



Turizm ve İşletme Bilimleri Dergisi

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Assessment of Turkish Tourism as of 2024: Strategic Directions and Sustainable Development*

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Öz

This study examines the Turkish tourism sector in 2024, focusing on its current situation, future opportunities, and ways to make it sustainable. The study evaluates tourism's contribution to Türkiye's economy, employment, and foreign exchange earnings. It also examines the sector's socio-cultural and environmental impacts. It addresses major challenges such as seasonal work, infrastructure deficiencies, low service quality, competition from other countries, and digital transformation. The study uses a literature review and SWOT analysis to examine reports, studies, and statistics. Data implies academic literature, official documents, and tourism statistics. The analysis highlights strengths like rich history and nature, weaknesses like inadequate planning, opportunities like new types of tourism, and threats like climate change. Results offer insights for better policies, such as spreading tourism into more areas and using green methods. This helps make tourism stronger and better for the long term.

Keywords: Tourism prospects, Sustainable development, SWOT analysis, Strategic directions, Economic impact, Environmental sustainability.

Jel kodu: L83, Z32, Q01, Q56

Türkiye Turizminin 2024 İtibariyle Değerlendirilmesi: Stratejik Yönelimler ve Sürdürülebilir Kalkınma

Öz

Bu çalışma, 2024 yılı itibarıyla Türk turizm sektörünü inceleyerek mevcut duruma, gelecekteki fırsatlara ve sürdürülebilirlik yollarına odaklanmaktadır. Amaç, turizmin Türkiye'nin ekonomisine, istihdamına ve döviz girdilerine nasıl katkı sağladığını analiz etmek, aynı zamanda toplum, kültür ve çevre üzerindeki etkilerini incelemektir. Çalışma, mevsimsel istihdam, yetersiz altyapı, düşük hizmet kalitesi, diğer ülkelerden gelen rekabet ve dijital dönüşüm gibi büyük sorunları ele almaktadır. Raporlar, çalışmalar ve istatistikleri incelemek için literatür taraması ve SWOT analizi kullanılmıştır. Veriler, akademik kaynaklardan, resmi belgelerden ve turizm istatistiklerinden elde edilmiştir. Analiz, zengin tarih ve doğa gibi güçlü yönleri, yetersiz planlama gibi zayıf yönleri, yeni turizm türleri gibi fırsatları ve iklim değişikliği gibi tehditleri işaret etmektedir. Sonuçlar, turizmi daha fazla alana yaymak ve yeşil yöntemler kullanmak gibi daha iyi politikalar için fikirler vermektedir. Bu, turizmi daha güçlü ve uzun vadede daha iyi hale getirmeye yardımcı olmaktadır.

Anahtar Kelimeler: Turizm potansiyelleri, Sürdürülebilir kalkınma, SWOT analizi, Stratejik yönelimler, Ekonomik etki, Çevresel sürdürülebilirlik.

Jel Code: L83, Z32, Q01, Q56

Makalenin Geçmişi:

Gönderim Tarihi : 27. 10.2025

Birinci Düzeltme : 16.11.2025

Kabul : 08.01.2026

Makale Türü : Araştırma Makalesi

Birkan, İ., & Toker, T.(2026). Assessment of Turkish Tourism as of 2024: Strategic Directions and Sustainable Development. *Turizm ve İşletme Bilimleri Dergisi*, 6 (1), 75-98

* This research does not require ethics committee approval.

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1. Introduction

The tourism sector has gained importance in the global economy and is considered one of the fundamental elements of economic development, especially for developing countries. Tourism revenues have strategic significance for a large number of countries due to their direct and indirect economic impacts. Türkiye, with its rich tourism potential and geographical advantages, stands out as a key beneficiary of this sector. In recent years, the growing share of these revenues has called the need to examine the sector's economic, socio-cultural, and environmental impacts more closely.

This study evaluates the current state and future opportunities of the Turkish tourism sector, including its contributions to the economy, employment, and foreign exchange earnings. It addresses the benefits for regional development and societal transformations, while framing the sector's role within a sustainable development perspective. The analysis also examines major challenges, such as seasonality, infrastructure deficiencies, service quality, international competition, and digital transformation, highlighting structural problems and offering strategic recommendations for resolution. Drawing on existing policies, global trends, and Türkiye's tourism strategy, the study explores essential future steps from a multifaceted viewpoint—one that considers not only economic contributions but also socio-cultural and environmental dynamics. Although extensive literature exists on Turkish tourism, most studies rely on pre-pandemic data or focus on single variables. This research aims to fill this gap. It provides a holistic analysis needed for 2024, a year marked by high inflation, regional competition, and the goals of the 2028 Tourism Master Plan. Ultimately, it aims to support the re-evaluation of Türkiye's tourism policies in a long-term sustainability framework and guide strategic actions ahead.

The methodology of this study is based on a literature review and SWOT analysis. Firstly, a comprehensive literature review was conducted by examining existing academic studies, reports, and statistics related to the tourism sector. Subsequently, the findings were analyzed and evaluated using SWOT analysis. Unlike existing studies, this one presents a strategic action plan for the sector following the SWOT analysis, offering a multifaceted view of the current situation, future potential, and emerging challenges in Turkish tourism.

2. Conceptual Framework

2.1. Economic Dimension of the Tourism Sector

• Contribution of Tourism Revenues to GDP

The tourism sector can be seen as a major catalyst for Türkiye's economy, supporting growth through substantial foreign exchange earnings, employment opportunities, and a strong multiplier effect (Tosun 1999; Pata & Balsalobre-Lorente 2022). This mirrors its broader global significance, where it accounted for 10.4% of world GDP in 2018 and remains a critical income source for many developing nations (Pata & Balsalobre-Lorente 2022, p. 13491).

This impact has expanded significantly, fueled by government incentives since the 1980s (Başer 2018). After a 17% revenue increase in 2019, the sector showed strong post-pandemic recovery (Gündüz 2024). In 2023, Türkiye hosted 54.3 million visitors, yielding \$49.5 billion in revenue (TÜİK 2024). Projections for 2024 are optimistic, forecasting 62.2 million visitors and \$61.1 billion, equivalent to 12% of the total economic impact on GDP (WTTC 2024, as cited in Turizm Radar 2025).

Despite this progress, studies indicate that Türkiye has yet to fully utilize its tourism potential due to ongoing structural issues, including short average tourist stays, revenue leakage to foreign investors, and benefits concentrated in coastal regions (Tosun 1999, p. 224; Tatoglu et al. 2002, pp. 82, 88; Okumuş et al. 2012, p. 653). Recent figures highlight these problems, with a 4.3% drop in per capita tourism revenue in early 2024 and an average daily expenditure of only \$97 (TÜRSAB 2024; TÜİK 2025). As a result, Türkiye's tourism revenue as a share of GDP trails behind competitors like Greece, Spain, and Portugal.

To address these challenges and stabilize income, diversification into areas such as health, rural, and cultural tourism is essential (Solarin et al. 2023; Kayral et al. 2023). The 88% growth in alternative sectors like health tourism in 2023, which generated over \$1 billion, demonstrates this potential. To reach the global top five in tourism revenue, Türkiye needs a long-term strategy. This requires combining public infrastructure investments with incentives for a skilled workforce and quality facilities. Ideally, all these efforts should follow sustainable development principles (Çetinel & Yolal 2009).

• Impacts on Employment

The tourism sector is recognized as a main pillar of employment in Türkiye, generating direct, indirect, and induced jobs that play a significant role in reducing unemployment and supporting economic success. Its labor-intensive structure offers essential opportunities, especially for young and low-skilled workers (Solarin et al. 2023; Tosun et al. 2006). Policies like the 1982 Tourism Incentive Law and subsequent liberalizations have driven investments—particularly in hotel development—directly boosting labor demand as bed capacity expands (Turgut et al. 2021; Karadaş 2020; Okuyucu 2013). By 2023, this had resulted in 1.06 million direct jobs, with the broader supply chain contributing over 3.2 million in total, and projections targeting 3.5 million by 2024 (WTTC 2024). Yet, these strong employment numbers conceal underlying structural flaws, including seasonality, low wages, lack of social security, harsh working conditions, and high turnover rates—with 68% of roles being seasonal in 2023 (Önder & Durgun Kaygısız 2008; Tosun 1999; Çetinel & Yolal 2009). To overcome these, a move toward year-round tourism is essential, emphasizing alternatives like yacht and ecotourism that require skilled labor and promote sustainable opportunities for local communities (Sarışık et al. 2011; Ünlü & Erbaş 2021, p. 147).

• Foreign Exchange Inflow and Balance of Payments

The tourism sector plays a positive role in Türkiye's balance of payments by generating foreign exchange inflows and helping to offset the country's chronic foreign trade and current account deficits (Akal 2009, pp. 135, 146, 147, 149; Küçükaltan & Terzioğlu 2013; Turgut et al. 2021; Kahveci 2023). The 1980s "Tourism Incentive Law" enhanced investments, boosting these revenues and elevating tourism's share in exports from 11.2% to 24.7% between 1980 and 2005 (Okuyucu 2013, p. 818). This growth extends beyond hotels to other areas, such as medical tourism, where Türkiye's strategic advantages—offering affordable healthcare compared to high-cost nations like the USA, Japan, and South Korea—create substantial foreign exchange potential (Büyük & Akkuş 2024, p. 1113; Görener 2016). However, challenges persist, including calculation methods and the misclassification of tourists' shopping expenses, which often appear as unexplained inflows in the balance of payments' net errors and omissions (Şahin 2022; Çıplak 2005). Exchange rate volatility further influences revenues, while heavy reliance on a few source countries and international tour operators threatens long-term sustainability (Tosun 1999, p. 243; Yıldırım & Keleş 2022, p. 163).

• Impacts on Regional Development

Tourism operates as a vital tool for regional development in Türkiye (Akal 2009), a point emphasized in the Türkiye Tourism Strategy, which seeks to extend tourism across all regions (Tokmak 2023, pp. 747, 749). The country's robust construction sector provides a key advantage for investors, enabling efficient use of technical infrastructure and skilled labor to optimize costs, even keeping hotel construction below European averages amid high inflation.

Tourism can drive economic and social progress in rural areas by spurring infrastructure investments and promoting alternatives like agro-tourism, cultural tourism, and ecotourism. These forms enhance economic diversity, boost local incomes, and elevate service quality (Önder & Durgun Kaygısız 2008, p. 367; Alaeddinoğlu & Can 2009, p. 511; Ünlü & Erbaş 2021, p. 147; Bal et al. 2016, p. 5). However, factors such as low added value, seasonal employment, and investment concentration in coastal regions hinder long-term benefits, leaving inland areas like Eastern and Southeastern Anatolia underdeveloped and increasing regional imbalances (Bal et al. 2016; Egresi et al. 2012; Çetinel & Yolal 2009, p. 45).

2.2. Socio-Cultural Impacts of the Tourism Sector

• Relationship between Cultural Heritage and Tourism

For sustainable tourism development in Türkiye, shifting beyond traditional 3S (sea, sand, sun) models is essential. The country's rich cultural heritage—encompassing legacies from civilizations like the Byzantine, Seljuk, and Ottoman—holds immense potential, with 7 UNESCO World Cultural Heritage sites and 68,095 registered cultural properties drawing visitors from Europe and beyond (Akal 2009, pp. 134-135; Yüksel & Yüksel 2001, p. 153). Regions such as Safranbolu, Şirince, and Ürgüp emerge as standout alternative destinations, though much of the archaeological potential remains untapped (Okuyucu 2013, p. 825).

Recent increases in institutional support and resources for archaeology mark a promising step forward. As of 2024, active excavation sites have risen to 144, with operations shifting from seasonal (3-4 months) to year-round (12 months) efforts (Kültür Varlıkları ve Müzeler G. Md. 2024). This approach is poised to uncover new discoveries, expand visitor areas, and broaden Turkish tourism both seasonally and geographically. Tourism acts as a vital mechanism for preserving and promoting cultural heritage, while enhancing Türkiye's global profile (Akbulut 2009; Ünlü & Erbaş 2021; Öztürk & Tuna 1999). Yet, rapid, and unplanned growth often causes environmental and social harm in historical areas, eroding local values and traditional lifestyles (Tatoglu et al. 2002, pp. 82, 83, 90, 97). Overall, efforts to protect and sustainably utilize these sites remain inadequate (Akova & Atsız 2019, pp. 260-261). Sustainable initiatives, such as the "Bir Gün Gel Misi Ol" project in Bursa's Misi Village that revives traditional crafts, and studies in Muğla demonstrating how heritage preservation drives demand, illustrate the benefits of integrated strategies (Guzeloglu & Gulc 2021, p. 61).

• Impacts on Local Communities

Culture Road Festivals hold a strategic place in Türkiye's tourism ecosystem, aiding destination diversification, and cultural tourism growth (Güçer 2024). Coordinated by the Ministry of Culture and Tourism, these events feed domestic tourism, promote cultural heritage, and generate economic opportunities for local communities—though they can also spark social changes (Yeşiltaş et al. 2010). As such, evaluating tourism investments' effects on locals requires balancing both positive and negative dimensions.

Overall, however, the sector's influence on communities has leaned negatively, particularly in coastal areas where investments fall short of addressing basic needs and local participation remains limited, undermining social sustainability. Tourism often alters lifestyles and economic structures, with perceptions varying by destination—for instance, while Safranbolu residents appreciate economic gains, they worry about social and environmental drawbacks (Çetinel & Yolal 2009, pp. 40, 42, 45, 46; Uslu et al. 2020; Türker 2013). To diminish this, destinations must incorporate sociological planning, especially as private-sector developments have encroached on local social spaces (Dinçer et al. 2015; Kervankıran & Bağmancı 2021, pp. 284-285).

2.3. Environmental Sustainability and Tourism

• Environmental Impacts and Conservation Policies

While rapid growth in Türkiye's tourism sector has sparked debates about overtourism, the country's vast 783,562 square kilometers and low tourist density of 78 per square kilometer—far below figures in established markets like Italy (195), Spain (180), and France (199)—suggest a relatively sustainable carrying capacity (Turizm Gazetesi 2024). That said, tourism can still strain environmental sustainability by overtaxing natural resources (Pata & Balsalobre-Lorente 2022). Unplanned development, particularly along coasts, causes degradation and disrupts ecosystems, such as sea turtle life cycles affected by haphazard hotel and second-home construction (Dede & Ayten 2012, p. 437). Critics argue that Türkiye's 2023 Tourism Strategy Plan lacks depth in addressing environmental risks, resource protection, and overall sustainability (Aygün & Baycan 2020, p. 59). In response, Türkiye is advancing green practices to minimize these impacts and appeal to eco-conscious visitors (Taşkın et al. 2024, p. 5). Ecotourism, for instance, supports conservation through low-impact activities that sustain ecosystems (Ünlü & Erbaş 2021, p. 148). Building on this, the 2028 Tourism Master Plan seeks to enhance the sector's environmental performance and enhance truly sustainable tourism (World Economic Forum 2023).

• Sustainable Tourism Practices

Global warming significantly influences Türkiye's tourism sector by raising summer temperatures, yet it also creates opportunities like extended seasons that demand refreshed marketing strategies (GM Dergi 2024). To adapt, national tourism plans must prioritize sustainability—integrating these principles into the Türkiye Tourism Strategy and aligning with EU accession policies for greater environmental compliance (Akbaş & Mutlu 2016; Tokmak 2023).

At the regional level, sustainable planning is vital to curb unplanned urbanization, as seen in initiatives like the Eastern Anatolia Tourism Development Project (which designated Çoruh Valley a "cittaslow" in 2016) and GIS-based assessments in areas such as Çeşme, Uzundere, and the Western Black Sea, all of which stress local involvement and ecological awareness (GM Dergi 2024; Guzeloglu & Gulc 2021, p. 60; Bozdağ 2023, pp. 9884, 9898; Özgeriş & Karahan 2021). Ultimately, these approaches reduce environmental harm while delivering economic and social advantages through diverse practices, including agro-tourism, medical tourism, and youth-oriented programs (Alaeddinoğlu & Can 2009; Egresi et al. 2012; Okumuş et al. 2012; Kayral et al. 2023; Büyük & Akkuş 2024; Görener 2016).

• Environmental Risk Management

The tourism industry's sustainability faces global threats like climate change and warming, with the Eastern Mediterranean basin—home to Türkiye—proving especially vulnerable. Among the critical risks, water resource management stands out, as high summer demand creates capacity strains in tourist areas. With consumption often surpassing 850 liters per person daily in coastal spots, collaborative public-private efforts for alternatives like seawater desalination are essential. Despite ranking in the global top 10 for tourist numbers and revenue, Türkiye's sustainability score has hovered in the 40s, improving only to 29th in 2024—still short of what's needed to meet sector goals. The industry remains highly vulnerable to crises at both macro and micro levels, from geopolitical tensions and terrorism to pandemics, economic instability, and security perceptions. To boost global competitiveness, Türkiye must transition from reactive crisis handling to proactive risk management, including comprehensive assessments to overhaul security standards. The massive hotel fire in Bolu Kartalkaya—one of the world's five largest (Çavdar 2024)—highlighted these gaps. Ultimately, as tourism drives macroeconomic stability, robust crisis-prevention strategies are crucial for long-term viability.

2.4. Strategic Analysis of the Turkish Tourism Sector

• SWOT Analysis Findings

The average expenditure per tourist per night—a key metric for sector performance—rose from \$65 in 2017 to \$99 in 2023 for foreign visitors in Türkiye, signaling qualitative progress. Yet, while the country ranks in the top six globally for visitor numbers, its 25th place in per capita revenue highlights areas needing deeper scrutiny (GM Dergi 2024). The COVID-19 pandemic has amplified spatial growth challenges worldwide, highlighting the value of strategic planning to build resilience against crises (Kervankıran & Bağmancı 2021, pp. 282, 285).

In this situation, Türkiye's strengths lie in its abundant cultural and natural heritage, contrasted by weaknesses such as environmental degradation, unplanned development, and infrastructure gaps (Akal 2009; Okumuş et al. 2012; Tosun et al. 2006). Opportunities include expanding alternative tourism, diversifying markets, and leveraging post-pandemic recovery, while threats encompass fierce international competition, geopolitical tensions, and climate change (Alaeddinoğlu & Can 2009; Tosun et al. 2006; Kayral et al. 2023; Aygün & Baycan 2020, p. 58; Dinçer et al. 2015; Okuyucu 2013; Taşkın et al. 2024, p. 8; Yücenur 2017, p. 919). Blending these SWOT insights with expenditure trends and global shifts can strengthen overall competitiveness.

• Competitiveness Analysis

Branding plays a central role in securing sustainable competitive edges in tourism. While international chain hotels are expanding rapidly in Türkiye (Turizm Ekstra 2024), investors often face operational and financial risks due to inexperience and inadequate consulting—emphasizing the need for independent advisory services.

Türkiye is an expert country in 3S (sea, sand, sun) tourism and can strengthen its edge by capitalizing on cultural heritage and historical assets. Embracing “complementary tourism” over “alternative” models allow integration of diverse offerings without ignoring 3S strengths. Globally, competitiveness hinges on infrastructure, service quality, seasonality, and pricing, which can be enhanced through diversified

investments, quality-focused approaches, targeting high-spending visitors, and mid-scale hotel developments that support local economies (Önder & Durgun Kaygısız 2008, p. 368; Okuyucu 2013; Küçükaltan & Terzioğlu 2013; Çetinel & Yolal 2009, p. 44). In the European market, Türkiye's historical and cultural richness provides a solid foundation, though refined promotion and marketing are essential. Aggressive expansion in yacht tourism (Sarışik et al. 2011), along with niche marketing and product differentiation (Duman & Kozak 2010), can further drive gains. In medical tourism, advantages like geographical positioning, affordable care, short wait times, and advanced facilities—such as knee replacements costing far less than in the USA or UK—offer a strong international foothold (Büyük & Akkuş 2024, p. 1123; Görener 2016, pp. 160, 166). By capitalizing these strengths, especially in medical tourism, Türkiye can solidify its global standing through ongoing branding efforts, infrastructure upgrades, and product variety.

• Market Positioning

In Türkiye's tourism statistics are heavily influenced by visits from Turkish expatriates and shopping-focused travelers from neighboring countries, which pull down per capita revenue figures. Even so, by late 2024, the country had climbed to a leading spot in the global market with 61 million visitors and \$61.103 billion in revenue (Turizm Günlüğü 2024). Istanbul's status as the world's most visited city and Antalya's top 10 ranking focuses this achievement, as Türkiye sets its sights on joining the top five nations in tourism. Targeting markets like Korea and Canada (Alaeddinoğlu & Can 2009, p. 524), while nurturing niches such as cultural, religious, and rural tourism, can stimulate local economies and drive resilience against external disruptions (Okumuş et al. 2012; Egresi et al. 2012; Solarin et al. 2023). In medical tourism, providing affordable, high-quality services offers a key edge (Büyük & Akkuş 2024, p. 1113). To build on this, shifting away from over-reliance on coastal tourism through sustainability-driven policies, branding, targeted promotion, and broader diversification is essential (Akbulut 2009, p. 218; Akbaş & Mutlu 2016, pp. 124, 134; Tokmak 2023, pp. 749-750).

These insights suggest that unlocking Türkiye's full tourism potential demands precise statistical analysis and robust market positioning via niche development and sustainable practices, thereby elevating its international profile.

• Future Projections

Türkiye's 2028 Tourism Master Plan aims to increase the tourism sector's competitiveness and sustainable development, recommending the use of innovative tools such as big data analytics to measure and manage the economic, social, and environmental impacts of tourism (World Economic Forum 2023; Türkiye Turizm Tanıtım ve Geliştirme Ajansı 2022). The current two million bed capacity of the Turkish tourism sector (Güçer 2025) is insufficient to meet increasing demand; considering seasonal concentration and high occupancy rates, increasing bed capacity stands out as a sectoral necessity.

From a regional competition perspective, Saudi Arabia's planned investments of 800 billion USD for faith, culture, and entertainment tourism within its post-oil economy strategy (Saudi Press Agency 2025) and the United Arab Emirates' planned investments of 354 billion USD until 2031 (Nagraj 2024; Kawach 2024) intensify regional competition. Current macroeconomic conditions and high interest rates deepen the structural problems faced by the Turkish tourism sector regarding investment financing, making the development of access to finance critically important for the sector's sustainable growth.

2.5. Institutional Structure and Policy Framework

• Tourism Policies and Strategies

Though tourism drives substantial economic growth in Türkiye, a clear mismatch exists between its strategic value and public backing. The Tourism Incentive Law falls short of addressing modern sector needs, while the Ministry of Culture and Tourism's budget share remains under 0.5% of the central government's total. For 2024, the 53.2 billion TL allocation grew by just 36%, trailing inflation trends (Turizm Günlüğü 2024). Initiatives like the "Go Türkiye" website and the "Safe Tourism Certification Program (STCP)" provided crucial support during the COVID-19 pandemic (Taşkın et al. 2024; Karadaş 2020). However, the centralized policy framework limits local sustainable practices, compounded by flawed revenue calculation methods that obscure the sector's true economic value (Alaeddinoğlu & Can 2009; Okumuş et al. 2012; Çetinel & Yolal 2009). This labor-intensive industry, reliant on high domestic inputs, also grapples with profitability challenges from 84% sectoral inflation, exchange rate volatility, and inadequate attention to climate change impacts (Kuk 2024; Aygün & Baycan 2020, p. 49). To advance, the Tourism Promotion and Development Agency's (TGA) 2024 revenue of about 5 billion TL should scale with sector expansion and dedicate funds solely to tourism initiatives (Turizm Güncel 2024). Stabilizing inflation and exchange rates, while aligning policies with EU standards, will be key to boost competitiveness and long-term viability (Döşkaya 2024; GM Dergi 2024; Yıldırım & Keleş 2022, p. 162).

• Legal Regulations

Although the concept of sustainability has begun to be integrated into tourism policies in Türkiye, it is stated that the legal regulations made in this regard are insufficient and various problems are encountered in practice (Dede & Ayten 2012, p. 437). While it is emphasized that local governments should be given more authority for the development of social tourism practices, the central government's limited support in this area emerges as a factor hindering the development of social tourism (Duymaz & Temizel 2022, p. 229).

For the development and effective management of archaeological tourism (comprehensive projects such as expanding excavation sites, year-round sustainable work, restoration activities, modernization of museums, and return of historical artifacts illegally removed from Türkiye), the integrated structure of the Ministry of Culture and Tourism is of strategic importance. Current discussions regarding the separation of the institutional structure of the ministry, which has undergone merger and separation processes in three different periods throughout history, pose a risk, especially in terms of the necessity of managing cultural tourism policies with a holistic approach. Therefore, maintaining the existing integrated structure is critically important for sustainable cultural tourism strategies.

• Institutional Actors and Their Roles

While Türkiye boasts a wide institutional network for tourism education, it often falls short of sector demands, making practical training and industry collaborations essential. Foreign language skills are vital, with curricula needing to incorporate not just English but also key languages like Russian, Chinese, and Arabic for target markets. Recent accreditation pushes and a growing focus on English—supported by the 2024 Ministry of Culture and Tourism-YÖK protocol for full-English programs—represent encouraging steps toward boosting international competitiveness (Turizm Güncel 2024).

The Turkish Tourism Promotion and Development Agency (TGA), founded in 2019, has effectively managed its budget to enhance tourism outcomes, even as rivals adopted similar models earlier. With digitalization diminishing the role of traditional fairs, TGA's emphasis on online platforms and innovative technologies is strategically vital (Güneli 2024). Meanwhile, Turkish Airlines (THY) has achieved steady expansion over the past two decades, emerging as a major global aviation force with 330 direct destinations that strategically support Turkish tourism. New routes have driven notable surges in visitor numbers, and THY's ongoing growth is poised to further propel the sector's advancement.

Considering these evaluations, strengthening institutional structures, and aligning tourism policies with THY's growth strategy will contribute to the sector's sustainable growth.

2.6. Current Trends and Future Perspectives

• Digital Transformation and Technological Developments

Digital transformation and emerging technologies are reshaping the tourism sector profoundly. The Russia-Ukraine war and related sanctions have strained Türkiye's revenues from Russian and Ukrainian markets, yet visitor numbers from these areas have held steady—a trend that could surge with any peace progress. In response, adopting alternative payment systems and digital currencies is strategically vital to navigate financial barriers (Dünya Gazetesi 2024).

Research highlights digitalization's role in promoting destinations and enhancing customer experiences, urging its deeper integration into Türkiye's strategies (Kayral et al. 2023; Niñerola et al. 2019; Aygün & Baycan 2020, p. 55). Tools like big data analytics help track economic, social, and environmental effects for better policy decisions (World Economic Forum 2023), while GIS supports sustainable planning by assessing impacts (Bozdağ 2023, pp. 9885-9886). Leveraging information technologies and social media can accelerate this shift, boosting Türkiye's appeal to international tourists—particularly in medical tourism, where platforms aid patient attraction and marketing (Yücenur 2017, p. 920; Görener 2016, p. 167). Digital tools are equally crucial in tourism education, driving innovations in teaching and operations (Yeşiltaş et al. 2010; Uzun 2020). The COVID-19 era accelerated this, as seen in initiatives like the “Go Türkiye” platform for promotion (Kahveci 2023, p. 1588). Ultimately, using these technologies effectively will enhance the sector's sustainability and global edge.

• New Tourism Types

To achieve sustainability in Türkiye's tourism sector, there is a strong push to diversify beyond traditional models, though cultural tourism has faced hurdles in promotion and management (Okumuş et al. 2012). This has led to a focus on alternatives like religious, rural, eco-, gastronomy, and health tourism, which prioritize eco-friendly practices to safeguard natural and cultural assets, unlock economic opportunities in varied locales, and involve local communities—often enhancing rather than replacing “sun, sea, and sand” offerings (Egresi et al. 2012; Özgeriş & Karahan 2021; Ünlü & Erbaş 2021; Okumuş et al. 2012).

Such efforts target niche markets and regional expansion, aiming for year-round activities across areas like the Western Black Sea's ecotourism (Kişi 2019, p. 5) and yacht tourism's appeal to nature and adventure seekers (Sarışık et al. 2011). Community-led initiatives, such as the “Bir Gün Gel Misi Ol” project, further demonstrate how local involvement can cultivate these options (Guzeloglu & Gulc 2021, p. 61). Health tourism is recognized as a prime success, fueled by Türkiye's prime location, cultural draws, innovative

facilities, and cost advantages (Kuzhan & Gönen 2024; Büyük & Akkuş 2024). Ranking 7th globally with 40 accredited institutions, it draws patients mainly from the Middle East, Germany, the UK, Russia, and Central Asia. In 2023, 1.4 million health tourists generated \$2.3 billion in exports, up from \$1.9 billion in 2022 (T.C. Ministry of Trade 2024). Yet, this expansion carries risks, as seen in the 2023 “newborn gang” scandal that tarnished health tourism’s reputation and highlighted the need for rigorous regulations (Gök 2025). Proper oversight of these emerging forms is thus critical to maintain credibility and ensuring enduring, sustainable progress.

3. Methodology

This study adopts a qualitative approach, leveraging SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis to assess the Turkish tourism sector’s current landscape and chart its strategic path forward. As a proven strategic tool, SWOT offers a structured way to evaluate internal and external factors, pinpoint competitive edges and vulnerabilities, uncover growth prospects, and overcome risks (Özdemir et al. 2009; Sormaz et al. 2023).

The research draws on a diverse array of secondary data, including academic studies, sector reports, tourism policies, sustainability reports, statistical data, official documents, and sectoral analyses from credible sources (Yıldırım & Şimşek 2021). Data selection prioritized comprehensive coverage of the sector’s economic, social, cultural, and environmental aspects to ensure a reliable, well-rounded analysis. The assembled data were then synthesized into a SWOT matrix through a process of summarization, consistency checks, classification into the four categories, prioritization based on sectoral impact (informed by an extensive literature review), and interpretation to reveal strategic insights. These findings underpin recommendations aimed at supplying with competitiveness, promoting sustainability, and addressing risks, providing a practical framework for future decision-making in Turkish tourism.

3.1. SWOT Analysis Process

1. Identification of Internal Factors (Strengths and Weaknesses):

The strengths (e.g., natural, and cultural riches) and weaknesses (e.g., infrastructure deficiencies) of the Turkish tourism sector were identified. This analysis was based on sectoral reports and a literature review.

2. Identification of External Factors (Opportunities and Threats):

Opportunities (e.g., digitalization and new tourism trends) and threats (e.g., economic fluctuations and environmental risks) that the sector may face were evaluated. At this stage, national and international reports and academic studies were examined.

3. Creation of SWOT Matrix:

Strengths, weaknesses, opportunities, and threats were brought together in a matrix to develop strategic recommendations. In this process, a matrix format was used for the visualization of the SWOT analysis (Özdemir et al. 2009, p. 4).

3.2. SWOT Analysis Findings

Strengths

- **Core Tourism Assets:** Rich history, culture, natural beauty, favorable climate conditions, diverse tourism opportunities, geographical location.
- **Human Resources:** Young workforce that can be directed to tourism, hospitality.
- **Promotion and Transportation:** High recognition, rich transportation opportunities, attractive alternative for distant markets.
- **Market Dynamics:** Activity in domestic tourism, investors' interest in tourism, adaptability to demand structure.
- **Developing Tourism Types:** Winter tourism investments, youth, thermal and health tourism, yacht tourism.
- **Sustainability and Performance:** Sustainability principles, increasing expenditure per tourist.
- **Planning and Analysis:** Tourism master plan, big data analytics.
- **Economic Contribution and Support:** Economic contribution, support programs.
- **Education and Digitalization:** Broad institutional network, positive developments, role of digital platforms.
- **Innovation and Strategy:** Innovative practices, strategic moves.

Weaknesses

- **Inadequate Management and Policy:** Insufficient interest from administrations, inability to formulate tourism policy, complexity of authority, councils that have not gained functionality, lack of participation in decision-making mechanisms.
- **Workforce and Education Deficiencies:** Shortage of qualified personnel, insufficient vocational certification, lack of public education on tourism.
- **Spatial and Type Concentration:** Concentration in certain geographical regions and tourism types, unbalanced marina distribution.
- **Economic and Environmental Problems:** Informal economy, irregular and distorted urbanization, untapped renewable energy potential, inadequate solid waste recycling.
- **Infrastructure and Environmental Awareness:** Insufficient infrastructure against rapid demand increase, hotels incompatible with environment and local architecture, insufficiently protected historical and natural heritage, inadequate environmental awareness, misunderstood urban landscape concept.
- **Marketing and Promotion:** Marketing and promotion resources that cannot be used in coordination, ineffective use of social media.
- **Security and Standards:** Inadequate security standards, incompatibility of tourism documents containing different standards.

Opportunities

- **Increasing Tourism Interest:** Increasing interest in congress, health, and cultural tourism, increasing global interest in tourism, increasing number of conscious tourists, increasing interest in the Eastern Mediterranean, increasing global interest in Türkiye.
- **Transportation and Technology:** Easier and cheaper transportation, cheap airline opportunities in domestic tourism, developments in information and communication technologies, presence of expert travel organizers.
- **Market and Cooperation:** Increasing importance of relations with Eurasian and Gulf countries, visa waiver with some countries, support for regional development with national and international funded projects.
- **Tourism Diversity:** Cruise tourism starting in the Black Sea, increasing congress tourism investments.
- **Promotion and Events:** Increased promotion through cultural and artistic activities, opportunities to organize major sports events, high social media usage.
- **Sustainability and Management:** Proactive risk management, local participation, and alternative tourism.
- **Economy and Competition:** Access to finance, compliance with EU, regional competition.
- **COVID-19:** Post-COVID-19 recovery.
- **Education and Workforce:** Applied education models, language proficiency.
- **Payment Systems and Marketing:** Alternative payment systems, social media usage.

Threats

- **Competition:** Increasing competitiveness of rival EU member countries, developing competitiveness of rival countries, increasing competition from other destinations, large investments by Saudi Arabia and UAE.
- **Image and Security:** Negative media coverage, image problem, external threats due to Türkiye's geopolitical location, political and economic instability, terrorism.
- **Environmental Problems:** Environmental pollution, global warming, changing climate conditions, pollution of open seas by ship waste, disruption of the conservation-utilization balance.
- **Economic and Marketing:** Prices determined by international travel organizers, slow EU accession process, tourism investments made unconsciously damaging natural structure, profitability problems, macroeconomic conditions.
- **Regional and Structural Problems:** Regional security problems, unplanned increase in marina numbers, distorted urbanization.
- **Crises and Risks:** Pandemic diseases, environmental and socio-economic risks, climate change.
- **Digitalization and Competition:** Competition in digital transformation.

Table 1. SWOT Analysis Findings

Internal Environment Analysis	External Environment Analysis
Strengths	Opportunities
<ol style="list-style-type: none"> 1. Rich history and culture, natural beauties 2. Young workforce and hospitality 3. High recognition and transportation facilities 4. Enhancements in domestic tourism 5. Sustainability principles 6. Developing tourism types (winter, health, yacht) 	<ol style="list-style-type: none"> 1. Increasing tourism interest (congress, health, culture) 2. Easier and cheaper transportation 3. Increasing relations with Eurasia 4. Cruise and congress tourism investments 5. Increased promotion through cultural events 6. Cruise tourism investments 7. Proactive risk management 8. Post-COVID-19 recovery
Weaknesses	Threats
<ol style="list-style-type: none"> 1. Inadequate management and policy 2. Lack of qualified personnel 3. Economic and environmental problems 4. Infrastructure deficiencies 5. Inadequate security standards 6. Marketing and promotion deficiencies 	<ol style="list-style-type: none"> 1. Competitiveness of rival EU member countries 2. Negative media coverage and image problems 3. Environmental pollution and global warming 4. Prices determined by international organizers 5. Regional security problems

Source: Adapted from the study's findings.

Table 2: SWOT Matrix Strategy Components

SWOT Matrix Strategy Components		Internal Environment Factors	
		S	W
O	Increasing tourism interest (congress, health, Easier and more affordable transportation Growing relations with Eurasia Cruise and congress tourism investments Increased promotion through cultural events Proactive risk management	Rich history and culture, natural beauty Young workforce and hospitality High recognition and accessibility (or transportation facilities) Mobility in domestic tourism Sustainability principles Developing tourism types (winter, health, yachting)	Inadequate management and policy Lack of qualified personnel Economic and environmental issues Infrastructure deficiencies Insufficient security standards
		SO Strategy: Combining Strengths with Opportunities Increasing the promotion of cultural and historical assets Improving transportation services by utilizing the young workforce Opening up to new markets by developing transportation infrastructure Organizing events to boost domestic tourism Developing sustainable tourism projects Developing proactive strategies for new tourism types	WO Strategy: Combining Weaknesses with Opportunities Utilizing external resources to improve management processes Training qualified personnel through educational programs Directing investments to resolve economic issues Establishing partnerships to strengthen infrastructure Developing new policies to enhance security standards
T	Competitiveness of rival EU member countries Negative media coverage and image issues Environmental pollution and global warming Prices determined by international organizers Regional security problems	ST Strategy: Addressing Threats with Strengths Gaining a competitive advantage by highlighting historical and cultural heritage Organizing positive promotional campaigns using the young workforce Emphasizing sustainability principles Ensuring price competitiveness by increasing domestic tourism activity Enhancing security through sustainable projects	Weaknesses Reducing competition by strengthening the management structure Improving the image through education and awareness projects Developing projects aimed at resolving environmental issues Increasing competitiveness by boosting infrastructure investments Mitigating threats by strengthening security standards

Source: Own findings of the study, table adapted from; (Özdemir et al. 2009, p. 7)

4. Discussion and Recommendations

This analysis synthesizes Türkiye's internal strengths and weaknesses with external opportunities and threats to formulate strategic recommendations for the tourism sector. Internally, the nation's primary strengths are its rich historical, cultural, and natural assets, complemented by a dynamic young workforce and a culture of hospitality. These are counteracted, however, by significant weaknesses, including inadequate management, infrastructure deficiencies, and a persistent shortage of qualified personnel. Externally, the sector is presented with clear opportunities, including growing global interest in niche markets like congress, health, and cultural tourism, alongside easier and more affordable transportation links. These prospects are challenged by significant threats, notably intense competition from EU member countries, the risk of negative media coverage, and pressing environmental concerns.

Based on this analysis, a multi-pronged strategic approach is recommended. First, to leverage strengths against opportunities (S-O Strategy), Türkiye should intensify the promotion of its unique cultural assets through targeted digital marketing, social media campaigns, and the development of local festivals. This approach can also help the young workforce to improve tourism-related services and support new infrastructure projects. Second, to overcome weaknesses to seize opportunities (W-O Strategy), targeted investment and strategic partnerships are essential. This includes utilizing external expertise to modernize management processes and implementing robust training programs to develop the qualified personnel needed to lead new tourism ventures. Directing investment toward resolving known infrastructure gaps is critical for unlocking further growth. Finally, a defensive strategy is necessary to moderate threats (S-T & W-T Strategies). To counter negative publicity and competition, Türkiye can deploy its strengths—namely its hospitality culture and unique attractions—in proactive, positive marketing campaigns that emphasize sustainability and security. Simultaneously, it is imperative to address core weaknesses by strengthening management structures, improving professional education, and implementing transparent environmental standards. These internal improvements are the most effective defense against external threats and are fundamental to building a resilient and competitive tourism sector.

Table 3: Strategic Action Plan Table

Strategy Component	Objective	Actions	Observation and Evaluation Criteria
Combining Strengths with Opportunities	Increasing the promotion of cultural and historical assets	Organizing promotional campaigns	Increase in visitor numbers, media coverage
		Developing social media strategies	Social media engagement
		Arranging local festivals	Participation rates, feedback
	Improving transportation services	Recruiting young workforce	Employee satisfaction, service quality
		Developing transportation infrastructure projects	Project completion rate, user feedback
Improving Weaknesses with Opportunities	Expanding into new markets	Conducting target market analysis	Target market size, market penetration
	Improving management processes	Utilizing external resources	Process efficiency, cost savings
		Organizing training programs	Number of participants, post-training performance evaluation
	Resolving economic difficulties	Directing investments	Return on investment, economic growth rates
	Establishing partnerships to strengthen infrastructure	Collaborating with local businesses	Number of partnerships, project success rate
		Developing new security policies	Security reports, customer feedback
	Enhancing security standards	Developing promotional strategies	Market share, competitor analysis
	Gaining a competitive advantage	Leveraging the young workforce	Media visibility, brand perception
	Addressing Threats with Strengths	Organizing positive promotional campaigns	Project effectiveness, environmental impact reports
		Emphasizing sustainability principles	Developing environmental projects
Protecting Against Threats by Addressing Weaknesses	Strengthening the management structure	Organizing management development programs	Management satisfaction, employee turnover rate
	Improving the image	Implementing education and awareness projects	Media reports, public perception
	Resolving environmental issues	Initiating environmental improvement projects	Environmental impact assessments, community feedback
		Increasing competitiveness	Increasing infrastructure investments
	Strengthening security standards	Organizing security training and audits	Security incidents, customer satisfaction

Source: Own findings of the study

4.1. Conclusion

This study aimed to conduct a strategic analysis of the Turkish tourism sector by addressing its economic, socio-cultural, and environmental dimensions. Tourism is a significant sector globally and in Türkiye, supporting economic growth through foreign exchange earnings, employment creation, and enhanced intercultural interaction—particularly aiding development in countries like Türkiye while boosting national income and the country's image. From a theoretical perspective, this study contributes to the tourism management literature by showing that economic indicators alone are insufficient for analyzing tourism resilience in emerging markets; instead, a synthesis of socio-cultural and environmental sustainability metrics is required to understand long-term sectoral survival.

However, for the sector's sustainability and increased competitiveness, it is essential to manage environmental impacts, protect cultural heritage, and ensure the well-being of local communities. In this case, tourism policies and strategies must promote sustainable practices, with legal regulations supporting environmental protection and institutional actors coordinating effectively. In terms of managerial implications, these findings suggest that policymakers must urgently shift their focus from mass tourism to high-value niche markets to lessen seasonality. Also, decision makers should prioritize investing in big data analytics for proactive risk management rather than solely for marketing.

Current trends such as digital transformation, new tourism types, and changing tourist profiles are key factors that will shape the future of the sector. Therefore, the Turkish tourism sector needs to adapt to these trends, follow technological developments, and develop innovative approaches. Projections for 2024 and beyond indicate that the sector's growth potential continues. However, factors such as global economic uncertainties, political risks, and environmental issues also bring challenges for the sector. Thus, strategic planning should account for these risks by adopting a flexible, adaptable approach aligned with sustainable development principles. The study can be beneficial to businesses operating in the tourism sector, public institutions that determine tourism policies, academics conducting research in tourism, and all stakeholders interested in the future of the tourism sector. The main limitation of the study is its heavy reliance on literature and content analysis. In future studies, a more comprehensive analysis could be conducted by gathering opinions from distinct groups of stakeholders in the Turkish tourism sector, such as ministry representatives, academics, sector professionals, and central administration officials, to deepen understanding of the sector's problems and proposed solutions.

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Funding Information: No financial or support received from any individual or institution during the preparation of this study.

Conflict of Interest: The authors declare no conflict of interest.

Ethical Declaration: The authors confirm that ethical rules were followed during all stages of this study. The *Turizm ve İşletme Bilimleri Dergisi* assumes no responsibility for any ethical violations; sole responsibility lies with the author(s).

Informed Consent Statement: Not applicable. This study does not involve human participants.

Author Contributions: I. author 50%, II. author 50%.

Ethics Committee Approval: Not applicable. This study does not require ethical approval as it involves theoretical analysis and does not involve human subjects.

Extensive Summary

Assessment of Turkish Tourism as of 2024: Strategic Directions and Sustainable Development

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The tourism sector acts as a fundamental pillar of the Turkish economy, standing as a primary driver for foreign exchange earnings and employment. As the industry moves past the post-pandemic recovery, it faces a unique conjuncture in 2024 characterized by high inflation, intense regional competition, and the ambitious targets of the 2028 Tourism Master Plan. This study conducts a holistic strategic analysis to understand how Türkiye can navigate these challenges. By utilizing a qualitative methodology based on a comprehensive literature review and SWOT analysis, the research evaluates the current economic, socio-cultural, and environmental landscape. The primary goal is to go beyond simple economic metrics and address structural problems—such as seasonality and infrastructure gaps—that hinder the sector's full potential.

Economic findings show a robust but uneven recovery. Türkiye successfully generated \$49.5 billion in revenue in 2023, with visitor numbers exceeding 54 million. However, heavy dependence on the “3S” model concentrates wealth in coastal regions and worsens seasonality, limiting employment quality and job security. While Türkiye ranks highly in visitor numbers, it falls behind competitors like Spain and Greece in revenue per tourist. High-value niches, particularly health tourism—which generated over \$2.3 billion in 2023—offer a viable path to fixing these flaws, yet the sector remains vulnerable to external shocks. On the socio-cultural front, a critical tension exists between growth and sustainability. While Türkiye possesses immense competitive advantages through its historical heritage, rapid and unplanned urbanization threatens these assets and strains local infrastructure. Furthermore, environmental risks like water scarcity and climate change in the Mediterranean basin are now immediate operational concerns rather than distant threats.

The strategic analysis shows that Türkiye cannot rely solely on its traditional strengths. The SWOT analysis highlights emerging threats from regional rivals, specifically massive investments by Saudi Arabia and the UAE, which challenge Türkiye's market share. To counter this, the study recommends a decisive shift toward “complementary tourism” that integrates rural and cultural experiences with standard holiday packages. This involves aggressive digital transformation, utilizing big data not just for promotion, but to manage visitor flows and reduce overtourism.

Overall, achieving the goals of the 2028 Master Plan requires a fundamental change in policy perspective. The focus must shift from quantity to quality by prioritizing vocational training, enforcing stricter environmental standards, and diversifying into year-round activities. By balancing economic targets with social and environmental responsibilities, the sector can build the resilience needed to survive in an increasingly competitive global market.

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