Inner	1.6	1.7	1.7	1.6	1.7	1.7	1.6	1.7	1.6	1.7	1.7	1.7
TURKEY	2.0	2.2	2.3	2.7	3.2	3.4	3.5	3.5	3.2	3.1	2.2	2.1
Overall visitors' average length of stay in 1996												
Marmara	2.2	2.2	2.1	2.1	2.1	2.1	2.2	2.2	2.0	2.0	2.0	2.1
Aegean	2.2	2.3	2.0	3.1	3.9	3.8	3.8	3.7	3.6	3.5	2.1	2.0
Mediter.	3.5	3.9	4.2	5.2	5.9	5.8	6.2	5.4	5.7	6.2	3.3	3.6
C.Anat.	1.8	1.9	1.9	1.9	1.8	1.9	1.8	1.7	1.8	1.9	1.8	1.7
B.Sea	1.7	1.6	1.5	1.5	1.5	1.5	1.5	1.5	1.4	1.5	1.4	1.6
E.Anat.	1.6	1.8	1.5	1.5	1.5	1.4	1.5	1.5	1.4	1.5	1.6	1.5
SE.Anat.	1.4	1.4	1.5	1.4	1.4	1.3	1.6	1.5	1.4	1.4	1.6	1.4
Coastal	2.5	2.6	2.7	3.4	3.9	4.0	4.2	3.9	3.8	3.8	2.4	2.4
Inner	1.7	1.8	1.7	1.7	1.6	1.6	1.6	1.5	1.6	1.7	1.6	1.6
TURKEY	2.3	2.4	2.4	2.9	3.4	3.4	3.6	3.4	3.3	3.3	2.1	2.2

Appendix 82. Seasonal indices for number of permanent, seasonal and overall staff by region (1994-1996)

	Seasonality of no of PERMANENT STAFF by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	108	104	102	103	104	105	98	99	96	94	93	92	1200
Aegean	79	81	84	113	128	120	120	119	115	105	68	68	1200
Mediterranean	68	66	81	120	125	130	130	122	116	110	69	62	1200
C.Anatolia	102	99	99	101	103	104	102	99	99	99	93	99	1200
Black Sea	107	111	110	101	100	99	96	97	97	96	94	94	1200
E.Anatolia	111	106	108	104	112	104	100	97	99	99	84	76	1200
SE.Anatolia	124	126	118	116	111	110	68	69	74	103	96	86	1200
Coastal	87	85	90	111	117	118	114	112	108	103	79	76	1200
Inner	105	104	103	103	104	103	101	97	97	97	91	93	1200
TURKEY	91	89	93	109	114	115	111	109	105	101	82	80	1200

	Seasonality of no of TEMPORARY STAFF by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	105	75	79	67	110	126	120	132	116	86	89	95	1200
Aegean	19	22	25	123	165	174	170	168	160	121	27	25	1200
Mediterranean	12	12	39	131	151	160	183	164	153	136	35	23	1200
C.Anatolia	22	28	53	128	125	152	122	130	154	128	75	83	1200
Black Sea	179	107	91	78	48	62	99	104	83	79	76	194	1200
E.Anatolia	139	129	127	127	98	82	96	94	86	63	97	62	1200
SE.Anatolia	83	106	81	29	98	116	76	55	85	132	167	173	1200
Coastal	23	22	37	123	153	163	171	162	152	126	37	31	1200
Inner	80	67	75	112	103	117	116	115	123	102	81	109	1200
TURKEY	26	23	39	122	151	161	167	160	151	125	40	35	1200

	Seasonality of no of OVERALL STAFF by region (1994-1996)												
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Tot.
Marmara	108	102	100	100	104	107	100	102	98	94	93	92	1200
Aegean	53	55	58	118	145	143	141	139	134	112	51	50	1200
Mediterranean	45	44	64	124	136	143	151	139	131	121	56	46	1200
C.Anatolia	97	95	96	103	105	106	103	101	103	101	92	98	1200
Black Sea	112	110	108	99	96	97	96	97	96	94	93	103	1200
E.Anatolia	116	110	112	108	110	99	99	97	97	93	85	74	1200
SE.Anatolia	121	125	115	112	110	111	68	68	75	105	101	91	1200
Coastal	67	65	73	115	129	132	132	127	121	110	67	62	1200
Inner	103	101	101	103	104	104	102	99	100	98	91	94	1200
TURKEY	73	71	78	113	124	127	127	122	117	108	71	68	1200

Appendix 83. The seasonal indices for permanent staff by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	100	105	104	104	104	111	103	90	101	96	100	82
	Aydin	56	63	68	105	156	135	129	142	125	122	45	55
	Denizli	118	113	113	119	117	113	101	95	84	83	75	70
	Izmir	100	101	101	112	113	106	107	102	99	95	82	81
	Kutahya	105	101	105	99	100	99	106	105	89	101	100	89
	Manisa	102	102	102	103	111	86	87	103	102	99	97	104
	Mugla	33	32	39	130	152	155	155	149	155	119	42	40
	Usak	103	104	104	104	103	88	99	99	100	97	99	101
Black Sea	Amasya	113	109	111	112	113	60	87	90	91	88	96	132
	Artvin	107	99	98	97	97	106	87	83	108	106	109	105
	Bolu	111	123	117	98	99	97	93	91	91	94	93	93
	Corum	111	110	103	97	90	91	107	103	97	91	92	108
	Giresun	91	98	99	98	92	137	108	107	104	91	89	88
	Gumushane	85	85	84	103	110	96	96	97	99	124	126	95
	Kastamonu	84	100	110	113	114	100	98	106	109	91	90	85
	Ordu	105	100	100	98	100	99	107	112	102	91	96	89
	Rize	132	124	131	119	107	104	86	76	69	83	81	88
	Samsun	88	102	102	98	101	103	90	101	101	106	107	100
	Sinop	97	90	101	104	109	104	105	114	110	99	83	82
	Tokat	120	115	114	109	110	107	55	55	131	132	77	76
	Trabzon	100	101	106	102	95	103	109	106	100	93	94	90
	Zonguldak	106	107	104	97	92	96	104	104	93	100	103	94
	Bartin	107	90	106	99	99	95	110	106	100	102	95	92
	Karabuk	89	88	75	63	57	83	167	176	180	68	74	79
C.Anatolia	Ankara	105	102	101	99	100	100	101	102	99	98	92	102
	Cankiri	99	98	108	96	99	100	99	119	96	102	93	90
	Eskisehir	98	101	100	104	97	99	94	102	101	103	103	98
	Kayseri	107	101	105	99	106	99	102	94	98	97	96	95
	Kirsehir	91	105	106	94	102	99	100	112	87	100	104	99
	Konya	98	90	100	105	109	112	106	94	100	94	97	96
	Nevsehir	94	93	93	104	116	108	114	85	104	104	92	94
	Nigde	116	114	107	99	95	108	111	102	84	96	92	77
	Sivas	96	107	103	98	101	99	108	96	101	97	99	96
	Yozgat	97	89	68	137	94	133	102	99	92	102	91	96
	Aksaray	84	82	82	116	116	147	101	99	100	96	92	85
	Karaman	104	102	110	103	101	103	101	100	91	97	95	94
	Kirikkale	119	96	100	87	114	75	107	91	93	96	111	110
E.Anatolia	Agri	95	91	84	87	136	136	149	103	103	107	51	58
	Bingol	95	94	102	102	88	107	95	110	106	103	101	96
	Bitlis	110	54	50	47	81	72	115	138	159	165	134	76
	Elazig	106	104	111	126	115	109	120	119	106	102	38	43
	Erzincan	128	121	133	154	207	150	46	58	58	52	41	50
	Erzurum	115	106	110	98	109	99	94	94	99	97	92	87
	Hakkari	115	122	118	120	104	94	104	94	95	84	87	63
	Kars	148	87	124	117	88	142	67	88	91	116	51	80
	Malatya	125	119	117	103	110	102	96	92	88	91	87	70
	Tunceli	120	118	99	114	119	110	81	78	87	94	87	92
	Van	97	101	107	106	103	93	102	99	106	109	97	81
	Igdir	122	120	95	106	126	109	111	100	95	82	73	62
Marmara	Balikesir	91	92	82	99	114	113	121	120	112	96	80	80
	Bilecik	119	109	96	120	112	106	104	94	91	87	82	78
	Bursa	107	105	103	97	100	116	93	92	97	95	98	96
	Canakkale	115	112	117	115	127	109	99	92	88	83	72	71
	Edirne	96	106	100	97	104	113	107	99	97	101	84	96
	Istanbul	110	105	104	103	103	103	96	97	95	95	95	93
	Kirklareli	113	112	109	108	102	86	98	96	95	94	97	89
	Kocaeli	105	104	104	101	103	103	106	108	101	88	87	89
	Sakarya	112	106	105	106	82	108	120	113	88	59	108	93
	Tekirdag	75	80	86	87	110	111	102	169	144	82	78	77
	Yalova	72	71	66	54	59	55	122	114	114	111	111	252
Mediterran	Adana	103	102	102	102	103	101	84	103	103	95	100	101
	Antalya	61	60	77	122	129	135	138	127	120	113	64	55
	Burdur	95	115	112	126	116	98	89	89	90	91	89	89
	Hatay	98	99	99	105	110	106	97	93	96	106	92	100
	Isparta	120	127	127	95	97	90	89	91	77	77	104	104
	Icel	94	86	101	108	110	115	107	109	105	97	85	83
	Kah. Maras	106	95	109	105	104	106	98	89	89	123	89	87
SE.Anatoli	Adiyaman	85	82	73	113	98	102	123	114	110	96	96	107
	Diyarbakir	113	108	112	114	99	99	96	100	94	91	84	91
	Gaziantep	121	115	113	106	107	105	99	98	90	97	94	55
	Mardin	122	135	126	113	88	93	82	77	113	88	80	84
	Siirt	84	129	121	118	119	109	92	96	93	85	87	67
	Sanli Urfa	103	141	101	71	114	104	100	88	90	93	95	99
	Batman	129	135	115	125	109	116	94	89	86	58	84	59
	Sirnak	98	87	95	106	107	93	108	108	109	110	81	98
TURKEY TOTAL		91	89	93	109	114	115	111	109	105	101	82	80

Appendix 84. The seasonal indices for temporary staff by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	1.19	0.34	0.00	0.42	0.26	0.63	0.83	0.14	0.22	0.56	0.88	6.53
	Aydin	0.11	0.08	0.26	1.11	1.70	1.86	1.95	1.74	1.64	1.14	0.20	0.21
	Denizli	0.04	0.21	0.51	1.81	1.71	1.75	1.63	1.62	1.41	0.90	0.22	0.19
	Izmir	0.51	0.52	0.34	0.98	1.56	1.47	1.53	1.57	1.51	1.09	0.49	0.42
	Kutahya	-	-	-	-	-	-	-	-	-	-	-	-
	Manisa	0.82	0.66	0.91	0.54	0.88	1.24	1.14	1.17	0.87	1.33	1.09	1.34
	Mugla	0.08	0.14	0.20	1.45	1.69	1.81	1.66	1.70	1.61	1.28	0.20	0.18
	Usak	-	-	-	-	-	-	-	-	-	-	-	-
Black Sea	Amasya	0.00	0.60	0.60	0.59	0.61	0.65	2.41	2.30	1.53	1.22	0.71	0.79
	Artvin	0.00	0.00	0.00	1.16	0.00	1.40	0.44	0.56	3.82	3.20	0.65	0.78
	Bolu	2.44	1.19	1.03	0.79	0.21	0.38	0.72	0.71	0.66	0.71	0.77	2.39
	Corum	0.54	0.00	0.00	0.00	0.00	0.00	0.39	0.42	0.46	0.88	0.61	8.71
	Giresun	0.34	0.00	1.42	1.68	1.90	0.80	1.31	1.34	1.03	0.54	0.81	0.83
	Gumushane	-	-	-	-	-	-	-	-	-	-	-	-
	Kastamonu	0.32	0.00	0.00	2.71	2.67	0.59	1.46	0.86	0.00	1.17	0.94	1.28
	Ordu	1.22	3.24	0.52	0.98	0.82	0.57	0.85	1.08	0.32	0.30	0.32	1.78
	Rize	0.88	1.00	0.94	0.58	1.14	1.17	1.12	1.10	1.06	1.06	0.71	1.24
	Samsun	0.98	0.86	0.73	1.22	0.54	0.51	1.77	1.95	1.95	0.00	0.00	1.50
	Sinop	0.00	0.99	0.00	0.00	0.00	1.43	6.48	3.11	0.00	0.00	0.00	0.00
	Tokat	0.00	0.00	0.00	0.00	0.00	0.00	3.77	3.64	1.71	2.25	0.30	0.32
	Trabzon	1.48	0.97	0.96	0.46	0.83	0.96	0.40	1.10	1.13	0.90	1.33	1.49
	Zonguldak	-	-	-	-	-	-	-	-	-	-	-	-
	Bartin	0.58	1.62	0.00	0.84	1.19	1.60	2.47	1.14	1.57	1.01	0.00	0.00
	Karabuk	0.00	2.01	0.00	0.00	0.00	1.29	1.29	1.39	6.02	0.00	0.00	0.00
C.Anatolia	Ankara	0.38	0.38	0.40	0.38	0.43	1.37	0.74	1.63	0.92	3.43	0.48	1.46
	Cankiri	0.83	0.60	0.70	0.00	0.00	0.00	0.82	0.40	0.77	0.00	2.90	4.98
	Eskisehir	1.07	0.85	0.93	1.24	1.20	1.17	0.91	0.94	1.27	0.80	0.83	0.80
	Kayseri	0.58	1.07	0.46	0.45	0.41	0.36	1.78	0.83	1.14	0.94	2.25	1.73
	Kirsehir	-	-	-	-	-	-	-	-	-	-	-	-
	Konya	0.58	0.88	0.74	0.75	0.72	0.67	1.23	1.46	1.14	1.18	1.42	1.25
	Nevsehir	0.07	0.15	0.52	1.51	1.44	1.68	1.34	1.31	1.38	1.30	0.63	0.68
	Nigde	-	-	-	-	-	-	-	-	-	-	-	-
	Sivas	-	-	-	-	-	-	-	-	-	-	-	-
	Yozgat	-	-	-	-	-	-	-	-	-	-	-	-
	Aksaray	0.00	0.00	0.00	2.07	0.00	1.50	0.00	1.69	6.59	0.05	0.05	0.05
	Karaman	-	-	-	-	-	-	-	-	-	-	-	-
	Kirikkale	0.68	0.88	2.01	1.86	0.25	1.52	0.42	0.54	0.98	0.56	1.41	0.88
E.Anatolia	Agri	0.87	0.73	0.62	0.55	2.48	2.43	1.19	0.68	1.19	0.51	0.47	0.27
	Bingol	1.93	0.75	0.54	0.46	0.43	1.04	0.60	1.16	1.12	1.09	1.06	1.84
	Bitlis	0.77	0.40	0.41	0.40	1.83	2.50	1.04	1.01	1.10	0.62	1.24	0.68
	Elazig	-	-	-	-	-	-	-	-	-	-	-	-
	Erzincan	-	-	-	-	-	-	-	-	-	-	-	-
	Erzurum	1.73	1.77	1.73	1.68	0.94	0.57	0.82	0.97	0.59	0.51	0.34	0.34
	Hakkari	0.00	0.29	0.50	1.14	1.12	0.83	1.78	1.88	1.22	1.00	1.80	0.45
	Kars	0.21	1.55	0.00	0.53	0.46	0.00	2.64	2.03	0.07	0.32	3.08	1.10
	Malatya	-	-	-	-	-	-	-	-	-	-	-	-
	Tunceli	0.00	0.00	0.37	1.29	1.01	0.87	0.53	3.58	0.83	0.64	1.59	1.29
	Van	1.24	0.92	0.71	1.01	1.04	1.14	0.96	0.78	1.18	1.09	0.74	1.20
	Igdir	0.96	0.00	1.35	0.35	0.86	0.00	0.35	0.47	0.61	0.37	0.50	6.19
Marmara	Balikesir	0.12	0.13	0.22	0.57	1.48	2.00	2.07	2.09	1.57	1.13	0.44	0.19
	Bilecik	-	-	-	-	-	-	-	-	-	-	-	-
	Bursa	1.90	1.88	1.72	0.35	0.34	0.46	0.28	0.20	0.19	0.48	1.70	2.50
	Canakkale	0.05	0.05	0.71	1.17	2.01	1.80	1.45	1.53	1.35	1.01	0.45	0.43
	Edirne	0.47	0.49	0.40	0.86	0.72	1.32	2.19	1.73	1.22	0.67	0.75	1.19
	Istanbul	1.46	0.79	0.80	0.83	1.03	0.95	1.08	1.21	1.29	0.84	0.86	0.87
	Kirklareli	0.00	0.00	0.35	0.00	1.20	3.20	1.58	1.05	1.37	1.56	0.61	1.08
	Kocaeli	0.65	0.93	0.76	0.00	0.42	0.38	0.04	1.24	1.21	2.88	1.23	2.26
	Sakarya	-	-	-	-	-	-	-	-	-	-	-	-
	Tekirdag	0.08	0.11	0.00	0.10	1.35	2.56	2.39	3.37	1.36	0.49	0.09	0.10
	Yalova	0.00	0.00	0.35	0.90	0.45	0.55	1.15	1.27	1.30	0.99	0.66	4.38
Mediterran	Adana	0.35	0.10	0.68	0.91	0.97	1.36	1.23	1.05	1.13	0.95	1.44	1.83
	Antalya	0.12	0.11	0.37	1.31	1.51	1.61	1.85	1.64	1.55	1.37	0.34	0.22
	Burdur	-	-	-	-	-	-	-	-	-	-	-	-
	Hatay	0.51	0.44	2.35	1.11	0.47	0.25	0.94	0.94	2.95	0.58	0.62	0.84
	Isparta	1.05	1.07	1.17	0.98	1.02	1.12	0.83	1.00	0.96	0.94	0.94	0.93
	Icel	0.27	0.57	1.02	1.07	1.35	1.46	1.18	1.69	1.03	1.11	0.63	0.62
	Kah. Maras	0.00	0.00	0.00	0.00	0.00	0.00	0.64	0.70	0.78	0.85	7.95	1.08
SE.Anatoli	Adiyaman	0.28	0.80	0.31	0.00	0.62	1.13	1.23	0.95	1.59	1.43	2.07	1.59
	Diyarbakir	1.24	1.71	0.86	0.00	0.87	0.98	1.12	0.76	1.31	0.97	0.72	1.45
	Gaziantep	-	-	-	-	-	-	-	-	-	-	-	-
	Mardin	1.09	0.98	1.13	0.50	0.49	0.41	0.38	0.43	1.37	2.03	0.93	2.26
	Siirt	0.15	0.00	0.80	0.27	0.36	0.96	1.42	1.44	1.47	1.56	1.64	1.93
	Sanli Urfa	-	-	-	-	-	-	-	-	-	-	-	-
	Batman	2.91	0.33	0.65	0.59	2.12	0.66	0.93	0.89	0.81	0.00	1.59	0.51
	Sirnak	3.12	3.12	0.96	0.83	1.67	0.00	0.00	0.00	0.00	0.00	1.25	1.04
TURKEY TOTAL		0.26	0.23	0.39	1.22	1.51	1.61	1.67	1.60	1.51	1.25	0.40	0.35

Appendix 85. The seasonal indices for overall staff by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	1.01	1.04	1.04	1.04	1.04	1.11	1.02	0.89	1.00	0.96	1.00	0.84
	Aydin	0.34	0.35	0.47	1.08	1.63	1.61	1.62	1.58	1.44	1.19	0.33	0.38
	Denizli	1.12	1.08	1.09	1.23	1.19	1.16	1.05	0.98	0.87	0.83	0.72	0.67
	Izmir	0.85	0.86	0.80	1.08	1.27	1.19	1.21	1.19	1.15	0.99	0.72	0.69
	Kutahya	1.04	1.00	1.05	0.99	0.99	0.99	1.04	1.04	1.01	1.00	0.99	0.88
	Manisa	1.00	0.97	1.01	0.97	1.09	0.91	0.90	1.05	1.01	1.04	0.99	1.08
	Mugla	0.16	0.20	0.26	1.40	1.63	1.72	1.62	1.63	1.58	1.25	0.28	0.26
	Usak	1.02	1.03	1.04	1.03	1.03	0.88	1.02	0.99	0.99	0.97	0.99	1.00
Black Sea	Amasya	1.08	1.08	1.10	1.11	1.11	0.60	0.92	0.95	0.93	0.89	0.95	1.28
	Artvin	0.98	0.92	0.92	0.96	0.93	1.07	0.87	0.87	1.28	1.08	1.07	1.05
	Bolu	1.27	1.19	1.14	0.95	0.90	0.91	0.91	0.89	0.89	0.91	0.91	1.13
	Corum	1.11	1.08	1.02	0.96	0.89	0.90	1.06	1.03	0.97	0.93	0.92	1.13
	Giresun	0.89	0.92	1.03	1.02	0.97	1.34	1.09	1.09	1.04	0.88	0.87	0.87
	Gumushane	0.75	0.75	0.80	0.92	1.02	0.94	0.92	0.94	0.96	1.56	1.19	1.25
	Kastamonu	0.82	0.94	1.04	1.25	1.26	0.99	1.00	1.03	1.01	0.91	0.89	0.85
	Ordu	1.05	1.04	1.00	1.00	1.01	0.98	1.09	1.13	0.97	0.88	0.93	0.90
	Rize	1.27	1.22	1.27	1.09	1.07	1.04	0.90	0.81	0.73	0.86	0.80	0.93
	Samsun	0.87	1.01	1.01	0.98	1.01	1.03	0.93	1.03	1.04	1.04	1.05	1.01
	Sinop	0.95	0.92	0.97	1.00	1.04	1.10	1.15	1.17	1.08	0.98	0.82	0.81
	Tokat	1.13	1.08	1.07	1.03	1.05	1.02	0.74	0.73	1.33	1.36	0.74	0.73
	Trabzon	1.02	1.01	1.05	0.98	0.94	1.03	1.04	1.04	1.00	0.93	0.99	0.96
	Zonguldak	1.06	1.08	1.04	0.97	0.91	0.96	1.04	1.04	0.93	1.00	1.03	0.95
	Bartin	1.06	0.91	1.02	0.98	1.00	0.97	1.15	1.09	1.01	1.01	0.92	0.89
	Karabuk	0.87	0.90	0.73	0.61	0.55	0.85	1.68	1.76	1.86	0.67	0.73	0.77
C.Anatolia	Ankara	1.04	1.01	1.00	0.99	1.00	1.00	1.00	1.04	1.00	1.00	0.92	1.03
	Cankiri	1.02	0.96	1.07	0.85	0.89	0.92	1.01	1.06	1.01	0.83	1.13	1.24
	Eskisehir	0.99	1.00	0.99	1.06	0.99	1.00	0.94	1.01	1.04	1.01	1.02	0.96
	Kayseri	1.05	1.01	1.03	0.97	1.04	0.98	1.01	0.93	0.98	0.98	1.03	0.98
	Kirsehir	0.91	1.05	1.06	0.93	1.02	0.99	1.00	1.12	0.86	1.05	1.03	0.98
	Konya	0.94	0.89	0.99	1.03	1.08	1.11	1.07	0.98	1.00	0.96	1.00	0.96
	Nevsehir	0.74	0.75	0.83	1.15	1.23	1.23	1.18	0.95	1.11	1.10	0.86	0.88
	Nigde	1.13	1.11	1.04	0.97	0.93	1.13	1.16	1.05	0.88	0.93	0.90	0.76
	Sivas	0.95	1.06	1.02	0.98	1.00	0.98	1.09	0.95	1.00	0.98	0.98	0.99
	Yozgat	0.97	0.89	0.68	1.36	0.93	1.33	1.02	0.99	0.92	1.02	0.93	0.96
	Aksaray	0.80	0.78	0.79	1.15	1.14	1.45	0.95	0.94	1.40	0.91	0.87	0.81
	Karaman	1.03	1.00	1.08	1.01	0.98	1.09	1.02	1.00	0.92	0.97	0.96	0.93
	Kirikkale	1.11	0.94	1.08	0.97	0.96	0.90	0.98	0.87	0.98	0.92	1.22	1.09
E.Anatolia	Agri	0.92	0.86	0.79	0.79	1.47	1.46	1.52	1.02	1.06	1.04	0.51	0.54
	Bingol	1.01	0.89	0.97	0.94	0.80	1.06	0.95	1.09	1.08	1.05	1.02	1.12
	Bitlis	0.97	0.49	0.49	0.47	1.17	1.30	1.20	1.26	1.41	1.01	1.43	0.79
	Elazig	1.03	1.01	1.08	1.22	1.12	1.41	1.16	1.15	1.03	1.00	0.37	0.43
	Erzincan	1.27	1.20	1.39	1.52	2.12	1.48	0.46	0.58	0.57	0.51	0.40	0.49
	Erzurum	1.32	1.27	1.28	1.17	1.03	0.82	0.93	0.92	0.89	0.85	0.79	0.74
	Hakkari	0.85	1.01	1.01	1.16	1.05	0.91	1.22	1.18	0.96	0.87	1.18	0.58
	Kars	1.31	0.83	1.04	1.02	0.81	1.27	0.74	0.99	0.74	1.02	1.37	0.88
	Malatya	1.22	1.17	1.16	1.02	1.09	1.01	1.02	0.93	0.89	0.92	0.86	0.71
	Tunceli	0.96	0.93	0.85	1.10	1.16	1.08	0.81	1.02	0.93	0.92	1.16	1.07
	Van	0.99	1.00	1.04	1.06	1.03	0.95	1.00	0.96	1.09	1.10	0.96	0.83
	Igdir	1.25	1.10	1.05	1.00	1.25	1.03	1.00	0.95	0.94	0.80	0.73	0.88
Marmara	Balikesir	0.70	0.71	0.65	0.87	1.23	1.37	1.44	1.44	1.24	1.01	0.71	0.64
	Bilecik	1.19	1.09	0.96	1.20	1.11	1.05	1.04	0.98	0.91	0.87	0.82	0.78
	Bursa	1.21	1.18	1.14	0.89	0.91	1.07	0.81	0.79	0.84	0.91	1.09	1.16
	Canakkale	0.83	0.81	1.04	1.14	1.47	1.27	1.12	1.08	1.01	0.90	0.67	0.65
	Edirne	0.92	1.01	0.95	0.96	1.01	1.14	1.15	1.05	0.99	0.98	0.84	0.99
	Istanbul	1.12	1.03	1.02	1.02	1.03	1.03	0.97	0.99	0.97	0.95	0.94	0.93
	Kirklareli	1.08	1.07	1.06	1.03	1.03	0.95	1.02	0.95	0.96	0.97	0.97	0.92
	Kocaeli	0.97	0.97	0.99	0.96	0.99	1.01	0.99	1.15	1.09	0.97	0.95	0.97
	Sakarya	1.11	1.06	1.05	1.06	0.82	1.08	1.21	1.14	0.88	0.59	1.08	0.93
	Tekirdag	0.51	0.56	0.57	0.60	1.16	1.56	1.50	2.47	1.31	0.69	0.54	0.54
	Yalova	0.69	0.68	0.64	0.55	0.58	0.55	1.19	1.11	1.10	1.10	1.09	2.73
Mediterran	Adana	1.02	1.00	1.02	1.02	1.02	1.01	0.86	1.03	1.03	0.95	1.01	1.02
	Antalya	0.39	0.38	0.59	1.26	1.39	1.46	1.59	1.43	1.35	1.24	0.51	0.40
	Burdur	0.94	1.13	1.11	1.23	1.24	1.02	0.88	0.88	0.89	0.90	0.88	0.89
	Hatay	0.98	0.98	1.00	1.04	1.09	1.05	0.97	0.94	0.99	1.05	0.92	1.01
	Isparta	1.16	1.21	1.24	0.96	0.99	0.97	0.87	0.93	0.82	0.82	1.01	1.01
	Icel	0.85	0.82	1.01	1.07	1.13	1.20	1.09	1.17	1.04	0.99	0.82	0.81
	Kah. Maras	0.98	0.89	1.03	1.01	1.01	1.05	0.98	0.91	0.93	1.24	1.02	0.94
SE.Anatoli	Adiyaman	0.76	0.86	0.67	0.94	0.98	1.09	1.18	1.06	1.16	1.01	1.13	1.14
	Diyarbakir	1.13	1.12	1.10	1.08	0.98	0.99	0.97	0.99	0.97	0.92	0.83	0.92
	Gaziantep	1.20	1.14	1.12	1.05	1.06	1.05	0.98	0.97	0.89	0.96	0.99	0.59
	Mardin	1.17	1.29	1.23	1.08	0.85	0.90	0.80	0.77	1.21	0.96	0.84	0.92
	Siirt	0.72	1.09	1.08	1.07	1.09	1.05	1.01	1.01	1.03	0.99	0.99	0.85
	Sanli Urfa	0.99	1.39	1.00	0.70	1.14	1.04	1.09	0.90	0.92	0.95	0.92	0.96
	Batman	1.35	1.28	1.11	1.21	1.15	1.12	0.96	0.90	0.87	0.52	0.93	0.59
	Sirnak	0.98	0.87	0.96	1.06	1.11	0.90	1.07	1.07	1.07	1.09	0.83	0.99
TURKEY TOTAL		0.73	0.71	0.78	1.13	1.24	1.27	1.27	1.22	1.17	1.08	0.71	0.68

Appendix 86. The seasonal indices for no of foreign visitors by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	0.32	0.28	0.83	1.16	1.46	1.20	1.84	1.54	1.72	1.10	0.31	0.24
	Aydin	0.12	0.12	0.29	1.01	1.55	1.73	1.91	2.27	1.67	1.13	0.11	0.07
	Denizli	0.28	0.40	0.74	1.18	1.29	1.25	1.61	1.81	1.78	0.96	0.50	0.20
	Izmir	0.35	0.37	0.62	1.06	1.33	1.32	1.48	1.73	1.67	1.26	0.44	0.39
	Kutahya	0.36	0.25	0.29	1.41	1.58	0.69	0.71	0.79	1.33	2.92	1.29	0.38
	Manisa	0.89	0.94	0.83	1.77	0.79	0.95	0.99	0.98	1.18	1.02	0.58	1.06
	Mugla	0.09	0.12	0.24	1.02	1.50	1.77	1.90	2.06	1.91	1.25	0.10	0.04
	Usak	1.01	0.81	0.91	0.82	0.80	0.88	2.21	1.26	1.11	1.03	0.62	0.54
Black Sea	Amasya	0.07	0.05	0.16	1.60	1.73	1.51	1.20	2.10	2.19	1.02	0.10	0.26
	Artvin	0.97	0.47	0.95	0.89	1.28	0.69	1.03	0.76	1.39	1.32	1.45	0.81
	Bolu	0.08	0.11	0.15	1.29	1.75	1.53	1.50	2.20	2.10	1.10	0.09	0.11
	Corum	0.16	0.08	0.11	1.37	2.47	1.04	1.38	1.58	1.64	1.51	0.50	0.15
	Giresun	0.61	0.60	0.68	0.80	0.85	1.50	1.86	1.73	1.47	0.81	0.60	0.50
	Gumushane	0.00	0.00	0.00	0.13	2.20	4.36	2.82	0.54	1.70	0.26	0.00	0.00
	Kastamonu	0.36	0.33	0.35	0.41	0.98	1.77	1.10	1.76	0.91	0.81	2.39	0.82
	Ordu	0.59	0.58	0.81	0.73	1.01	1.30	1.93	1.96	1.32	0.87	0.61	0.29
	Rize	1.08	0.55	1.22	1.20	1.08	1.22	1.64	0.63	0.92	0.88	0.55	1.02
	Samsun	0.77	0.54	0.54	0.96	1.10	1.05	1.45	1.53	1.61	1.32	0.44	0.69
	Sinop	0.43	0.27	0.56	1.18	2.02	0.97	1.49	1.68	1.15	0.76	0.82	0.67
	Tokat	0.22	0.12	2.69	0.65	1.11	0.86	0.60	1.22	1.71	1.29	0.27	1.27
	Trabzon	0.77	0.80	0.88	0.67	0.77	1.01	1.12	1.32	1.15	1.10	1.26	1.16
	Zonguldak	0.64	0.52	0.27	0.73	0.31	0.06	1.31	3.00	1.73	2.75	0.64	0.05
	Bartin	0.28	0.12	0.58	2.06	0.45	0.70	0.78	5.02	0.88	0.65	0.48	0.00
	Karabuk	0.25	1.20	1.06	0.66	0.39	0.75	3.04	2.03	2.00	0.18	0.25	0.19
C.Anatolia	Ankara	0.56	0.55	0.81	0.98	1.29	1.07	1.07	1.38	1.49	1.33	0.85	0.61
	Cankiri	0.00	0.95	1.67	2.40	4.45	0.00	0.33	0.27	0.41	0.75	0.34	0.43
	Eskisehir	0.52	0.45	0.70	1.67	1.47	1.36	1.10	0.97	1.17	1.25	0.59	0.75
	Kayseri	0.67	0.74	0.50	1.33	1.51	1.04	1.23	1.10	1.48	1.03	0.62	0.73
	Kirsehir	1.20	0.49	0.34	0.11	0.40	0.40	2.17	0.88	1.35	1.94	1.57	1.15
	Konya	0.54	0.42	0.83	1.43	1.61	1.15	1.17	1.15	1.51	1.26	0.52	0.41
	Nevsehir	0.33	0.38	0.59	1.21	1.47	1.14	1.11	1.46	1.68	1.34	0.77	0.52
	Nigde	-	-	-	-	-	-	-	-	-	-	-	-
	Sivas	0.12	0.26	0.21	0.20	1.35	0.21	1.97	2.67	0.99	2.62	1.18	0.23
	Yozgat	0.17	0.11	0.57	1.99	1.09	1.35	0.77	1.23	0.60	1.75	1.94	0.42
	Aksaray	0.08	0.10	0.16	1.34	1.79	1.12	1.62	2.42	2.51	0.45	0.23	0.19
	Karaman	1.05	0.97	0.46	1.50	0.56	1.43	1.12	0.81	0.82	1.45	0.76	1.07
	Kirikkale	0.24	0.39	0.76	0.07	4.50	0.39	1.08	1.63	1.28	0.87	0.54	0.25
E.Anatolia	Agri	0.78	0.53	0.64	0.47	0.72	1.32	1.66	1.57	1.58	1.53	0.69	0.51
	Bingol	0.40	0.29	2.88	0.85	0.53	0.75	1.82	1.71	1.15	1.03	0.58	0.00
	Bitlis	-	-	-	-	-	-	-	-	-	-	-	-
	Elazig	0.58	0.97	1.18	0.49	0.56	0.63	0.23	2.75	0.18	3.71	0.73	0.00
	Erzincan	0.49	1.30	2.78	2.08	1.00	0.49	0.23	0.92	0.36	1.56	0.77	0.04
	Erzurum	0.67	0.89	1.21	0.70	1.01	1.24	1.85	1.52	1.38	0.84	0.33	0.36
	Hakkari	2.72	0.89	0.56	0.00	0.00	0.00	0.00	1.35	0.72	0.37	0.73	4.65
	Kars	0.07	0.01	0.44	0.48	0.46	2.94	1.34	2.35	2.84	0.76	0.15	0.15
	Malatya	0.56	0.64	0.59	0.99	1.22	1.30	0.71	1.05	2.09	0.86	1.27	0.71
	Tunceli	-	-	-	-	-	-	-	-	-	-	-	-
	Van	0.88	0.56	0.70	1.08	1.17	1.26	1.07	1.59	1.45	1.02	0.63	0.60
	Igdir	1.49	0.87	1.33	1.06	1.13	1.08	0.53	0.75	0.77	1.04	1.06	0.89
Marmara	Balikesir	0.09	0.12	0.43	1.34	1.50	1.30	1.83	2.31	1.79	1.04	0.13	0.12
	Bilecik	0.83	0.62	0.73	0.67	0.84	1.03	1.59	0.70	0.75	2.36	0.91	0.96
	Bursa	0.24	0.31	0.61	1.01	1.39	0.87	1.68	2.28	1.61	1.20	0.45	0.36
	Canakkale	0.59	0.60	0.94	1.25	1.54	1.04	0.99	1.02	1.44	1.33	0.65	0.60
	Edirne	0.38	0.37	0.47	0.51	0.84	0.92	1.81	3.06	1.29	0.93	0.88	0.53
	Istanbul	0.74	0.81	1.05	1.05	1.01	0.97	1.04	1.25	1.23	1.10	0.96	0.79
	Kirklareli	0.60	1.48	1.08	1.02	1.00	0.57	1.37	1.38	1.34	0.85	0.76	0.54
	Kocaeli	0.93	0.65	1.08	0.89	1.22	0.97	1.04	1.19	1.11	1.00	1.09	0.83
	Sakarya	0.61	0.91	0.85	0.95	0.80	0.75	1.07	1.38	1.39	1.46	1.13	0.70
	Tekirdag	0.46	0.41	1.18	0.97	0.70	1.31	2.38	1.70	0.95	0.89	0.48	0.56
	Yalova	0.16	0.14	0.19	0.23	0.34	0.20	2.58	5.10	1.90	0.65	0.26	0.24
Mediterran	Adana	0.72	0.92	0.86	1.15	1.19	1.03	1.15	1.07	1.14	0.99	1.02	0.75
	Antalya	0.20	0.26	0.55	0.99	1.28	1.36	1.75	1.94	1.63	1.46	0.33	0.23
	Burdur	0.37	0.26	0.37	1.13	0.66	1.96	1.41	2.63	1.46	1.32	0.38	0.03
	Hatay	0.50	0.32	0.54	1.11	1.12	0.72	1.70	2.17	1.43	1.14	0.67	0.58
	Isparta	0.06	0.49	0.26	1.57	1.81	1.31	1.12	1.53	1.72	1.48	0.58	0.08
	Icel	0.75	0.38	0.69	0.99	1.16	1.17	1.33	1.74	1.39	1.35	0.56	0.48
	Kah. Maras	1.01	0.42	0.48	1.48	1.41	1.15	0.61	1.33	2.28	0.69	0.57	0.57
SE.Anatoli	Adivaman	0.12	0.03	0.22	0.33	1.29	1.34	2.90	2.41	2.05	0.84	0.36	0.11
	Diyarbakir	0.40	0.47	1.13	0.68	0.99	1.10	1.51	1.59	1.47	1.18	0.97	0.52
	Gaziantep	0.84	0.80	0.99	1.13	1.04	0.96	0.92	1.26	1.21	0.82	1.21	0.82
	Mardin	0.91	0.14	1.24	1.75	0.63	1.21	0.83	0.51	1.46	1.42	1.01	0.89
	Siirt	0.25	0.27	4.19	0.00	0.62	1.16	0.39	1.35	1.68	0.78	1.31	0.00
	Sanli Urfa	0.15	0.16	0.18	0.34	1.43	1.16	1.51	2.12	2.55	1.14	0.47	0.76
	Batman	0.86	2.04	3.78	0.00	1.27	0.00	0.16	0.00	1.80	0.33	0.34	1.44
	Sirnak	0.92	0.88	2.55	0.50	0.49	0.75	0.34	0.63	0.86	1.40	1.76	0.92
TURKEY TOTAL		0.42	0.47	0.71	1.05	1.24	1.22	1.43	1.67	1.52	1.23	0.59	0.45

Appendix 87. The seasonal indices for no of Turkish visitors by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	1.19	0.53	1.25	0.75	0.70	0.57	1.73	1.71	0.84	0.88	1.05	0.82
	Aydin	0.79	0.61	1.05	1.11	1.03	0.97	1.23	1.48	1.08	1.17	0.54	0.93
	Denizli	1.22	0.93	1.14	0.97	0.95	0.93	1.17	1.03	0.96	0.93	0.71	1.07
	Izmir	0.85	0.74	0.98	1.08	1.06	0.99	1.22	1.27	1.14	0.94	0.85	0.89
	Kutahya	0.68	0.44	0.77	1.07	1.10	1.03	1.17	1.29	1.23	1.12	1.25	0.84
	Manisa	0.91	0.73	1.05	1.07	0.92	1.06	1.02	1.07	1.22	0.97	1.02	0.96
	Mugla	0.30	0.38	0.50	1.11	1.26	1.24	1.93	2.32	1.45	0.85	0.34	0.34
	Usak	0.91	0.78	0.99	0.96	0.83	1.11	0.86	1.14	1.13	1.21	1.11	0.98
Black Sea	Amasya	0.79	0.68	1.09	1.02	0.86	0.82	1.16	1.25	1.16	1.06	1.09	1.02
	Artvin	0.85	0.41	0.92	0.90	1.16	1.09	0.97	0.98	1.23	1.25	1.23	1.01
	Bolu	1.08	0.98	1.16	1.00	0.82	0.77	0.87	1.03	0.83	1.00	1.14	1.34
	Corum	0.91	0.64	0.92	1.01	1.03	1.03	1.11	1.17	1.05	1.17	1.01	0.95
	Giresun	0.86	0.68	0.99	1.03	1.13	1.09	1.31	1.41	0.99	0.89	0.89	0.75
	Gumushane	0.42	0.48	0.39	1.93	0.56	0.59	0.70	1.97	1.10	1.71	1.41	0.75
	Kastamonu	0.97	0.75	0.95	0.94	0.98	0.79	1.11	1.06	1.06	1.12	1.16	1.11
	Ordu	0.71	0.70	0.95	0.87	1.27	1.20	1.63	1.47	1.06	0.70	0.70	0.73
	Rize	0.65	0.73	0.89	1.04	1.30	1.17	2.22	1.07	0.88	0.71	0.70	0.63
	Samsun	0.95	0.83	0.85	0.84	0.82	1.07	1.31	1.41	1.26	0.82	0.86	0.99
	Sinop	0.91	0.60	0.88	0.81	0.93	0.96	1.43	1.42	0.99	1.00	1.03	1.03
	Tokat	0.99	0.69	0.79	0.98	0.88	1.07	0.85	1.12	1.34	1.16	1.27	0.86
	Trabzon	0.71	0.65	0.90	1.01	1.18	1.18	1.33	1.24	1.11	1.03	0.96	0.71
	Zonguldak	0.89	0.66	1.29	1.12	0.98	0.89	0.82	1.01	1.13	1.39	0.88	0.93
	Bartin	0.69	0.63	0.71	1.00	1.10	1.14	1.42	1.80	1.07	0.94	0.75	0.76
	Karabuk	0.82	0.96	0.82	0.85	0.86	0.71	1.09	1.95	1.92	0.83	0.61	0.58
C.Anatolia	Ankara	0.97	0.67	1.02	1.02	1.04	1.07	0.95	0.96	1.14	1.06	1.12	0.97
	Cankiri	1.03	0.79	0.92	1.18	0.97	0.43	0.85	1.07	1.35	1.20	1.00	1.21
	Eskisehir	0.84	0.68	0.99	0.98	0.97	1.16	1.04	1.17	1.15	1.00	1.05	0.96
	Kayseri	1.01	0.80	1.06	1.01	0.98	0.98	0.86	0.91	1.15	1.17	1.13	0.95
	Kirsehir	0.55	0.88	0.77	0.71	0.97	0.92	1.50	1.59	1.07	1.59	0.68	0.79
	Konya	0.86	0.63	0.92	1.02	1.19	1.05	1.01	1.06	1.08	1.15	0.98	1.04
	Nevsehir	0.79	0.72	1.20	1.18	1.41	1.04	0.77	0.93	1.08	1.13	0.88	0.87
	Nigde	1.39	0.80	0.81	0.68	1.11	1.57	1.57	1.56	0.82	0.71	0.49	0.50
	Sivas	0.84	0.71	1.03	0.97	1.12	0.98	1.01	0.99	1.26	1.28	1.12	0.70
	Yozgat	0.55	0.60	0.94	1.05	1.28	0.92	0.66	1.35	0.93	1.44	1.40	0.87
	Aksaray	0.92	0.59	0.93	1.37	1.11	0.92	1.05	1.38	1.05	0.90	0.98	0.80
	Karaman	0.80	0.62	0.90	1.12	1.07	0.98	0.96	0.88	1.05	1.21	1.20	1.22
	Kirikkale	0.23	0.16	0.29	0.41	0.57	1.64	1.32	0.78	2.45	1.32	1.61	1.21
E.Anatolia	Agri	1.18	1.11	1.02	0.97	0.89	0.92	1.06	1.45	0.92	0.94	0.88	0.66
	Bingol	1.00	0.66	0.85	0.91	1.20	1.10	1.19	1.23	1.10	1.16	0.82	0.78
	Bitlis	0.27	0.33	0.70	0.95	1.52	2.39	1.71	2.90	0.47	0.47	0.30	0.00
	Elazig	0.75	0.59	1.08	0.97	0.98	1.11	1.09	1.06	1.16	0.94	1.07	1.21
	Erzincan	1.23	0.91	1.46	1.10	1.01	1.29	0.95	1.32	0.92	0.58	0.65	0.56
	Erzurum	0.94	0.77	0.97	0.85	1.10	1.11	1.06	1.12	1.11	1.09	1.01	0.87
	Hakkari	1.18	0.57	0.83	0.73	1.04	0.94	0.77	1.22	1.03	1.37	1.04	1.30
	Kars	0.54	0.36	0.93	0.82	0.23	0.77	1.80	1.96	1.02	1.23	1.74	0.60
	Malatya	0.88	0.76	0.97	1.04	1.02	1.13	1.21	0.95	1.17	1.08	0.90	0.88
	Tunceli	0.83	0.92	0.85	0.89	1.15	1.12	1.44	0.81	1.24	0.95	1.01	0.80
	Van	1.07	0.77	0.88	0.87	1.04	0.93	0.86	0.98	1.27	1.09	1.16	1.07
	Igdir	0.97	0.72	0.84	0.73	0.81	1.19	0.94	1.06	1.10	1.37	1.11	1.16
Marmara	Balikesir	0.76	0.64	0.92	0.96	1.00	0.96	1.43	1.65	1.16	0.90	0.80	0.82
	Bilecik	1.74	0.67	1.07	0.85	1.04	0.93	0.63	0.75	1.01	1.05	1.14	1.13
	Bursa	1.42	1.04	1.19	0.88	0.81	0.88	0.96	0.94	0.95	0.95	0.93	1.05
	Canakkale	0.74	0.75	1.15	1.08	1.01	1.11	1.28	1.29	1.02	1.00	0.81	0.76
	Edirne	0.78	0.81	1.07	0.89	0.90	1.03	1.21	1.32	1.03	0.98	1.15	0.85
	Istanbul	1.00	0.76	1.00	1.02	0.98	0.99	0.99	1.05	1.09	1.06	0.98	1.08
	Kirklareli	1.07	0.96	1.33	1.06	0.92	0.70	0.77	0.85	0.98	1.22	0.81	1.33
	Kocaeli	0.90	0.85	1.11	1.11	1.03	0.91	0.91	1.02	1.05	1.02	1.02	1.08
	Sakarya	1.01	0.84	1.00	1.01	1.12	0.97	0.98	1.00	0.99	1.12	0.92	1.04
	Tekirdag	0.61	0.48	0.85	0.92	0.83	1.17	1.99	2.21	1.10	0.63	0.64	0.57
	Yalova	0.52	0.48	0.45	0.47	0.66	0.65	1.11	1.29	1.40	1.80	1.65	1.52
Mediterran	Adana	0.94	0.86	0.95	1.01	0.99	0.98	1.06	0.94	1.06	1.10	1.09	1.01
	Antalya	0.51	0.45	0.66	0.93	1.38	1.15	1.79	1.84	1.41	0.96	0.45	0.48
	Burdur	0.81	0.59	1.16	1.06	1.07	1.01	1.04	1.31	1.06	1.06	0.94	0.88
	Hatay	0.86	0.70	1.08	1.09	0.94	0.95	1.13	1.06	1.01	0.95	1.14	1.08
	Isparta	0.91	0.57	0.79	0.77	1.01	1.32	0.96	0.98	1.19	0.94	1.25	1.30
	Icel	0.82	0.61	0.84	0.93	1.06	1.05	1.27	1.51	1.11	1.08	0.86	0.86
	Kah. Maras	1.15	0.77	1.07	1.04	1.13	1.12	0.79	0.98	1.04	0.99	1.02	0.92
SE.Anatoli	Adivaman	0.84	0.80	0.79	0.90	1.37	1.15	1.12	0.91	1.15	1.20	0.68	1.07
	Diyarbakir	1.01	0.76	0.95	1.01	1.04	1.01	0.97	1.01	1.10	0.99	1.12	1.04
	Gaziantep	1.14	0.83	0.99	1.05	1.04	1.00	0.90	0.96	0.98	1.03	1.06	1.03
	Mardin	1.36	0.78	0.82	1.08	1.17	1.07	0.67	0.72	1.16	1.03	1.05	1.10
	Siirt	1.10	0.71	1.03	0.90	0.76	0.92	0.88	0.90	1.07	1.32	1.39	1.02
	Sanli Urfa	0.95	0.57	0.95	1.19	1.10	0.84	0.95	1.27	1.23	0.85	0.95	1.15
	Batman	1.10	0.89	1.14	0.88	1.13	1.18	1.00	0.92	1.03	1.10	0.96	0.67
	Sirnak	1.49	0.98	0.90	0.90	0.49	0.95	0.30	0.74	0.76	0.91	1.47	2.10
TURKEY TOTAL		0.90	0.71	0.96	1.00	1.04	1.02	1.17	1.25	1.12	1.02	0.90	0.91

Appendix 88. The seasonal indices for no of overall visitors by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	1.16	0.52	1.23	0.77	0.73	0.59	1.73	1.70	0.86	0.88	1.02	0.80
	Aydin	0.36	0.30	0.57	1.05	1.37	1.47	1.66	1.97	1.45	1.14	0.27	0.38
	Denizli	0.60	0.57	0.87	1.11	1.19	1.15	1.46	1.53	1.49	0.95	0.58	0.49
	Izmir	0.65	0.59	0.83	1.07	1.17	1.13	1.32	1.45	1.35	1.06	0.69	0.69
	Kutahya	0.67	0.44	0.76	1.09	1.14	1.00	1.14	1.27	1.25	1.17	1.25	0.82
	Manisa	0.91	0.74	1.04	1.11	0.91	1.05	1.02	1.06	1.22	0.97	1.00	0.96
	Mugla	0.16	0.20	0.32	1.03	1.43	1.61	1.92	2.16	1.74	1.11	0.19	0.14
	Usak	0.91	0.78	0.99	0.95	0.82	1.10	0.91	1.15	1.13	1.20	1.10	0.96
Black Sea	Amasya	0.75	0.65	1.04	1.05	0.91	0.86	1.17	1.31	1.23	1.06	1.02	0.97
	Artvin	0.90	0.43	0.94	0.90	1.19	0.96	0.99	0.90	1.28	1.26	1.30	0.94
	Bolu	0.85	0.77	0.93	1.06	1.03	0.94	1.02	1.32	1.14	1.02	0.89	1.05
	Corum	0.88	0.61	0.88	1.02	1.10	1.03	1.13	1.19	1.08	1.19	0.98	0.91
	Giresun	0.85	0.68	0.98	1.02	1.12	1.10	1.32	1.42	1.01	0.89	0.88	0.74
	Gumushane	0.41	0.47	0.39	1.82	0.56	0.79	0.90	1.86	1.11	1.64	1.34	0.72
	Kastamonu	0.96	0.74	0.95	0.93	0.98	0.80	1.11	1.07	1.06	1.12	1.17	1.10
	Ordu	0.71	0.70	0.94	0.86	1.25	1.20	1.64	1.49	1.08	0.71	0.70	0.71
	Rize	0.73	0.70	1.00	1.09	1.25	1.19	2.07	0.96	0.89	0.74	0.67	0.73
	Samsun	0.94	0.82	0.84	0.84	0.83	1.07	1.32	1.42	1.27	0.84	0.84	0.97
	Sinop	0.90	0.59	0.87	0.82	0.96	0.96	1.44	1.43	1.00	0.99	1.03	1.02
	Tokat	0.96	0.68	0.87	0.97	0.88	1.06	0.85	1.11	1.35	1.17	1.23	0.87
	Trabzon	0.73	0.69	0.89	0.94	1.09	1.14	1.28	1.25	1.12	1.04	1.03	0.80
	Zonguldak	0.89	0.66	1.29	1.12	0.98	0.89	0.82	1.03	1.13	1.39	0.87	0.92
	Bartin	0.67	0.61	0.70	1.02	1.08	1.13	1.40	1.93	1.06	0.93	0.73	0.73
	Karabuk	0.79	0.98	0.84	0.84	0.83	0.72	1.16	1.97	1.95	0.79	0.59	0.56
C.Anatolia	Ankara	0.88	0.64	0.97	1.01	1.09	1.07	0.98	1.06	1.22	1.12	1.06	0.89
	Cankiri	1.02	0.79	0.92	1.18	0.99	0.43	0.83	1.07	1.35	1.20	1.00	1.21
	Eskisehir	0.82	0.67	0.97	1.02	0.98	1.17	1.05	1.16	1.16	1.02	1.03	0.95
	Kayseri	0.99	0.80	1.02	1.03	1.01	0.98	0.89	0.92	1.17	1.16	1.10	0.93
	Kirsehir	0.56	0.87	0.76	0.70	0.97	0.91	1.51	1.58	1.06	1.59	0.68	0.79
	Konya	0.77	0.57	0.89	1.14	1.31	1.08	1.06	1.08	1.20	1.18	0.85	0.85
	Nevsehir	0.51	0.50	0.81	1.20	1.44	1.11	0.99	1.27	1.46	1.26	0.81	0.64
	Nigde	1.36	0.79	0.82	0.68	1.12	1.57	1.57	1.56	0.84	0.71	0.48	0.49
	Sivas	0.82	0.70	1.00	0.94	1.12	0.95	1.04	1.05	1.25	1.33	1.12	0.69
	Yozgat	0.54	0.58	0.92	1.09	1.28	0.94	0.67	1.34	0.92	1.46	1.42	0.85
	Aksaray	0.61	0.42	0.66	1.35	1.32	0.98	1.26	1.78	1.60	0.74	0.71	0.58
	Karaman	0.80	0.63	0.89	1.12	1.06	0.99	0.98	0.88	1.04	1.22	1.18	1.21
	Kirikkale	0.24	0.19	0.33	0.40	0.60	1.63	1.30	0.79	2.41	1.33	1.58	1.19
E.Anatolia	Agri	1.03	0.90	0.88	0.78	0.83	1.08	1.29	1.48	1.18	1.15	0.82	0.60
	Bingol	0.99	0.66	0.88	0.91	1.19	1.10	1.19	1.24	1.10	1.16	0.82	0.77
	Bitlis	0.27	0.33	0.69	0.95	1.54	2.36	1.72	2.90	0.47	0.47	0.30	0.00
	Elazig	0.75	0.59	1.08	0.96	0.97	1.11	1.08	1.06	1.15	0.97	1.07	1.20
	Erzincan	1.21	0.92	1.49	1.12	1.01	1.27	0.94	1.32	0.91	0.60	0.66	0.55
	Erzurum	0.93	0.78	1.00	0.84	1.08	1.10	1.12	1.14	1.13	1.08	0.96	0.83
	Hakkari	1.18	0.57	0.83	0.73	1.03	0.93	0.77	1.22	1.03	1.37	1.04	1.30
	Kars	0.51	0.34	0.91	0.79	0.24	0.87	1.79	1.98	1.10	1.20	1.68	0.58
	Malatya	0.87	0.75	0.95	1.04	1.02	1.14	1.21	0.96	1.18	1.08	0.90	0.88
	Tunceli	0.83	0.92	0.87	0.88	1.14	1.12	1.43	0.81	1.24	0.95	1.02	0.79
	Van	1.06	0.76	0.87	0.89	1.05	0.96	0.88	1.02	1.28	1.08	1.12	1.04
	Igdir	1.29	0.81	1.15	0.94	1.01	1.11	0.68	0.87	0.90	1.16	1.07	0.99
Marmara	Balikesir	0.62	0.53	0.81	1.04	1.10	1.03	1.52	1.80	1.30	0.93	0.65	0.67
	Bilecik	1.69	0.66	1.05	0.84	1.03	0.94	0.69	0.74	0.99	1.14	1.12	1.12
	Bursa	0.99	0.76	0.98	0.93	1.04	0.88	1.22	1.43	1.18	1.05	0.75	0.79
	Canakkale	0.67	0.68	1.05	1.16	1.27	1.08	1.15	1.16	1.22	1.16	0.73	0.68
	Edirne	0.73	0.76	1.00	0.84	0.89	1.01	1.28	1.53	1.06	0.97	1.12	0.81
	Istanbul	0.83	0.79	1.03	1.04	1.00	0.98	1.02	1.18	1.18	1.09	0.97	0.89
	Kirklareli	0.99	1.04	1.29	1.06	0.92	0.68	0.89	0.96	1.04	1.14	0.79	1.20
	Kocaeli	0.90	0.83	1.10	1.09	1.06	0.92	0.92	1.03	1.06	1.02	1.03	1.05
	Sakarya	0.97	0.85	0.99	1.00	1.09	0.95	0.99	1.03	1.02	1.15	0.94	1.01
	Tekirdag	0.60	0.48	0.87	0.93	0.82	1.18	2.02	2.19	1.09	0.63	0.63	0.56
	Yalova	0.47	0.43	0.41	0.44	0.62	0.58	1.33	1.85	1.48	1.63	1.43	1.31
Mediterran	Adana	0.91	0.87	0.94	1.03	1.02	0.99	1.07	0.96	1.07	1.09	1.08	0.98
	Antalya	0.28	0.31	0.58	0.98	1.31	1.31	1.76	1.91	1.57	1.32	0.37	0.30
	Burdur	0.79	0.58	1.13	1.07	1.06	1.04	1.05	1.35	1.07	1.07	0.93	0.86
	Hatay	0.77	0.60	0.94	1.09	0.99	0.89	1.29	1.36	1.12	1.00	1.01	0.94
	Isparta	0.80	0.57	0.72	0.88	1.11	1.32	0.98	1.06	1.26	1.01	1.16	1.13
	Icel	0.80	0.56	0.82	0.94	1.08	1.07	1.27	1.54	1.16	1.14	0.81	0.80
	Kah. Maras	1.14	0.75	1.04	1.06	1.14	1.12	0.78	0.99	1.08	0.98	1.00	0.91
SE.Anatoli	Adiyaman	0.72	0.68	0.70	0.81	1.37	1.19	1.32	1.11	1.39	1.17	0.62	0.93
	Diyarbakir	0.99	0.75	0.96	0.99	1.03	1.01	1.00	1.03	1.11	0.99	1.11	1.02
	Gaziantep	1.11	0.83	0.99	1.06	1.04	1.00	0.90	0.98	1.00	1.01	1.07	1.01
	Mardin	1.34	0.76	0.83	1.09	1.16	1.07	0.67	0.72	1.17	1.04	1.05	1.09
	Siirt	1.10	0.71	1.03	0.90	0.76	0.92	0.88	0.90	1.07	1.32	1.39	1.02
	Sanli Urfa	0.90	0.54	0.90	1.14	1.14	0.86	0.99	1.32	1.31	0.87	0.92	1.13
	Batman	1.10	0.89	1.14	0.88	1.13	1.18	1.00	0.92	1.03	1.10	0.96	0.67
	Sirnak	1.46	0.98	0.95	0.89	0.49	0.95	0.30	0.74	0.76	0.94	1.47	2.07
TURKEY TOTAL		0.67	0.59	0.84	1.02	1.14	1.12	1.29	1.45	1.31	1.12	0.75	0.69

Appendix 89. The seasonal indices for no of foreign nights spent by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	1.67	0.41	0.87	1.19	1.18	0.91	1.65	1.24	1.42	0.98	0.26	0.23
	Aydin	0.07	0.04	0.11	0.68	1.56	1.79	2.22	2.44	1.81	1.22	0.04	0.02
	Denizli	0.26	0.36	0.71	1.20	1.30	1.24	1.62	1.92	1.72	0.97	0.48	0.22
	Izmir	0.20	0.20	0.34	0.83	1.34	1.59	1.83	2.08	1.80	1.29	0.26	0.24
	Kutahya	0.84	0.86	0.55	1.09	1.68	0.93	0.84	0.68	1.73	1.24	1.25	0.31
	Manisa	1.12	0.80	0.95	1.15	0.81	0.83	0.91	1.15	1.19	1.14	0.87	1.08
	Mugla	0.11	0.14	0.25	1.02	1.59	1.77	1.93	2.04	1.86	1.20	0.08	0.02
	Usak	0.80	0.96	1.12	0.89	1.05	0.84	2.80	0.89	0.97	0.63	0.59	0.45
Black Sea	Amasya	0.08	0.07	0.13	2.78	1.43	1.17	1.30	1.53	2.14	1.00	0.13	0.23
	Artvin	0.88	0.60	1.04	0.98	1.00	0.82	1.17	0.98	1.12	1.21	1.22	0.97
	Bolu	0.24	0.16	0.20	1.18	1.69	1.41	1.51	2.26	2.00	1.03	0.13	0.19
	Corum	0.16	0.31	0.15	1.50	2.15	0.95	1.53	1.35	1.39	1.80	0.57	0.14
	Giresun	0.53	0.46	0.95	1.40	0.95	1.46	1.57	1.63	1.39	0.83	0.46	0.38
	Gumushane	0.00	0.00	0.00	0.44	1.44	4.28	1.99	1.83	1.93	0.09	0.00	0.00
	Kastamonu	0.40	0.21	0.21	0.56	1.10	1.53	1.00	1.57	1.74	1.04	2.03	0.61
	Ordu	0.47	0.54	0.85	0.80	1.10	1.17	1.96	2.76	0.89	0.66	0.54	0.26
	Rize	0.88	0.58	1.17	1.23	0.96	1.18	2.11	0.59	0.73	1.09	0.51	0.98
	Samsun	0.90	0.59	0.52	0.76	0.86	1.09	1.38	1.38	1.39	1.26	0.66	1.22
	Sinop	0.76	0.38	1.00	0.83	0.95	1.02	1.12	1.13	1.05	0.83	1.34	1.60
	Tokat	0.88	0.23	2.17	0.79	1.22	1.24	0.74	0.81	1.14	1.15	0.67	0.95
	Trabzon	0.74	0.63	0.71	0.95	0.83	1.14	1.08	1.71	1.06	1.08	1.05	1.04
	Zonguldak	0.62	0.33	0.23	0.66	0.23	0.27	1.54	2.89	1.47	3.12	0.52	0.11
	Bartin	0.17	0.28	0.48	1.53	0.84	3.03	0.43	2.70	0.76	1.03	0.76	0.00
	Karabuk	0.17	0.79	0.76	0.85	0.88	1.54	2.06	2.13	1.72	0.49	0.31	0.30
C.Anatolia	Ankara	0.64	0.67	0.94	1.09	1.19	1.04	0.97	1.25	1.38	1.16	0.93	0.74
	Cankiri	0.00	0.61	4.45	1.43	2.95	0.00	0.69	0.25	0.28	0.49	0.56	0.29
	Eskisehir	0.69	0.42	0.84	1.64	1.25	0.94	0.83	0.77	1.01	2.39	0.56	0.66
	Kayseri	0.79	0.95	0.76	0.98	1.42	0.80	1.13	1.13	1.21	1.14	0.91	0.78
	Kirsehir	0.81	1.91	0.26	0.09	0.21	0.21	1.28	0.81	0.87	0.96	4.05	0.54
	Konya	0.67	0.42	0.82	1.32	1.49	1.08	1.45	1.21	1.35	1.25	0.51	0.42
	Nevsehir	0.23	0.28	0.48	1.11	1.58	1.29	1.15	1.50	1.76	1.29	0.78	0.55
	Nigde	-	-	-	-	-	-	-	-	-	-	-	-
	Sivas	0.11	0.24	0.22	0.19	1.26	0.22	1.81	2.91	1.38	2.36	1.09	0.21
	Yozgat	0.36	0.29	0.63	2.20	1.30	1.48	1.55	0.75	0.67	0.97	1.15	0.64
	Aksaray	0.08	0.09	0.17	1.49	1.81	1.12	1.50	2.48	2.43	0.45	0.19	0.19
	Karaman	2.78	2.32	0.27	1.49	0.42	0.65	0.93	0.91	0.47	0.67	0.36	0.73
	Kirikkale	0.11	0.18	4.14	0.03	3.68	0.06	1.14	0.90	0.68	0.64	0.24	0.18
E.Anatolia	Agri	0.69	0.41	0.65	0.63	0.85	1.30	1.64	1.62	1.56	1.50	0.70	0.45
	Bingol	0.39	0.28	3.93	0.75	0.49	0.68	1.53	1.47	1.02	0.97	0.48	0.00
	Bitlis	-	-	-	-	-	-	-	-	-	-	-	-
	Elazig	0.94	1.41	1.46	0.19	1.09	0.54	0.10	2.52	0.39	2.67	0.69	0.00
	Erzincan	0.45	1.79	2.82	1.10	0.81	1.81	0.22	1.25	0.37	0.96	0.40	0.01
	Erzurum	1.22	1.32	1.94	0.64	0.96	1.26	1.58	1.06	0.91	0.58	0.22	0.32
	Hakkari	1.25	1.88	1.12	0.00	0.00	0.00	0.00	0.88	3.81	0.71	0.71	1.64
	Kars	0.48	0.03	0.30	0.30	1.52	2.83	0.99	1.66	3.14	0.47	0.17	0.10
	Malatya	1.56	1.37	0.81	0.77	1.05	1.19	0.68	0.80	1.01	0.68	1.31	0.77
	Tunceli	-	-	-	-	-	-	-	-	-	-	-	-
	Van	0.72	0.53	0.60	0.91	1.30	1.01	1.09	1.67	1.42	1.19	0.83	0.72
	Igdir	1.46	0.86	1.28	1.11	1.09	1.03	0.75	0.89	0.71	0.97	1.00	0.85
Marmara	Balikesir	0.05	0.07	0.16	0.62	1.09	1.63	2.50	3.18	1.77	0.82	0.06	0.04
	Bilecik	0.94	0.71	0.85	0.65	0.91	1.46	1.56	0.75	0.76	1.09	1.30	1.02
	Bursa	0.34	0.41	0.64	0.94	1.25	0.92	1.75	2.30	1.44	1.05	0.54	0.42
	Canakkale	0.53	0.53	0.84	1.30	1.63	1.17	1.05	1.09	1.48	1.25	0.60	0.53
	Edirne	0.40	0.35	0.90	0.64	0.88	0.73	1.72	2.91	1.04	1.06	0.69	0.67
	Istanbul	0.77	0.87	1.08	1.04	0.99	0.93	1.03	1.28	1.14	1.11	0.94	0.83
	Kirklareli	1.03	1.60	1.12	1.01	1.01	0.52	0.81	0.91	1.76	1.00	0.98	0.25
	Kocaeli	0.86	0.81	1.10	0.65	1.00	0.99	0.90	1.07	1.15	1.29	1.36	0.83
	Sakarya	0.47	0.68	0.87	0.98	0.79	0.60	1.39	1.41	1.40	1.31	1.30	0.80
	Tekirdag	0.32	1.83	0.80	0.86	0.87	1.34	1.80	1.36	0.90	0.83	0.57	0.49
	Yalova	0.19	0.21	0.34	0.36	0.34	0.33	3.32	4.24	1.43	0.66	0.31	0.27
Mediterran	Adana	0.92	0.88	0.88	0.95	1.27	0.97	0.96	0.94	0.98	0.91	1.36	0.97
	Antalya	0.19	0.23	0.48	0.91	1.29	1.44	1.68	1.99	1.71	1.52	0.35	0.21
	Burdur	0.43	0.24	0.32	0.96	0.76	1.49	2.27	2.49	1.33	1.29	0.36	0.07
	Hatay	0.92	0.37	0.55	1.12	1.06	0.75	1.53	1.90	1.24	1.10	0.77	0.68
	Isparta	0.16	0.58	0.43	1.33	1.70	1.23	0.91	1.26	1.72	1.77	0.52	0.39
	Icel	0.66	0.40	0.73	0.93	1.03	1.10	1.30	2.02	1.58	1.19	0.53	0.52
	Kah. Maras	0.92	0.41	0.71	1.10	1.47	1.61	1.42	1.26	1.36	0.57	0.83	0.33
SE.Anatoli	Adiyaman	0.08	0.04	0.18	0.29	1.13	1.42	3.29	2.44	1.93	0.83	0.28	0.08
	Diyarbakir	0.54	0.44	1.24	0.82	0.83	0.96	1.11	1.52	1.37	1.35	1.14	0.69
	Gaziantep	1.04	0.73	0.96	0.78	0.94	0.96	0.91	1.06	1.53	0.93	1.33	0.84
	Mardin	1.46	0.51	1.61	1.44	0.37	0.71	0.75	0.28	0.83	1.11	2.17	0.78
	Siirt	0.19	0.20	5.12	0.00	0.29	1.13	0.37	1.32	1.61	0.64	1.12	0.00
	Sanli Urfa	0.09	0.17	0.27	0.72	2.27	1.61	1.02	1.78	1.64	1.48	0.46	0.50
	Batman	0.82	1.29	3.65	0.00	1.16	0.00	0.12	0.00	1.25	1.96	0.84	0.90
	Sirnak	0.89	0.85	2.46	0.50	0.71	0.72	0.53	0.61	0.82	1.38	1.65	0.88
TURKEY TOTAL		0.31	0.34	0.55	0.94	1.29	1.38	1.61	1.88	1.61	1.32	0.44	0.33

Appendix 90. The seasonal indices for no of Turkish nights spent by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	0.97	0.56	0.99	0.80	0.87	0.74	1.48	1.67	1.10	0.97	0.95	0.90
	Aydin	0.59	0.53	0.74	1.02	1.20	1.15	1.64	1.96	1.15	1.01	0.34	0.67
	Denizli	1.21	1.00	1.24	1.08	0.95	0.96	1.05	1.01	0.88	0.98	0.71	0.95
	Izmir	0.75	0.71	0.81	1.02	1.03	1.00	1.42	1.55	1.21	0.95	0.77	0.77
	Kutahya	0.58	0.50	0.66	0.89	1.12	1.04	1.59	1.77	1.29	1.00	0.89	0.67
	Manisa	0.92	0.73	1.08	1.22	0.90	1.01	1.09	1.00	1.14	0.94	0.98	0.98
	Mugla	0.22	0.31	0.30	1.05	1.34	1.25	2.17	2.71	1.57	0.66	0.22	0.20
	Usak	0.93	0.84	1.04	0.92	0.94	1.02	0.89	1.06	1.12	1.14	1.12	0.97
Black Sea	Amasya	0.75	0.69	1.22	1.05	0.87	0.81	1.17	1.17	1.22	1.04	1.05	0.95
	Artvin	0.92	0.54	0.96	0.95	1.03	1.10	0.95	0.94	1.18	1.22	1.19	1.03
	Bolu	1.22	1.06	1.17	0.90	0.76	0.77	1.10	1.10	0.82	0.93	0.86	1.30
	Corum	0.92	0.65	0.95	0.93	1.08	1.03	0.99	1.07	1.05	1.20	1.13	0.98
	Giresun	0.86	0.72	0.98	0.98	1.09	1.11	1.27	1.32	0.98	0.97	0.94	0.78
	Gumushane	0.37	0.43	0.37	1.67	0.55	0.58	0.56	2.22	1.97	1.42	1.21	0.63
	Kastamonu	0.93	0.71	0.87	1.05	1.04	0.83	1.00	1.15	1.05	1.20	1.10	1.06
	Ordu	0.86	0.66	0.86	0.85	1.20	1.06	1.50	1.51	1.07	0.81	0.79	0.81
	Rize	0.75	0.79	0.88	0.96	1.23	1.15	2.08	1.06	0.73	0.81	0.74	0.81
	Samsun	0.92	0.81	0.85	0.83	0.82	1.11	1.26	1.44	1.29	0.87	0.86	0.95
	Sinop	0.96	0.58	0.94	0.81	0.91	0.93	1.55	1.40	0.94	0.92	1.02	1.04
	Tokat	1.01	0.69	0.94	0.97	0.93	1.12	0.92	1.08	1.19	1.11	1.17	0.86
	Trabzon	0.71	0.59	0.78	1.00	1.24	1.28	1.23	1.40	1.16	0.95	0.95	0.71
	Zonguldak	0.91	0.69	1.08	1.00	0.98	1.12	0.87	0.97	1.06	1.31	1.06	0.96
	Bartin	0.83	0.82	0.59	0.86	1.28	1.05	1.34	1.70	0.98	0.82	0.81	0.95
	Karabuk	0.82	0.96	0.82	0.88	0.89	0.75	1.01	1.89	1.96	0.85	0.62	0.55
C.Anatolia	Ankara	0.99	0.72	1.05	1.04	1.00	1.03	0.90	0.90	1.15	1.10	1.14	0.99
	Cankiri	0.98	0.79	0.89	1.00	0.96	0.42	0.65	2.03	1.07	1.18	0.90	1.13
	Eskisehir	0.88	0.67	1.08	0.98	0.97	1.10	0.98	1.21	1.03	1.04	1.08	0.99
	Kayseri	0.96	0.91	1.29	1.02	1.00	1.00	0.83	0.96	1.00	1.15	0.99	0.88
	Kirsehir	0.42	0.98	1.00	0.75	1.36	0.72	1.59	1.45	1.07	1.49	0.53	0.63
	Konya	0.94	0.63	0.91	0.97	1.17	1.07	1.09	1.04	1.09	1.12	0.93	1.04
	Nevsehir	0.63	0.68	1.19	1.15	1.55	1.17	0.99	0.89	1.00	1.14	0.77	0.81
	Nigde	1.46	0.64	1.03	0.74	1.54	2.32	1.25	0.88	0.72	0.97	0.23	0.23
	Sivas	0.86	0.76	1.05	0.96	1.13	0.96	0.97	0.97	1.21	1.23	1.08	0.82
	Yozgat	0.74	0.51	0.64	0.76	0.68	2.89	0.94	1.06	1.08	0.99	0.92	0.79
	Aksaray	0.84	0.59	0.91	1.34	1.04	0.99	0.95	1.30	1.52	0.76	0.87	0.90
	Karaman	0.86	0.63	0.91	1.01	1.17	1.21	0.99	0.92	0.89	1.22	1.21	0.97
	Kirikkale	0.39	0.23	0.37	0.59	0.64	1.55	1.51	0.72	1.73	1.29	1.82	1.16
E.Anatolia	Agri	1.16	1.06	0.96	0.96	0.91	0.94	1.05	1.57	0.91	0.94	0.91	0.64
	Bingol	0.85	0.77	0.91	0.86	1.07	1.04	1.14	1.12	1.36	1.10	0.90	0.88
	Bitlis	0.25	0.30	0.58	0.75	1.31	2.01	1.33	3.47	0.44	1.28	0.28	0.00
	Elazig	0.70	0.63	1.12	1.02	0.92	1.08	1.18	1.06	1.10	0.93	1.05	1.20
	Erzincan	1.12	0.97	1.71	0.80	1.27	1.65	0.69	1.31	0.84	0.63	0.51	0.48
	Erzurum	1.05	0.96	1.05	1.07	1.02	1.04	0.97	0.99	1.05	1.07	0.88	0.85
	Hakkari	1.13	0.81	0.93	0.99	1.15	0.85	0.88	1.08	0.89	1.12	0.93	1.23
	Kars	0.36	0.78	1.56	1.18	1.05	0.68	1.14	1.28	0.88	1.41	1.21	0.48
	Malatya	0.89	0.67	0.93	1.05	1.06	1.11	1.20	0.90	1.31	1.23	0.78	0.88
	Tunceli	0.84	0.73	0.81	0.75	1.05	1.07	1.47	1.04	1.26	1.14	0.90	0.93
	Van	0.96	0.78	0.94	0.87	1.02	1.04	0.93	1.10	1.19	1.06	1.11	1.01
	Igdir	1.02	0.69	0.91	0.96	0.80	1.11	1.01	1.21	1.01	1.24	0.98	1.06
Marmara	Balikesir	0.58	0.51	0.73	0.81	1.12	0.98	1.83	2.04	1.22	0.87	0.67	0.66
	Bilecik	1.12	0.96	1.04	0.79	0.83	0.95	0.95	0.79	1.12	1.04	1.10	1.31
	Bursa	1.37	1.11	1.16	0.81	0.79	0.80	0.86	0.85	0.85	0.99	1.09	1.33
	Canakkale	0.81	0.72	1.12	0.99	1.05	1.08	1.32	1.45	1.01	0.96	0.76	0.72
	Edirne	0.87	0.77	0.94	1.01	0.94	1.00	1.24	1.29	0.96	0.96	1.00	1.01
	Istanbul	1.02	0.80	1.02	1.00	0.98	0.98	1.02	1.10	1.04	1.03	1.03	0.99
	Kirklareli	0.73	0.81	1.28	1.22	1.04	0.52	1.02	1.19	1.18	1.15	0.91	0.94
	Kocaeli	1.01	0.80	1.05	1.00	1.03	0.93	0.92	1.07	1.14	0.96	1.02	1.07
	Sakarya	1.26	0.76	1.11	1.05	1.15	0.88	0.91	1.01	0.87	0.98	0.93	1.09
	Tekirdag	0.59	0.44	0.70	0.75	0.89	1.31	1.92	2.27	1.15	0.70	0.67	0.59
	Yalova	0.50	0.53	0.53	0.55	0.70	0.55	1.17	1.36	1.43	1.65	1.49	1.53
Mediterran	Adana	0.97	0.79	1.00	1.03	1.19	0.98	1.03	1.00	1.01	1.05	0.97	0.98
	Antalya	0.37	0.37	0.45	0.82	1.42	1.24	1.90	2.27	1.62	0.90	0.31	0.35
	Burdur	0.83	0.56	1.05	1.05	1.00	1.06	1.17	1.25	1.06	1.06	0.96	0.94
	Hatay	0.82	0.66	1.04	1.07	0.94	0.91	1.05	1.13	1.08	1.03	1.14	1.14
	Isparta	0.87	0.81	0.90	0.87	1.00	1.25	0.98	0.93	1.13	0.99	1.15	1.11
	Icel	0.79	0.59	0.86	1.04	1.11	1.01	1.31	1.62	1.05	1.00	0.81	0.82
	Kah. Maras	1.10	0.81	1.15	1.11	0.99	1.06	0.82	1.00	1.03	0.99	1.02	0.92
SE.Anatoli	Adiyaman	0.78	0.74	0.80	0.91	1.11	0.97	0.95	0.99	1.30	1.23	1.00	1.21
	Diyarbakir	0.93	0.74	1.02	1.03	1.00	1.00	0.92	0.94	1.20	1.10	1.11	0.99
	Gaziantep	1.08	0.85	1.05	1.11	1.10	0.97	0.94	0.96	0.93	1.07	1.07	0.87
	Mardin	1.32	0.67	0.73	1.06	0.90	0.91	0.75	0.76	1.04	1.25	1.33	1.28
	Siirt	0.92	0.82	0.91	0.98	0.91	1.03	0.99	0.88	1.05	1.28	1.35	0.88
	Sanli Urfa	0.75	0.47	0.83	0.97	1.00	1.07	0.82	1.53	1.08	1.14	1.39	0.96
	Batman	1.10	0.95	1.09	1.17	1.08	1.13	0.96	0.88	0.99	1.05	0.91	0.67
	Sirnak	1.39	0.92	0.86	0.86	0.75	0.90	0.69	0.69	0.70	0.84	1.41	1.99
TURKEY TOTAL		0.79	0.66	0.85	0.96	1.10	1.06	1.33	1.50	1.20	0.98	0.78	0.79

Appendix 91. The seasonal indices for no of overall nights spent by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	1.00	0.55	0.99	0.81	0.88	0.74	1.48	1.66	1.10	0.97	0.93	0.88
	Aydin	0.16	0.12	0.22	0.74	1.50	1.68	2.12	2.36	1.69	1.18	0.09	0.14
	Denizli	0.64	0.61	0.91	1.16	1.17	1.13	1.38	1.54	1.37	0.97	0.59	0.52
	Izmir	0.44	0.43	0.54	0.91	1.21	1.33	1.65	1.84	1.53	1.14	0.50	0.48
	Kutahya	0.60	0.53	0.65	0.91	1.16	1.04	1.53	1.67	1.33	1.02	0.92	0.64
	Manisa	0.94	0.74	1.07	1.21	0.89	0.99	1.07	1.02	1.15	0.97	0.97	0.99
	Mugla	0.13	0.17	0.26	1.02	1.54	1.68	1.97	2.17	1.80	1.09	0.11	0.06
	Usak	0.92	0.85	1.05	0.91	0.95	1.00	1.08	1.04	1.10	1.09	1.07	0.92
Black Sea	Amasya	0.70	0.65	1.15	1.16	0.91	0.83	1.19	1.20	1.30	1.04	0.98	0.89
	Artvin	0.91	0.56	0.99	0.95	1.02	1.00	1.02	0.96	1.15	1.21	1.20	1.02
	Bolu	1.07	0.92	1.02	0.95	0.90	0.87	1.17	1.29	1.00	0.94	0.75	1.13
	Corum	0.89	0.63	0.92	0.96	1.12	1.02	1.02	1.09	1.07	1.22	1.11	0.94
	Giresun	0.84	0.70	0.98	1.00	1.08	1.12	1.29	1.34	1.01	0.96	0.91	0.76
	Gumushane	0.35	0.40	0.36	1.60	0.70	0.76	0.78	2.17	2.00	1.26	1.08	0.54
	Kastamonu	0.92	0.70	0.86	1.04	1.04	0.83	1.00	1.17	1.07	1.20	1.11	1.05
	Ordu	0.83	0.65	0.86	0.85	1.19	1.08	1.54	1.62	1.05	0.80	0.77	0.76
	Rize	0.78	0.76	0.97	1.03	1.17	1.16	2.09	0.93	0.72	0.85	0.69	0.85
	Samsun	0.92	0.80	0.83	0.82	0.82	1.11	1.27	1.43	1.29	0.89	0.85	0.96
	Sinop	0.94	0.56	0.95	0.81	0.91	0.94	1.50	1.37	0.96	0.91	1.06	1.11
	Tokat	1.01	0.67	1.00	0.97	0.94	1.12	0.91	1.07	1.19	1.11	1.14	0.86
	Trabzon	0.73	0.60	0.76	0.98	1.14	1.24	1.20	1.47	1.14	0.98	0.97	0.78
	Zonguldak	0.90	0.69	1.07	0.99	0.98	1.12	0.88	1.00	1.06	1.30	1.05	0.95
	Bartin	0.79	0.79	0.58	0.88	1.25	1.14	1.29	1.78	0.97	0.84	0.79	0.90
	Karabuk	0.77	0.94	0.82	0.88	0.89	0.83	1.06	1.90	1.96	0.82	0.60	0.53
C.Anatolia	Ankara	0.89	0.70	1.02	1.05	1.06	1.03	0.92	1.00	1.22	1.12	1.08	0.92
	Cankiri	0.97	0.78	0.90	1.01	0.97	0.42	0.66	2.01	1.06	1.18	0.90	1.13
	Eskisehir	0.85	0.64	1.04	1.04	0.98	1.08	0.97	1.17	1.04	1.22	1.03	0.96
	Kayseri	0.94	0.91	1.25	1.01	1.04	0.99	0.86	0.98	1.03	1.14	0.98	0.87
	Kirsehir	0.43	0.99	0.99	0.74	1.35	0.72	1.59	1.45	1.07	1.48	0.55	0.63
	Konya	0.87	0.57	0.89	1.06	1.26	1.07	1.18	1.09	1.16	1.15	0.82	0.87
	Nevsehir	0.38	0.42	0.73	1.12	1.56	1.26	1.10	1.29	1.49	1.24	0.78	0.65
	Nigde	1.42	0.63	1.02	0.73	1.53	2.29	1.24	0.94	0.78	0.96	0.22	0.22
	Sivas	0.84	0.75	1.03	0.94	1.13	0.93	0.99	1.02	1.21	1.26	1.08	0.81
	Yozgat	0.73	0.50	0.64	0.84	0.69	2.84	0.97	1.04	1.06	0.99	0.92	0.78
	Aksaray	0.56	0.41	0.64	1.39	1.32	1.04	1.16	1.72	1.84	0.65	0.63	0.64
	Karaman	0.94	0.70	0.88	1.03	1.14	1.19	0.99	0.92	0.87	1.19	1.17	0.96
	Kirikkale	0.39	0.24	0.74	0.56	0.67	1.47	1.45	0.72	1.66	1.26	1.72	1.11
E.Anatolia	Agri	0.97	0.81	0.83	0.82	0.88	1.09	1.28	1.58	1.18	1.15	0.85	0.57
	Bingol	0.85	0.76	0.94	0.86	1.07	1.03	1.14	1.13	1.36	1.10	0.90	0.87
	Bitlis	0.25	0.30	0.58	0.74	1.33	1.99	1.35	3.47	0.44	1.27	0.28	0.00
	Elazig	0.73	0.67	1.11	0.98	0.93	1.06	1.15	1.06	1.08	1.04	1.03	1.15
	Erzincan	1.09	1.00	1.76	0.82	1.25	1.65	0.67	1.31	0.82	0.65	0.51	0.46
	Erzurum	1.12	1.06	1.24	1.00	0.98	1.01	1.01	0.99	1.02	0.99	0.80	0.78
	Hakkari	1.13	0.82	0.93	0.98	1.15	0.85	0.87	1.08	0.92	1.11	0.92	1.24
	Kars	0.37	0.75	1.51	1.14	1.06	0.77	1.14	1.29	0.97	1.37	1.17	0.47
	Malatya	0.91	0.69	0.92	1.04	1.06	1.11	1.19	0.90	1.30	1.22	0.79	0.87
	Tunceli	0.84	0.73	0.83	0.75	1.04	1.07	1.46	1.04	1.26	1.14	0.90	0.93
	Van	0.93	0.76	0.90	0.88	1.05	1.03	0.94	1.16	1.22	1.07	1.08	0.98
	Igdir	1.30	0.79	1.14	1.07	0.98	1.06	0.84	1.01	0.83	1.07	0.99	0.92
Marmara	Balikesir	0.41	0.37	0.54	0.75	1.11	1.18	2.04	2.41	1.39	0.86	0.47	0.46
	Bilecik	1.09	0.92	1.01	0.77	0.85	1.03	1.05	0.78	1.06	1.05	1.13	1.26
	Bursa	1.02	0.86	0.98	0.86	0.96	0.85	1.16	1.34	1.05	1.01	0.90	1.02
	Canakkale	0.69	0.63	1.00	1.13	1.31	1.12	1.21	1.30	1.20	1.08	0.69	0.64
	Edirne	0.81	0.72	0.96	0.97	0.94	0.97	1.30	1.47	0.97	0.97	0.96	0.96
	Istanbul	0.84	0.85	1.06	1.03	0.99	0.94	1.03	1.23	1.11	1.08	0.97	0.88
	Kirklareli	0.89	0.80	1.30	1.22	1.09	0.53	0.93	1.08	1.35	1.17	0.96	0.70
	Kocaeli	0.99	0.79	1.05	0.93	1.03	0.95	0.92	1.07	1.14	1.02	1.09	1.02
	Sakarya	1.10	0.74	1.07	1.03	1.09	0.83	1.03	1.11	0.98	1.05	0.96	1.01
	Tekirdag	0.57	0.60	0.70	0.76	0.89	1.32	1.89	2.17	1.13	0.72	0.67	0.58
	Yalova	0.45	0.48	0.50	0.52	0.64	0.51	1.53	1.85	1.43	1.49	1.28	1.30
Mediterran	Adana	0.95	0.80	0.98	1.01	1.21	0.97	1.02	0.99	1.00	1.02	1.07	0.99
	Antalya	0.22	0.25	0.47	0.89	1.31	1.41	1.72	2.04	1.69	1.41	0.34	0.24
	Burdur	0.82	0.55	1.02	1.05	0.99	1.07	1.20	1.29	1.06	1.07	0.95	0.92
	Hatay	0.84	0.59	0.91	1.08	0.97	0.87	1.17	1.34	1.13	1.05	1.03	1.01
	Isparta	0.78	0.79	0.83	0.92	1.08	1.24	0.97	0.98	1.22	1.12	1.06	1.02
	Icel	0.75	0.54	0.83	1.01	1.09	1.04	1.31	1.71	1.18	1.05	0.75	0.75
	Kah. Maras	1.08	0.77	1.11	1.10	1.05	1.13	0.86	1.01	1.05	0.96	1.01	0.87
SE.Anatoli	Adiyaman	0.67	0.63	0.69	0.80	1.12	1.06	1.27	1.22	1.50	1.18	0.87	1.01
	Diyarbakir	0.91	0.72	1.03	1.02	0.99	1.00	0.93	0.97	1.21	1.11	1.12	0.98
	Gaziantep	1.08	0.83	1.04	1.06	1.07	0.97	0.94	0.97	1.01	1.05	1.10	0.87
	Mardin	1.32	0.67	0.76	1.08	0.88	0.90	0.75	0.75	1.04	1.24	1.35	1.26
	Siirt	0.92	0.82	0.92	0.98	0.91	1.03	0.99	0.88	1.05	1.28	1.35	0.88
	Sanli Urfa	0.70	0.44	0.79	0.95	1.09	1.11	0.83	1.55	1.12	1.17	1.32	0.93
	Batman	1.10	0.95	1.10	1.17	1.08	1.13	0.96	0.88	0.99	1.05	0.91	0.67
	Sirnak	1.37	0.92	0.90	0.86	0.75	0.90	0.69	0.69	0.70	0.87	1.40	1.96
TURKEY TOTAL		0.47	0.45	0.65	0.95	1.23	1.28	1.51	1.74	1.46	1.20	0.56	0.49

Appendix 92. The seasonal indices for average foreign length of stay by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	2.97	1.16	0.93	0.95	0.89	0.69	0.79	0.70	0.67	0.76	0.70	0.78
	Aydin	0.64	0.41	0.50	0.92	1.35	1.37	1.59	1.47	1.46	1.44	0.44	0.40
	Denizli	0.93	0.91	0.94	1.02	1.02	1.00	1.00	1.08	0.97	1.03	0.96	1.14
	Izmir	0.65	0.64	0.65	0.91	1.18	1.41	1.41	1.37	1.22	1.17	0.68	0.70
	Kutahya	1.42	1.95	1.11	0.48	1.27	1.10	0.94	0.64	1.65	0.36	0.59	0.49
	Manisa	1.22	0.82	1.03	0.82	0.91	0.73	0.85	1.03	0.98	1.01	1.40	1.22
	Mugla	0.80	1.17	1.06	1.03	1.08	1.01	1.14	1.11	1.08	1.06	0.85	0.62
	Usak	0.86	1.22	1.08	1.14	1.31	0.97	1.26	0.74	0.91	0.65	1.01	0.85
Black Sea	Amasya	0.59	0.62	0.39	2.22	1.00	0.98	1.13	0.81	1.18	1.21	0.63	1.24
	Artvin	0.87	1.19	1.10	1.10	0.76	1.12	1.19	1.40	0.71	0.80	0.74	1.02
	Bolu	2.07	1.18	1.04	0.72	0.76	0.73	0.77	0.80	0.75	0.73	1.12	1.33
	Corum	0.71	2.78	1.26	0.95	0.68	0.71	0.89	0.66	0.68	0.99	0.96	0.75
	Giresun	0.84	0.85	1.31	1.75	1.13	0.91	0.86	0.92	0.96	1.01	0.72	0.74
	Gumushane	0.00	0.00	0.00	1.13	2.16	3.08	1.66	2.44	1.41	0.12	0.00	0.00
	Kastamonu	1.07	0.58	0.53	1.24	1.01	0.82	0.95	0.76	2.37	1.20	0.75	0.73
	Ordu	0.82	1.04	1.07	1.11	1.10	0.91	1.08	1.48	0.70	0.82	0.93	0.94
	Rize	0.89	1.06	1.01	1.07	0.91	1.01	1.26	0.89	0.75	1.14	1.08	0.93
	Samsun	1.07	0.99	0.88	0.68	0.67	1.00	0.92	0.90	0.82	0.88	1.40	1.78
	Sinop	1.41	1.48	1.43	0.61	0.36	0.82	0.69	0.54	0.76	0.84	1.25	1.82
	Tokat	1.94	1.04	0.65	0.84	0.80	1.16	0.89	0.62	0.48	0.82	2.05	0.73
	Trabzon	0.88	0.78	0.79	1.47	1.12	1.14	0.96	1.28	0.91	0.96	0.81	0.88
	Zonguldak	0.47	0.76	0.43	0.45	0.40	2.22	1.45	1.14	1.05	1.10	0.95	1.59
	Bartin	0.15	0.70	0.84	1.21	2.76	2.98	0.52	0.46	0.73	1.21	0.44	0.00
	Karabuk	0.38	0.36	0.39	0.69	1.28	1.20	0.87	1.22	1.05	2.03	1.20	1.33
C.Anatolia	Ankara	1.11	1.17	1.11	1.06	0.88	0.93	0.88	0.88	0.90	0.85	1.07	1.18
	Cankiri	0.00	0.68	4.85	1.95	1.34	0.00	0.82	0.42	0.35	0.34	0.87	0.37
	Eskisehir	1.25	0.93	1.22	1.09	0.81	0.67	0.76	0.85	0.85	1.75	0.92	0.90
	Kayseri	1.12	1.17	1.40	0.70	0.89	0.70	0.84	0.96	0.75	1.18	1.32	0.96
	Kirsehir	0.50	3.00	0.57	0.28	0.61	0.78	0.52	1.17	0.66	0.40	3.14	0.39
	Konya	1.39	0.97	0.96	0.90	0.90	0.91	1.27	1.00	0.86	0.95	0.94	0.97
	Nevsehir	0.73	0.77	0.84	0.96	1.12	1.19	1.08	1.06	1.08	1.00	1.03	1.15
	Nigde	-	-	-	-	-	-	-	-	-	-	-	-
	Sivas	0.48	0.96	1.02	0.98	1.00	1.11	0.98	1.10	1.47	0.96	0.97	0.98
	Yozgat	1.44	1.82	0.72	0.76	0.94	0.73	1.38	0.40	1.89	0.36	0.42	1.13
	Aksaray	1.02	0.89	1.22	1.13	1.04	1.02	0.90	1.03	0.98	0.90	0.90	0.97
	Karaman	2.57	2.31	0.58	1.42	0.32	0.44	0.86	1.56	0.51	0.38	0.44	0.62
	Kirikkale	0.27	0.27	3.80	0.48	2.29	0.26	1.77	1.49	0.32	0.40	0.24	0.40
E.Anatolia	Agri	0.81	0.74	1.11	1.78	1.22	0.93	0.91	0.93	0.90	0.89	0.93	0.85
	Bingol	0.61	0.60	1.98	1.19	1.20	1.21	1.01	1.19	1.19	1.22	0.61	0.00
	Bitlis	-	-	-	-	-	-	-	-	-	-	-	-
	Elazig	1.40	1.24	1.56	0.46	1.32	0.76	0.19	0.84	2.37	1.00	0.86	0.00
	Erzincan	0.94	1.30	1.43	1.06	0.66	3.74	0.61	0.80	0.60	0.37	0.33	0.15
	Erzurum	1.74	1.39	1.63	0.92	0.92	0.86	0.94	0.71	0.67	0.68	0.62	0.92
	Hakkari	0.34	1.50	1.44	0.00	0.00	0.00	0.00	0.65	5.01	1.51	0.75	0.80
	Kars	4.40	0.34	0.38	0.36	2.31	0.54	0.57	0.58	0.83	0.59	0.71	0.41
	Malatya	2.04	1.60	1.27	0.56	0.61	0.67	0.56	0.48	0.41	0.51	1.01	2.29
	Tunceli	-	-	-	-	-	-	-	-	-	-	-	-
	Van	0.77	0.94	0.85	0.83	1.11	0.81	1.00	1.15	0.95	1.14	1.27	1.18
	Igdir	0.96	0.99	0.96	1.08	0.96	0.96	1.46	1.13	0.85	0.88	0.88	0.89
Marmara	Balikesir	0.72	0.63	0.51	0.61	0.93	1.63	1.78	1.88	1.29	1.01	0.57	0.43
	Bilecik	0.99	0.97	0.93	0.95	0.92	1.22	1.04	0.96	0.94	0.71	1.39	0.98
	Bursa	1.33	1.24	0.98	0.86	0.83	0.99	0.96	0.94	0.84	0.82	1.12	1.09
	Canakkale	0.91	0.90	0.92	1.07	1.08	1.14	1.07	1.08	1.04	0.95	0.94	0.91
	Edirne	0.97	0.90	1.55	1.15	0.95	0.75	1.01	0.92	0.77	1.09	0.72	1.22
	Istanbul	1.03	1.07	1.02	0.98	0.97	0.95	0.99	1.02	0.93	1.00	0.98	1.05
	Kirklareli	1.64	0.79	1.03	0.98	1.01	0.93	0.46	0.60	1.35	1.02	1.78	0.40
	Kocaeli	1.01	1.20	1.00	0.72	0.80	1.00	0.82	0.88	1.03	1.30	1.24	1.02
	Sakarya	0.78	0.74	1.02	1.00	0.96	0.78	1.28	1.13	1.02	0.92	1.12	1.25
	Tekirdag	0.58	3.35	0.66	0.66	0.97	0.98	0.63	0.65	0.80	0.89	1.02	0.82
	Yalova	0.61	0.76	0.91	0.80	0.53	0.83	1.51	0.98	0.92	1.28	1.49	1.41
Mediterran	Adana	1.28	0.97	1.02	0.81	1.03	0.93	0.80	0.85	0.82	0.91	1.23	1.35
	Antalya	1.00	0.87	0.89	0.93	1.02	1.08	0.99	1.06	1.08	1.07	1.08	0.93
	Burdur	1.53	0.86	0.79	0.79	1.17	0.71	1.71	0.88	0.83	0.89	0.87	0.96
	Hatay	1.69	1.10	0.96	0.93	0.87	0.98	0.83	0.80	0.80	0.89	1.06	1.09
	Isparta	1.85	1.45	1.02	0.53	0.58	0.60	0.57	0.53	0.64	0.84	0.56	2.81
	Icel	0.85	1.03	1.07	0.95	0.89	0.95	0.97	1.15	1.13	0.88	1.03	1.10
	Kah. Maras	0.76	0.92	1.41	0.68	0.97	1.31	2.06	0.79	0.51	0.69	1.28	0.61
SE.Anatoli	Adiyaman	0.35	1.34	0.91	0.79	0.84	1.06	1.21	1.10	0.98	1.10	1.58	0.75
	Diyarbakir	1.44	0.87	1.03	1.10	0.78	0.83	0.67	0.87	0.85	1.04	1.06	1.45
	Gaziantep	1.19	0.89	0.94	0.75	0.89	0.98	1.00	0.86	1.26	1.12	1.10	1.01
	Mardin	1.49	2.91	1.02	0.63	0.41	0.59	0.70	0.44	0.45	0.57	2.20	0.59
	Siirt	0.67	0.67	2.57	0.00	0.49	1.07	0.71	0.85	1.67	1.63	1.66	0.00
	Sanli Urfa	0.40	0.54	0.93	2.22	2.38	1.08	0.52	0.83	0.51	1.55	0.62	0.40
	Batman	1.44	1.65	1.21	0.00	1.10	0.00	0.37	0.00	0.38	3.88	1.57	0.40
	Sirnak	0.88	0.89	0.89	0.89	1.53	0.89	1.56	0.90	0.90	0.90	0.89	0.88
TURKEY TOTAL		0.79	0.79	0.83	0.96	1.12	1.21	1.21	1.21	1.14	1.15	0.81	0.78

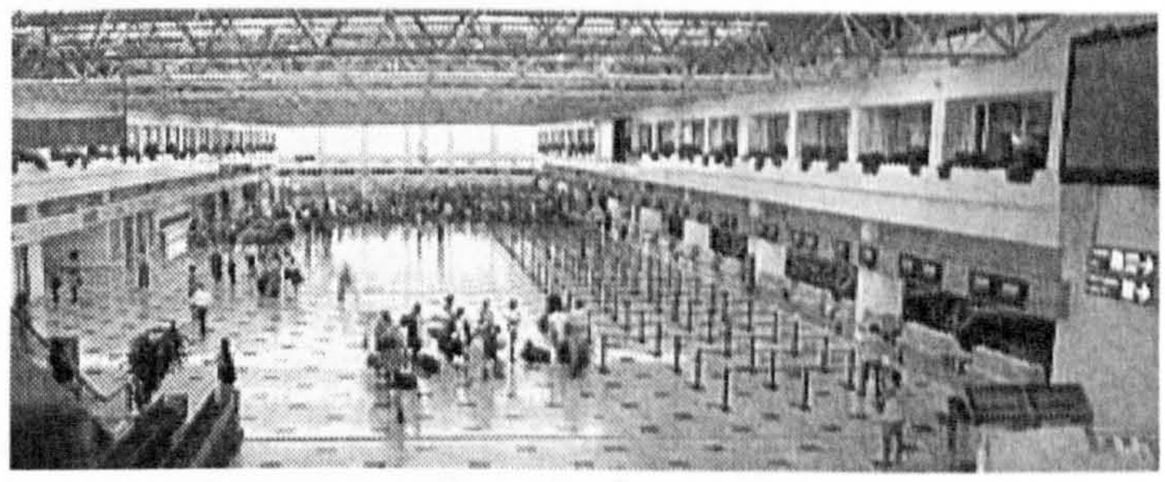
Appendix 93. The seasonal indices for average Turkish length of stay by province (1994-1996)

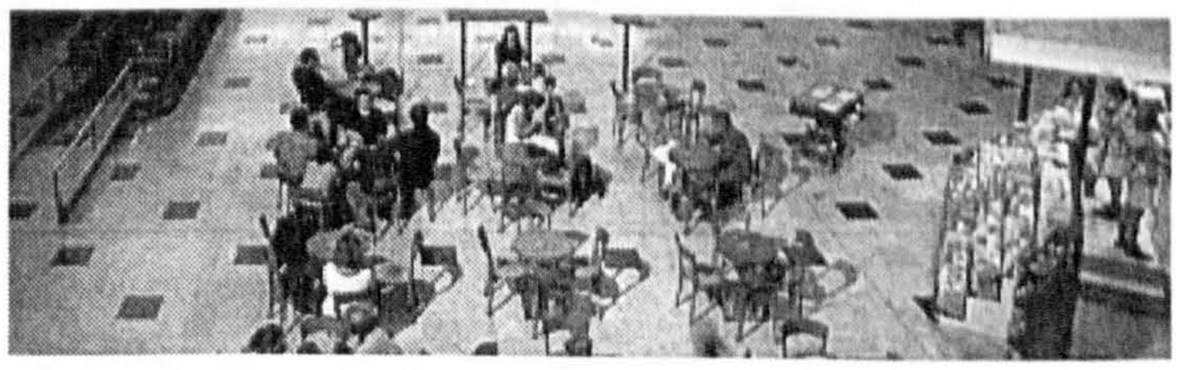
REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	0.82	0.98	0.75	1.01	1.21	1.21	0.82	0.95	1.29	1.05	0.88	1.03
	Aydin	0.78	0.85	0.74	0.97	1.20	1.25	1.40	1.39	1.12	0.90	0.65	0.76
	Denizli	0.99	1.08	1.08	1.10	0.99	1.02	0.89	0.98	0.91	1.06	1.01	0.89
	Izmir	0.89	0.97	0.84	0.95	1.00	1.03	1.19	1.24	1.08	1.02	0.92	0.88
	Kutahya	0.81	1.13	0.87	0.86	1.03	1.05	1.40	1.38	1.03	0.87	0.73	0.84
	Manisa	1.01	1.00	1.03	1.13	0.98	0.95	1.06	0.95	0.93	0.97	0.97	1.02
	Mugla	0.80	0.89	0.69	1.07	1.19	1.12	1.30	1.34	1.24	0.90	0.77	0.69
	Usak	1.02	1.10	1.06	0.95	1.13	0.91	1.03	0.91	0.98	0.93	1.00	0.98
Black Sea	Amasya	0.95	1.03	1.12	1.04	1.02	0.99	1.00	0.92	1.05	0.99	0.97	0.91
	Artvin	1.07	1.32	1.02	1.04	0.88	0.98	0.94	0.92	0.92	0.96	0.94	1.00
	Bolu	1.11	1.06	1.02	0.89	0.93	1.00	1.26	1.06	0.97	0.92	0.82	0.96
	Corum	1.01	1.01	1.03	0.93	1.04	0.99	0.89	0.92	1.00	1.02	1.13	1.03
	Giresun	1.00	1.04	0.99	0.95	0.96	1.01	0.97	0.93	0.99	1.08	1.05	1.04
	Gumushane	0.40	0.39	0.47	1.10	1.26	0.58	0.32	1.38	3.53	0.89	1.05	0.63
	Kastamonu	0.95	0.94	0.91	1.11	1.05	1.08	0.90	1.08	1.00	1.07	0.95	0.95
	Ordu	1.19	0.92	0.90	0.96	0.92	0.86	0.90	1.02	0.98	1.14	1.12	1.08
	Rize	1.13	1.10	0.99	0.90	0.93	0.97	0.90	0.97	0.81	1.13	1.03	1.13
	Samsun	0.98	0.98	0.99	0.98	0.99	1.04	0.96	1.02	1.03	1.06	1.00	0.97
	Sinop	1.05	0.99	1.09	1.00	0.99	0.97	1.07	0.98	0.95	0.92	0.99	1.02
	Tokat	1.05	1.01	1.19	0.96	1.02	1.00	1.14	0.99	0.85	0.91	0.90	0.97
	Trabzon	1.00	0.94	0.88	0.99	1.05	1.11	0.93	1.13	1.05	0.93	0.99	1.00
	Zonguldak	1.04	1.02	0.81	0.85	0.96	1.22	1.06	0.93	0.92	0.92	1.24	1.02
	Bartin	1.18	1.30	0.80	0.81	1.10	0.88	0.94	0.94	0.92	0.84	1.05	1.25
	Karabuk	0.63	0.63	0.63	0.65	0.65	0.67	1.13	1.31	1.45	1.52	1.40	1.34
C.Anatolia	Ankara	1.01	1.06	1.03	1.01	0.97	0.96	0.95	0.93	1.00	1.04	1.02	1.02
	Cankiri	1.02	1.10	1.08	0.94	1.08	0.47	0.36	2.01	0.86	1.08	0.98	1.01
	Eskisehir	1.05	0.97	1.08	0.99	1.00	0.94	0.94	1.04	0.89	1.04	1.03	1.03
	Kayseri	0.94	1.13	1.22	1.01	1.02	1.02	0.96	1.05	0.87	0.98	0.88	0.94
	Kirsehir	0.80	1.14	1.26	1.07	1.37	0.77	1.10	0.96	1.00	0.94	0.80	0.78
	Konya	1.09	1.00	0.99	0.95	0.98	1.01	1.08	0.99	1.00	0.97	0.95	0.99
	Nevsehir	0.81	0.93	1.00	0.98	1.13	1.13	1.29	0.96	0.93	1.00	0.88	0.94
	Nigde	1.27	0.83	1.31	1.10	1.34	1.39	0.89	0.70	0.89	1.23	0.55	0.51
	Sivas	1.01	1.06	1.01	0.98	1.03	0.97	0.95	0.95	0.95	0.95	0.96	1.19
	Yozgat	1.24	0.79	0.59	0.64	0.47	2.74	1.59	0.72	1.10	0.65	0.63	0.85
	Aksaray	0.92	0.98	0.97	0.97	0.93	1.07	0.90	0.93	1.46	0.86	0.89	1.12
	Karaman	1.06	0.95	1.01	0.89	1.08	1.32	1.02	1.04	0.83	0.99	1.00	0.81
	Kirikkale	0.62	0.58	0.58	1.79	0.83	0.82	1.00	2.12	0.63	0.91	1.09	1.02
E.Anatolia	Agri	0.99	0.96	0.96	1.00	1.02	1.02	0.98	1.07	1.00	1.00	1.04	0.97
	Bingol	0.86	1.15	1.05	0.94	0.88	0.92	0.96	0.89	1.22	0.92	1.11	1.10
	Bitlis	0.54	0.39	0.31	0.27	1.23	1.23	0.94	3.02	0.57	2.95	0.54	0.00
	Elazig	0.93	1.06	1.04	1.07	0.94	0.97	1.08	1.00	0.94	0.99	0.98	0.99
	Erzincan	1.57	1.61	1.63	0.96	1.59	1.51	0.42	0.59	0.54	0.64	0.45	0.49
	Erzurum	1.10	1.23	1.05	1.26	0.92	0.93	0.90	0.88	0.94	0.97	0.87	0.96
	Hakkari	0.93	1.41	1.16	1.27	1.05	0.89	1.08	0.89	0.82	0.75	0.83	0.91
	Kars	0.38	1.93	1.31	0.87	4.25	0.53	0.52	0.55	0.49	0.51	0.28	0.39
	Malatya	1.01	0.88	0.99	1.02	1.07	0.99	0.99	0.95	1.12	1.13	0.83	1.03
	Tunceli	1.00	0.79	1.00	0.86	0.92	0.99	0.99	1.29	0.98	1.18	0.85	1.15
	Van	0.90	1.01	1.07	1.00	0.97	1.13	1.06	1.11	0.93	0.96	0.95	0.92
	Igdir	1.05	0.97	1.05	1.28	0.99	0.94	0.98	1.20	0.87	0.89	0.89	0.90
Marmara	Balikesir	0.79	0.81	0.82	0.88	1.16	1.06	1.35	1.30	1.10	1.02	0.87	0.83
	Bilecik	0.74	1.55	0.90	0.85	0.75	0.95	1.39	0.96	1.03	0.91	0.89	1.07
	Bursa	1.00	1.05	0.97	0.92	0.97	0.92	0.91	0.90	0.89	1.03	1.17	1.27
	Canakkale	1.09	0.95	0.98	0.93	1.05	0.99	1.03	1.13	0.99	0.96	0.94	0.94
	Edirne	1.09	0.94	0.87	1.14	1.03	0.97	1.02	0.96	0.95	1.01	0.86	1.17
	Istanbul	1.02	1.05	1.02	0.98	1.00	0.99	1.03	1.04	0.95	0.97	1.05	0.92
	Kirklareli	0.64	0.82	0.96	1.22	1.12	0.76	1.36	1.30	1.09	0.94	1.06	0.74
	Kocaeli	1.12	0.94	0.95	0.90	0.99	1.01	1.01	1.05	1.09	0.94	1.01	0.99
	Sakarya	1.25	0.90	1.11	1.04	1.04	0.90	0.93	1.01	0.88	0.88	1.02	1.05
	Tekirdag	0.98	0.92	0.85	0.85	1.11	1.15	0.96	1.06	0.99	1.09	1.04	1.00
	Yalova	0.58	0.67	0.71	0.71	0.64	0.51	1.34	1.37	1.40	1.31	1.30	1.45
Mediterran	Adana	1.03	0.91	1.07	1.01	1.21	0.98	0.96	1.06	0.96	0.95	0.89	0.96
	Antalya	0.80	0.92	0.74	0.95	1.09	1.17	1.15	1.34	1.25	1.03	0.75	0.80
	Burdur	1.03	0.95	0.90	0.99	0.93	1.04	1.13	0.95	0.99	0.99	1.04	1.06
	Hatay	0.95	0.94	0.96	0.98	1.01	0.96	0.92	1.06	1.07	1.09	1.00	1.05
	Isparta	0.92	1.38	1.10	1.08	0.97	0.91	1.06	0.93	0.92	1.02	0.89	0.83
	Icel	0.96	0.97	1.02	1.12	1.06	0.98	1.04	1.08	0.96	0.92	0.95	0.95
	Kah. Maras	0.96	1.05	1.08	1.06	0.88	0.94	1.04	1.01	0.99	1.00	0.99	1.00
SE.Anatoli	Adiyaman	0.90	0.92	0.98	0.97	0.77	0.82	0.82	1.08	1.13	0.99	1.48	1.12
	Diyarbakir	0.93	0.97	1.07	1.02	0.96	0.99	0.95	0.93	1.09	1.12	1.00	0.96
	Gaziantep	0.95	1.03	1.06	1.06	1.06	0.97	1.04	1.00	0.96	1.03	1.01	0.84
	Mardin	1.03	0.88	0.91	1.02	0.82	0.91	1.00	1.09	0.80	1.10	1.28	1.16
	Siirt	0.81	1.14	0.87	1.07	1.19	1.10	1.13	0.96	0.97	0.96	0.95	0.87
	Sanli Urfa	0.76	0.84	0.83	0.76	0.85	1.32	0.79	1.14	0.82	1.46	1.64	0.79
	Batman	0.99	1.08	0.95	1.37	0.94	0.94	0.95	0.95	0.94	0.94	0.94	1.00
	Sirnak	0.66	0.75	0.75	0.75	1.87	0.75	2.84	0.75	0.75	0.75	0.69	0.66
TURKEY TOTAL		0.89	0.94	0.90	0.97	1.07	1.05	1.15	1.22	1.08	0.97	0.88	0.88

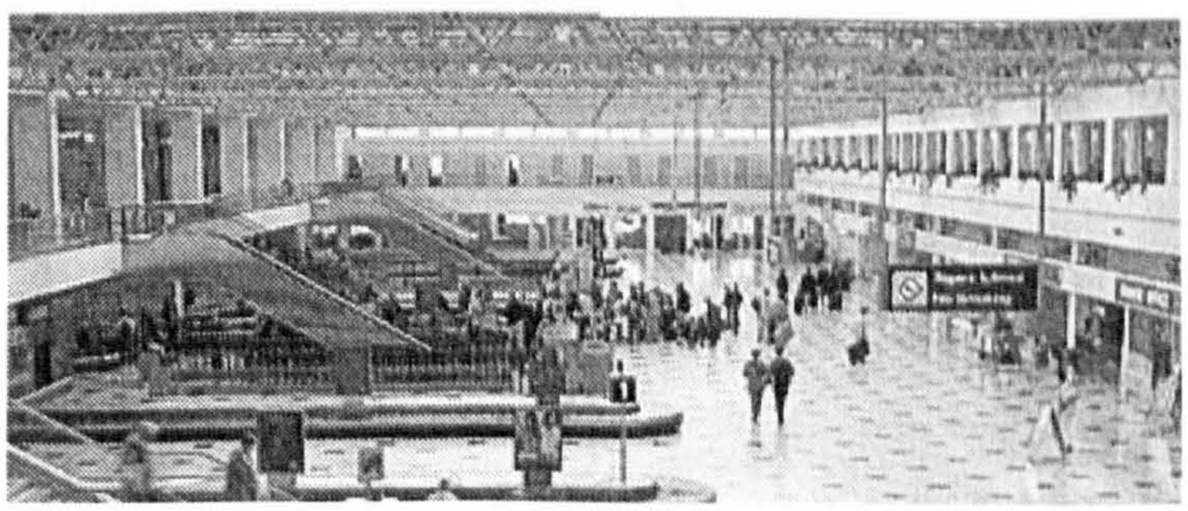
Appendix 94. The seasonal indices for average overall length of stay by province (1994-1996)

REGION	Province	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Aegean	Afyon	0.86	0.99	0.77	1.02	1.17	1.18	0.82	0.95	1.26	1.05	0.89	1.04
	Aydin	0.54	0.49	0.49	0.90	1.38	1.44	1.62	1.52	1.46	1.28	0.42	0.45
	Denizli	1.06	1.05	1.03	1.02	0.98	0.97	0.93	1.00	0.90	1.03	1.00	1.04
	Izmir	0.73	0.77	0.70	0.91	1.11	1.28	1.33	1.34	1.20	1.13	0.76	0.74
	Kutahya	0.86	1.21	0.87	0.84	1.02	1.07	1.37	1.32	1.03	0.84	0.75	0.82
	Manisa	1.03	1.00	1.03	1.09	0.97	0.94	1.04	0.97	0.94	0.99	0.97	1.04
	Mugla	0.73	0.95	0.90	1.11	1.22	1.15	1.24	1.19	1.21	1.16	0.69	0.45
	Usak	1.00	1.10	1.07	0.94	1.14	0.90	1.19	0.90	0.96	0.90	0.96	0.95
Black Sea	Amasya	0.94	1.02	1.11	1.12	1.01	0.97	1.01	0.91	1.05	0.99	0.96	0.90
	Artvin	1.02	1.26	1.03	1.06	0.85	1.02	1.03	1.04	0.86	0.92	0.88	1.03
	Bolu	1.24	1.16	1.11	0.87	0.87	0.91	1.14	0.96	0.87	0.91	0.90	1.06
	Corum	1.01	1.03	1.04	0.94	1.01	0.99	0.90	0.91	0.98	1.03	1.13	1.03
	Giresun	0.99	1.03	1.00	0.98	0.97	1.02	0.96	0.93	0.99	1.07	1.03	1.03
	Gumushane	0.37	0.37	0.45	0.98	2.06	0.96	0.72	1.31	2.79	0.73	0.83	0.44
	Kastamonu	0.95	0.94	0.91	1.11	1.05	1.08	0.90	1.08	1.01	1.07	0.95	0.95
	Ordu	1.16	0.92	0.91	0.97	0.93	0.88	0.92	1.08	0.96	1.11	1.10	1.06
	Rize	1.07	1.10	0.97	0.94	0.94	0.98	0.98	0.96	0.81	1.17	1.03	1.06
	Samsun	0.99	0.98	0.98	0.97	0.98	1.04	0.96	1.01	1.02	1.06	1.01	1.00
	Sinop	1.05	0.96	1.10	0.98	0.95	0.98	1.04	0.95	0.95	0.92	1.03	1.10
	Tokat	1.07	1.02	1.13	0.96	1.03	1.02	1.14	0.99	0.85	0.91	0.91	0.97
	Trabzon	0.99	0.90	0.87	1.06	1.05	1.12	0.94	1.18	1.02	0.95	0.95	0.97
	Zonguldak	1.04	1.02	0.81	0.85	0.96	1.23	1.06	0.94	0.92	0.92	1.24	1.02
	Bartin	1.16	1.29	0.80	0.82	1.10	0.96	0.91	0.91	0.91	0.86	1.05	1.22
	Karabuk	0.63	0.61	0.62	0.66	0.68	0.73	1.13	1.32	1.44	1.52	1.37	1.29
C.Anatolia	Ankara	1.00	1.08	1.04	1.03	0.96	0.96	0.94	0.94	0.99	1.00	1.02	1.03
	Cankiri	1.02	1.11	1.09	0.94	1.07	0.47	0.37	2.01	0.85	1.07	0.98	1.01
	Eskisehir	1.03	0.95	1.07	1.02	0.99	0.92	0.92	1.00	0.89	1.21	0.99	1.00
	Kayseri	0.95	1.14	1.21	0.98	1.02	1.00	0.96	1.05	0.87	0.97	0.90	0.93
	Kirsehir	0.80	1.17	1.26	1.08	1.37	0.77	1.06	0.93	1.00	0.95	0.83	0.79
	Konya	1.13	1.00	0.99	0.93	0.95	0.99	1.12	1.00	0.96	0.97	0.96	1.01
	Nevsehir	0.77	0.85	0.92	0.96	1.12	1.16	1.13	1.03	1.03	1.00	0.97	1.05
	Nigde	1.26	0.83	1.30	1.10	1.33	1.38	0.89	0.73	0.93	1.23	0.54	0.50
	Sivas	1.02	1.06	1.01	0.98	1.03	0.98	0.94	0.94	0.96	0.94	0.96	1.19
	Yozgat	1.25	0.81	0.60	0.67	0.49	2.63	1.61	0.71	1.10	0.64	0.62	0.86
	Aksaray	0.94	0.99	0.98	1.03	1.00	1.06	0.93	0.98	1.15	0.90	0.91	1.13
	Karaman	1.15	1.04	0.99	0.90	1.06	1.27	0.99	1.04	0.82	0.96	0.98	0.80
	Kirikkale	0.84	0.79	3.16	1.21	0.76	0.63	0.77	1.24	0.46	0.66	0.78	0.69
E.Anatolia	Agri	0.94	0.89	0.97	1.08	1.09	1.01	0.99	1.05	1.00	1.00	1.03	0.95
	Bingol	0.86	1.15	1.05	0.94	0.88	0.92	0.96	0.88	1.22	0.92	1.11	1.10
	Bitlis	0.54	0.39	0.31	0.27	1.23	1.23	0.94	3.02	0.57	2.95	0.54	0.00
	Elazig	0.97	1.13	1.03	1.03	0.95	0.95	1.06	0.99	0.92	1.06	0.96	0.95
	Erzincan	1.55	1.65	1.64	0.96	1.56	1.55	0.42	0.59	0.53	0.63	0.44	0.48
	Erzurum	1.19	1.33	1.22	1.18	0.89	0.90	0.90	0.85	0.89	0.91	0.82	0.92
	Hakkari	0.92	1.41	1.16	1.27	1.05	0.89	1.08	0.88	0.85	0.75	0.83	0.91
	Kars	0.43	1.94	1.40	0.92	3.87	0.53	0.54	0.56	0.53	0.55	0.32	0.41
	Malatya	1.04	0.92	1.00	1.00	1.06	0.98	0.98	0.94	1.09	1.11	0.84	1.02
	Tunceli	1.00	0.79	1.00	0.86	0.92	0.99	0.99	1.28	0.98	1.18	0.85	1.15
	Van	0.89	0.99	1.04	0.99	1.00	1.09	1.06	1.12	0.94	0.98	0.96	0.93
	Igdir	1.02	0.98	0.99	1.15	0.97	0.96	1.17	1.17	0.88	0.90	0.90	0.91
Marmara	Balikesir	0.72	0.74	0.73	0.78	1.09	1.25	1.48	1.48	1.17	1.01	0.79	0.75
	Bilecik	0.75	1.47	0.89	0.85	0.77	1.03	1.40	0.97	1.01	0.87	0.94	1.04
	Bursa	1.05	1.10	0.98	0.90	0.90	0.95	0.94	0.92	0.87	0.95	1.17	1.26
	Canakkale	1.03	0.94	0.96	0.98	1.04	1.05	1.06	1.13	0.99	0.93	0.95	0.94
	Edirne	1.08	0.94	0.94	1.15	1.04	0.94	1.00	0.95	0.93	1.03	0.85	1.16
	Istanbul	1.00	1.07	1.03	0.98	0.98	0.96	1.01	1.04	0.94	1.00	1.00	0.98
	Kirklareli	0.84	0.75	1.00	1.19	1.20	0.80	1.08	1.09	1.21	1.02	1.15	0.67
	Kocaeli	1.10	0.96	0.96	0.85	0.97	1.02	0.99	1.03	1.08	1.00	1.06	0.97
	Sakarya	1.13	0.88	1.08	1.03	1.00	0.87	1.04	1.08	0.95	0.91	1.03	1.00
	Tekirdag	0.93	1.27	0.81	0.84	1.09	1.12	0.90	1.00	0.96	1.08	1.03	0.97
	Yalova	0.58	0.67	0.73	0.72	0.63	0.53	1.47	1.30	1.33	1.31	1.29	1.43
Mediterran	Adana	1.05	0.92	1.05	0.98	1.20	0.98	0.94	1.04	0.93	0.93	0.98	1.00
	Antalya	0.84	0.85	0.87	0.96	1.06	1.14	1.04	1.14	1.15	1.13	0.99	0.83
	Burdur	1.03	0.95	0.90	0.98	0.93	1.03	1.15	0.96	0.98	0.99	1.04	1.06
	Hatay	1.09	0.97	0.97	0.98	0.98	0.98	0.91	0.98	1.00	1.05	1.02	1.07
	Isparta	0.94	1.36	1.12	1.03	0.96	0.92	0.99	0.91	0.94	1.07	0.89	0.88
	Icel	0.94	0.96	1.02	1.08	1.03	0.98	1.03	1.12	1.02	0.93	0.93	0.95
	Kah. Maras	0.94	1.02	1.07	1.04	0.92	1.01	1.09	1.02	0.97	0.98	1.00	0.96
SE.Anatoli	Adiyaman	0.89	0.91	0.97	0.96	0.79	0.86	0.94	1.09	1.06	0.99	1.47	1.09
	Diyarbakir	0.94	0.97	1.08	1.02	0.96	0.99	0.94	0.94	1.08	1.12	1.01	0.96
	Gaziantep	0.96	1.01	1.05	1.00	1.04	0.97	1.04	0.99	1.02	1.03	1.03	0.86
	Mardin	1.03	0.88	0.95	1.02	0.80	0.89	1.01	1.07	0.80	1.10	1.30	1.14
	Siirt	0.81	1.14	0.87	1.07	1.19	1.10	1.13	0.97	0.97	0.96	0.95	0.87
	Sanli Urfa	0.74	0.83	0.83	0.79	0.90	1.35	0.78	1.13	0.80	1.49	1.58	0.77
	Batman	0.99	1.08	0.95	1.37	0.94	0.94	0.95	0.95	0.94	0.95	0.94	1.00
	Sirnak	0.67	0.76	0.76	0.76	1.87	0.76	2.80	0.76	0.76	0.76	0.70	0.67
TURKEY TOTAL		0.74	0.80	0.82	0.98	1.14	1.20	1.23	1.27	1.17	1.13	0.78	0.74

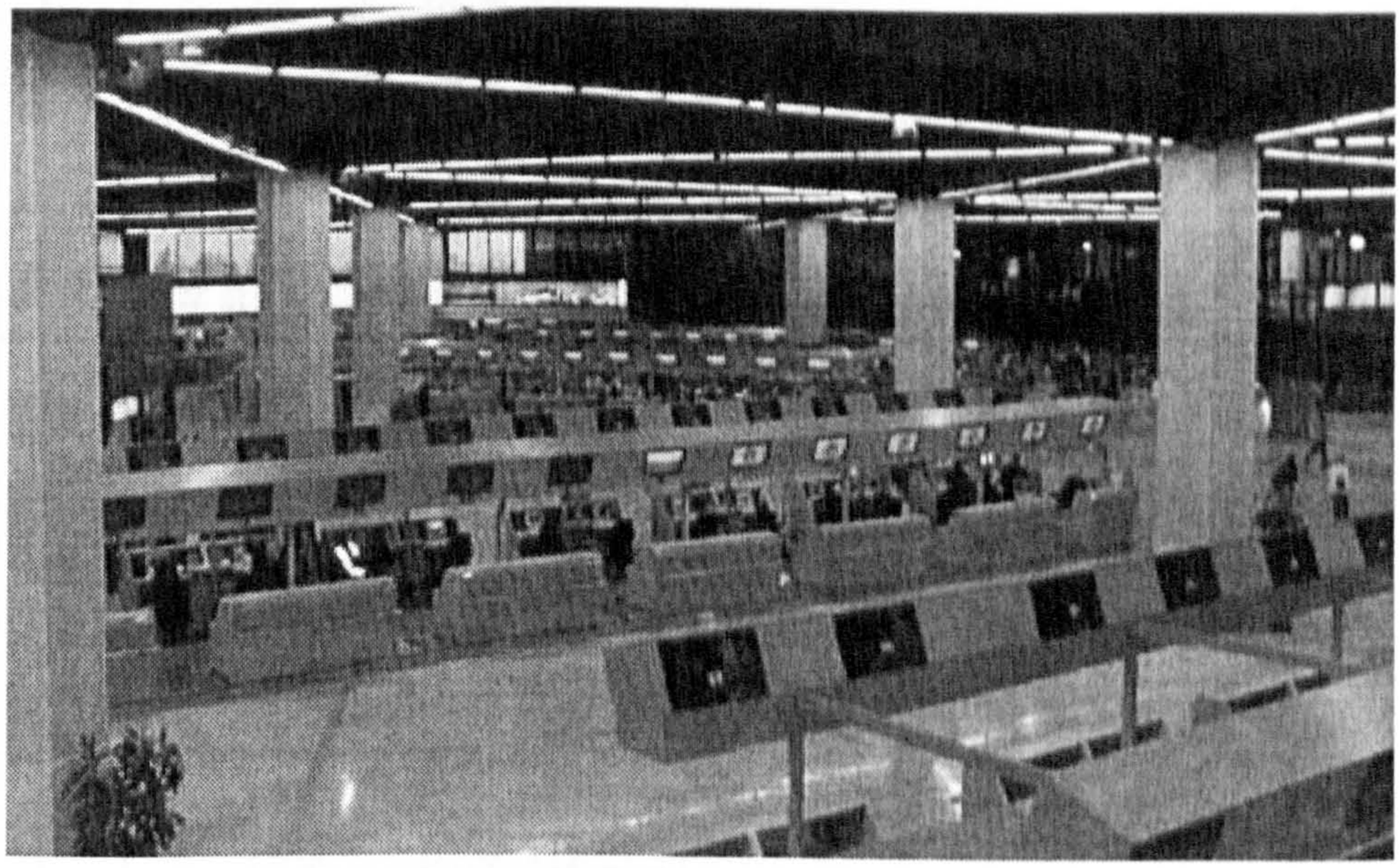
Appendix 95. Views from Antalya International Airport







Appendix 96. Views from Istanbul Ataturk International Airport



Appendix 97 Demographic profile of visitors by shoulder- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS			*GERMAN MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS*		
	1st shoulder	2nd shoulder	Total shoulder season	1st shoulder	2nd shoulder	Total shoulder season
Gender	**Male** (56.5%) *Female*	**Male** (57.7%) Female	**Male** (57.1%) Female	**Male** (54.6%) Female	**Male** (58.1%) Female	**Male** (56.2%) Female
Age	**45-54** (29.6%) **25-34** (26.9%) 35-44, 55-64	**25-34** (33.6%) **45-54** (32.8%) 35-44, 55-64	**45-54** (31.3%) **25-34** (30.4%) 35-44, 55-64	**25-34** (25.2%) **45-54,35-44** (19+19%) 55-64, 16-24	**25-34** (26.9%) **45-54,35-44** (22+18%) 55-64, 16-24	25-34 (26.0%) **45-54,35-44** (20+18%) 55-64, 16-24
Employment status	**Office workers** (42.5%) Self-Employ. (18.9%) Employer (13.2%) Housewife (6.6%)	**Office workers** (35.0%) Self-Employ. (17.9%) Employer (13.0%) Retired (12.2%)	**Office workers** (38.4%) Self-Employ. (18.3%) Employer (13.1%) Retired (8.3%)	**Office workers** (48.9%) Retired (11.8%) Self-Employed (10.7%) Student (10.3%)	**Office workers** (54.1%) Retired (11.9%) Manual workers (10.4%) Self-Employed (9.3%)	**Office workers** (51.3%) Retired (11.8%) Self-Employed (10.1%) M.work.,Student(8+8))
Education	**Coll./Univers.** (57.4%) Sec./HighSchool (26.9) Postgraduate (15.7%)	**Coll./Univers.** (51.2%) Sec./HighSchool (24.4) Postgraduate (22.0%)	**Coll./Univers.** (54.1%) Sec./HighSchool (25.5) Postgraduate (19.0%)	**Ele./Primary** (46.2%) Coll./University (26.2) Sec./HighSchool (21.6)	**Ele./Primary** (58.4%) Coll./University (22%) Sec./HighSchool(13.9%)	**Ele./Primary** (51.8%) Coll./Universi. (24.3%) Sec./HighSchool (18%)
Annual Family Income	**Over £30000** (63.4%) £21000-£30000 (16.8) £16000-£20000 (10.9)	**Over £30000** (47.9%) £21000-£30000 (18.8) £11000-£15000 (14.5)	**Over £30000** (55.0%) £21000-£30000 (17.9) £16-20 & £11-15000	**Over £30000** (23.3%) £21-30000 (18.8%) £11-15000 (18.0)	**£16-20000** (21.9%) **£21-30000** (21.6%) Over £30000 (17.7%)	**Over £30000** (20.7%) **£21-30 £16-20**(20+20) **£11-15000** (16.8%)
Family status	**Married** (64.8%) Single (16.7%) Couple (9.3%)	**Married** (53.7%) Single (26.8%) Couple (12.2%)	**Married** (58.9%) Single (22.1%) Couple (10.8%)	**Married** (52.2%) Single (22.3%) Couple (16.8%)	**Married** (56.8%) Single (19.5%) Couple (15.9%)	**Married** (54.3%) Single (21.0%) Couple (16.4%)
Having child home?	**Have no child** (54.4%) have child home	**have no child** (63.2%) have child home	**have no child** (58.8%) have child home	**have no child** (58.1%) have child home	**have no child** (55.6%) have child home	**have no child** (57.0%) have child home
Visit. with child home	**Married** (90.2%) Couple (4.9%)	**Married** (93.8%) Couple (6.3%)	**Married** (91.8%) Couple (5.5%)	**Married** (85.6%) Couple (4.3%), Divorc.	**Married** (83.3%) Div./Seperated (7.1%)	**Married** (84.5%) Div./Sep.Couple(6+4)
Visitors with no child	**Married** (67.3%) Couple (16.3%)	**Married** (60.0%) Couple (23.6%)	**Married** (63.5%) Couple (20.2%)	**Married** (51.5%) Couple (34.5%)	**Married** (58.2%) Couple (33.5%)	**Married** (54.5%) Couple (34.1%)
Number of child home	**1** (65.9%) 2 (29.3%)	**1** (78.1%) 2 (18.8%)	**1** (71.2%) 2 (24.7%)	**1** (82.7%) 2 (17.3%)	**1** (74.6%) 2 (23.0%)	**1** (78.9%) 2 (20.0%)
Age of children home	**13-16, 21+** (1 child) 0-12(1ch.) 13-16(2ch) 0-12 (2 children)	**0-12** (1 & 2 children) 13-16, 17-21 (1child) 21+ (1 child)	**0-12, 13-16** (1 child) 21+ (1ch.) 0-12 (2ch.) 17-21(1ch) 13-16(2ch)	**21+** (1 child) 0-12, 13-16 (1 child) 17-21(1ch.) 0-12(2ch)	**17-21** (1 child) 0-12, 21+ (1 child) 13-16 (1ch) 21+ (2ch)	**21+, 0-12** (1 child) 17-21, 13-16 (1 child) 0-12, 21+ (2 children)

Appendix 98. Demographic profile of visitors by destination- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS			*GERMAN MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS*		
	Istanbul	Antalya	Total	Istanbul	Antalya	Total
Gender	**Male (57.3%)** *Female*	- -	**Male (57.1%)** Female	**Male (62.6%)** Female	**Male (53.6%)** Female	**Male (56.2%)** Female
Age	**45-54 (31.9%)** **25-34 (30.1%)** 35-44, 55-64	- - -	**45-54 (31.3%)** **25-34 (30.4%)** 35-44, 55-64	**25-34 (26.4%)** **35-44,45-54 (22+22%)** 55-64, 16-24	**25-34 (25.8%)** **45-54,35-44 (20+17%)** 55-64, 16-24	**25-34 (26.0%)** **45-54,35-44 (20+18%)** 55-64, 16-24
Employment status	**Office workers (38.2%)** Self-Employ. (18.7%) Employer (13.3%) Retired (7.6%)	- - - -	**Office workers (38.4%)** Self-Employ. (18.3%) Employer (13.1%) Retired (8.3%)	**Office workers (57.3%)** Self-Employed (10.2%) Retired, Student (8+8) Manual worker (6.5%)	**Office workers (48.8%)** Retired (13.4%) Self-Employed (10%) Manual workers (9%)	**Office workers (51.3%)** Retired (11.8%) Self-Employed (10.1%) M.work.,Student(8+8))
Education	**Coll./Univers. (54.6%)** Sec./HighSchool (25.1) Postgraduate (18.9%)	- - -	**Coll./Univers. (54.1%)** Sec./HighSchool (25.5) Postgraduate (19.0%)	**Ele./Primary (38.1%)** **Coll./University(37.3)** Sec./HighSchool (18.9)	**Ele./Primary (57.5%)** Coll./University (19%) Sec./HighSchool(17.7%)	**Ele./Primary (51.8%)** Coll./Universi. (24.3%) Sec./HighSchool (18%)
Annual Family Income	**Over £30000 (55.6%)** £21-£30000 (18.2) £16-£20000 (11.2)	- - -	**Over £30000 (55%)** £21-£30000 (18%) £16-£20000 (11%)	**Over £30000 (30.7%)** £21-£30000 (21.5%) £16-£20000 (16.6%)	**£16-20 £11-15 £21-30** (20+20+20%) Over £30000 (16.3%)	**Over £30000 (21%)** **£21-30 £16-20(20+20)** **£11-15000 (16.8%)**
Family status	**Married (59.5%)** Single (21.6%) Couple (11%)	- - -	**Married (58.9%)** Single (22.1%) Couple (10.8%)	**Married (54.3%)** Single (28%) Couple (10.3%)	**Married (54.3%)** Couple (18.9%) Single (18.2%)	**Married (54.3%)** Single (21%) Couple (16.4%)
Having child home?	**Have no child (58.3%)** have child home	- -	**have no child (58.8%)** have child home	**have child (51.8%)** have no child home	**have no child (60.1%)** have child home	**have no child (57.0%)** have child home
Visit. with child home	**Married (91.8%)** Couple (5.5%)	- -	**Married (91.8%)** Couple (5.5%)	**Married (89.4%)** Couple (6%), Divorc.	**Married (82.3%)** Couple, Div./Sep.(6+6)	**Married (84.5%)** Div./Sep.Couple(6+4)
Visitors with no child	**Married (63.7%)** Couple (20.6%)	- -	**Married (63.7%)** Couple (20.6%)	**Married (57.0%)** Couple (31.6%)	**Married (53.8%)** Couple (34.8%)	**Married (54.5%)** Couple (34.1%)
Number of child home	**1 (71.2%)** 2 (24.7%)	- -	**1 (71.2%)** 2 (24.7%)	**1 (82.4%)** 2 (16.5%)	**1 (77.2%)** 2 (21.7%)	**1 (78.9%)** 2 (20.0%)
Age of children home	**0-12, 13-16 (1 child)** 21+ (1ch.) 0-12 (2 ch.) 17-21(1ch) 13-16(1ch)	- - -	**0-12, 13-16 (1 child)** 21+ (1ch.) 0-12 (2 ch.) 17-21(1ch) 13-16(1ch)	**21+, 0-12 (1 child)** 0-12 (2ch.) 13-16(1ch) 17-21 (1 child)	**21+, 0-12 (1 child)** 17-21, 13-16 (1 child) 21+, 17-21 (2 children)	**21+, 0-12 (1 child)** 17-21, 13-16 (1 child) 0-12, 21+ (2 children)

Appendix 99. Demographic profile of all visitors by shoulder & destination- * Bold letters and figures indicate most important segments

	ALL SHOULDER MARKET'S "DEMOGRAPHIC" CHARACTERISTICS			*ALL SHOULDER MARKET'S "DEMOGRAPHIC" CHARACTERISTICS*		
	1st Shoulder	2nd Shoulder	Total	Istanbul	Antalya	Total
Gender	**Male** (54.9%) *Female*	**Male** (58.0%) Female	**Male** (56.4%) Female	**Male** (60.0%) Female	**Male** (53.6%) Female	**Male** (56.4%) Female
Age	**25-34** (25.5%) **45-54** (21.1%) 35-44, 55-64	**25-34** (28.5%) **45-54** (24.6%) 35-44, 55-64	**25-34** (26.9%) **45-54** (22.7%) 35-44, 55-64	**25-34** (28.2%) **45-54** (26.5%) 35-44, 55-64	**25-34** (26.0%) **45-54** (19.8%) 35-44, 55-64	**25-34** (26.9%) **45-54** (22.7%) 35-44, 55-64
Employment status	**Office workers** (47.7%) Self-Employ. (12.2%) Retired (10.3%) Student (9.0%)	**Office workers** (49.5%) Retired (12.0%) Self-Employ. (11.4%) Manual worker (9.4%)	**Office workers** (48.6%) Self-Employ. (11.8%) Retired (11.1%) Manual worker (7.8%)	**Office workers** (48.2%) Self-Employed (14.2%) Retired,Employer(8+8) Manual worker (6.4%)	**Office workers** (48.8%) Retired (13.6%) Self-Employed (10%) Manual worker (9%)	**Office workers** (48.6%) Self-Employed (11.8%) Retired (11.1%) Manual worker (7.8%)
Education	**Ele./Primary** (37.3%) **Coll./Univers.** (32.3%) Sec./HighSchool (22.6)	**Ele./Primary** (44.4%) **Coll./Univers.** (29.1%) Sec./HighSchool (16.4)	**Ele./Primary** (40.6%) **Coll./Univers.** (30.8%) Sec./HighSchool (19.7)	**Coll./Univers.** (45.6%) Sec./HighSchool (21.9) Ele./Primary (20.0%)	**Ele./Primary** (57.1%) Coll./Univers. (18.9%) Sec./HighSchool (17.9)	**Ele./Primary** (40.6%) **Coll./Univers.** (30.8%) Sec./HighSchool (19.7)
Annual Family Income	**Over £30000** (32.2%) £21000-£30000 (18.4) £16000-£20000 (15.3)	**Over £30000** (26.0%) £21000-£30000 (20.8) £16000-£20000 (19.0)	**Over £30000** (29.2%) £21000-£30000 (19.6) £160000-20000 (17.1)	**Over £30000** (43.4%) £21000-30000 (19.8%) £16000-20000 (13.8%)	**£16000-20000** (20%) **£11000-15000** (19.8) £21000-£30000 (19.4)	**Over £30000** (29.2%) £21000-30000 (19.6) £16000-20000 (17.1)
Family status	**Married** (54.6%) Single (21.2%) Couple (15.4%)	**Married** (56.0%) Single (21.3%) Couple (15.0%)	**Married** (55.3%) Single (21.2%) Couple (15.2%)	**Married** (56.8%) Single (24.9%) Couple (10.6%)	**Married** (54.1%) Couple (18.7%) Single (18.4%)	**Married** (55.3%) Single (21.2%) Couple (15.2%)
Having child home?	**Have no child** (57.3%) have child home	**have no child** (57.4%) have child home	**have no child** (57.4%) have child home	**have no child** (53.4%) have child home	**have no child** (60.3%) have child home	**have no child** (57.4%) have child home
Visit. with child home	**Married** (86.1%) Couple.Div/Sep. (5+5)	**Married** (85.4%) Div./Seperated (5.7%)	**Married** (85.8%) Div.Sep(5%)Couple(4)	**Married** (90.5%) Div./Seperated (4.4%).	**Married** (81.7%) Couple-Div/Sep. (6+6)	**Married** (85.8%) Div.Sep(5%)Couple(4)
Visitors with no child	**Married** (54.7%) Couple (30.9%)	**Married** (58.7%) Couple (31.0%)	**Married** (56.6%) Couple (30.9%)	**Married** (60.8%) Couple (25.4%)	**Married** (53.8%) Couple (34.5%)	**Married** (56.6%) Couple (30.9%)
Number of child home	**1** (78.9%) 2 (20.0%)	**1** (75.3%) 2 (22.2%)	**1** (77.2%) 2 (21.0%)	**1** (77.2%) 2 (20.3%)	**1** (77.2%) 2 (21.7%)	**1** (77.2%) 2 (21.0%)
Age of children home	**21+, 0-12** (1 child) 13-16 (1 child) 17-21, 0-12 (2 childr.)	**17-21, 0-12** (1 child.) 21+, 13-16 (1 child) 0-12, 21+ (2 child)	**21+, 0-12** (1 child) 13-16, 17-21 (1 child) 0-12, 21+ (2 child)	**21+, 0-12** (1 child) 13-16 (1ch) 0-12 (2ch) 17-21(1ch) 13-16(2ch)	**21+, 0-12** (1 child) 17-21, 13-16 (1child) 21+, 17-21 (2 child)	**21+, 0-12** (1 child) 13-16, 17-21 (1 child) 0-12, 21+ (2 child)

Appendix 100. Demographic profile of holiday/vacation visitors by shoulder- * Bold letters and figures indicate most important segments

	BRITISH HOLIDAY/VACATION MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS (ISTANBUL)			*BRITISH HOLIDAY/VACATION MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS (ANTALYA)*		
	1st shoulder	2nd shoulder	Total shoulder season	1st shoulder	2nd shoulder	Total shoulder season
Gender	**Female** (52.5%) *Male (47.5)*	**Male** (53.0%) Female	**Male** (50.4%) Female	**NA**	**NA**	**NA**
Age	**45-54** (30.5%) 25-34 (25.4%) 55-64, 35-44	**45-54** (33.8%) 25-34 (30.8%) 35-44, 55-64	**45-54** (32.3%) 25-34 (28.2%) 35-44, 55-64			
Employment status	**Office workers** (44.8%) Self-Employ. (18.9%) Employer (10.3%) Housewife (10.3%)	**Office workers** (25.8%) Self-Employ. (21.2%) Retired (18.1%) Employer (13.6%)	**Office workers** (34.7%) Self-Employ. (20.2%) Employer (12.1%) Retired (12.1%)			
Education	**Coll./Univers.** (50.8%) Sec./HighSchool (30.5) Postgraduate (18.6%)	**Coll./Univers.** (47.0%) Sec./HighSchool (27.3) Postgraduate (22.7%)	**Coll./Univers.** (48.8%) Sec./HighSchool (28.8) Postgraduate (20.8%)			
Annual Family Income	**Over £30000** (63.0%) £16000-£20000 (14.8) £21000-£30000 (13.0)	**Over £30000** (46.0%) £11000-£15000 (17.5) £16-20&£21-30000	**Over £30000** (53.8%) £16000-£20000 (15.4) £21-30&£11-15000			
Family status	**Married** (64.4%) Single (16.9%) Couple (6.8%)	**Married** (45.5%) Single (31.8%) Couple (15.2%)	**Married** (54.4%) Single (24.8%) Couple (11.2%)			
Having child home?	**Have no child** (65.3%) have child home	**have no child** (73.3%) have child home	**have no child** (69.1%) have child home			
Visit. with child home	**Married** (88.2 %) Couple/Div./Sep. (6+6)	**Married** (91.7%) Couple (8.3%)	**Married** (89.7%) Couple (6.9%)			
Visitors with no child	**Married** (71.9%) Coup./Div/Wid(9+9+9)	**Married** (57.6%) Couple (27.3%)	**Married** (64.6%) Couple (18.5%)			
Number of child home	**1** (70.6%) **2** (23.5%)	**1** (75.0%) **2** (25.0%)	**1** (72.4%) **2** (24.1%)			
Age of children home			**21+, 13-16 (1 child)** **17-21 (1child)** **0-12 (2 child)**			

Appendix 101. Demographic profile of holiday/vacation visitors by shoulder- * Bold letters and figures indicate most important segments

	GERMAN HOLIDAY/VACATION MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS (ISTANBUL)			*GERMAN HOLIDAY/VACATION MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS (ANTALYA)*		
	1st shoulder	2nd shoulder	Total shoulder season	1st shoulder	2nd shoulder	Total shoulder season
Gender	**Male** (63.3%) *Female*	**Male** (54.0%) Female	**Male** (59.2%) Female	**Male** (50.7%) Female	**Male** (57.7%) Female	**Male** (54.0%) Female
Age	**45-54** (25.3%) 55-64 (20.3%) 35-44, 25-34	**25-34** (31.7%) 45-54 (20.6%) 16-24, 35-44	**25-34** (23.9%) 45-54 (23.2%) 35-44, 55-64 (19+15)	**25-34** (26.8%) 35-44 (17.4%) 45-54/55-64 (16+16)	**25-34** (25.1%) **45-54** (23.6%) 55-64, 35-44 (18+15)	25-34 (26.0%) 45-54, (19.6%) 55-64, 35-44 (17+17)
Employment status	**Office workers** (54.4%) Retired (13.9%) Self-Employ. (10.1%) Manual worker(10.1%)	**Office workers** (55.6%) Student (15.9%) Self-Employ. (11.1%) Retired/Housewife (5+5)	**Office workers** (54.9%) Self-Employ. (10.6%) Retired (9.9%) Student (9.2%)	**Office workers** (44.8%) Student (12.8%) Retired (12.5%) Self-Employed (11.4%)	**Office workers** (53.8%) Retired (14.3%) Manual workers (12.0%) Self-Employed (8.7%)	**Office workers** (49.0%) Retired (13.3%) Self-Employed (10.1%) Manual work. (9.1))
Education	**Ele./Primary**(43.0%) Coll./University (32.9) Sec./HighSchool (20.3)	**Ele./Primary**(40.3%) Coll./University (33.9) Sec./HighSchool (17.7)	**Ele./Primary**(41.8%) Coll./University (33.3) Sec./HighSchool (19.1)	**Ele./Primary** (49.7%) Sec./HighSchool (23.3) Coll./University (20.5)	**Ele./Primary** (66.7%) Coll./University (17.4) Sec./HighSchool(10.6%)	**Ele./Primary** (57.8%) Coll./Universi. (19.0%) Sec./HighSchool (17.2)
Annual Family Income	**£16000-£20000** (25.4) Over £30000 (23.8%) £21-£30&£11-	**£21000-£30000** (25.5) Over £30000 (21.8%) Less than £5000 (20.0)	**Over £30000** (22.9%) £21000-£30000 (21.2) £16000-20000 (19.5)	**£21-30000** (21.7%) £11-15000 (20.8) £30000+/£16-	**£16-20000** (24.2%) **£11-15000** (19.0%) £21-30/£5-10000 (19+17)	**£21-30 £16-20**(20+20) £11000-£15000 (20.0) **+£30000/ £5-10**(16+15)
Family status	**Married** (59.0%) Single (19.2%) Couple (11.5%)	**Married** (46.8%) Single (35.5%) Couple (12.9%)	**Married** (53.6%) Single (26.4%) Couple (12.1%)	**Married** (49.2%) Single (21.5%) Couple (20.2%)	**Married** (61.3%) Couple (17.7%) Single (14.3%)	**Married** (54.9%) Couple (19.0%) Single (18.1%)
Having child home?	**Have child** (52.5%) have no child home	**have no child** (59.5%) have child home	**have no child** (%) have child home	**have no child** (62.8%) have child home	**have no child** (57.9%) have child home	**have no child** (%) have child home
Visit. with child home	**Married** (90.3%) Widowed (6.5%)	**Married** (86.7%) Div./Seperated (13.3%)	**Married** (89.1%) Div./Seperated (6.5%)	**Married** (82.5%) Couple (7.5%)	**Married** (85.2%) Couple (5.7%)	**Married** (83.9%) Couple(6.5%)
Visitors with no child	**Married** (46.4%) Couple (32.1%)	**Married** (59.1%) Couple (36.4%)	**Married** (64.6%) Couple (18.5%)	**Married** (48.9%) Couple (36.5%)	**Married** (59.5%) Couple (32.2%)	**Married** (53.9%) Couple (34.5%)
Number of child home	**1** (70.6%) **2** (23.5%)	**1** (75.0%) **2** (25.0%)	**1** (80.4%) **2** (17.4%)	**1** (85.0%) **2** (15.0%)	**1** (70.5%) **2** (27.3%)	**1** (77.4%) **2** (21.4%)
Age of children home			**Over 21, (1 child)** **0-12, 17-21 (1 child)** **13-16 (1ch)**			**Over 21, (1 child)** **0-12, 17-21 (1 child)** **13-16 (1ch)**

Appendix 102. Demographic profile of business visitors by shoulder- * Bold letters and figures indicate most important segments
**British business visitors and German business visitors to Antalya were excluded because of lack of business visitors to Antalya

	BRITISH BUSINESS MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS (ISTANBUL)			*GERMAN BUSINESS MARKET'S MAIN "DEMOGRAPHIC" CHARACTARISTICS (ISTANBUL)*		
	1st Shoulder	2nd Shoulder	Total	1st Shoulder	2nd Shoulder	Total
Gender	**Male (78.9%)** *Female*	**Male (79.5%)** Female	**Male (79%)** Female	**Male (78.4%)** *Female*	**Male (80.0%)** Female	**Male (79%)** Female
Age	**45-54 (31.6%)** **25-34 (28.9%)** 35-44, 55-64 (18+18)	**25-34/45-54(39+39)** **35-44 (12.8%)** 55-64 (7.7%)	**25-34 (33.8%)** **45-54 (35.1%)** 35-44, 55-64 (16+13)	**45-54 (29.7%)** **25-34 (27.0%)** 35-44, 55-64 (24+14)	**25-34 (44.0%)** **35-44 (36%)** 45-54 (12.0%)	**25-34 (33.9%)** **35-44 (29.0%)** 45-54, 55-64 (23+10)
Employment status	**Office workers (37.8%)** Self-Employ. (22%) Employer (22%) Manual workers (13.5)	**Office workers (51.3%)** Self-Employ. (15.4%) Manual workers (7.7) Retired (3%)	**Office workers (44.7%)** Employer (19.7%) Self-Employ. (18.4%) Manual workers (10.5)	**Office workers (73.0%)** Self-Employ. (16.2%) Employer (8.1%) -	**Office workers (72.0%)** Self-Employ. (16.0%) Manual workers (12.0)	**Office workers (72.6%)** Self-Employ. (16.1%) Employer (4.8%) Manual workers (4.8)
Education	**Coll./Univers. (68.4%)** Sec./HighSchool (18.4) Postgraduate (13.2%)	**Coll./Univers. (61.5%)** Postgraduate (23.1%) Sec./HighSchool (15.4)	**Coll./Univers. (64.9%)** Postgraduate (18.2%) Sec./HighSchool (16.9)	**Coll./Univers. (54.1%)** Sec./HighSchool (19%) Ele./Primary (19%)	**Coll./Univers. (44%)** Ele./Primary (28.0) Sec./HighSchool (20.0)	**Coll./Univers. (50%)** Ele./Primary (22.6) Sec./HighSchool (19.4)
Annual Family Income	**Over £30000 (75.0%)** £21000-£30000 (19.4) £16000-£20000 (5.6)	**Over £30000 (60.5%)** £21000-£30000 (31.6) £11000-£15000 (5.3)	**Over £30000 (67.6%)** £21000-£30000 (25.7) £16-20 & £11-15000	**Over £30000 (70.6%)** £21000-£30000 (14.7) £5000-£10000 (8.8)	**£21000-£30000 (52.4)** Over £30000 (28.6%) £16000-£20000 (9.5)	**Over £30000 (54.5%)** £21000-£30000 (29.1) £5-10 & £16-20 (7+6)
Family status	**Married (71.1%)** Single (13.2%) Couple (7.9%)	**Married (61.5%)** Single (20.5%) Couple (10.3%)	**Married (66.2%)** Single (16.9%) Couple (9.1%)	**Married (64.9%)** Single (29.7%) Couple (2.7%)	**Married (48.0%)** Single (32.0%) Couple (12.0%)	**Married (58.1%)** Single (30.6%) Couple (6.5%)
Having child home?	**Have child (63.6%)** have no child home	**have no child (50.0%)** have child home (50.0)	**have no child (57.1%)** have child home	**Have child (62.5%)** have no child home	**have child (64.7%)** have no child home	**have child (63.4%)** have no child home
Visit. with child home	**Married (92.3%)** Div./Separated (5.1%)	**Married (93.3%)** Couple (6.7%)	**Married (94.4%)** Couple (2.8%)	**Married (100%)** -	**Married (81.8%)** Couple (18.2%)	**Married (92.3%)** Couple (7.7%)
Visitors with no child	**Married (58.3%)** Couple (25.0%)	**Married (60.0%)** Couple (20.0%)	**Married (71.4%)** Couple (28.6%)	**Married (77.8%)** Couple (11.1%)	**Married (50.0%)** Couple (50.0%)	**Married (66.7%)** Couple (26.7%)
Number of child home	**1 (66.7%)** 2 (28.6%)	**1 (80.0%)** 2 (13.3%)	**1 (72.2%)** 2 (22.2%)	**1 (80%)** 2 (20%)	**1 (90.9%)** 2 (9.1%)	**1 (84.6%)** 2 (15.4%)
Age of children home			**0-12, (2 child)** 0-12 /13-16 (1child) 13-16(2ch)			**0-12 (2 child)** 0-12 (1ch.) 13-16(2ch) 13-16 (1ch)17-20(1ch)

Appendix 103. Motivational profile of visitors by shoulder- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "MOTIVATIONAL" CHARACTERISTICS			*GERMAN MARKET'S MAIN "MOTIVATIONAL" CHARACTERISTICS*		
	1st shoulder	2nd shoulder	Total shoulder season	1st shoulder	2nd shoulder	Total shoulder season
Combined Purpose of Visit (Main&2nd Pur.)	**Holiday/Vacat**(46.1%) Business(+meet.)(24.7) Culture(+relig.) (19.5)	**Holiday/Vacat**(42.4%) Business(+meet.)(23.9) Culture(+relig.) (21.7)	**Holiday/Vacat**(44.1%) Business(+meet.)(24.3) Culture(+relig.) (20.7)	**Holiday/Vacat**(62.4%) Culture(+relig.) (25.8) Business(+meet.) (6.8)	**Holiday/Vacat**(64.5%) Culture(+relig.) (22.7) Business(+meet.) (6.2)	**Holiday/Vacat**(63.4%) Culture(+relig.) (24.4) Business(+meet.) (6.5)
Main Purpose of Visit	**Holiday/Vacat**(55.7%) Business(+meet.)(35.8) Vis.Friend&R.(7.5%)	**Holiday/Vacat**(56.9%) Business(+meet.)(31.7) Vis.Friend&R.(5.7%)	**Holiday/Vacat**(56.3%) Business(+meet.)(33.6) Vis.Friend&R.(6.6%)	**Holiday/Vacat**(83.8%) Business(+meet.)(8.7) Culture(+relig.) (4.9)	**Holiday/Vacat**(85.7%) Business(+meet.)(7.0) Culture(+relig.) (4.4)	**Holiday/Vacat**(84.7%) Business(+meet.)(7.9) Culture(+relig.) (4.7)
2nd Purpose of Visit	**Culture(+relig.)** (60.4) Holiday/Vacat(25.0%) Vis.Friend&R.(6.3%)	**Culture(+relig.)** (63.9) Holiday/Vacat(13.1%) Business/work (8.2%)	**Culture(+relig.)** (62.4) Holiday/Vacat(18.3%) Vis.Friend&R.(6.4%)	**Culture(+relig.)** (81.7) Holiday/Vacat(5.3%) Shopping (4.1%)	**Culture(+relig.)** (75.4) Shopping (11.9%) Holiday/Busin.(3.7+3.7)	**Culture(+relig.)** (78.9) Shopping (7.6%) Holiday/Vacat(4.6%)
Attraction Factors	**Hist./Cult.Res** (29.5%) Pop./Diff. Dest. (17.8) Busi./Conf./Meet(14.0) Recommendation(10.9) Know Turkey&Pe.(6.2)	**Hist./Cult.Res** (38.3%) Pop./Diff. Dest. (12.8) Busi./Conf./Meet(12.8) Recommendation (8.3) Cheap Trav. Cost (6.7)	**Hist./Cult.Res** (34.6%) Pop./Diff. Dest. (14.9) Busi./Conf./Meet(13.3) Recommendation (9.4) Cheap Trav. Cost (5.2)	**Hist./Cult.Res** (16.9%) **KnowTurkey&P.**(16.2) Cheap Trav. Cost(13.3) Climate/Weather (8.8) Turkey&Hospit. (7.7)	**CheapTrav.Cost** (20.8) **KnowTurkey&P.**(18.7) Climate/Weather(11.8) Turkey&Hospit. (11.6) Hist./Cult.Res. (10.6%)	**KnowTurkey&P** (17.3) **Cheap Trav.Cost**(16.6) Hist./Cult.Res. (14.2%) Climate/Weather(10.1) Turkey&Hospit. (9.4)
Influential Factors on Timing of Travel	**My/Partner'sJob**(34.0) Busin/Conf/Exh.(18.4) Nothing Particul(13.6) Prefer this time (9.7%) Weather condit.(5.8%)	**Busin/Conf/Exh**(25.7) Nothing Particul(16.7) My/Partner'sJob (15.3) Spec/Cheap offer(14.6) Prefer this time (8.3%)	**My/Partner'sJob**(23.1) **Busin/Conf/Exh**(22.7) Nothing Particul(15.4) Spec/cheap offer (9.7) Prefer this time (8.9%)	**Weather condit.**(26.9) Nothing Particul(20.0) Consid.this time(14.3) Prefer this time (12.9) Child's school (6.5%)	**Weather condit.**(25.2) **NothingParticul**(24.5) Spec/cheap offer (22.2) Consid.this time(9.6) Prefer this time (6.9%)	**Weather condit.**(26.0) Nothing Particul(22.2) Spec/cheap offer (13.5) Consid.this time(11.9) Prefer this time (9.9)
Information Sources	**TravelAgency**(42.3%) Recommendat.(16.9%) Tv/Rad./papers(13.8%)	**TravelAgency**(42.9%) Tv/Rad./papers(21.4%) Recommendat.(14.3%)	**TravelAgency**(42.6%) Tv/Rad./papers(17.6%) Recommendat.(15.6%)	**TravelAgency**(46.8%) Recommendat.(21.6%) Tv/Rad./papers(14.8%)	**TravelAgency**(49.3%) Tv/Rad./papers(18.4%) Recommendat.(18.0%)	**TravelAgency**(47.9%) Recommendat.(20.0%) Tv/Rad./papers(16.3%)

Appendix 104. Motivational profile of visitors by destination- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "MOTIVATIONAL" CHARACTARISTICS			*GERMAN MARKET'S MAIN "MOTIVATIONAL" CHARACTARISTICS*		
	Istanbul	Antalya	Total	Istanbul	Antalya	Total
Combined Purpose of Visit (Main&2nd Pur.)	**Holiday/Vacat(43.4%)** Business(+meet.)(24.6) Culture(+relig.) (21.0)	- - -	**Holiday/Vacat(44.1%)** Business(+meet.)(24.3) Culture(+relig.) (20.7)	**Holiday/Vacat(44.6%)** Culture(+relig.) (23.9) Business(+meet.)(20.8)	**Holiday/Vacat(70.9%)** Culture(+relig.) (24.7) -	**Holiday/Vacat(63.4%)** Culture(+relig.) (24.4) Business(+meet.) (6.5)
Main Purpose of Visit	**Holiday/Vacat(55.6%)** Business(+meet.)(34.2) Vis.Friend&R. (6.7%)	- - -	**Holiday/Vacat(56.3%)** Business(+meet.)(33.6) Vis.Friend&R. (6.6%)	**Holiday/Vacat(58.9%)** Business(+meet.)(25.7) Culture(+relig.) (9.1)	**Holiday/Vacat(95.1%)** Culture(+relig.) (2.9) -	**Holiday/Vacat(84.7%)** Business(+meet.)(7.9) Culture(+relig.) (4.7)
2nd Purpose of Visit	**Culture(+relig.) (62.4)** Holiday/Vacat(18.3%) Vis.Friend&R. (6.4%)	- - -	**Culture(+relig.) (62.4)** Holiday/Vacat(18.3%) Vis.Friend&R. (6.4%)	**Culture(+relig.) (65.1)** Shopping (17.4%) Business(+meet.)(7.0)	**Culture(+relig.) (84.3)** Holiday/Vacat(4.6%) Shopping (3.7%)	**Culture(+relig.) (78.9)** Shopping (7.6%) Holiday/Vacat(4.6%)
Attraction Factors	**Hist./Cult.Res (35.7%)** Pop./Diff. Dest. (15.0) Busi./Conf./Meet(13.7) Recommendation(9.3) Cheap Trav. Cost (5.0)	- - - - -	**Hist./Cult.Res (34.6%)** Pop./Diff. Dest. (14.9) Busi./Conf./Meet(13.3) Recommendation (9.4) Cheap Trav. Cost (5.2)	**Hist./Cult.Res (25.9%)** KnowTurkey&P.(17.2) Busi./Conf./Meet(15.5) Cheap Trav. Cost (7.6) Recommendation (6.2)	**CheapTrav.Cost (19.5)** **KnowTurkey&P.(17.3)** Climate/Weather(12.6) Turkey&Hospit. (11.0) Hist./Cult.Res. (10.0%)	**KnowTurkey&P (17.3)** **Cheap Trav.Cost(16.6)** Hist./Cult.Res. (14.2%) Climate/Weather(10.1) Turkey&Hospit. (9.4)
Influential Factors on Timing of Travel	**My/Partner'sJob(23.7)** **Busin/Conf/Exh(23.2)** Nothing Particul(14.9) Spec/Cheap offer (9.5) Prefer this time (8.7%)	- - - - -	**My/Partner'sJob(23.1)** **Busin/Conf/Exh(22.7)** Nothing Particul(15.4) Spec/Cheap offer (9.7) Prefer this time (8.9%)	**Nothing Particul(23.1)** **Consid this time(20.9)** My/Partner'sJob (13.4) Busin/Conf/Exh.(11.9) Spec/Cheap offer (7.8)	**Weather condit(32.6)** Nothing Particul(21.9) Spec/Cheap offer(15.2) Prefer this time(11.6%) Consid this time(9.2%)	**Weather condit(26.0)** **Nothing Particul(22.2)** Spec/Cheap offer(13.5) Consid.this time(11.9) Prefer this time (9.9%)
Information Sources	**Travel Agency(43.1%)** Tv/Rad./papers(17.4%) Recommendat.(15.4%)	- - -	**Travel Agency(42.6%)** Tv/Rad./papers(17.6%) Recommendat.(15.6%)	**Travel Agency(42.6%)** Recommendat.(20.7%) Tv/Rad./papers(15.4%)	**Travel Agency(49.8%)** Recommendat.(19.8%) Tv/Rad./papers(16.7%)	**Travel Agency(47.9%)** Recommendat.(20.0%) Tv/Rad./papers(16.3%)

Appendix 105. Motivational profile of all visitors by shoulder & destination- * Bold letters and figures indicate most important segments

	ALL SHOULDER MARKET'S "MOTIVATIONAL" CHARACTERISTICS			*ALL SHOULDER MARKET'S "MOTIVATIONAL" CHARACTERISTICS*		
	1st Shoulder	2nd Shoulder	Total	Istanbul	Antalya	Total
Combined Purpose of Visit (Main&2nd Pur.)	**Holiday/Vacat(59.1%)** Business(+meet.)(24.6) Culture(+relig.) (10.3)	**Holiday/Vacat(58.7%)** Business(+meet.)(22.5) Culture(+relig.) (10.8)	**Holiday/Vacat(58.9%)** Business(+meet.)(23.6) Culture(+relig.) (10.6)	**Holiday/Vacat(44.0%)** Business(+meet.)(22.7) Culture(+relig.) (22.4)	**Holiday/Vacat(71.0%)** Culture(+relig.) (24.5) -	**Holiday/Vacat(58.9%)** Culture(+relig.) (23.6) Business(+meet.)(10.6)
Main Purpose of Visit	**Holiday/Vacat(78.4%)** Business(+meet.)(13.8) Culture(+relig.) (4.1)	**Holiday/Vacat(78.7%)** Business(+meet.)(13.0) Culture(+relig.) (3.5)	**Holiday/Vacat(78.6%)** Business(+meet.)(13.4) Culture(+relig.) (3.9)	**Holiday/Vacat(57.3%)** Business(+meet.)(29.8) Culture(+relig.) (5.2)	**Holiday/Vacat(95.2%)** Culture(+relig.) (2.8%) -	**Holiday/Vacat(78.6%)** Business(+meet.)(13.4) Culture(+relig.) (3.9%)
2nd Purpose of Visit	**Culture(+relig.)(77.0)** Holiday/Vacat(9.7%) Shop./Vis.Friend(3+3)	**Culture(+relig.)(71.8)** Shopping (9.2%) Holiday/Vacat(6.7%)	**Culture(+relig.)(74.5)** Holiday/Vacat (8.3%) Shopping (6.1%)	**Culture(+relig.)(63.6)** Holiday/Vacat (12.3%) Shopping (8.7%)	**Culture(+relig.)(84.3)** Holiday/Vacat (4.6%) Shopping (3.7%)	**Culture(+relig.)(74.5)** Holiday/Vacat (8.3%) Shopping (6.1%)
Attraction Factors	**Hist./Cult.Res (19.0%)** KnowTurkey&P.(14.5) Cheap Trav.Cost(11.6) Climate/Weather (7.7) Turkey&Hospit. (6.7)	**Hist./Cult.Res (17.9%)** **CheapTrav.Cost(17.1)** KnowTurkey&P.(14.4) Climate/Weather (9.6) Turkey&Hospit. (9.4)	**Hist./Cult.Res (18.4%)** KnowTurkey&P.(14.5) Cheap Trav.Cost(14.2) Climate/Weather (8.6) Turkey&Hospit. (8.0)	**Hist./Cult.Res (30.8%)** Busi./Conf./Meet(14.6) KnowTurkey&P.(10.5) Pop./Diff. Dest. (9.2) Recommendation (7.8)	**CheapTrav.Cost (19.4)** **KnowTurkey&P.(17.1)** Climate/Weather(12.8) Turkey&Hospit. (11.1) Hist./Cult.Res.(10.2%)	**Hist./Cult.Res (18.4%)** KnowTurkey&P.(14.5) Cheap Trav.Cost(14.2) Climate/Weather (8.6) Turkey&Hospit. (8.0)
Influential Factors on Timing of Travel	**Weather condit(23.6)** **Nothing Particul(19.0)** Consid this time(12.9) Prefer this time (12.4) My/Partner's Job (9.7)	**Nothing Particul(22.9)** **Weather condit(21.0)** **Spec/Cheapoffer(20.6)** Consid this time(8.5) Busin/Conf/Exh. (7.8)	**Weather condit(22.3)** **Nothing Particul(21.0)** Spec/cheap offer (12.8) Consid this time(10.6) Prefer this time (9.7%)	**Nothing Particul(19.3)** **My/Partner'sJob(18.3)** **Busin/Conf/Exh(17.3)** Consid this time(13.2) Spec/cheap offer (8.6)	**Weather condit(32.6)** Nothing Particul(21.0) Spec/cheap offer (12.8) Prefer this time (11.6) Consid this time (9.1)	**Weather condit(22.3)** **Nothing Particul(21.0)** Spec/cheap offer (12.8) Consid this time(10.6) Prefer this time (9.7%)
Information Sources	**Travel Agency(46.1%)** Recommendat.(20.8%) Tv/Rad./papers(14.6%)	**Travel Agency(48.0%)** Tv/Rad./papers(19.0%) Recommendat.(17.2%)	**Travel Agency(46.9%)** Recommendat.(19.2%) Tv/Rad./papers(16.6%)	**Travel Agency(42.8%)** Recommendat.(18.3%) Tv/Rad./papers(16.3%)	**Travel Agency(49.6%)** Recommendat.(19.9%) Tv/Rad./papers(16.7%)	**Travel Agency(46.9%)** Recommendat.(19.2%) Tv/Rad./papers(16.6%)

Appendix 106. Seasonal and regional preferences of visitors if free by shoulder- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "SEASONAL & SPATIAL PREFERENCE" CHARACTERISTICS IF FREE			*GERMAN MARKET'S MAIN "SEASONAL & SPATIAL PREFERENCE" CHARACTERISTICS IF FREE*		
	1st shoulder	2nd shoulder	Total shoulder season	1st shoulder	2nd shoulder	Total shoulder season
Prefered time if free	**May** (31.7%) September (19.0%) April (16.7%) June (13.5%)	**May** (22.3%) **September** (20.3%) June (14.2%) April/October (13+12)	**May** (26.6%) September (19.7%) April (14.6%) June/October (14+10)	**May** (31.2%) September (20.2%) April (15.3%) October (13.3%)	**May** (26.4%) September (16.7%) October (15.1%) April (12.7%)	**May** (28.8%) September (18.5%) October (14.2%) April (14.1%)
Seasonal Preference	**Peak Season** (79.4%) 1st Shoulder (19.0%)	**Peak Season** (75.7%) 1st Shoulder (15.5%)	**Peak Season** (77.4%) 1st Shoulder (17.2%)	**Peak Season** (75.3%) 1st Shoulder (22.0%)	**Peak Season** (67.7%) 1st Shoulder (19.7%)	**Peak Season** (71.6%) 1st Shoulder (20.9%)
Overall Reason for Seasonal Preference	**Weather** (58.4%) Quietness (13.3%) Mild Temperature(8.8) Off-Seas.Advant.(5.3)	**Weather** (51.9%) Mild Temperature(17.8) Quietness (11.9) Off-Seas.Advant.(5.2)	**Weather** (54.8%) Mild Temperature(13.7) Quietness (12.5) Off-Seas.Advant.(5.2)	**Weather** (46.0%) Mild Temperature(16.6) Quietness (8.7%) Off-Seas.Advant.(5.8)	**Weather** (43.0%) Mild Temperature(20.1) Quietness (10.1%) Natural Beauty(4.8%)	**Weather** (44.5%) Mild Temperature(18.2) Quietness (9.4%) Off-Seas.Advant.(5.1)
Reason for Prefering Peak Season(May/Oct)	(%) (%) (%) (%)	(%) (%) (%) (%)	**Weather** (55.9%) Mild Temperature(16.5) Quietness (14.6%) Off-Seas.Advant.(4.2)	(%) (%) (%) (%)	(%) (%) (%) (%)	**Weather** (44.8%) Mild Temperature(18.7) Quietness (9.5%) Off-Seas.Advant.(4.9)
Reason for Prefering 1st Shoulder(Mar/Apr)	(%) (%) (%) (%)	(%) (%) (%) (%)	**Weather** (49.1%) Mild Temperature(12.7) Quietness (10.9%) Off-Seas.Advant.(10.9)	(%) (%) (%) (%)	(%) (%) (%) (%)	**Weather** (42.9%) Mild Temperature(21.1) Quietness (11.5%) Cheapness (7.1%)
Prefered Regions if Free	**Mediterranean** (32.6) Aegean (17.4%) Marmara/B.Sea(16+14)	**Mediterranean** (28.3) Aegean (21.4%) Marmara/B.Sea(13+13)	**Mediterranean** (30.2) Aegean (19.7%) Marmara/B.Sea(14+14)	**Mediterranean** (48.9) Aegean (13.6%) Marmara/B.Sea(12+10)	**Mediterranean** (57.7) Black Sea (9.9%) Aegean/Marmara(9+9)	**Mediterranean** (52.9) Aegean (11.7%) Marmara/B.Sea(11+10)
MostPrefered Regions in Peak Season	(%) (%) (%)	(%) (%) (%)	**Mediterranean** (31.5) Aegean (18.3%) B.Sea/Marmara(14+14)	(%) (%) (%)	(%) (%) (%)	**Mediterranean** (50.3) Aegean (13.1%) Marmara/ B.Sea(12+10)
MostPrefered Regions in 1st ShoulderSeason	(%) (%) (%)	(%) (%) (%)	Medit/Aeg/Mar.(18+18+18) Cent.Anatolia (15.8%) Black Sea (13.2%)	(%) (%) (%)	(%) (%) (%)	**Mediterranean** (47.2) Black Sea (13.3%) Aegean/Marmara(12+11)
Will you visit Turkey?	**Yes** (69.2%) Perhaps (27.9%)	**Yes** (64.4%) Perhaps (28.8%)	**Yes** (66.7%) Perhaps(28.4%)	**Yes** (84.7%) Perhaps (13.8%)	**Yes** (81.5%) Perhaps (13.9%)	**Yes** (83.2%) Perhaps(13.8%)

Appendix 107. Seasonal and regional preferences of visitors if free by destination- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "SEASONAL & SPATIAL PREFERENCE" CHARACTERISTICS IF FREE			*GERMAN MARKET'S MAIN "SEASONAL & SPATIAL PREFERENCE" CHARACTERISTICS IF FREE*		
	Istanbul	Antalya	Total	Istanbul	Antalya	Total
Prefered time if free	**May** (26.5%) September (19.9%) April (14.7%) June (14.0%)	- - - -	**May** (26.6%) September (19.7%) April (14.6%) June (13.9%)	**May** (34.3%) September (20.3%) June/April (10+10%) October (7.2%)	**May** (27.1%) September (17.9%) October (16.4%) April (15.4%)	**May** (28.8%) September (18.5%) October (14.2%) April (14.1%)
Seasonal Preference	**Peak Season** (77.2%) 1st Shoulder (17.3%)	- -	**Peak Season** (77.4%) 1st Shoulder (17.2%)	**Peak Season** (79.1%) 1st Shoulder (17.6%)	**Peak Season** (69.2%) 1st Shoulder (21.9%)	**Peak Season** (71.6%) 1st Shoulder (20.9%)
Reason for Seasonal Preference	**Weather** (54.7%) Mild Temperature(13.8) Quiteness (12.6) Off-Seas.Advant.(5.3)	- - - -	**Weather** (54.8%) Mild Temperature(13.7) Quietness (12.5) Off-Seas.Advant.(5.2)	**Weather** (47.3%) Mild Temperature(14.1) Quietness (7.8) Nothing Particular(4.9)	**Weather** (43.7%) Mild Temperature(19.6) Quietness (9.9) Off-Seas.Advant.(5.3)	**Weather** (44.5%) Mild Temperature(18.2) Quietness (9.4) Off-Seas.Advant.(5.1)
Reason for Prefering Peak Season(May/Oct)	(%) (%) (%) (%)	- - - -	**Weather** (55.9%) Mild Temperature(16.5) Quietness (14.6%) Off-Seas.Advant.(4.2)	(%) (%) (%) (%)	(%) (%) (%) (%)	**Weather** (44.8%) Mild Temperature(18.7) Quietness (9.5%) Off-Seas.Advant.(4.9)
Reason for Prefering 1st Shoulder(Mar/Apr)	(%) (%) (%) (%)	- - - -	**Weather** (49.1%) Mild Temperature(12.7) Quietness (10.9%) Off-Seas.Advant.(10.9)	(%) (%) (%) (%)	(%) (%) (%) (%)	**Weather** (42.9%) Mild Temperatur(21.1) Quietness (11.5%) Cheapness (7.1%)
Prefered Regions if Free	**Mediterranean** (30.4) Aegean (19.8%) Marmara/B.Sea(15+14)	- - -	**Mediterranean** (30.2) Aegean (19.7%) Marmara/B.Sea(14+14)	**Mediterranean** (43.0) Marmara (15.0%) B. Sea/Aegean(14+12)	**Mediterranean** (56.6) Aegean (11.5%) Marmara/B.Sea(9+8)	**Mediterranean** (52.9) Aegean (11.7%) Marmara/B.Sea(11+10)
MostPrefered Regions in Peak Season	(%) (%) (%)	- - -	**Mediterranean** (31.5) Aegean (18.3%) B.Sea/Marmara(14+14)	(%) (%) (%)	(%) (%) (%)	**Mediterranean** (50.3) Aegean (13.1%) Marmara/ B.Sea(12+10)
MostPrefered Regions in 1st ShoulderSeason	(%) (%) (%)	- - -	Medit/Aeg/Mar.(18+18+18 Cent.Anatolia (15.8%) Black Sea (13.2%)	(%) (%) (%)	(%) (%) (%)	**Mediterranean** (47.2) Black Sea (13.3%) Aegean/Marmara(12+11)
Will you visit Turkey?	**Yes** (66.8%) Perhaps (28.2%)	- -	**Yes** (66.7%) Perhaps (28.4%)	**Yes** (84.4%) Perhaps (13.8%)	**Yes** (82.7%) Perhaps (13.8%)	**Yes** (83.2%) Perhaps (13.8%)

Appendix 108. Seasonal and regional preferences of visitors if free by shoulder & destination- * Bold letters and figures indicate most important segments

	ALL SHOULDER MARKET'S "SEASONAL & SPATIAL PREFERENCE" CHARACTERISTICS IF FREE			*ALL SHOULDER MARKET'S "SEASONAL & SPATIAL PREFERENCE" CHARACTERISTICS IF FREE*		
	1st Shoulder	2nd Shoulder	Total	Istanbul	Antalya	Total
Prefered time if free	**May** (31.3%) September (20.0%) April (15.6%) October (12.5%)	**May** (25.6%) September (17.4%) October (14.6%) April (12.8%)	**May** (28.4%) September (18.7%) April (14.2%) October (13.5%)	**May** (30.6%) September (20.1%) April/June (12+12%) October (8.5%)	**May** (27.1%) September (17.9%) October (16.5%) April (15.4%)	**May** (28.4%) September (18.7%) April (14.2%) October (13.5%)
Seasonal Preference	**Peak Season** (76.0%) 1st Shoulder (21.5%)	**Peak Season** (69.2%) 1st Shoulder (18.9%)	**Peak Season** (72.6%) 1st Shoulder (20.2%)	**Peak Season** (78.2%) 1st Shoulder (17.5%)	**Peak Season** (69.2%) 1st Shoulder (21.9%)	**Peak Season** (72.6%) 1st Shoulder (20.2%)
Reason for Seasonal Preference	**Weather** (48.5%) Mild Temperature(15.0) Quietness (9.7) Off-Seas.Advant.(5.7)	**Weather** (45.2%) Mild Temperature(19.5) Quietness (10.5) Off-Seas.Advant.(4.5)	**Weather** (46.9%) Mild Temperature(17.2) Quietness (10.1) Off-Seas.Advant.(5.1)	**Weather** (51.3%) Mild Temperature(13.9) Quietness (10.4) Off-Seas.Advant.(4.9)	**Weather** (43.8%) Mild Temperature(19.5) Quietness (9.8) Off-Seas.Advant.(5.3)	**Weather** (46.9%) Mild Temperature(17.2) Quietness (10.1) Off-Seas.Advant.(5.1)
Reason for Prefering Peak Season(May/Oct)	**Weather** (48.0%) Mild Temperature(16.8) Quietness (9.6%) Off-Seas.Advant.(5.9)	**Weather** (46.0%) Mild Temperature(19.8) Quietness (11.5%) Off-Seas.Advant.(3.6)	**Weather** (47.0%) Mild Temperature(18.3) Quietness (10.5%) Off-Seas.Advant.(4.8)	**Weather** (50.5%) Mild Temperature(15.8) Quietness (11.5%) Off-Seas.Advant.(4.8)	**Weather** (44.8%) Mild Temperature(19.8) Quietness (9.9%) Off-Seas.Advant.(4.8)	**Weather** (47.0%) Mild Temperature(18.3) Quietness (10.5%) Off-Seas.Advant.(4.8)
Reason for Prefering 1st Shoulder(Mar/Apr)	**Weather** (44.7%) Mild Temperature(17.4) Quietness (11.6%). Off-Se.Adv./Cheap(7+7)	**Weather** (42.8%) Mild Temperature(22.5) Quietness (11.2%) Nat.Beauty/Cheap.(8+6)	**Weather** (43.8%) Mild Temperature(19.9) Quietness (11.4%) Cheap/Off-Se.Adv.(6+6)	**Weather** (48.6%) Mild Temperature(14.3) Quietness (10.5%) Off-Seas.Advant.(7.6)	**Weather** (41.9%) Mild Temperature(22.1) Quietness (11.8%) Cheapness (7.7%)	**Weather** (43.8%) Mild Temperature(19.9) Quietness (11.4%) Cheap/Off-Se.Adv.(6+6)
Prefered Regions if Free	**Mediterranean** (45.8) Aegean (14.3%) Marmara/B.Sea(13+11)	**Mediterranean** (50.0) Aegean (12.6%) B.Sea/ Marmara(11+10)	**Mediterranean** (47.8) Aegean (13.5%) Marmara/B.Sea(12+11)	**Mediterranean** (36.5) Aegean (16.1%) Marmara/B.Sea(15+14)	**Mediterranean** (56.5) Aegean (11.5%) Marmara/B.Sea (9+9)	**Mediterranean** (47.8) Aegean (13.5%) Marmara/B.Sea(12+11)
MostPrefered Regions in Peak Season	**Mediterranean** (46.4) Aegean (15.4%) Marmara/B.Sea(13+11)	**Mediterranean** (46.7) Aegean (12.9%) Marmara/B.Sea(11+11)	**Mediterranean** (46.5) Aegean (14.2%) Marmara/B.Sea(12+11)	**Mediterranean** (37.4) Aegean (15.4%) Marmara/B.Sea(14+14)	**Mediterranean** (52.8) Aegean (13.4%) Marmara/B.Sea(10+9)	**Mediterranean** (46.5) Aegean (14.2%) Marmara/B.Sea(12+11)
MostPrefered Regions in 1st ShoulderSeason	**Mediterranean** (43.5) Marmara (14.2%) Aegean/B.Sea(12+12)	**Mediterranean** (41.5) B.Sea/Aegean(15+14) Marmara (9.2%)	**Mediterranean** (42.5) B.Sea/Aegean (13+13) Marmara (11.8%)	**Mediterranean** (26.2) Marmara (17.7%) B.Sea/Aegean(16+15)	**Mediterranean** (49.5) B.Sea/Aegean (12+12) Marmara (9.2%)	**Mediterranean** (42.5) B.Sea/Aegean (13+13) Marmara (11.8%)
Will you visit Turkey?	**Yes** (81.6%) Perhaps (16.6%)	**Yes** (77.3%) Perhaps (17.5%)	**Yes** (79.5%) Perhaps (17.1%)	**Yes** (75.7%) Perhaps (20.9%)	**Yes** (82.6%) Perhaps (14.0%)	**Yes** (79.5%) Perhaps (17.1%)

Appendix 109. Travel organisation characteristics of visitors by shoulder- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "TRAVEL ORGANISATION" CHARACTERISTICS			*GERMAN MARKET'S MAIN "TRAVEL ORGANISATION" CHARACTERISTICS*		
	1st shoulder	2nd shoulder	Total shoulder season	1st shoulder	2nd shoulder	Total shoulder season
Individual or Tour?	**Individually** (58.1%) By tour (41.9%)	**Individually** (57.7%) By tour (42.3%)	**Individually** (57.9%) By tour (42.1%)	**By tour** (81.2%) Individually (18.8%)	**By tour** (89.0%) Individually (11.0%)	**By tour** (85.2%) Individually (14.8%)
Travel Organisation	**Compl.Trav.Ag.**(56) Partly Trav.Age.(22%) Comp.by Visitor(19%)	**Compl.Trav.Ag.**(40.2) Partly Trav.Age. (27.4) Comp.by Visitor(27.4)	**Compl.Trav.Ag.**(47.5) Partly Trav.Age. (24.9) Comp.by Visitor(23.5)	**Compl.Trav.Ag.**(74.8) Partly Trav.Age. (12.4) Comp.by Visitor(9.5)	**Compl.Trav.Ag.**(82.3) Partly Trav.Age. (8.4) Comp.by Visitor(7.1)	**Compl.Trav.Ag.**(78.3) Partly Trav.Age. (10.5) Comp.byVisitor(8.4%)
Package-Tour Expenditur	**£201-£300** (50%) £101-£200 (20%) £301-£400 (16.7%)	**£101-£200** (37.8%) £201-£300 (28.9%) £1-£100 (15.6%)	**£201-£300** (37.3%) £101-£200 (30.7%) £1-100/301-400(12+11)	**£301-£400** (31.3%) £201-£300 (29.2%) £101-200/501-1000 (14+13)	**£101-£200** (72.2%) £301-£400 (12.7%) £201-£300 (9.7%)	**£101-£200** (42.9%) £301-£400 (22.1%) £201-£300 (19.6%)
Travel Booking Time	**5-8 weeks ago**(28.1%) 3-4 weeks ago (18.0%) 0-1 wk.,2weeks(17+17)	**2 weeks ago** (29.9%) **3-4 weeks ago**(29.0%) 5-8 weeks ago (16.8%)	**2 & 3-4 weeks** (24+24) **5-8 weeks ago**(21.9%) 1 wk. or less (15.3%)	**1 wk. or less** (28.9%) 2 weeks ago (23.5%) 3-4 weeks ago (23.0%)	**3-4 weeks ago**(28.7%) **5-8 weeks ago**(26.7%) 1 wk. or less (19.2%)	**3-4 weeks ago**(25.7%) **1 wk. or less** (24.4%) 2 & 5-8 wks. (20+20)
Companion	**Husb. & Wife** (34.5%) Alone (29.1) Fri. &Relatives(14.5%) Colleagues (10%)	**Alone** (32.8%) Husb. & Wife (30.4%) Fri. &Relatives(12.8%) Partner/B-G.Fri. (10.4)	**Husb. & Wife**(32.3%) Alone (31.1%) Fri. &Relatives(13.6%) Colleagues (8.5%)	**Husb. & Wife**(34.5%) Fri. &Relatives(22.9%) Alone (14.1%) Partner/B-G.Fri. (10.9)	**Husb. & Wife**(39.9%) Fri. &Relatives(20.9%) Partner/B-G.Fri. (13.3) Alone (13.1%)	**Husb. & Wife**(37.0%) Fri. &Relatives(22.0%) Alone (13.6%) Partner/B-G.Fri. (12.0)
Number of companion	**1** (90.0%) **3** (4.3%), **2** (2.9%)	**1** (81.0%) **3** (7.6%), **2** (7.6%)	**1** (85.2%) **3** (6.0%), **2** (5.4%)	**1** (77.4%) **2** (10.6%), **3** (5.6%)	**1** (77.0%) **2** (11.7%), **3** (4.7%)	**1** (77.2%) **2** (11.1%), **3** (5.2%)
Is this 2nd holiday?	**No** (56.2%) Yes (43.8%)	**Yes** (65.6%) No (34.4%)	**Yes** (54.9%) No (45.1%)	**No** (75.0%) Yes (25.0%)	**Yes** (77.9%) No (22.1%)	**No** (50.7%) **Yes** (49.3%)
Visitor take 2nd Holiday	**Yes** (82.8%) No (17.2%)	**Yes** (80.0%) No (20.0%)	**Yes** (81.3%) No (18.7%)	**Yes** (85.3%) No (14.7%)	**Yes** (81.5%) No (18.5%)	**Yes** (83.6%) No (16.4%)

Appendix 110. Travel organisation characteristics of visitors by destination- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "TRAVEL ORGANISATION" CHARACTERISTICS			*GERMAN MARKET'S MAIN "TRAVEL ORGANISATION" CHARACTERISTICS*		
	Istanbul	Antalya	Total	Istanbul	Antalya	Total
Individual or Tour?	**Individually** (58.3%) By tour (41.7%)	- -	**Individually** (57.9%) By tour (42.1%)	**By tour** (61.3%) Individually (38.7%)	**By tour** (94.3%) Individually (5.7%)	**By tour** (85.2%) Individually (14.8%)
Travel Organisation	**Compl.Trav.Ag.**(47.2) Partly Trav.Age. (25.2) Comp.by Visitor(23.4)	- - -	**Compl.Trav.Ag.**(47.5) Partly Trav.Age. (24.9) Comp.by Visitor(23.5)	**Compl.Trav.Ag.**(58) Comp.by Visitor(18.6) Partly Trav.Age. (16.8)	**Compl.Trav.Ag.**(86.5) Partly Trav.Age. (8%) Comp.byVisitor(4.3%)	**Compl.Trav.Ag.**(78.3) Partly Trav.Age. (10.5) Comp.byVisitor(8.4%)
Package-Tour Expenditur	**£201-£300** (38.4%) £101-£200 (31.5%) £1-100/301-400 (12+10)	- - -	**£201-£300** (37.3%) £101-£200 (30.7%) £1-100/301-400 (12+11)	**£101-£200** (61.0%) £201-£300 (18.0%) £301-£400 (10.0%)	**£101-£200** (38.2%) £301-£400 (25.3%) £201-£300 (20.0%)	**£101-£200** (42.9%) £301-£400 (22.1%) £201-£300 (19.6%)
Travel Booking Time	**2 weeks ago** (24.4%) **3-4 weeks ago** (23.8%) **5-8 weeks ago**(21.8%)	- - -	**2 weeks ago** (24.0%) **3-4 weeks ago** (24.0%) **5-8 weeks ago**(21.9%)	**3-4 weeks ago** (27.2%) **5-8 weeks ago**(22.8%) 1 wk or less (22.3%)	**0-1 & 3-4 wks** (25+25) 2 weeks ago (20.9%) 5-8 weeks ago (18.2%)	**3-4 weeks ago** (25.7%) 1 wk or less (24.4%) 2 & 5-8 wks (20+19%)
Companion	**Husb. & Wife** (32.5%) Alone (30.3) Fri. &Relatives(13.9%) Colleagues (8.7%)	- - - -	**Husb. & Wife**(32.3%) Alone (31.1%) Fri. &Relatives(13.6%) Colleagues (8.5%)	**Husb. & Wife**(29.6%) Alone (25.2%) Fri. &Relatives(23.2%) Colleagues (7.6%)	**Husb. & Wife**(40.0%) Fri. &Relatives(21.5%) Partner/B-G.Fri. (14.9) Alone (9.0%)	**Husb. & Wife**(37.0%) Fri. &Relatives(22.0%) Alone (13.6%) Partner/B-G.Fri. (12.0)
Number of companion	**1** (85.1%) 3 (6.1%), 2 (5.4%)	- -	**1** (85.2%) 3 (6.0%), 2 (5.4%)	**1** (69.5%) 2 (14.0%), 3 (4.9)	**1** (79.6%) 2 (10.2%), 3 (5.3%)	**1** (77.2%) 2 (11.1%), 3 (5.2)
Is this 2nd holiday?	**Yes** (54.7%) No (45.3%)	- -	**Yes** (54.9%) No (45.1%)	**No** (51.9%) Yes (48.1%)	**No** (50.3%) Yes (49.7%)	**No** (50.7%) Yes (49.3%)
Visitor take 2nd Holiday	**Yes** (81.1%) No (18.9%)	- -	**Yes** (81.3%) No (18.7%)	**Yes** (83.0%) No (17.0%)	**Yes** (83.8%) No (16.2%)	**Yes** (83.6%) No (16.4%)

Appendix 111. Travel organisation characteristics of all visitors by shoulder & destination- * Bold letters and figures indicate most important segments

	ALL SHOULDER MARKET'S "TRAVEL ORGANISATION" CHARACTERISTICS			*ALL SHOULDER MARKET'S "TRAVEL ORGANISATION" CHARACTERISTICS*		
	1st Shoulder	2nd Shoulder	Total	Istanbul	Antalya	Total
Individual or Tour?	**By tour (73.6%)** Individually (26.4%)	**By tour (77.5%)** Individually (22.5%)	**By tour (75.7%)** Individually (24.3%)	**By tour (51.4%)** Individually (48.6%)	**By tour (94.1%)** Individually (5.9%)	**By tour (75.7%)** Individually (24.3%)
Travel Organisation	**Compl.Trav.Ag.(71.2)** Partly Trav.Age. (14.2) Comp.by Visitor(11.3)	**Compl.Trav.Ag.(72.2)** Partly Trav.Age.(13%) Comp.by Visitor(12%)	**Compl.Trav.Ag.(71.7)** Partly Trav.Age. (13.6) Comp.by Visitor(11.6)	**Compl.Trav.Ag.(52.7)** Partly Trav.Age. (20.9) Comp.by Visitor(20.9)	**Compl.Trav.Ag.(86.4)** Partly Trav.Age. (8%) Comp.byVisitor(4.4%)	**Compl.Trav.Ag.(71.7)** Partly Trav.Age. (13.6) Comp.by Visitor(11.6)
Package-Tour Expenditur	**£201-£300 (31.5%)** £301-£400 (29.7%) £101-£200 (15.0%)	**£101-£200 (66.7%)** £201-£300 (12.8%) £301-£400 (11.7%)	**£101-£200 (41.3%)** £201-£300 (22.0%) 301-£400 (20.5%)	**£101-£200 (48.6%)** £201-£300 (26.6%) 301-£400 (9.8%)	**£101-£200 (38.0%)** £301-£400 (25.4%) £201-£300 (19.9%)	**£101-£200 (41.3%)** £201-£300 (22.0%) 301-£400 (20.5%)
Travel Booking Time	**1 wk. or less (26.8%)** 2 weeks ago (22.3%) 3-4 weeks ago (21.1)	**3-4 weeks ago(28.8%)** 5-8 weeks ago (24.5%) 2 & 1wk. orless(19+18)	**3-4 weeks ago (25.3%)** **1 wk. or less (22.5%)** 2 & 5-8 wks. (21+20)	**3-4 weeks ago (25.6%)** 5-8 weeks ago (22.3%) 2 & 0-1 wks (21+19%)	**3-4 & 0-1 wks (25+25)** 2 weeks ago (20.7%) 5-8 weeks ago (18.3%)	**3-4 weeks ago (25.3%)** **1 wk. or less (22.5%)** 2 & 5-8 wks. (21+20)
Companion	**Husb. & Wife (32.3%)** Alone (31.1%) Fri. &Relatives(13.6%) Colleagues (8.5%)	**Husb. & Wife(37.0%)** Fri. &Relatives(22.0%) Alone (13.6%) Partner/B-G.Fri. (12.0)	**Husb. & Wife(36.0%)** Fri. &Relatives(20.2%) Alone (17.3%) Partner/B-G.Fri. (10.9)	**Husb. & Wife(31.0%)** Alone (27.7%) Fri. &Relatives(18.7%) Colleagues (8.1%)	**Husb. & Wife(39.9%)** Fri. &Relatives(21.4%) Partner/B-G.Fri. (14.8) Alone (9.4%)	**Husb. & Wife(36.0%)** Fri. &Relatives(20.2%) Alone (17.3%) Partner/B-G.Fri. (10.9)
Number of companion	**1 (79.4%)** 2 (9.3%), 3 (5.4%)	**1 (77.8%)** 2 (10.9%). 3 (5.3%)	**1 (78.6%)** 2 (10.1%), 3 (5.3%)	**1 (76.9%)** 2 (9.9%), 3 (5.4%)	**1 (79.7%)** 2 (10.2%), 3 (5.3%)	**1 (78.6%)** 2 (10.1%), 3 (5.3%)
Is this 2nd holiday?	**No (71.3%)** Yes (28.7%)	**Yes (75.1%)** No (24.9%)	**Yes (50.5%)** **No (49.5%)**	**Yes (51.4%)** **No (48.6%)**	**No (50.2%)** **Yes (49.8%)**	**Yes (50.5%)** **No (49.5%)**
Visitor take 2nd Holiday	**Yes (84.8%)** No (15.2%)	**Yes (81.2%)** No (18.8%)	**Yes (83.1%)** No (16.9%)	**Yes (82.1%)** No (17.9%)	**Yes (83.9%)** No (16.1%)	**Yes (83.1%)** No (16.9%)

Appendix 112. Preferential characteristics of visitors while in Turkey by shoulder- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "PREFERENTIAL" CHARACTARISTICS			*GERMAN MARKET'S MAIN "PREFERENTIAL" CHARACTARISTICS*		
	1st shoulder	2nd shoulder	Total shoulder season	1st shoulder	2nd shoulder	Total shoulder season
Length of Stay	**3-5 nights** (59.4%) 6-7 nights (17.0%) 1-2 nights (10.4%)	**3-5 nights** (59.3%) 6-7 nights (9.8%) 11-14 nights (9.8%)	**3-5 nights** (59.4%) 6-7 nights (13.1%) 1-2 / 11-14 n. (8.7+8.7)	**6-7 nights** (37.0%) 11-14 nights (28.3%) 3-5 nights (17.9%)	**6-7 nights** (56.8%) 3-5 nights (18.9%) 11-14 nights (14.7%)	**6-7 nights** (46.2%) 11-14 nights (22.0%) 3-5 nights (18.4%)
No of Provinces Visited	**Only destina.** (88.2%) One other prov. (6.9%) -	**Only destina.** (82.8%) One other prov.(13.1%) -	**Only destina.** (85.3%) One other prov.(10.3%) -	**Only destina.** (78.7%) One other prov.(10.6%) 3 or more prov. (8.1%)	**Only destina.** (83.1%) One other prov.(14.3%) -	**Only destina.** (80.8%) One other prov.(12.3%) 3 or more prov. (5.4%)
Most Visited Regions	**Marmara** (81.7%) Aegean (6.7%) Cent.Anatolia (6.7%)	**Marmara** (71.5%) Cent.Anatolia (12.6%) Mediterranean (7.3%)	**Marmara** (76.0%) Cent.Anatolia (10.0%) Aegean (5.9%)	**Mediterranean** (50.2%) Marmara (26.5%) Aegean (16.0%)	**Mediterranean** (59.3%) Marmara (24.8%) Aegean (14.0%)	**Mediterranean** (54.0%) Marmara (25.8%) Aegean (15.2%)
No of Nights Spent outside actual destinatio	**1-2 nights** (33.3%) 3-5 nights (30.3%) 6-7 nights (6.1%)	**3-5 nights** (33.3%) 1-2 nights (23.1%) 11-14 nights (12.8%)	**3-5 nights** (31.9%) 1-2 nights (27.8%) 6-7, 11-14 n. (8.3+8.3%)	**1-2 nights** (61.3%) 3-5 nights (4.6%) -	**1-2 nights** (46.2%) 6-7 nights (4.8%) -	**1-2 nights** (56.4%) 3-5 nights (4.0%) -
Accommodation Choice	**Hotel** (80.4%) Friend&Rel.Home(12.1)	**Hotel** (80.0%) Friend&Rel.Home(13.1)	**Hotel** (80.2%) Friend&Rel.Home(12.7)	**Hotel** (89.8%) Friend&Rel.Home (3.1)	**Hotel** (93.3%) Holiday Village (1.8%)	**Hotel** (91.4%) Friend&Rel.Home (2.3)
Participated Activities	**Sightseeing** (24.5%) Excursion (17.3%) Business/work (16.5%) Dining-out (9.4)	**Sightseeing** (23.4%) Excursion (15.9%) Business/work (15.4%) Visit.Other cities (8.4)	**Sightseeing** (23.8%) Excursion (16.4%) Business/work (15.9%) Vis.Museum/Monu(6.5)	**Excursion** (38.0%) Sightseeing (13.8%) Visit.Other cities (8.5) Various Sports (6.6%)	**Excursion** (39.5%) Sightseeing (12.6%) Visit.Other cities(10.1) Shopping (8.6%)	**Excursion** (38.7%) Sightseeing (13.2%) Visit.Other cities (9.3) Shopping (7.0%)
Impressions (Facilities)	**Good/V.Good** (47.2%) Average (20.7%)	**Good/V.Good** (41.3%) Average (23.6%)	**Good/V.Good** (44.0%) Average (22.3%)	**Good/V.Good** (57.4%) Average (19.3%)	**Good/V.Good** (57.9%) Average (19.4%)	**Good/V.Good** (57.6%) Average (19.3%)
Impressions (Staff&Pe.)	**Good/V.Good** (61.0%) Average (17.2%)	**Good/V.Good** (56.8%) Average (15.8%)	**Good/V.Good** (58.8%) Average (16.5%)	**Good/V.Good** (72.3%) Average (15.5%)	**Good/V.Good** (75.9%) Average (15.1%)	**Good/V.Good** (74.0%) Average (15.3%)
Expenditure in Turkey	**£1-£250** (41.0%) **£251-£500** (37.7%) £501-£750 (11.5%)	**£1-£250** (41.4%) £251-£500 (32.9%) £501-£750 (11.4%)	**£1-£250** (41.2%) £251-£500 (35.1%) £501-£750 (11.5%)	**£251-£500** (30.7%) £1001-£2500 (23.4%) £751-1000/501-750(18+17)	**£251-£500** (41.2%) £1-£250 (18.3%) £501-750/1001-2500(17+15)	**£251-£500** (35.0%) £1001-£2500 (19.9%) £501-£750 (17.0%)
Visitors' Comments	**Negative** (47.0%) Positive (27.4%) Advice (25.6%)	**Negative** (39.3%) **Positive** (37.5%) Advice (23.2%)	**Negative** (42.0%) Positive (34.0%) Advice (24.0%)	**Positive** (45.9%) Negative (42.9%) Advice (11.2%)	**Positive** (58.4%) Negative (28.0%) Advice (13.6%)	**Positive** (52.3%) Negative (35.3%) Advice (12.4%)

Appendix 113. Preferential characteristics of visitors while in Turkey by destination- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "PREFERENTIAL" CHARACTARISTICS			*GERMAN MARKET'S MAIN "PREFERENTIAL" CHARACTARISTICS*		
	Istanbul	Antalya	Total	Istanbul	Antalya	Total
Length of Stay	**3-5 nights** (60.4%) 6-7 nights (12.9%) 1-2 nights (8.9%)	- - -	**3-5 nights** (59.4%) 6-7 nights (13.1%) 1-2 nights (8.7%)	**3-5 nights** (59.3%) 6-7 nights (12.7%) 1-2 nights (10.2%)	**6-7 nights** (59.7%) 11-14 nights (28.7%) 8-10 nights (5.0%)	**6-7 nights** (46.2%) 11-14 nights (22.0%) 3-5 nights (18.4%)
No of Provinces Visited	**Only destina.** (85.5%) One more prov.(10.5%) -	- - -	**Only destina.** (85.3%) One more prov.(10.3%) -	**Only destina.** (81.4%) One more prov.(10.0%) 3 or more prov. (6.9%)	**Only destina.** (80.5%) One more prov.(13.3%) 3 or more prov. (4.9%)	**Only destina.** (80.8%) One more prov.(12.3%) 3 or more prov. (5.4%)
Most Visited Regions	**Marmara** (78.0%) Cent.Anatolia (9.8%) Aegean (5.3%)	- - -	**Marmara** (76.0%) Cent.Anatolia (10.0%) Aegean (5.9%)	**Marmara** (70.9%) Aegean (13.6%) Cent.Anatolia (7.3%)	**Mediterranean**(73.7%) Aegean (15.8%) Marmara (7.6%)	**Mediterranean**(54.0%) Marmara (25.8%) Aegean (15.2%)
No of Nights Spent outside actual destinatio	**3-5 nights** (31.9%) 1-2 nights (27.5%) 11-14 nights (8.7%)	- - -	**3-5 nights** (31.9%) 1-2 nights (27.8%) 11-14 nights (8.3%)	**1-2 nights** (48.7%) 3-5 nights (9.4%) 8-10, 15-21 (4.3+4.3)	**1-2 nights** (60.8%) 11-14 nights (2.9%) -	**1-2 nights** (56.4%) 3-5 nights (4.0%) 11-14 nights (3.1%)
Accommodation Choice	**Hotel** (80.7%) Friend&Rel.Home(12.4)	- -	**Hotel** (80.2%) Friend&Rel.Home(12.7)	**Hotel** (88.4%) Friend&Rel.Home(4.0)	**Hotel** (92.7%) Holiday Village (2.6%)	**Hotel** (91.4%) Friend&Rel.Home(2.3)
Participated Activities	**Sightseeing** (23.8%) Excursion (16.5%) Business/work (16.2%) Vis.Museum/Monu(6.7)	- - - -	**Sightseeing** (23.8%) Excursion (16.4%) Business/work (15.9%) Vis.Museum/Monu(6.5)	**Sightseeing** (26.2%) Excursion (23.0%) Business/work (14.6%) Shopping (9.6%)	**Excursion** (44.3%) Visit.Other cities(11.2) Sightseeing (8.6%) Various Sports (7.6%)	**Excursion** (38.7%) Sightseeing (13.2%) Visit.Other cities (9.3) Shopping (7.0%)
Impressions (Facilities)	**Good/V.Good** (44.0%) Average (22.5%)	- -	**Good/V.Good** (44.0%) Average (22.3%)	**Good/V.Good** (46.9%) Average (25.5%)	**Good/V.Good** (61.8%) Average (16.9%)	**Good/V.Good** (57.6%) Average (19.3%)
Impressions (Staff&Pe.)	**Good/V.Good** (58.7%) Average (16.6%)	- -	**Good/V.Good** (58.8%) Average (16.5%)	**Good/V.Good** (63.2%) Average (20.4%)	**Good/V.Good** (78.2%) Average (13.3%)	**Good/V.Good** (74.0%) Average (15.3%)
Expenditure in Turkey	**£1-£250** (41.9%) £251-£500 (34.9%) £501-750 (10.9%)	- - -	**£1-£250** (41.2%) £251-£500 (35.1%) £501-750 (11.5%)	**£251-£500** (36.5%) £1-£250 (20.4%) £1001-£2500 (19.7%)	**£251-£500** (34.2%) £1001-£2500 (20.1%) £501-750/751-10000(18+18)	**£251-£500** (35.0%) £1001-£2500 (19.9%) £501-£750 (17.0%)
Visitors' Comments	**Negative** (41.6%) Positive (34.4%) Advice (24.0%)	- - -	**Negative** (42.0%) Positive (34.0%) Advice (24.0%)	**Negative** (44.2%) Positive (40.0%) Advice (15.8%)	**Positive** (55.7%) Negative (32.8%) Advice (11.5%)	**Positive** (52.3%) Negative (35.3%) Advice (12.4%)

Appendix 114. Preferential characteristics of visitors while in Turkey by shoulder & destination- * Bold letters and figures indicate most important segments

	ALL SHOULDER MARKET'S "PREFERENTIAL" CHARACTERISTICS			*ALL SHOULDER MARKET'S "PREFERENTIAL" CHARACTERISTICS*		
	1st Shoulder	**2nd Shoulder**	**Total**	**Istanbul**	**Antalya**	**Total**
Length of Stay	**6-7 nights** (33.1%) 3-5 nights (26.0%) 11-14 nights (24.3%)	**6-7 nights** (45.3%) 3-5 nights (28.8%) 11-14 nights (13.5%)	**6-7 nights** (39.0%) 3-5 nights (27.3%) 11-14 nights (19.1%)	**3-5 nights** (59.9%) 6-7 nights (12.8%) 1-2 nights (9.5%)	**6-7 nights** (59.4%) 11-14 nights (28.7%) 8-10 nights (5.1%)	**6-7 nights** (39.0%) 3-5 nights (27.3%) 11-14 nights (19.1%)
No of Provinces Visited	**Only destina.** (80.5%) One more prov. (9.9%) 3 or more prov. (7.2%)	**Only destina.** (83.0%) One more prov.(14.0%) -	**Only destina.** (81.7%) One more prov.(11.9%) 3 or more prov. (4.8%)	**Only destina.** (83.4%) One more prov.(10.2%) 3 or more prov. (4.4%)	**Only destina.** (80.5%) One more prov.(13.2%) 3 or more prov. (5.0%)	**Only destina.** (81.7%) One more prov.(11.9%) 3 or more prov. (4.8%)
Most Visited Regions	**Mediterranean** (42.9%) Marmara (34.9%) Aegean (14.5%)	**Mediterranean** (46.9%) Marmara (35.9%) Aegean (12.0%)	**Mediterranean** (44.7%) Marmara (35.4%) Aegean (13.4%)	**Marmara** (74.1%) Aegean (9.9%) Cent.Anatolia (8.4%)	**Mediterranean** (73.6%) Aegean (15.9%) Marmara (7.5%)	**Mediterranean** (44.7%) Marmara (35.4%) Aegean (13.4%)
No of Nights Spent outside actual destinatio	**1-2 nights** (57.6%) 3-5 nights (8.0%) 11-14 nights (3.2%)	**1-2 nights** (39.9%) 3-5 nights (11.2%) 6-7 nights (6.3%)	**1-2 nights** (51.1%) 3-5 nights (9.2%) 11-14 nights (4.1%)	**1-2 nights** (40.9%) 3-5 nights (17.7%) 11-14 nights (5.4%)	**1-2 nights** (60.4%) 11-14 nights (2.9%) -	**1-2 nights** (51.1%) 3-5 nights (9.2%) 11-14 nights (4.1%)
Accommodation Choice	**Hotel** (88.0%) Friend&Rel.Home(4.8)	**Hotel** (89.9%) Friend&Rel.Home (4.3)	**Hotel** (88.9%) Friend&Rel.Home (4.6)	**Hotel** (84.7%) Friend&Rel.Home (8.1)	**Hotel** (92.4%) Holiday Village (2.5%)	**Hotel** (88.9%) Friend&Rel.Home (4.6)
Participated Activities	**Excursion** (34.5%) Sightseeing (15.6%) Visit.Other cities (7.2) Business/work (6.2%)	**Excursion** (33.5%) Sightseeing (15.4%) Visit.Other cities (9.7) Shopping (8.1%)	**Excursion** (34.0%) Sightseeing (15.5%) Visit.Other cities (8.4) Shopp./Busin(6.7+6.5)	Sightseeing (25.0%) Excursion (19.8%) Business/work (15.4%) Shopping (7.7%)	Excursion (44.0%) Visit.Other cities(11.1) Sightseeing (8.7%) Various Sports (7.7%)	**Excursion** (34.0%) Sightseeing (15.5%) Visit.Other cities (8.4) Shopp./Busin(6.7+6.5)
Impressions (Facilities)	**Good/V.Good** (55.3%) Average (19.6%)	**Good/V.Good** (53.8%) Average (20.4%)	**Good/V.Good** (54.6%) Average (20.0%)	**Good/V.Good** (45.5%) Average (24.0%)	**Good/V.Good** (61.7%) Average (16.9%)	**Good/V.Good** (54.6%) Average (20.0%)
Impressions (Staff&Pe.)	**Good/V.Good** (69.8%) Average (15.9%)	**Good/V.Good** (70.7%) Average (15.3%)	**Good/V.Good** (70.2%) Average (15.6%)	**Good/V.Good** (60.8%) Average (18.4%)	**Good/V.Good** (78.1%) Average (13.2%)	**Good/V.Good** (70.2%) Average (15.6%)
Expenditure in Turkey	**£251-£500** (32.3%) £1001-£2500 (18.3%) £1-250 (16.5%)	**£251-£500** (38.6%) £1-£250 (25.6%) £501-£750 (15.2%)	**£251-£500** (35.1%) £1-£250 (20.5%) £501-750/1001-2500(15+15)	**£251-£500** (35.7%) £1-£250 (30.8%) £501-£750 (12.8%)	**£251-£500** (34.3%) £1001-£2500 (19.9%) £501-750/1001-2500(19+18)	**£251-£500** (35.1%) £1-£250 (20.5%) £501-750/1001-2500(15+15)
Visitors' Comments	**Negative** (44.4%) Positive (39.1%) Advice (16.5%)	**Positive** (47.7%) Negative (33.8%) Advice (18.5%)	**Positive** (44.1%) Negative (38.3%) Advice (17.6%)	**Negative** (42.0%) Positive (35.8%) Advice (22.2%)	**Positive** (55.1%) Negative (33.3%) Advice (11.6%)	**Positive** (44.1%) Negative (38.3%) Advice (17.6%)

Appendix 115. Past Travel characteristics of visitors by shoulder- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "PAST TRAVEL" CHARACTARISTICS			*GERMAN MARKET'S MAIN "PAST TRAVEL" CHARACTARISTICS*		
	1st shoulder	2nd shoulder	Total shoulder season	1st shoulder	2nd shoulder	Total shoulder season
Repeat or1st timeVisit	**First time** (58.3%) Repeat (41.7%)	**Repeat** (50.8%) **First time** (49.2%)	**First time** (53.4%) Repeat (46.6%)	**First time** (56.1%) Repeat (43.9%)	**First time** (56.7%) Repeat (43.3%)	**First time** (56.4%) Repeat (43.6%)
Year of Last Visit	(%) (%) (%)	(%) (%) (%)	**This year** (39.2%) 1 year ago (27.8%) 5-10 years ago (13.4)	(%) (%) (%)	(%) (%) (%)	**1 year ago** (30.4%) 2-4 years ago (27.1%) **This year** (20.5%)
Purpose of Last Visit	(%) (%) (%)	(%) (%) (%)	**Busin./Conf/Meet**(37.8) **Holiday/Vacat**(36.7%) Vis.Friends&R.(11.2)	(%) (%) (%)	(%) (%) (%)	**Holiday/Vacat**(72.0%) Busin./Conf/Meet(11.5) Cultural (5.1%)
Influential Factor on Time of Last Visit	(%) (%) (%) (%) (%)	(%) (%) (%) (%) (%)	**Busin./Conf/Meet**(31.5) Weather (16.7%) My/Partner's job(13%) Nothing Particul.(11.1) Prefer This Time(9.3%)	(%) (%) (%) (%) (%)	(%) (%) (%) (%) (%)	**Weather** (28.9%) Consid This Time(19.1) Nothing Particul.(16%) Prefer This Time(10.6) Busin./Conf/Meet (7.5)

Appendix 116. Past Travel characteristics of visitors by destination- * Bold letters and figures indicate most important segments

	BRITISH MARKET'S MAIN "PAST TRAVEL" CHARACTARISTICS			*GERMAN MARKET'S MAIN "PAST TRAVEL" CHARACTARISTICS*		
	Istanbul	Antalya	Total	Istanbul	Antalya	Total
Repeat or1st timeVisit	**First time (53.4%)** Repeat (46.6%)	- -	**First time (53.4%)** Repeat (46.6%)	**Repeat (52.0%)** First time (48.0%)	**First time (59.8%)** Repeat (40.2%)	**First time (56.4%)** Repeat (43.6%)
Year of Last Visit	(%) (%) (%)	- - -	**This year (39.2%)** 1 year ago (27.8%) 5-10 years ago (13.4)	(%) (%) (%)	(%) (%) (%)	**1 year ago (30.4%)** 2-4 years ago (27.1%) **This year (20.5%)**
Purpose of Last Visit	(%) (%) (%)	- - -	**Busin./Conf/Meet(37.8)** **Holiday/Vacat(36.7%)** Vis.Friends&R.(11.2)	(%) (%) (%)	(%) (%) (%)	**Holiday/Vacat(72.0%)** Busin./Conf/Meet(11.5) Cultural (5.1%)
Influential Factor on Time of Last Visit	(%) (%) (%) (%) (%)	- - - - -	**Busin./Conf/Meet(31.5)** Weather (16.7%) My/Partner's job(13%) Nothing Particul.(11.1) Prefer This Time(9.3%)	(%) (%) (%) (%) (%)	(%) (%) (%) (%) (%)	**Weather (28.9%)** Consid This Time(19.1) Nothing Particul.(16%) Prefer This Time(10.6) Busin./Conf/Meet (7.5)

Appendix 117. Past Travel characteristics of all visitors by shoulder & destination- * Bold letters and figures indicate most important segments

	ALL SHOULDER MARKET'S "PAST TRAVEL" CHARACTERISTICS			*ALL SHOULDER MARKET'S "PAST TRAVEL" CHARACTERISTICS*		
	1st Shoulder	2nd Shoulder	Total	Istanbul	Antalya	Total
Repeat or1st timeVisit	**First time (56.5%)** Repeat (43.5%)	**First time (54.9%)** Repeat (45.1%)	**First time (55.7%)** Repeat (44.3%)	**First time (50.7%)** **Repeat (49.3%)**	**First time (59.8%)** Repeat (40.2%)	**First time (55.7%)** Repeat (44.3%)
Year of Last Visit	**1 year ago (42.1%)** 2-4 years ago (28.7%) 5-10yrs/this year(12+12)	**This year (38.0%)** 2-4 years ago (18.3%) 1 year ago (17.4%)	**1 year ago (29.8%)** This year (24.7%) 2-4 years ago (23.5)	**This year (34.9%)** 1 year ago (31.6%) 2-4 years ago (14.6%)	**2-4 years ago (32.3%)** 1 year ago (28.1%) 5-10 years ago (16.6%)	**1 year ago (29.8%)** This year (24.7%) 2-4 years ago (23.5)
Purpose of Last Visit	**Holiday/Vacat(61.9%)** Busin./Conf/Meet(18.8) Cultur./VFR (5+5%)	**Holiday/Vacat(65.2%)** Busin./Conf/Meet(16.7) Vis.Friends&R.(7.6%)	**Holiday/Vacat(63.6%)** Busin./Conf/Meet(17.7) Vis.Friends&R.(6.3%)	**Holiday/Vacat(42.2%)** Busin./Conf/Meet(33.0) Vis.Friends&R.(8.7%)	**Holiday/Vacat(85.0%)** Cultural (4.9%) Vis.Friends&R.(3.9%)	**Holiday/Vacat(63.6%)** Busin./Conf/Meet(17.7) Vis.Friends&R.(6.3%)
Influential Factor on Time of Last Visit	**Weather (26.1%)** Consid.This Time(18.2) Nothing Particul.(14.2) Prefer This Time(11.9) Busin./Conf/Meet(11.5)	**Weather (26.4%)** Nothing Particul.(15.7) Busin./Conf/Meet(14.0) Consid.This Time(12.8) Prefer This Time(8.7%)	**Weather (26.3%)** Consid.This Time(15.6) Nothing Particul.(14.9) Busin./Conf/Meet(12.7) Prefer This Time(10.3)	**Busin./Conf/Meet(25.7)** Weather (18.1%) My/Partner's job(12.7) Nothing Particul.(11.4) Consid.This Time (11.0)	**Weather (33.7%)** Consid.This Time (19.8) Nothing Particul.(18.2) Prefer This Time(11.6) School Holidays(6.6%)	**Weather (26.3%)** Consid.This Time(15.6) Nothing Particul.(14.9) Busin./Conf/Meet(12.7) Prefer This Time(10.3)

TURKISH MINISTRY OF NATIONAL EDUCATION AND
BOURNEMOUTH UNIVERSITY, ENGLAND
OFF-SEASON VISITOR SURVEY

This questionnaire should be completed by only British and German visitors.

Good morning/afternoon/evening. We are undertaking a survey in different parts of Turkey to find out the characteristics and preferences of off-season British and German visitors.

We would be very grateful if you would spare few minutes of your valuable time and fill in this questionnaire.

The information you will give will be pooled with others and will be confidential. No information given will be used for any other purposes.

Please tick only one response to each question (unless otherwise stated) and return the questionnaire to the interviewer after completion.

Many thanks for your co-operation.

1- What is your nationality?

O British O German O Other

(If **Other**, please return the questionnaire to the interviewer and **THANK YOU**)

1-A Would you mind answering some questions about your visit to Turkey?

O Yes (If **Yes**, please return the questionnaire to the interviewer and **THANK YOU**)

O No

PART 1 ABOUT YOU AND YOUR FAMILY

2- Sex: O Male O Female

3- What is your country of residence? _____

4- Which letter below best describes your age?

O A 0 - 15
O B 16 - 24
O C 25 - 34
O D 35 - 44
O E 45 - 54
O F 55 - 64
O G 65 and over

5- What is your employment status?

O Employer
O Self-employed
O Manual worker
O Office worker
O Unemployed
O Student
O Retired
O Housewife
O None

6- What is the highest level of education that you achieved?

O Elementary/Primary
O Secondary/High School
O College/University
O Postgraduate
O None

7- In which category does your family income last year fit best?

O Under £ 5000 per annum
O Between £ 5,000 - 10,000
O Between £ 11,000 - 15,000
O Between £ 16,000 - 20,000
O Between £ 21,000 - 30,000
O Over £ 30,000 per annum

8- What is your family status?

O Single *(Go to Question 10)*
O Couple
O Married
O Divorced/Separated
O Widowed
O Single Parent

9- Have you any children living at home with you?

O No *(Go to next question 10)*

O If Yes: Number of children

_____Aged 12 years or younger at home
_____13-16 years at home
_____17-20 years at home
_____21 years or older at home

PLEASE GO TO NEXT PAGE

10- Who are you travelling with?

O Alone *(Go to Question 12)*

O Accompanied by

- ☐ Husband & Wife & Children
- ☐ Husband & wife
- ☐ Children
- ☐ Other (Please specify) _____
- ☐ Parents
- ☐ Colleagues
- ☐ Friends & Relatives

11- Could you look at the table below and tell us what is your companion(s) age and sex, and occupation? (PLEASE DO NOT INCLUDE yourself but LIST all those whose expenses were covered from your budget)

COMPANION	*AGE*	*SEX*		*OCCUPATION*
First	_____	O Male	O Female	_____
Second		O M	O F	_____
Third	_____	O M	O F	_____
Fourth		O M	O F	_____
Fifth	_____	O M	O F	_____
Sixth		O M	O F	_____
Seventh	_____	O M	O F	_____
Eighth		O M	O F	_____

PART 2 **ABOUT YOUR PRESENT TRIP TO TURKEY**

12- What were the main purposes of this trip to Turkey? (i.e. holiday, business, religious etc.)

Main purpose _____

Secondary purpose _____

13- What did attract you to Turkey while you were making your decision on this visit?

_____

_____

14- How many nights did you stay overnight in Turkey during this trip?

_____nights

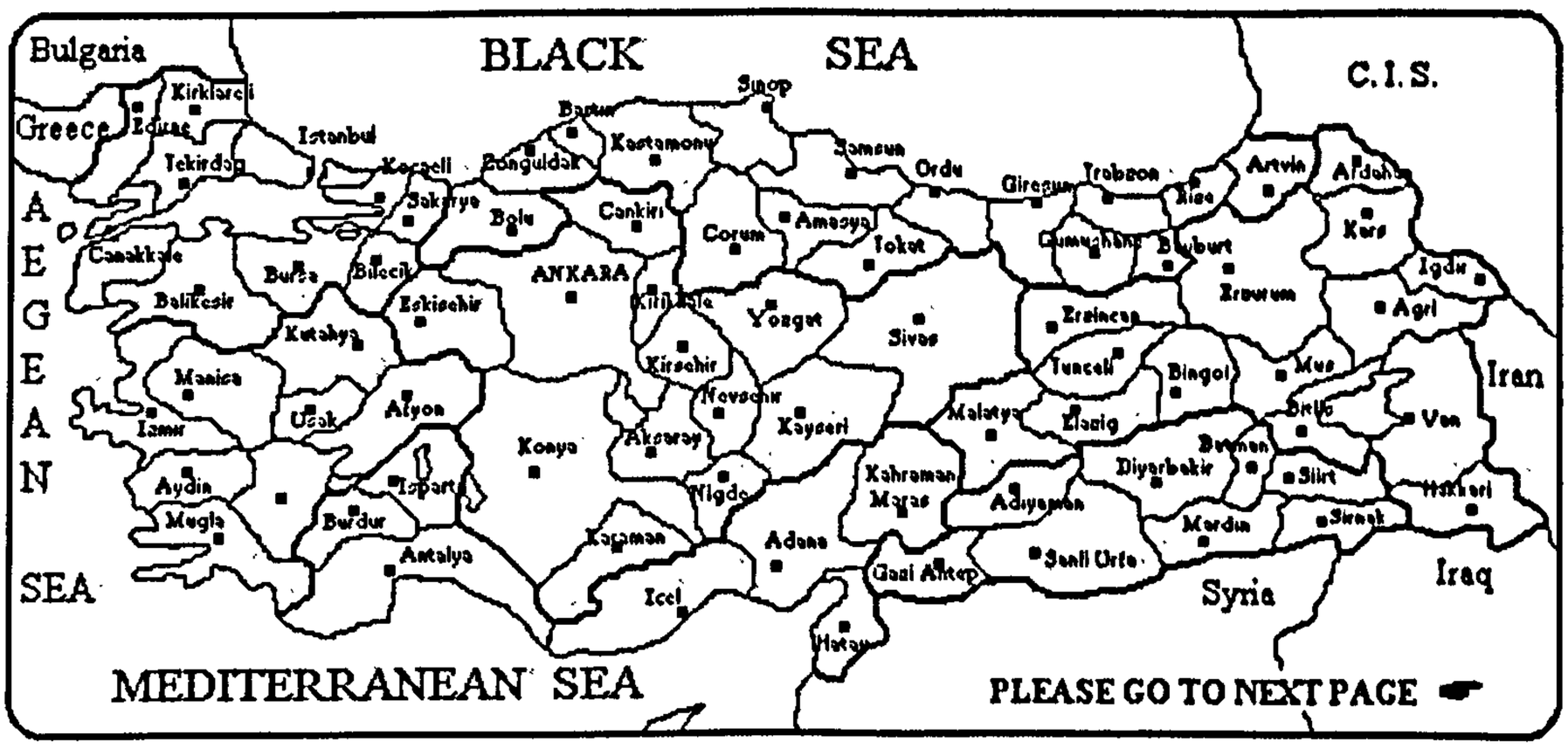
O None *(Go to Question 17)*

15- Could you please look at the map and tell me the places you visited and stayed during this trip at least for "1 night"? PLEASE FIND THE PROVINCES WHERE YOU STAYED AND WRITE DOWN ON THE MAP NUMBER OF NIGHTS YOU SPENT THERE.

IF YOU HAVE ANY DIFFICULTY IN FINDING THE PROVINCES WHERE YOU STAYED PLEASE WRITE DOWN NAME OF THOSE PLACES BELOW.

_____ _____ _____

_____ _____ _____



PLEASE GO TO NEXT PAGE

16- What kind of accommodation did you use while in Turkey?

- O Hotel
- O Motel
- O Holiday village
- O Special Licensed
- O Boarding House (Pension)
- O Camp/Caravan
- O Friends' & Relatives House
- O Other (Please specify) _____

17- What kind of activities did you participate in while in Turkey? (i.e. excursions, sports etc.)

_____

_____

18- What are your impressions about the services provided in Turkey?

FACILITIES	Very Good	Good	Average	Poor	Very Poor	Don't Know
Accommodation	O	O	O	O	O	O
Restaurants	O	O	O	O	O	O
Internal transports	O	O	O	O	O	O
Sanitary Conditions	O	O	O	O	O	O
Security	O	O	O	O	O	O
Health Services	O	O	O	O	O	O
Information	O	O	O	O	O	O
Other (Specify)_____	O	O	O	O	O	O
STAFF	**Very Good**	**Good**	**Average**	**Poor**	**Very Poor**	**Don't Know**
Accommodation	O	O	O	O	O	O
Restaurants	O	O	O	O	O	O
Tourist Guides	O	O	O	O	O	O
Drivers	O	O	O	O	O	O
Other (Specify)_____	O	O	O	O	O	O

19- What influenced you most in deciding the date of your holiday?

- O Timing of vacation fixed by my/my partner's job
- O Timing of vacation fixed by children's school holidays
- O Considered this time only
- O Other (Please specify) _____
- O Weather conditions
- O Prefer this time
- O Nothing particular

20- Which sources of information did you use for this trip?

- O Travel Agencies
- O Transportation Companies
- O TV, Newspaper, Magazine
- O Other (Please Specify) _____
- O Turkish Information Office
- O Tourism Fairs
- O Recommendation of friends

21- When did you book your holiday?

- O 1 week or less than 1 week ago
- O 2 weeks ago
- O 3-4 weeks ago
- O 5-8 weeks (1-2 months) ago
- O 9-12 weeks (2-3 months)ago
- O Over 13 weeks(3 months) ago

22- How did you organize this trip?

- O Completely through travel agency (Inclusive Package Tour)*(Go To Question 24)*
- O Completely by yourself
- O Partly through travel agency
- O Other (Please specify)_____

23- Could you please write down any expenses incurred during your stay in Turkey including accompanied persons?

£_____ DM_____ FF_____ Other_____*(GO TO Question 25)*

24- If you came with a Package Tour, could you please write down the expenses incurred per person?

£_____ DM_____ FF_____ Other_____

PLEASE GO TO NEXT PAGE

25- **Do you usually take second holidays?** O Yes O No

26- **Is this your second holiday?** O Yes O No

PART 3 ABOUT YOUR OPINION

27- If you were completely free to choose;
Which month would you prefer to take your holiday in Turkey?

SUMMER	AUTUMN	WINTER	SPRING
O June	O September	O December	O March
O July	O October	O January	O April
O August	O November	O February	O May

28- **What would be the main reason for your above choice?**

_____

_____

29- **Which part of Turkey would you visit?** ***(PLEASE USE THE MAP IF NECESSARY)***

O Marmara	(North-West Turkey)	O Central Anatolia (Turkey)	
O Aegean	(Western Turkey)	O Eastern Anatolia (Turkey)	
O Mediterranean	(Southern Turkey)	O South-West Anatolia (Turkey)	
O Black Sea	(Northern Turkey)	O All regions	

PART 4 ABOUT YOUR LAST VISIT TO TURKEY

30 **Have you been to Turkey before?**

O No ***(Go to Question 32)***

O If Yes,
How many times? _____
When did you last visit Turkey? Year: 19____ Month: _____
How many weeks (or days) did you stay? _____weeks (or_____days)
What was the purpose of your last trip to Turkey? _____

31- **What influenced you most in deciding the date of your last holiday in Turkey?**

O Weather conditions
O Timing of vacation fixed by my/my partner's job
O Timing of vacation fixed by children's school holidays
O Considered this time only
O Prefer this time
O Nothing particular
O Other (Please specify) _____

32- **Do you think you will visit Turkey again?**

O Yes O Perhaps O No O Do not Know

33- **Could you please write down any comments and recommendations?**

_____

_____

_____ (Please use overleaf if you need more space)

Questionnaire has ended. Have you completed all questions which you left to the end to answer?

THANK YOU FOR YOUR CO-OPERATION
PLEASE RETURN COMPLETED QUESTIONNAIRE TO THE INTERVIEWER.

OFFICE USE ONLY

Questionnaire No: Istanbul_____			Antalya_____	
Date:	March_____	November_____	Time:_____am _____pm	
Weather:	O Sunny	O Partly cloudy	O Overcast	O Rainy
Interviewer:	O Mrs. Ayse SOYBALI		O Mr. H.Hüseyin SOYBALI	

TÜRKISCHES MINISTERIUM FÜR NATIONALE BILDUNG
UND
UNIVERSITÄT BOURNEMOUTH, ENGLAND
NEBEN SAISON - UMFRAGE

Diese Fragen sollte nur von Deutschen, Österreicher oder Britischen Besuchern ausgefüllt werden

Guten Tag/Abend. Wir führen diese Umfrage in verschiedenen Teilen der Türkei durch, um mehr über Eigenschhaften und vorzüglich von Deutschen, Österreicher und Britischen urlauber zu erfahren.
Wir wären Ihnen sehr dankbar, wenn sie für uns ein paar Minuten Ihre kostbaren Zeit auf bringen würden, um diesen Fragebogen auszu füllen.
Ihre Auskünfte werden vertraulich Behandelt. Sie werden nicht für andere Zwecke verwendet.
Bitte kreuzen Sie das für sie Zutreffnde auf und geben den ausgefüllten Fragebogen Zurück.
Vielen Dank für Ihre unterstützung.

1- Welche Staatsangehörigheit haben Sie?
O Britisch O Deutsch O Anders
(Falls Sie **Andere** angekreuzt haben, geben Sie bitte den Fragebogen direkt zurück, **VIELEN DANK)**

1-A Macht es Ihnen etwas aus einige Fragen über Ihren Aufenthalt in der Türkei zu beantworten?
O Ja
(Falls Sie **Ja**, augekreuzt haben, geben Sie bitte den Fragebogen direkt zurück, **VIELEN DANK)**
O Nein

TEIL 1 PERSÖNLICHE INFORMATIONEN ÜBER SIE UND IHRE FAMILIE

2- Geschlecht: O Männlich O Weiblich

3- In welchem Land wohnen Sie? _____

4- Wie alt sind Sie?
O A 0 - 15 O D 35 - 44 O G 65 und darüber
O B 16 - 24 O E 45 - 54
O C 25 - 34 O F 55 - 64

5- Welchem beruflichen Status haben Sie?
O Arbeitgeber O Angestellter O Rentner
O Selbsständig O Arbeitslos O Hausfrau
O Arbeiter O Student O Keinen

6- Welchen Studium abschluß haben Sie?
O Hauptschule/Mittlere Reife O Fachhochschule/Universität
O Abitur O Weiterführender Studium O Keinen

7- Wieviel verdienen Sie?
O Unter DM 12,500 pro Jahr O Zwischen DM 40-50,000
O Zwischen DM 12,500-25,000 O Zwischen DM 52,500-75,000
O Zwischen DM 27,500-37,500 O Drüber DM 75,000 pro Jahr

8- Welchen Familienstatus haben Sie?
O Single*(Beantworten Sie Frage10 und folgende)* O Geschieden/Getrent Lebend
O Päärchen O Verwidwet
O Verheiratet O Aleinerziehender

9- Leben Kinder in Ihrem Haushalt? (Bitte wenden Sie die seite)
O Nein *(Bitte machen Sie bei Frage 10 weiter)*
O wenn **Ja**: Anzahe der Kinder
_____12 Jahre oder junger _____17-20 Jahre
_____13-16 Jahre _____21 Jahre oder älter

BITTE BEANTWORTEN SIE DIE FRAGEN AUF DER NÄCHSTEN SEITE

10- Mit wem sind Sie in den Urlaub gefahren?

O Alleine *(Beantworten Sie Frage12 und folgende)*

O Begleitet von

- ☐ Ehemann & Frau & Kinder
- ☐ Ehemann & Frau
- ☐ Frau
- ☐ Andere (wen) _____
- ☐ Eltern
- ☐ Kollegen
- ☐ Freunde & Verwante

11- Bitte Schreiben Sie in die Tabelle. Alter, Geschlecht und Beruf Ihrer Mitreisenden ein?
(BITTE tragen Sie die Informationen über sich selbst ein, und auch für alle Ihre Begleiter, deren Reisekosten Sie tragen)

MITREISENDE	*ALTER*	*GESCHLECHT*		*BERUF*
1-	_____	O Männlich	O Weiblich	_____
2-		O Männlich	O Weiblich	_____
3-	_____	O Männlich	O Weiblich	_____
4-		O Männlich	O Weiblich	_____
5-	_____	O Männlich	O Weiblich	_____
6-		O Männlich	O Weiblich	_____
7-	_____	O Männlich	O Weiblich	_____
8-		O Männlich	O Weiblich	_____

TEIL 2 — IHR AUFENTHALT IN DER TÜRKEI

12- Was ist der Hauptzweck für ihrer Reise in die Türkei? (Z.B.Urlaub,Geschäftsreise,Religion u.s.w)

Haupt Zweck _____

Neben Zweck _____

13- Was hat Sie daran bewogen in die Türkei zu reisen?

_____

_____

14- Wie oft haben Sie während dieser Reise in der Türkei Übernachtet?

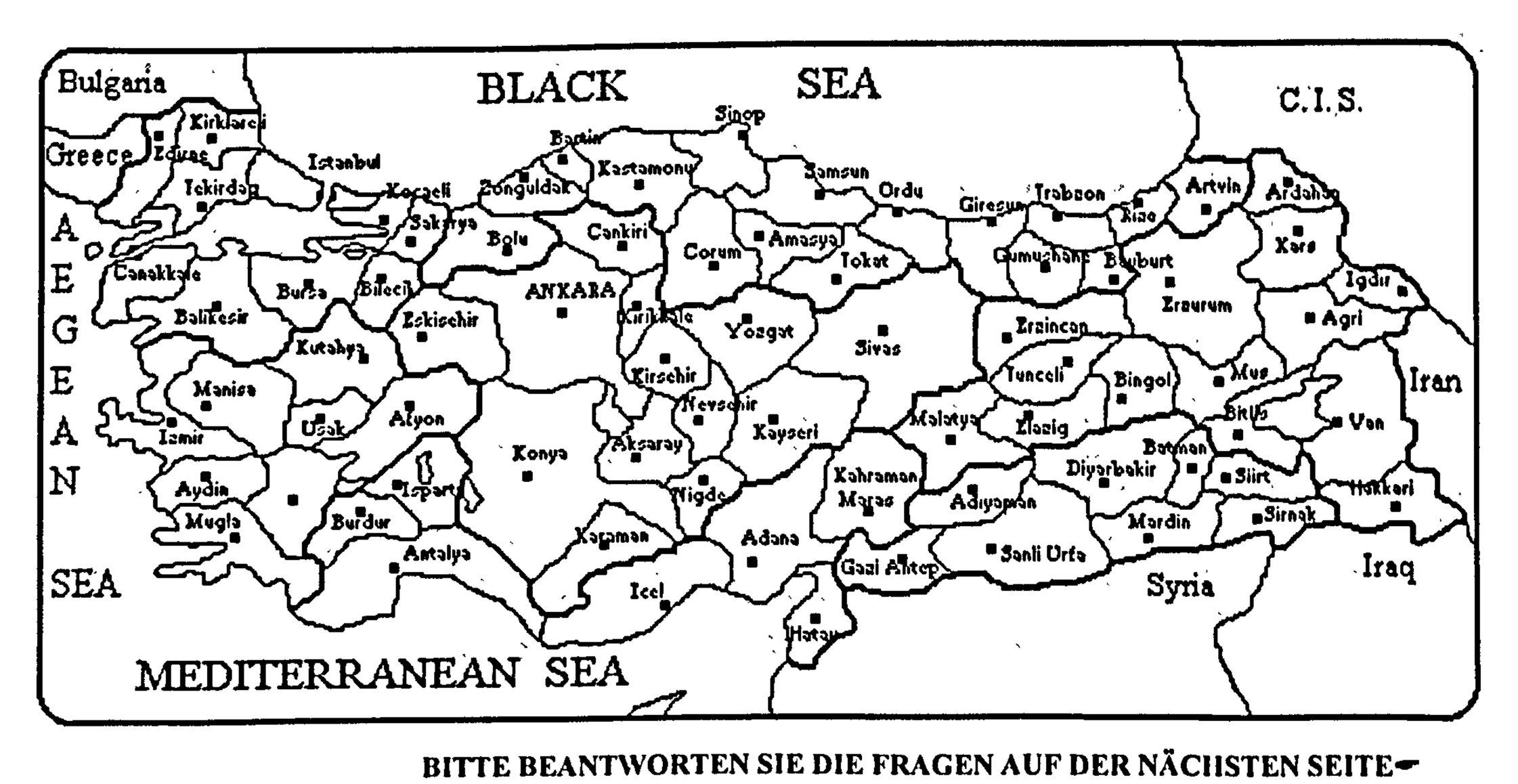
_____Nächte

O Keine *(Bitte machen Sie mit Frage 17 weiter)*

15- Bitte kreuzen Sie auf der Karte an, wo Sie mindestens einmal Übernachtet haben?
(BITTE geben Sie an, wie oft Sie dort Übernachtet haben)

_____ _____ _____

_____ _____ _____



BITTE BEANTWORTEN SIE DIE FRAGEN AUF DER NÄCHSTEN SEITE

16- Welche Art von Unterkunft haben Sie gewählt?

- O Hotel
- O Motel
- O Urlaubsdorf
- O Historisches gebuck (S)
- O Pension
- O Camping platz
- O Haus von Freunden oder Verwandten
- O Andere (Bitte Beschreiben Sie)_____

17- Was haben Sie während Ihres Aufenthalt in der Türkei unternommen? (Z.B. Ausflüge, Sport u.s.w.)

_____

_____

18- Was halten Sie von dem Service in der Türkei?

EINRICHTUNG	Sehr gut	Gut	Durchschnittlich	Schlecht	Sehr Schlecht	IchWeiß es nicht
Ünterkunft	O	O	O	O	O	O
Restaurant	O	O	O	O	O	O
Verkehrsmittel	O	O	O	O	O	O
Sanitäre bedingungen	O	O	O	O	O	O
Sicherheit	O	O	O	O	O	O
Gesundheitsdienst	O	O	O	O	O	O
Information	O	O	O	O	O	O
Anderes(Bitte aufführen)	O	O	O	O	O	O

EINRICHTUNG	Sehr gut	Gut	Durchschnittlich	Schlecht	Sehr Schlecht	IchWeiß es nicht
Unterkunft	O	O	O	O	O	O
Restaurant	O	O	O	O	O	O
Touristenführer	O	O	O	O	O	O
Bussfahrer	O	O	O	O	O	O
Anderes(Bitte aufführen)	O	O	O	O	O	O

19- Was hat Sie beinflußt genau zu diesem ort zu reisen?

- O Wetterbedingungen
- O Einzige möglichheit durch meinen Beruf/Beruf meines Partner
- O Gebunden an Schulferien
- O Habe angestrebt zu diesem ort in Urlaub zu gehen
- O Bevorzuge diese Zeit, um in den Urlaub zu fahren
- O Nichts bestimmtes
- O Andere (Bitte erläutern) _____

20- Welche Informationsquellen nützten Sie zur Vorbereitung dieser Reise?

- O Reisebüros
- O Transportunternehmen
- O Fernsehen, Zeitung, Zeitschriften
- O Andere (Bitte erläutern) _____
- O Türkisches Informations Büro
- O Touristmessen und äusstellungen
- O Empfchlung von Freunden

21- Wann haben Sie Ihren Urlaub gebucht?

- O Vor einer Woche oder weniger zuvor
- O 2 Wochen zuvor
- O 3-4 Wochen zuvor
- O 5-8 Wochen zuvor (1-2 Monate)
- O 9-12 Wochen zuvor (2-3 Monate)
- O Über 13 Wochen zuvor (3 Monate)

22- Wie haben Sie diese Reise Organisiert?

- O Durch ein Reisebüro*(Bitte machen Sie bei Frage 24 weiter)*
- O Allein
- O Teilsweise durch ein Reisebüro
- O Anders (Bitte erläutern)_____

23- Können Sie die Kosten ihrer Reise in die Türkei angeben (Inklusive die Ihrer Begleitung) durch Ihren Aufenthalt mit Unterbringung?

£_____ DM_____ FF___ Anders_____*(Bitte machen Sie bei Frage 25 weiter)*

24- Wenn Sie eine Pauschalreise gebucht haben, tragen Sie bitte die Kosten pro person ein?

£_____ DM_____ FF_____ Anders_____

BITTE BEANTWORTEN SIE DIE FRAGEN AUF DER NÄCHSTEN SEITE➡

25- **Machen Sie mehrmals einmal jährlich Urlaub?** O Ja O Nein

26- **Ist dieser Ihr zweiter Urlaub dieses Jahr?** O Ja O Nein

TEIL 3 — ÜBER IHRE MEINUNG

27- Wenn Sie Ihre Urlaubzeit frei wählen Könnten;
In welchem Monat würden Sie einen Urlaub in der Türkei bevorzügen?

WINTER		FRÜHLING		SOMMER		HERBST	
O	Dezember	O	März	O	Juni	O	September
O	Januar	O	April	O	Juli	O	Oktober
O	Februar	O	Mai	O	August	O	November

28- **Was ist Ihr Hauptgrund für diese Urlaubszeit?**

_____

_____

29- **Welchen Teil der Türkei würden Sie Besuchen?** *(BITTE benutzen Sie die Karte, wenn nötig)*

O	Marmara	(Nord-West Türkei)	O	Zentral Anatolien (Türkei)
O	Aegean	(Westliche Türkei)	O	Ost Anatolien (Türkei)
O	Mittelmeer	(Südliche Türkei)	O	Süd-West Anatolien (Türkei)
O	Schwarzesmeer	(Nordliche Türkei)	O	Alles

TEIL 4 — IHR VORHERIGER BESUCH IN DER TÜRKEI

30 **Waren Sie vorher in der Türkei?**

O Nein ***(Bitte machen Sie mit Frage 32 weiter)***

O Wenn Ja ,

Wie oft? _____

Wann haben Sie das letzte mal die Türkei besucht? Jahr: 19____ Monat:_____

Wieviele Wochen (oder Tage) Sind Sie geblieben?_____Wochen (oder_____Tage)

Was war der Zweck Ihren letzten Besuches in der Türkei? _____

31- **Was hat Sie beeinflußt genau zu letzten Ort zu reisen?**

O Wetterbedingungen
O Einzige Möglichkeit durch meinen Beruf/Beruf meines Partners
O Gebunden an Schulferien
O Habe angestrebt zu diesen ort in Urlaub zu gehen
O Bevorzüge diese Zeit, um im Urlaub zu fahren
O Nichts bestimmtes
O Andere (Bitte erläutern) _____

TEIL 5 — ÜBER IHRE MEINUNG

32- **Würden Sie wieder die Türkei Besuchen?**

O Ja O Vieleicht O Nein O Ich weiß es nicht

33- **Möchten Sie noch gerne etwas besonders erwähnen zu diesen Thema?**

_____

_____

_____(Bitte Schreiben Sie weiter auf der Rückseite)

Haben Sie alle Fragen die Sie sich bis zum Schluss aufgehoben, beantworten?
VIELEN DANK FÜR IHRE HILFE UND KOOPERATION
BITTE GEBEN SIE DEN FRAGEBOGEN WIEDER ZURÜCK
BITTE DIESE STELLE NICHT BEANTWORTEN (Nur Für Offizielle Benützung)

Questionnaire No: Istanbul_____			Antalya_____
Date:	March_____	November_____	Time:_____am _____pm
Weather:	O Sunny	O Partly cloudy	O Overcast O Rainy
Interviewer:	O Mrs. Ayse SOYBALI		O Mr. H.Hüseyin SOYBALI

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