

STRUCTURAL FEATURES OF TURKISH TOURISM INDUSTRY: A COMPARISON WITH TOURISM POLICIES OF THE EUROPEAN UNION

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Abstract:

Tourism policies of the European Union are very important with in the candidate and periphery countries, including Turkey. There are serious attempts in Turkey for harmonisation of the policies of European Union, including tourism. In this study, the developments of the Turkish tourism, are analysed, compared and discussed with respect to the Union's tourism policies.

Özet:

Türk Turizm Endüstrisinin Yapısal Özellikleri: Avrupa Birliği Turizm Politikaları İle Bir Karşılaştırma

Avrupa Birliği'nin turizme yönelik politikaları Türkiye'yi yakından ilgilendirmektedir. Genel olarak değerlendirildiğinde, Türk turizm politikalarının, Avrupa Birliği'nin turizme yönelik aldığı kararlarla, uyumlaştırılmaya çalışıldığı gözlenmektedir. Bu çalışmada, Türkiye turizmine ait son yıllarda gözlenen gelişmeler, Avrupa Birliği üyesi ülkelerin Türkiye'ye yönelik turistik talepleri ve Avrupa Birliği'nin turizm politikası çerçevesinde değerlendirilmekte, karşılaştırılmakta ve tartışılmaktadır.

Keywords: International tourism, European Union, Turkish tourism, European Union's tourism policies, Harmonisation.

Anahtar Sözcükler: Uluslararası turizm, Avrupa Birliği, Türkiye turizmi, Avrupa Birliği turizm politikaları, Uyumlaştırma.

Introduction:

Tourism today, with its 10.7% share within the world economy, 3,3 trillion dollars of work potential and labour force which consists of up to 300 million people, constitutes an important part in the service sector. Some further points on tourism are, according to World Trade Organisation, its potential of creating additional jobs for up to 120 million people in coming next ten years and its continuing development between 1950-2000 in respect to contribution to tourism facilities and revenues created.

Departing from statements above and related statistics, another interesting point is, although Europe is still an important region for tourism activities there is an observable rise in the share of the East Asian and Pasific region in world tourism. There is a similar rise can be observed in Turkish tourism as well. Although Turkish tourism faced some negativeness in the years of 1991, 1994 and 1998, it has a serious potential to be one of the leading in the international tourism. In order to activate this potential, Turkey should overcome some critical tresholds. The most important step is to constitute a service quality parallel to EU norms. Within this study we will eloborate and discuss the Turkish tourism and touristic demands of Member States from Turkey with respect to the European Union's tourism policy.

1. Some Important Statistics And Developments Related To International Tourism

Based on World Tourism Organisation figures (WTO, 1998) over the 10 year period 1988-1997, global tourist receipts and arrivals grew on average at 9,8 and 5,4 per cent/annum, respectively. Growth rates, however, display a general decline as the industry matures. The growth in receipts fell from an average of 15,1 percent over the first three years of this 10-year period to an average of 8,1 per cent annum over the last three year of this period. Similarly, arrival growth fell from 8,0 to 3,7 per cent/annum. These average global growth rates mask regional differences. Table 1 demonstrates that the East Asia / Pacific region has been the main beneficiary of growth whereas traditional destinations in Europe have experienced a decline in the market share. Interestingly, although the market share of arrivals to Africa and the Middle East has grown the share of receipts by these two regions has fallen whereas the opposite has occurred for the Americas (Ritchie & Crouch, 2000: 1).

Table 1:
Global Tourism Market Share Trends

Region	1975		1999	
	Arrivals %	Receipts %	Arrivals %	Receipts %
Europe	69,2	63,5	59,0	49,3
Americas	22,5	25,1	19,4	27,1
East Asia / Pacific	3,9	5,35	14,7	18,7
Africa	2,1	3,1	3,8	2,0
Middle East	1,6	2,1	2,4	1,9
South Asia	0,7	0,8	0,7	0,9

(Ritchie & Crouch, 2000: 2)

According to 1998 WTO statistics:

- During 1990's, continuous development of tourism sustained and created employment for 625 million people and 445 billion US dollars income.
- Except the year 1991, continuous development sustained and in 1998, 59.6% of tourist arrivals were to Europe and Europe created 60% of revenues.
- On the basis of arrivals during the years 1993, 1994 and 1998 and on the basis of revenues during the years except 1991, 1994 and 1998, Turkey exceeds the world's and Europe's rate of change values.
- Starting from the mid 80's, France, Spain, USA, Italy and UK are the leading countries in tourism when arrivals concerned. Additionally, the improvement in China and Poland is significant.
- Same picture can be observed when revenues created are concerned. According to the 1998 statistics, countries in the first ten like USA, Italy, France, Spain, UK, Germany and Canada hold 47% share in the total revenue created. Countries, including Turkey, in the rank between 11 and 20 hold 18% share in the total (WTO, 1998).

2. Tourism And The EU

Tourism is a phenomenon, which involves the majority of European citizens, as users and providers of tourist-related services, in Member States and in a wide range of third country partners.

The European Union still maintains its leading position in world tourism with a growth rate in 1998 of 3.7% in terms of international arrivals and of 1.92% in terms of receipts (WTO, 1999). Despite Europe's decrease of world market share, it is the main originating area as well as the main destination of international tourist flows in terms of arrivals and departures, of receipts and international commercial exchanges. EU Member States accounted for 40.8% of arrivals and 38.3% of receipts in international world tourism (WTO, 1999). It is currently estimated that tourism related activities directly employ 9 million people in the European Union. Tourism's direct contribution in terms of jobs is particularly significant in some tourism intensive economies; it also has an important indirect effect on employment in related services. Tourism is seen as a major source of job creation over the coming years, in particular in less developed and peripheral regions. Some sources estimate that travel and tourism jobs will increase by 2 million by the end of the next decade, and will represent over 9% of total employment in the European Union, in comparison with 6% now.

In terms of job creation, small and medium-sized tourism enterprises (SMEs) play a vital role. European tourism is largely a SME-dominated sector, with over 99% of firms employing fewer than 250 individuals. These contribute significantly to Member States' GDP. In 1997, tourism SMEs represented 7.4% of total SMEs in Europe, 94.2% of which was enterprises employing fewer than 10 persons. Six point five percent of the total turnover of European SMEs is generated by tourism SMEs.

Tourism's economic contribution is not the only indicator of its beneficial impact. Travel and leisure activities are also social indicators, since tourism is no longer an activity for the privileged few, but rather a widespread experience for the great majority of EU citizens. This is illustrated by the results of the Eurobarometer survey Facts and Figures on the Europeans on Holidays (March 1998), which was carried out on behalf of Directorate General XXIII.

Although there are specific arrangements on important issues like transportation, environment, taxation etc., Union's established tourism policy came to the agenda relatively late in comparison to the those (TURSAB, 1997: 10). The European Commission, recognising the important role of

tourism in the European economy, has been increasingly involved in tourism since the early 1980's, in cooperation with the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions. An important step forward was taken with the establishment of the Tourism Advisory Committee in 1986, the role of which is to facilitate exchange of information, consultation and co-operation on tourism (Council Decision 86/664/EEC establishing a consultation and co-operation procedure in the field of tourism, 22 December 1986, OJ No L 384, 31.12.1986, p. 52). At present, the Advisory Committee is composed of representatives from the 18 EEA countries who provide information on the measures taken at national level in the area of tourism. This Committee meets about 3 times a year.

The Council of Ministers to declared the year 1990 as the "The European Year of Tourism". It was a further initiative designed to emphasise the integrating role of tourism in the creation of Europe and to stress the economic and social importance of tourism in the creation of Europe (Council Decision 89/46/EEC on an Action Plan Program for a European Year of Tourism of 21 December 1988, OJ No L 17, 21.1.1989, 53).

In 1992, an Action Plan to Assist Tourism was adopted by Council, which, ran for three years between 1993-1995. (Council Decision 92/421/EEC of 31 July 1992). The goals of the plan were:

- To achieve better coordination and knowledge of tourism industry and,
- To simulate innovation, create additional activity and encourage exchanges of information and transfer experience (Ketelsen, 1997: 2).

In 1993 Maastricht Treaty also created important effects on tourism sector. These were mainly the attempts for,

- The abolishment of *physical* obstacles related to customs and borders,
- The abolishment of *technical* obstacles by harmonisation of standards in health and custom standards, (Göymen, 1997: 29-35)

In relation to those (Erol, 1995: 28-35);

- There was an increase on transport taxation.
- A standardised taxation between 14-20% is set for much of the tourism services.

- According to the customer protection regulations an increase in the hotel prices occurred. This created a chain effect and put pressure on travel agencies as well.
- Travel agencies started to expect same or parallel standards in the third countries that they deal with.
- Loans were created to the travellers who decided to spend their holidays in EU.

The next step was the Commission's adoption in 1995, before the Intergovernmental Conference for the revision of the Treaty, of a Green Paper on the Role of the Union in the field of Tourism, in order to stimulate a debate on the Union's role in tourism. In this paper, Commission stated the importance of tourism for the Union and put forward four points related to the subject (TURSAB, 1997: 20-21).

- Sustaining the promotions for tourism
- Sustaining the 1993-96 Tourism Action Plan
- Giving importance to tourism policies without changing the existing agreements.
- Strengthening the legal background of the tourism facilities within the Union.

A proposal for a Council Decision on a First Multiannual Program to assist European Tourism ("Philoxenia" 1997-2000) based on the Green Paper and the European Commission adopted an external evaluation of the Action Plan on 30 April 1996. The aims of the Philoxenia program were to accelerate the current policies, statistical standardisation in information transfers, harmonisation of policies of tourism with other sectors, creation of a judicial and financial structure for tourism, protection of consumer, create tourism demand from third countries and to improve demand within the Union. A modified version was presented by the Commission in December 1996 taking into account amendments put forward by the European Parliament.

In the light of information given above, although there are attempts to constitute a single tourism policy for European Union, Union could not formed one. In addition to the decisions relation to the tourism policies, these policies is mostly carried out by the policies related to consumers, employment, taxation, transportation, environment, culture, competition and member state's own decisions.

3. EU Policies Related To The Development Of Tourism in Third Countries And Turkey

EC support for tourism has as its goal the sustainable development of the sector in the light of Community measures (*acquis communautaire*) affecting tourism (Commission Report 97/332), 1997 and be informed by the general objectives of development cooperation as set out in Article 130u of the Maastricht Treaty. They are designed to reduce poverty, achieve sustainable economic and social development, and integrate the developing countries into the global economy and further the aim of respecting human rights and fundamental freedoms.

The development of the tourism sector, given its importance in international trade and in the exportation of services, can make a major contribution to integrating the developing countries into the world economy.

The development of tourism can also contribute to the sustainable economic and social development of the recipient country provided the underlying objectives go beyond simply increasing the number of beds, tourist arrivals and tourist revenues at any price. Tourism's contribution to sustainable development will be contingent on:

(a) The ability of governments to plan and manage the development of tourism taking account of all the economic, social, cultural and environmental aspects and the potential drawbacks and

(b) The industry's commitment to adhere to the principles and practices of sustainable development in an open and competitive market.

EC policy for the development of tourism must mesh with Article 6 of the consolidated version of the Amsterdam Treaty according to which the protection of the environment must be integrated into the Union's other policies in order to promote sustainable development.

A well-run, socially viable industry that generates revenue and is mindful of the needs of the environment could help alleviate poverty by offering all those entering the industry greater scope for better jobs, training and career development while expediting the building of infrastructure, facilities and services aimed at improving the host population's living conditions.

With a view to fulfilling its development objectives, the EC's goal should be to help create the conditions for maximising the contribution of tourism to the economic and social development of the host country and minimising any actual or potential deleterious effects.

Tourism is an ideal test-bed for implementing and monitoring the principles of sustainable development but the EC's efforts to develop tourism should not be confined to "alternative" tourism but should also promote a genuine commitment on the part of the public authorities and the tourism industry in general to pursue viable policies compatible with environmental and social considerations¹.

Union's tourism policies constitute higher priorities for Turkish tourism because Turkish tourist inflow is mainly consists of European citizens. In 1999, 1998 and 1997 arrivals from European citizens constitute 46%, 54.5% and 54.2% of total arrivals respectively (Ministry of Tourism, 1999: 2-3). The compatibility of Turkish tourism with the improvement of service quality in tourism and variation of tourist activities in EU will affect the demand for Turkey (Silahtaroglu, 1997: 15-21).

In general, Union's tourism policies are in harmony with the Turkish ones. According to Union policies, for example, tourism undertakings are often viewed as small and widely scattered, with their activities spanning several sub-sectors: this fragments the profession and hampers dialogue between the industry's various branches and professions so that government often finds it hard to see the big picture and satisfactorily satisfy the legitimate needs of these firms. As the industry has many sub-sectors, the creation of private sector driven national tourism boards could be encouraged and serve as a platform for permanent dialogue and consultation for professionals and an interface with the public authorities.

As the industry boasts a vast number of small businesses (SMEs), the associations representing the sector as a whole could play a key role in helping their members improve their standards and performance. EC support to recognised professional bodies in this field might consist of training competent personnel and strengthening institutions to help them become service-providing bodies able to offer their members innovative and value-added services. They could also be given technical assistance to help them mount programs aimed at improving the industry's performance overall or in specific sub-sectors such as in-house training programs, quality programs for tourist enterprises, programs to promote schemes compatible with the

environment and to boost cooperation on product development and enhancement.

SMEs possess enormous potential to create jobs both for employees and for the self-employed, providing the local population with greater opportunities and helping to make greater inroads in reducing poverty. Incoming tourism, generated by the use of the tourist destination's take-up capacity have a knock-on effect in terms of extra business for SMEs and micro enterprises in the form of crafts, small shops, local transport and the food industry. Opportunities for creating and developing SMEs in the tourist and allied industries could be bolstered through the various instruments deployed in support of the private sector as a whole instead of creating separate instruments.

Keeping in mind the statements above, in Turkey, State Planning Organisation (SPO) in its Seventh Five Year Development Plan which covers the years 1996-2000, stated that: "In the seventh plan period, it shall be the principal to benefit from existing super-structure more efficiently and to protect environmental and natural capital...depending on new tendencies in the demand pattern, development of small size enterprises in the sector shall be given priority." (SPO, 1995: 174). Similarly, the plans for promoting collaboration between the private sector and direct support for SMEs can also be given as examples.

Also in the same plan the statement of "The primary objectives of tourism sector are the development of a highly competitive nature and productive tourism economy, meeting the expectations of local people and tourists from tourism, enriching natural and cultural values and their continuity" (SPO, 1995: 175) shows strong similarities with the Union's tourism policies.

Union's consumer protection policies are highly related to the tourism sector. The policies of Union, which protects and informs the consumer, find its echo in the third countries, including Turkey, as well. The main headings of Commission's consumer policy, which effects tourism sector, can be pointed out as:

1. The standards for consumer protection
2. Reliable information about the product

In order to protect the consumer within the Union, standardisation of the tourism services within the Member States is one of the main targets of

the Commission (TURSAB, 1997). Although the concept of "consumer rights" is relatively new to the Turkish judicial system, the protection of tourists and their rights was regulated in 1972 with the Travel Agencies Law No: 1618, and in fact it was implemented much more earlier than most of the European countries (Ünsever, 1999). In addition, TURSAB, which is the legal union of the travel agencies in Turkey, within one of its branch, provides service to the consumers with their complaints about agencies.

Although Turkish consumer protection law, which is, structured parallel to the Union's rules and regulations has some shortcomings, it provides more protection to the consumers compared to some Member States (IKV, 1998: 15-34).

However, besides those harmonised issues Turkish tourism faces some basic problems in relation with the developing world tourism. The problems of Turkish tourism was determined as follows in the First Tourism Meeting which was held in Ankara in 1998 (Ministry of Tourism, 1998: 2-3):

1. Image problems
 - a. Anti-democratic practices
 - b. Human right infringements
 - c. Radical Islamic movements
 - d. Terror
 - e. Historical prejudices
 - f. Environmental issues
2. Presentation problems
 - a. Image problem
 - b. Lack of coordination
 - c. Financial insufficiency
 - d. Misuse of public expenditures
3. Service quality problems
 - a. Implementation of consumer rights
 - b. Lack of state control
 - c. Lack of consciousness of society
 - d. Transportation problems
 - e. Price fluctuations
4. Problems related to international developments
 - a. The affect of universal economic crises

- b. Competition problems related to the Union's policies
- c. Problems of harmonisation with Euro
- d. Lack of international awareness among local firms

4. Turkish Case Continued: Comparative Structural Features of Turkish Tourism

Turkey today, with its choices in line with liberal economic paradigm and construction, which involves social and economic dualism, tries to integrate with the international economic system. There are some serious effects coming from the financial problems, unemployment and high inflation, which undoubtedly effects all sectors. However with its GDP with the greatest portion (which is 59.5%) coming from the service sector, (UCCET 1999, 26) viewed a dynamic and young economy which passed the take-off level.

Such an economic structure has significant affects on the tourism industry. The basic structural changes and improvement attempts in tourism industry in the mid 80's proves this proposition. In the following paragraphs the demand and supply characteristics of Turkish tourism will be analysed departing from those points.

Demand Characteristics:

The economic contribution of tourism to the Turkish economy and the number of visitors increased significantly thorough the years: In 1963, 198841 tourists arrived in Turkey. In comparison to that, although it was an unsuccessful season for Turkey in 1999, the number reached up to 7 million 487 thousand. In 1998 the tourism income was 7 million and 177 thousand US dollars, with the 9 million and 752 thousand visitors.

Analysis on the nationality of the visitors since 1973 shows that German visitors constitutes a significant part of the tourists: In 1998 and 1999, German visitors constitutes 22.9% and 18% of the total arrivals respectively. Additionally visitors from OECD countries constitute another important figure in Turkish tourism with the share of 48.2% of total arrivals in 1999.

Visitors mostly prefer Turkey for holiday purposes (54.4% of total visitors in 1999). The analysis of the visitors on the basis of their income shows us that the 67% of the visitors belong to the middle class (SSO, 1999:

2). Within the light of this information, one of the important dilemma of the Turkish tourism can be viewed as, its characteristic of low prices in the sector in contrast to its potential and capacity (Hacikadiroğlu, 1998: 13-16).

Supply Characteristics:

Since 1960's Turkish tourism tried to be improved within plans. 1970's are the years which Turkish State constructed infrastructure and superstructure for Tourism industry. In 1980's support and investment policies came into force with significant liberal policies.

Between the years 1963 and 1999 the structure of tourism industry supply changes significantly. In the former years the problem was mostly related with the unsatisfactory premises supply, but started form the mid 80's it turned out to be a marketing and presentation problem. The unplanned rise in the supply of premises caused damages in environment and the lack of state and sector checks in commercial activities end with the decrease in the service quality. This situation seriously damages the image of Turkey and strengthens the proposition that 'the only advantage of Turkey is its low prices'.

Comparative Structure of Turkish Tourism:

In 1998, according to the tourism income, the number of arrivals and tourism investment statistics, Turkey was 8th, 14th and 20th respectively among 20 countries within Europe. In comparison with the chosen EU countries the results are as follows².

Tourism Incomes

Although Turkey's tourism incomes was below EU member countries like Greece and Portugal in the mid and late 80's, starting from 1989 tourism incomes of Turkey exceeded these countries incomes. However Turkey's tourism incomes is still well below the other EU member countries like France, Spain and Italy.

Table 2:
Tourism Incomes Compared to Turkey

Country	1989	1994	1995	1996	1997	1998
Italy	4.7	5.5	5.6	5.0	3.7	3.9

Spain	6.3	5.0	5.1	4.6	3.3	3.8
France	6.4	5.7	5.6	4.8	3.5	3.8
Portugal	1.1	0.9	0.9	0.7	0.5	0.6
Greece	0.8	0.9	0.8	0.6	0.5	0.5
Turkey	1.0	1.0	1.0	1.0	1.0	1.0

(Table created by authors, with the data's compiled from the Turkish Ministry of Tourism)

Due to the 1997 statistics, France's, Italy's, and Spain's Gross National Products (GNP) are 7.9, 5.9, and 2.9 times more than the Turkey's GNP respectively. However in comparison with Greece and Portugal Turkey approximately doubles the GNP's of those countries. Following table points out the importance of tourism within GNP's of countries in question.

Table 3:
 Percentage of Tourism Incomes in GNP

Country	1989	1994	1995	1996	1997
Italy	1.70	2.17	2.55	2.63	2.60
Spain	5.27	4.10	4.74	4.92	4.67
France	1.33	1.82	1.90	1.85	1.86
Portugal	5.29	4.25	4.62	4.22	4.07
Greece	1.70	4.88	4.81		
Turkey	2.09	3.25	2.99	3.24	4.17

(Table created by authors, with the data provided from the Research and Evaluation Office of the Turkish Ministry of Tourism)

The share of tourism income in the export revenues of Spain, Portugal, Greece and Turkey is relatively high: 31.11%, 25.57%, 18.42% in Turkey, Spain and Portugal respectively. Table 4 analyses the share of tourism income in the export revenues.

Table 4:
 Percentage of Tourism Incomes in Export Revenues

Countries	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
Italy	10.06	10.41	9.57	8.59	11.77	11.10	12.05	13.11	12.43	11.85	11.96	12.61
Spain	44.66	43.41	41.72	35.94	33.20	31.67	34.12	32.36	29.40	27.90	27.13	25.57
France	8.17	8.30	8.51	9.39	9.61	1.04	10.80	11.44	10.46	9.59	9.81	9.76
Portugal	21.90	23.83	21.84	20.65	22.22	23.19	20.67	27.08	21.27	18.87	17.77	18.42
Greece	30.57	32.40	47.92	24.70	32.34	28.52	32.37	37.06	43.39			
Turkey	15.19	17.21	19.63	21.31	14.02	18.96	24.26	26.29	24.01	22.53	25.92	31.11

(Table created by authors, with the data provided from the Research and Evaluation Office of the Turkish Ministry of Tourism)

Tourist Arrivals

The analysis between the years 1986 and 1998, provides two important facts

- The gap between Turkey and Italy, France and Spain is decreasing
- Numbers are similar with Greece and Portugal

Table 5:
Comparison of Tourist Arrivals

Countries	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998
Italy	10.4	7.0	6.6	5.6	5.0	2.7	4.5	4.6	4.4	4.1	3.8	3.8
Spain	13.3	9.4	9.0	7.1	7.5	3.8	6.3	7.2	5.5	5.1	4.8	5.3
France	15.0	11.5	12.6	10.9	10.7	6.3	10.3	10.2	8.5	7.8	7.4	7.8
Portugal	2.5	1.8	1.8	1.7	1.7	0.9	1.4	1.5	1.3	1.2	1.1	1.2
Greece	3.1	2.1	2.1	1.8	1.6	1.0	1.6	1.8	1.4	1.2	1.1	1.2
Turkey	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0

(Table created by authors, with the data compiled from the Turkish Ministry of Tourism)

Number of Room and Number of Bed

Table 6 and 7 shows us the continuing improvement of Turkey in the supply of accommodation. Important points to highlight are the catching up Portugal and Greece and closing the gap with other countries as supply of accommodation concerned.

Table 6:
Comparison of Number of Room

Countries	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
Italy	21.7	19.2	16.4	13.6	11.6	9.9	9.1	8.0	7.5	7.1	6.6	6.4
Spain	13.4	11.8	10.6	8.8	7.4	6.6	5.1	4.5	4.7	4.1	4.0	3.9
France	11.8	10.5	9.2	8.0	6.7	5.8	5.8	5.0	4.5	4.5	4.3	4.1
Portugal	1.5	1.4	1.3	1.1	1.0	0.9	0.8	0.8	0.7	0.7	0.6	0.6
Greece	4.5	4.1	3.7	3.3	2.9	2.6	2.4	2.2	2.1	2.1	2.0	2.0
Turkey	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0

(Table created by authors, with the data compiled from the Turkish Ministry of Tourism)

Table 7:
Comparison of Number of Bed

Countries	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
Italy	19.6	17.3	14.9	12.2	10.3	8.9	8.1	7.5	6.7	6.3	6.0	5.8
Spain	12.2	10.7	8.6	8.0	5.6	5.1	4.7	4.4	4.4	3.9	3.7	3.6
France	11.8	10.9	9.2	7.9	6.6	5.7	5.6	5.2	4.4	4.4	4.2	4.0
Portugal	1.7	1.6	1.4	1.2	1.1	1.0	0.9	0.9	0.8	0.7	0.7	0.7
Greece	4.3	3.9	3.5	3.1	2.7	2.3	2.2	2.1	2.0	2.0	1.9	1.8
Turkey	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0

(Table created by authors, with the data compiled from the Turkish Ministry of Tourism)

Average Length of Stay and Occupancy Rate

1998 the occupancy rate of Turkish tourism premises is around 46.1%. Table 8 and 9 provides the comparison with other countries, which indicates the insignificant differences.

Table 8:
Comparison of Average Length of Stay

Countries	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
Italy	14.3	11.1	7.9	7.3	6.4	8.9	5.0	5.0	6.2	6.1	4.6	3.3
Spain	15.0	11.7	7.9	7.0	5.2	7.9	4.9	5.2	6.4	5.8	4.2	3.1
France	54.5	41.0	19.7	31.2	29.1	40.8	25.7	25.4	31.0	26.5	18.0	13.7
Portugal	2.7	2.1	1.5	1.5	1.5	2.3	1.2	1.1	1.3	1.2	0.9	0.6
Greece	5.8	4.3	2.8	2.8	2.6	3.1	2.2	2.1	2.5	2.1	1.4	1.1
Turkey	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0

(Table created by authors, with the data compiled from the Turkish Ministry of Tourism)

Table 9:
Comparison of Occupancy Rate

Countries	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
Italy	0.8	0.8	0.8	0.8	0.9	1.1	0.8	0.8	1.0	0.9	-	-
Spain	1.2	1.2	1.1	1.1	1.1	1.4	1.1	1.1	1.5	1.3	1.2	1.1
France	-	-	0.6	0.7	0.8	0.9	0.7	0.7	1.3	1.1	1.0	1.0
Portugal	0.8	0.8	0.8	0.8	0.8	1.1	0.7	0.7	0.9	0.8	0.7	0.7
Greece	1.2	-	-	-	0.8	0.9	1.2	1.2	1.5	1.2	1.1	1.1
Turkey	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0

(Table created by authors, with the data compiled from the Turkish Ministry of Tourism)

Expectations and Targets of the Turkish tourism

Future expectations and targets of Turkish tourism are highly dependent on the Turkey's geographical position, economic structure and international developments.

Turkey is a Mediterranean country. Nine of the important tourism centres out of 40 are in the Mediterranean region, with its potential of 168 million tourists which 140 million of them are Europeans. Because of its important potential, WTO held a research in the region, which highlights following points (IKV, 1999: 46-57):

Tendencies in the Mediterranean tourism

1. Resistance of traditional beach tourism
2. Existing of new routes and tendencies
3. Importance of diversity and importance of tourism premises
4. Continuity of dead seasons phenomena
5. Tourism tendencies of immigrants
6. Emerging of new tourism products and tourism behaviour
7. Boom of the sea sports and hobbies
8. Easy transportation to the region
9. Region which creates tourists

Problems of the Mediterranean tourism

1. Sea pollution
2. Over dose construction along the beaches
3. Seasonal tourism
4. Political clashes
5. Financial problems
6. Depreciation of product
7. Obligatory external competition

As a Mediterranean country all these points are valid for Turkish tourism as well. The report on the "The Strategic Targets of Turkey in the Medium and Long Term" (Güvenen, 1999: 40-45) which was prepared by State Planning Organisation in 1999, points out the route for Turkish tourism:

- For the last 20 years globalisation phenomena is in the core of the development debates. The disappearing of the borders between regions, countries, organisations and private firms, are not only in the area of commercial and investment activities but also in the environmental and the usage of the natural resources.
- 21st century will be the "century" for the countries, which invest and create policies for economic development and social justice with respect to protection of environment for the sustainable development.
- One of the important challenge for the world economy in the coming years will be the integration of the developing countries to the global economic structure. Developing countries will be a part of the global economic structure, if and only if they strengthen their economic, social and organisational setups.
- According to the United Nations statistics between the years 1960-1992, Turkey, is in the first ten when development is considered.

- This is also important for the improvement of service quality and Turkey is working on this subject hardly as well.
- Turkey's geographic situation constitutes a natural bridge between Europe and Black Sea, Caucuses and Mid Asia countries. This will serve to the need of interaction between religions, cultures and societies.
- When finished, SouthEastern Project will accelerate the economical structure in the region.

When the important points like the rich natural resources, characteristic providing and exporting capital and appropriateness for foreign investment is added to the above statements, it is not a surprise that Turkey will be a great economic force in the world. Undoubtedly, this will be in favour of the tourism economy within the Mediterranean region.

In the light of the WTO statistics and SPO's determinations the question of "What are the future targets of Turkish tourism?" can be answered under seven main headings (Tan, 1999: 4-5)

1. To construct the tourism supply according to
 - the actual and potential needs of the local investors who host the tourists and
 - The consideration of the total service quality in respect to the price-quality relation.
2. To rise it's share in total economy, with the priorities given to the improvement of vocational aspects.
3. In the long term, with the increased share in the global tourism revenues to be in the first ten of the countries in respect to the tourism incomes, in the short term to keep the actual market share.
4. To keep our cultural values while providing tourism services fully compatible with the EU norms.
5. To activate tourism potential in the less developed regions in favour of the local public
6. To improve the internal tourism
7. For sustainable development, to keep all natural and historical values while providing tourism services.

5. Conclusion:

This paper provided information about the tourism approach in Turkey and a comparison of this approach with the European Union tourism policies. In Turkey and also in other developing countries, different stages of the tourism development and products raise a variety of problems, which must be resolved in different way.

When revenues created analysed for Turkish tourism, it is obvious that Turkish tourism must take European Union norms and policies as reference for improvement. However the lack of a single tourism policy within the Union makes this task harder. Within this complexity this paper figured out that

1. Turkey's tourism policies are in line with the European Union's and also Turkey tries to improve this,
2. After 1980's the improvement of Turkish tourism is significant and,
3. Turkey surpasses some of the Member States in tourism sector.

In all aspects, Turkey built up its future tasks and expectations in line with the European Union and global economic norms. Tourism activities constitute an important part among these tasks and undoubtedly will contribute to the realisation of the Turkey's future targets.

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