MARKETING TURKEY AS A TOURIST DESTINATION IN THE UNITED KINGDOM

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ABSTRACT

The general purposes of this study were to examine the British tour operator's familiarity with Turkey and analyse what image and expectations British tourists have about Turkey as a tourist destination, as well as their experience and satisfaction with the country.

Two studies were conducted in order to test hypotheses. The first study was on British tour operating companies offering Turkey as a tourist destination in the UK. The second study was applied over a three-month period in Turkey on British tourists returning from Turkey.

The majority of the tour operators are familiar with Turkey as a tourist destination, which is perceived as a destination to be visited mainly for its good weather together with value for money and the historic attractions.

Generally, British tourists expressed high degrees of satisfaction with their holiday experience in Turkey. They were satisfied with most services offered, attractions visited and prices paid.

"Good weather" " warm, friendly people" "plenty to do and see" were ranked as the three most important reasons and expectations for travelling to Turkey. British tourists mainly viewed Turkey as a sun, sea and sand destination. However, "to visit a newly fashionable destination" seemed to be of no importance for the British tourist.

Overall, this research has provided some perspectives for understanding tourism marketing issues. It is expected that this study can provide useful reference for Turkey in its effort of marketing tourism. The study provides useful empirical data and information that enable the marketers of Turkey to see certain areas for feasible improvement in order to maintain and/or increase their customers' satisfaction.

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Chapter One

General Introduction

INTRODUCTION

The purpose of this chapter is to provide a general introduction to the current study. Firstly, the chapter starts with a background, then the chapter explains the purposes of the study. The significance of the study, research hypotheses and methodology will be examined. Finally the chapter ends with a brief outline of the whole thesis.

BACKGROUND OF THE STUDY

Tourism has become a world-wide phenomenon. Today, millions of trips are made every year for a wide range of purposes, such as holiday, business, meeting, religious, visiting friends and relatives, and others. Many such trips involve the crossing of international borders. In 1995 there were 567 million international tourist trips made world-wide (WTO, 1996). According to the E.I.U. special report this figure will reach 617.2 million trips, excluding day trips by the years 2000 (Edwards, 1992).

It is widely agreed that the impacts of tourism on economic and social development are so significant that many developed and developing countries in the world today are increasing their efforts to encourage the growth of tourism. It is generally recognised that the development of tourism can increase national income, create more job opportunities, improve regional economies and develop natural and cultural resources.

Marketing in tourism according to WTO (1993) is the process by which the destination and tourist enterprises sell their products and services to potential customers. Therefore, promotion is one part of the marketing mix which has an objective to recommend or introduce a product to the market; hence the products have to be communicated to the customers.

Moreover, marketing in the tourism sector is connected to the country's general image abroad. The image of the destination is actually part of the product (Getz, 1991), and therefore much of the work needed to create positive image is promotional. So at this point the country has to examine some practical ways in which promotions can help create the desired image. In these context tour operators play a very important role, since growth in the overseas holiday market is primarily a function of the marketing efforts of tour operators (Buck, 1988).

Tourism marketing for the developing counties is an important aspect in promoting and selling the tourist products. The developing counties are suffering from a number of tourism problems, the most important of which is the difficulty in marketing the tourist product to the consumer. This may be due to the lack of expertise and funds allocated for the purpose of marketing, as well as inadequate distribution systems suitable enough for this purpose. i.e. selling the product in the main tourist markets.

Around the world there are some 175 National Tourist Organisations (NTO) of different sizes and organisational patterns (Middleton, 1994) and all of them have been trying to attract visitors to their countries. Therefore, countries who are involved in tourism should determine why visitors come, and what they like about the destination, what they do not like. This is important for effective marketing.

TOURISM POTENTIAL OF TURKEY

Turkey has an exceptional wealth of tourism assets which compare favourably with those of competing countries in the Mediterranean region and elsewhere. Its natural attractions include a vast, varied and unspoilt landscape with forests, rivers and mountains as well as an extensive selection of beaches along its coastline. In addition to its natural assets the country is also rich in historical and cultural heritage.

International tourism in Turkey has been a growing sector for the past two decades. There was limited development of tourism before the 1980s but this was followed by rapid growth after the 1980s. An estimation of 8 million international arrivals was recorded in 1994, compared with 1.6 million international arrivals in 1983 (Ministry of Tourism, 1993; 1994).

Although Turkey's tourism potential is extremely high and competitive, Turkey can not be said to be exploiting its tourism potential adequately. Because of the lack of effective promotion, actual and potential tourists either do not have enough information about the tourist resources of Turkey or hold wrong perceptions about the country. Hence, the improvement of tourism promotion by Turkey is important in order to improve its image abroad, and attract more demand from its foreign markets.

PURPOSE OF THE STUDY

In this research there are several specific objectives which can be summarised as follows:

First, to identify the images and expectations of the British tourists about Turkey as a tourist destination.

Second, to identify what are the major sources from which the British have obtained their information about Turkey and how they organise their trip.

Third, to identify tourist satisfaction levels with the various services encountered in Turkey.

Fourth, to explore the British tourists' socio-economic characteristics.

Fifth, to identify the motivations for their trip to Turkey.

Sixth, to explore the opinions of British tourists' on sources of information which help them while in Turkey to visit the attractions or to use facilities.

Seventh, to reveal whether or not Turkey is a 'cheap' beach holiday destination in the view of the British tourists.

Eighth, to analyse the degree of awareness of the British tour operators' with Turkey as a tourist destination and examine what types of image do the UK tour operators have about Turkey.

Turkey is chosen for this study for three reasons. First of all, although tourism has begun to play a significant role in the economy of Turkey in recent years, it has also been some kind of a paradox. The author preconceived that marketing activities of the Ministry of Tourism and other related organisations are uncoordinated and inadequate in many aspects. Therefore, it is worthy of investigation. Second, it was assumed that the investigation would help policy makers in Turkey to improve decision making with regard to tourism marketing. Third, it was thought that the familiarity of the author with the country would be helpful during the field research.

SIGNIFICANCE OF THE RESEARCH

This study aims to help policy makers at state and regional levels. It would provide important information about Turkish tourism organisations. Moreover, the study will highlight the problems which tourist meet, their needs and wants, their image and expectations about the county, and the reasons for their satisfaction and dissatisfaction. This information would help the policy makers to develop their strategies for the tourist sector and to mitigate its problems, and overcome its difficulties.

For the British tour operators, the study will provide useful information that can enable them to see certain areas for possible improvement in promoting Turkey. In addition, they can have general information on their customers' needs and satisfaction levels.

RESEARCH HYPOTHESES

Based upon the research objectives that are presented above, the following research hypotheses were formulated:

Hypothesis 1:

The degrees of familiarity with Turkey as an international tourist destination country possessed by the UK tour operators and their attitudes towards Turkey are influenced by the marketing activities of the Turkish tourism organisations.

Hypothesis 2:

The attitudes of British tourists towards Turkey as a tourist destination is influenced by the marketing activities of the Turkish tourism organisations, and UK tour operators offering the country as a tourist place.

Hypothesis 3:

The travel motivations of the British tourist are probably attributable to Turkey's good weather and being a "sun, sea and sand" holiday destination.

Hypothesis 4:

The degree of satisfaction experienced by British tourists with Turkey is influenced by the activities of the Turkish tourism organisations and the tour operators which are offering the country as a tourist destination.

Hypothesis 5:

As an overall statement, the British tourists are satisfied by Turkey's tourism facilities and attractions.

RESEARCH METHODOLOGY

The methodology used in this study is a combination of theoretical discussions and empirical study (i.e. two questionnaires were designed, one for the UK tour operator and the other for a tourist survey). The research was conducted in both Turkey and the United Kingdom.

Theoretical study required an extensive search of secondary data. These data were valuable in trying to analyse Turkey's tourist attractions, market share, economic importance of tourism in Turkey, marketing concepts, image and attitudes of tourists, travel choice and tourism marketing mix and so on. Previous literature on the above subjects, relevant textbooks, journals, unpublished theses, publications of the Turkish Ministry of Tourism have been consulted.

With regard to empirical study two questionnaires were designed, namely the UK tour operator and the British tourists' survey. Detailed information on these survey methodologies has been given in Chapter five. Statistical Package for the Social Sciences (SPSS) computer programmes were used to analyse the data.

THESIS OUTLINE

This thesis has nine chapters. Chapter 1 presents a general introduction to the study dealing with the background, purpose, significance of the study, and the methodology used. Research objectives and hypotheses are identified and the limitation of the study are noted. The chapter ends with a broad outline of the entire thesis.

Chapter 2 discusses tourism in Turkey. In the first part a general profile of the country is given with regard to its geography, climate, history, political system, socio-cultural features and economy, and also the contribution of tourism to the Turkish economy. The chapter also deals with the demand and supply aspect of tourism in Turkey.

In Chapter 3 and 4 efforts have been made to review an extensive literature relevant to this research. Chapter 3 examines the concepts of tourism marketing. In this respect, it looks at the buying behaviour of the consumer; the main determinants of travel and tourism demand; the principal external factors influencing tourist flows; travel motivations and the decision process for travel. It also looks at different types of market segmentation. Chapter 4 examines the application of the marketing mix elements in the tourism industry.

Chapter 5 discusses the design of the field study. It includes the identification of sample, research methods used, the development of the questionnaires and data analysis.

Chapter 6 and 7 are devoted to the analysis of the findings of the tour operators and tourists' surveys.

Chapter 8 is an attempt to make a strategic plan for Turkish tourism in the light of field research findings. And finally, Chapter 9 discusses the contributions of the research. It also provides some recommendations to overcome the problems and notes the limitations of the study. This chapter also makes suggestions for further research to be undertaken.

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Chapter Two

Turkish Tourism: An Overview

INTRODUCTION

The purpose of this chapter is to provide an overview of Turkish tourism. In the first part a general profile of the country is examined with respect to its geography, climate, history, political system, socio-cultural features and economy, and also the contribution of tourism to the Turkish economy. Moreover, the chapter also deals with the demand and supply aspect of tourism in Turkey. The final part is related to the organisation of the Ministry of Tourism.

COUNTRY PROFILE

Geography

Compared with most European countries Turkey covers a large area. Its total area, including lakes, of 780,576 square km (320,169 square miles) is greater than that of any European states outside Russia. Turkey is two and a half time as big as Italy, one and a half time the size of Spain and about three times as big as the United Kingdom (See Figure 2.1). Turkey is also one of the larger states of the Middle East, where she is exceeded in area only by Saudi Arabia, Iran and Egypt. A second simple,

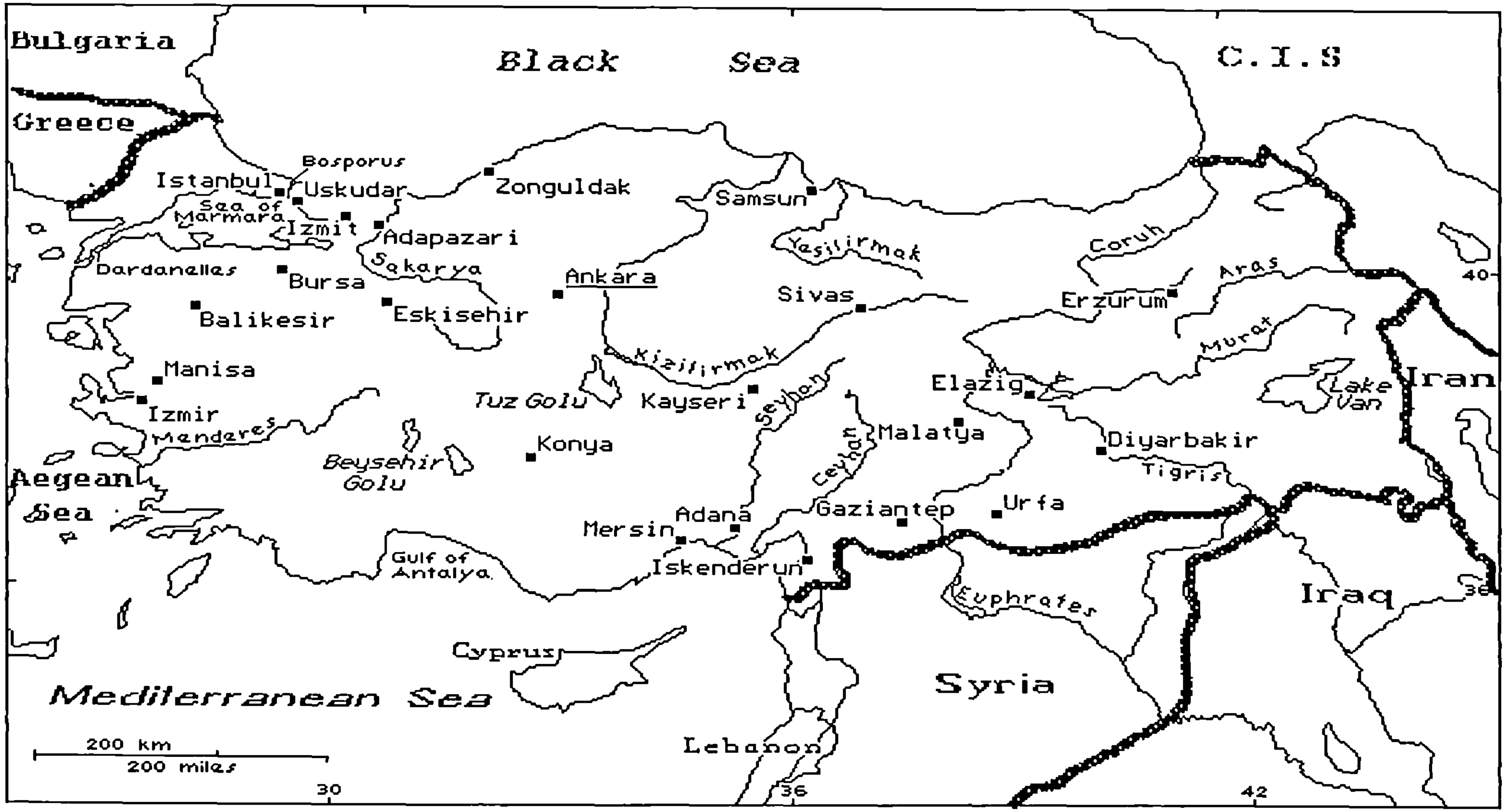


Figure 2.1 Map of Turkey

yet highly significant fact is the elongated shape of the country: with the distance from the Aegean coast to the eastern boundary is more than 1600 km (1000 miles), and from the Black Sea to the Mediterranean nowhere does it exceed 800 km (500 miles) (Darkot, 1972).

From a tourism viewpoint, Turkey is at the far end of Europe and the near end of Asia. As the country is at the eastern edge of the relatively unknown countries of Asia, it has great advantage in offering a different experience for tourists but also the disadvantage being of greater distance from the main tourist generating countries.

Climate

The climate of Turkey is the product of a variety of factors which include the country's geographical position within the northern hemisphere, its relation to the land and water masses of that hemisphere and its own size, shape and relief. In this connection, it should be pointed out that Turkey lies between latitudes 36 and 42 north, at the eastern end of the Mediterranean basin. It is bounded on the north and south by the contrasting Black Sea and Mediterranean beyond which lie respectively the great plains of eastern Europe and the sub-tropical deserts of North Africa and Middle East.

In general terms, the climate of most of Turkey can be described as a dry, semi-continental variant of the Mediterranean type or alternatively as transitional between the Mediterranean and temperate continental regime. Several areas have the winter rainfall maximum characteristic of Mediterranean climates and summer drought is very widespread, but over many of the country winter temperatures are much lower and total precipitation smaller than in the true Mediterranean regime. Continental influences are to be seen in the large temperature range experienced over wide areas and the frequent occurrence of spring rainfall maxima.

Temperature conditions differ from regions. By way of illustration, in January conditions becoming progressively colder towards the East where there is a considerable area with the mean below -10^{o}C. At times, very intense cold is experienced, extreme minima ranging from -20^{o}C in the West to -40^{o}C in the East. In the summer months, temperature differences are much less marked and all but the higher mountain areas may be described as hot. July mean temperature above 20^{o}C occur over the whole country, rising above 25^{o}C in western and central Anatolia and above 30^{o}C in the south-east, where maxima of more than 40^{o}C have been recorded (Dewdney, 1971).

History

The history of the territory which now constitutes the Turkish Republic is bound up with its position at the junction between south-east Europe and south-west Asia and its role as a land bridge between the two continents. Turkey has, at different stages in her history, formed part of a number of highly distinctive cultural zones and has been included within empires originating to the West, east and south of her present boundaries. To the west lies Mediterranean Europe, dominated in the past by the classical civilisations of Greece and Rome. To the north-west are the Balkans, affected to a limited degree by developments in the classical world but in modern times an area through which central European influences have impinged upon Turkey. To the East, Persia long formed the centres of a distinctive civilisation, while more recently the most significant influences from that direction, as from the North, have been those of the Russian empire. To the south lies the Arab world, once a major power centre, for a brief period the domain of western European powers, and now uncommitted in the contest between "western" and "eastern" blocs.

As a result of all this, much of the history of Turkey is an integral part of the history of the neighbouring territories that have been alternately areas from which Turkey was dominated or over which Turkey held sway (Dewdney, 1971).

The 11th century saw a major turning-point in the history of Asia Minor, marked by the arrival in Anatolia of the first recognisable Turkish speaking groups; the first inhabitants of Turkey who may legitimately be referred to as Turks, and founded the *Seljuq* Empire. Four centuries later, the *Ottoman* Empire began to spread from a corner of Anatolia, and during the 17th century, when Turkish expansion was at its peak, the *Ottoman* Empire covered a huge area, stretching from the Persian Gulf to Morocco, including most Arab regions and south-eastern Europe. Following the dissolution of the *Ottoman* Empire after the First World War, political control of Turkey itself passed to the nationalist movement. The new regime declared Turkey as a republic, on 29 October 1923.

Political System and Administration

The Republic of Turkey was administrated from its foundation in 1923 to 1950 by a single party's rule. On May 14, 1950 the first free election was held (Eroglu, 1987). Since 1960 Turkey has experienced three times a serious breakdown in its political system that brought military interventions. Danielson and Keles (1985:8) observed the Turkish democratic experience as: "despite periodic crises and military rule, democracy during its relatively short history has become tightly woven into the fabric of Turkish life". Similarly Weiker (1981:xv) regards democratic life in Turkey as follows: "what is perhaps even more important is that for many Turks, democracy has become a norm, which, among other things, places Turkey in a different category from many other developing countries".

Turkey is a parliamentary, civil and liberal (multi-party) republic. The government is responsible to the legislative authority (Grand National Assembly). The present Constitution determines that Turkey is a Republic, secular and parliamentary. Legislative power is vested in the unicameral Grand National Assembly of Turkey with 550 deputies, who are elected by universal adult suffrage for a five-year term. The Grand National Assembly is composed of two chambers: The National Assembly and the Senate. The President of the Republic is elected for seven years by the members of the Grand National Assembly. The Prime Minister, chosen from the members of Parliament, is responsible to the National Assembly, which gives him its confidence. The Council of State Security, consisting of the President of the Republic, the Prime Minister, the Chief of the General Staff, the heads of the Armed Forces, and the Ministers appointed by law, make recommendations to the Cabinet on matters of national security. Judicial power is independent. The judiciary system distinguishes between civil courts (under the Court of Cassation), administrative courts (under the Council of State) and military courts (under the Supreme Military Court of Appeal).

The Prefects are the representatives of the Central Administration in the provinces; they are nominated by the Cabinet and the President of the Republic after presentation by the Home Secretary. The General Council is elected for a term of four years; the number of members varies according to the population of the province. It is presided over by the Prefects and basically, it has an advisory function.

SOCIO-CULTURAL SYSTEM

Population

On a general basis, the population in Turkey is characterised by youth and dynamism. According to the census, taken on 21 October 1990, the population of Turkey is approximately 57 million (Turkish Digest Newspot, 1990). A population of nearly 70 millions is forecast for the year 2000. The annual rate of population increase is about 2.0% and 59.01% of the population live in the cities and towns, the remaining in rural areas (State Institute of Statistics, 1995). The population is concentrated in the coastal and agricultural areas.

Table 2.1 provides the basic figures relative to the demographic context. In spite of a marked decrease on death rates over the years, birth rates remain around 3 per cent. This figure is more than twice as high as in any other OECD country.

Furthermore, the labour force of the country (i.e. aged among 15-64) increases about 1 million people per year (OECD, 1988).

TABLE 2.1. Selected Demographic Indicators (1965-1993)

Demographic Indicators	**1965**	**1970**	**1975**	**1980**	**1985**	**1990**	**1993**
Population (in millions)	31.2	35.3	40.1	44.4	50.3	56.9	59.5
Growth rate of pop. % year	2.5	2.5	2.1	2.5	2.4	2.0	1.9
Birth rate (in percentage)	4.1	-	-	3.1	2.9	2.84	2.3
Death rate	1.4	-	-	0.9	0.8	0.84	0.7
Share of pop.aged 0-14 %	42	42	41	39	-	37.1	-

Sources: Derived from World Bank, (1986) and OECD, (1995)

Religion

Religion has an important role in social life in Turkey. 99.2% of the Turkish population are Muslim. However, everyone in Turkey has freedom of religion and belief. No one can be forced to participate in religious ceremonies or rites against their will and no blame can be attached to anyone in consideration of their beliefs. There are groups of Greek Orthodox, Armenian Orthodox, Byzantine Catholic, Armenian Roman Catholic. Armenian Protestant and a few even smaller sects in the country, mostly in Istanbul (Brosnahan, 1990).

The essential creed of Islam is monotheism -that there is one God, Allah- and that Mohammed is his prophet. Mohammed was born in Mecca in 570 and the revelations made to him by God are recorded in the Holy Koran; these make up the complex legal and social as well as religious system that is followed by Muslims. There are five "pillars" of Islam incumbent upon Muslims:

- The profession of the belief in one God and his prophet Mohammed.
- Prayer in the direction of Mecca at five fixed times during the day.

- The contribution of a certain proportion of wealth and income for charitable purpose.
- At least one *hadj* pilgrimage to Mecca in a lifetime.
- Fasting -and that means no food or drink may pass the lips- during the hours between sunrise and sunset for the lunar month of Ramadan (Cole, 1989).

Language

Turkish belongs to the Altay branch of the Uralo-Altay linguistic family. Before 1928, the spoken language was Ottoman Turkish. This was an amalgam of Persian and Arabic words with Old Turkish, which had been spoken from the eighth to the thirteenth centuries. In 1928, five years after the proclamation of the Republic, the Arabic alphabet was replaced by the Latin one. The Turkish Language Institute was established in 1932 to carry out linguistic research and contribute to the natural development of the language.

Nowadays, the official national language spoken by more than 90% of the population is Turkish. In the Turkish language word order and verb formation are very different from those belonging to the Indo-European languages, which makes Turkish somewhat difficult to learn at first despite its simplicity.

Cultural and Natural Heritage

Turkey has both cultural and geographic bridges between Europe and Asia. Turkey has a long and varied cultural heritage.

With a richness and variety in cultural and natural resources and the preservation and developments of these have been stipulated by law. Many organisations have been set up to achieve these aims and preservation has now become a subject that concerns many organisations, institutions and people. Turkey has approximately 2,700 historical ruins some dating back to prehistoric times and 41,000 works of culture (Directorate General of Press and Information, 1993).

When the Turks arrived in Anatolia in the 11th century they had already accepted Islam as their religion. As they have the same religion as Arabic countries, they had been influenced by Arabian civilisations. When the Ottoman Empire expanded into Europe, the Turks received cultural influences from the western civilisations.

THE TURKISH ECONOMY

The Government's Role in the Economy

The government since the 1920s has stressed two major policy goals: development through modernisation of productive methods, and a more equitable regional distribution of the benefits of development. It has acted to achieve these goals through active participation in the economy as producer, consumer, and regulator.

The government used its productive investment to initiate this inward orientation; state economic enterprises (SEEs) were set up to provide agricultural and manufactured products that previously had been imported. Its regulatory power afforded the opportunity to provide tax, tariff and non-tariff trade incentives to private producers of import substitutes.

Modernisation has been synonymous with capital deepening. The government has assured this through two investment channels. The first is direct investment in infrastructure: transportation, power, education, housing and other areas. The second is investment in the system of SEEs that control a large share of manufacturing output and employment (Conway, 1987).

Economic Overview

Turkey has been on the edge of an economic take-off for some years and the general trend of the economy has taken a steady upward expansion of demand and production, both in manufacturing and services. Before identifying the importance of the tourism sector in the economy, it is necessary to investigate the situation of the Turkish economy in two stages as prior to 1980 and after 1980.

The Turkish Economy Before 1980

Up until the beginning of the 1980's, Turkey pursued an inwardly oriented economic policy. During this period 1950-1980, as had also been the case during much of the period 1930-1950 Turkey's basic strategy of development was to industrialise based on import substitution. Import substitutions with the strategy of a closed economy were initially selective and efficient. However, in later years a closed economy strategy became progressively inefficient and stagnant. The Turkish economy instead of integrating itself with world economy chose to isolate itself from the forces of international competition. These policies and later, sharp increases of oil prices together led the Turkish economy into severe problems of inflation, increasing unemployment and the balance of payments in the late 1970's (Avcikurt, 1992).

The Turkish Economy After 1980

The real development and transformation from agriculture to industrialisation began after the Government announced a series of strict economic policy measures (known as the "Resolutions of 24 January 1980") in January 1980, aimed at controlling high inflation, reducing the balance of payment's deficit and stimulating economic growth. These policies demonstrated a basic reorientation of economic policy from direct Government regulation and control towards greater reliance on market forces (SPO, 1990).

Although the Turkish economy operates on free market principles, state influence is strong through government investment in certain industries. There are two state monopolies -alcohol and tobacco. In addition, so-called "State owned economic enterprises" -SEE's- have exclusive rights over electricity, some mining, railways, postal and telecommunication services, pulp, sugar, tea and coal, the paper, steel, petroleum, lignite and fertilisers industries are also largely operated by SEE's. Other branches of industry are substantially allocated to the private sector although the involvement of the government is not totally excluded.

In spite of rapid development and industrialisation of the Turkish economy since 1980, it still suffers from high inflation and unemployment, and average income per capita is still very low ($ 2,859 in 1993) compared to developed countries (State Institute of Statistics, 1995).

Some Socio-Economic Indicators of Turkey

It is clear from the Table 2.2 how the Turkish economy has been shaped and reconstructed when compared with the share of the sectors in the composition of GDP since 1963. Judging from the table, agricultural productions have fallen dramatically between 1963 to 1994; by contrast there have been considerable increase in the shares of industrial and service industry in the same period. This shows that Turkey is on the road of industrialisation.

Table 2.2. Sectoral Composition of G.D.P in the Turkish Economy (%) 1963-1994

SECTORS	1963	1970	1980	1990	1993	1994
AGRICULTURE	39	31.5	21.7	16.5	13.1	12.9
INDUSTRY	16	20.5	31	31.5	32.4	32.6
SERVICES	45	48	47.3	52	54.5	54.5

Sources: Derived from Devlet Planlama Teskilati (1994); O.E.C.D. (1992a); and Kepenek (1990).

However, the sectoral distribution of the employed workforce is not in line with the sectoral composition of G.D.P. In other words, while 46.8% of manpower work in agriculture in 1994, only 17.6% of workforce worked in industry in the same year (Devlet Planlama Teskilati, 1994). As for the unemployment rate, according to official statistics unemployment rate in Turkey was 8.2% in 1991; 8.1% in 1992; and 7.9% in 1993 (State Institute of Statistics, 1995).

In addition, Turkey has large amount of outstanding external debt that is gradually increased from the last decade. External dept was US$ 15 billion in 1980 (Sonmez, 1992), it reached a total of US$ 50.4 billion in 1991 and US$ 67.3 billion in 1993 (Devlet Planlama Teskilati, 1995).

TOURISM IN THE TURKISH ECONOMY

It is a very difficult task to determine the importance and role of tourism in an economy as the scope of the tourism industry is not clearly defined and there is not a reliable method to assess tourism revenue and expenses (Sezer and Harrison, 1994). Despite these difficulties, today, tourism has become a very important sector for many developed and developing countries. Since tourism has been realised in many countries and regions as a major source of job creation, income and foreign currency generation and therefore has become a dominant sector (Eadington and Redman, 1991).

As Korzay (1994) points out that tourism has become a vital component of the Turkish economy. Prior to 1963, Turkey did not have an established tourism policy. Few facilities existed in the 1960s and 1970s. With the introduction of central state planning, the basic strategic preference of Turkey switched to mass tourism. From the beginning of the 1980s the growing capacity of the country's tourism facilities leads to the advent of a free market economy and a generous incentive scheme that attracted domestic and foreign investors to the sector (Ministry of

Tourism, 1994f). As a result, Turkey received 1.5 million tourists per year, tourism revenues of US$ 280 million, and an international market share of 0.3% in the 1980s. By contrast at the beginning of the 1990s Turkey hosted 5.4 million tourists annually, earning US$ 3.3 billions in revenues, and gaining a market share of 1.2%. Ministry of Tourism (1993b). The following section will examine the role of tourism in the country's economy after giving some indicator about growth in Turkish tourism.

Growth and Development of International Tourism

From official statistical data, it can be understood that there has been a rapid growth over the past two decades in Turkish tourism. Although the growth has been slow and gradual during the period 1970-1981, it has accelerated after 1982, consequently as Uysal and Crompton (1984) stress that between 1980 and 1982 Turkey's receipts from international tourism grew more rapidly than those of any other major nation involved in tourism. Tourist arrivals (Table 2.3) were 724,200 in 1970 and reached 1,405,300 in 1981, which is a 94% increase in a twelve years period. Moreover, the increase in international arrivals accelerated between 1984 and 1994, which was 206%. Similarly tourist receipts (Table 2.3.) increased 639% between 1970-1981 and 1,170% among 1982-1994.

Despite Turkey's tremendous potential, Turkish tourism is still at the initial stage of its development. Although, as figures showed earlier, it has made considerable progress in terms of volume, in real base tourism has not grown much in terms of value. For instance, OECD's (1992b) report claimed that international tourism receipts of Turkey decreased in 1988, 1989 and 1990. Nevertheless, it was observed that Turkey has experienced a rapid growth in international tourists arrivals, revenues and bed capacity (EIU, 1993).

Table 2.3. Tourist Receipts and Arrivals in Turkey, 1970-1994

Years	*Tourism Receipts* (1,000,000 $)*	*Number or Arrivals (,000)*
[illegible]	[illegible]	[illegible]
1971	62.9	926.0
[illegible]	[illegible]	[illegible]
1973	171.5	1,341.5
[illegible]	[illegible]	[illegible]
1975	200.5	1,540.9
[illegible]	[illegible]	[illegible]
1977	204.9	1,661.4
[illegible]	[illegible]	[illegible]
1979	280.7	1,523.6
[illegible]	[illegible]	[illegible]
1981	381.3	1,405.3
[illegible]	[illegible]	[illegible]
1983	411.1	1,625.7
[illegible]	[illegible]	[illegible]
1985	1,482,0	2,614.9
[illegible]	[illegible]	[illegible]
1987	1,721.1	2,855.5
[illegible]	[illegible]	[illegible]
1989	2,556.5	4,459.1
[illegible]	[illegible]	[illegible]
1991	2,654.0	5,517.3
[illegible]	[illegible]	[illegible]
1993	3,900.0	6,500.6
[illegible]	[illegible]	[illegible]

Sources: Ministry of Tourism (1994b) and Devlet Planlama Teskilati (1994)
*** In Current prices; ± Estimated.**

Tourist Receipts in G.N.P. and Export Earnings

The significance of tourist expenditures to the economic performance of a country can be assessed through the Gross National Product and the export earnings. Tourist arrivals to Turkey were 6,500,638 in 1993 generating US$ 3,959 million. Tourist receipts make up 2.3% of G.N.P and 25.8% of export earnings in 1993, consequently tourism receipts contribute positively to the balance of payments. The significance of tourism as a foreign exchange earner in comparison to visible export commodities can be seen in Table 2.4.

Table 2.4 Exports by Commodities and Tourism Receipts

SECTORS	1992 (US$ Million)
Agricultural products	2, 203
Cereals	616
Fruits and vegetables	932
Industrial crops and forestry products	465
Live animals and sea products	190
Mining and quarrying products	264
Processed and Manufactured products	12, 252
Processed and agricultural products	1, 337
Manufactured products	10, 915
Textiles and clothing	5, 268
Hides and leather	568
Forestry	28
Chemicals	491
Rubber and plastics	380
Petroleum products	231
Glass and Ceramics	395
Cement	139
Iron and steel	1, 558
Non-ferrous metals	164
Metal products and machinery	398
Electrical equipment and products	591
Other	700
TOTAL	14, 719
Tourism Receipts	3, 639

Source: OECD (1994).

The share of tourism receipts in the export earnings is another important criterion to illustrate the place of tourism as a source of foreign currency earnings in an economy. As table 2.5. shows, the share of tourism receipts in exports has gradually increased since 1983. While the share was 7.2 percent in 1983, it was 25.8 percent in 1993. However, this gradual increase in international tourism receipts in Turkey does not mean that the tourism revenues have reached a satisfactory level, in comparison with its competitors.

Table 2.5. Share of Tourism Receipts in the Export Earnings (1983-1993)

Years	Tourism Receipts (Million $)	Exports	% Share of the Tourism Receipts the Exp.Earnings
1983	411.1	5,727.8	7.2
1984	840.0	7,133.6	11.8
1985	1,482.0	7,958.0	18.6
1986	1,215.0	7,456.7	16.3
1987	1,721.1	10,190.0	16.9
1988	2,355.3	11,662.1	20.2
1989	2,556.5	11,625.0	22.0
1990	3,225.0	12,960.0	24.9
1991	2,654.0	13,593.0	19.5
1992	3,639.0	14,715.0	24.7
1993	3,959.0	15,349.0	25.8

Source: Ministry of Tourism (1994b).

Contribution of Tourism to Employment

It is widely agreed that tourism creates employment opportunities. In Turkey statistical figures for jobs in the hotels and restaurants are not available until 1983. However, after this time, there are different figures from different sources. According to a study undertaken jointly by the Turkish Ministry of Tourism and International Labour Organisation (I.L.O.) (1994g), 75,069 jobs were created as a direct result of tourism in 1993. Moreover, the Association of Tourism Investors (TYD) (1992) indicate that 127,720 jobs were created directly by the tourism industry in 1990. Another survey carried out by The Ministry of Tourism (1994f) claimed that the services sector occupies around 21.5% of Turkey's economically active population. In 1993 around 191,000 of these people were employed specifically in the tourism sector. But only a small percentage of the employees in the tourism industry work all the year round, due to the seasonality problems, there is a high level of labour turnover.

It is worth noting tourism also has a significant contribution in generating indirect employment. Dalli (1991) points out that one unit of direct employment creates about 1.5 units of indirect and stimulated employment. In addition, Barutcugil (1986) underlines the significance of indirect employment, in particular the Aegean and Mediterranean regions of Turkey. He emphasis that tourists staying in campsites, motels and boarding houses makes their consumption expenditures in local restaurants, cafes, shopping centres or small stores, thus creation higher indirect employment.

As a concluding note, the tourism industry is likely to be the major source of new employment for the next generation in Turkey. Apart from the direct effect in the sector and general employment level in Turkey, it is clear that the indirect effects will be higher.

THE SUPPLY OF TOURIST SERVICES IN TURKEY

Turkey has an exceptional wealth of tourism assets that compare favourably with those of competing countries in the Mediterranean region and elsewhere. Its natural attractions cover a vast, varied and unspoilt landscape with forests, rivers and mountains as well as an extensive selection of beaches along its 7, 100 km. of beautiful coastline. As mentioned previously, the cultural heritage of Turkey is rich as a result of the country's geographical location, forming a bridge between Europe and Asia and keeping its role of transaction between eastern and western culture.

Attractions

The attractions of a tourist destination can be scenic, climatic, cultural or historical and they exercise a gravitational influence on non-residents. Destination choice can be influenced by one or an amalgam of attractions. Different markets display varying travel motivations and, in consequence, the attraction of a destination will be ranked in accordance to different preferences by these markets.

The tourist attractions of Turkey as a destination may be grouped under the following sub-headings:

Natural Attractions

Turkey is a country where four seasons occur in the same day, with its interesting geological structure and its climatic conditions characterised by large difference in rainfall and temperature across the country. Turkey displays a multi-faceted richness with its steppes, its expansive forests, its lakes and wetlands.

The country's extensive beaches, which have been identified as among the cleanest in the latest Mediterranean Action Plan, along its 7,100 km coastline are intensively backed by spectacular mountain scenery (Ministry of Tourism, 1995a). The coast of the country is divided into four main areas: the Black Sea, the Aegean, the Mediterranean and the Thrace and the Sea of Marmara Coasts.

The Black Sea Region possesses good weather, however it is much more variable than the Aegean and Mediterranean climates. The scale of tourism development is still much lower compared with the other coastal areas of the country. The Aegean coast is one of the most popular tourist regions of the country. Most of the modern resorts catering for the package tourists are located in the southern half of the Aegean coast. The Aegean coast is ranked second in Turkey for its bed capacity and actually it is closely rivalled by the Mediterranean coast. One of the principal aspects of Turkish tourism is a stretch of coast extending west from Antalya to the Aegean. This area is sometimes referred to as the "Turkish Riviera". The Mediterranean region is ranked first in terms of the concentration of accommodation with the provision of 77,759 beds in 1993 (Ministry of Tourism, 1994a). Among the other regions, the Thrace and Marmara region cater chiefly for the domestic market.

Historic and Cultural Attractions

From the standpoint of historical and socio-cultural assets the country has a very important position in the world market. According to Manisali and Yarcan

(1987), Turkey is almost an open air museum with remains of past civilisations and cultures. With a history dating back to before 8,000 BC., Turkey is wealthy with many still largely unexcavated archaeological ruins of ancient cities, religious sites and other areas of outstanding interest (Burton, 1991).

Holliday (1989:16-17) is in the line with Manisali and Yarcan and Burton and he explained that "Turkey today is guardian to relics of many ancient civilisations going back over 10,000 years. Since that time the country has played host to the Hittite, Greek, Roman, Persia, Selcuk and Ottoman empires, many of the ancient sites and treasures occur in just the areas that are now becoming the most popular for tourism". Moreover, according to a recent research, Turkey preserves over 2.3 million historical art objects in 170 museums (World Newspaper, 1993). More importantly, the country has 10,000 protected heritage sites and 50,000 excavation sites (Kircioglu and Nazilli, 1983).

With regard to the regions, the Aegean region is archaeologically one of the richest. The Aegean coastline has the calcified waterfall of Pamukkale. Thermal spring waters laden with calcium carbonate, have formed a white petrified plateau of basins. The thermal waters have been used since Roman times for their therapeutic powers. The Mediterranean region has also many historical sites as well. Like the Aegean Coast, the Mediterranean coastline is scenically unspoilt. Resorts like Side and Antalya are ideal destinations enjoying a warm Mediterranean climate offering, in abundance, the pre-requisites of sun, sea and sand. In the centre of the country, the Goreme has the major historical places. According to Asia Travel Trade (1988) Central Anatolia's two remarkable, and indeed unique, attractions are located at Capodacia and Pamukkale.

Turkish Cuisine

It is worth while travelling to Turkey just to eat. Turkish cuisine is thought by many to rank with French and Chinese as one of the world's great basic cuisines.

Media attention focused on Turkey as a tourist destination, consistently remarks enthusiastically about Turkish cuisine. It can be said that food is unlikely to prove a singular motivates for travel; however, it is undeniable an attraction to tourists seeking a new meal experience, and is an important determinant of holiday satisfaction.

Shopping

Istanbul is the major city with a great variety of tourist attractions. In contrast to the historical splendour and architectural magnificence is the additional attraction of Istanbul's covered bazaar (Kapali Carsi), particularly popular with excursionists and tourists in transit to Aegean and Mediterranean resorts. Turkey recognises the magnetic attraction of souvenir shopping and all key resorts have bazaars selling carpets, ceramics, copper, inlaid wood, jewellery, leather etc. Turkey is famed for high quality goods at low prices, particularly carpets and leather goods.

Other Facilities

Apart from the "sun-sea" and "cultural" basis for holidays, the country has great potential for providing a variety of activity holidays. According to EIU (1989), there has been great interest in Turkey in developing ski resorts in line with the international boom in recent years. At present there are four skiing centres in Turkey, only one of them has international service standards. However, there are 4 skiing centres planned to be opened with 24,000 bed capacity in the Eastern part of Anatolia in the near future (Gurson, 1992).

Yacht tourism has also become particularly popular in the last few years and yachts companies have increased bed supply. Furthermore, the country offers some hunting and fishing facilities. In addition, there are about 1,300 thermal springs scattered throughout western Anatolia. Turkey has the thermal source potential that can give services to one million people per day (Simsek, 1991).

ACCOMMODATION INDUSTRY

Registration, Grading and Classification

Accommodation firms throughout Turkey are registered by the Ministry of Tourism and upon registration they are granted the certificate of Foreign Tourist Operation Licence. The Ministry of Tourism promotes only tourist operation licensed accommodation establishments within the country and abroad via published guides and reports.

Furthermore, the hotel grading system in Turkey based on a one to five star ratings is not comprehensive and is solely on the physical aspect of the building without taking into account the provision of standard of services (Avcikurt, 1992). In addition to licensed establishments there are also a number of establishments registered by the local authorities for security reasons.

Collection of Accommodation Statistics

Collection and evaluating the data on accommodation statistics was started in the second half of 1974 and has been collecting since then. The registered establishments participate surveys on monthly bases.

The Structure of the Accommodation Industry

Hotel establishments have a large share in the structure of the Turkish accommodation industry (84 % of total bed supply in 1993). With respect to classes, two stars and three star hotels are more common and most of the investment licences have been given to these categories (Table 2.6). However, in recent years a notable increase has also been observed particularly in the number of holiday villages and boarding houses.

Table 2.6 Tourism Operation and Investment Licensed Beds According to Type, Class and Number of Establishments in 1993

TYPE	CLASS	NUMBER OF BEDS			
		TOURISM OPERATION LICENSED	NUMBER OF ESTAB.	TOURISM INVEST-MENT LICENSED	NUMBER OF ESTAB.
Hotels					
	5 stars	39,316	69	29,474	52
	4 stars	27,537	95	38,551	122
	3 stars	52,010	310	96,014	580
	2 stars	42,457	480	40,874	474
	1 star	16,578	240	6,940	121
Motels					
	1st class	1,390	14	1,545	20
	2nd class	1,477	29	2,073	45
Holiday Village					
	1st class	32,674	47	34,522	65
	2nd class	2,932	11	9,792	25
Boarding Houses		5,897	181	7,969	236
Campings		6,557	26	5,185	21
Inns		994	7	270	2
Thermal Resorts		40	1	-	-
Apart Hotels		1,596	19	-	-
Special Licenses		3,783	52	2,582	22
TOTAL		**235,238**	**1,581**	**275,791**	**1,785**

Source: Ministry of Tourism (1994a).

The hotels within the country are mainly geared towards holiday travellers, business persons and conference delegates. Apart from hotels, accommodation is also provided by motels, holiday villages, boarding houses, camping sites, apart hotels, and others comprising villa apartments, timesharing establishments, rental houses, youth hostels, yachts, health establishments (in spas and thermal resorts), second homes and holiday accommodation for employees and workers of companies.

Accommodation Bed Supply

Demand for tourist accommodation has grown rapidly in recent years. To accommodate surge in demand since 1980, the supply of registered accommodation increased more than four times from 56,044 in 1980 to 235,238 in 1993. It is important to note that this rapid growth has been achieved through the framework of the tourism incentive laws. As a result of the allocation of public lands with reasonable conditions to investors and some investment incentives obtained, there have also been a significant increase in the number of tourism investment licensed establishments and the bed capacity, specially after 1984 (Table 2.7). However, in terms of regional distribution, the accommodation supply is not balanced (See Figure 2.2). As there is a "resort oriented market" for tourism in Turkey, the development of tourist accommodation concentrates at the coast. In addition to operation licensed tourist beds, there are 291,037 beds in operation that are licensed by municipals, 187,319 of which are accounted to be of good quality (Ministry of Tourism, 1994d).

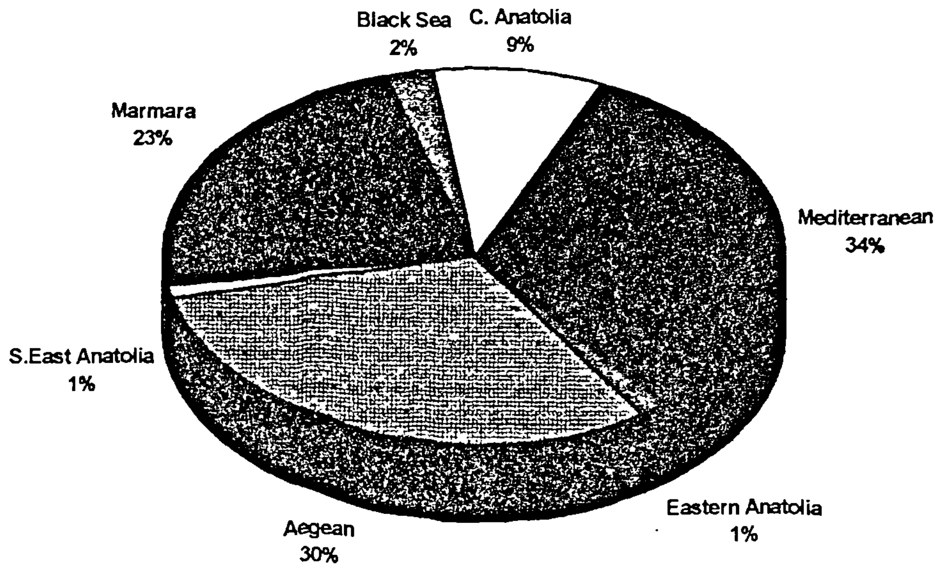
Table 2.7. Accommodation Facilities Licensed by the Ministry of Tourism (1979-1993)

Years	*No of Establishments*	*No. of Beds*
1979	494	53,956
1980	511	56,044
1981	529	58,242
1982	569	62,372
1983	611	65,934
1984	642	68,266
1985	689	85,995
1986	731	92,129
1987	834	106,214
1988	957	122,256
1989	1,102	146,306
1990	1,260	173,227
1991	1,404	193,487
1992	1,498	219,940
1993	1,581	235,238

Source: Ministry of Tourism (1994a)

Due to the variations in infrastructure, ways of living, and local perception, some areas have developed more quickly. In 1993 Marmara, Aegean and Mediterranean regions together comprised 87% of total bed supply (Figure 2.2). Because of the unbalanced regional distribution, the benefits of tourism cannot spread in the regions equally. The socially and economically most underdeveloped regions benefit from tourism little although they need more than the industrialised western part and Mediterranean region of the country.

Figure 2.2 The Regional Distribution of Licensed Beds in 1993



Source: Ministry of Tourism; (1994a)

Distribution Channels

According to EIU (1989), Turkey has been served by well-developed travel trade and a large number of overseas based travel companies contribute to the marketing effort of the country. There are about 700 tour operators organising tour programmes to the country from abroad. It can be noticed that tour operators based abroad has been one of the main elements having a great role in increasing demand for Turkey in recent years. It is important to note that the European tour operators are the most important ones dealing with Turkey because of the high volume of European tourists to the country.

The Turkish travel trade has begun to play an increasing role in the tourism industry. However, there is no clear distinction between tour operator and travel agents of the country. According to Travel Agencies Law (No:1618), travel agents are distinguished in three categories as A, B and C group licensed travel agencies. The emphasis in the travel trade sector is generally given on "A group licensed travel agencies" in other words local tour operators working notably on the incoming foreign tourist market and operating outgoing tour packages as tour operators. "B group agencies" handle services given by "A group agencies" and provide all kinds of ground arrangements. "C group agencies" deal with only domestic travel arrangements. According to Ministry of Tourism (1995b) there are 1,331 "A group licensed travel agencies", 151 "B group agencies" and 126 "C group agencies" operating in Turkey.

Travel in Turkey through travel agencies is predicted to be around 2%. Yet, of the market this percentage is much lower compared with western countries such as Germany and the UK. Hacioglu (1989) relates this situation to the socio-economic and traditional factors of Turkish society. So to overcome this problem, travel agencies should promote themselves in the public media effectively and inform people more. Moreover, they should give a reliable impression to the target customers and emphasis the relative cheapness of organised travel over independent travel.

Transport and Accessibility

As Burkart and Medlik, (1982) point out, the development and growth of tourism depends in part on the adequacy of the available transport services. One of condition contributing to the success of a tourist destination is its accessibility from tourist generating markets, and the efficiency of its internal communication network enabling tourists to move wherever they wish to once they are there.

In 1993 the majority of arrivals, 54.25% came to Turkey by air and the second group of arrivals 33.09% came by land (See Table 2.8). It may be said that the development of inclusive charter flights has been a significant factor in the growth of Turkish tourism as in other Mediterranean countries.

As Turkey lies within a favourable flight range, it is served by major international scheduled airlines. Turkish Airlines (THY) also serves around thirty cities in Turkey, and the important cities in 48 countries, including USA, Canada and Japan.

THY contributes to Turkish tourism and the economy by offering promotional pricing and specific market strategies as well as through investments, foreign exchange inputs and employment possibilities, indirectly through its role in the development of other sectors. Due to the recent tourism boom in Turkey and to the considerable increase in international competition, Turkish National Airlines is trying to have a market share in long-haul travel. However, Turkish Airlines has not been efficient in terms of capacity and quality. As in 1991, total aircraft seat capacity were 5,760 and it is planned that capacity will reach 8,400 by 1997 (TURSAB, 1992). In addition to the Turkish Airline, private airlines also play an important role in Turkish tourism such as Istanbul Airline, Bogazici Air, Onur Air.

Turkey is also accessible by sea. In terms of car ferries, Turkish Maritime Lines sail every week from the beginning of April to the end of October, to Venice-Piraeus-Izmir-Istanbul and Antalya. Moreover, there are services between the Greek Islands and Turkey's various coastal cities.

Rail services operate from Europe to Istanbul, with connections to all major cities and towns but it is still the least frequently preferred mode of transport. In spite of some improvement in the quality of train carriers and services operated, the country still cannot take advantage of her tourist potential due to insufficient connection with tourist areas.

Table 2.8 Distribution of Foreign Arriving in Turkey by Means of Transport (1980-1993)

Years	*Air*	*%*	*Land*	*%*	*Train*	*%*	*Sea*	*%*
1980	312,046	24	454,318	35	98,511	8	423,187	33
1981	365,722	26	546,207	39	85,825	6	407,557	29
1982	395,272	28	578,534	42	52,736	4	365,175	26
1983	543,160	33	562,620	35	76,034	5	443,285	27
1984	684,000	32	883,000	42	43,000	2	507,000	24
1985	868,363	33	1,170,333	45	53,549	2	522,679	20
1986	945,019	40	930,347	39	53,664	2	442,055	19
1987	1,414,710	50	814,055	28	62,417	2	564,364	20
1988	2,112,985	51	1,284,178	31	67,001	2	708,563	17
1989	2,344,716	53	1,292,917	29	76,045	2	745,473	17
1990	2,558,767	47	1,928,250	36	144,843	3	757,448	14
1991	1,700,103	30	3,206,498	59	116,008	2	495,288	9
1992	2,977,519	42	3,311,085	47	76,221	1	711,271	10
1993	3,526,533	54	2,150,917	33	41,471	1	781,717	12

Sources: Ministry of Tourism, (1993a and 1994b)

Tourist Infrastructure

In the view of Gotts, (1987) although Turkey is fast becoming a popular tourist resort, its tourist infrastructure is not adequate. Lilley (1992), is in line with Gotts and he explained that in Turkey many of the hotel rooms are not satisfactory with water and power supplies, poor plumbing and little, if any, thought given to landscaping. In spite of the government's continuous efforts to upgrade roads, electricity, sewage disposal and other utilities, an inadequate transport system is still one of the factors limiting the spread of tourism through the country.

Since most tourists visiting the country travel by air, the government is trying to facilitate inbound and outbound traffic at the international airports, particularly

Istanbul's Ataturk Airport and upgrading the existing airports throughout the country. It must be concluded that despite some inefficiencies and inadequacies, the Turkish government has been encouraged to provide and improve infrastructure due to rapid tourism development in the last decade. In other words, as priority is given to tourist areas in terms of providing infrastructure, foreign tourism has been a substantial factor in the more rapid improvement of infrastructure.

DEMAND ASPECT OF TOURISM IN TURKEY

Due to the geographical location of Turkey, it is one of the short-haul destinations, within four hours flight from most capitals in Europe, and it is reasonable to say that Turkey's international tourism business comes mainly from Europe and developed countries.

Generating Tourist Markets to Turkey

In terms of tourist generating countries, Germany is the principal market for Turkey. Germans arrive in large numbers and spend substantially more per head than any other visitors. The UK is the second principal market, and France runs a poor third. Other important markets are the Turkish neighbours of Bulgaria and Greece who visit in large number but again have a low spend per head. While US tourists are not present in large numbers the Turkish tourism industry has identified the US as an important target market (Woolfenden, 1990).

OECD Countries

As it can notice from the Table 2.9, Turkey received 83.6% of tourist arrivals from Europe in 1993, 48.69% of which is from European O.E.C.D countries and 34.92% from Eastern Europe. Among O.E.C.D. countries Germany, United Kingdom, France, Netherlands, Austria, Greece and Italy are the most important tourist generating countries for Turkey in order of importance (Table 2.9).

Table 2.9. Comparison of Foreign Arrivals from Turkey's Main Markets in 1993

Country of Region	No. of tourist	Share (%)
Austria	211,337	3.25
Belgium	88,120	1.36
Denmark	79,369	1.22
Finland	96,359	1.48
France	301,009	4.63
Germany	1,118,750	17.21
G. Britain	441,817	6.80
Greece	148,198	2.28
Ireland	26,608	0.41
Italy	134,669	2.07
Netherlands	216,182	3.33
Norway	54,332	0.84
Spain	63,120	0.97
Sweden	87,021	1.34
Switzerland	82,853	1.27
Island	2,980	0.05
Luxembourg	2,076	0.03
Portugal	10,125	0.16
EUROPE OECD	**3,164,925**	**48.69**
U.S.A	254,945	3.92
Canada	35,144	0.54
Australia	30,585	0.47
Japan	47,317	0.73
New Zealand	7,629	0.12
TOTAL OECD	**3,540,545**	**54.46**
Africa	75,509	1.16
American Continent	45,761	0.70
Asia	563,959	8.68
East Europe	2,269,809	34.92
Oceania	73	0.0
Haymatlos	4,982	0.08
TOTAL	**6,500,638**	**100.00**

Source: Ministry of Tourism (1994b)

It is observed that Western Europe is the major regional market for Turkey. This proportion has tended to rise since the mid 1970s. The main factor for this has been a significant fall over the period in travel from Muslim countries. The significance of this change is evident from the fact that in the mid 1970s the Muslim world was the largest single source of visitors to Turkey, accounting for more visitors than Western Europe. However, by the late 1980s visitors from western Europe were outnumbering Muslim visitors by three to one. In essence, the past decade has seen Turkey's market orientation swing from East to West (EIU, 1989).

To comment on the OECD European market overall, it may be concluded that this market is much more stable and significant. In fact, the success of Turkish tourism depends mostly on the arrivals and receipts from these countries, which have a relatively high standard of living. Another point is that Turkey wishes to be a full member of the EU. Thus, the country is giving more importance to the Western European market and wishes to integrate her tourist industry with the West. Another improvement has been observed in arrivals from Scandinavian countries. Giving much more importance to this market with intensive promotion efforts, Turkey can achieve a significant growth from these countries (Ozturk, 1993).

Non-OECD Countries

Eastern Europe

The countries in this group are Bulgaria, Czechoslovakia, Hungary, Poland, Rumania and the former USSR. The population of the former East European communist states totals 113 million, excluding the former Yugoslavia. However, economic constraint, particularly on foreign currency, means that the actual volume of foreign travel to destinations outside the former Eastern Block remains very limited and traffic is mostly VFR (Visiting Friends and Relatives) (Tourism Planning Research Associates, 1991). On the other hand, recently, there has been a great increase in the share of visitors coming from Eastern Europe whose share went up from 16% in 1989 to 34.9% in 1993 after the dissolution of the socialist bloc.

To comment on the Eastern European market overall, it is observed that the social and political changes taking place there have accelerated tourist arrivals. Certainly a new potential market for Turkish tourism lies in the Eastern Block countries and Turkey is obliged to plan for the long term and assess exactly what the demands and wishes of this market will be.

Africa

Africa is not an important tourist market for Turkey. Arrivals from Libya, Morocco, Algeria, Egypt and Tunisia have fluctuated year by year. Turkey received only 1.16% of tourist arrivals from Africa in 1993. Most of these arrivals are for business purposes and particularly, tourists from Libya and Tunisia arrive for shopping in the coastal cities of Turkey.

Asia (Middle East)

In this category, the Middle East is the dominant market. However, this market shows great upward or downward fluctuations due to social and political problems in that area. To comment on the Asian market, it cannot be said that these countries are stable markets. As long as political and other problems continue, the Turkish tourist industry cannot rely on this market at least, in the short term. However, the country can promote itself and should offer suitable products for the potential market in the Gulf countries more extensively and effectively as their spending per head is quite high and its relative proximity compared with some other markets.

South America and Oceania

This area is not yet a potential market. Arrivals, particularly from Brazil and Argentina have increased slightly in 1993 in compare to 1992. The long-haul range, lack of strong relations and marketing as well as the economic and political problems of these countries have limited tourist arrivals from this market.

Distribution of Foreigners Arriving in Turkey by Purpose of Visit

The Ministry of Tourism started to collect statistics of foreign tourism by purpose of visit in 1987. According to the Ministry of Tourism (1991), holidays account for 72.4%; 7% of visits are for cultural purposes; 6.5% come for business reasons; 4.1% visit for shopping purposes; and 3.2% come for VFR. A recent survey carried out by the Ministry of Tourism on this subject gives a clear indication of the present nature of tourism development motivation to visit Turkey. According to this survey holiday account for 60.2%; 10.7% are for shopping purposes; 9.4% come for cultural purpose; and 6.4% visit for business reasons (Ministry of Tourism, 1994c).

From the above indicators, it can be said that holiday tourists dominate the foreign tourism market in Turkey. The tourism policy of the state, except in the Sixth Year Development Plan, was very much in line with the changing market towards mass tourism (Devlet Planlama Teskilati, 1989).

Monthly Distribution of Number of Arrivals, Nights Spent, Average Length of Stay and Occupancy Rates in 1993

Demand for tourism in the holiday market is highly seasonal and congested in the peak summer months particularly from June to September. This brings a known problem that is seasonality. As Kusluvan (1994) point out seasonality is caused by the holiday taking patters of tourist generating countries and climatic conditions in tourist receiving countries both of which are difficult to change. Being no exception, Turkey's tourism industry also shows concentration patterns. By way of illustration, as can be understood from the Table 2.10, 69% in 1990, 68% in 1991, 70% in 1992 and 68% in 1993 of all tourists came between May and October, that is within the period of six months. Seasonality is very big problem for tourist receiving countries, specially for developing countries. It creates two main problems; under-utilised capacity and seasonal unemployment.

Table 2.10. Monthly Distribution of Tourist Arrivals to Turkey, 1990-1993

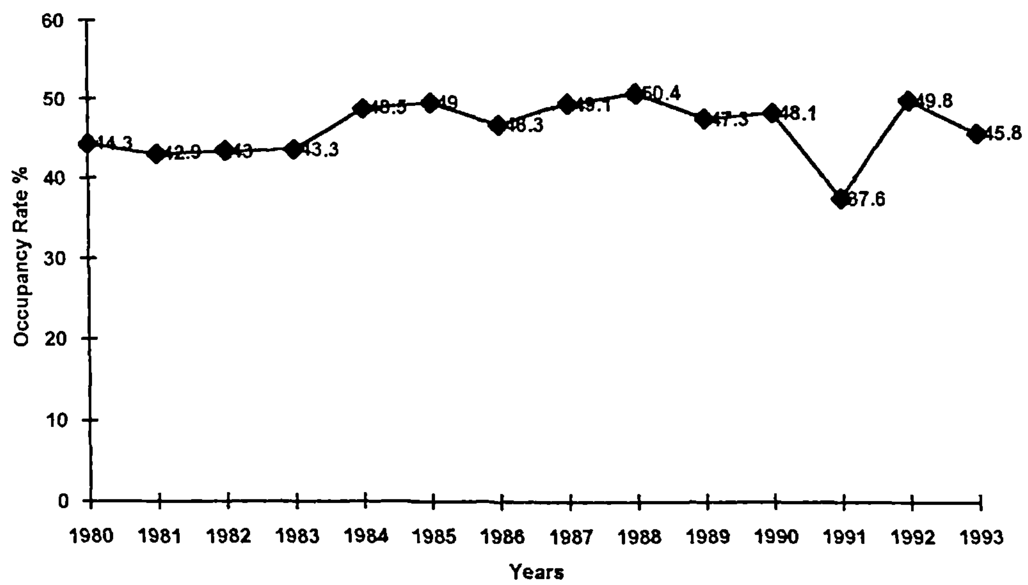
MONTHS	1990 (%)±	1991 (%)±	1992 (%)±	1993 (%)±
JANUARY	2	3	3	3
FEBRUARY	3	3	4	4
MARCH	5	5	5	5
APRIL	8	7	8	9
MAY	10	9	10	12
JUNE	10	9	10	10
JULY	13	11.5	14	12
AUGUST	14	14	14	12
SEPTEMBER	12	14	12	11
OCTOBER	10	10.5	10	11
NOVEMBER	7	7	5	6
DECEMBER	6	7	5	5

Sources: Derived from Ministry of Tourism (1993a and 1994b).
± Rounded

Official statistics, published by the Ministry of Tourism in 1994 indicated that 6.5 million foreign visitors came to Turkey in 1993 and of those only 3.6 million were registered on arrival at official licensed accommodation facilities. It is also observed that the average length of stay for foreigners has improved since 1980, from 2.7 days to 3.8 days in 1993 (Ministry of Tourism 1994a).

The occupancy rate will differ according to location and type of accommodation. Figure 2.3 gives the yearly average occupancy rate. It is clear from the Figure that occupancy rate varied by year to year. An average for 14 year period is 46.1%.

Figure 2.3. Average Occupancy Rates Between 1980- 1993



Source: (Ministry of Tourism, 1994a).

Domestic Tourism

It is widely agreed that tourism activities bring economic benefits for tourist receiving countries. In fact, today there is a rapidly growing demand in domestic tourism beside the rapid development observed in international tourism. Thus, it is important to consider and research both domestic and foreign tourism together since the development of domestic tourism, economically may reduce the expenditure made by the citizens abroad (Ceylan, 1985). Therefore, a contribution to the economy may be made through savings of money otherwise part on foreign travel.

As far as domestic demand is concerned, 4.8 million accommodation arrivals were recorded by Turkish nationals in different type of accommodation establishments whereas 4.1 million foreign visitors were registered in 1993. In the same year, 9.7 million nights in these establishments were spent by citizens and 17.1 million nights spent by foreigners (Ministry of Tourism, 1994a). However, it should be noted that the exact figures related to domestic visitors are difficult to give as a number of domestic visitors prefer to stay in unregistered accommodation establishments, in their second homes or their friends or relatives.

In 1993, Ministry of Tourism carried out a survey to obtain detailed information on domestic and social tourism, particularly on the demand side. This shows that around 33.4% of citizens travelling abroad go for recreation, tourism and visiting the places; around 8.6% go for cultural purpose; 31.1% for VFR relations; 13.3% for pilgrimage purpose; 4.0% for health reasons and the rest are made up of others (Ministry of Tourism; 1994e).

However, tourism policy related to domestic tourism has been in the form of meeting holiday requirements through second homes; some public and private establishments have invested in camp cities. This policy has led to investments in high tourist potential resorts and caused speculation. Nevertheless, in recent years, government has been trying to develop domestic tourism with the implementation of policies.

The Organisation of the Ministry of Tourism

The Turkish Ministry of Tourism is the main responsible governmental body in all tourism affairs. The structure of the Ministry of Tourism is composed of three main parts as Main Service Units, Consultation and Supervision Units and Assistant Units (See Figure 2.4).

The Ministry carries out the following main activities: (Refer to Figure 2.5)

Supervision of Tourism Development: The Ministry supervises and encourages all business activities in association with tourism. Its role includes assisting, guiding and co-operating public sector involvement in tourism development. It reviews feasibility studies related to foreign participation or ownership, not only relation to their economic targets but also to assure that the projects will meet the standards concerned with tourism as laid down by the Ministry.

Promotional Activities: The Ministry is accountable for tourism promotion for tourism activities both domestically and abroad. In tourism, the regional head offices and the tourist information offices in the country, and Turkish tourism offices abroad play an important role. Promotional activities undertaken by the Ministry comprise participation in international travel exhibitions, fairs, conferences, organisation of publicity campaigns, newspaper and other media promotion, cultural festivals and production and circulation of a variety of promotional literature.

Project Evaluation and Implementation: The Ministry is also responsible for assisting potential domestic and foreign investors in terms of the evaluation and implementation of tourism development projects. For that reasons, the Ministry supplies technical know-how, statistical data and information related to potential sites. Its duty also includes to assist investors in obtaining incentives provided by the government, and co-ordinates the provision by other government departments of infrastructural facilities.

Tourism Vocational Training: The Ministry also decides the manpower and training requirements, formulates training programmes for hotel and catering staff, guides etc., arranges vocational training courses and seminars, and establishes hotel and tourism schools.

Tourism Regulations: The Ministry formulates standards, grades and regulations for hotels and other modes of accommodation, for restaurants and other related firms, travel agencies and tour operators. Moreover, it awards operation licences, inspects and controls the establishments, prepares and implements loan schemes for construction, expansion or modernisation.

Conclusion

This chapter looked at the development of international tourism in Turkey and its features, in general terms. Despite of the country's size, diversity of climate and a rich historical heritage, it was only in the 1980s Turkey began to develop her tourism industry. By the early 1980s internal peace and new economic policies in Turkey have set the stage for the development of the tourism industry. Therefore, the Turkish economy has made great strides in the last decade with consequent beneficial effects for the tourism sector. Some 6.5 million foreign tourists went to Turkey in 1993 and the country earned US$ 3.9 billion in tourism revenue. However, compared to other Mediterranean countries Turkey remains a newcomer to tourism, which is, perhaps, its strength and weakness at the same time.

Turkey's future in tourism is dependent on the government's decisions. It is necessary to balance economic, social, cultural and ecological goals at each step of the way in the development of the tourism sector.

Figure 2.5. Ministry of Tourism: Main Service Units

1. GENERAL DIRECTORATE OF INVESTMENTS	*2. GENERAL DIRECTORATE OF ESTABLISHMENTS*
* Department of Research	* Department of Establishments
* Department of Investments	* Department of Travel Agencies
* Department of Planning	* Department of Sea Activities
* Department of Land Provision	* Department of Incentives
* Department of Infrastructure	* Department of Project and Construction
* Department of Co-ordination	* Department of Co-ordination
3. GENERAL DIRECTORATE OF PROMOTION	*4. GENERAL DIRECTORATE OF TOURISM TRAINING*
* Department of Research & Evaluation	* Department of Vocational Training
* Department of Travel Promotion	* Department of On-The-Job Training
* Department of Fairs and Congress	* Department of Tourist Guiding
* Department of Promotional Materials	* Department of Technical Aid
* Department of Information	* Department of Extensive Training
* Department of Co-ordination	* Department of Co-ordination
5. DEPARTMENT OF EXTERNAL RELATIONS	

SOURCE: Ministry of Tourism (1990:12)

Figure 2.4. Ministry of Tourism: Organisation Structure

Undersecretariat	***Deputy undersecretariat***	***Main service units***	***Consultation units***	***Assistant units***
1. Undersecretariat	*1. Deputy undersecretariat*	*1. General Directorate of Investments*	*1. Department of Inspection*	*1. Department of Personnel Affairs*
	2. Deputy undersecretariat	*2. General Directorate of Establishments*	*2. Department of Research*	*2. Department of Financial Affairs*
	3. Deputy undersecretariat	*3. General Directorate of Promotion*	*3. Office of Legal Adviser*	*3. Secretariat of Civil Defence*
		4. General Directorate of Tourism Training	*4. Consultants to Minister*	*4. Private Secretariat to the Minister*
		5. Department of External Relation	*5. Office of Press and PR*	

SOURCE: Ministry of Tourism (1990:11)

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Chapter Three

Tourism Marketing

Introduction

To formulate a marketing strategy on a reliable base, then it is fairly logical to deepen the analysis into tourist behaviour; his motivation to travel abroad, his attitudes and images towards particular tourist destinations, etc., all of which influence the decision-making process of the tourist customer. And due to the fact that markets consist of customers, and customers are likely to differ one another, it may be useful to expand the discussion into the area of the tourist market segmentation.

Defining Marketing

Marketing has been defined in various ways by different writers. However, it is very hard to give an exact definition of marketing. A number of authors Bhatia (1986), Heath and Wall (1992), Kotler (1988), Kotler and Amstrong (1990), Wilson (1979) defined marketing as a managerial function that co-ordinates the activities involved in developing and manufacturing suitable products for specified markets. By contrast, several other authors Drucker (1974), McCarthy and Brogowicz (1982) emphasised marketing as facilitating and satisfying needs and wants through an exchange processes.

Moreover, many definitions can be found in the study of Crosier, (1975). He made an important attempt to classify marketing definitions. He reviewed over fifty definitions, and classified marketing definitions into three major groups. Micheal

Baker, a leading marketing writer in Britain has explains this classification in his book, Marketing An Introductory Text (1991:5-6) as follows:

> "First classification which conceive of marketing as a process enacted via the marketing channel connecting the producing company with its maıket. Second classification which see marketing as a concept or philosophy of business. i.e., the idea that marketing is a social exchange process involving willing consumers and producers. Third group which emphasise marketing is an orientation".

Since marketing is a complex process, and marketing experts often disagree on what marketing is and what it consists of. To avoid this controversy in this study we will use the official American Marketing Association definition of marketing: "Marketing is the process of planning and the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organisations" Lusch and Lusch (1987:5) quoting from (Marketing Educator, 1985:1).

In this definition there are some important points: First, marketing is viewed as a process of planning and executing, which suggests that marketing is a managerial process. Second, this managerial process involves conception (i.e., thinking of or deciding what good, or service to market) and the pricing, promotion, and distribution of ideas, goods, and services. Third the managerial process is directed at creating exchanges that satisfy individual and organisational objectives.

The Concept of Tourism Marketing

Some scholars such as Kniselly (1984), Middleton (1988) believe that tourism marketing is not a separate discipline but an adaptation of basic principles, which have been developed and practised across a wide spectrum of consumer products. Indeed, in tourism, the product, from a destination viewpoint is an amalgam of various elements or components, some of which are tangible and some are intangible (i.e., service) (Burkart and Medlik 1982, Wahab 1975).

There are a number of definition of tourism marketing. Wahab (1975:105), gives tourism marketing the following definition: "The systematic and co-ordinated efforts exerted by the NTOs and/or the tourist enterprises on international and local levels to optimise the satisfaction of tourists, groups and individuals, in view of a sustained tourism growth". A similar definition of tourism marketing can be found in Krippendorf's book, Marketıng et Tourisme (1971).

Hudman and Hawkins (1989), Laws (1991) and Morrison (1989) have argued that all purchases are made to satisfy needs. Any item purchased must be able to perform the function claimed of it and for which it was primarily acquired; this is the core of the product. In the context of tourism, for instance, the core of an airline's market offering is its capability of transferring its clients safely from airport A to airport B at the time agreed.

Another aspect of marketing is highlighted in the following definition of marketing: " Communicating to and giving the target market customers what they want, when they want it, where they want it, at a price they are willing to pay" (Lewis and Chambers, 1989:9). It should be added that it is not enough to attract first-time visitors but that bringing them back for repeat visits is at least equally important for a tourism destination or organisation.

In the simplest and abstract sense, tourism marketing:

> "involves discovering what tourists want (market research), develop suitable tourist service (product planning), telling them what is available (advertising and promotion) and giving instructions where they can buy the services (channels of distributions -tour operators and travel agents). So that they will receive value (pricing), and the tourist organisation will make a profit and attain its goals (marketability)" (Moutinho, 1989:259).

Categorising The Main Determinants of Demand

Middleton (1988) identified the main determinants of demand for travel and tourism under eight broad categories. These determinants are: Economic, Demographic, Geographic, Socio-cultural, Comparative prices, Mobility, Government/regulatory, Media communications. All of these are identified as determinants of travel and tourism demand because all are external and beyond the control of individual suppliers, and changes occurring in any of them exert an influence over the size and patterns of travel markets.

Economic Factors: When travel and tourism markets are studied, it is invariably the economic factors are the most important set of elements influencing the total volume of demand generated. Middleton (1988:36) believes that

> "The influence of economic variables is more obviously seen in leisure travel where, in many countries with advanced, developed economies, average disposable income per capita has grown over the last two decades to a size large enough to enable two-thirds or more or the total population in any year to take holidays staying away from home".

It is commonly agreed that, if the other determinants remain unchanged there is a clear direct relationship between the performance of a country's economy, particularly the average disposable income of its population, and the volume of demand which it generates for holidays and leisure trips.

Demographic Factors: Demographic factors concern the main characteristics of the population which influence demand for travel and tourism. In the wider context demographic factors operating much more slowly than economic variables. However, the main characteristics determining tourism markets are household size, age, and the experience of further and higher education.

The influence of education as an important determinant of travel is not easily separated from associated changes in income and household composition. It is clear that, the higher the level of education achieved, the greater the involvement in travel, both for business and leisure purposes. This tendency reflects a greater knowledge of what travel opportunities are available.

Geographic Factors: It is true that for populations living in Northern climates, weather affects are undoubtedly one of the principal determinants of travel demand for leisure purpose, and also explain destination pattern of travel flows. For instance Mediterranean countries offer the most accessible locations for warmth and sunshine.

Beside weather, another important geographic factor is the size of the community in which people live. Generally, large urban and suburban communities, reflect also the factors of relative wealth and education. Consequently, they generate more tourism per capita than the populations of smaller, especially rural communities. Moreover, large urban centres are also catchment areas for day visitors to attractions within accessible distance.

Socio-cultural Factors: Socio-cultural factor is a term used to describe the broad trends in any society's attitudes, which influence individual motivations. However, socio-cultural factors have a wider national or regional impact in the sense that they represent commonly held beliefs and notions, with which people are brought up as children. Such a belief, for instance, is that holidays are necessities rather than luxuries, and that trips abroad for business or pleasure are symbols of economic and social status, which serve to show the value of one's position in society. Related to this is the belief by many that the amount of paid holiday entitlement of those in work should increase (Middleton, 1988).

The positive changes in terms of working conditions have encouraged the development of additional short holiday products taken at most times of the year, and has made it possible for tour operator companies to increase the capacity of products offered in shoulder months in order to cope with demand. Alternatively, there are many people with the necessary holiday entitlement and flexibility in their arrangements to travel outside what were traditional peak summer months of July and August. Remembering that the growing number of retired people able to travel when they wish, and the declining in the number of families committed to school holiday periods, has also helped to support this new flexibility in demand patterns.

Comparative Prices: Price, certainly the most important determinant of travel and tourism, which represents value to tourists and is relative to their spending power, reinforces the economic determinants previously discussed and is connected to socio-cultural attitudes. For international tourism, price is complicated by the combined effects on holiday prices of exchange rate between countries of origin and countries of destination, and of the comparative level of inflation in the destination area, compared with the area in which tourists live.

Admittedly, the concept of comparative prices is highly complex in practice and the effects are far from easy to predict with any precision, partly because customers' perceptions may differ from reality. It is also important to note that in the short run, price probably appears to be the strongest single influence on market demand in the leisure sector.

Personal Mobility Factors: Apart from comparative prices car ownership is another determinant of travel and tourism which affect the volume and nature of tourism for many producers. Middleton, (1988) stressed that ownership and access to cars increased significantly in Europe over the last decade. In the late 1980s, most hotels, tourist restaurants and the great majority of visitor attractions are highly dependent on travellers by car for their business.

Government/Regulatory Factors: Although government and regulatory factors are rather different in kind from the other factors which have been noted, the influence over demand by governments and their agencies is usually highly significant in the travel and tourism industry.

Mass Media Communications: The last of the factors, which is a determinant of demand for travel and tourism is the influence of media. Indeed it has a powerful and relatively recent influence over the demand for travel and tourism. The principal influence is that of television, especially colour television, to which the populations in countries with developed economies are by now virtually universally exposed. Television is, of course, also a main medium for advertising many products in travel and tourism.

Not least of the influences exerted by the mass communication media is the effect achieved by regular TV travel programmes, which review and expose a wide range of tourist products on offer and provide critical evaluations of their quality and value for money. Such programmes achieve a level of authority and exposure which no individual organisation's advertising budget could match. At a lower level in terms of mass impact, the exposure of the prospective traveller to books, film, newspapers, magazines and radio, contribute to awareness and attitudes in addition to TV programmes.

External Factors Influencing Tourist Flows

The principal external factors, which probably influence tourist flows from one country to another are followed:

Economic Growth Rate: There is clear evidence of the long term relationship between economic growth and the demand for tourism. Travel is becoming more resilient to economic recession, and indeed to other deterrents, apart from perceived security and safety. However, the reaction needs careful examination market by market. For example, much travel is business or institutionally controlled, in other words not simply an individual consumer's decision.

It is true that there is a relationship between travel and economic growth especially in the longer term. Economic growth is a determinant of demand. It can play an important role but the relationship is complex and varies considerably from market to market (Jefferson and Lickorish, 1988).

Fiscal and Other Statutory Regulations: Broadly speaking, developed countries have a policy of liberalising travel removing frontier formalities such as passport, visas, customs control. But, the freedom of travel cannot be accepted in all countries.

It is argued that limitation of foreign currency is a serious regulation which prevents tourist flows from one country to another. For example, the introduction of foreign exchange restriction in France in 1983 for travel abroad had a severe and immediate impact on the volume of outbound leisure trips (Cockerell, 1990). Indeed, freedom to travel is written in the principal international agreements, however, governments usually reserve the right to suspend or vary these conditions or freedoms in terms of crisis or emergency.

Controls on passports, visa requirements and travel taxes can prove more serious obstacles. Departure taxes, generally condemned in international agreements can present problems but usually their effect is to delay frontier control procedures and to annoy visitors, rather than to limit travel. Moreover, there are many other forms of regulation affecting visitors: internal taxes, social legislation limiting drinking hours, gambling and shopping hours.

Inflation and Exchange Rates: It is often claimed that exchange rates are one of the principal determinants of international tourism. For example; in 1986 in France the demand for North America decreased. Since at that time the value of the dollar went up against the franc (Cazes, 1989). Hence many French decided against going to America for their holiday. However, it may be said that the impact of the exchange rates on travel demand can be seen in long-term rather than short term.

On the other hand, some forms of travel are less price sensitive and very resilient to adverse factors. Where the satisfaction is high, the preferred destination regarded as unique or where the journey is verging on the essential such as visits for business, or to friends and relatives for a special and unique satisfaction often with specialist purpose likes; health, education, a unique cultural or religious experience. The will to travel is far stronger than the exchange rate.

In this context, Jefferson and Lickorish (1988) stress that the marketer cannot take the inflation or exchange rate influence for granted. Each principal market must be considered, and preference given to the more secure, unique or specialist segments which are more resilient to price and other pressures and deterrents.

Political Stability: In our time, insecurity and violent political stability is one of the most important external factors. Travellers, especially tourists on holiday, leave home for pleasure and relaxation. They expect something better than every day life. Anxieties should be left behind. It is often the case that tourists do not know which areas or local situations might be dangerous, also they become easy targets for robbers (McIntosh and Goeldner, 1990).

Consumerism: It has been observed that in recent years public interest and subsequent action in industrialised countries have resulted in a range of consumer protection measures constraining the free interplay of market forces. The reasons are complex; the increasing technical changes often on a massive scale. the influence of modern marketing and communication techniques. the scales of big business operation sometimes verging on monopoly situations. are held to put the consumers at a disadvantage (Jefferson and Lickorish, 1988).

It has been argued that the purchase of consumer goods offer guarantees to replace defective or unsatisfactory purchases; there can be no physical guarantee of that kind in tourism. However. the acceptance and maintenance of standards and especially in the case of tour operators, financial guarantees to ensure holidays and return journeys are protected, are important.

Above all factors, negative environmental change in the holiday destination can also influence tourist flows from one destination to another. Leisure activities and tourism have become important social, and cultural phenomenon in industrialised countries (Ascher, 1985). Many receiving countries do not care about their natural attractions even if they earn lots of money from them. For instance; in Kenya, which makes the most income from tourism based on its national parks, it is not one of the leaders in the protection of nature (Dasmann, 1984).

All external factors which are mentioned above can influence international tourist flows in different ways. In the following section we will look at travel motivations.

TRAVEL MOTIVATIONS

The Concept of Motivation in Tourism

Motivation to travel or to participate in some form of tourism might be defined as "that set of needs and attitudes which predisposes a person to act in a specific touristic goal-directed way. Motivation is thus an inner state which energised channels and sustains human behaviour to achieve goals" (Pizam and et all., 1979:195). A distinction can be made between motivation and the more frequently reported purpose of visit or objective of travel. This distinction is illustrated by Pizam and et al. (1979:195):

> "A tourist may be motivated to travel to attend a family function in order to satisfy any of his needs of belonging, status, or recognition, though his stated objective for such travel may be to visit friends and relatives. The difference between these two -motivation and objective- is that while the objective is a conscious and overt reason for acting in a certain way, motivation may be an unconscious or covert reason for doing it".

Many of the basic psychological factors underlying vacation motivation and behaviour were put forward in the pioneering paper by Grinstein (1955). Grinstein identified a need to "get away from it all", a need to escape from the demands of everyday life which can best be achieved by a change of place.

Wahab (1975) has argued that the whole area of travel motivation is so basic and indispensable in tourism studies that ignoring it, or passing lightly over it would defeat the whole purpose behind tourism development plans. Travel may be seen as a satisfier of needs and wants yet it is only when a need is recognised that it becomes a want. When a person tries to satisfy a want it than becomes motivated action. An understanding of motivation is therefore of fundamental importance since it forms a major influence on tourism demand patterns.

Two main and distinct motivations may be postulated as dominant in the pleasure travel, which have been described by Gray (1970) as wanderlust and sunlust. Wanderlust describes the desire to exchange the known for the unknown, to leave things familiar and to go and see different places, people, and cultures or relics of the past in places famous for their historical monuments and associations, or for their current fashions and contributions to society. Sunlust generates a type of travel which depends on the existence elsewhere of better amenities for a specific purpose than are available in the domicile; it is prominent with particular activities such as sports and literally with the search for the sun.

McIntosh and Goeldner (1990) also examine the motivation for travel and choosing travel products. Their model, as with Mill and Morrison's approach (1992), is built on Maslow's hierarchy of needs. McIntosh and Goeldner utilise four categories of motivation:

1. Physical motivators: These are related to refreshment of body and mind, health purposes, sport and pleasure. This group of motivations is seen be linked to those activities which will reduce tension.

2. Cultural motivators: These are identified by the desire to see and know more about other cultures, to find out about the natives of a country, their lifestyle, music, art folklore, etc.

3. Interpersonal motivators: These includes a desire to meet new people, visit friends or relatives, seek new and different experiences. Travel is an escape from routine relationship with friends and neighbours and the home environment, or it is used for spiritual reasons.

4. Status and prestige motivators: These includes a desire for the continuation of hobbies and education and are also seen to be concerned with the desire for recognition and attention from others, in order to boost the personal ego.

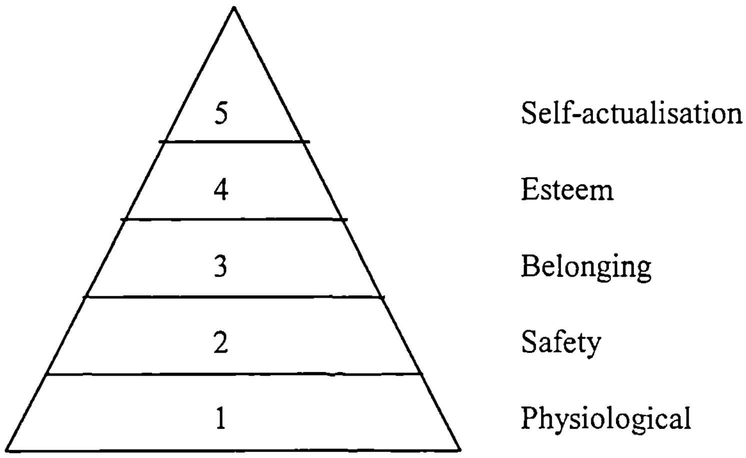
There are other empirical researchs, which have been concerned with more indirect measures of motivation. For example, Woodside and Jacobs (1985) analysed that the benefits derived from a visit to Hawaii varied from nationality to nationality. Rest and relaxation were reported as the major benefit by Canadians mainland Americans emphasised cultural experiences while Japanese visitors stressed family togetherness.

In summary, the discussion revealed no clear cut distinction among the types of tourist motivators. For instance, within the two main types of pleasure travel - sunlust and wanderlust - variations exist. A journey to a resort in a foreign country motivated by sunlust contains an element of satisfaction of wanderlust; conversely, a tourist seeking to satisfy his wanderlust also expects some of the amenities of a resort holiday. Furthermore a tourist, his original motivators are an attendance to a conference, to visit friends or relatives, also expects some of the amenities of a holiday resort. Thus, the travel market is highly fragmented. Most importantly, people do not necessarily display constant motivations and the same people may buy different tourist products at different times.

Psychological Approaches to the Study of Motivation

Some psychologists see a hierarchy of needs. It can be argued that Maslow's need hierarchy model is probably the best-known motivation theory. Probably due to its simplicity it is used in industrial, organisational and social science texts on a regular basis. The theory of motivation proposed by Maslow (1943) is in the form of a ranking, or hierarchy, of the arrangements of individual needs.

Figure 3.1 Maslow's Hierarchy of Needs



Source: Adapted from Cooper and et al. (1993:21)

Moreover, Maslow argued that, if none of the needs in the hierarchy were satisfied, then the lowest needs, the physiological ones, would dominate behaviour. If these were satisfied, however, they would no longer motivate and the individual would be motivated by the next level in the hierarchy. It is important to note that a great deal of tourism demand theory has been built upon Maslow's approach.

Pearce (1982) estimated that tourist behaviour is under long-term rather than short-term motivational control. It is true that many tourists plan their travel months in advance, and while they enjoy the immediate satisfactions of their holiday, it is also apparent that there are long-term mental souvenir and satisfactions which are enjoyed when the holiday is long since over. More specifically, it is important to bear in mind that tourist motivation must not be conceived as a simple short-term process assessed by measuring the immediate satisfactions and causes of travel behaviour.

Moreover, Parker (1983) has considered leisure behaviour to be linked to particular forms of work situations. This social psychological approach could be extended to incorporate stress stages in a person's biography. Krippendorf (1987) has found different combinations of work and leisure which he argues will create three different stages of lifestyle for the future. In the case of the first group, individuals were seen to treat work as a focus of life. Tourism for this group is of secondary importance and serves mainly to allow the individual to regenerate working energy. The second group polarise work and leisure. Although the group believes there is a need to work in order to live, they also find that life takes place only in leisure time. In contrast, the third lifestyle group aims to reduce the polarity between work and leisure and searches for fulfilment in both aspects of life.

In fact, the study of tourism motivation has been derived from a range of disciplinary areas which has led to a diversity of approach. Dann (1981) proposed that there are seven different elements within motivation. These including:

1. Travel as a response to what is lacking yet desired. This approach suggests that tourists are motivated by the desire to experience phenomena which are different from those available in their home environment.

2. Destination pull in response to motivational push. This analyses the motivation of the individual tourist in terms of the level of desire (push) and the pull of the destination or attraction.

3. Motivation as fantasy. This is a subset of the first two factors and suggests that tourists travel in order to undertake behaviour which may not be culturally sanctioned in their home setting.

4. Motivation as classified purpose. This is a broad category which invokes the main purposes of a trip as a motivator for travel. Purpose may include visiting friends and relatives, enjoying leisure activities, or study.

5. Motivational typologies: This approach is internally divided into behavioural typologies such as the motivator's "sunlust" (search for better set of amenities than are available at home) and "wanderlust" (curiosity to experience the strange and unfamiliar) as proposed by Gray, and typologies which focus on dimensions of the tourist role.

6. Motivation and tourist experiences. This approach is characterised by debate regarding the authenticity of tourist experiences and depends upon beliefs about type of tourist experience.

7. Motivation as auto-definition and meaning. This suggests that the way in which tourists define their situations will provide a greater understanding of tourist motivation than simply observing their behaviour.

As a concluding note, it is still probably true as Lundberg (1985) pointed out that we really do not know why tourists travel. It seems that whilst the long-term determinants of tourism can be identified with some certainty, and whilst they show a high degree of stability over a long period of time, motivations to tourism are less precise and tend to change more frequently. Thus, the importance of motivation research in the field of tourism can not be denied.

Factors Motivating Travel

Various attempts (Bailie 1989, Hudman 1980, Lundberg 1985, Schmol 1977, Schmidhauser 1989) have been made to study why people wish to become a tourist. Individuals normally travel for more than one reason, and for many, perhaps the majority, tourism is the outcome of a combination of motivations. There are primary and secondary motivations and sometimes the secondary motivations can be stronger influences than the primary in so far as they an affect the choice of holiday destination. Bhatia (1986) has proposed reasons why more and more people engage in tourism. These include:

Pleasure: Getting away from all that routine of everyday life is perhaps the most important motive of all in recent times. The individual's desires and need for pure pleasure is very strong indeed. An individual likes to have fun, excitement and good time whenever possible and they want this in their holiday.

Relaxation, rest and recreation: Industrialisation and urbanisation have created great pressure on modern living. The stress and strain of modern city life has made it still more necessary than ever before for people to get away from all this and relax in an atmosphere which is more peaceful and healthy.

Health: It appears that most people choose to travel because of their mental attitude. Many people have a great desire to "get away from it all". As mentioned above modern society moves at a very rapid pace; stress and strain on most people have created a need to relax, to rest. Hudman and Hawkins (1989:39) argued that "We have come, as a society, to accept the notion that a change is the equivalent of rest and relaxation. A change either in the environment, or activities, or both, provides people with that rest and relaxation".

For travellers the choice of a health vacation is an important decision. People carefully evaluate the options that are available to them in the travel market. The goals of vacationers are to recover from an illness and/or have a good time. In fact the benefits to be gained from fresh air and sunshine has long been recognised.

Participation in sports: There has been an increasing participation in a wide variety of sporting activities such as mountaineering, walking, skiing, fishing, trekking, etc. More and more people these days are taking holidays involving physical activities.

In a study (Yucelt, 1989) noted that vacation sports provide consumer services and intangible goods that are consumed at the point of purchase. Satisfied or dissatisfied behaviours should thus be stated at the end of the vacation time. In selecting a vacation sport, travellers evaluate the overall travel and the excess travel time, and compare them with the cost of travel. In doing so, they investigate the perceived risk in terms of cost, comfort, convenience, and safety, and choose their mode of travel.

Curiosity and culture: It leads travellers to search for different kinds of experiences in many parts of the world. For instance; cross-cultural exchanges, experiencing how other people live, and fostering international understanding may be a form of pleasure involved in travelling throughout the world. Many travellers travel to satisfy their curiosity about other cultures, lifestyles and places (Gee and et al., 1984).

Ethnic and family: This includes visiting one's relatives and friends. meeting new people and seeking new friendships. A large number of people travel for interpersonal reasons. There is considerable travel by people wanting to visit friends and relatives. Needless to repeat that for widows, empty nesters, single and many others, travel may provide a mean for simply being with other people.

Spiritual and religious: Travel for spiritual reasons has been taking place since a long time. Visiting religious places has been one of the earliest motivations of travel. A large number or people have been making pilgrimages to sacred religious places or holy places. This practice is widespread in many parts of the world.

Status and prestige: This concerns the ego needs and personal development. Many people undertake travel with a view to talk about it to their relatives and friends. They like to impress them by relating their experiences in the various places visited. They also travel because they think it is fashionable to do so and perhaps, show that they can afford to do it. This can serve as an informal mean of being part of a social group.

Professional or business: Attending conventions and conferences related to the professions, industry or commerce or to some organisation to which the individual belongs has become very popular. The convention travel has made great strides in recent times. Many countries in order to attract more tourists have established convention complexes where all kinds of modern facilities are provided for business meetings, seminars and conventions.

After examining factors motivating travel, two broad distinguishable groups of travellers emerge. The first group consists of those who have to visit a particular place and includes businessmen and some element of those who may be described as common interest traveller such as those visiting relatives and friends. The decision to travel, when and where to go, how much to spent, etc., is to a greater or lesser extent outside the control of this group of traveller. They are also less influenced by price or distance factor. Particularly, business travel is relatively price-inelastic and is not susceptible to price inducements. By contrast, the second group consists of tourists in the pure sense who have a freedom of choice. This group decides for themselves whether they should apply a part of their income and a part of their leisure time to participate in tourism. They also decide for themselves where and when to go. The demand for travel for this group as compared to the demand for the former group is highly price-elastic, that is susceptible to price inducements.

In the following, destination image and how consumers (tourists) make a decision will be examined. As Davidson (1985:106) expressed it "if we are going to influence a decision, a change in behaviour, we need to know how that decision is made. There must be an increasing focus in the research and in planning in our industry (travel and tourism) on how decisions are made. It means we need to know more than demographics. The terrain is in the buyer's mind; not in just who he or she is" (Woodside and Jeffery, 1988 cited from Davidson).

IMAGES AND ATTITUDES OF TOURIST

The image of a place as a pleasure travel destination to both tourist receiving countries and tourists is very important. In fact, image to a greater or lesser extent, is derived from attitudes toward the destination's perceived tourism attributes. Lancaster (1966) suggests that consumers do not choose goods themselves, but rather the attributes are possessed by the goods and consumers use perceptions of attributes as input factors to assess utility. Potential travellers generally have limited knowledge about the attributes of a destination which they have not previously visited. Consequently, the image and attitude dimension of a place as a travel destination are likely to be critical elements in the destination choice process, irrespective of whether or not they are true representations or what that place has to offer. So what is image(s)?

The Meaning of Image

There are various kinds of definitions adopted to describe the word image in different fields. A dictionary definition of image is "the general opinion about a person, organisation, etc., that has been formed or intentionally created in people's minds" (Longman Dictionary of Contemporary English, 1987). A number of authors including Asseal (1984), Chon (1990), Gartner and Hunt (1987), Lawson and Baud-Bovy (1977) attempted to describe image.

Topar (1983) argued that image is the aggregate, or sums, of the feelings, beliefs, attitudes, impressions, thoughts, perceptions, ideas, recollection, and conclusions people have about an object. In addition, image of a place as a tourist destination embodies the abstract quality of tourism offerings of that place. If an image of a tourist attraction is established on biased on incomplete information, it can have negative impacts on that area's tourism development by affecting tourists' choice behaviour. Failing to attract visitors may lessen the potential or actual use of tourist resources and thereby substantially reduce the economic development (Zhang, 1989). This is particularly true for those countries in which tourism is seen as a major contributor to the national economy.

Also, tourism image reflects tourist's expectations and anticipation (Goodrich 1978, Woodside and Jeffery 1988). To a large extent, image describes the degree to which a tourist area can satisfy tourist needs and wants. From this approach, identifying the attributes of an image of a tourist destination will help to find adequate ways of improving tourist quality by rearranging tourism products, revising tourism planning. By doing this, it is expected that more tourists can be attracted and more opportunities created. In brief, favourable images should be reinforced, whereas unfavourable images should be modified.

Besides, image, as a marketing concept is not concrete and precise; it is abstract and complex. Different theories, arguments and opinions exist in different disciplines about how an image is formed. Topar (1983) argued that there were two major theories about where image begins. One theory suggests that objective characteristics of an object determine that object's image. The second theory suggests that image depends on the person viewing the object, based on subjective judgements formed by the perceiver. Topar believed that an object influenced people's perceptions in both tangible and intangible ways. Intangible vehicles include conversations, gossip, worth-of-mouth, or any impressions that come from personal contact with the object. Tangible vehicles include publications, news stories, signs, films, photographs, or radio and television tapes. Gunn's argument (1972) about the tourist image declares that the tourism image has two major components, an induced image and an organic image. The induced image is the impression(s) one will have of an area without having been there. These images are formed through advertising, news reports, information received and processed from friends and relative, and other indirect information sources. Organic image(s), however, are formed through actual visitation.

Having reviewed various definitions of image, one can conclude that: most definitions have indicated that image is a critical factor that affects a consumer's patronage behaviour.

The Importance of Image

As Fakeye and Crompton (1991) pointed out that in many contexts, tourism is a potentially strong economic contributor. Despite the availability of a wide variety of attractions, however, some destinations fail to fulfil their tourism potential because of their negative image(s). Thus, much marketing in tourism is designed to attract people to particular places. Tour operators or national tourist offices wish to develop a favourable image of their destinations in order to encourage a desire to visit those places (Phelps, 1986).

It is commonly agreed that an individual's awareness of the world is made up of experiences, learning, emotions and perception. Such awareness can be described as knowledge producing a specific image of the world. This image will obviously affect an individual's preference and motivation towards tourists, as it will provide a pull effect resulting in different demand schedules. Gunn (1972) suggests that the tourist image is only one aspect of a country's general image. Nobody is likely to visit a country for tourism if for one reason or another he dislikes it. On the contrary, a tourist discovery may lead to a knowledge of other aspects of an economic, political or cultural nature, of that country.

The conclusion must be that images are of paramount importance because they transpose representation of an area into the potential tourist's mind and give him or her a pre-taste of the destination. The images held of such attributes as the natural environment, climate, and people of a destination are likely to detract from, or contribute to, successful tourism development (Hunt, 1975).

Image of Travel Destinations

People react to the world as they perceive it to be, not necessarily as it is; therefore, image is extremely important to destinations. Choosing a destination, or a vacation package, is extremely subjective. It is based on individual likes and dislikes, interests, attitudes, and motives. It is often supposed that a tourism destination can be viewed as one of the products of the tourism industry. It is a uniquely complex product-composed of, among other factors, an area's climate, infra-and superstructure, services, and its natural and cultural attributes- but, nevertheless, a product. It is reasonable to assume that a tourist destination also possesses an image. So what influences the individual's choice of holiday and destination? This depends upon two sets of factors. These are: the personality of the holiday-maker, which determines preferences and goals, and the character of the holiday product which involves knowledge of the holiday opportunities available (Goodall, 1988; Moutinho, 1987).

An individual's image of a holiday, particularly the destination, is compiled from his/her attitudes towards the holiday's perceived attributes. The holiday-maker's attitude is a tendency (which may be favourable or unfavourable) to respond in a consistent way towards an object, in this case the holiday; it is a result of learning and experience (Moutinho, 1987). Attributes of holidays can be both resource-based (climate, scenery) and facility-based (access modes, accommodation), and may be tangible (e.g. mountains, theme parks) or abstract (e.g. cultural, hospitality) properties. Since potential holiday-makers generally have limited knowledge about the attributes of a destination they have not previously visited, the destination or place image is seem as a critical element influencing holiday choice (Goodall, 1991).

Moreover, holiday images are often regarded as place images but they also encompass other product attributes: for example, images pertaining to the type of holiday, such as seaside, activity or adventure holidays which explicitly identify the experience(s) the holiday-maker are seeking.

Place images have been examined for many holiday destinations. For instance, Crompton 1979, Ehemann 1977, Godfrey 1984, Griffith-Jones 1984, Lilly 1984, McLellant and Dodd Foushee 1983, Stabler 1988). Knowing that there is a positive correlation between destination image and visitation allows us to maintain that when an individual has made the decision to travel the choice of destination is influenced by the individual's perception of alternative possibilities. What this implies in practical terms is that image studies can result in direct guidelines to actions which need to be undertaken in order to create a more successful destination.

Arguably, it is worth noting that once the image a destination projects to potential visitors has been determined, it is possible to assess whether that image is realistic, whether is needs to be moved closer to reality, and whether it is easily differentiated from perceptions of other locations with similar attributes. Depending on the outcome, a proper marketing strategy has to be developed in the tourist receiving countries.

It must be pointed out that image building is a difficult task. In the first place, by the nature of the product, destinations are not in a position where they can greatly alter their physical characteristics. Working within given destinations have to try to build their images around unique attributes which give them a competitive advantage and which can be marketed successfully. The second hurdle arises from the fact that a destination is able to create an image only to the extent that it can control the information reaching potential visitors. Tourists are, however, likely to be exposed to numerous informational stimuli about a location, many of which may contradict the information provided by the destination's marketing efforts. In this sense, images are also difficult to build.

Some authors believe that images are not static and they change over time (Gartner and Hunt 1987, Mayo and Jarwis 1981, Pearce, 1982). Since changing a country image is a difficult process involving much time and effort. Destinations cannot greatly change their physical attributes (e.g. landscape and climate), so they must build their images around notable attributes (if they have any) that provide them with some kind of competitive advantage. Tourist attractions should be designed for that particular segment of tourists whose needs are best satisfied by the offering (Fodness, 1990). Diagnosis of a destination's strengths and weaknesses on relevant attributes is helpful in planning tourism facilities and creating marketing programmes (Bojanic, 1991).

The point to be understood here is that travellers and potential travellers hold images of alternative tourism destinations. Hence, destination image is a crucial component of a destination's tourism product. Furthermore, it has been found, tourists' choice of a vacation destination is greatly influenced by his or her perceptions of it. All of this makes a continuous assessment of a destination's image, as it exists in the minds of potential customers, a prerequisite to meaningful marketing strategy and a destination's general capability of maintaining a competitive position in the marketplace (Telisman-Kosuta, 1989).

Role of Tour Operators as Image Maker

A tour operator is defined "to be a company which negotiates with hotels, transportation companies, and other suppliers and combines these vacation components into a package tour" (Sheldon, 1986:352). In the simplest and abstract sense, tour operators have an interest in keeping a destination attractive to its clients. It is common. thus, for tour operators to invest in the destination by providing attractions or other facilities to improve the desirability of the destination. They also produce and distribute detailed information in the form of holiday brochures by which clients can take buying decisions. In these sense tour operators help to built positive or negative image(s) in the tourist receiving countries. However, it should be added that "tour operators can only retain the desired image if the resort is compatible with the market segment they serve. From this viewpoint therefore, the image of specific tourist destination may be in part generated from the image of the tour operators that promote holidays in that area" (Ryan, 1991:176).

On the other hand, Sheldon (1989:470-1) argued that "the type of tourists that the tour wholesaler provides may not be in keeping with the destination's image. It is therefore important for the destination to play an active role in deciding which tour wholesaler should bring tours to the destination". In addition, a destination may experience negative impact from tour operators for example, in the 1980's the philosophy of tour operators' in the UK was "pile it high sell it cheap". As a result of these philosophy tour operators attracted low-income groups/tourists and hooliganism increased in the popular resorts such as Spain and Greece (Holloway, 1989).

Characteristics of Destination Image

Gartner (1993) in his article 'Image Formation Process' points out some of characteristics of destination image. First of all the image(s) of a given destination changes slowly. The speed of change is related to the complexity of the system. A tourism image is made up of many different parts such as the nature resource, the socio-cultural system, and the built environment that serves the needs of tourists.

Gartner and Hunt (1987) investigated the change in Utah's (in the US) image occurring over a twelve year period. There was evidence linking increased visitation to an improved state image although the image of the region in which Utah was located had also improved leading to the conclusion that an improvement in a larger entity, the region, had benefited all states in the region. Further evidence of the relatively long time factor involved in changing touristic image can be found in the study of Crompton (1979) in which he assessed the image of Mexico as a vacation destination.

Secondly, "induced image formation attempts must be focused and long term" (Gartner, 1993:206). As a result of the time it takes to change touristic images any induced image formation programs must be focused on specific destination images and budgeted for long term exposure. If destination promoters have scarce financial resources, or resources fluctuate on an annual basis, they would be better off concentrating their efforts on improving their product (e.g. ensuring quality services) and utilising organic formation agents to promote their product.

According to Uzzell (1984:81) "Advertising is ... informing people of the existence of a consumer product or service, favourably disposing them toward it and changing their opinions, attitudes and behaviour so that they will want to consume that product or service."Since people resist accepting information that differs from that previously held, any induced image change should be based on a long term strategy.

Lastly, it is important to bear in mind that effective image change depends on an assessment of presently held tourism images. Changing an area's image requires knowledge of its current projected image(s) and initiating efforts to move that image(s) in a new direction. Image change efforts are essentially wasted if baseline data establishing the present image position is not known. Understanding images held by target markets is necessary to avoid establishing a new image which moves the destination into a position currently held by an able and strong competitor.

Image Formation

The choice of the right image formation on any given destination, depends on many factors. The first, evidently, is the amount of money budgeted for image development. For many developing countries are unable to use expensive advertisement. On the other hand they can focus on quality service, unique attraction packages (if any), and they can also use lower cost image formation.

A second factor is the characteristics of the target market. The image maker should examine the specific market before setting suitable marketing methods. For instance, if the decision making body is comprised of a family unit, than they can use appropriate forms of advertising for it. Gitelson and Crompton (1983) found family groups were most likely to use media sources for information acquisition.

Thirdly, demographic characteristics should be considered. For instance, Capella and Greco (1987) found that destination selection for people over 60 years of age is greatly influenced by families and friends. Some print media i.e., magazines and newspapers are important information sources for this group.

Another significant factor in formation of image is timing. Sources of image formation, for example advertising, to be meaningful must provide information sources early in the decision process.

Fifthly, it must be pointed out that the type of image(s) projected needs to be addressed. If a strong image already exists, then less money and effort will be required to develop a local area image. Conversely, if a strong unique image, is to be projected, all image formation methods should be considered as important contributors.

Finally, touristic assets in a destination determine the type of image. It is prudent that image should be cover all the country or region rather that a specific product (e.g., resorts).

As a concluding note, it is necessary for the marketer of tourism who is set on promoting a product to know its image as seen by the population it is intended for. For instance, if the Turkish Ministry of Tourism wants to promote the Turkish tourist product in Britain, it is necessary to know what image of Turkey is held by the public at large and particularly the persons who have already visited Turkey from Britain, but also the one held by tour operators and travel agents in Britain.

The systematic investigation of the image of a tourist product makes it possible to determine many points such as; the points of information to be developed (this concerns objective characteristics of the product, which are absent from the image, are insufficient or are inexact). Moreover, the favourable features that need to be stressed, and the unfavourable features that need to be toned down. Additionally, the analysis of the image at the level of the persons who have experimented the product (tourists, tour operators or travel agents) makes it possible to measure their degree of satisfaction towards the product and to establish a forecast of the possible development of the product.

DECISION PROCESS FOR TRAVEL

In the Western countries vacations are increasingly considered to be a necessary part of people's life-style. In fact, holidays have become a major category of expenditure, on which a considerable amount of the household budget is spent. The expenditure is discretionary. In other words, this implies that it can be postponed, foregone, or cancelled in a situation of financial shortage. One may assume that households spend appropriate time and effort on deciding whether to go on a vacation at all: and, if so, on the type of vacation and its destination, duration, mode of travel and cost. The tourist destination selection decision process has been an area widely researched. As Scott and et al. (1978) pointed out that to understand how buyers make their decision in the marketplace, many marketing scholars (such as Foster 1985, Mathieson and Wall 1982, Mouthino 1987, Schmoll 1977, Woodside and Lysonski 1989) have used the theories in an effort to model consumer decision-making.

The Need to Understand Tourists' Decision Making

Tourism enterprises share with firms in all ,other industries the need to understand what their clients want, and to be aware of overall dimensions and trends in their industry. It is a common sense that companies challenge each other in terms of selling and they compete with companies offering similar services. Often their competitors face similar internal costs of operation. Moreover, their potential clients inhibit similar social and economic settings, and competitions have equal access to them. Their business rivals may readily gain an understanding of clients' many common values and aspirations. For most of their clients, as explained above, a decision to spend a proportion of the individual or family discretionary income on tourism experiences inevitable means foregoing alternative purchases.

To be successful in the business life, companies' managers should identify and know their individual clients' preference, and yet they need to take a more specialised view of potential clients. Furthermore, Laws (1991:47) explained that

> "marketing behavioural models desegregate the homogenous price responsive behaviour described in macro-economy theory, and offer alternative perspectives on client' behaviour. This can help a service provider to segment the market, the many potential individual clients can be seen as members of reasonably sized groupings in which people have sufficient features in common to enable a company to develop a coherent range of services to satisfy their varying needs. A segmentation strategy also enables to company to reach each group with advertising communications appropriate to its member".

The Risks on Buying Decision Process

When a consumer decides to buy a product or service to obtain satisfaction of some sort (ownership, use or consumption) expenditure of money is involved. So the buying decision is taken with care since in choosing a holiday individual face a certain degree of risk. Expectations of the levels of service and the enjoyment and benefits to be derived from a holiday may not be fully realised. The degree of risk and its perception varies between individuals and with holiday type and destination. Moutinho (1987:24) defined major types of perceived risk as follows:

1. Functional Risk-the risk that the product will not perform as expected.

2. Physical Risk- the risk that the tourist product will be harmful.

3. Financial Risk- the risk the product will not be worth its cost, either in time or money.

4. Social Risk- the risk that a poor product choice may result in embarrassment before others.

5. Psychological Risk- the risk that a poor product choice will harm the consumer's ego. These risks can be reduced, but not eliminated, by adopting various strategies, e.g. lowering expectations of the holiday, regularly purchasing the some holiday, acquiring further tourist information, relying on government or consumer holiday reports, etc.

Factors Affecting Tourism Decision Process

There are four groups of factors that influence tourist's decision process. First, there are the socio-economic determinants. In other words, the socio-economic status of the person; the resultant influences of this; their personality traits, attitudes and values which establish the motivations, needs, desires. Second, are the characteristics of the destination. More specifically the cost and value of the amenities and attractions offered; type and range of travel opportunities offered; the quality and quantity of the information available on the resort which effect the image of the resort. Third, are all those factors which provide promotional stimuli and thus promotional impact (advertising; sale promotions; literature on the tours offered; recommendations of friends and the travel trade). Finally, there are the other influencing variables. For example, consumers' own past travel experience. Also important is how they see the risks (health, travel, political) that are involved and the time and cost constraints the decision-maker has to accept. All these create the necessary travel desires and the search for relevant information needed to allow the right decision to be made (Foster, 1985).

Holiday Buying Process

The first decision to be made is whether to go on a vacation trip or to stay at home. It was previously argued that in a period of economic recession, discretionary expenditures such as taking a holiday at home or abroad are generally the first to be reduced. When making a travel purchase, a consumer moves through several stages. Mill and Morrison (1992) illustrate these processes as follows:

1. Attention and Awareness: It is important to bear in mind that different communication strategies are appropriate for different stages of the buying process. When deciding whether or not to visit a previously unknown destination, for instance, an individual may at first be unaware of the destination. The destination has, first of all, to be brought to the awareness or attention of the potential traveller. A principal function in communicating to the consumer is to gain attention.

2. Knowledge and Comprehension: The task in the next stage of the buying process is to make the customer goal directed. If the potential traveller's attention has been successfully stimulated, she or he will seek out more information on the destination. In fact, searching information are related to individual characteristics. Persons with a high level of education tend to collect more information, tend to read more about the country or region they intend to visit, and even start to learn or to refresh their knowledge of the language of their vacation country. The attempt is to become more knowledgeable about what the destination has to offer, to comprehend what it is all about. It is important to talk about the destination in terms of the benefits offered.

3. Attitudes, Interest, and Liking: The potential traveller moves to developing a liking, interest, or attitude about the destination. At this stage, the promotion objectives are to create or reinforce existing positive attitudes or images or to correct negative attitudes or images. Indeed, travellers want to find the holiday which best matches their requirements within the limits imposed by what they can afford and the timing of their other commitments.

4. Evaluation, Preference, and Desire: It is likely that after evaluating various alternatives, the consumer will develop a preference or desire for a destination. In this respect, the search for a suitable destination: each destination considered by potential tourists must be evaluated against their detailed holiday requirements. Where the first destination which meets travellers' requirements is selected. In the case, where several destinations which fulfil the requirements' than tourist will choice the best which satisfy his/her requirements. If the potential tourists are unable to find an acceptable destination then they must consider modifying their holiday requirements or they abandon the search and do not go away on holiday (Goodall, 1988).

It must be emphasised that the search process undertaken by a potential tourist seeking a new destination to visit is restricted to obtaining information in a secondary form: namely, tour operators' brochures, official guide books, tourist board promotional literature, advice from travel agents, friend's comments about their holidays. It should be noted also that choice of holiday resorts and the extent of holiday travel depend, for most tourists, as much on the amount of free time people have.

5. Intention and Conviction: At this level in the buying process, the potential tourists are convinced that the benefits of the destination will meet their needs and wants and are almost at the point of purchase.

6. Purchase: If the potential traveller has reached the conviction stage of the buying process, then the purchase will be made. Considerable variety exists in the purchase behaviour of potential tourists with planning and preparations differing between types of tourist. At one extreme is a traveller who. walking along the street, is attracted by a 'cut-price immediate departure package' advertised in the travel agent's window. This tourist makes up his mind on the spot, enters the travel agency, books up, and is away on holiday in a matter of days. Here the planning for holiday is made in a very short time and the decision is obviously made on the basis of existing special knowledge. At the other extreme is a tourist who obtains upto-date information from travel agents, tour operators' brochures, tourist boards a similar organisation and compares prices in detail before having a final decision. In this case the holiday planning approaches a full year with advance preparations for next year's holiday beginning as soon as the previous year's is completed. It is reasonable to assume that in this case once a firm booking is made preparations continue in respect of obtaining additional information on the attraction of the selected resort, e.g. opening times of historic houses or safari parks, routes for scenic drives or excursions (Goodall, 1988).

7. Adoption: The final stage of the buying process is the adoption stage. At this point, the traveller has become a repeat purchaser. To achieve this end, it is necessary to provide a quality experience to the first-time traveller. However, advertising has a role to play.

As can be seen above, several complex relationships are involved in buying decisions for tourism products. It is more than just choosing one product from a large range of alternatives. Decisions entail the selection of a suitable mix of different services offered by several firms in the industry. Considering that holiday makers save (it often involves saving over several months) notable amount of money from their household budget. While holiday expenditure is for a short period of time. Therefore, planning ahead is needed and decisions on holidays have to be made some time in advance of the actual event. The decision requires the collection and study of a considerable amount of information before it can be made.

The individual's choice of holiday is a staged process in which external sources of information are important throughout. Information sources are highly variable and include significative stimuli (e.g. previous visit to a destination), symbolic stimuli (e.g. tourism industry's marketing communications), and social stimuli (e.g. contact with other people) (Goodall, 1991).

FACTORS INFLUENCING CONSUMER BUYING BEHAVIOUR

Consumers make many buying decisions in daily life and their purchases are strongly influenced by cultural, social, psychological, personal and economic factors.

Cultural Factors: Cultural factors are the broadest and deepest influence on consumer behaviour. Culture is a basic motive of a person's wants and behaviour. Cultural values are widely held beliefs that state what is desirable and has some influence on behaviour (Nicosia and Mayer, 1976).

Moreover, social classes in a society play a significant role on consumer behaviour. Since almost every society has some form of social class structure. Social classes are relatively permanent and ordered divisions in a society whose members share similar values, interests, and behaviours. Social class is not determined by a single factor such as income but is measured as a combination of occupation, income, education, wealth and other variables. Marketers are interested in social class because people within a given social class tend to exhibit similar behaviour.

Social Factors: A consumer's behaviour is influenced by social factors, for instance the consumer's reference groups, family and social roles and status. Since these social factors can strongly affect consumer responses. Especially family members probably are the most immediate and continuous source of group influence on consumer decision making. Most people will belong to two families in their lifetime: the family into which they are born and the family they create when they get married and/or have children (Lusch and Lusch, 1987). Therefore, companies must take them into account when designing their marketing strategies.

Personal Factors: A buyer's decisions are also influenced by personal characteristics such as the buyer's age and life-cycle stage, occupation, life style, and personality. People's buying behaviour change over their lifetimes. For example, every baby will consume baby food in their early years, most foods in their growing and mature years, and probably special diets in their later years. Of course their taste in clothes, furniture, and recreation is also age-related (Kotler and Amstrong, 1990).

In addition, it is commonly agreed that a person's occupation affects the goods and services bought. As between different occupation groups' norms, values are distinctive (Holloway and Plant, 1992).

Psychological Factors: Consumer buying behaviour can also influence by psychological factors. Namely; buyers' motivation, attitudes, learning process and beliefs. In fact, motivation can be viewed as a person's needs at any time given. Some needs are biological, arising from states of tension such as hunger and thirst. Other needs are psychological, arising from the need for recognition, esteem, or belonging.

In general, if a motivated person is ready to act, his/her buying behaviour is influenced by how they perceive the environment around them. In fact, all of us learn about a stimulus by the flow of information through our five senses; sight, hearing, smell, touch, and taste. However, each of us receives, organises, and interprets his sensory information in an individual way. Perception is the process by which people select, organise, and interpret information to form a meaningful picture of the world. (Kotler and Amstrong, 1990). Hence, this point should be noted by marketing managers when they want to attract more costumers.

Another important element which influence consumer buying behaviour is the consumer learning process. Since they learn from their experiences in the marketplace, and this knowledge influences consumption decisions. Learning can be defined as the more or less permanent acquisition of tendencies to behave in particular ways in response to particular situations or stimuli (Lusch and Lusch, 1987).

Economic Factors: A person's economic situation will extremely effect product choice. The most important economic influence on consumption is income. Clearly for many groups of buyers the richer they become the more they spend. However, tastes and fashion and the other external factors have a role to play.

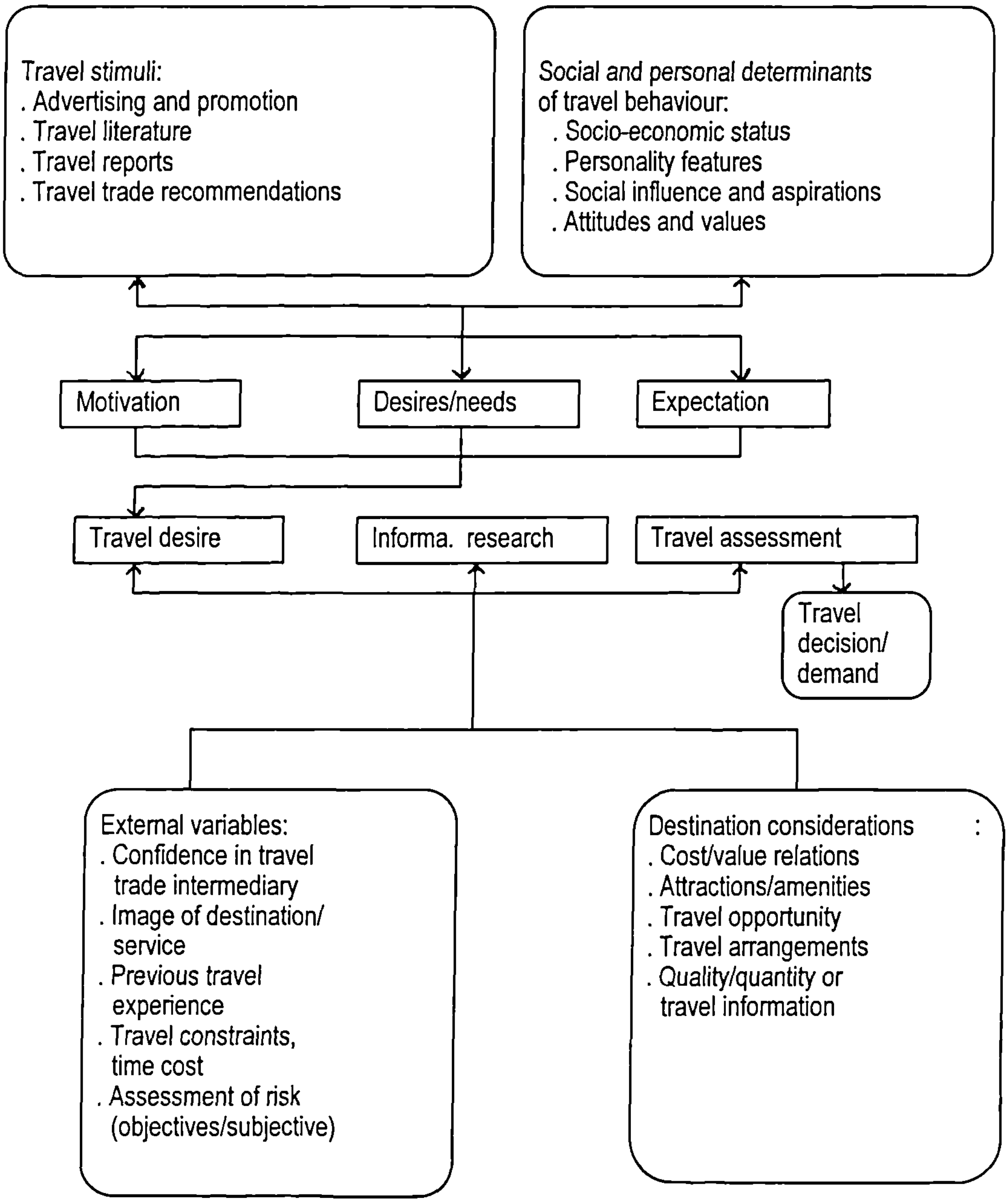
In conclusion consumer decision making is influenced by five broad factors: cultural, sociological, psychological, personal and economic. Cultural and sociological factors deal with the influence of culture, social class, family, and reference groups on the consumer's decisions. Psychological factors are variables that are internal to the consumer's thought processes and include such factors as motivation, attitudes, learning processes, and perceptual processes. Personal factors show that buyer's age stage, occupation, life style and personality probably will influence consumer buying behaviour. Lastly, economic factors are concerned with how a person's economic resources and economic expectations influence consumer behaviour.

Modelling the Travel Decision Model

Travel decision models describe how information is acquired and related in order to make a decision. In the field of marketing, models are not a recent development. They have always been used, often implicitly and informally. Numerous models (Foster 1985, Mathieson and Wall 1982, Mouthino 1987, Schmoll 1977, Woodside and Lysonski 1989) have been proposed in an attempt to capture the different factors affecting destination selection.

The following model (Figure 3.2) is built upon motivations, desires, needs and expectations as personal and social determinants of travel behaviour. These are influenced by travel stimuli, the travellers' confidence, destination image, previous experience, and cost and time constraints. The model has four fields, each of which exert some influence over the final decision.

FIGURE 3.2. TRAVEL DECISION MODEL



SOURCE: Moutinho (1987:24)

Field 1: This field comprises the external stimuli reaching the prospective traveller in the form of advertising messages, travel publications of all kinds, suggestions and comments from friends and relatives, suggestions and recommendations from travel trade intermediaries in response to enquiries.

Field 2: In this field are grouped together the personality characteristics, socio-economic factors, attitudes and values which together determine customer goals, in other words, travel needs and desires, the satisfactions expected from travel and the objective and subjective risks thought to be connected with travel.

Field 3: External variables such as the prospective traveller's confidence in the travel intermediary and the tourist enterprise, the images of competing services and/or destinations, previous experience, cost and time constraints that the prospective traveller has to take into account are grouped in this field.

Field 4: The fourth field of the model shows the destination or service related characteristics that have a bearing on the decision process and its outcome.

As a broad statement, within this model it is introduced to the importance of image. It has been argued previously that the role of a destination image in tourism has a greater significance in marketing when viewed through the framework of the traveller's buying behaviour. In the area of consumer behaviour research, many researchers have theorised that a consumer's buying process is multi-stage and that a consumer's motivation to purchase a good or service is triggered by an expectation that the object of purchase will satisfy his felt needs. The basic position of these multi-stage models of consumer decision making is that a consumer, in making a purchase decision, goes through the stages of need recognition, information search, evaluation of alternatives, choice of product or service, and post-purchase evaluation.

Family Group Decision-Making

In many case people do not go on holiday alone. They take holiday with their family or friends in which case the holiday product must satisfy the needs of several individuals. Persons holidaying together are likely to have common interests and characteristics however, their holiday preferences will not be identical. Therefore, when holidaying as part of a group, an individual's holiday goals will be moderate by the preferences and opinions of fellow holiday-makers.

Family holiday decision-making has been viewed as undertaken jointly by spouses, with some input from the children. The roles of husband and wife may differ, depending upon the particular sub-decision. For example, husbands dominate decisions on information collection, holiday dates, length of holiday, price of accommodation used and overall amount spent, considering decisions on whether to take the children, transport mode, holiday activities, type of accommodation and destinations are joint ones (Cosenza and Davis 1981, Jenkins 1978). The husband's domination of the timing of family holiday is greatest when his wife is not working (Jenkins, 1978). Joint decision-making is most common when the degree of perceived risk in holiday choice is large (Moutinho, 1987).

As for the influences of children in family decision-making, there have been insufficient studies on children's roles in vacation choices, and most of them have been based on parents' reports rather than children's responses. Children's point of view on either vacation decision-making or vacation experiences have been virtually ignored (Seaton and Tagg, 1993). They further argued that involving children in the vacation decision-making process may help the likelihood of an optimum outcome, while not doing so will increase the chance that the children will be one of a small minority who are unhappy on vacation with the family.

Moreover, Gilbert (1991) reports that children learn about purchasing and consumption primarily from his or her parents, the children eventually become a dominant force in certain purchasing decisions. This is an important aspect where teenage children may have to negotiate with their parents to take separate holidays, or influence the final holiday choice decision.

The point to be understood here is that groups of people such as families, when it reaches a joint decision it is important to understand who participates in the decision, and the degree of influence each member of the group exercises. This is particularly significant to everyone in tourism related industries such as travel agents, governments, and private business. As they pour millions of dollars/pounds annually into promotion of travel and tourism, private businessmen involved in promoting tourism, advertising agencies developing strategies to attract vacationers, and marketing managers should all benefit from a better understanding of the vacation decision-making process within a family.

TOURISM MARKET SEGMENTATION

The idea of market segmentation is based on the fact that buyers are basically heterogeneous in their demands, in other words, each has unique needs and wants. Market segmentation is the identification and aggregation of individual consumers coming from a heterogeneous population into groups or segments where the members of the group or segment are relatively similar, but different from other groups (Weber, 1994).

It is agreed that travel and tourism marketing are different from the marketing of manufactured products. Travel is an experience, an intangible product. It is produced and consumed at the same time on site. It is very important for travel and tourism industries to understand that they are marketing an experience. Arguably, travellers who have had good experiences will generate more travellers. Therefore, any organisation, whether public or private, profit or non-profit, has to understand the make up of its market in order to provide products and services which meet client needs and wants (Hsieh and et al., 1994). As it is impossible to be all things to all people. In other words, a single destination cannot possibly serve the total holiday market. One of the biggest mistakes any member of the industry can make is to view the travel market as a homogeneous one and, hence, try to satisfy all travellers with any single product or service. It must identify the tourist market which contains actual and potential holidaymakers who are most likely to respond positively to its particular needs and desire (Goodall, 1990).

Definition of Market Segmentation

Tourist market segmentation is an important element of a marketing strategy. Kotler (1972:166), one of the leading marketing specialist, defines market segmentation as "... the subdividing of a market into homogeneous subsets of customers, where any subset may conceivable be selected as a market target to be reached with a distinct marketing mix". A similar definition of market segmentation is presented by Wilkie (1986).

It must be pointed out that market segmentation is a recognised and universally accepted way of analysing tourism markets. Market segmentation refers to the process by which people with similar needs, wants, and characteristics are grouped together so that an organisation can use greater precision in serving and communicating with its chosen customers.

The process of segmenting the tourism market should be the basis for strategic long term marketing and management decisions. Marketing segmentation is more than a statistical technique used to analyse demand. It should be utilised as a management tool leading to specific marketing decisions. The development of a marketing strategy should begin with the identification of market segments and their individual characteristics. At one extreme, a firm or destination may maximise its marketing orientation by developing a unique product offering for every potential tourist. At the other extreme, the firm or destination may save time and money by offering one basic option to everyone. Although that one option will undoubtedly appeal to some potential tourists, it will not to others. The compromise is to separate potential tourists into segments, each segment having similar characteristics, and produce offerings geared to the needs of certain selected segments.

Assumptions for Market Segmentation

If we are going to segment the tourist market, then there are some assumptions: First, the market for a service like a vacation, is made up of particular segments whose members have specific needs and preferences relative to that vacation. In other words, people have different vacation and travel needs and preferences depending on the particular market segment they are in. Second, tourists can be grouped into different market segments, and each member of that group will have some common characteristics with all other members. Third, a specific destination or tourist experience will appeal to some segments of the market more that other. For instance, a sea cruise can probably be sold more easily to the elderly segment rather that to young single people. Fourth, destinations and organisations can make their marketing more effectively by developing specific vacation offerings for specific segments of the market (Coltman, 1989).

Criteria for Market Segmentation

In order to achieve an efficient use of marketing resources, segmentation should respect a number of conditions. A number of authors including Baker (1991), Davis and Sternquist (1987), Kotler (1972), Smith (1989) have attempted to explain criteria for effective segmentation. A market segment must process the following distinct characteristics:

1. Measurability: The segments must be defined in such a way that we can obtain adequate information about buyer characteristics. In fact, it is worth noting that not all characteristics are susceptible to easy measurement. This can be particularly the case with some psychographic variables or benefits sought.

2. Substantiality: The segment must be sufficiently substantial to warrant the effort invested in it. In other words, it must be big enough to justify the cost and effort of an individual or organisation.

3. Accessibility: The firm must be able to reach the segments through existing information channels; ideally, the channels should allow the message to reach only or predominantly the target audience and not other groups which are not likely to respond to the message. Moreover, there is a link between the segmentation and the instruments of marketing mix (product formulation, promotion, pricing, distribution) which will be examined in the next chapter.

4. Appropriateness: Certain products are generally not appropriate for segmentation. It may not be practical for one supplier to compete against another supplier that already attracts and satisfies a particular market segment.

The Importance of Segmentation

In almost any industry, suppliers need to understand their customers and their needs, with the purpose of delivering products to them most effectively. For a few industries, customers may all be relatively similar, with identical needs. However, in most cases suppliers are faced with a variety of types of customers, each with different needs and motivation, who could be satisfied in different ways by the purchase of a specific product.

By identifying different types of customers, marketers wish to classify them into groups or market segments. These implement marketers to establish common reasons for purchasing a product within each market segment, common consumer behaviour and common responses to marketing activity. It then becomes feasible to target market segments with particular products.

In addition, we have certain economic interest in segmentation within tourism, since various types of tourists, operate under different economic constraints, and make different economic contributions as the result of their tourism activity. Some types of tourists are much more important to destinations and suppliers than others, and so more effort may be used to attract them. Tourism organisations, particularly governments, or its agency may also develop economic or other policies which do not affect all tourists equally (Bull, 1991).

Benefits from Market Segmentation

Nowadays, the tourism market has become increasingly competitive, making it essential to operate the research tools which can generate more correct data for strategic tourism development and planning. Recognising the needs and motives of the various market segments provides the supplier with a very powerful and practical tool for fulfil need/motive satisfaction of the targeted groups. It is generally recognises that few vacation destination areas are universally acceptable and desired. Therefore, rather than waste promotion resources by trying to please all travellers, it should aim the promotional efforts specifically to the wants and needs of likely prospects.

Broadly speaking, market segmentation offers suppliers of the tourist product many benefits. Some of them are: First, they are in a better position to compare market opportunities. They can analyse the needs of each segment in the light of the current competitive offerings and determine the extent of current satisfaction. Therefore, segmentation enhanced management's understanding of the customer and, foremost, why s/he buys. Second, sellers can make appropriate adjustments of their tourist product and marketing appeals. For example, instead of one marketing programme aimed to attract in all potential buyers, sellers can produce separate marketing programmes aimed to meet the needs of different buyers. Third, sellers can improve marketing programmes and budgets based on a clearer idea of the response characteristics of specific market segments. They can allocate funds to the different segments in accord with their likely levels or purchase response. Fourth, for suppliers of the tourist product, it is possible to assess its strengths and weaknesses throughout identifying market segments. Therefore, systematic planning for future markets is encouraged.

METHODS USED TO SEGMENT MARKETS

There are many methods or ways of dividing up markets for segmentation purposes, yet there is no standard classification system for all of them. In the following section will be analysed several methods which are used in practice in the travel and tourism industry. These include segmentation by purpose of travel; demographic; psychographic; geographic characteristics; product or benefit-based segmentation and segmentation by price.

1. Segmentation by Purpose of Travel: One of the most widely used mean of segmenting markets in the travel industry is classifying consumers by purpose of travel. For most producers in travel and tourism, marketing segmentation begins with a careful analysis of the purposes for which customers travel, and use their products. For instance, if the purpose of travel is mainly for business, this obviously requires a range of business oriented travel products.

It is important to distinguish between business and non business, that is, non pleasure and pleasure travellers. Although, there is no uniform system for grouping these travellers, they may be further subclassified. Business travel can be broken down into subsegments such as personal (job-seeking and other nonpleasure trips), regular business, meetings and conventions and incentive travel.

Moreover, pleasure travel can be subsegmented into individual travel and organised group travel. With individual travel, the travellers have made their own trip arrangements even though they may have used a travel agency to help with some aspects. Individual travel is done by individuals, couples, families, groups of friends, and so on. Group travel is typified by group with a common interest that has had its entire trip organised by a third party such as a tour wholesaler (Coltman, 1989).

It is widely agreed that business travellers are different from nonbusiness ones. Experience and research have shown that the business traveller often has different needs and different spending patterns from the nonbusiness travellers. In general, it is believed that the demand for travel service by the business traveller is inelastic with respect to prices, while that for the nonbusiness traveller is elastic. This means that pleasure travels are generally price sensitive, and consequently, the volume of pleasure travellers at any one time is highly dependent on general economic conditions and the amounts of discretionary income (i.e., the amount of disposable income remaining after basic living expenditures are made) that the individual pleasure market travellers have. On the other hand, the business traveller will likely continue to travel even though costs of travel increase. It is also important to bear in mind that in some case; the business travellers are pioneer for pleasure travel. For instance, a business man can participate a journey while he is on business trip.

2. Demographic Segmentation: The second form is demographic segmentation, in which the market is sub-divided into different parts on the basis of demographic variables -age, sex, family size, income, occupation, education, family life cycle, religion, nationality. These data are easy to gather and apply and there is often a high correlation between potential customers' demographic variables and their needs and preferences.

Kotler and Fox (1985) report that demographic variables have long been the most popular basis for distinguishing significant groups in the market place. One reason is that consumer wants or usage rates are often highly associated with demographic variables; another is that demographic variables are easier to measure than most other types of variables.

Demographic factors, in particular; age, education, and income are generally successful indicators of people's propensity to travel and differentiate them from other segments of people who are less likely to travel. In general, travel is highly correlated to income and education levels, as well as to urban living. In other words, rural residents and those with low incomes are less likely to travel.

Despite being the most commonly used method, to identify a segment by demographic factors has some drawbacks. The most discussed limitation of demographic segmentation is that it gives little or no explanation for differences in consumption patterns. There may be basic correlations between certain demographic characteristics and fundamental needs or abilities.

A second aspect, which has become of concern in recent years, is heightened awareness of discrimination. Discrimination by sex, race, religion and more recently age, has been made illegal in many countries. Segmentation on these criteria by businesses may well not be discrimination but, as awareness of these issues develops, businesses must be careful to insure that the application of their marketing policies does not appear to resemble it (Lawson, 1994).

To this end, it can be concluded that it is likely that demographic data will continue to be used in segmentation because they are easy to understand and to apply. However, this method does not provide information about the likes and dislikes of the people defined and therefore needs to be supplemented by psychographic and behavioural information.

3. Psychographic Segmentation: Another method is to segment the market base on psychographic factors. In psychographic segmentation, the market is divided on the basis of social class, personality characteristics, and/or lifestyles. This form of market segmentation can provide more profound explanations of tourist behaviour (Heath and Wall, 1992).

The reason for segmenting buyers on psychological dimensions is the belief that common values can be found among groups of consumers, which tend to determine their purchasing patterns. For example, some individuals are mentally predisposed to seek adventure, enjoy risks and active vacations (Middleton, 1988).

Gathering psychographic information is both difficult and expensive. Psychographic research provides detailed profiles that allow a marketer virtually to visualise the people he/she is trying to reach. It tries to determine why people travel (and why they do not), how they think, what their values and attitudes are, what types of destinations they want to visit and what they want to do while staying in a destination (Weber, 1994). In other words, psychographic data concentrate on how purchasers behave, and people are classified according to their values. Psychographic information provides a unique picture of potential customers, identifying the rewards they seek from their interests and activities and the roles that they define for themselves.

In the use of psychographic segmentation, some caution must be exercised. For instance, even when particular psychographic segments can be identified, it is not always easy to know how to effectively promote to them, and the costs of this type of segmentation research would not make the effort worthwhile if the segments could not be reached by advertising. Besides, these difficulties can often be overcome by combining psychographic data with geographic and/or demographic data to narrow down the segmentation (Coltman, 1989).

As a concluding note, psychographic segmentation is an approach to tourism market segmentation based on personality characteristics of consumers. In contrast to other ways of segmenting the market, psychographics examine the actual motives for travel behaviour and offer answers about why people travel, allowing the tourism managers to focus their efforts.

4. Geographical Segmentation: Geographic segmentation is important and efficient in the travel and tourism sector. Since much of the attractiveness of a tourist destination is based on contrasting cultures, climates, scenery and so on. There are several geographic variables. The most important ones are the regional breakdown and the city size or the degree of urbanisation of a population. These different geographical areas are then evaluated with respect to their potential for growth by examining such matters as their population trends and economic situation.

It is highly recommended to focus all efforts in a few geographical markets rather than to spread the resources into many countries and/or regions for which we do not have the necessary instrument (Vanhove, 1994).

One of the main objective why tourism suppliers use this method is that it is easy to classify actual customers or potential customers by the geographical area where they live and then to market to them on this basis. In marketing, it is essential to know where potential customers live or work in order to communicate with them.

However, there are some disadvantages in this type of segmentation. Actual and potential customers living in any specific geographical area may have wide differences in family incomes, ages and other similar demographic matters. Hence, it is often preferable to use geographical segmentation only in conjunction with one or more of these other methods.

5. Product or Benefit -Based Segmentation: In market segmentation it is important to understand the needs, and wants and motivations of particular customer (tourist) groups. As it is often the case that tourists are looking for experience. This could be an adventure, a taste of history or tradition, living in style for while, or simply, a total escape from the familiar through a change of surroundings and activities. Furthermore, it is generally accepted in marketing that customers are typically seeking particular benefits when they make their product choices. For instance, some business travellers may identify luxury and high levels of personal service, as the primary benefits they seek when travelling away from home. Others may perceive speed of service and convenience of particular locations as their principal benefits.

The assumption in benefit based segmentation is that the benefits that customers seek determine their purchasing behaviour much more precisely than do geographical, demographic, or psychographic factors. With benefit-based segmentation, a supplier must determine what benefits potential customers are seeking from their tourist experiences (Coltman, 1989). It is worth noting that this type of segmentation can be significant particularly to destinations in the sense that their products are based on a comparative advantage for a particular holiday activity.

6. Segmentation by Price: Another method of segmentation is by price. Price ranges are often used in the early stages of segmenting markets in travel and tourism, as in most other consumer markets. When deciding to market new products, or enter a market for the first time, suppliers have to make a crucial strategic choice. That choice largely decides which segments they will be dealing with, and has immediate implications for the nature of the products to be provided and the form of any promotion and distribution.

Broadly speaking, prices communicate expectations of product quality and value to customers; they also communicate images of producers. Once the price of the product is defined, in the context of chosen target segments, pricing strategy governs all subsequent decisions in the marketing mix. To illustrate, if a tour operator decides to compete in the luxury price range, all its services must be organised to deliver the high quality which is implied. Brochures, advertising and all forms of sales promotion, as well as the products and ancillary services available when customers reach their destinations, have to satisfy the target market's expectations (Middleton, 1988).

In summary, from the above discussion on market segmentation, it can be concluded that there is a risk in thinking that there is a specific technique called market segmentation. Indeed, there are a range of techniques which differ in terms of their assumptions and methodologies. In addition, Middleton (1988:76) argued that "segmentation in a rapidly changing business environment is never a static process. New segments emerge as some older ones disappear or are no longer viable as a result of market change. At any point in time, most organisations in travel and tourism will deal with several different segments at the same time". It is also worth noting that due to the feature of tourism in which demand is characterised by a wider variety of motives, desires, and benefits expected from the tourism product, it has become necessary to segment tourism products since it is generally impossible in practice to promote, and satisfy all customers, in the same way.

To this end, one significant conclusion which is emerging is that the tourist customers are heterogeneous and widely dispersed in their buying requirements or buying practices, and this is due to the fact that they can differ in one or more of the variables (his motivators; image and attitudes; sources of information; habits and customs, etc.). In other words, tourism is a product that corresponds to different needs, and these needs might be met by different kinds of tourist supply. Consequently, any tourist receiving country, whatever its attractions can not satisfy all customers in the tourist market. Thus, instead of competing everywhere, tourist receiving countries should identify those parts of the market that are the most attractive and that it could serve the most effectively. This calls for two steps. The first, is market segmentation, the act of subdividing a market into distinct and meaningful subsets of customers who may merit separate marketing programming and efforts. There are five strategic issues that should be considered in applying market segmentation techniques in the field of tourism: what is the target holidaymaker seeking in the particular vacation; the type of holiday that they are seeking; what knowledge consumers have or lack about a specific destination; what, if any, negative image about the destination must be overcome; what assets the destination has versus competition that could be exploited to attract prospects. The second is target marketing, the act of evaluating, selecting and concentrating on those market segments that the tourist receiving counties can serve most effectively.

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Chapter Four

The Tourism Marketing Mix

Introduction

Anyone who buys a tourism product or a service has probably been impressed by a promotional activity, assessed the product offered, considered whether he or she is willing to pay the price, and finally thought how easy it would be to buy it. Each of these aspects of purchase are carefully planned by tourism marketers in an attempt to convince potential and prospective buyers to buy their products. All of these statements are the basic ingredients of the marketing mix, which will be considered in this chapter.

Definitions of Marketing Mix

The marketing mix may be defined as "the set of marketing tools that the firm uses to pursue its marketing objectives in the target market "(Kotler, 1988:71). In fact the concept of the marketing mix was given prominence by Borden (1965) who described the marketing executive as a 'mixer of ingredients'. Borden initially identified twelve elements of the marketing mix of manufacturers, although these were later simplified by a number of authors. McCarthy (1978) simplified the marketing mix to four elements-the familiar four Ps: product, price, promotion and place (i.e. distribution). Each of these elements would in turn have its own mix of ingredients. Therefore, for example, the promotion element involves the mixing of various combinations of advertising, sales promotion, personal selling and public relations.

In the marketing of services; these marketing mix elements are included, but care must be taken in applying the four Ps in a tourism context. Since the characteristics of tourism are somewhat different to many of the product that have been the traditional market. Hence, for instance, the tourist is being sold an experience made up many contributing components, rather than a tangible product. Moreover, the product is not transported to the consumer, but the tourist travels to the destination area where the product is experienced. The costs of transporting products to market are an impediment for most producers, but in the case of tourism the journey may be a positive part of the trip and there may be an incentive to travel. In addition, the producer may be unable to store the product for sale at a later time. For example, the lost opportunities of an unrented hotel room cannot be recouped on a subsequent night.

Similarly, Stanton (1971:575) notes that "because we are dealing with intangibles, the task of determining the marketing mix ingredients for a total marketing programme in a service industry is perhaps more difficult and therefore requires more skill and sophistication than is true in product marketing firms".

It is apparent from literature that some authors believe that some of marketing mix elements are more important that other. Median (1984) suggests that in tourism, product and promotion are much more important than other elements of marketing mix. On the other hand, it is argued that the traditional marketing mix of four Ps is not comprehensive enough for the tourism and hospitality industry. Therefore, a number of analysts redefining the marketing mix in a manner that is more applicable to the service sector. While many have sought to refine the marketing mix for general application (Brookes 1988, Kent 1986) the expansions by Booms and Bitner (1981), Cowell (1984) and Christopher et al. (1991) provide useful frameworks for services marketing. In addition to the four traditional elements of the marketing mix, these authors add the additional elements such as people, process, physical evidence, customer services.

They discuss that these new elements are fundamental to the definitions and promotion of the service in the customer's eyes, both prior to and during the service experience. They can be applied by the firm to influence buyers' responses. Thus, these marketing mix element should be included in the service marketing mix.

In summary, the marketing mix provides a basis for a logical, coherent and orderly analysis of the activities which bear upon the marketing operations of a firm.

The following sections will examine the marketing mix elements separately.

PRODUCT

The Nature of the Tourist Product

The tourist product which the customer (tourist) buys is an amalgam of various components (e.g., transportation, lodging, eating, entertaining, and other activities) that complement each other. These components are usually offered by different organisations and may be marketed directly to the tourist by the individual organisations or combined into a package where the services are supplied by a set of organisations. The degree of success of any component influences the success of all other components. Therefore, the tourism product is an experience which the tourist lives from the time he prepares for his holiday to the time he comes back home (Jefferies 1990, Wahab and et al. 1976).

Berry (1984:30) in his article "Services Marketing Is Different" describes a good as "an object, a device, a thing" in contrast to service which is " a deed, a performance, an effort". The essential difference between goods and service, as noted by Rathmell in one of the earlier contributors to the subject, is that goods are produced, and services are performed (Rathmell, 1974). The point to note above is that goods can be purchased through an exchange transaction conferring ownership of a physical item, which might be used or consumed at the owner's choice of time and place. On the other hand, services can be purchased through an exchange transaction that does not confer ownership but permits access to and uses of a service at a specified time in a specified place.

CHARACTERISTICS OF THE TOURIST PRODUCT

From this short introduction the principal characteristics of tourist products may be summarised as follows;

1. Inseparability

This means that the act of production and consumption occur at the same time (Lomsdon, 1992). Reviewing the literature, Berry (1984), Bhatia (1986), Brown (1988), Middleton (1988), Mill and Morrison (1992), Wahab and et al. (1976), Zeithaml and et al. (1985) emphasise specifically on that issue.

The performance of the service requires the active participation of the producer and the consumer together. In other words, most services production or operations staff have some consumer contact. Obviously, the tourism industry is providing personal service to other people -"people based"- Hence, it is very difficult to have a consistent quality of service in the industry. Since, a wide range of product performance is determined by employees' attitudes and behaviour, for which there can be no guarantees and no prospect of legal enforcement.

2. Perishability

Many scholars including Holloway and Plant (1992), Hudman and Hawkins (1989), Levelock (1984), Moutinho (1989) argued that the tourism product is a highly perishable one. This characteristic of tourism product points out that if service capacity or products are not sold on a particular day, the potential revenue they represent is lost and cannot be recovered. Calantone and Mazanec (1991) give us an example that any unoccupied bed in a hotel or an airline seat -in a specific day- represent a loss which affects industry's profitability and ability to compete. At this point, we come across another characteristic of tourism products is that they cannot be stored.

3. No Possibility for Stocking

As noted earlier, a service is deed or performance rather than a tangible item. A tourist does not buy a bed or a beach or other attractions (Kaiser and Helber, 1978) but purchases a night's lodging in a hotel. Consequently, it is not possible for a services producer to create a stock of products, which can be used to satisfy a customer later on. By contrast, manufacturers of goods, for example, are able to manufacture their products around the year and create stocks. Every single unsold capacity, in tourist industries generate income losses. Levelock (1984:5) put it most elegantly: "unused capacity, in a service business is rather like having a running tap in a sink with no plug: The flow is wasted unless customers are present to receive it. And when demand exceeds capacity, customers are likely to be send away disappointed, since no inventory for backup".

4. Seasonality and Demand Fluctuations

Another important characteristic of tourism product is that its demand is highly elastic, seasonal in character, and influenced by subjective factors such as changes in taste and fashion as well as the more objective factors such as price. There are a number of options available to consumers to satisfy a wide variety of tastes. In many cases, sun sea and sand, for example, can be found in many places around the world and experiences sought can be provided by any number of organisations.

However, it should be added that it is characteristics of most tourism markets where demand fluctuates greatly between seasons of the year. Their main markets are still accustomed to think of summer and winter months, whilst schools and many business year cycles reinforce such traditions. As a result, many tourism businesses fluctuate (Middleton, 1988).

5. Role of Intermediaries

As a broad statement, tourist services are located at a distance from potential customers. Therefore, potential visitors must be well informed before they leave home. For this reason, specialised intermediaries are necessary, in order to bring consumers and services together. Also, the fact that many tourism producers are relatively small means that they cannot afford to set up their own retail outlets (Mill and Morison, 1992).

It is obvious that, in most industries, manufacturers have predominant control over product design, distribution, promotion and pricing. On the other hand, in tourism the travel intermediaries like tour operators, travel agents play a significant role that they can influence which services should be offered, to whom, when, and at what price.

6. Intangibility

The concept of intangibility has a meaning "which by its nature cannot be known by the senses or described though it be felt" (Longman Dictionary, 1987).

Intangibility is an important characteristic of tourist products in the sense that most tourist services cannot easily be measured, touched, smelled, or evaluated at the point of sale prior to performance. It means that many service products are ideas in the minds of prospective buyers. For instance, hotel guests can only assess how good or bad a hotel is after they have stayed in it. Therefore, an element of risk is involved on the part of the purchaser.

However, Shostack (1977) claims those consumer decisions concerning an intangible product will be based on tangible clues that surround it. He further argued that the abstract natures of services require the marketer to focus on making them real.

7. Other Characteristics of Tourist Services

Apart from what has been noted above there are some other characteristics of tourist products. Tourism services are heterogeneous. This means that it is difficult to establish standards for the output, and even harder to ensure the standards are met each time the service is delivered (Guven, 1991).

Furthermore, as is often the case, tourist products are located away from the prospective customer. Thus, the communications methods such as advertising and /or sell promotions are very important in order to bring the consumer to the tourist destinations where the service can be consumed.

In addition, as Moutinho (1989) identified that in the tourist industry large financial investments are required for every tourist establishment. Hence, both the levels of risk and the return of investment are of critical importance to the tourism management.

Last, but not least the influence of external events like the weather. currency fluctuation in tourist destinations is very difficult to predict in advance (Hodgson, 1990). For instance, a holiday taken in a week of continuous rainfall is a totally different product from one taken in splendid sunshine.

PRODUCT PLANNING AND DEVELOPMENT POLICIES

One of the fundamental problems in marketing attractions is product formulation, that is, deciding what the product actually is and how it should be sold. Generally, most firms have objectives to develop a profitable and continuing business. To fulfil this objective, companies should provide products and services that satisfy consumer needs, consequently assuring themselves of repeat business. Product planning is an important component in developing a profitable, continuing business and has frequently been referred to as the five rights- planning to have the right product, at the right place, at the right time, at the right price, in the right quantities (McIntosh and Goeldner, 1990).

As noted earlier that the tourist product is an amalgam of various components which complement each other. Product planning must thus, be approached from the consumer's point of view. Creating the right service or product for tourists are not easy; consumer needs, wants, and desires are continually changing.

The adjustment of the product to meet the consumer requirements depends on the destination attractions. On one hand, a destination country might have many natural assets from which a variety of attraction can be developed, so that the decision has to be taken as to what particular attractions to present, to what markets, at what phase of tourism development, and the extent to which the product can be varied to meet changing market conditions. At the other extreme, a country might have but one main attraction, so it is a question of identifying the markets likely to be interested in that product. So, the extent to which deciding the product mix is an important function of the programming and budgeting process depends on the country's basic tourism assets and its overall objectives and strategy.

However, repeat business in tourism sector may not be guaranteed for a country, even where the place product fulfils all of the tourist's expectation. Since either the tourist prefers a new destination for every holiday or there was dissatisfaction with the holiday experience as a result of something that happened outside the destination.

The Role of the Government in the Development Process of the Tourist Product

Unregulated tourism can cause many problems such as unbalanced social change and economic development; social tensions and environmental pollution; distortion of life styles and cultural decay and so on. Thus, the intervention of the government in the development of the tourist product is important.

It is sensible that before formulation of a tourism policy government or its agencies should take care of some policy areas. Policy-makers should decide the scale of tourism development. Most countries have sought as a policy objective, to maximise the number of tourists arriving in their country. This objective, as noted earlier, has often brought with it considerable problems of economics, social, cultural and environmental.

Moreover, government should decide whether they are wanting integrated or enclave tourism development. Enclave tourism implies a conscious decision to segregate tourists from the general population. This form of development aims to attain the benefit of foreign exchange earnings without the overwhelming of indigenous culture by foreign tourists. For instance, in the 1960s Tanzania favoured enclave tourism developments to protect African culture from overwhelming contact with foreign tourists.

In fact, there is considerable and continuing debate surrounding the role of the government in formulation of tourism policy, most observers would accept that some degree of intervention is essential. In developing countries it can be argued that a greater degree of intervention by government is required to achieve economical objectives. Moreover, in most developing countries government involvement in tourism is required not only to attain long term objectives but to compensate for the absence of a strong and tourism experienced private sector (Jenkins and Henry, 1982).

In the developed countries there is also a need for tourism policy. Government must set out the parameters within which it wants to see tourism develop. It should guide the private sector by clearly indicating what type and volume of tourism is acceptable and in which locations. Governments should interact with levels of local government to encourage tourism in specific regions (Jenkins, 1991).

As a concluding note, as the case of Turkey and most other countries, the reasons for governments intervention are usually threefold. First, to provide infrastructure and other support that normally falls to the public sector. Second, to provide the framework of co-ordination of the whole tourism sector. Third, to encourage and regulate the development of tourism in accordance with the economic and social objectives of the National Plan.

The Problem of Seasonality in Product Development

There is one major and fundamental problem in the field of tourism which is seasonality. (Jefferson and Likorish, 1988). All of the tourism industry components such as hoteliers, transporters, attractions and facility operators all are facing this problem. Since the majority of the population in Europe have been taken their holiday in the summer months, specifically between June and August. It is true for many cities and countries' tourism has been characterised by a single main season. Therefore hotels and other facilities are vacant for the rest of the year, and the staff need to find other employment, or even remaining unemployed for the rest of the year. The growth of peak-season tourism has necessitated waste investments in accommodation and other facilities, which are utilised relatively for a short time.

It is necessary to note that any government in formulating its tourism policy must be aware of this fact and should have ways to overcome this problem. Otherwise they are wasting their investment and foremost they will have the problems of overcrowding and lower standards of services in the peak-months.

The Product Life-Cycle and Product Policy

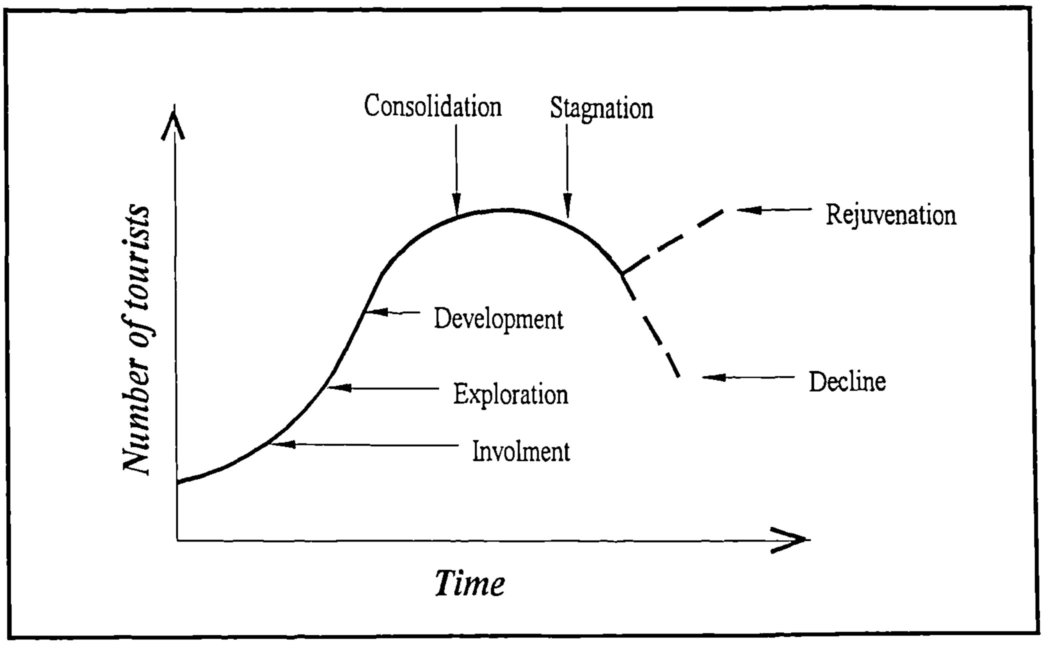
All products, whether industrial or touristic, have a life-cycle which can be short or long. Product life cycle is an important concept within the overall product policy. It supposes that once the product or service has reached the market, it will be subject to a life cycle and will eventually diminish from the market (Teare and et al., 1994). This concept is used for examining product growth and development.

Haywood (1986) points out that the life-cycle concept, to be effective, must be made operational in such a way that it is possible to determine or predict unambiguously the exact position or stage of a tourism offering.

Butler (1980) proposed that the life-cycle concept, when applied to tourism, is comprised of an exploratory stage, an involvement stage; a development stage; a consolidation stage; a stagnation stage; and either a decline stage or a rejuvenation stage. This typical life cycle is illustrated in Figure 4.1.

Introduction stage: New products are generally costly to produce and may have some problem during launching period. Product quality is vital during this stage, as failures during trial of a product can lead to long-term buyer rejection, so at this stage of the product's life cycle require high promotional expenditures, in order to create appropriate customer awareness of the product (Cannon 1986, Roberts 1993). Moreover, at this stage sales tend to be slow, limited distribution. company losses (due to costs not yet recovered) and there will be high percentage of failures.

Figure 4.1 Product Life Cycle



Source: Butler (1980:7)

Growth stage: At this stage, the product has been tested and some of the launching problems have been resolved. The product is now more reliable and more readily available. People now start to see the benefits that can be gained by using the product (Porter, 1980). Sales start to increase and, if the planning has been correct, so do profits. This is characterised by more competitors start to enter the market with the similar product. Promotional expenditures remain high and emphasis on the brand or trade name.

Maturity stage: Generally this is the longest stage of the life cycle, the product becomes mature and well established in the market place. The volume of sales may still be increasing however, at a much slower rate; they are levelling off. At this stage of the product's life cycle, many outlets are selling the product or service, and they are very competitive, especially with regard to price, and firms are trying to find ways to hold their share in the market (McIntosh and Goeldner, 1990). Moreover, promotional activities are directed at reinforcement of the message in order to encourage repetitive buys.

Saturation stage: By this time, in the market place there are too many competitors and no further growth. Sales volume reaches its peak. Mass production and new technology have lowered the price to make it available to almost everyone.

Decline stage: There are factors such as competition, new product innovations, changes in customer preferences may bring the product or service to a decline stage. It is important to note that many products or services can stay at the saturation stage for years. At this stage, it is obvious that demand drops, promotional activities are lower, and there are usually smaller number of competitors. At this stage, a decision should be taken whether to leave the market and concentrate resources on new markets or try to rejuvenate sales.

As a concluding note, each product has its unique life cycle. In some cases, this pattern of growth-maturity-decline may be quite rapid while in other, the product can sell at saturation level for a very long period. Clearly, the marketing manager must be aware of what stage in the life cycle the product. Moreover, this generalised approach is still preferred by marketers since it has a simple appeal and many products actually exhibit this pattern of performance.

The Importance of Product Life Cycle

Palmer (1994:137) argues that the importance of the life cycle concept lies in the recognition that marketing activities for a service are closely related to the stage in the life cycle that a service has reached. He further argues that

> "promotional planning is closely related to the life cycle, with emphasis typically placed in the launch phase on raising awareness through public relation activity, building on this through the growth phase with advertising, resorting to sales promotion incentives as the market matures and becomes more competitive, and finally possible allowing promotional activity to fall as the service is allowed to go into decline".

Moreover, in a similar way, pricing decisions and distribution can often be related to the stage which a service has reached in its life cycle.

To the national tourism organisation there is value in knowing where its place product lies with respect to the stages of the product life cycle since this will influence marketing strategy and product policy. At the beginning stages of the cycle, the national tourist organisation's activities try to inform tourists of the existence of the new place product; with the growth phase marketing's role becomes increasingly to persuading more tourists to purchase that place product, and during the maturity stage emphasises and reminds tourists of the brand image. At some point during this letter phase attention turns to product policy as the place product needs to be found new markets, revitalised or replaced. Moreover, the national tourist organisation has an important role to monitor the country's product quality and its price competitiveness in this context (Goodall, 1990).

Conclusion

From the discussion in this section, it can be conluded that the tourist product is an amalgam of tangible and intangible elements centred on a specific activity at a specific destination. It comprises and combines the actual and perceived attractions of a destination, the facilities, and the destination's accessibility, from which the tourist buys a combination of activities and arrangements. Suppliers of the tourist facilities provide only parts of the tourist product, and the co-ordination among them is very important.

Furthermore product planning in tourism, as for any products or services, is concerned with the consideration of demand for products. It is also important that product planning should involve analysing and assessing consumer requirements (existing and prospective) and identifying homogeneous groups of potential purchasers for specific tourist products.

It has been generally recognised that the tourist authorities should strengthen their supervision over the tourist suppliers through legislation and administrative regulations. The objective of such action on the part of the tourist authorities should be ensure an adequate standard of services offered.

The product life cycle is an important concept within the overall product policy. It explains the stages through which a product generally passes. This concept is a guideline for companies especially when they want to plan or modify of a product. Although the exact duration of a product's life cycle cannot be forecast, all products exhibit characteristic life cycles, which are introduction, growth, maturity, saturation and decline stage.

PRICING

Pricing is one of the important marketing decision since price determines how consumers perceive the product. It is also strongly affects other elements of marketing mix. Meidan (1989) stressed that tourism pricing is a very complex decision, as it is involve the high degree of competition in certain tourism markets, and difficulties in accurately forecasting the level of demand. Moreover, due to the special characteristics of this industry; and also due to factors such as weather, terrorism, strikes, etc. pricing is a complex matter. Therefore, there is no one universally accepted pricing method, and the approach can vary considerably from one tourism organisation to another.

PRICING POLICY

In the simplest and abstract sense, policies are plans for the future direction of the business. A firm's price policy therefore appears in the marketing plan as an indication of the company's objectives in setting prices. In classical business theory, the reason for being in business at all is to maximise return on investment.

It must be pointed out that establishing the right pricing policy for the business is an important strategic decision. Fewell and Wills (1992) believe that the price we set for our products or services makes a major statement about how we wish those products and services to be perceived by our customers. Moreover, pricing policy has to achieve a number of important roles. Firstly, company's activities should meet its customers requirement and secondly, company should ensure that the many costs of production, service and distribution costs are recovered. Thirdly, firms should have enough profits in order to achieve its economic, social and environmental objectives.

Whatever pricing policy is employed, an organisation has to take into consideration the potential tourist's perceptual assessment. In deciding to buy a product or service a consumer has to be willing to give up something so as to enjoy the satisfactions that the product will offer. Indeed, the majority of tourist are looking for value when they buy a product or service. If a consumer accepts that the quality of a product is good, s/he will be willing to make greater sacrifices in order to purchase that product. The point to be understood here is that pricing policy ultimately helps to determine the success or failure of a product in the market place.

Price Decisions

Generally speaking, companies have choice of three strategies in pricing their products. First of all, they can decide to sell their product at the market price, which is the same price that everyone else charges in the market. Selling at a price equal to competitors' tends to prevent price cutting. More importantly, customers are not driven away by price therefore, firms compete on non price terms.

Secondly, companies can decide to price below the current market price. Adopting such a discount policy, firms are tying to create the reputation of having the lowest prices and underselling all competitors. To be successful in this strategy, companies must make sure that demand is elastic (i.e. it is easy for a customer to switch from one supplier to another or choose between very similar offering); otherwise, they will gain only at the expense of their competitors and start a price war.

The third approach is to charge above-market prices. Premium pricing strategy should be coupled with the best service in the industry and other feature and amenities to make this higher price attractive. Such an approach emphasises quality, which many consumers pay for it; generates more revenue for promotion; and makes better service possible (McIntosh and Goeldner, 1990).

Pricing in the Tourism Sector

Price is a critical variable in the tourism marketing mix. The right price must both satisfy tourists and meet the profit objectives of tourism businesses. Generally, price plays as a primary signal of quality and accessibility for consumers. When comparing with similar purchases their relative prices act as an indicator of what to expect from each product.

There are numbers of factors which direct the pricing policy in the tourism sector. These factors come from product characteristics which we saw previous section. In fact, prices for tourism products have to take into account the complexity created by seasonality of demand and the inherent perishability of the product.

Obviously, the firm's main source of income to cover costs of production is revenue from sales. As revenue is a function of both prices charged and the volume of sales achieved, management have a set of related decisions to take. Economic theory indicates the strong likelihood that sales volume will decrease as price is raised (Laws, 1991). Due to the fact that tourism industries have fixed capacity and high fixed costs, but the direct cost of serving each customer is relatively small. The objective of pricing tactics is to match demand to supply, generating revenue to cover costs and to ensure profit over a time period.

Witt and et al. (1991) argued that the crucial strength of pricing policy is the ability to differentiate on prices. Ideally, different prices should be charged to each group or individual, with a different price elasticity of demand. To achieve the price discrimination, the firms need to have a clear view of segmentation possibilities. In this context, Gratton and Taylor (1992:134) stresses that

> "the main thing to remember about price discrimination is that in order to get it to help in the achievement of objectives the leisure manager must work out as precisely as possible what effects changes in prices for different sub-markets have on the separate demands. At the very least this means monitoring closely the exact effects of any price changes, which helps the manager to identify the nature of demand for his product. In addition it may be appropriate to conduct market research to establish the importance of price in the consumers' decision making and the strength of demand at different times, activities, facilities, etc."

Price discrimination can exist when there is no adequate future markets, which is generally the case in tourism markets.

It is likely that cheap countries, are not necessarily the most attractive, despite the fact that the total selling price is one of the most important influences on the number of tourists who choose a specific destination. In other words, prices are not the only determining factor. If the country lacks enough facilities, its cheap prices will not be so much of an advantage.

FACTORS INFLUENCING PRICING DECISION IN TOURISM

As a broad statement, an organisation's objectives determines the desired outcome of pricing policies. It has been repeatedly said that the touristic product cannot be stored for future use, this means that an unsold service or product is revenue lost, which cannot be used later. This will influence the profitability of the tourism organisations, and affect pricing policy. McIntosh and Goeldner (1990) explain the factors which influence pricing policies as follow:

1. Product quality: It is generally recognised that there is a direct relationship between product quality and the customers' perceived value. If this relationship does not exist, consumers will not buy. Moreover, a product which offers greater utility and fills more consumer needs than a competitive product can command a higher price.

2. Product distinctiveness: A standard product with no notable features offer little chance for price control in the market place. But, a novel and different product is likely to command higher prices.

3. Extent of the competition: In making pricing decisions any supplier of tourist organisation has to be aware of the state of competition that exists in the relevant market, specially competition for the same service or good. It is true that the product's price to a certain degree determines its position in the market place.

4. Method of distribution: Distribution channels in the tourist sector are different from other industries. Therefore, when the tourist products or services for example, airline seats or hotel rooms, are heavily marketed through travel agencies the commission to be paid to the travel agency should be a consideration in pricing.

5. Character of the market: Before deciding any product pricing, it should consider the type of and number of possible consumers. If there are few customers, then a higher price may have to be charged to maintain profit margins.

6. Cost of the product and service: It is reasonable to assume that "in most investments in touristic facilities, up to 90 per cent of the capital is invested in fixed assets" (Median, 1989:305). Therefore, the level of fixed costs is very high with regard to other industries. Moreover, the quality of the product or service of the tourist industry depends, to some degree, on the number and quality of the staff employed. All these aspects affect pricing decisions in the tourist industries.

7. Seasonality: It is widely agreed that most tourism products and services are affected by seasonality. Specially, this is an important consideration in the family vacation market in which school vacations cause high demand at certain times. Hence, the seasonal aspects should be considered in developing prices.

The Importance of Prices

In economic theory the demand for any service or product depends on its price. Indeed, price is the device through which the firms seek to attain its profit objectives. Selecting the right price for a given service or product is necessary for the ultimate profit to be attained. On the other hand, the wrong pricing decision might lead to a marketing failure. What is important here is that, the price must be satisfy both the users of services or products and tourist organisations.

In addition, a tourist country's market share and its competitive position are influenced by its price. The tourist firms are also faced with higher labour costs, competition in the international market and increasing price competition in the markets. These show that why price is vital to a tourist firm as well as the tourist country as a whole (Kassem, 1985). Moreover, tourism pricing affects future demand. Hence, it should correctly measure the sensitivity of its potential customers to changes in price.

The Significance of the Tour Operator in Pricing

It is recognised that tour operators are interpreters of demand. It is true that tour operators choose destinations where they can have a satisfactory profit. The principal characteristic of the inclusive tour is that the tourist is able to buy for a single price a holiday much cheaper that if s/he bought the components of his/her holiday separately.

To the large extent, the tour operator has a powerful negotiating position in most developing countries, as they can influence where tourists spend their holidays. In the case of any increase in price of hotels bed or other component of the package, the tour operators may switch the destination from one area to another. It is in this sense that the destination is irrelevant. The tour operator designs a programme offering certain standard components and markets it principally on the reputation of his brand name and the assurance of quality.

To a certain degree, however, hoteliers benefit from the low prices put by the tour operators, since a high rate of occupancy is secured. On the other hand, a low level of manpower remuneration is achieved which causes serious problems to the economy of the country as a whole. This results from the fact that the hoteliers, with the purpose of achieving the low prices asked by the tour operators, may reduce the quality of the services they offer or even pay lower salaries to the people they employ. Either of these actions creates serious problems to the country's efforts to develop the tourist industry.

On many occasions the hoteliers reduce their prices to a level that they might find themselves unable to operate at a profit, as a result of the pressure from the tour operators exercise on the hotelier to reduce their prices. Consequently, many hotels are leased to foreign investors or a tour operator.

Another important problem of the country's tourist industry is that of over-booking. This problem is based on the ability and right of the tour operators to make a cancellation as late as two weeks before the group arrives at the destination. On the other hand, the hoteliers, by expecting a certain number of cancellations sell more beds than they actually have, so that they can cover their losses from these cancellations, specially during peak period.

In short, tour operators have the power not only to achieve low prices for hotel beds and other component of the package, but foremost to direct the tourist flows. In other words, they can create and direct the demand for international tourism.

Pricing Strategies for New Tourism Products

In developing a price strategy for a new tourist service, there are two broad strategic approaches, namely skimming pricing and penetration pricing. Dean (1979) proposes that three factors determine the new product price. This is, getting the product accepted; maintaining the market in the face of growing competition; and producing profits. Furthermore, Cannon (1986) added one more factor that is the involvement of the government.

Skimming Pricing: As the name suggest, a price skimming strategy sets the price as high as possible. Tourist firms only concentrate on the top of the market. The objective of this strategy is to sell to the maximum number of customers possible. This strategy is often possible with a brand new product that the customers who demand it just cannot do without and will pay a high price for. Skimming price strategy should be apply when the firms want rapid repayment of development and promotional costs. In addition, skimming is appropriate when there is high price inelasticity, no close substitution possible, and a definite market segment that will pay the price (Coltman, 1989).

Penetration Pricing: This strategy takes the reverse approach to price skimming. It is adopted when a company wants to establish itself quickly in a market. For example, tour operators, when setting up an operation to a new destination, can use market penetration pricing for that destination in the first couple of years. In this respect, prices are set below those of the competition so as to maximise market share or penetrate the market (Cooper and et al., 1993).

One of the major problem with this method is that it might be difficult to increase prices later. Accordingly, profits, and return on investment, may be permanently low. Penetration pricing can be used when there is high price elasticity, and high demand for the product or service.

Conclusion

Pricing is one of the most important elements in the tourism marketing mix. It signals to the customer the nature of service on offer. It is in this sense the individual makes a judgement as to whether the price is in an acceptable range. Hence, pricing decisions are fundamental for the profitability of the tourist organisation, as it has immense impact on demand and sales volume.

In addition, the right price should both satisfy tourist and meet the objectives of the tourist firms. However, one can argue that many tourist organisations may not have enough freedom to change its prices, due to the fact that in many countries, governments through the official tourist organisation or agencies control hotels prices and other fares.

In tourist industry, pricing strategies vary according to the practical considerations and constraints, such as; the policy aim of selling up market to an elite or down market to the masses; the policy aim of filling empty capacity in the off-season, with the purpose of covering overheads; the policy aim of introducing new product in the market at low prices, in order to gain acceptance; the policy aim of competing on price with the other countries or organisations.

It is worth noting that, although the pricing element is the most significant, one of the marketing mix in terms of profitability, pricing can not be seen in isolation for the other elements. Pricing should be viewed as an integral part of the market process and the inter-relationship with the other elements in the mix, must be taken into consideration (Median, 1989).

The conclusion should be that "pricing like any other policy weapon, will be used to achieve the goals of the company: profitability, growth, market share, return on investment. The goals will vary according to prevailing demand, competitors reaction and the strategic situation of the company" (Witt and et al., 1991: 96).

PLACE (DISTRIBUTION)

The third element in the tourism marketing mix is variously characterised as place or distribution. Due to the fact that, the distinct characteristics of the tourism product have led to specific forms of distribution. As tourism products can not be transfered to other places, therefore, consumers should come where the product is. Moreover, the tourism product and service can not transfer to the consumer; the service is simply rented or consumed.

A definition of distribution system can be found in the study of Cooper and et al., (1993:260). They defined as "the channel used, or means by which a tourism supplier gains access to the potential buyers of the product". Here it is important that tourism marketers should choose channels which are consonant with the other element of tourism marketing mix (Cohen, 1989a).

It should be pointed out that the distribution system is concerned with ensuring that the right product reaches the right customer. As competition increases, the importance of the distribution system grows equally as a successful distribution policy will ensure that the product is visible and accessible in the market place.

The Objectives of the Distribution System

Broadly speaking, the basic aim of the distribution system is to bring the product or service to its market. In other words, it establishes a link between supply and demand, the tourism firm, and the traveller. The distribution system makes services and products available to customers. Admittedly, in tourism, distribution is different than in other industries. There is no physical distribution, because the items sold are usually intangible. Unlike in manufacturing, the tourism product and service can not be physically packaged and transported to the traveller, nor can it be held in inventory for any other time. Therefore, the consumer becomes part of the production and consumption process.

Distribution Policy in the Tourism Sector

One of the notable factors which helps the consumer makes his or her buying decision is the availability of the product in the market place. It is generally recognised that in tourism, the product sold may be a single element or a combination of several. To distribute those product to the consumer, the tourism organisation must decide which channels of distribution they will use, and their comparative costs. In fact, there are number of choices for tourism firms. For instance, they can sell their product directly to the consumer or through a travel agent. Another decision should be taken is that where middlemen are used, the firm must also decide on the commission to be paid (Wahab and et al., 1976).

Factors Determining Distribution Policy

When deciding a distribution policy, certain factors need to be considered by tourist organisations. Some of these factors would be the locations of points of sale, cost of distribution, effectiveness in generating sales, and the image of the company. It is important for tourism firms that they should select their target markets. In selecting potential tourist markets, customers' living and working places are important indicators for the tourism organisation. Remembering that the distribution system should be efficient and positive. It should push the organisation's product through the distribution chain and create the right image for product and company (Foster, 1985).

Characteristics of the Tourism Distribution System

It was previously argued that the tourism product, unlike manufacturing products cannot be packaged and distributed to the consumer, nor can it be held in storage. While eliminating some of the functions and problems of transportation and depoting, additional pressures are felt in the tourism context. The hotel room or airline seat not sold, that sale is lost forever.

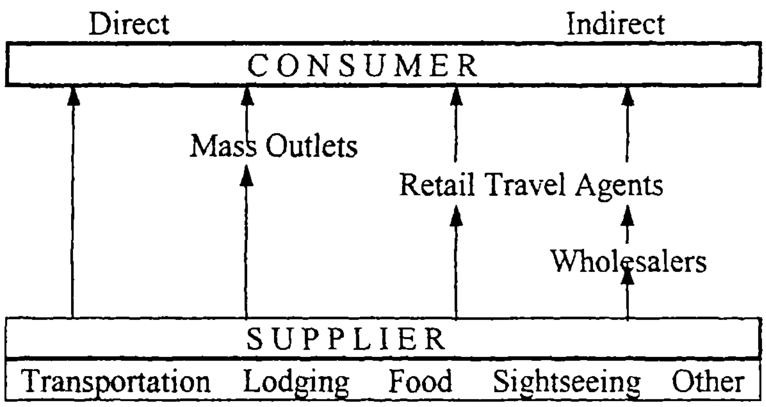
Referring to distribution, Mill and Morrison (1992) noticed that in the tourism industry, more than in any other industry, sales intermediaries have a strong influence on travellers' purchase decisions. A dominant role of the intermediaries is the packaging of a number of complementary tourism products and services to achieve a vacation experience for the consumer.

In general, travel agents book airlines seats, hotel rooms, sightseeing excursions, and rental cars and provide packaged vacations in the form of foreign independent tours. Tour operators buy these components into packaged vacations and offer these for sale through travel agents (Heath and Wall, 1992). One can argue that the tourism distribution system is different since it includes these unique intermediaries with unique roles.

The Tourism Distribution System

Mill and Morrison (1992) claim that airlines, transportation providers, suppliers of the tourist attractions and destination marketing face a two-step decision process when selecting their distribution mixes. First of all, they must make a choice of distribution channel and secondly if they chose indirect channels then they must select specific travel trade intermediaries.

FIGURE 4.2 The Tourism Distribution System



Source: Mill and Morrison (1992:472)

Distribution can be direct or indirect. The former occurs when a carrier, supplier, or destination marketing organisation sells directly to the traveller and the latter one occurs when the sale is made through one or more travel trade intermediaries. This results in a rather complex distribution system as can be seen in Figure 4.2

The Distribution Role in the Marketing Mix

Clearly, the tourism distribution system is one component of the marketing mix. In the tourism sector, the distribution decisions should be made as an integrated part of the overall marketing mix. Once target markets have been selected and marketing objectives established, an appropriate marketing mix is chosen. As previously noted, the overall goal of the marketing mix is to reach target markets and fulfil the stated objectives for these markets. It is worth noting that the distribution system chosen affects other components of the marketing mix. For instance, the services offered might have to be adjusted to meet the specific needs of travel intermediary. If an airline seat is distributed through a tour operator, the schedules and other specification of the aircraft may have to be adapted to meet the tour operators' requirements.

Promotional activities of the tourism organisations also need to be adapted to suit the choice of distribution channels and intermediaries. Travel agents do not have any inventory of tourist service and products, therefore, there is little or no need for them to promote specific destinations. It is the destination marketing organisation, transportation companies, and the suppliers of products and services in the destination are reliable from promotional activities. On the other hand, tour operators carry an inventory of airline seats, hotel rooms, and other tourism services. In most cases, they have a prior agreement with airlines and individual suppliers in destination areas and are often willing to share the costs of promoting the destination with the purpose of selling the maximum number of tours. As is often the case, airlines and suppliers of services, the promotional expenditures are shared. Often this results in joint advertising or other types of co-operative promotions.

Moreover, the pricing of the supplier of tourism services is also influenced by the distribution decision. For instance tour operators have a choice, they can either distribute directly to the traveller or indirectly through a travel intermediary, as they buy in mass, for example 'blocked' reservations with hotels or airlines, most probably they receive lower rates.

Travel Agencies

It would be fair to say that the travel agents have an important place in the tourism industry as they provide the link with the customer. In fact, travel agencies have no product for their own to sell, only the quality of their services. Therefore, travel agencies are to a large degree dependent on the tour operator for their continued existence. Any changes in the business arrangements between tour operator and travel agent, for example, withdrawal of product, pricing policies, methods of distribution will cause significant pressure on the travel agent (Buck, 1988).

It is worth noting that the role of travel agents in the distribution system in the tourism sector is to provide a suitable location for the travelling public to seek out information about travel, to make reservations and to buy their tickets (Holloway and Plant, 1992). In other words, it can be said that travel agents generally have three roles: counsellor decision maker, in which role he actually helps people to decide when, where and how to travel; sales-person, in which he reaches out and promotes travel that may not otherwise occur; clerk, in which he simply processes requests for specific air tickets or room accommodation without substantial interaction with the traveller.

The importance of travel agencies differs from one country to another. While in some of the developing countries they play a secondary role since they have limited scope of activities, they are an important economic instrument in developed countries and in particular the main tourist generators countries. Whatever their role, it might be said that the travel agents are a mirror of the travelling consumer's desire, wants and attitudes, and play an important role in influencing the traveller.

Tour Operators

It has been proposed that "the tour operators acts as an intermediary between the suppliers and the travel agent, or the suppliers and the consumer" (Sheldon, 1986:352). It is often supposed that tour operators' role in developing countries is more important that developed countries. Since tour operators bring tourists to the host county, and they exercise significant influence over the tourism sector and foremost the country's socio-economic development in general.

To some extent, it is true that developing tourist receiving countries are dependent on overseas tour operators for their tourist supply. In this respect, Jenkins (1980:26) argues that "tour wholesaler acts as a catalyst of demand- he interprets the market needs of his clients and packages these needs into destinations. His influence on the direction of demand is particularly significant to the long-haul, relatively expensive destination- i.e. most developing countries".

Tour operators in the developed countries may use their marketing power to encourage tourists to choose particular hotels and or countries, according to the profitability of the location. It is this flexibility on the part of tour operators, arising from the absence of long term financial commitments in the destination countries, which gives rise to the greatest concern among developing countries and strengthens the likelihood of dependence. This is particularly so in the case of some countries which have invested considerable sums in tourist complexes.

Developing countries need tour operators for several reasons. Firstly, tour operators being in the travel business are equipped with first hand knowledge of the market situation. Secondly, tour operators increase occupancy rates and reduce promotional costs for tourism suppliers in tourist receiving countries. It is reported that National Tourist Organisations in most developing countries are short of funds to promote the country. Thirdly, tour operators organise package tours aimed at cutting the cost of travel and making holiday easier to be undertaken for the consumer.

The contribution of tour operators in introducing and encouraging travel to new destinations, particularly, in developing countries, can not be underestimated. It is reasonable to assume that without them, new destinations would never be considered by potential long-haul travellers.

The Role of the National Tourist Organisation in the Distribution Policy

It has been proposed that National Tourist Organisations should involve in the distribution sector. There are several ways that National Tourist Organisations can play a more active role in the distribution. For examples, National Tourist Organisations can co-operate with tour operators at the programme planning stage, by suggesting new itineraries and localities where tourist facilities are available but under used.

Moreover, more intensified co-operation between the National Tourist Organisation and the national airline is a further avenue towards a more active distribution policy. Joint National Tourist Organisations/Airline offices in the major market centres would not only result in savings through commonly used facilities and staff, they would also enable the National Tourist Organisations to become more directly involved with the travel trade.

Conclusion

The distribution system in tourism marketing mix is a major consideration since it is important that the tourism firms' offering are made available and accessible to the target markets. Distribution decisions concern about what distribution channel(s) can and should be used to give the consumer (i.e. tourist) the most effective access to the tourism products. Presumably, the distribution decisions affect the other element of the marketing mix, and product, price, place and promotion, should be harmonious with each other.

Developing tourist receiving countries are dependent on overseas tour operators in ways that can not be changed in the near future. Large tour operators have the power to direct considerable flows of tourists to particular locations, by organising package tours aimed at cutting the cost of travel and making holidays easier to be undertaken for the traveller.

The interests and objectives of the National Tourist Organisations (NTOs) and the travel trade can not always be in harmony and that conflict is at times inescapable. Nevertheless, considerable co-operation scope exists for an intensive and more effective co-operation between NTOs and the travel trade.

PROMOTION

One of the main factors affecting tourist flow to a particular destination is promotion. Both developed and developing countries have acknowledged the crucial importance played by tourism promotion. Any tourist development strategy without the inclusion of promotion is likely to result in failure since the tourist product can not be sold unless it is properly promoted and marketed. Developed countries, nevertheless, are better able to promote their products in the main generating markets than the developing countries, due to the factor of less financial constraints (Wing, 1989).

As a broad statement, promotion is used to cover every method of communication between seller and existing and potential customers to convince them to buy the seller's products. In the case of tourism promotion, it is persuading tourist to travel a particular destination. In other words, working to attract visitors to a particular country, region or town. Clearly, it is not usually enough for a destination to have beautiful scenery, comfortable hotels, a variety of tourist attractions and well established transport networks. People need to be told about the destination and encouraged to visit that one in particular, rather than any other place. Hence, tourism promotion is concerned with making potential visitors aware of a destination and persuading them to choose it in preference to any other (Davidson, 1989). On the other hand, the important groups which need to be influenced by the promotional activities are not only the target market group of current and potential customers. There is the need also to influence trade contacts for instance, tour operators, travel agents and other suppliers, as well as opinion former such as journalists and travel writers.

TOURISM PROMOTION MIX

To achieve bringing a tourist product to the notice of actual and potential customers, stimulating demand and convince them to buy the tourist product, promotion mix is used. In general, promotion mix i.e. marketing communications mix, is composed of four major elements namely, advertising, personal selling, public relations and sales promotions.

In short, advertising covers paid communication through mass media and more direct forms of communication such as direct mail. Personal selling refers to one-to-one communication, for example travel agent suggesting tour destinations to a customer. Public relations comprise promotion which has not been paid for, such as articles in travel sections of newspapers or magazines. Sales promotion is generally defined as promotional activity not fitting into the other categories. It includes activities designed to generate an immediate response from the audience, such as special price discounts (Cohen, 1989b). It is necessary to note that each element of the promotion mix should complement each other and communicate similar or at least non conflicting messages to each target market(s).

In the next section tourism promotion mix will be examined in a wider context.

ADVERTISING

As defined by Teare and et al. (1994:41) advertising is "a deliberate and pre-determined form of communication. The firm spends money to communicate with the marketplace in order to meet specific objectives. The objectives determine the type of communication needed and the means of reaching customer groups". Advertising tourist products and services are basically the same as for selling any other type of product except for some special feature that are unique to the industry. One of those feature is the intangible nature of the tourism product since the advertiser is basically selling an experience.

In order to communicate and attract actual and prospective customers many forms of advertising can be used, such as newspapers, direct mail, television, magazine, radio, outdoor advertising, directories, and display material (e.g. posters, cardboard, stand, window display and so on). The basic advertising message can communicate something in general about the tourist attraction/destination, or specific events. Differentiation one's product or service from competition is particularly important when the potential tourist is not familiar with the destination (Cohen, 1989b). Moreover, the choices between launching and support advertising therefore depends not only on the product but also on the target.

It is important that for the effectiveness of advertising, advertising efforts and activities should be directed to the early stages of the consumer`s decision-making process. This will gain the attention of the prospective visitor, holds the attention hence the message can be communicated, and makes a long time positive impression on the potential consumer mind. Furthermore, as advertising is undoubtedly the most expensive activities in order to attain firm's objectives, choosing right media, time and the prevailing use of colour are vital for effective advertising.

The Purpose of Advertising in Tourism Sector

The ultimate purpose of advertising is to influence buyer behaviour and manipulate demand for holidays. In other words, the primary aim of advertising is to create awareness of a destination and its attractions and to influence the travel planning process at an early stage by motivating potential tourists to decide to make supplementary enquiries about costs, bookings etc. As advertising allows great flexibility in the form, size and frequency of the message and can reach large number of people at one time, therefore, it is a widely used technique in promotion of countries.

Classification of Advertising in the Tourist Industry

It has been observed that with most products the consumer is able to see and check the item before purchase. Conversely, this is not the case with the tourism products and services for the most part, although travel and promotion videos and films can have a role in giving potential customers a preview. However, for most tourism products, the challenge is using promotion as a means of communication. This communication problem is combined by the fact that in most cases the vacation or travel decision has to be made by the customer before the journey actually begins. There are two important styles of advertisement which may be used to influence consumers:

1. Informative advertising: This type of advertising gives consumers with detailed information about alternative choices so that they can select the price range, quality and type of experience from those on offer which most attracts to them. It may be said that informative advertising improves consumers` knowledge of a certain category of services, it also contributes to the effective operation of competitive markets by increasing competition and improving the allocation of resources throughout society (Laws, 1991).

2. *Persuasive advertising:* The aims of this advertising is to inform, convince, and change the behaviour of potential tourists-that is, to encourage those actual and potential customers to take a holiday that they have not taken before or to change from taking one type of holiday to another type (Coltman, 1989). In brief, persuasive advertising attempts to influence consumers' tastes towards some preference of the advertiser. In this respect, there are argument against persuasive advertising is that "it acts by developing an image of a product or producer rather than by building substantive knowledge as a base for decisions at the consumer level and therefore it may be considered wasteful or inaccurate" (Laws, 1991:67).

PERSONAL SELLING

Personal selling is a two-way form of communication. In contrast to advertising, which is the impersonal component in the promotional mix, personal selling comprise individual and personal communication. Personal selling allows an interactive relationship *to be developed between customer and supplier in which the* latter can modify the information presented in response to the needs of the buyer. Besides personal selling allows a friendship between buyer and seller, which may be an important element of a relationship marketing strategy (Palmer, 1994).

Personal selling in tourism usually takes place at the travel agents or any sales office which a tour operator may have. Apparently, personal selling has the advantage of immediate feedback from the customer. Tour agents should determine the customer's needs and wants for instance, do they seek relaxation in their holiday, what price range is acceptable for them, do they have special needs? The travel agent can then propose suitable destination for their customer. On the other hand, one can argue that since there are too many customers to be involved, personal selling in the tourism industry is not practical.

PUBLIC RELATIONS

Public relation has been defined as "the activities connected with interpreting and improving the relationships of an organisation or an individual with the public" (Kaul, 1985:612). Public relation is a non-personal promotional device whose role is to establish and enhance a positive image of an organisation and its services among its various publics. In other words, public relations is not directed at the individual prospective tourist but rather at the distribution and the sales intermediaries such as travel agents, or journalists or editors on whose co-operation and support are needed towards creating and maintaining favourable images of the destination. In tourism, it is necessary to have full information available to actual and prospective tourist places a special task on the public relations function in official tourist organisations. Public relations activities in tourism range from familiarisation tours for travel writers, editors, travel agents; to receptions and presentation arranged by the offices of the official tourist organisations abroad; press releases to newspapers; and national weeks or contests organised by the destination country. It is also interesting to note that for a tourist destination, publicity may also be obtained through media fiction. An example of this would be movies. By having a movie with a pleasant setting take place in the tourism marketer's region, positive publicity can be obtained for that region.

Furthermore, public relations in tourism industry can be used to educate the customers and travel trade on the products and services available, especially new ones, and to improve their knowledge of other countries, people, cultures, resorts and destinations. Public relations activities are an essential part of a firm's promotion mix and should be included in their integrated plans (Foster, 1985).

The purpose of public relations is to build a strong positive image of an organisation for the public. Schmoll (1977) classified three principal characteristics of public relations: First of all, the purpose of public relations is communication to actual and potential customers in methods other than normally paid advertisement channels or direct sales effort. Secondly, it recreates a public awareness so as to enhance advertising and sales, and thirdly, public relations is used to build and maintain a positive image for a country, a tourist destination, or an organisation and its services in the minds of those who make public opinion such as journalists, travel writers and those who act as intermediaries such as travel agents and tour operators.

Although public relations has a significant role in the promotion mix, it has limitations as well. In fact, it would be fair to say that public relations is rarely sufficient in itself. Its major drawback is lack of control, as is not paid for it in most cases. In addition, it often omits details which the would-be customer needs to know, such as price, location, parking facilities, etc. (Ornstien and Nunn, 1980).

SALES PROMOTION

It is already noted that tourism products are perishable compare to other products. This means that marketing managers are constantly need to manipulate demand in response to unexpected events as well as the normal daily, weekly, or seasonal fluctuations. Sales promotion involves those activities, other than advertising, personal selling and public relations, that stimulate buyer purchase and the effectiveness of intermediaries. Sales promotion may be used to create awareness, but it is generally used for the later stages of the buying process, which is, to create interest, desire and bring action to buy.

Sales promotion activities can be directed at not only the consumers, but also the distribution networks. In destination promotion, these activities might be in the form of price cuts or sale offers, discount vouchers, competitions, prize draws, etc. A further example of destination in terms of sales promotion is special merchandise. T-shirt, key chains might generate word-of-mouth about the tourist destination.

While advertising and public relations have a primarily strategic role in developing and sustaining awareness, positive attitudes, images and product positions, sales promotion is basically tactical in its short run responses attracting customers' attentions at points of sale at particular times (Guven, 1991). It is important to bear in mind that short term demand adjustments are vital aspect of marketing for most travel and tourism producers.

OTHER PROMOTIONAL ACTIVITIES

In addition to the above promotion or communication mix, there are other promotional activities. As tourism is an intangible product, printed communication for instance brochures or sales leaflets are very important in promotion of tourism products and services. To a large extent, it is true that designing, printing and distribution cost of tourism brochures contain the largest part of most marketing budgets within the tourism industry. Nevertheless, this is an essential expenditure as the brochure or leaflet is the principal sales tool for tour operators and other tourist organisations.

Particularities of Promotions Mix

From the above analysis, it can be understood that each of the promotional elements in tourism is directed both to actual and potential customers and to intermediaries which in turn promote sales. The different kinds of promotion have their strengths and weaknesses.

Although personal selling has high efficacy for achieving communication objectives, only a comparatively small number of people can be contacted. Consequently, advertising is a better method of reaching a high number of people at low cost. However, one of the major disadvantage of advertising, particularly television commercials, is that it is ephemeral (Prentice, 1989). Moreover, public relations is more trustworthy than advertising, yet there is more control over advertising messages and they can be repeated on a regular basis. In addition, when it is difficult to raise advertising budgets, public relations is a lower-cost alternative, but it is difficult to control the timing and consistency of public relations coverage. Sales promotion, for instance price discounts, may produce an initial trial for a product, however, this type of promotion can only be used as a short-term period.

PROMOTION OF TOURIST DESTINATIONS

It is obvious that, promotion and marketing of countries as tourist destinations are different from other products. It is in this sense in tourism, tourism associations and official tourism organisations, operating at the national, regional or local level, complement and sometimes replace the marketing functions which in other industries would be exclusively done by individual enterprises. This involvement is particularly important in the field of international tourism promotion. It is not surprising that official organisations have crucial responsibilities in tourism promotion. Indeed, the involvement of official organisations in marketing and promotion is far more important, in the tourist industry that elsewhere.

Nowadays, competition in the tourism industry is increasing, the need for countries to promote and market their countries successfully is inevitable. By doing so, the essential point is to understand the needs and desires of the potential and actual consumers, and to offer the country's tourist product in a more attractive way than its competitors.

As explained in Chapter three most of the tourist product purchase decisions require high involvement, that is consumers search for a great deal of information before making a decision, promotion becomes particularly important. It may be said that there are two ways which a national tourist organisation should use in promoting its products. The first one is undifferentiated marketing by means of which the overseas promotion strategy is aimed at building a general image for the tourist destination. Communications mix, i.e. advertising, public relations, personal selling and sales promotion can be used for that purpose. The second method is differentiated marketing where promotional activities are directed at the different target segments based on the product types. In this method, it is likely to supply a product or service which can meet the consumers' needs as well as emphasise a promotional difference between other competitor countries.

Strategies For A Promotional Program

Having good tourism products or/and services, pricing them attractively, and making them readily available to tourists is not enough. Consumer should also be informed and motivated to take an interest in the tourism offering. Tourism, just like any other product, needs the right marketing mix to sell. In the tourism marketing mix, promotional program has significant importance for a successful and continuous business. Mill and Morrison (1992) explain the following process:

1. Selecting the target audience: At this stage selected market need to be analysed by the primary and secondary data. Any target market selected should be accessible by means of one or more promotional mix elements or through a specific type of media. Accessing a target market in this way means that it has to obtain certain essential information of their demographic, economic situation, their place of residence and so on. The target audience should be included people with similar characteristics who, through marketing research and/or past experience, have been shown to be the best prospects for purchasing what is being promoted.

2. Developing promotional objectives: Promotional objectives should be defined in terms that they are meaningful in the context of promotion. Since the function of promotion in the marketing mix is communication, objectives should show what is to be communicated to whom and how. In addition, when setting promotional objectives, it is important to consider the targeted customer's buying process stage, as well as the destination or service's product life cycle stage.

3. Establishing the promotional budget: In the tourism sector, it is very difficult to determine promotional budget, since there is no widely accepted or scientific methods by which an optimum budget can be defined. But, there are some general guidelines for it. Promotional budget should be decided in accordance with previously set objectives while taking into consideration the ability of the destination or organisation to support that kind of effort financially. Moreover, attention rightly should be focused on the amount being spent by competitors.

4. Deciding on message content: This stage is concerned with what message should be transmitted to the target consumer so as to create a desire to purchase. For a successful promotion, the most effective message concept(s) must be chosen.

5. Choosing message form: Once the promotional message(s) have been determined, the next step is to define how to say them. At this stage the objective is to develop message(s) that are understandable, distinctive, and believable.

6. Selecting promotional mix elements: There are many promotional devices to pass on the message to the targeted audience. The principal parts of the promotional mix are: advertising, personal selling, public relation and sales promotion which explained in previous sections.

7. Selecting promotional media: At this stage, there is a need to find out a suitable media to transmit the message(s) across to the selected market. The media used in the tourism industry are television, radio, magazines, newspapers, and so on.

8. Monitoring and evaluation system: It is generally recognised that control is a fundamental part of the promotional campaign. Controlling in the broad meaning is finding out whether a promotion campaign has been fulfilled in accordance with the plan. For a successful promotional campaign, activities undertaken should be controlled and its effectiveness tested at each stage of the campaign, but this is very difficult and challenging task.

The Role of the National Tourist Organisation in Promotion

A National Tourist Organisation is the official body of a country which is responsible for the development and marketing of tourism. It can be wholly governmental and part of the civil service, in the form of a Ministry of Tourism as the case of Turkey, or it can be a section of some other ministry. It could be a semi-governmental or statutory body and outside the civil service as in the case of a broad commission or authority (Mill and Morrison, 1992).

The National Tourist Organisations, generally known as NTOs, are responsible for tourism matters at the national level, and with their offices abroad at the international level. It is important to note that they are not producers; they generally do not sell products directly to the visitors; however they play a very significant role in the promotion of the country as being the official body to plan the national tourist policy, co-ordinate the activities within the tourism sector, control the different aspects of tourism services, and implement tourism information and promotion programmes.

It must be pointed out that not all of the activities of a NTO can be carried out from the home base. Hence, there is the need for a national tourist office abroad as an extension of the NTO in a specific market. It is the responsibility of a NTO office abroad to organise, direct, execute and monitor a comprehensive marketing campaign on behalf of its country within the market in which it is located. In achieving this role, it directs efforts towards maximising the marketing opportunities available to its country by initiating and co-ordinating promotional activities, and co-operating with the travel trade and other major tourism principals.

It would be fair to say that the overall aims of an NTO's campaign is to communicate with, inform and persuade both the travel trade and the potential consumers. It is in this sense that a national tourist office's public relations work is fundamentally media relations and a NTO is therefore dependent on the press and other communications media. It is through them that most of the information on the country is directed to the trade and the public at large, and in this way a great deal of the publicity about the country as a tourist destination is obtained. Consequently, one of the main task of a NTO is to set up an effective channel of communication with the mass media.

Most official tourist organisations encounter difficulties whenever they come to get approval from the government for the budgets they rightly feel are needed to continue their efforts in the promotional field from year to year. However, public funds are always limited and the competing claims of other government departments are often more urgent.

It is widely agreed that tourist promotion is necessary, but considerable argument tends to arise over such questions as how much to spend, what to achieve and where to achieve it. These arguments do not always lead to clarification and agreement, mainly because so far there does not yet exist a reliable and generally applicable method to prove a direct relationship between tourist promotion spending and tourist revenue.

Since in the tourist industry, the end product, the satisfaction of the people's desire to travel and to see new places, depends not on the efficiency of one producer but rather on the performance of numerous companies of different kinds, with not always identical objectives, operating in different places. Therefore, any promotional effort no matter how well planned and executed might fail if one or more of these involved in producing tourist satisfaction fall down on their parts of the job. Moreover, it is practically impossible to measure exactly the contribution of each individual member of the industry to overall result as expressed in national tourist revenue.

Promotional Activities Carried Out by National Tourist Organisation

As noted earlier that not all promotional activities of a national tourist organisation can be carried out from the home base. Therefore, there is a need for national tourist office abroad as an extension of the NTO in a specific market. In fact, these offices have a competitive advantage over those which try to run their promotional campaign from the home base. Promotional activities of a national tourist organisation can be distinguished into a trade-oriented and consumer oriented one.

The Trade-Oriented Promotional Activities

Educational or Familiarisation Tours: In order to inform the travel trade about and familiarise it with the tourist product(s) of its country, a national tourist office will organise educational tours for selected tour operators and travel agents, who can then sell the country as a tourist destination more easily. During these tours, the foreign tour operators and travel agents inspect the country's tourist facilities, visit its tourist attractions and, usually have contacts with the local travel trade.

Tourist Workshops: The aim of this promotional activity is to bring together all the main components of the tourist industry of both generating and receiving countries. The main objectives of such workshops are, firstly, to promote the tourist product mix of the receiving country to the travel and trade and other principals of the generating country and, secondly, to provide a suitable opportunity for the travel principals of the receiving and generating countries to establish working relationships.

Sales Seminars: As educational tours and tourist workshops, sales seminars are organised by the national tourist office in order to familiarise the travel trade with the tourist product and the latest development in the tourist industry of its country, and to motivate it to increase sales of tours and to encourage travel there.

Direct Mailings: With the purpose of keeping the travel trade well stocked with promotional material on the country, the national tourist office carries out regular direct mailing of tourist literature. The travel trade is, therefore, itself in a better position to service more adequately enquiries from its clients and actually promotes and sells the country.

Newsletter: As part of the regular supply of information within the framework of its promotional efforts, the national tourist office normally establishes a permanent channel of communication with the travel trade through the regular issue and distribution of a newsletter. Through such a newsletter the national tourist office informs the travel trade about all relevant developments concerning the tourist product and the tourist industry of its country. At the same time, it also attempts to promote sales of its product.

Consumer-Oriented Promotional Activities

Some of the most important consumer-oriented promotional activities in which the national tourist office is normally engaged, can be summarised as follows:

Enquiries from the Public: These enquiries can be either in writing, by telephone, or made by in person. Tourist literature and other promotional material is used for servicing of enquires from the public but not all enquiries arise from potential or prospective holidaymakers. A small proportion of enquires received by a national tourist office originates from returning tourists and concerns the widest possible range of subjects, including complaints and praise or likes and dislikes.

Participation in Tourism Fairs and Exhibitions: This is done with suitably decorated stand, which present the tourist attractions of the country. Here, the tourist office aims at contacting large numbers of potential tourists in order to inform them about the tourist attractions of its country and persuade them to travel there. In doing so, the tourist office distributes large quantities of tourist literature to interested people.

Window Display Campaigns: These specially designed display units are exhibited in travel agencies and other retail outlets. Their aim is to give promotional exposure tc the product, conveniently enough, at its point of sale.

Tourism Promotion in Developing Countries

It is generally recognised that tourism promotion is a very costly activity and that it is not practicable for an individual poor, developing country to contact all tourist-generating markets. Many developing countries have a small proportion of the international tourist market and this proportion cannot sustain by the huge promotional expenditures to take a larger share of the market.

It has been observed that the Third World tourist destinations are considered as being long haul, therefore, the cost of a holiday is relatively high. The potential and actual tourist will find it more attractive if a multi-destination package results from their high expenditure and long travel time. Hence, tour operators can satisfy their customers and maximise their profits by organising packages for multi-destination holidays. The tendency towards this type of tourism offers countries within a region the possibility of promoting a regional image. On the other hand, countries within the region at a more advanced level of tourist development might oppose this concept since they would prefer the tourists to stay in their own country so that they can obtain maximum benefit.

A good example in this respect have been gained by Nepal, the Maldives and Sri Lanka through their joint tourism promotion since their tourist products - mountain, beach and culture, respectively- exhibit complementary characteristics for an attractive package tour (Wing, 1989).

OTHER MARKETING MIX IN TOURISM SECTOR

In addition to the four traditional elements of the marketing mix which examined above, some authors add the additional elements such as people, process, physical evidence.

People: For tourism sector, people are a critical element of the marketing mix since most employees have contact with customers. It is true that how a car is made of relatively small interest to the person who buys it. In other words, consumer are not affected whether a production worker dresses untidily, used bad language at work. On the other hand those are important in tourism sector. In this context, in service industries, everybody is what Gummesson (1991) call a 'part-time marketer' in that their actions have a much more direct effect on the output received by customers.

As in the tourism sector most staff have a high level of contact with customer, it is necessary that service organisations clearly specify what is expected from personnel in their communication with customer. To achieve the specified standard firms need to educate their staff. It is important to note that this decision should not be regarded as personnel decisions but rather marketing mix decisions.

Physical Evidence: As previously noted that tourism product and service are intangible, this means that potential customers are unable to try a service before it is consumed, this of course increase the risk of a purchase decision. An important element of marketing mix strategy is therefore, to decrease this level of risk by offering tangible evidence of the nature of the service. This evidence may obtain a number of form. In the simplest sense, a brochure may outline and contain photographs of important elements of the service product. For example, a holiday brochure presents pictorial evidence of hotels and resorts for this aim.

Process: Admittedly, the process of production is generally of little concern to the consumer of manufactured goods, it is frequently important to the consumer of tourism services who can be seen as a co-producer of the service. Customers of a restaurant are profoundly affected by the manner in which staff serve them and the amount of waiting involved during the production process (Palmer, 1994).

Those marketing mix elements are essential to the definitions and promotion of the service in the customer's eyes, both prior to and during the service experience. Above mentioned marketing mix elements should be utilised in order to influence consumer's buying decision.

Conclusion

Promotion or so-called marketing communication refers to all the means usable for reaching the target audience. These audiences cover not only past and potential customers, but also opinion-formers such as journalists and travel writers, retail influences such as travel agents (Seaton, 1989). It was previously argued that the tourism sector is different from other sectors. In the tourist sector the end product, the satisfaction of people's desire to travel and to see new places, depends not on the efficiency of one producer but rather on the performance of numerous companies of different kinds, with not always similar objectives, operating in different places and at different times.

To be successful in marketing a country both public and private sectors ought to work together. Foremost, the right promotion mix must be developed where each of these promotional techniques is used as needed. In fact, the tourism marketer has highest control over advertising and sales promotion. Both advertising and sales promotion are created, implemented, and paid for by the marketer. Conversely, personal selling is generally done indirectly through travel agents; public relations is produced through the media. It is therefore meaningful for the tourism marketer to sustain good relations with both the travel trade and with media.

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Chapter Five

Research Methodology

INTRODUCTION

This chapter provides a discussion of the research methodology, design and procedures used to examine British tour operators' familiarity with Turkey as a tourist destination; and search what image and expectations British tourists have about Turkey and to find out the degree of their satisfaction with the country.

Further this chapter includes research hypotheses, data sources and the specific data analysis methods used in the current study to test the hypotheses. Thus the objective of this chapter is explaining the methodology rather than the analysis of the findings, which will be looked at in the next two chapters.

CLASSIFICATION OF THE SAMPLE

It is safely claimed that the success of many destinations depends to a large extent on tour operators, who are interpreters and co-ordinators of demand, particularly, in the case of developing countries, which are inevitably dependent on foreign tour operators (Jenkins, 1980). It was thought that by researching the degree of familiarity with Turkey as a tourist destination possessed by British tour operators and their marketing activities undertaken to market Turkey in the British tourist markets, it would be possible to get a better idea about the current status of marketing in these tourism sectors.

Consumers are very important in marketing in the tourism sector. In fact, marketing activities start and end with their satisfaction, therefore, by investigating British tourist's attitudes, image and satisfaction with Turkey as a tourist destination country, it would be possible to have a better idea about the state of marketing in the various tourism sectors.

British tourists and tour operators are chosen for this study, because of the importance of this market to the country, and also in terms of future growth potential. Moreover it was thought that the familiarity of the author with Turkey would be helpful during the research.

RESEARCH METHODS

To achieve the objectives of the study and to test viability of hypotheses, both theoretical discussions and empirical study (i.e. two questionnaires were designed, one for the UK tour operator and the other for a tourist survey), were employed during this research.

THEORETICAL DISCUSSIONS

This study requires an extensive search of secondary data. These data are valuable in trying to analyse Turkey's tourist attractions, market share, economic importance of tourism in Turkey, marketing concepts, image and attitudes of tourists, travel choice and tourism marketing mix and so on. Previous literature on the above subjects, relevant textbooks, journals, unpublished theses, publications of the Turkish Ministry of Tourism have been consulted.

EMPIRICAL STUDY

The empirical study was an attempt to find out the British tour operators' level of familiarity with Turkey as a tourist destination, and their attitudes towards the tourist attractions of the country, and related aspects will be discussed. Two questionnaires were used in the field work.

Questionnaires Design

The main objective of tour operator survey was to examine British tour operators' familiarity with Turkey as a tourist country in general, and their attitudes towards the attractions of the country. This included the prices of the tourist services, relations with the Turkish Tourism bodies and their promotional activities in particular, from which we can evaluate the relationships between the Turkish Tourism bodies and the UK tour operators. The survey also aimed to discover the areas of weaknesses or strengths in Turkey's tourist product. The survey was conducted using a postal questionnaire.

There are certain situations where the postal method is the only effective survey technique to use. Sometimes the population to be covered can be so widely and thinly spread, and the funds available so limited - as in this current research- that the postal questionnaire is the only feasible approach. Moreover, postal surveys also allow respondents time to reflect on the questions (and possibly to look up records) so that they can give more considered or more precise answers (Brook, 1978). Indeed, in this survey the nature of the questions was such that my respondents had to refer to company records.

In order to obtain the highest possible response rate and to minimise difficulties in answering the question, the questionnaires were pre-tested (i.e. pilot study) among ten travel agencies in Glasgow. The questionnaire was completed by the managing directors, in the presence of the researcher himself. It is important to bear in mind that such study has a number of functions. Veal (1992:118-119) explains this functions as follows:

1) to try out the wording of questions in a questionnaire, to ensure that it is understood by respondents;
2) to test the sequencing of questions in the questionnaire;
3) to gain some familiarity with respondents and their views, etc. which may lead to some modification of questionnaire content;
4) to obtain an estimate of the time taken to complete a questionnaire.

In order to analyse what image and expectation British tourists have about Turkey and to find out the degree of satisfaction with Turkey as a tourist destination, a tourist consumer questionnaire was conducted. As in the tour operator survey, a pilot study was conducted for the tourist consumer survey. Several confusing questions were discovered and corrected; wording was improved and some new questions and items were added to the questionnaire. In the words of Moser and Kalton (1971) this pilot study results in important improvements to the questionnaire and increased in the efficiency of the enquiry.

The pilot test carried out among 25 people -lecturers, undergraduate and postgraduate students at The Scottish Hotel School, in Glasgow and local people; they were all British.

Both questionnaires (tour operators' and tourist consumers') used in this current study are shown in Appendices 3 and 5. The way questionnaires were structured and the way the questions were formulated were in accordance with the expectation of maximising the amount of information that can be collected for the purpose of testing the hypotheses and, at the same time, minimising the difficulties that participants might have in understanding and answering the questions.

In connection with the type of questions used there are generally three alternatives; one, open-ended questions; second, closed (i.e. fixed) questions; and third is a combination of closed and open-ended questions (Pizam, 1994). It is natural that each of these types of questions has its own advantage and disadvantage.

The advantage of the open-ended question is that the participants' answer is not influenced unduly by the questionnaire and the verbatim replies from respondents can provide a rich source of varied material.

On the other hand, open-ended questions have two principal limitations. Firstly, analysis of verbatim answers for computer analysis is laborious and difficult. Secondly, in the case of self-completed questionnaires, response rates to open-ended questions can be very low since people are often too lazy or busy to write down the answers.

However, a closed type of question needs exploration before their construction, so as to take into account all possible answers. Without such exploration, they may be difficult to formulate. Nevertheless, these questions are easy to answer, interpret and encourage respondents by giving the impression of time-saving.

In this current study both types of questions were utilised. It is important to bear in mind that when to use open-ended or closed question is a matter of judgement.

In both the tour operator and tourist consumer surveys the Likert scaling model was used. A Likert scale model requires that the respondent connote the degree to which he or she agrees or disagrees with each statement, rather than simple agreement or disagreement. The degree of agreement is often demonstrated on a five-point scale, although three and seven have sometimes been used (Smith, 1989).

Moreover, the Likert models' primary concern is to make sure that all the items measure the same thing. It also wanted to eliminate the need for judges by getting subjects in a trial sample to place themselves on an attitude continuum for each statement - running from "strongly agreed to agree, uncertain, disagree and strongly disagree" (Oppenheim, 1966). As a concluding note, it would be fair to say that the Likert scales are simpler to construct and are perhaps the most frequently used scale in tourism research.

QUESTIONNAIRES DEVELOPMENT

Tour Operators' Survey

In order to test hypothesis one, the tour operator questionnaire was formulated. There were 25 questions. The first part of the questionnaire deals with the degree of familiarity of tour operators with Turkey as a tourist destination and how to measure this familiarity.

Question one, looks at the knowledge that tour operators have about Turkey as a tourist destination. The answer of this question was tested by questions, two to five. The aim of question two to is analyse for how many years British tour operators were selling Turkey as a tourist destination; whereas question three deals with the number of visits to Turkey made by anyone from the tour operator company in order to increase their knowledge about Turkey. Question four, set out to discover the British tour operators' views on the degree of relative importance of Turkey among the other tourist destination. Question five establish the proportion of British tour operators' total business that depends on Turkey.

The second part of the questionnaire looks at tour operators' views on product and price aspects of the country.

Question six concentrated on the reasons why British tourists visited Turkey. Question seven (A) and (B) were designed to search British tour operators' opinions whether or not the tourist attractions and facilities in Turkey were adequately developed in order to meet the needs of the British tourists. Consequently, if those attractions and facilities are not sufficiently developed, what progress needs to be made? Question eight tested the tour operators' views on the selective prices of Turkish tourist services.

The third part of the questionnaire aims at attempting to assess the tour operators' views on the promotion of the country.

While question nine (A) examines relations between the tour operators, and Turkish Ministry of Tourism and the other tourism organisation in Turkey, question nine (B) wanted to find out ways to improve those relations, or if any, were poor or weak. Question ten intended to find out whether or not British tour operators were receiving any funds for promoting Turkey. Question eleven asked the participants of this survey, how they had been contacted by the Turkish tourism bodies.

The purpose of the fourth part of the questionnaire was to gather detailed information on British tour operators, hence questions twelve to twenty-four were prepared and the final question concentrated upon the tour operators' comments and suggestions on how to improve the tourism industry in Turkey.

Tourist Consumer Survey

This questionnaire was designed to test hypotheses two to five. Its aim was to research what image and expectations British tourists have about Turkey and to find out the degree of satisfaction with Turkey as a tourist destination. This questionnaire was composed of four sections. The first section aimed to test hypotheses two and three. It consists of questions regarding aspects: whether or not respondents' were first time or repeat visitors to Turkey in the last five years; the purpose of visit, how and when the booking arrangements were made; the reasons and expectations that may be considered of importance to British tourists for their visit to Turkey. These are grouped into different attributes of tourism some of which were identified by Goodrich (1978). In addition, the airline on which visitors had travelled and the reasons why they chose that particular airline. Furthermore, question seven aimed to identify the sources of information which influenced tourists to visit Turkey. The response of this question is very important since it can be assess the extent to which Turkish tourism organisations could influence potential British tourists to visit Turkey by their promotional activities. Question ten and eleven were designed, to identifying which parts of Turkey British tourists stay in, and question twelve researched British tourists' opinions on local transportation used while in Turkey. The final question on this section was intended to judge the helpfulness of some of the sources of information available to British tourists, while visiting tourist attractions in Turkey.

The second section of the questionnaire was specially designed to test hypothesis four. To measure British tourists' perceived satisfaction or dissatisfaction with their holiday in Turkey. Tourists' satisfaction or dissatisfaction can be examined in different aspects, such as accommodation, local services, attraction, price and promotion. In this section, there are other questions establishing the five most important reasons that encourage/discourage British tourists from visiting Turkey again, and whether or not respondents would recommend Turkey to their friends and/or relatives.

The third section of the questionnaire is concerned with British tourists' socio-economic characteristics. The set of questions was designed to identify their marital, sex, age, occupation, education and income status.

In an attempt to test hypothesis five, the fourth section of the questionnaire aimed to assess overall satisfaction or dissatisfaction with Turkey as a destinations. Finally an open-ended question was devoted to obtain comments and suggestions from British tourists.

RESEARCH HYPOTHESES

Based upon the research objectives that are presented in Chapter one, the following research hypotheses have been developed:

Hypothesis 1:

The degrees of familiarity with Turkey as an international tourist destination country possessed by the UK tour operators and their attitudes towards Turkey are influenced by the marketing activities of the Turkish tourism organisations.

Hypothesis 2:

The attitudes of British tourists towards Turkey as a tourist destination is influenced by the marketing activities of the Turkish tourism bodies, and UK tour operators offering the country as a tourist destination.

Hypothesis 3:

The travel motivations of the British tourist are probably attributable to Turkey's good weather and being a "sun, sea and sand" holiday destination.

Hypothesis 4:

The degree of satisfaction experienced by British tourists with Turkey is influenced by the activities of the Turkish tourism bodies and the tour operators which are offering the country as a tourist destination.

Hypothesis 5:

As an overall statement, the British tourists are satisfied with Turkey's tourism facilities and attractions.

RESEARCH PROCEDURES

In the case of the tour operator survey, the first stage was to identify the UK tour operators who are featuring Turkey. Accordingly, a letter was sent to the Turkish Information Office in London, asking for a list of UK tour operators who were selling Turkey as a tourist destination in 1995 season.

A brochure was obtained from the Turkish Information Office in London in relation to UK tour operators. These tour operators can be grouped as follows: Sixty-one of them are featuring summer holidays, ten of them winter holiday, twenty-one of them short breaks, twenty-five of them sailing and cruising and thirty-one of them were special interest tour operators.

114 tour operators (See Appendix 1) - all British tour operator who are selling Turkey as an international tourist destination - were chosen for this survey. Although the geographic dispersions of tour operators differed, major tour operators were based in London. The structured questionnaires were then sent to one hundred and fourteen tour operators during the first week of May 1995, with a cover letter (See Appendix 2).

The covering letter explains the aim of the survey to recipients and provides assurances about confidentiality. Moreover, the cover letter for the questionnaire was on university letter-head, stressing the academic nature of the study and signed by Head of Department who supervised this research. It was thought that this may increase response rate (Lin, 1976). In addition, to increase response rate a pre-paid enveloped was enclosed with each questionnaire and promised of a copy of result if the participants wished to have one.

Hoinwill and Jowell (1978:135) argue that "to raise response levels in postal surveys a reminder letter to recipients who have not yet returned the questionnaire is essential". Therefore, a remainder letter (See Appendix 4) was sent to improve the response rate. Overall sixty-two completed questionnaires had been received from the tour operators. Of these returned questionnaires, eleven were incomplete and therefore were eliminated. The remaining fifty-one questionnaires were used, this represents a response rate of 44.7%. Discussions of the findings will be provided in the next Chapter.

It should be added that three tour operators indicated their interest in the results of the survey.

Regarding the tourist consumer survey, because of the scope of the study the most suitable data collection technique was to administer the questionnaire at the airports. In Turkey there are six international airports, namely, Ataturk (Istanbul), Esenboga (Ankara), Antalya, Dalaman, Bodrum and Adnan Menderes (Izmir) Airport. The most three important airports (Ataturk, Esenboga and Adnan Menderes) were selected respectively.

The population of this survey was defined as all British tourists who were taking a holiday in Turkey between June and August 1995. The participants have been chosen randomly. The questionnaire was distributed at the above airports to those British visitors who were returning to Britain and willing to participate, during the pre-flight time and collected before they boarded the aircraft.

It is important to note that, with the purpose of obtaining different distinctive views, and to avoid repetition and imitation among the participants' views, the questionnaire was distributed only to those heads of parties who were willing to participate in the study. By way of illustration, if a married couple, only the husband was requested to complete the questionnaire.

Four hundred people were chosen as the survey sample. Of these questionnaires sixty-one were incomplete and therefore were discarded. Consequently, three hundred and thirty-nine questionnaires used in this research, representing a response rate of 84.8 %.

The following formula was used in order to find out the sample size for this survey (Ryan, 1995:178):

Formula:

$$n = \frac{NPq}{\frac{(N-1)B2}{Z2} + Pq}$$

Where :

n= Sample size

N= Population size

P= Population Proportion or estimate

q= 1-P

B= Allowable error

Z= Z score based on desired confidence level

Average of British citizen visiting Turkey among 1984 and 1994 is 307,600 (See Table 5.1).

$$n = \frac{307{,}600(0.5)\,(0.5)}{\frac{(307{,}600-1)\,(0.049)2}{(1.96)2} + (0.5)\,(0.5)}$$

N=307,600
P=0.5
q=0.5
B=0.049
z=(1.96)2

$$n = \frac{76{,}900}{\frac{307{,}599(0.002401)}{3.8416} + 0.25}$$

$$n = \frac{76{,}900}{192.5} = 400$$

Table 5.1 Number of British Citizens Visiting Turkey (1984-1994)

Years	No. of Visitors
1984	89,709
1985	124,677
1986	154,231
1987	266,900
1988	465,142
1989	405,943
1990	351,458
1991	200,813
1992	314,608
1993	441,817
1994	568,266

Source: *Turkish Information Office in London.*

Apparently, the formulation requires some decision about what population proportion to use. If there is no a priori inclination, -as in the case of this research- then the value of P=0.5 is often used. Hurst (1994:456) describes sampling error (i.e. allowable error) as follows "... a mathematical concept that relates the size of error in estimates from samples to the size of those samples. These estimates of error are based on the assumption". It is important to note that the allowable error by convention is normally estimated among 3 to 5 per cent, but as Ryan (1995) believes that this should be carefully assessed in light of the nature of the derivation of the population proportion and other aspects of the initial data. In this research allowable error had been chosen 4.9%. Moreover, generally speaking market research will seek to work to a level of confidence of plus or minus 2.5 per cent. As it is known that 95 per cent of all cases fall within the range of the mean plus or minus 1.96 standard deviations, the z value is routinely 1.96 (Ryan, 1995).

It is reported that the development of sampling theory and the acceptance of sample survey results has made it possible for people or organisations who make decisions to have the ability to collect information relatively quickly and inexpensively and to use that information in their decision making (Cannon, 1994). Therefore, a common question is how large a sample is required. This is especially true of projects being undertaken with constrained funds, as in this research. The main aim of any sampling design is to provide guidelines for selecting a sample that is representative of its underlying population, thus providing a specified amount of information about the population at a minimum cost. If the underlying population is uniform in the characteristics to be measured, almost any sample provides acceptable results (Mendenhall and et al., 1989).

DATA ANALYSIS

In this research, Statistical Package for the Social Sciences (SPSS) computer programmes were used to analyse the data since SPSS is a comprehensive and flexible statistical analysis and data management system. Moreover, SPSS can generate tabulated reports, charts and complex statistical analyses (Norusis, 1993).

It is hoped that mean will provide a summary picture of the distribution of the various variables. Cross-tabulation analysis is used in order to show insight into the nature of the relationships between the various independent variables and dependent variable. In addition, the analysis will be supported with the outcome of the general views of respondents.

In the succeeding two chapters the findings of the tour operators and tourist consumer survey will be analysed.

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Chapter Six

Tour Operators' Survey

Data Analysis and Findings

INTRODUCTION

The objective of this chapter is to analyse the findings of the tour operator's survey in order to test the validity of the first hypothesis put forward in the previous chapter:

Hypothesis 1:

The degrees of familiarity with Turkey as an international tourist destination country possessed by the UK tour operators and their attitudes towards Turkey are influenced by the marketing activities of the Turkish tourism organisations.

This chapter aims to examine the following three major aspects. Firstly, the type and size of the British tour operating companies in order to determine their business nature. This would include an investigation of the type and size; annual sales turnover; number of branches; and number of employees of the tour operator companies offering holiday packages to Turkey. Secondly, the degree of familiarity with Turkey as a tourist destination held by the tour operators and their general attitudes towards Turkey. Thirdly, marketing policies (i.e. product, pricing, promotion policies) undertaken by the Turkish tourism organisations to familiarise the tour operators with Turkey as a tourist destination.

Additionally, major problems in selling holidays to Turkey, best features and complaints of holidays in Turkey reported by the tour operators' clients are also examined. Finally, the chapter ends with the tour operators' comments and suggestions in order to improve the tourism industry of Turkey.

The Type and Size of Tour Operating Companies Offering Turkey as a Tourist Destination

Factors used in assessing the type and size of tour operating companies cover type of operations, number of employees, annual sales turnover, whether or not have any other branches in UK. These factors will be discussed briefly.

Type of Tour Operating Companies

Tour operators were asked to specify the type of their companies. Details are given in Table 6.1 below. Reference to Table 6.1 shows that the majority (68.6 %) of the tour operators promoting Turkey as a tourist destination in the British market, are operating entirely tour operators.

TABLE 6.1 Type of Tour Operating Companies

Value Label	Frequency	Percent	Valid Percent	Cum Percent
Tour operation only	35	68.6	68.6	68.6
Primarily T.O. and some T.A.activities	6	11.8	11.8	80.4
Primarily T.A. and some T.O.activities	7	13.7	13.7	94.1
Yacht Charter Operation	3	5.9	5.9	100.0
Total	51	100.0	100.0	

Valid cases 51 Missing cases 0

In addition, six companies indicated that they operate primarily as tour operators with some travel agency activities, while seven firms out of fifty-one denoted that they operate primarily as travel agencies with some tour operation activities. Three tour operators were solely concerned with yacht operations.

Size related factors were also considered of importance and British tour operators were requested to give the size of their firms in terms of number of employees, annual sales turnover and whether or not any had other branches in the UK. In the following these answers are introduced.

Size of Tour Operating Companies

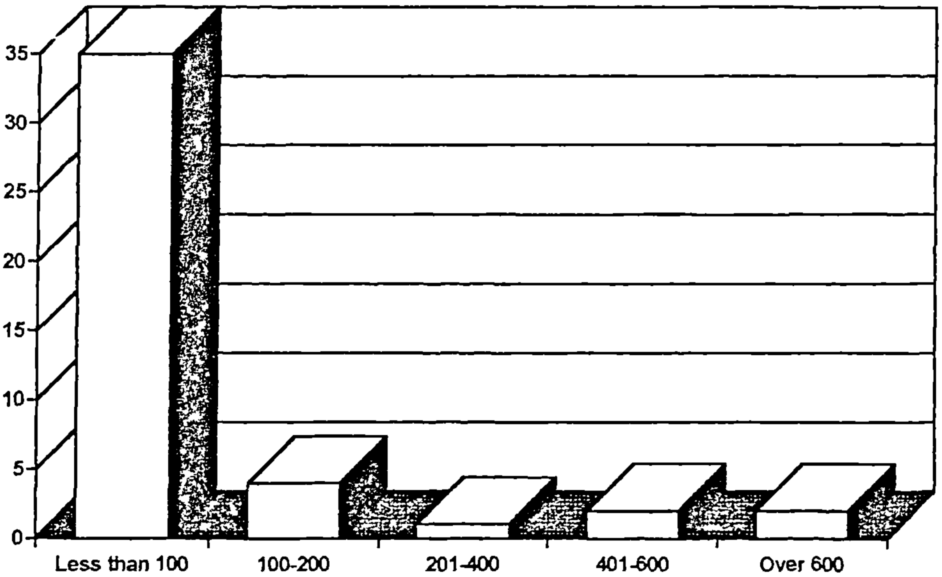
Number of Employees

As can be seen from the Table 6.2 the majority (35 of the sample which represent 79.5%) of tour operating companies have less than one hundred employees. Four companies that represent 9.1% of the sample, have a number of employees ranging from 100 to 200, whereas only one firm informed that they have employees between 201 and 400. Four firms have a very large number of employees ranging from 401 to 600 and over 600 respectively.

Annual Sales Turnover

Question twenty-four (B) solicits information on annual sales turnover of the tour operators, it was considered to be an important indicator of the scale of operations of these firms. Forty-one operators were not able to provide figures due to company's policy. Table 6.3 indicates that the majority of tour operators answered (60%) that their annual sales turnover was less than £ 10 million. However, there are few respondents (four out of ten) who have achieved annual sales turnovers ranging between £ 10 million to £ 20 million.

TABLE 6.2 TOUR OPERATORS' NUMBER OF EMPLOYEES



Number of total valid response = 44(100%)

TABLE 6.3 Annual Sales Turnover of the Tour Operating Companies

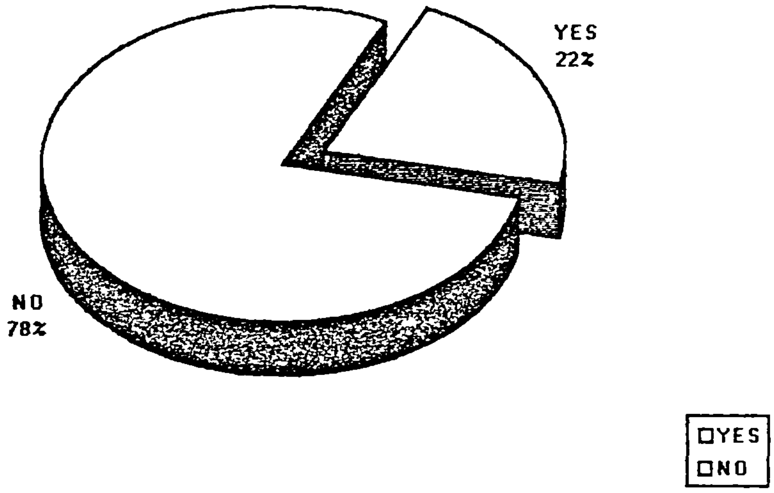
Value Label		Frequency	Percent	Valid Percent	Cum Percent
Less than 10 million		6	11.8	60.0	60.0
10- 20 million		4	7.8	40.0	100.0
Not applicable		41	80.4	Missing	
	Total	51	100.0	100.0	

Valid cases 10 Missing cases 41

Number of Branches

As can be inferred from Figure 6.1 that majority (78%) of tour operating companies under investigation, had no branches in the UK. Only eleven tour operators (22%) had branches in the UK. Table 6.4 provides some indications that over 54.5 per cent of the companies have less than five branches in the UK. As the findings reveal, four companies have over ten branches and are big tour operators.

FIGURE 6.1 TOUR OPERATORS' BRANCHES



Number of total valid response = 51(100%)

TABLE 6.4 Number of Branches of the Tour Operating Companies

Value Label		Frequency	Percent	Valid Percent	Cum Percent
Less than 5 branches		6	11.8	54.5	54.5
5-10 branches		1	2.0	9.1	63.6
Over 10 branches		4	7.8	36.4	100.0
Not applicable		40	78.4	Missing	
	Total	51	100.0	100.0	

Valid cases 11 Missing cases 40

Judging from the whole analysis of the type and size of tour operating companies surveyed it can be understood that Turkey deals with a variety of tour operating firms in the UK, the majority of whom operate primarily as tour operation, and have less than one hundred employees, have reached annual sales turnovers of less than £ 10 million, and most of them have no branches in the UK.

Relations with tour operators depend very much on the type of tourism being developed. Some tour operators are small specialised firms, serving a public which is more interested in foreign travel than a sedentary resort holiday. Other, large tour operators are concerned with mass tourism to places which have usually begun to establish a reputation as attractive tourist resorts. Each of these two types of tour operators has different links with the host country. The small operators dealing with travellers or those seeking out more exotic locations tend to establish links with local, and they do not engage in long term contracts with local hotels or with air charter companies.

On the other hand, large tour operators dealing in mass tourism are much more likely to pass over the local operators and tend to establish contracts with hotels in the receiving country - often of two to five years duration or on long term 15 to 25 years leases (Zammit, 1981). Moreover, large tour operators can play a crucial role in turning developing destinations into highly popular ones through their capacity to move large number of tourists into newly introduced destinations. Taking into account the current tourism development in Turkey, if the Ministry of Tourism wants to develop mass tourism, it should therefore have more close relation with large tour operators in UK and other major tourist generating countries to Turkey.

One important question to be derived from the whole discussion in this section is to what extent are these British tour operators particularly interested and familiar with Turkey as an international tourist destination? In the following pages this will be explored.

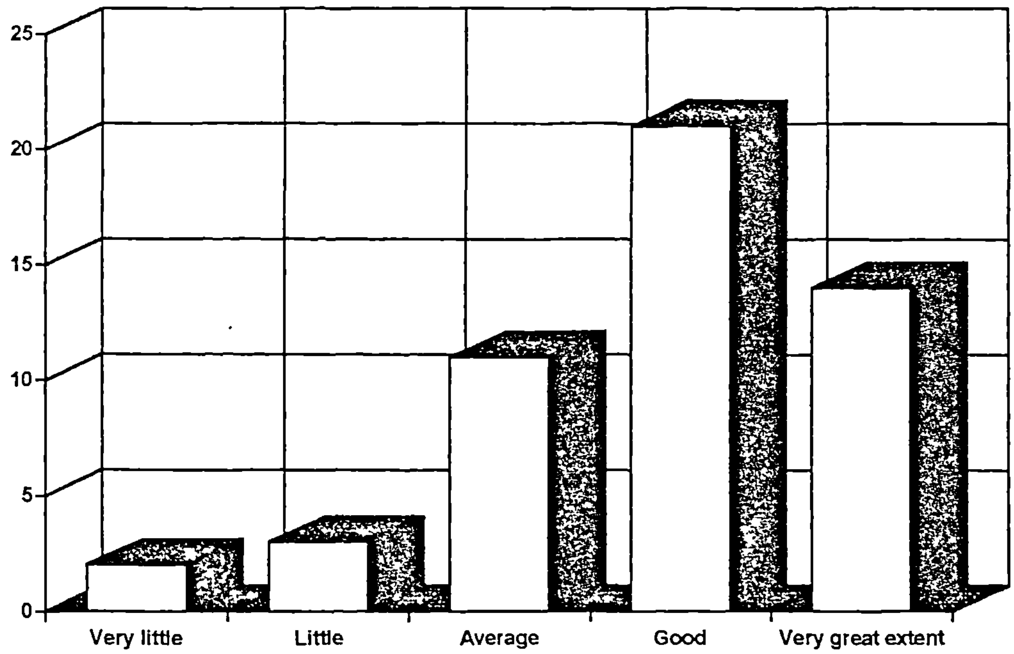
Tour Operators' Degree of Familiarity with Turkey and their General Attitudes

As argued in the theoretical part of this study, the distribution system should be efficient and positive. It is not sufficient to possess a distribution system; tourist receiving countries need to help, advice, support the travel trade in order to ensure that the tourist products are visible and accessible in the market place. Moreover, they should build the right image for the country.

Tour Operators' Familiarity with Turkey as a Tourist Destination

Respondents were asked to indicate the extent to which they were familiar with Turkey as a tourist destination, using a five-point scale ranging from 'very little' to 'very great extent'. The answers were presented in Figure 6.2.

FIGURE 6.2 Tour Operators' Current Knowledge of Turkey



Number of total valid response = 51(100%)

From the Figure 6.2 it can be noticed that tour operators in the survey have a high degree of familiarity with Turkey as a tourist destination. Almost 69 per cent of the tour operators were familiar to a good or very great extent, while only a small numbers of tour operator (5 out of 51, corresponding to 9.8%) were familiar to a lesser extent. Moreover, eleven tour operators reported that they have average knowledge with Turkey.

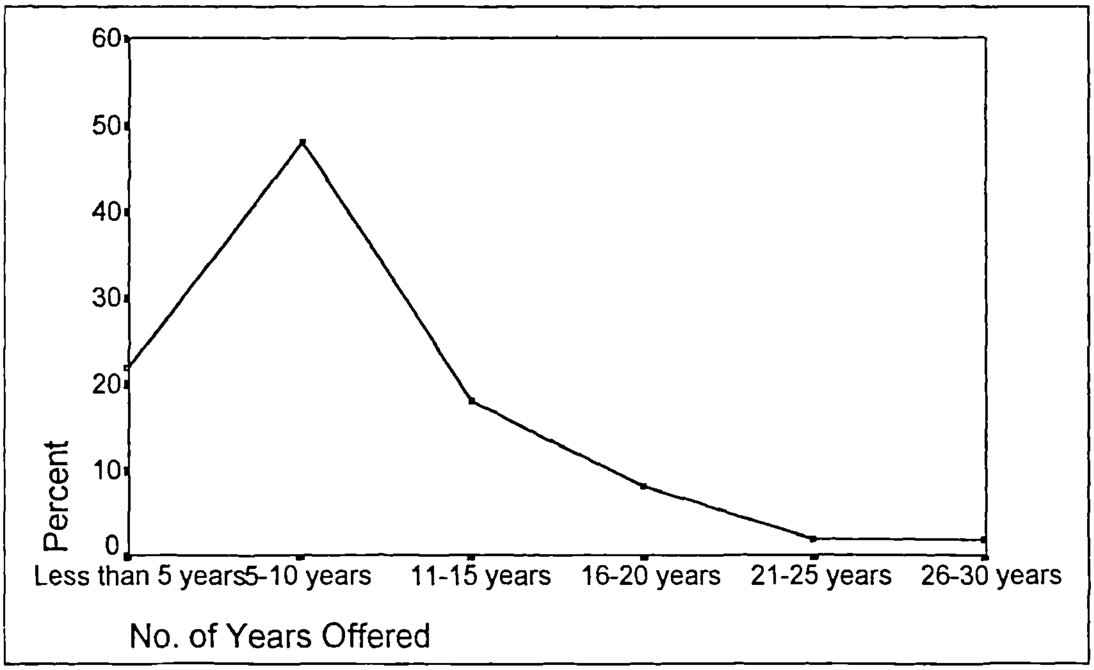
From the above discussion, it can be understood that most British tour operators are familiar with Turkey. However, tour operators' familiarity with tourism in Turkey ought to be measured from different perspectives, such as length of time Turkey has been promoted by the British tour operators, number of visits undertaken by them to Turkey, importance of Turkey to them, the proportion of their companies' total business generated by Turkey as a tourist destination. The next section will focus on these measures.

Length of Time Turkey Featured in Tour Operators' Programmes

Reference to Figure 6.3 provides some indications as to the length of time which Turkey has been featured by the British tour operators. 88.0 per cent of the companies included Turkey in their programmes for the last fifteen years. This coincides with the overall growth in international demand for Turkey. As mentioned earlier in Chapter two, from the beginning of the 1980s the growing capacity of the country's tourism facilities lead to the advent of a free market economy and a generous incentive scheme that attracted domestic and foreign investors to the sector. As a result of these measurements, Turkey had 5.4 million tourists annually, tourism revenues of US$ 3.2 billions, and an international market share of 1.2% in 1990 (Ministry of Tourism, 1993). Moreover, the increase in international arrivals accelerated between 1984 and 1994, by 206%. Similarly tourist receipts increased 1,170% between 1982-1994 (See Table 2.3).

Moreover, the findings reveal that four companies (8.0%) have offered the country for a duration of 16-20 years, while only two companies (4.0%) were selling Turkey for over 20 years.

FIGURE 6.3 Number of Years Turkey has been Offered as a Holiday Destination



Number of total valid response =50(100%)

Number of Visits to Turkey by British Tour Operators

It was thought that visits to Turkey by the tour operators were an important factor in influencing their experience and familiarity with tourism in the country. Therefore, participants were requested to indicate the number of visits undertaken by anyone in their companies to the country in the last five years.

TABLE 6.5 Number of Visits by Tour Operating Companies' Personnel to Turkey During the Last Five Years

Value Label	Frequency	Percent	Valid Percent	Cum Percent
0 time	4	7.8	8.0	8.0
1-5 times	19	37.3	38.0	46.0
6-10 times	8	15.7	16.0	62.0
11-20 times	8	15.7	16.0	78.0
Over 20 times	11	21.6	22.0	100.0
Not applicable	1	2.0	Missing	
Total	51	100.0	100.0	

Valid cases 50 Missing cases 1

Table 6.5 demonstrates that the majority of tour operators (54%) have visited Turkey up to ten times, while 38 per cent of respondents have visited the country more than ten times during the last five years.

The Table also portrays that four companies' staff had no chance to visit Turkey. It is important to bear in mind that familiarisation tours to various destinations in Turkey are a meaningful method in order to up-date the tour operators' knowledge of the destination. Therefore, the Ministry of Tourism should recognise the importance of familiarisation tours and encourage the maximum number of tour operators and travel agent as a means of marketing the country.

The Importance of Turkey to the Tour Operators

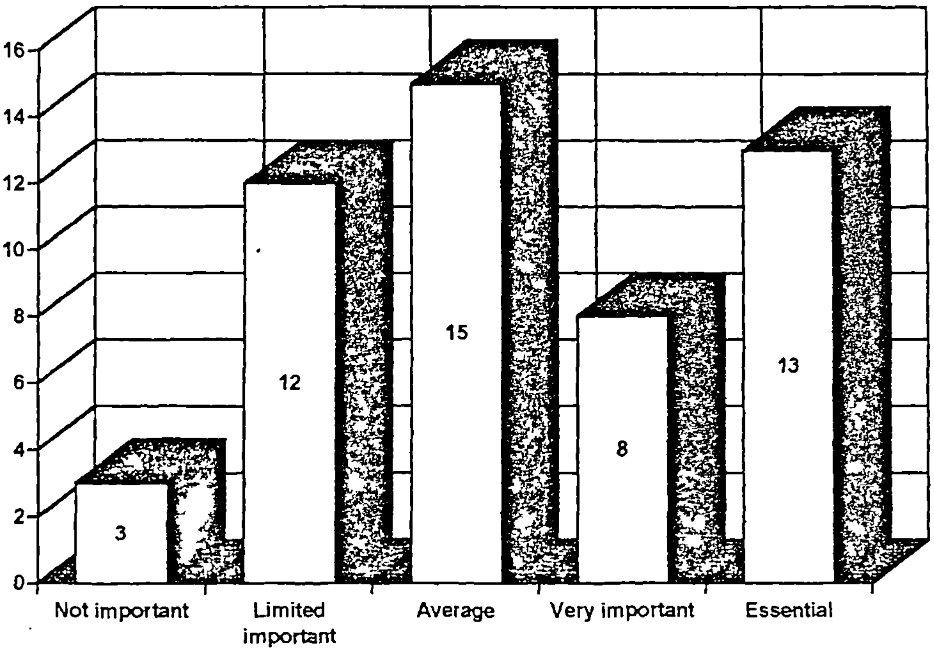
Respondents were asked to identify the degree of importance of Turkey to their companies, among the tourist destination countries offered by them. A five-point Likert scale, ranging from 'not important at all' to 'essential' was used to indicate the degree of importance. Figure 6.4 shows the various degrees of importance below.

As the findings reveals that most of the tour operators (41%) considered Turkey as a tourist destination being 'very important' or 'essential', compared with 30 per cent of them who regarded the country as 'not or limited importance', whereas 29 per cent were in the middle (i.e. neither 'important' nor 'unimportant').

But, it is sensible to say that these findings should not be taken as a sufficient evidence of the importance of Turkey as a tourist destination to the tour operators surveyed. The bigger companies might have the most sales to Turkey but still regard it as less important if it represents a small part of its turnover.

Thus, the questionnaire covered a question about the size of tour operators' proportion of business derived from Turkey that is demonstrated in Table 6.6.

FIGURE 6.4 The Importance of Turkey to the Tour Operators



Number of total valid response = 51(100%)

TABLE 6.6 Tour Operators' Total Business Proportion from Turkey

Business Proportion		Frequency	Percent	Valid Percent	Cum Percent
Less than 10%		18	35.3	35.3	35.3
10-15 %		9	17.6	17.6	52.9
16-20%		3	5.9	5.9	58.8
21-25%		4	7.8	7.8	66.7
26-30%		3	5.9	5.9	72.5
30% and over		14	27.5	27.5	100.0
	Total	51	100.0	100.0	

Valid cases 51 Missing cases 0

The assumption here is that the higher the percentage of total business of tour operating firms that was generated by Turkey, the more familiar the tour operator was with the country.

Using the above criterion, the following comment can be drawn that the majority of tour operators were partly familiar with Turkey as a tourist destination. As the findings of Table 6.6 show, 35 per cent of the tour operators reported that the proportion of their total business originated by Turkey was less than 10 per cent, compared with 65 per cent of them indicated that this proportion was over 10 per cent.

One main conclusion to be derived from the whole discussion in this section is that a high degree of familiarity with Turkey as a tourist destination is held by the tour operators surveyed. Moreover, the results also support the view that Turkey has been promoted by some of tour operators for a relatively short time. Due to the fact that the country has been entered international tourist market only last fifteen years.

The following section will attempt to explore the image of Turkey as perceived by the British tour operators surveyed.

Tour Operators' Image of Turkey

It has been argued previously in the theoretical part of this study that the image of a place as a pleasure travel destination to both tourists receiving countries and tourists is very important. In fact, image to a greater or lesser extent, is derived from attitudes toward the destination's perceived tourism attributes.

Moreover, tourism image reflects tourist's expectations and anticipation (Goodrich 1978, Woodside and Jeffery 1988). To a large extent, image describes the degree to which a tourist area can satisfy tourist needs and wants. From this approach, identifying the attributes of an image of a tourist destination will help to find out adequate ways of improving tourist quality by rearranging tourism products, revising tourism planning. By doing this, it is expected that more tourists can be attracted and more opportunities created.

One purpose of this survey is to identify how Turkey as a tourist destination is perceived by British tour operators in order to provide a reliable base on which the Turkish tourism bodies can establish or adapt their marketing strategies. Thus, respondents were asked to indicate the reasons why British tourists visit Turkey.

A breakdown of the answers received is shown in Table 6.7 according to the frequency of mention. As the findings reveal that nearly all tour operators investigated noticed that holiday/vacation is the first reason (92.2%) for which British tourist visit Turkey.

TABLE 6.7 Tour Operators' Views on the Reasons of Visit By their Clients to Turkey

REASONS OF VISITS	*Frequency*	*Percent*	*Rank*
A. Holiday	47	92.2	1
B. Visit Historic Place	41	80.4	2
C. Good Weather	33	64.7	3
D. Value for Money	32	62.7	4
E. Being at the Sea Side	29	56.9	5
F. Plenty to do and See	24	47.1	6
G. Shopping	17	33.3	7
H. Business	15	29.4	8
I. Attend Conferences	10	19.6	9
J. Health and Spa Treat	8	15.7	10
K. Religion	7	13.7	11
L. Fashionable Destination	7	13.7	11
M. Excellent Yachting Area	5	9.8	12
N. Adventure Holiday	1	2.0	13
O. Scenery	1	2.0	13

Number of total valid response = 51
Responses exceed 100% due to multiple response.
Source: Field Research

The Table also portrays that visit historic places (80.4%), good weather (64.7%), value for money (62.7%) are considered the next three reasons of importance. In addition, being at the seaside (56.9%), plenty to do and see (47.1%) and shopping (33.3%) are regarded to be following important reasons. On the other hand, adventure holiday, scenery, excellent yachting areas were regarded to be least importance reasons.

From the above findings, it can be concluded that in the view of British tour operators, Turkey is regarded as sun, sea, and sand destination like many other Mediterranean countries (France, Spain, Italy, Greece). It can be further concluded that, although Turkey's tourism potential is extremely high and competitive, Turkey offers mass tourism.

In addition, the British tour operators view accords with the development process of the Turkish tourism authorities. It is necessary to note that the country's development goals are being determined in the Five Year Development Plans that have been prepared and carried out by the State Planning Organisation (SPO) since 1963. The aim of these development plans is the planned guidance for every sector, including tourism, in the economy.

Evidently, government policies and activities have revealed that mass tourism was targeted throughout the planned period. Therefore, further expansion will bring many problems. In fact, there are several problems which already exist, as tourism supply is not ready to absorb such a huge expansion.

It is in this sense that Turkey's tourism activities need to be diversified for future development. In fact, Turkey has many potential forms of tourism that have not yet been developed. In order for Turkey to obtain a share of new markets, it is essential to diversify the present activities in tourism, and by doing so, to improve the supply capacity. Golf tourism, winter and mountain tourism, yachting tourism and health and spa tourism can be alternative forms of tourism to develop for the future.

In the following, factors which are affecting an inclusive tour to Turkey, inclusive and independent tour sales in 1994, and airlines most frequently used by the tour operators to send clients to Turkey will be examined.

Factors Affecting an Inclusive Tour to Turkey

In order to determine which factors were the most important, when selling an inclusive tour to Turkey, eleven factors were addressed by the questionnaire. An opportunity to include any others that they thought were important was given to the tour operators. A five-point scale ranging from 'not important' to 'essential' was used. It is important to note that the higher the mean, the more important the factors were considered by the respondents.

From Table 6.8, the cost of the tour topped the table with the mean value of 4.320. This result support the argument in Chapter 4, that the price of tourist services must both satisfy tourists and meet the objectives of the tourism businesses. The majority of tourist are looking for value when they buy a product or service. Thus, pricing policy ultimately helps to determine the success or failure of a product or service in the market place.

The findings also show that the image of the country was ranked the second most important factor when selling an inclusive tour to Turkey. As previously noted in Chapter 3, people react to the world as they perceive it to be, not necessarily as it is, therefore, image is extremely important to destinations. Choosing a destination, or a vacation package, is extremely subjective. It is based on individual likes and dislikes, interests, attitudes, and motives. As a result, image of Turkey internationally with regard to political problems must be improved.

On the other hand Table 6.8 shows that the availability of shopping and entertainment facilities were considered least important factors by the respondents when they sold an inclusive tour to Turkey. It should be noted that one tour operator considered sailing facilities as an essential factor when selling an inclusive tour to Turkey.

TABLE 6.8 Factors which Effect Inclusive Tour to Turkey.

	Not important		Limited important		Average		Very important		Essential		Mean Value
FACTORS	n	%	n	%	n	%	n	%	n	%	*
Accessibility	3	7.0	6	14.0	16	37.2	13	30.2	5	11.6	3.256
Avail. suitable accommod.	3	6.3	2	4.2	8	16.7	22	45.8	13	27.1	3.833
Cost of the tour	-	-	-	-	8	16.0	18	36.0	24	48.0	4.320
Behaviour of local people	1	2.1	6	12.8	12	25.5	18	38.3	10	21.3	3.638
Climate and weather	-	-	3	6.3	14	29.2	18	37.5	13	27.1	3.854
Social + political stability	2	4.3	1	2.1	7	14.9	16	34.0	21	44.7	4.128
Shopping facilities	7	14.9	11	23.4	17	36.2	9	19.1	3	6.4	2.787
Entertainment facilities	10	21.7	8	17.4	16	34.8	10	21.7	2	4.3	2.696
Clean beaches	2	4.5	3	6.8	14	31.8	12	27.3	13	29.5	3.705
Image of the host country	-	-	2	4.3	8	17.0	17	36.2	20	42.6	4.170
Cultural + historical attrac	1	2.0	2	4.1	8	16.3	15	30.6	23	46.9	4.163

* The higher the mean, the more important the factors were considered by the respondents.

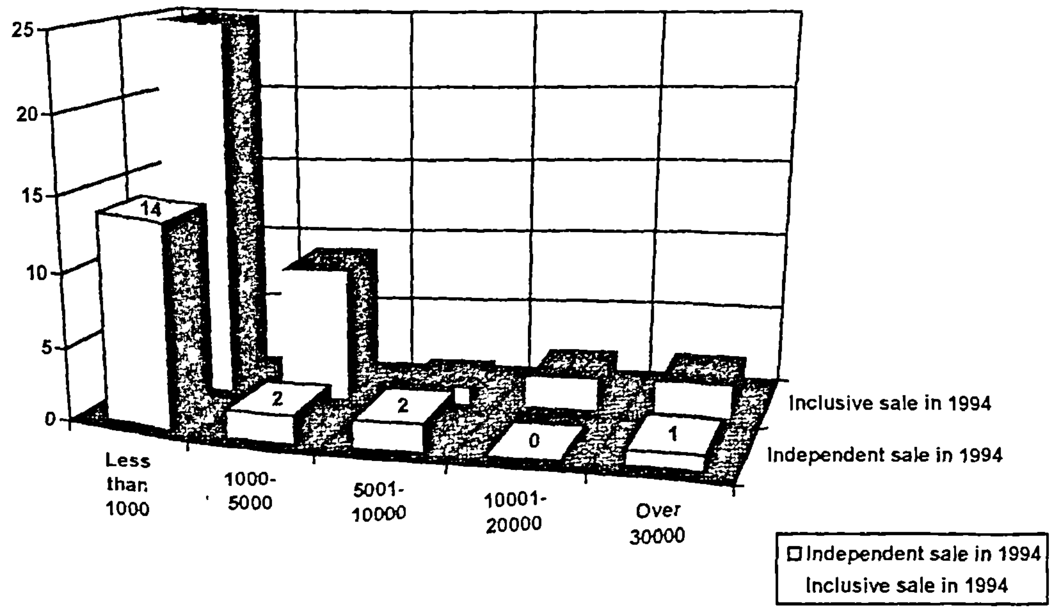
Number of total valid response for Behaviour of local people, Social and political stability, Shopping, Image of the host country are 47; Availability of accommodation and Climate and weather are 48; and Cost of the tour, Cultural and historical attractions, Entertainment, Clean beaches and Accessibility are 50,49,46,44,43, respectively.

Inclusive and Independent Tour Sales in 1994

Question fifteen and sixteen request information on the number of inclusive and independent holiday sold in 1994 by the companies. From the Figure 6.5, it can be seen clearly that the majority of tour operators (87.5%) sold between 1,000-5,000 inclusive tours in 1994. While only 5.1 per cent reported inclusive sales of over

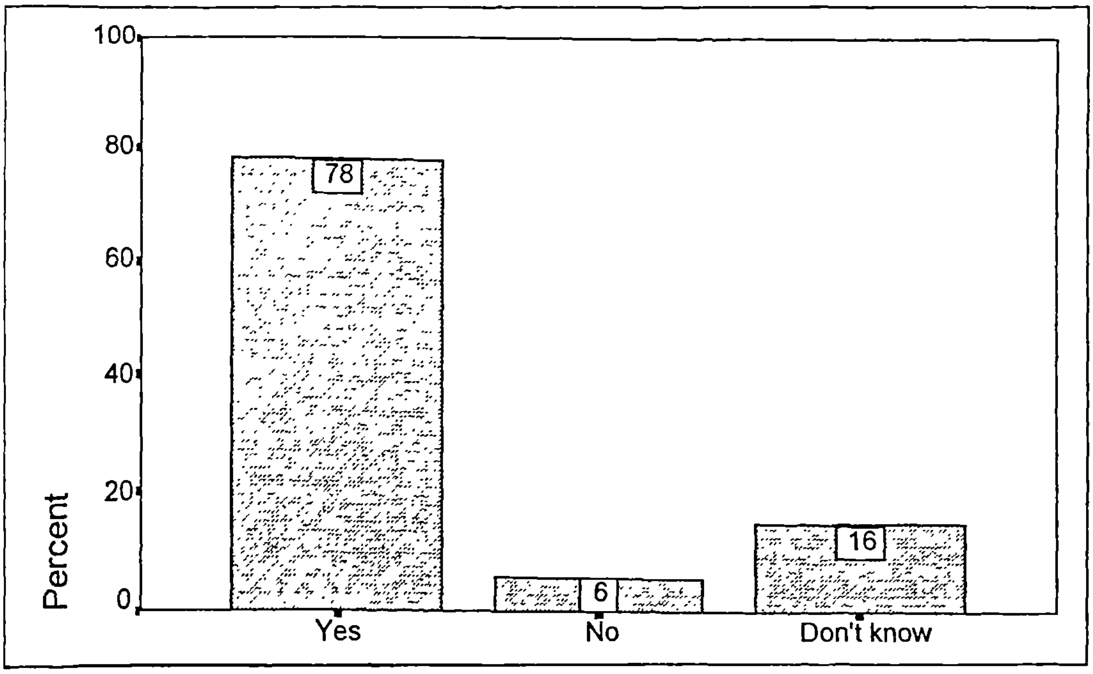
30,000 in 1994. However, 78 per cent of tour operators indicated that their inclusive tour sales to Turkey will increase in the next five years (See Figure 6.6).

Figure 6.5 Inclusive and Independent Tour Sales in 1994



Number of total valid response for inclusive and independent sales are 39 and 19 respectively.

FIGURE 6.6 Anticipated Inclusive Tour Sales to Turkey the Next Five Years



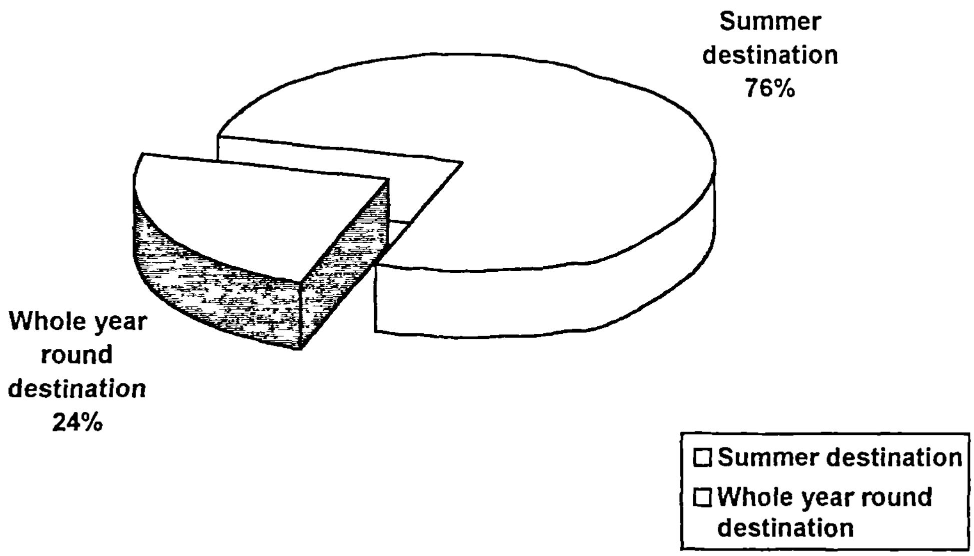
Number of total valid response = 50(100%)

Relating to independent tour sales in 1994, similar result can be drawn; out of 19 respondents, 84.2 per cent sold between 1,000 - 5,000 in 1994. By contrast, only one company (5.3%) recorded sales of over 30,000 in 1994.

Based on this finding, it can be inferred that the majority of the tour operators promoting Turkey were small or medium-sized operators. A similar conclusion could be also be observed from the above analysis on the size of tour operating companies.

As for the period of selling Turkey, 12 (24%) tour operators were selling Turkey as a whole year round destination and 39 (76%) of them were selling Turkey as a summer destination (Referring to Figure 6.7). Holidays offered in summer can be categorised as traditional summer holidays. In other word sea, sand, sun holiday which promised relaxation, peace of mind, entertainment, various sports or outdoor activities by the sea resorts. As some of these resorts are close to ancient sites, historical monuments, historical and cultural aspects of the country are noted as an extra bonus to the interested travellers. Therefore, the majority of tour operators were selling Turkey between May-October.

Figure 6.7 Period of Selling Turkey

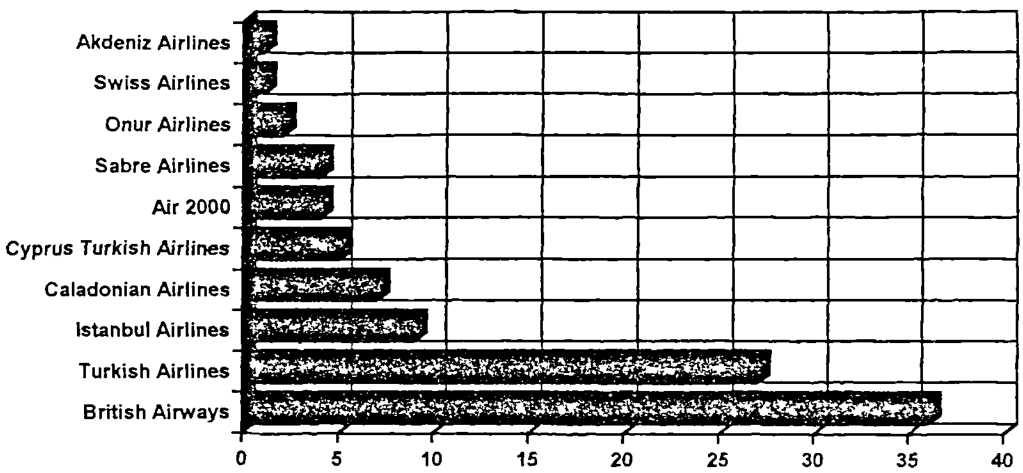


Number of total valid response = 51(100%).

Airlines Most Frequently Used by Tour Operators to Send Clients to Turkey

It is useful to examine the structure of Turkish Airline industry before examining the question. The Turkish airline industry is represented by a relatively large public airline and 15 small private airline firms. Overall it has 98 aircraft, of which 54 (55%) are privately owned and 44 (45%) are publicly owned, with a 14,021 seat capacity, of which 6,781 (48%) belong to private sector and 7,240 (52%) belong to public sector. It must be pointed out that private airlines have come out after 1985 when the government decided to end the monopoly position of publicly owned Turkish Airlines. For instance, 14 out of 15 private airlines have been licensed to operate after 1988 (Kusluvan, 1994).

Figure 6.8 Airlines Most Frequently Used by Tour Operators to send Clients to Turkey



Number of total valid response = 51(100%)

Amongst the most frequently used airlines were listed in the Figure 6.8. British Airways led with 70.6% (36 out of 51 firms answered this question). The national carrier, Turkish Airlines came next with 52.9% followed by Istanbul

Airlines with 17.6%. The fourth airlines frequented was Caladonian Airlines (13.7%).

Although the Turkish private airlines entered into the market in a relatively short period they managed to establish a certain service quality. The findings also reveal that Turkish private airlines play fairly important roles in the UK market. Moreover, the findings also suggest that there is a growing tendency to use charter flights to the country.

Respondents were then asked to indicate what percentage of all inclusive tours they sold to Turkey in 1994 used a Turkish air carrier. A breakdown of the answer is shown in Table 6.9. Twelve companies (27.3%) did not use any Turkish air carrier in 1994. Moreover seven companies (15.9%) used a Turkish air carrier in their programmes for less than 10%. As the findings reveal, fifteen companies (40.9%) have used the Turkish air carrier for over 40%.

TABLE 6.9 Turkish Air Carriers Used in 1994 by the Tour Operators

Value Label		Frequency	Percent	Valid Percent	Cum Percent
0 percent		12	23.5	27.3	27.3
Less than 10%		7	13.7	15.9	43.2
10-20%		7	13.7	15.9	59.1
21-40%		3	5.9	6.8	65.9
41-60%		3	5.9	6.8	72.7
61-80%		1	2.0	2.3	75.0
Over 80%		11	21.6	25.0	100.0
Not applicable		7	13.7	Missing	
	Total	51	100.0	100.0	

Valid cases 44 Missing cases 7

In the above sections, British tour operators' familiarity with Turkey as a tourist destination and their general attitudes towards the country are discussed. The following section will attempt to explore the tour operators' views on Turkey's tourist product, the price of the tourist services, the relations with the Turkish Ministry of Tourism and other tourist organisations, and the promotional activities directed toward them.

The Marketing Activities Undertaken by the Turkish Tourism Organisations

As mention previously in Chapter two, the attractions of a tourist destination can be scenic, climatic, cultural or historical and they exercise a gravitational influence on non-residents. Destination choice can be influenced by one or an amalgam of attractions. Different markets display varying travel motivations and, in consequence, the attraction of a destination will be ranked in accordance to different preferences by these markets.

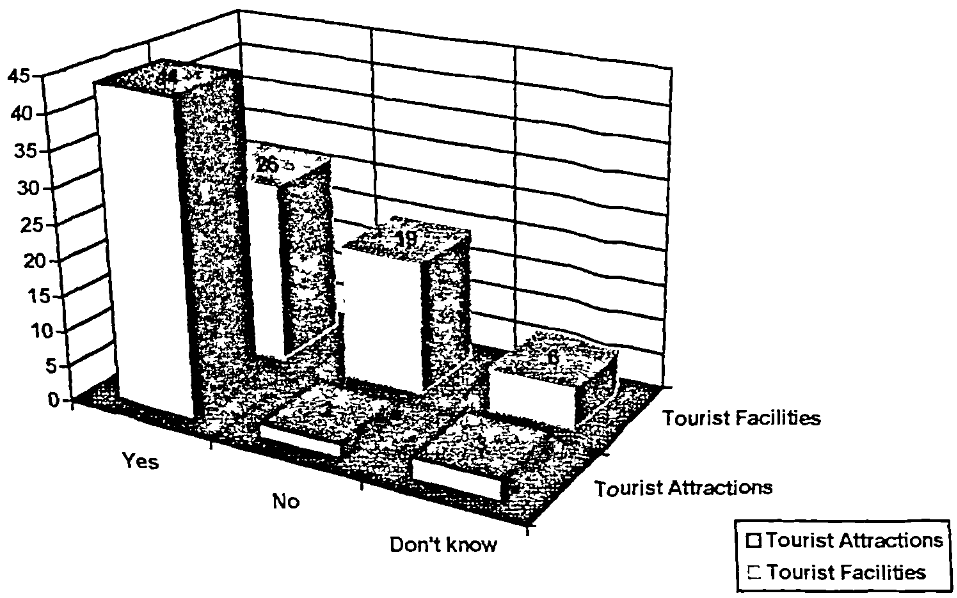
Tour Operators' Views on Turkey's Main Attractions and Tourist Facilities

To gain more insight into the tour operators' experience with Turkey's tourism they were asked to indicate whether or not Turkey's main tourist attractions and tourist facilities are sufficiently developed to meet the needs of British tourists.

From the findings of Figure 6.9 the following comments can be drawn: nearly all tour operators indicated that the main tourist attractions of Turkey are sufficiently developed to meet the needs and requirements of their customers. However, only two of them (4.1%) did not share these views and three of them (6.1%) do not have any idea on Turkey's tourist attractions.

On the contrary, the Figure also indicates that nineteen tour operators (37.3%) think that, at the present time, the tourist facilities in Turkey is not adequate for their clients.

Figure 6.9 Tour Operators' Views on Turkey's Attractions and Facilities



Number of total valid response for tourist facilities = 51

Number of total valid response for tourist attraction = 49

At this point, the tour operators who denoted the inadequacy of Turkey's tourist facilities, were asked to give their views with the purpose of indicating the major improvements that need to be made. In response to an open-ended question, the following are the improvements discussed:

As previously noted in the theoretical part of this study, the tourist product may be seen as a composite product, as an amalgam of attraction, transportation, accommodation and of entertainment. Therefore, absence of accommodation facilities would be a visible obstacle to tourism. In this respect, the majority of tour operators who noted the inadequacy of tourist facilities in Turkey stated that British tourists need more good, middle-range hotels and other type of accommodation. In fact, the demand of today's mass tourists is for two-three star hotels, as they have acceptable facilities.

Another problem pointed out by most of tour operators is the transportation system especially in main touristic areas which needs some improvement. This will help to cut transfer times to major tourists resorts. It is sensible to say that it is not sufficient to possess outstanding scenery if the transportation system of the country does not provide access to that scenery. So without transportation, there is simply no tourism.

In connection with transportation, some of tour operator complained that Dalaman and Adnan Menderes Airports (Izmir) are ineffective in arrivals handling. Tourists have to wait for a long time to get their baggage. This coupled with passport control and visa obtaining at the airport.

The other important issue indicated by the respondents related to tourist facilities in Turkey was their unhygienic conditions. Especially they reported that toilet facilities are not adequate on long road journeys and at the places of attraction, and those accessible are not clean and hygienic.

Although Turkish cuisine is thought by many to rank with French and Chinese as one of the world's great basic cuisines, tour operators are not easily able to find real Turkish cuisine and entertainment. Local entrepreneurs should take into account that it is undeniable an attraction to tourists seeking a new meal experience and entertainment, and is an important determinant of holiday satisfaction.

In addition to the above, one tour operator reported that tourist facilities in Eastern Turkey are inadequate. It is reported that they need major improvement, i.e. accommodation, restaurant, entertainment and with Turkish tour guides with a good knowledge of Eastern Turkey.

Finally, some of tour operators pronounced that tourist facilities need to be improve without spoiling the natural beauty of Turkey. However, some of tour operators further pointed out that to improve too much would probably spoil the attraction.

From the above discussion of the tourist product in Turkey, it may be concluded that tour operators were fairly familiar with the tourist attractions and facilities in the country.

It is important to note that if the Turkish Ministry of Tourism wants to increase the country's share in the international tourist market, they should develop neglected areas of tourist attractions such as the Black Sea and Eastern Anatolia. It was previously argued in Chapter two that regional distribution of accommodation supply is not balanced (See Figure 2.2). Black Sea and Eastern Anatolia together comprised only 3% of total bed supply. As there is a "resort oriented market" for tourism in Turkey, the development of tourist accommodation concentrates at the coast. Therefore the benefits of tourism can not spread in the regions equally. Consequently, government needs to provide basic infrastructure and superstructure in order to decrease the gap between the developed and underdeveloped regions in Turkey and attracts tour operators and encourages them to include them in their programmes.

It is evident from research that tourist services and facilities in Turkey need be to improved, specially, accommodation, transportation, hygienic conditions, toilet facilities.

The next section will attempt to examine the British tour operators' views on prices of Turkey's tourism services and promotional activities carried out by the Turkish tourist organisations.

British Tour Operators' Familiarity with Prices of Turkey's Tourism Services

Respondents were asked to rate some of the prices of Turkish tourist services on a five point Likert scale, ranging from 'very poor value' to 'very good value'. A mean rating score for the price of each tourist service was calculated. It is worth noting that the higher the mean value, the lower the price of the tourist service.

Table 6.10 gave the tour operators' views on the prices of the Turkish tourism services. From the findings of Table 6.10 the following comments can be drawn: a great majority of tour operators under investigation ranging between 29.4 to 77.6 per cent rated the prices of Turkish tourism services as good or very good value. If one taking into account satisfactory value, it can be observed that tour operators' satisfaction with the prices of Turkish tourism services will increase upto between 86.0 to 98.0 per cent.

TABLE 6.10 Tour Operators' Views on the Prices of the Turkish Tourism Services

	V. poor value		Poor value		Satisfac-tory value		Good value		V. Good value		Mean Value
Turkish Tourist Services	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	*
Air flight to Turkey	1	2.0	7	14.3	25	51.0	11	22.4	5	10.3	3.245
Flight within destination	4	9.8	3	7.3	22	53.7	10	24.5	2	4.9	3.073
Accommodation	-	-	2	4.3	17	36.1	21	44.7	7	14.9	3.702
Local transportation	1	2.0	3	6.1	14	28.6	19	38.8	12	24.5	3.776
Food and drinks	1	2.0	-	-	10	20.4	20	40.8	18	36.8	4.102
Excursions	-	-	3	7.0	22	51.2	13	30.2	5	11.6	3.465
Package tour to destina.	-	-	1	2.5	13	32.5	19	47.5	7	17.5	3.800
Shopping	1	2.1	3	6.4	11	23.4	23	48.9	9	19.2	3.766
Entertainment	-	-	6	14.0	18	41.8	14	32.6	5	11.6	3.419

* The higher the mean value, the lower the price of the tourist service.

Number of total valid response for Air flight to Turkey, Local Transportation, Food and drinks are 49; Accommodation and Shopping are 47; Excursions and Entertainment are 43; Flight within destination is 41 and 40 for Package tour to destination.

Clearly, food and drinks' prices appeared to be cheapest with the mean value of 4.102. The explanation for this could be that Turkey produces most of her food. This may contribute to low prices of meals at hotels and restaurants. Package tour destinations and Local transportation with the recorded mean values of 3.800 and 3.776 came in as second and third cheapest prices respectively.

The findings also reveal that some tour operators are not satisfied with prices of flights within the destination and air flights to Turkey. They found that these two services very poor or poor value, i.e. high prices. However, it can be observed that the fact that tour operators rated prices as high does not mean that they are in an absolute sense, since they may have considered that the value of services offered as low. In other words, the sufficiency and efficiency of services received were not as expected in return for prices paid.

As a concluding note, it can be assumed from the above findings that nearly all tour operators surveyed are satisfied with the price of the Turkish tourist services.

British Tour Operators' Views on the Promotional Activities Carried out by the Turkish Tourism Organisations

In this section, the aim is to examine the influence of the promotional activities conducted by the Turkish tourism organisations on the degree of familiarity with Turkey as a tourist destination possessed by the British tour operators. With the purpose of achieving this objective, the level of relations between the Turkish tourism organisations and the tour operating companies, whether or not receiving any funds for their promotional efforts from the Turkish tourism organisations and promotional activities carried out to approach them, will be investigated.

The Strength of Relations Between Turkish Tourism Organisations and the Tour Operators

Tour operators were asked to describe the strength of their relations with the Turkish tourism organisations using a five-point Likert scale ranging from 'very weak' to 'very strong'. The relationship between the Turkish tourism organisations and the tour operating companies under investigation can be described as efficient if the respondents reported very strong, strong and moderate relationship. If they indicated that it was weak or very weak then there was no relationship at all. The higher the value, the more efficient relationship with tour operators.

From Table 6.11 it can be observed that with the exception of the Turkish Tourism Office in London, the private sectors have more efficient relationship with British tour operators compared to the government bodies. The fact that 17.6% of the respondents indicated weak or very weak relationship with the Turkish Tourism Office in London should be a cause of concern. This is important if its role of maintaining necessary travel trade contact, as a point of distribution for the destination's range of tourist products as well as a source of marketing intelligence for the NTO's marketing planning process (Middletion, 1988) were to be effective.

Relationships with the tourism firms appeared to be strongest with the mean value of 3.548. The explanation for this could be that they act as British tour operators' partners in channelling the tourist consumers to the country. Hotels and Turkish Airlines with recorded mean values of 3.447 and 2.795 came in second and sixth respectively. The fact that the relationship with Turkish Airlines was relatively weak, may be explained by a number of factors. Ownership and controlled by the government; having a high prices policy on the services which contributes to higher prices of inclusive package tours. Therefore, the relationship with the Turkish Airlines was ranked sixth in importance.

As a concluding note, Table 6.11 shows an efficient relationship between the Turkish tourism organisations and the British tour operating companies under investigation, where the majority of the sample companies pointed out that their relationship with the Turkish tourism organisations is very strong, strong or moderate.

TABLE 6.11 The Strength of Relationship with Turkish Tourism Organisations

	Very Strong		**Strong**		**Moderate**		**Weak**		**Very Weak**		**Mean Value**
Tourism Organisations	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	*
Ministry of Tourism	9	19.6	7	15.2	14	30.4	9	19.6	7	15.2	3.043
Tourism Office in London	13	25.5	19	37.3	10	19.6	4	7.8	5	9.8	3.608
Turkish Airline	6	13.6	4	9.1	18	40.9	7	15.9	9	20.5	2.795
Hotels	8	17.0	15	31.9	17	36.2	4	8.5	3	6.4	3.447
Tourism Firms	11	26.2	11	26.2	14	33.3	2	4.8	4	9.5	3.548
Travel Agencies	11	26.2	9	21.4	14	33.3	1	2.4	7	16.7	3.381

* The higher the value, the more efficient relationship with tour operators.

Number of total valid response for Ministry of Tourism, Tourism Office in London, Turkish Airline, Hotels are 46,51,44,47 respectively and 42 for Tourism firms and Travel Agencies.

Participants were asked an open-ended question invited to express their suggestions in order to improve these relations. Tour operators who reported weak or very weak relationships emphasised the following suggestions:

With regard to the private tourism enterprises, their suggestions centred on the need to realise the importance of improving their services and quality through strong experienced staff with the right information. Indeed, delivering superior service quality appears to be a prerequisite for success in the international tourism sector. It is also suggested that private tourism firms need to find new destinations and tourism activities throughout Turkey where tourist facilities are available but under used.

There is a need for Turkish private tourism enterprises to be more responsive to the general market conditions of the tourist generating countries and be more competitive in their pricing policies in relation to neighbouring countries.

In relation to the public sectors, the respondents felt that their presence should emphasise more communication, co-ordination and co-operation with tour operators and travel agents. In order to do this, the Turkish Ministry of Tourism should organise more conferences, and extensive meetings with the travel trade. Some tour operators proposed that the Turkish Ministry of Tourism should promote Turkey as an Autumn/Winter destination and not just its beaches; not all tour operators offered beach holidays. Moreover, the Turkish Ministry of Tourism and its representative in London should have closer involvement with the tour operators to increase its knowledge of the needs, wants and expectations of the British market.

Frequency of Receiving Funds From Turkish Tourist Organisations to Promote Tourism in Turkey

The frequency of receiving funds to promote tourism in Turkey was another area for investigation. Tour operators were asked to indicate how often their agencies have been approached by any of the Turkish tourist organisations in order to promote Turkey. Again a five-point Likert model was used ranging from 'never', 'once a year', 'twice a year', 'three times a year' and 'over three times a year'. The responses were than ranked according to the mean values and presented in Table 6.12. The higher the mean, the more often the Turkish tourist organisations contact of the tour operators.

It was presumed that promotional efforts of the Turkish tourist organisations would be considered as being active if British tour operators received support 'three times a year' or 'over three times a year'. If respondents received 'once a year' or 'twice a year', the Turkish tourist organisations would be considered as inactive in their promotional efforts. Those Turkish tourist organisations who 'never' contacted tour operator with respect to give promotional support, would be classified as non-users of promotion as an element on their marketing strategies.

TABLE 6.12 Frequency of Receiving Funds From Turkish Tourist Organisations to Promote Tourism in Turkey.

	Never		**Once a year**		**Twice a year**		**3 times a year**		**>3 times a year**		**Mean Value**
Tourism Organisations	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	**n**	**%**	*****
Ministry of Tourism	41	89.1	3	6.5	1	2.2	-	-	1	2.2	1.196
Tourism Office in London	38	79.2	4	8.3	2	4.2	2	4.2	2	4.2	1.458
Turkish Airline	44	95.7	1	2.2	-	-	1	2.2	-	-	1.087
Turkish Hotels	43	93.5	2	4.3	1	2.2	-	-	-	-	1.087
Travel Agencies	44	95.7	2	4.3	-	-	-	-	-	-	1.043

* The higher the mean, the more often the Turkish tourist organisations contacts tour operators.

Number of total valid response for Ministry of Tourism, Turkish Airlines, Hotels and Travel Agencies are 46 respectively and 48 for Tourist Office in London.

Using the mentioned criteria, it can be argued that a great majority of tour operators (an average 90.6%) reported that the Turkish tourist organisations never approached them in order to support promotion of Turkey. Consequently, all Turkish tourist organisations were considered as inactive in their promotional efforts. Only a very small proportion of respondents reported that they received funds for their promotional activities from the Turkish Ministry of Tourism and its representative in London.

From the above analysis, it can be concluded that Turkish tourist organisations in general should extent the circle of communications to cover all tour operators who are selling Turkey as a tourist destination. Moreover, the public sector (The Ministry of Tourism, its representative in London and Turkish Airlines) should increase their promotional efforts to be more effective in the British market.

The Promotional Activities of the Turkish Tourist Organisations Directed Towards British Tour Operators

With the purpose of obtaining more insight about the promotional efforts of the Turkish tourist organisations, British tour operators were asked to indicate the promotional activities directed towards them by those organisations. Six methods were proposed to the respondents; they were also requested to add any others which were not included. The answers were ranked and presented in Table 6.13.

TABLE 6.13 The Promotional Activities Carried Out by the Turkish Tourist Organisations In Order to Familiarise Tour Operators

PROMOTIONAL ACTIVITIES	Frequency	Percent	Rank
A. Educational tours	26	51.0	1
B. Direct mailing of tourist literatures	21	41.2	2
C. Tourism workshops	14	27.5	3
D. Newsletters	14	27.5	3
E. Calls by Turkish sale representatives	7	13.7	4
F. National weeks and evenings	6	11.8	5

Number of total valid response = 51
Responses exceed 100% due to multiple response.
Source: Field Research

Clearly, educational tours (i.e. to inspect Turkey's tourist facilities and attractions) to various destinations in Turkey were considered as the most important method by the tour operators. More specifically, 51% of the tour operators ranked this method as their number one tool. It is widely agreed that educational tours may inform and familiarise tour operators with the tourist industry in the country and to promote visit to its attractions.

Direct mailing of tourist literature with 41.2% came second. The aim of mailing is to keep tour operators well stocked with promotional litteratures on the country and therefore to be in better position, to meet inquires from their actual and prospective customers. Such activities may help to promote and sell the country as a tourist place. Newsletters and tourism workshops were ranked third followed by calls by Turkish sales representative.

Returning to the Table 6.13, it can be seen clearly that national weeks and evenings were regarded as the least promotional of activities (11.8%). This neglected promotional activity may be attributed to the scarcity of funds available for promotion. What is important here is that the Ministry of Tourism should take into account the usefulness of this promotional activity in order to familiarise and educating tour operators about tourism in Turkey and therefore making them more able to promote the country.

To this end from the whole analysis of promotion policy, it might be concluded that the Turkish tourist organisations have a fairly efficient relation with British tour operators offering the country as a tourist destination. Moreover, it should be added that the promotional efforts undertaken by these organisations to support and strengthen these relations can be much better level.

Major Problems in Selling Holidays to Turkey

The purpose of this question was to explore the tour operators' views on the problems faced when selling holidays to Turkey. In response to an open-ended question asked, the following are the major problems discussed in order of importance: political and social unrest, competition among main tour operators, long transfer to certain resorts such as Bodrum and Gumbet, human rights records, findings suitable accommodation (See Table 6.14).

TABLE 6.14 Major Problems in Selling Holidays to Turkey

Business Difficulties	No. Of Tour Operators Mentioning	Ranking
Political and social unrest	19	1
Competition among main tour operators	6	2
Long transfer to certain resorts	4	3
Human rights records	3	4
Funding suitable accommodation	3	4

Source: Field Research

Table 6.14 portrays that the political situation in Turkey brought business difficulties to the UK tour operators. It is commonly agreed that the phenomenon of tourism is very sensitive (Richter, 1992). Therefore, any political instability can cause tourism arrivals and receipts to plummet. Hence, the government should recognise that long-term wealth and political security are necessary to achieve good tourism performance.

Respondents also indicated that long transfer times from airport to most holiday resorts was another problem. If an airport is built at Milas, this will ease the problem for Aegean area.

The other important problem faced by the tour operators was that finding suitable accommodation. A tour operator pointed out that "a large number of tourist these days want a basic good room and accommodation for a reasonable price and are not prepared to pay the cost of five star hotels". Consequently, the government needs to concentrate on the budget and middle range hotels and other types of accommodation.

In addition to the above problems there are several other problems which UK tour operators encounter when selling Turkey, such as lack of advertising in the media from Turkish sources, overall cost of the tour, and the image of Turkey. As previously argued, that image is a vital intangible factor in the marketing of a tourism product (Doswell, 1990). Thus, destination image is a crucial component of a destination's tourism product. Furthermore, a tourist's choice of a vacation destination is greatly influenced by his or her perceptions of it. Unfortunately, generally speaking Turkey does not have a good image.

Best Features of Holiday in Turkey Reported by Tour Operators' Clients

Respondents were requested to assess their clients' views on Turkey as a tourist destination. Superlatives such as "great", "excellent" was used by the respondents. As can be seen from Table 6.15 the following are mentioned in order of frequency: Turkish hospitality, value for money, great weather, beautiful scenery, Turkish food, interesting historical sites, enjoyable cultural differences, excellent beaches.

TABLE 6.15 The Best Features of Holidays in Turkey Reported by Tour Operators' Clients

The Best Feature of Holiday in Turkey	*No. of Tour Operators Mentioning*	*Ranking*
Turkish hospitality	28	1
Value for money	15	2
Great weather	13	3
Beautiful scenery	11	4
Turkish food	7	5
Interesting historical sites	6	6
Enjoyable cultural differences	4	7
Excellent beaches	4	7

Source: Field Research

Complaints Reported By British Tourist After a Visit to Turkey

As for the common complaints of British tourists returning from a visit to Turkey, tour operators reported that although in general all customer were fairly satisfied, they received some complaints on standards of accommodation, cost of transportation to airports, passenger handling at Izmir and Dalaman Airports, lack of toilet service, and to find good Turkish meals (Table 6.16).

TABLE 6.16 Complains Reported By British Tourist After a Visit to Turkey

Complains From Tourists	No. of Tour Operators Mentioning	Ranking
Poor quality of accommodation	10	1
Cost of transportation to airports	4	2
Passenger handling	3	3
Lack of toilet services	2	4
Difficult to get good Turkish meals	1	5

Source: Field Research

Comments by the Tour Operators

An open-ended question at the end of the questionnaire invited British tour operators to express their views of the Turkish tourism industry. Typical and familiar remarks related to their views are reproduced here:

Many respondents expressed concern about the possibility of over development, "Control ugly and haphazard building of cheap villas and hotels" and "Uncontrolled development will destroy the beauty and quiet of the country" are not uncommon remarks. In connection with this issue another respondent pointed out that "Turkey is following the same route as Spain did, many years ago. Trying to get as many clients as possible, at the lowest possible price and ignoring *quality*. This lead to the death of tourism to Spain in the 1980's." In addition a number of responses mentioned that over development would not spoilt the beauty of the country and hospitality of its people.

As Cooper and Ozdil (1992) argued that Turkey's late entry into the international tourism industry should have enabled it to learn from the experience of other destination such as Spain and Greece. However the rapid growth of tourism has not served Turkey well and many of the problems are rooted in Turkey's management of tourism. Therefore, the Ministry of Tourism should change pattern of mass tourism development to other form of tourism where volume is not seen as the criterion for success.

Some other respondents suggested that the entry visa should be removed, since the 10 pounds tourist visa charge irritates UK nationals. They further pointed out that "some other nationals do not have either to pay or suffer the inconvenience of being delayed up to one and half hours on arrival".

Another suggestion made in connection with baggage handling at certain airports. Hence, there is a need re-organise baggage handling at all airports so that tourists can use trolleys on arrival and on departure. This is not possible now and causes great irritation and a bad final impression on departure.

A respondent suggested that the country requires a better profile on terrorist activities. It was expressed that "in fact this is much lighter than undertaken by the IRA in this country. However media coverage and foreign office advice has painted an unfair picture of a dangerous country". Therefore a more effective campaign has to be undertaken by the Turkish tourist office in London and government to counter the adverse publicity.

Finally, a small number of respondents suggested that more should be done by Turkish Airlines in marketing the country to increase awareness in the UK.

Conclusion

In this chapter, an endeavour was made to examine to what extent the UK tour operators were familiar with Turkey as a tourist destination and their attitudes towards the country, and the extent to which this familiarity was influenced by the marketing activities undertaken by Turkish tourism organisations.

From the whole analysis, it can be concluded that Turkey deals with a relatively large -one hundred and fourteen- number of tour operating companies in Britain. As explained in the methodology chapter in this study, these tour operators can be grouped as follows: Sixty-one of them are featuring summer holidays, ten of them winter holiday, twenty-one of them short breaks, twenty-five of them sailing and cruising and thirty-one of them were special interest tour operators. Although the geographic dispersions of tour operators differed, major tour operators were based in London. The majority of the tour operators are familiar with Turkey as a tourist destination, which is perceived as a destination to be visited mainly for its good weather together with value for money and the historic attractions. In other words, they regarded it as a sun, sea, and sand destination.

Moreover, some tour operators pointed out that the tourist facilities in Turkey needed improvement in order to be considered adequate by European standards. Quality of accommodation, passenger handling at airports, toilet services at certain places are some example of needed improvements.

The majority of tour operators surveyed are satisfied to a great extent with the price of tourist services in Turkey. A few tour operators were not satisfied with prices of flights within the destination and to Turkey. However, in the view of the tour operators the price of food and drinks' appeared to be cheap. The explanation for this could be that Turkey produces most of her food. This may contribute to low prices of meals at hotels and restaurants. Therefore, tour operators' satisfaction with the price of the Turkish tourist services can be an advantage at the international tourist market.

Considering the findings, it can be inferred that the Turkish tourist organisations have a fairly efficient relation with British tour operators offering the country as a tourist destination. However, the findings also showed that there are no great promotional efforts directed towards the tour operators to sustain the continuity of these relations. The majority of tour operators under investigation remarked that they never received any promotional funds from any of the Turkish tourist organisations. This may be due to the fact that there is a shortage of funds available for promotion.

Therefore, it can be concluded that the first hypothesis is not generally supported, i.e. the degrees of familiarity with Turkey as an international tourist destination country possessed by the UK tour operators and their attitudes towards Turkey are influenced by the marketing activities of the Turkish tourism organisations.

In the next chapter, an attempt will be made to explore the image and expectations of British tourists about Turkey as a tourist destination, as well as their experience and satisfaction with the country.

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Chapter Seven

British Tourists' Survey

Data Analysis and Findings

INTRODUCTION

The purpose of this chapter is to examine the findings related to the tourists' survey in order to test the hypotheses (two to five) which put forward in chapter five.

The chapter firstly looks at the socio-economic characteristics of a sample of the British tourists who are visiting Turkey. The rest of the chapter will explain the analysis and results under investigation.

The tourists' survey questionnaires were conducted for a three months period in June, July and August 1995. A total of 400 people was chosen as the survey sample. Of these questionnaires 61 were incomplete and therefore were discarded. A total of 339 usable questionnaires was finally entered into the analysis, representing a response rate of 84.8 per cent.

SOCIO-DEMOGRAPHIC PROFILES OF BRITISH TOURISTS VISITING TURKEY

Socio-demographic characteristics of British tourists to Turkey are demonstrate in Table 7.1 through Table 7.5 and Figure 7.1. The objective is to provide a basis for future marketing activities of the Turkish tourist organisations targeted to reach the British market.

Age Groups

The Table 7.1 presents the age of the respondents. Table 7.1 indicates that 25.1 per cent of the sample was under 25 years, while those respondents who were over 65 years represent only 2.9 per cent of the sample. It is worth noting that the majority of the respondents were in the 25-34 age group that represent 30.1 per cent of the total. The point to be understood here is that the majority of the British tourists visiting Turkey were young people.

TABLE 7.1 Age Groups of the British Tourists Customers of Turkey

Value Label		Frequency	Percent	Valid Percent	Cum Percent
Under 25 years		85	25.1	25.1	25.1
25-34 years		102	30.1	30.1	55.2
35-44 years		55	16.2	16.2	71.4
45-54 years		69	20.4	20.4	91.7
55-64 years		18	5.3	5.3	97.1
Over 65 years		10	2.9	2.9	100.0
	Total	339	100.0	100.0	

Valid cases 339 Missing cases 0

Marital Status

Of the total number of respondents in the study, 172 (50.7%) were females and 167 (49.3 %) were males (See Table 7.3). Concerning marital status, Table 7.2 below shows that the majority (51.5%) of the sample of British tourist visiting Turkey were married couples.

TABLE 7.2 Marital Status of the British Tourists Visiting Turkey

Value Label		Frequency	Percent	Valid Percent	Cum Percent
Single		147	43.4	43.5	43.5
Married		174	51.3	51.5	95.0
Widowed/ Divorced		17	5.0	5.0	100.0
Not applicable		1	.3	Missing	
	Total	339	100.0	100.0	

Valid cases 338 Missing cases 1

TABLE 7.3 Sex Status of the British Tourists Visiting Turkey

Value Label		Frequency	Percent	Valid Percent	Cum Percent
Male		167	49.3	49.3	49.3
Female		172	50.7	50.7	100.0
	Total	339	100.0	100.0	

Valid cases 339 Missing cases 0

Classification of the British Tourists By Educational Levels

The Table 7.4 portrays educational levels of the respondents. The majority (53.3%) of the respondents had below university level education, in contrast 46.7 per cent of the respondents had university degrees of which 9.4 per cent had post graduate degrees.

Classification of the British Tourists By Annual Family Income

Respondents were asked to identify their family total income per year. The answer received on this question displays in Table 7.5. As can be seen in Table 7.5 that the majority (70.3%) of respondents have income of less that £30,000, while

16.8 per cent declared among £30,000 to £39,999 and 12.9 per cent claimed that their annual family income was over £40,000. It should be noted that thirty-six respondents failed to supply information concerning annual family income.

TABLE 7.4 Classification of the British Tourists of Turkey by Educational Levels

Value Label		Frequency	Percent	Valid Percent	Cum Percent
Elementary school		20	5.9	6.1	6.1
Secondary school		156	46.0	47.3	53.3
University		123	36.3	37.3	90.6
Post graduate		31	9.1	9.4	100.0
Not applicable		9	2.7	Missing	
	Total	339	100.0	100.0	

Valid cases 330 Missing cases 9

TABLE 7.5 Classification of the British Tourists Visiting Turkey by Income Levels

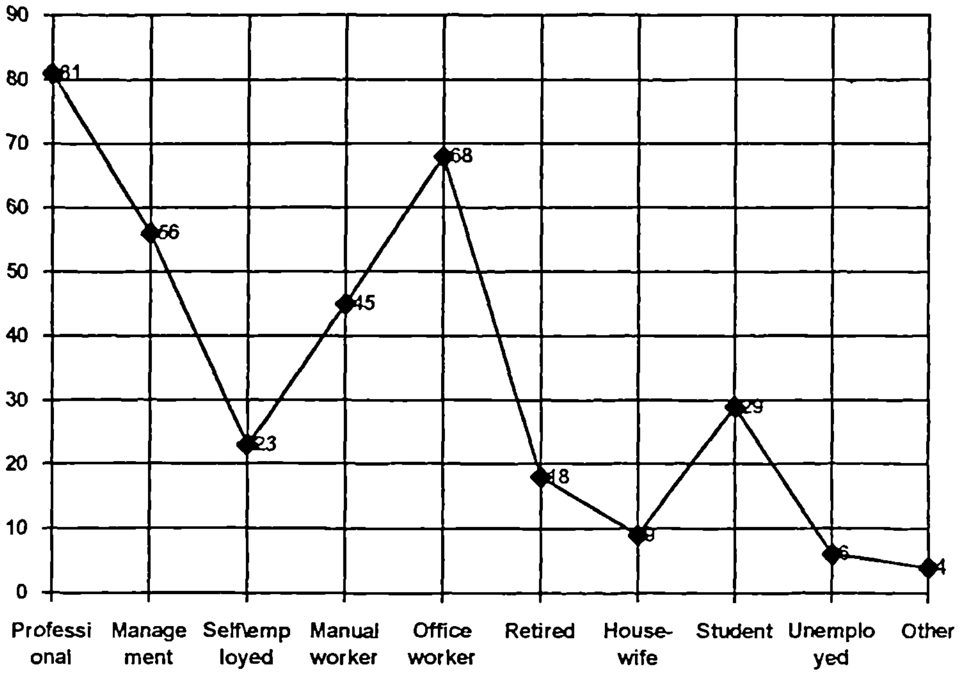
Value Label		Frequency	Percent	Valid Percent	Cum Percent
Under £10,000		27	8.0	8.9	8.9
£10,000-£19,999		82	24.2	27.1	36.0
£20,000-£29,999		104	30.7	34.3	70.3
£30,000-£39,999		51	15.0	16.8	87.1
£40,000-£,999		19	5.6	6.3	93.4
£50,000 and over		20	5.9	6.6	100.0
Not applicable		36	10.6	Missing	
	Total	339	100.0	100.0	

Valid cases 303 Missing cases 36

Occupational Status of the British Tourists Visiting Turkey

Information about the respondents' occupational status is found in Figure 7.1. The answers received on this question were the least among the other demographic differences. The majority 81 (23.9%) of the respondents were professionals i.e., doctors, lawyers and so on. The same Figure also showed that 68 (20.1%) of the respondents were office worker. The remainings were other occupations.

FIGURE 7.1 Classification of the British Tourists Visiting Turkey by Profession



Number of total valid response = 339(100%)

From the findings in Table 7.1 through Table 7.5 and Figure 7.1 the following comment can be made. The major segment in the sample of British tourists visiting Turkey was mainly married, have had below university level education, aged between 25 and 34 years, and with a family total income per year of between £20,000 to £29,999.

BRITISH TOURISTS' IMAGE AND EXPECTATIONS OF TURKEY AS A TOURIST DESTINATION

The purpose of this section is to test the validity of hypotheses number two and three which put forward previously in chapter five. The second and third hypotheses, re-stated here for the benefit of the reader:

Hypothesis 2:

The attitudes of British tourists towards Turkey as a tourist destination is influenced by the marketing activities of the Turkish tourism bodies, and UK tour operators offering the country as a tourist place.

Hypothesis 3:

The travel motivations of the British tourist are probably attributable to Turkey's good weather and being a "sun, sea and sand" holiday destination.

It is important to note that there are no previous studies that specifically investigate the image and expectation, the wants and needs, and likes and dislikes of the British tourists to Turkey. It is hoped that this research will bridge this gap.

British Tourists' Visits to Turkey

As the findings reveal in Table 7.6 that the majority (69.6%) of tourists in the sample were visiting Turkey for the first time. However, 30.4 per cent of the respondents were repeating visits to Turkey. This may be because of business in Turkey or it could be that they may have experienced the attractions and facilities of the country.

TABLE 7.6 Number of Visits Made by British Tourists to Turkey

Visits to Turkey	**Number**	**Percentage**
First visit	236	69.6
Second and subsequent visits	103	30.4

Number of total valid response = 339(100%)

Source: Field Research

With the purpose of getting more information about the level of experience of those customers with Turkey, they were asked to specify the number of their visits to the country during the last five years. As can be seen from the Table 7.7 the majority (66.0%) of respondent visited Turkey at least twice during the last five years. Additionally, the length of stay of the British tourists in Turkey will be analysed later in this chapter.

TABLE 7.7 Number of Visits Made by British Tourists to Turkey During the Last Five years

Visits to Turkey during the last five years	Number	Percentage
Twice	68	66.0
Three times	17	16.5
Four times	7	6.8
Five times	5	4.9
Six and over times	6	5.8

Number of total valid response = 103(100%)
Source: Field Research

Purpose of Visit to Turkey

In order to determine the purpose of visit of the British tourists, respondents were asked to specify the purpose(s) for their vacation. As can be noticed from Table 7.8, the top three purposes of visit considered by the respondents were "holiday/vacation", "cultural attraction", and "shopping". They were ranked as number one, two and three respectively in order of importance. At the other end of the table, "business" and "meeting/convention" were considered the least important purpose for visiting Turkey.

TABLE 7.8 Purpose of Visit to Turkey by the British Tourists

PURPOSE OF VISIT	*Frequency*	*Percent*	*Rank*
A. Holiday/vacation	310	91.4	1
B. Culture	123	36.3	2
C. Mainly shopping	72	21.2	3
D. Visiting friends and relatives	55	16.2	4
E. Health and spa treatment	41	12.1	5
F. Religion	29	8.6	6
G. Business	27	7.9	7
H. Meeting/convention	6	1.7	8

Number of total valid response = 339 (100%)
Responses exceed 100% due to multiple response.
Source: Field Research

The Reasons and Expectations Considered to be Important for the British Tourists' Visit to Turkey

All British tourists who participated in this survey were asked to specify which of the fourteen reasons and expectations proposed to them by the questionnaire were important for their visit to Turkey. Moreover, respondents were also given the opportunity to add any other that were thought of importance. A five-point Likert scale ranging from 'not important at all' to 'essential' were used. These reasons and expectation are listed according to the mean value and showed in Table 7.9. It is necessary to note that the higher the mean, the more important the reason was considered by the British tourists.

Clearly, from Table 7.9 it can be observed that the prime reason for the British tourists' visit to Turkey was the good weather and being on the seaside. The urge to have good weather and be on the seaside in Turkey were considered by a great majority (91.1%) of respondents as very important or essential. This result supports the conclusion derived from the findings of tour operators' survey where the British tour operators perceived Turkey as a sun, sea, and sand destination to visit.

Warm, friendly people with the mean value of 4.176 was ranked the second most important factor for which the British tourists visit Turkey. The Table indicates that 79.1 per cent of respondents thought this basic demand as very important or essential, contrasted with only 4.8 per cent who placed no or limited importance on it.

This result also supports the view mentioned early in the theoretical (Chapter three) part of this study that tourists avoid places where they are not accepted and welcomed. It is important to bear in mind that nobody will visit places where rudeness has replaced courtesy and where animosity has taken place of hospitality. Therefore, the local residents' attitudes toward tourists are greatly important.

Table 7.9 also shows that the sample visited Turkey because of the expectation of things to do and see there, where 73.8 per cent of respondents considered this expectation very important or essential, as opposed to 5.4 per cent of them who placed not or of limited importance. This result was also concluded from the British tour operators' point of view as an importance reason to visit Turkey (See Chapter 6).

There are small difference in the mean value for the remaining reasons between 4 to 10. This can be interpreted that British tourists viewed these reasons as being of nearly similar importance. Yet, reasons such as; clean beaches, feeling of personal security, comfortable accommodation were stated as being important in the ranking by British tourists for their visit to Turkey. These factors may be part of the sun, sea, and sand destinations' basic needs. British tourists would first assure these basic demands were available and then increase his/her choice on other factors availability.

TABLE 7.9 Reasons and Expectation for Travelling to Turkey

	Not important		Limited important		Average		Very important		Essential		Total	Mean Value
Reasons and Expectations	n	%	n	%	n	%	n	%	n	%	n	*
1. Good weather	3	0.9	2	0.6	25	7.4	57	16.9	250	74.2	337	4.629
2. Warm, friendly people	7	2.1	9	2.7	54	16.1	114	33.9	152	45.2	336	4.176
3. Plenty to do and see	8	2.4	10	3.0	70	20 8	112	33.3	136	40.5	336	4.065
4. Clean beaches	13	3.9	19	5.6	50	14 8	117	34.7	138	40.9	337	4.033
5. Feeling of personal security	15	4.5	21	6.3	71	21.4	107	32.2	118	35.5	332	3.880
6. Comfortable accommodation	9	2.7	24	7.1	89	26.5	99	29.5	115	34.2	336	3.854
7. To enjoy a different cuisine	28	8.3	32	9.5	89	26.4	112	33.2	76	22.6	337	3.522
8. Take a bargain priced vacation	29	8.7	49	14.7	79	23.7	87	26.0	90	26.9	334	3.479
9. Visit historic places	49	14.6	55	16.4	82	24.4	85	25.3	65	19.3	336	3.185
10. Adventure	53	16.4	53	16.4	90	27.8	80	24.7	48	14.8	324	3.052
11. Range of water sports	83	25.1	56	16.9	74	22.4	66	19.9	52	15.7	331	2.843
12. Suitable for family vacation	123	36.8	44	13.2	44	13.2	57	17.1	66	19.8	334	2.698
13. Simple for reasons of curiosity	66	20.8	61	19.2	119	37.4	53	16.7	19	6.0	318	2.679
14. To go a newly fashionable des.	105	32.3	63	19.4	72	22.2	54	16.6	31	9.5	325	2.517

Number of total valid response = 339 (100%)
Source: Field Research

* The higher the mean value, the more important the reason was considered by the British tourists.

Due to the fact that Turkey is regarded as a sun, sea, and sand destination like many other Mediterranean countries by the British tourists, respondents indicated that the availability of clean beaches in Turkey was considered to be very important or essential to 75.6 per cent of them, compared with 9.5 per cent who reported no or limited importance in this respect.

From the Table 7.9 it can be noticed that 67.7% of the sample considered their feeling of personal security to be an important factor for their visit to Turkey.

Moreover, comfortable accommodation was also considered to be another important factor for the British tourists' holiday in Turkey where 63.7 per cent of respondents stated its importance, as opposed to only 9.8 per cent of them who did not care about it.

The last four reasons and expectations in the Table 7.9 were considered to be unimportant reasons for visiting Turkey. Especially, the majority of respondents did not visit the country for; the availability of a range of water sports (42 per cent not important, 35.6 essential); suitable for family vacation (50 per cent not important, 36.9 essential); simply for reasons of curiosity (40 per cent not important, 22.7 essential); and to go to a newly fashionable destination (51.7 cent not important, 26.1 essential).

In the following section, an attempt will be made to identify the relationship, if any, between reasons and expectation considered of importance for the British tourists' visit to Turkey and their demographic differences.

The Relationship Between Important Reasons and Expectations for Visiting Turkey and Demographic Differences

To examine the relationship, between the dependent variables -reasons and expectations considered of importance for the British tourists' visit to Turkey- and independent variables -age, gender, marital status, educational and income groups, and employment status-, a cross-tabulation analysis was performed. The statistical measure of goodness-of-fit test of significance (Chi-square) was used between them. The relationships were significant at the 95% and 99% level of confidence. In the following these relationships will be look at in some detail.

The Relationship Between the Importance of 'Curiosity' and Demographic Differences

Apart from age and educational groups, all other demographic dimensions appeared to be statistically not related to curiosity as an important reason for respondents' visit to Turkey. The findings in Table 7.10 show that the respondents belonging to the youngest age group (under 25 years) were the most concerned with the reason in question compare with the oldest age groups (65 and over years). With regard to educational groups, graduate and postgraduate level were more concerns with curiosity among other educational groups.

The Relationship Between the Importance of 'Visit Historic Places' and Demographic Differences

The findings of Table 7.11 indicate that very clear relationships exist between the different age groups, and marital status, and the importance of visiting historical attractions of Turkey as a reason for the British tourists' visit to the country. The Table demonstrates that respondents of the older age group (55 and over years) were more interested in visiting Turkey than youngest age groups (under 35 years). In respect to marital status, all groups had nearly similar views with the reason in question.

TABLE 7.10 The Importance of 'Curiosity' by Demographic Differences

Demographic Differences		Not important	Limited important	Average	Very important	Essential	Total each group
*Age Groups (*1)*							
1. Under 25 years	No	18	15	29	21	1	84
	%	21.4	17.9	34.5	25.0	1.2	100
2. 25-34 years	No	16	21	43	15	5	100
	%	16.0	21.0	43.0	15.0	5.0	100
3. 35-44 years	No	14	10	17	6	3	50
	%	28.0	20.0	34.0	12.0	6.0	100
4. 45-54 years	No	8	10	28	9	7	62
	%	12.9	16.1	45.2	14.5	11.3	100
5. 55-64 years	No	6	2	2	2	2	14
	%	42.8	14.3	14.3	14.3	14.3	100
5. 65 and over years	No	4	3	0	0	1	8
	%	50.0	37.5	0	0	12.5	100
Total response of each level of importance		**66**	**61**	**119**	**53**	**19**	**318**
*Educational Groups (*2)*							
1. Elementary	No	3	7	3	0	2	5
	%	20	46.7	20	0	13.3	100
2. Secondary	No	38	23	59	19	8	147
	%	25.9	15.6	40.1	12.9	5.4	100
3. University	No	21	21	44	26	7	119
	%	17.6	17.6	37.0	21.8	5.9	100
4. Post graduate	No	2	8	12	6	2	30
	%	6.7	26.7	40.0	20.0	6.7	100
Total response of each level of importance		**64**	**59**	**118**	**51**	**19**	**318**

1. Chi-Square 34.4839 Significant at $p < 0.05$.
2 Chi-Square 22.1437 Significant at $p < 0.05$.

The Relationship Between the Importance of 'Good Weather' and Demographic Differences

As can be seen from Table 7.12, there is a clear relationship between gender and good weather as an important reason for the respondents' visit to Turkey, with demographic differences of the British tourists. The table shows that males were more concerned with weather than females.

TABLE 7.11 The Importance of 'Visit Historic Places' by Demographic Differences

Demographic Differences		*Not important*	*Limited important*	*Average*	*Very important*	*Essential*	*Total each group*
*Age Groups (*1)*							
1. Under 25 years	No	23	18	24	14	6	85
	%	27.1	21.2	28.2	16.5	7.1	100
2. 25-34 years	No	13	23	26	28	12	102
	%	12.7	22.5	25.5	27.5	11.8	100
3. 35-44 years	No	8	7	12	17	10	54
	%	14.8	13.0	22.2	31.5	18.5	100
4. 45-54 years	No	4	7	13	20	25	69
	%	5.8	10.1	18.8	29.0	36.3	100
5. 55-64 years	No	1	0	3	4	9	17
	%	5.9	0	17.7	23.5	52.9	100
5. 65 and over years	No	0	0	4	2	3	9
	%	0	0	44.5	22.2	33.3	100
Total response of each level of importance		**49**	**55**	**82**	**85**	**65**	**336**
*Marital Status (*2)*							
1. Single	No	28	29	40	29	19	145
	%	19.3	20.0	27.6	20.0	13.1	100
2. Married	No	18	23	39	51	42	173
	%	10.4	13.3	22.5	29.5	24.3	100
3.Widowed/divorced	No	3	3	2	5	4	17
	%	17.6	17.6	11.8	29.4	23.5	100
Total response of each level of importance		**49**	**55**	**81**	**85**	**65**	**335**

1. Chi-Square 63.0775 Significant at $p < 0.001$.
2 Chi-Square 16.6792 Significant at $p < 0.05$.

TABLE 7.12 The Importance of 'Good Weather' by Demographic Differences

Demographic Differences		*Not important*	*Limited important*	*Average*	*Very important*	*Essential*	*Total each group*
Gender (*)							
1. Male	No	3	2	8	34	119	166
	%	1.8	1.2	4.8	20.5	71.7	100
2. Female	No	0	0	17	23	131	171
	%	0	0	9.9	13.5	76.6	100
Total response of each level of importance		**3**	**2**	**25**	**57**	**250**	**337**

**** Chi-Square 10.8670 Significant at $p < 0.05$.***

The Relationship Between the Importance of 'Adventure' and Demographic Differences

Table 7.13 portrays significant relationships between adventure as an important motivation for the British tourists' visit to Turkey, with age groups and marital status. From the Table it can be observed that the younger age group (under 35 years) was much more interested in adventure activities than other age groups, especially the oldest age group (over 65 years). Additionally, those who were widowed or divorced people were more concerned with adventure than single and married people.

TABLE 7.13 The Importance of 'Adventure' by Demographic Differences

Demographic Differences*		*Not important*	*Limited important*	*Average*	*Very important*	*Essential*	*Total each group*
*Age Groups (*1)*							
1. Under 25 years	No	12	12	24	18	19	85
	%	14.1	14.1	28.2	21.2	22.4	100
2. 25-34 years	No	9	13	35	33	10	100
	%	9.0	13.0	35.0	33.0	10.0	100
3. 35-44 years	No	11	9	10	15	8	53
	%	20.8	17.0	18.8	28.3	15.1	100
4. 45-54 years	No	17	11	18	11	8	65
	%	26.2	16.9	27.7	16.9	12.3	100
5. 55-64 years	No	1	4	3	2	3	13
	%	7.7	30.7	23.1	15.4	23.1	100
5. 65 and over years	No	3	4	0	1	0	8
	%	37.5	50.0	0	12.5	0	100
Total response of each level of importance		**53**	**53**	**90**	**80**	**48**	**324**
*Marital Status (*2)*							
1. Single	No	19	18	47	36	25	145
	%	13.1	12.4	32.4	24.8	17.2	100
2. Married	No	32	34	39	39	18	162
	%	19.8	21.0	24.1	24.1	11.1	100
3. Widowed/Divorced	No	2	0	4	5	5	16
	%	12.5	0	25.0	31.3	31.3	100
Total response of each level of importance		**53**	**52**	**90**	**80**	**48**	**323**

1. Chi-Square 37.5932 Significant at $p < 0.001$.
2 Chi-Square 15.6627 Significant at $p < 0.05$.

The Relationship Between the Expectation of Meeting 'Warm, Friendly People' and Demographic Differences

The findings of Table 7.14 show that very clear relationships exist between the different age, gender and marital status, and the importance of the expectation of meeting friendly people in Turkey as a reason for the British tourists' visit to the country. However, the other demographic dimensions -educational and income groups, and employment status-, appeared not to be related.

TABLE 7.14 The Importance of 'Warm, friendly people' by Demographic Differences

Demographic Differences		*Not important*	*Limited important*	*Average*	*Very important*	*Essential*	*Total each group*
*Age Groups (*1)*							
1. Under 25 years	No	3	3	19	25	35	85
	%	3.5	3.5	22.4	29.4	41.2	100
2. 25-34 years	No	0	1	25	38	38	102
	%	0	1.0	24.5	37.3	37.3	100
3. 35-44 years	No	3	2	3	17	29	54
	%	5.6	3.7	5.6	31.4	53.7	100
4. 45-54 years	No	1	2	5	28	32	68
	%	1.5	2.9	7.4	41.1	47.1	100
5. 55-64 years	No	0	1	1	4	12	18
	%	0	5.6	5.6	22.2	66.6	100
5. 65 and over years	No	0	0	1	2	6	9
	%	0	0	11.1	22.2	66.7	100
Total response of each level of importance		**7**	**9**	**54**	**114**	**152**	**336**
*Gender (*2)*							
1. Male	No	5	6	26	67	61	165
	%	3.0	3.6	15.8	40.6	37.0	100
2. Female	No	2	3	28	47	91	171
	%	1.2	1.8	16.4	27.5	53.2	100
Total response of each level of importance		**7**	**9**	**54**	**114**	**152**	**336**
*Marital Status (*3)*							
1. Single	No	4	3	33	50	57	147
	%	2.7	2.0	22.4	34.0	38.8	100
2. Married	No	3	6	20	62	80	171
	%	1.8	3.5	11.7	36.3	46.8	100
3.Widowed/divorced	No	0	0	1	2	14	17
	%	0	0	5.9	11.8	82.4	100
Total response of each level of importance		**7**	**9**	**54**	**114**	**151**	**335**

1. Chi-Square 32.5322 Significant at $p < 0.05$. *2 Chi-Square 11.6862 Significant at $p < 0.05$.
****3 Chi-Square 18.0493 Significant at $p < 0.05$.***

The findings also show that over 45 year old people and married people were much more concerned with meeting friendly people in Turkey than other groups.

The Relationship Between the Importance of 'Feeling of Personal Security' and Demographic Differences

Table 7.15 displays that there are very clear relationships between age group, gender, educational groups and the importance of the expectation of feeling of personal security in Turkey as a reason for the British tourists' visit to the country. On the other hand the other demographic classification were statistically independent.

The Table also shows that the oldest age group -65 and over years- was most concerned with their security in Turkey (100 per cent as very important and essential), while the youngest age group -under 25 years- was least concern. Moreover, females were much more concerned than male with their safety.

The Relationship Between the Importance of 'Comfortable Accommodation' and Demographic Differences

Apart from age groups, all other demographic dimensions appeared to be statistically not related to finding comfortable accommodation in Turkey, as an important reason for respondents' visiting the country. It can be seen from the findings that the oldest age group (65 and over years) was the most concerned with comfortable accommodation, which indeed, they may need much more than other younger group (See Table 7.16).

TABLE 7.15 The Importance of 'Feeling of Personal Security' by Demographic Differences

Demographic Differences		Not important	Limited important	Average	Very important	Essential	Total each group
*Age Groups (*1)*							
1. Under 25 years	No	8	10	15	26	23	82
	%	9.8	12.2	18.3	31.7	28.0	100
2. 25-34 years	No	3	6	30	35	27	101
	%	3.0	5.9	29.7	34.7	26.7	100
3. 35-44 years	No	3	1	12	13	25	54
	%	5.5	1.9	22.2	24.1	46.3	100
4. 45-54 years	No	1	3	11	20	33	68
	%	1.5	4.4	16.2	29.4	48.5	100
5. 55-64 years	No	0	1	3	8	6	18
	%	0	5.6	16.7	44.4	33.3	100
5. 65 and over years	No	0	0	0	5	4	9
	%	0	0	0	55.6	44.4	100
Total response of each level of importance		**15**	**21**	**71**	**107**	**118**	**332**
*Gender (*2)*							
1. Male	No	10	15	40	53	45	163
	%	6.1	9.2	24.5	32.5	27.6	100
2. Female	No	5	6	31	54	73	169
	%	3.0	3.6	18.3	32.0	43.2	100
Total response of each level of importance		**15**	**21**	**71**	**107**	**118**	**332**
*Educational Groups (*3)*							
1. Elementary	No	0	3	2	6	9	20
	%	0	15.0	10.0	30.0	45.0	100
2. Secondary	No	4	6	33	39	70	152
	%	2.6	3.9	21.7	25.7	46.1	100
3. University	No	6	9	28	50	27	120
	%	5.0	7.5	23.3	41.7	22.5	100
4. Post graduate	No	5	3	7	11	5	31
	%	16.1	9.7	22.6	35.5	16.1	100
Total response of each level of importance		**15**	**21**	**70**	**106**	**111**	**323**

1. Chi-Square 34.6026 Significant at p< 0.05. *2 Chi-Square 13.2139 Significant at p < 0.05. *3 Chi-Square 36.8951 Significant at p < 0.001.

The Relationship Between the Importance of 'To Take a Bargain Priced Vacation' and Demographic Differences

The data in Table 7.17 shows that there are relationships between bargain priced vacation and income groups, as a reason or motivation to respondents to visit

Turkey. The Table also shows that the richest group of respondents were more concerned with the reason in question than other income groups.

TABLE 7.16 The Importance of 'Comfortable Accommodation' by Demographic Differences

Demographic Differences *Age Groups (*)*		*Not important*	*Limited important*	*Average*	*Very important*	*Essential*	*Total each group*
1. Under 25 years	No	2	7	20	30	26	85
	%	2.4	8.2	23.5	35.3	30.6	100
2. 25-34 years	No	3	12	34	27	26	102
	%	2.9	11.8	33.3	26.5	25.5	100
3. 35-44 years	No	1	2	21	13	18	55
	%	1.8	3.6	38.2	23.6	32.8	100
4. 45-54 years	No	1	2	11	22	31	67
	%	1.5	3.0	16.4	32.8	46.3	100
5. 55-64 years	No	2	0	2	1	12	17
	%	11.8	0	11.8	5.9	70.5	100
5. 65 and over years	No	0	1	1	6	2	10
	%	0	10.0	10.0	60.0	20.0	100
Total response of each level of importance		**9**	**24**	**89**	**99**	**115**	**336**

**** Chi-Square 44.2609 Significant at p < 0.001.***

TABLE 7.17 The Importance of 'To takea bargain priced vacation' by Demographic Differences

Demographic Differences *Income Groups (*)*		*Not important*	*Limited important*	*Average*	*Very important*	*Essential*	*Total each group*
1. Under £ 10,000	No	5	6	4	3	9	27
	%	18.5	22.2	14.8	11.1	33.3	100
2. £10,000-£19,999	No	5	14	20	18	24	81
	%	6.2	17.3	24.7	22.2	29.6	100
3. £20,000-£29,999	No	5	13	33	33	20	104
	%	4.8	12.5	31.7	31.7	19.2	100
4. £30,000-£39,999	No	4	5	7	12	23	51
	%	7.8	9.8	13.7	23.5	45.1	100
5. £40,000-£49,999	No	2	3	4	6	3	18
	%	11.1	16.7	22.2	33.3	16.7	100
6. £50,000 and over	No	1	3	2	9	5	20
	%	5.0	15.0	10.0	45.0	25.0	100
Total response of each level of importance		**22**	**44**	**70**	**81**	**84**	**301**

**** Chi-Square: 32.9037. Significant at p < 0.05.***

The Relationship Between the Importance of 'To Go to a Newly Fashionable Destination' and Demographic Differences

TABLE 7.18 The Importance of 'To go to a newly fashionable destination' by Demographic Differences

Demographic Differences		Not important	Limited important	Average	Very important	Essential	Total each group
*Age Groups (*1)*							
1. Under 25 years	No	23	16	22	17	7	85
	%	27.1	18.8	25.9	20.0	8.2	100
2. 25-34 years	No	20	23	30	17	9	99
	%	20.2	23.2	30.3	17.2	9.1	100
3. 35-44 years	No	24	10	5	11	5	55
	%	43.6	18.2	9.1	20.0	9.1	100
4. 45-54 years	No	29	11	11	7	5	63
	%	46.0	17.5	17.5	11.1	7.9	100
5. 55-64 years	No	4	2	4	2	3	15
	%	26.7	13.3	26.7	13.3	20.0	100
5. 65 and over years	No	55	1	0	0	2	8
	%	62.5	12.5	0	0	25.0	100
Total response of each level of importance		**105**	**63**	**72**	**54**	**31**	**325**
*Marital Status(*2)*							
1. Single	No	33	31	43	28	10	145
	%	22.8	21.4	29.7	19.3	6.9	100
2. Married	No	68	29	26	23	17	163
	%	41.7	17.8	16.0	14.1	10.4	100
3.Widowed/divorced	No	3	3	3	3	4	16
	%	18.8	18.8	18.8	18.8	25.0	100
Total response of each level of importance		**104**	**63**	**72**	**54**	**31**	**324**
*Educational Groups (*3)*							
1. Elementary	No	3	1	2	4	5	15
	%	20.0	6.7	13.3	26.7	33.3	100
2. Secondary	No	45	35	36	21	14	151
	%	29.8	23.2	23.8	13.9	9.3	100
3. University	No	39	21	31	20	9	120
	%	32.5	17.5	25.8	16.7	7.5	100
4. Post graduate	No	14	6	2	6	2	30
	%	46.7	20.0	6.7	20.0	6.7	100
Total response of each level of importance		**101**	**63**	**71**	**51**	**30**	**316**

1. Chi-Square 35.8006 Significant at $p < 0.05$.
2 Chi-Square 23.0955 Significant at $p < 0.001$.
3 Chi-Square 21.5696 Significant at $p < 0.05$.

With the exception of gender and income groups, Table 7.18 portrays significant relationships between the importance of to go to Turkey as a newly fashionable destination with all other demographic differences. The importance of the reason in question had similar views in each group.

The Relationship Between the Importance of 'Clean Beaches' and Demographic Differences

The data in Table 7.19 indicates clear relationships between expectation of findings clean beaches in Turkey as an important reason for the British tourists' visits to the country with educational groups only, while other demographic dimensions were not related. The data also shows that all respondent in this group had nearly similar views except the post graduate group of respondents who were less concerned with the reason in question. The reason for this may be that this group were interested in other types of vacation.

TABLE 7.19 The Importance of 'Clean beaches' by Demographic Differences

Demographic Differences *Educational Groups (*)*		*Not important*	*Limited important*	*Average*	*Very important*	*Essential*	*Total each group*
1. Elementary	No	0	1	4	3	11	19
	%	0	5.3	21.1	15.8	57.9	100
2. Secondary	No	2	7	25	51	71	156
	%	1.3	4.5	16.0	32.7	45.5	100
3. University	No	5	7	17	49	44	122
	%	4.1	5.7	13.9	40.2	36.1	100
4. Post graduate	No	6	4	3	11	7	31
	%	19.4	12.9	9.7	35.5	22.6	100
Total response of each level of importance		**13**	**19**	**49**	**114**	**133**	**328**

**** Chi-Square: 35.1673. Significant at p <.001.***

The Relationship Between the Importance of 'Range of Water Sports' and Demographic Differences

From the Table 7.20, it can be seen clearly that there is a relationship between the importance of finding good range of water sports in Turkey with age groups. Respondents of the young age group (under 25 years) were more concerned with the availability of water sports facilities than other age groups, as a reason for their visit to the country.

TABLE 7.20 The Importance of 'Range of water sports' by Demographic Differences

Demographic Differences Age Groups (*)		Not important	Limited important	Average	Very important	Essential	Total each group
1. Under 25 years	No	13	8	21	22	21	85
	%	15.3	9.4	24.7	25.9	24.7	100
2. 25-34 years	No	23	20	24	22	12	101
	%	22.8	19.8	23.7	21.8	11.9	100
3. 35-44 years	No	13	11	15	8	8	55
	%	23.7	20.0	27.3	14.5	14.5	100
4. 45-54 years	No	22	13	13	11	7	66
	%	33.3	19.7	19.7	16.7	10.6	100
5. 55-64 years	No	7	2	1	3	3	16
	%	43.8	12.5	6.3	18.7	18.7	100
5. 65 and over years	No	5	2	0	0	1	8
	%	62.5	25.0	0	0	12.5	100
Total response of each level of importance		**83**	**56**	**74**	**66**	**52**	**331**

***** *Chi-Square 32.2198 Significant at* $p < 0.05$.

The Relationship Between the Importance of 'Suitable for Family Vacation' and Demographic Differences

Table 7.21 shows very significant relationships between the importance of finding suitable family vacation in Turkey with age and educational groups, and marital status. The middle (35-54 years) and specially oldest age groups (65 and over years) were more concerned with suitable family vacation in Turkey than younger age groups. This might be that the number of married people in this group are larger than those young age groups. In fact, findings in the Table present that married people (48.8 per cent very important or essential) were more concerned than single people (22.2 per cent very important or essential).

TABLE 7.21 The Importance of 'Suitable for family vacation' by Demographic Differences

Demographic Differences		*Not important*	*Limited important*	*Average*	*Very important*	*Essential*	*Total each group*
*Age Groups (*1)*							
1. Under 25 years	No	42	12	8	10	10	82
	%	51.2	14.6	9.8	12.2	12.2	100
2. 25-34 years	No	45	18	22	11	6	102
	%	44.1	17.6	21.6	10.8	5.9	100
3. 35-44 years	No	15	3	5	11	21	55
	%	27.3	5.5	9.1	20.0	38.1	100
4. 45-54 years	No	17	9	5	15	21	67
	%	25.4	13.4	7.5	22.4	31.3	100
5. 55-64 years	No	3	2	2	6	5	18
	%	16.7	11.1	11.1	33.3	27.8	100
5. 65 and over years	No	1	0	2	4	3	10
	%	10.0	0	20.0	40.0	30.0	100
Total response of each level of importance		**123**	**44**	**44**	**57**	**66**	**334**
*Marital Status(*2)*							
1. Single	No	71	20	21	18	14	144
	%	49.3	13.9	14.6	12.5	9.7	100
2. Married	No	45	22	21	36	48	172
	%	26.2	12.8	12.2	20.9	27.9	100
3.Widowed/divorced	No	7	2	2	2	4	17
	%	41.2	11.8	11.8	11.8	23.5	100
Total response of each level of importance		**123**	**44**	**44**	**56**	**66**	**333**
*Educational Groups (*3)*							
1. Elementary	No	2	5	2	4	6	19
	%	10.5	26.3	10.5	21.1	31.6	100
2. Secondary	No	44	18	24	31	37	154
	%	28.6	11.7	15.6	20.1	24.0	100
3. University	No	58	18	13	15	17	121
	%	47.9	14.9	10.7	12.5	14.0	100
4. Post graduate	No	16	2	5	4	4	31
	%	51.6	6.5	16.1	12.9	12.9	100
Total response of each level of importance		**120**	**43**	**44**	**54**	**64**	**325**

1. Chi-Square 66.4626 Significant at p < 0.001. *2 Chi-Square 28.7010 Significant at p < 0.001. *3 Chi-Square 26.2318 Significant at p < 0.001.

It is important to note that other variables that were statistically independent are: plenty to do and see in Turkey and enjoying a different taste and cuisine. There were no significant relationships between the factors in determining interest for visiting Turkey and demographic differences of the visitors. However, they were all considered important by the respondents in leading them to be interested in taking a holiday in Turkey.

Relationship Between the Importance of Motivation with the Type of Tourists

In order to determine if there is any relationships between the reasons and expectations considered of importance for the British tourists' visit to Turkey with the type of tourists, fourteen tests matching each motivational factor with the two groups (package/group and the independent tourists) were undertaken. For this purpose the statistical measure of goodness-of-fit test of significance (Chi-square) was used.

The procedure found that there is no significant relationship between them at 95% and 99% levels of confidence.

Comparison of Reasons and Expectation for Travelling Turkey with First and Subsequent Visitors

In order to determine first time and subsequent visitors' image and expectations, both groups' means were compared. A breakdown of the results is shown in Table 7.22 that first time and subsequent visitors had very similar reasons and expectations for travelling Turkey.

Drawing upon the whole findings of reasons and expectations considered by the British tourists' visit to Turkey, it can be conclude that the image of the country as a possible tourist destination is entirely based on its good weather and clean beaches. Therefore, hypothesis three is supported.

In the following, sources of information that led British tourists to visit Turkey will be investigated.

TABLE 7.22 Comparison of Reasons and Expectation for Travelling Turkey with First and Subsequent Visits

CRITERIA (REASONS AND EXPECTATIONS)	First Visits		Subsequent Visits	
	Mean*	**n**	**Mean***	**n**
1. Good weather	4.6553	235	4.5686	102
2. Warm, friendly people	4.0513	234	4.4608	102
3. Plenty to do and see	4.0298	235	4.1485	101
4. Clean beaches	4.0043	234	4.0971	103
5. Comfortable accommodation	3.8255	235	3.9208	101
6. Feeling of personal security	3.8000	230	4.0588	102
7. Take a bargain priced vacation	3.4807	233	3.4752	101
8. To enjoy a different cuisine	3.4619	236	3.6634	101
9. Visit historic places	3.0979	235	3.3862	101
10. Adventure	3.0830	229	2.9789	95
11. Range of water sports	2.8970	233	2.7143	98
12. Simple for reasons of curiosity	2.8243	222	2.3438	96
13. To go a newly fashionable destination	2.6140	228	2.2887	97
14. Suitable for family vacation	2.5905	232	2.9412	102

Source: Field Research

* The higher the mean value, the more important the reason was considered by the British tourists.

Sources of Information which Influenced the British Tourists to Visit Turkey

Respondents were asked to connote what source(s) of information influenced them to visit the country. Seven sources were suggested to them by the questionnaire, and the opportunity to add others was given. Table 7.23 displays the sources of information that led tourists to be interested in visiting Turkey. Recommendations from travel agencies received the highest response with 74.3 per cent.

Moreover, recommendations of friends and relatives were the second factor contributing to the arrivals of British tourists in Turkey, where 44.5 per cent of them reported that such considerations encouraged them to travel to the country for the purpose of tourism. Travel articles featuring in newspapers/travel magazines (27.4%) seemed to create better impact in stimulating the interest to visit Turkey than previous experiences (23.6%), radio/TV advertising (21.5%), published sources such as guidebooks (20.9%).

As can be inferred from Table 7.23, only 15.6 per cent of respondents indicated that they received tourist literature from the Turkish Information Office in London. Thus promotional activities carried out by Turkish Information Office in London seemed to have little effect in this regard.

As a concluding note, it might be suggested that efficient promotional programmes should be developed by Turkish tourism organisations in order to support the initial motives of the British traveller to Turkey. Generating a favourable image and desire to visit Turkey should be the responsibility of the Turkish tourism organisations.

TABLE 7.23 The Sources of Information that Led Tourists to be Interested in Visiting Turkey.

SOURCES OF INFORMATION	Frequency	Percent	Rank
A. Travel agencies	252	74.3	1
B. Recommended by friends and relatives	151	44.5	2
C. Newspapers/travel magazine	93	27.4	3
D. Previous experience	80	23.6	4
E. Radio/TV advertising	73	21.5	5
F. Published sources (e.g. guidebooks)	71	20.9	6
G. Turkish Information Office in London	53	15.6	7

Number of total valid response = 339
Responses exceed 100% due to multiple response.
Source: Field Research

The Relationship Between Sources of Information Influencing Tourists to Visit Turkey and the Type of Tourists

To examine how the two types of tourists (groups and independent) considered, the sources of information which influenced them in visiting Turkey, the statistical measure of goodness-of-fit test of significance (Chi-square) was used. The procedure found two factors to have a significant relationship in guiding the interest of the two types of tourists. The relationships were significant at the 95% level of confidence.

TABLE 7. 24 The Influence of Newspaper travel magazine Articles and the Types of Tourist

TYPE OF TOURISTS	YES		NO	
	No	%	No	%
GROUP (Packaged)	56	23.9	178	76.1
INDEPENDENT	37	35.2	68	64.8

Chi-Square 4.6541. Significant at $p < .05$.

Reading newspapers and magazines articles were considered to be more important to the independent tourists (35.2 per cent) than to the group tourists (23.9 per cent) as an influencing factor that led them to be interested in taking a holiday to Turkey (Refer to Table 7.24).

TABLE 7.25 The Influence of Radio TV Advertisements and the Type of Tourist

TYPE OF TOURISTS	YES		NO	
	No	%	No	%
GROUP (Packaged)	43	18.4	191	81.6
INDEPENDENT	30	28.6	75	71.4

Chi-Square 4.4458. Significant at $p < .05$.

Table 7.25 states that independent tourists (28.6 per cent) felt that radio and/or TV advertisements were more influential to them than the group tourists (18.4%). Consequently, independent tourists found that reading newspapers and magazines articles and advertisements on radio and TV to be more influential in leading them to take a holiday to Turkey than group (packaged) holidaymakers.

In the following section, the British tourists' opinions on sources of information which helped them while in Turkey to visit attractions or to use facilities, will be explored.

Tourists' Opinions on Sources of Information Which Helped Them While in Turkey to Visit the Attractions or to Use the Facilities

Participants were requested to indicate the source of information that help them while in Turkey to visit attractions or to use facilities. Therefore, six sources of information were proposed to them by the questionnaire. Moreover, they were also requested to add any others not included. A five-point Likert type scale ranging from 'very poor ' to 'excellent' was used. Furthermore, a separate column of 'do not know' was attached to the scale so as to assess more efficiently the extent of helpfulness of each source of information to the British tourists.

British tourists' views on these sources of information are ranked according to the mean value and demonstrated in Table 7.26. The higher the mean, the more helpful the source of information was regarded by the participants.

As can be inferred from Table 7.26 that participants were satisfied with all the sources of information since their scores on the columns four and five -good, excellent help- overweighed those of columns one and two - very poor, poor help-. This results show that the previous experience of the British tourists; recommendation of friends and relatives; and representative of British tour operators/travel agencies were the three most important helpful sources of

TABLE 7.26 Tourist's Satisfaction With Local Source of Information

SOURCES OF INFORMATION	*Very poor help*		*Poor help*		*Satisfac-tory*		*Good help*		*Excellent help*		*Do not know*		*Total*	*Mean Value*
	n	%	*n*	%	*n*	%	*n*	%	*n*	%	*n*	%	*n*	*
1. Own experience	4	1.3	2	0.6	26	8.1	30	9.4	36	11.3	221	69.3	319	3.939
2. Recommendation of friends/relat.	9	2.8	6	1.9	70	21.9	61	19.1	43	13.4	131	40.9	320	3.651
3. Rep. of British tour operators, ...	19	5.9	22	6.9	65	20.3	60	18.8	59	18.4	95	29.7	320	3.524
4. Local travel agencies	10	3.1	22	6.9	68	21.2	60	18.8	37	11.6	123	38.4	320	3.467
5. Local tourist information centres	29	9.1	22	6.9	29	9.1	35	10.9	21	6.5	184	57.5	320	2.978
6. Hotel staff	29	9.1	15	4.7	33	10.3	34	10.6	18	5.6	191	59.7	320	2.977

Number of total valid response = 339

Source: Field Research

* The higher the mean value, the more helpful the source of information was regarded by the participants.

information in enabling the British tourists to visit the tourist attractions, and/or to use the tourist services and facilities while in Turkey. In addition to the above sources of information some respondents indicated that guide books and local people informed visitors while in the country.

In the following section, another important area of research will be examined. That is the ways by which British tourists arranged their visits to Turkey.

Travel Arrangements of the British Tourists to Turkey

In terms of travel arrangements, Table 7.27 reveals that travel agents played a major role by handling the booking of 54.9 per cent of the package holiday and 26.8 per cent of the independent holidaymakers. This may derive from the fact that travel agents offer personalised services that gave the consumer much more confidence in making the right choice of destination.

Direct booking with the tour operator only accounted 14.2 per cent of all the holidays to Turkey. *Independent holiday sold by the airlines only attracted 4.1 per* cent of the respondents.

These findings point to the comments that the role of travel agent seems to have a dominant role in these arrangements where a big majority (81.7%) of the respondents used travel agents' services. Based on this finding, it can be further commented that the package tour dominated the pattern of travel from Britain to Turkey, where nearly 70 per cent of respondents organised their visits according to this form.

Moreover, Table 7.28 below shows that the majority (51.6%) of the sample travelled with a partner; and 19.2% travelled with their friends. It can be also deduced from the Table that only 4.7 per cent travelled alone.

TABLE 7.27 Travel Arrangements of the British Tourists' Visit to Turkey

Value Label	Frequency	Percent	Valid Percent	Cum Percent
Pack. holiday booked through travel agent	186	54.9	54.9	54.9
Pack. holiday booked direct from tour operator	48	14.2	14.2	69.0
Indep. holiday booked through travel agent	91	26.8	26.8	95.9
Independent holiday from airline	14	4.1	4.1	100.0
Total	339	100.0	100.0	

Valid cases 339 Missing cases 0

TABLE 7.28 Personal Travel Arrangements of the British Tourists' Visit to Turkey

Value Label	Frequency	Percent	Valid Percent	Cum Percent
Alone	16	4.7	4.7	4.7
Partner	175	51.6	51.6	56.3
Partner and children	52	15.3	15.3	71.6
Other family member	24	7.1	7.1	78.7
Friends	65	19.2	19.2	97.9
Tour group	7	2.1	2.1	100.0
Total	339	100.0	100.0	

Valid cases 339 Missing cases 0

In the following, an attempt will be made to determine the relationships, if any, between types of visit arrangement and demographic differences.

Relationship Between the Type of Tourists and Demographic Differences

With the purpose of determining the relationships, if any, between types of visit arrangement and demographic differences, the statistical measure of goodness-of-fit test of significance (Chi-square) was used between them. The procedure found a significant relationship between the use of different types of visit arrangement and age groups and employment status only. The relationships were significant at the 95% level of confidence.

TABLE 7.29 Ways of Visit Arrangement by Age Groups

Demographic Differences *Age Groups (*)*		*Group (packaged) tourists*	*Independent tourists*	*Total each group*
1. Under 25 years	No	61	24	85
	%	71.8	28.2	100
2. 25-34 years	No	74	28	102
	%	72.6	27.4	100
3. 35-44 years	No	41	14	55
	%	74.6	25.4	100
4. 45-54 years	No	46	23	69
	%	66.7	33.3	100
5. 55-64 years	No	7	11	18
	%	38.9	61.1	100
6. 65 and over years	No	5	5	10
	%	50	50	100
Total each group		**234**	**105**	**339**

**** Chi-Square: 11.1934. Significant at p <.05.***

TABLE 7.30 Ways of Visit Arrangement by Employment Status

Demographic Differences *Employment Status (*)*		*Group (packaged) tourists*	*Independent tourists*	*Total each group*
1. Professional	No	56	25	81
	%	69.1	30.9	100
2. Management	No	43	13	56
	%	76.8	23.2	100
3. Self-employed	No	14	9	23
	%	60.9	31.9	100
4. Manual worker	No	36	9	45
	%	80.0	20.0	100
5. Office worker	No	46	22	68
	%	67.6	32.4	100
6. Retired	No	6	12	18
	%	33.3	66.7	100
7. Unemployed	No	5	1	6
	%	83.3	16.7	100
8. House-wife	No	5	4	9
	%	56.4	44.4	100
9. Student	No	20	9	29
	%	69.0	31.0	100
Total each group		**231**	**104**	**335**

**** Chi-Square: 16.9303. Significant at p <.05.***

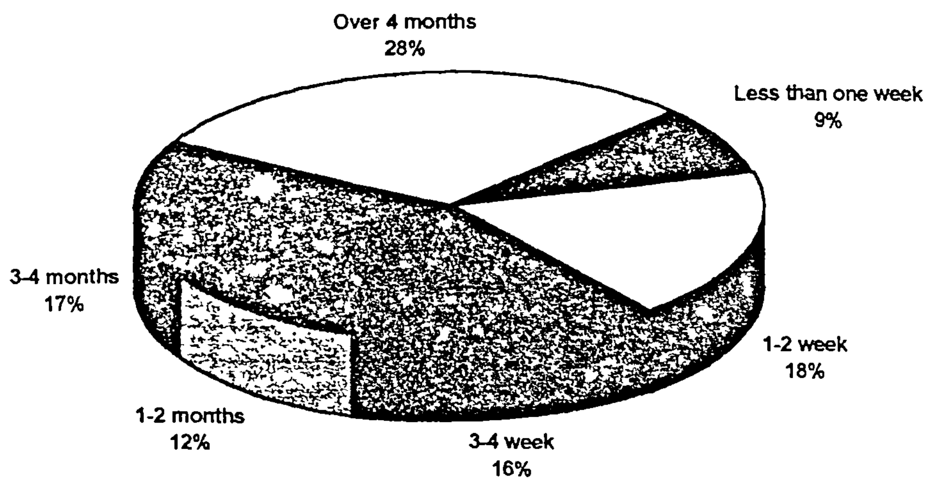
From Table 7.29 it appears that young and middle age groups preferred to arrange their trip to Turkey as a group (package) traveller, while old age groups (55-64 years) preferred to travel independently.

With regard to employment status, with the exception of retired people other professions preferred to travel as a group rather than independently (Refer to Table 7.30).

Booking Patterns of the British Tourists to Turkey

Figure 7.2 presents the distribution of holiday booking patterns of the British tourists to Turkey. As can be seen from the Figure nearly half of the bookings of the travellers were made one month prior to their vacation. While 29 per cent of the sample booked their holidays during the period of 1-4 months. The Figure also shows that 28 per cent of the tourists booked their holidays at least 4 months ahead of departure time.

FIGURE 7.2 Booking Patterns of the British Tourists to Turkey



As previously argued in Chapter four, the effectiveness of advertising, advertising efforts and activities should be directed to the early stages of the consumer's decision-making process. This will gain the attention of the prospective visitor, hold that attention when the message can be communicated, and make a long time positive impression on the potential consumer mind. Furthermore, as advertising is one of the most expensive activities, it is the main task of the Ministry of Tourism to choose the right media and time for advertising in order to reach the British market.

Relationship Between the Type of Tourists and the Booking Patterns

In order to examine the relationship, if any, between the type of travellers and the booking pattern of the British tourists to Turkey, a cross-tabulation analysis was carried out. The statistical measure of goodness-of-fit test of significance (Chi-square) was used between them.

The procedure found that there was no significant relationship between the type of travellers and the booking pattern of the respondents at the 95% and 99% level of confidence.

British Tourists' Use of Airlines for Travel to Turkey

The British tourists were asked to identify the airline they used for travelling Turkey, and the criteria they used in choosing the airlines. From Table 7.31, it can be seen clearly that charter flights by tour operators have a superior position in the air travel market from the UK to Turkey. As the findings indicate, 56.7 per cent of respondents indicated the use of such airlines. Next came British Airways with 38.9% followed by Turkish Airline with only 4.4 per cent.

From the findings of Table 7.31., the following comments can be drawn; the British tourists extensively used inclusive tour excursion fares which were made available to them by tour operators. This reflected the mass tourism destinations to which the majority of air tour passengers were carried on charter flights.

The share of Turkish Airline was small compared to British Airways. It may reasonably be supposed that these results are so because the survey was carried out during the summer time, between June and August when the majority of respondents used charter flights provided by tour operators.

TABLE 7.31 British Tourists' Use of Airlines for Travel to Turkey

AIRLINE USED	*Frequency*	*Percent*	*Rank*
A. Charter Flights	192	56.7	1
B. British Airways	132	38.9	2
C. Turkish Airline	15	4.4	3

Number of total valid response = 339
Source: Field Research

Respondents were then asked to indicate the criteria they used in choosing the airlines. Seven criteria were suggested to them by the questionnaire and they were also requested to add any others not included. The answers received are ranked in order according to the frequency of mention and showed in Table 7.32.

As can be observed that the majority of British tourists (67.6%) purchased inclusive package tours and therefore they did not choose the airline personally. This result is supports the conclusion derived from the previous Table (7.31) that the inclusive package tours dominated the pattern of travel from the UK to Turkey.

The recommendation of travel agent and of friends and relatives come second and third where 29.8% and 24.2% of the respondents respectively, indicated that their choice of airline was based upon these recommendations.

The next two criteria - offer special discounts and previous experience - were considered to have similar influence on the respondents' choice of airlines, while the last two criteria seem to be of less important in this regard.

TABLE 7.32 British Tourists' Airlines Choice Criteria

AIRLINES CHOICE CRITERIA	*Frequency*	*Percent*	*Rank*
A. Part of inclusive tour (did not choose personally)	229	67.6	1
B. Recommended by travel agent	101	29.8	2
C. Recommended by friends and relatives	82	24.2	3
D. Offer special discounts	66	19.5	4
E. Previous experience	52	15.3	5
F. Attracted by advertisements	28	8.3	6
G. To support national airlines	11	3.2	7

Number of total valid response = 339
Responses exceed 100% due to multiple response.
Source: Field Research

From the above analysis of visit arrangements, it can be understood that inclusive package tours produced by tour operators and sold either by themselves or by travel agents to either individuals or groups, dominated the model of travel from the UK to Turkey. Hence, tourists did not choose airlines personally.

One main conclusion to be derived from the whole analysis in this section, that is Turkey was mainly viewed by the British tourists as a country which has good weather and clean beaches; the image of country was a sun, sea and sand destination. The majority of respondents were encouraged to visit the country by travel agencies and recommendation of friends and relatives. Furthermore, their visits to Turkey were mainly arranged by the British travel trade in the form of package tours. The following summary of the findings support the above conclusion.

Firstly, for both first time and repeat visitors to Turkey, the image of the country was entirely based on its good weather and clean beaches. Respondents also expected to meet friendly people; anticipated things to do and see there; and expected to find clean beaches and comfortable accommodation and to feel secure while in Turkey.

However, availability of a range of water sports, suitable for family vacation, curiosity, and to visit a newly fashionable destination seemed to be of no importance for the British tourists.

Secondly, attitudes of the tourists towards Turkey as a tourist destination and their decisions to visit the country was mainly influenced by the British travel agencies and recommendation of friends and relatives. In this respect, the contribution of the British travel trade appeared to have big effect.

Thirdly, the British travel trade seemed to have a leading position in arranging and selling visits and travel to Turkey. These visits were mainly dominated by the form of inclusive package tour that was produced by tour operators and sold either by themselves or by travel agents to either individuals or groups.

Finally, the national carrier, Turkish Airlines appeared to have a weak position in the air travel market from the UK to Turkey, as most travellers bought inclusive package tours that included the airline on which they flew.

The above findings show that the marketing activities of the British travel trade did contribute to the decision of British tourists to visit Turkey. In fact, the main aim of marketing activities carried out by Turkish tourism bodies should be the generation of the British public's awareness of Turkey as a tourist destination, and improving the initial motives and desires for visiting the country. And the role of the British travel trade, should be to transfer these desires into actual bookings and visits to the country. In this sense, British travel trade (tour operators and travel agents) seemed to be effective. Therefore, hypothesis two is partly supported.

In the following section, an attempt will be made to measure the degree of satisfaction/dissatisfaction of the British tourist's with their holidays in Turkey.

TOURIST'S SATISFACTION WITH TURKEY AS A TOURIST DESTINATION

In this section, the aim is to test the validity of the fourth hypothesis: The degree of satisfaction experienced by British tourists with Turkey is influenced by the activities of the Turkish tourism bodies and the tour operators which are offering the country as a tourist destination.

To measure the degree of satisfaction/dissatisfaction about their holiday in Turkey, the tourists were asked to indicate their opinions on four major tourism components. These components are; accommodation; local services; attraction and price level. The components were further broken down into a series of thirty-eight items. A five point Likert model scale ranging from 'very dissatisfied' to 'very satisfied'; 'very poor value' to 'very good value' were used. The responses were then ranked in order according to the mean value. The higher the value, the more satisfied the tourists.

Tourist's Length of Stay in Turkey

British tourists' were invited to indicate their length of stay in Turkey. A breakdown of the answers received is shown in Table 7.33. From the Table it can be observed that the two weeks period was the favourite for the British tourists under investigation, since the highest proportion of them (77.9%) spent this period of time in Turkey. Moreover, one week period came second where 16.5 per cent of participants indicated that they stayed this period of time.

TABLE 7.33 British Tourists' Length of Stay in Turkey

Value Label		Frequency	Percent	Valid Percent	Cum Percent
Less than 1 week		5	1.5	1.5	1.5
1 week		56	16.5	16.5	18.0
2 weeks		264	77.9	77.9	95.9
3 weeks		14	4.1	4.1	100.0
	Total	339	100.0	100.0	

Valid cases 339 Missing cases 0

Tourist's Satisfaction with Accommodation Aspects in Turkey

Many writers such as Wahab, (1975); Burkart and Medlik, (1981); McIntosh and Goeldner (1990) believed that accommodation service is considered as one important component of the tourist product. Therefore, if the service offerings were insufficient or ineffective, the tourists may not have achieved satisfaction with the visit to the tourist destination.

In order to find British tourists' satisfaction with accommodation services in Turkey, respondents were asked to rate their accommodation in terms of modernity of rooms; toilet/shower facilities; quality of food and drinks; cleanliness; efficiency of service; friendliness of staff; overall value for money; entertainment; and indoor recreational facilities, using a five-point scale, ranging from 'very dissatisfied' to 'very satisfied'. In addition, a separate label of 'do not know' was attached to the scale so as to judge the tourist's satisfaction with each factor. British tourists view on accommodation services in Turkey are shown in Table 7.34. The responses were ranked in order according to the mean value. The higher the mean value, the better the factor was considered by respondents.

TABLE 7.34 Tourist's Satisfaction With Accommodation in Turkey

ACCOMMODATION BASED	*Very dis-satisfied*		*Dissatis-fied*		*As Expected*		*Satisfied*		*Very Satisfied*		*Do not know*		*Total*	*Mean Value*
VARIABLES	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*
1. Friendliness of staff	-	-	7	2.1	17	5.1	58	17.2	249	73.5	7	2.1	338	4.659
2. Overall value of money	3	0.9	11	3.3	55	16.3	95	28.1	172	50.8	2	0.6	338	4.256
3. Efficiency of service	4	1.2	17	5.0	57	16.8	108	32.0	149	44.1	3	0.9	338	4.137
4. Cleanliness	9	2.7	15	4.4	76	22.5	117	34.6	121	35.8	-	-	338	3.964
5. Quality of food and drinks	5	1.5	22	6.5	79	23.4	110	32.5	120	35.5	2	0.6	338	3.946
6. Modernity of rooms	9	2.7	28	8.3	105	31.1	93	27.5	100	29.5	3	0.9	338	3.737
7. Entertainment	15	4.4	31	9.2	93	27.5	97	28.7	88	26.1	14	4.1	338	3.654
8. Toilet/shower facilities	23	6.8	56	16.6	97	28.7	82	24.2	78	23.1	2	0.6	338	3.405
9. Indoor recreational facilities	57	16.8	56	16.6	91	26.9	32	9.5	21	6.2	81	23.9	338	2.626

Number of total valid response = 339

Source: Field Research

* The higher the mean value, the more important the reason was considered by the British tourists.

Table 7.34 summarises the overall pattern of responses. British tourists were particularly happy with friendliness of staff, overall value for money and efficiency of service. Although the findings indicate that the British tourists were generally satisfied with the services received, they also reported some complaints about insufficient air conditioning in hotel rooms, and noise around hotels. Examples of the typical comments of tourists are reported below:

- ◊ "The main problem was far too much noise at our resort. Gumbet was non-stop for 24 hours and sleep was very difficult. I think this should be dealt with or tell us that the resort is only for young people not families."
- ◊ "I found it very noisy at night."
- ◊ "Noise regulations for bars would be appreciated. i.e. you can hear at 3 am lots of music from bars or outside hotels. Also keep music noise to a minimum in bars; difficult to sleep."
- ◊ "More air conditioned hotels."
- ◊ "Air conditioning in hotel room would have made the stay more pleasant."
- ◊ "Install more air condition units in hotels".

Moreover, it is worth noting that a great majority (72.6%) of British tourists stayed in hotels while they were in Turkey. Next came holiday village with 35.1% (Refer to Table 7.35).

TABLE 7.35 Type of Lodging Used by the Tourists

TYPE OF LODGING	*Frequency*	*Percent*	*Rank*
A. Hotel/Motel	246	72.6	1
B. Holiday village	119	35.1	2
C. Hostels	34	10.0	3
D. Camp/Caravan	23	6.8	4
E. Rented house	19	5.6	5

Number of total valid response = 339
Responses exceed 100% due to multiple response.
Source: Field Research

Tourist's Satisfaction with Local Services in Turkey

In order to assess the extent to which British tourists were satisfied with local services, twelve services and facilities: airport services (immigration and custom); entertainment and recreational facilities; restaurants; banking services; shopping facilities; tourist information services; taxi drivers; personal security; attitude of local people; hygiene and sanitation and quality of travelling roads were suggested to respondents who were asked to rate them using a five-point scale ranging from 'very dissatisfied' to 'very satisfied'. Moreover, a separate label 'do not know' was added to the scale for those respondents who may not have opportunity to experienced these services and facilities.

Table 7.36 presents the answers which ranked in order according to the mean value. The higher the mean value, the better the services were considered by respondents.

Respondents seemed to be more satisfied with the attitude of local people; shopping facilities; personal security and restaurants, while they were especially dissatisfied with airport services; hygiene and sanitation; and quality of roads.

At the end of questionnaire, an open-ended question invited tourists to express their comments and suggestions that would be helpful in making Turkey a better place to visit. Typical comments and complaints of respondents are introduced below:

1. Regarding to the attitude of local people towards tourists, nearly all British tourists seemed to be satisfied with local people, and no complaints were reported; they praised Turkish people.

TABLE 7.36 Tourist's Satisfaction With Local Services in Turkey

LOCAL SERVICES BASED	*Very dis-satisfied*		*Dissatis-fied*		*As Expected*		*Satisfied*		*Very Satisfied*		*Do not know*		*Total*	*Mean Value*
VARIABLES	***n***	***%***	***n***	***%***	***n***	***%***	***n***	***%***	***n***	***%***	***n***	***%***	***n***	*
1. Attitude of local people	8	2.4	9	2.7	34	10.0	74	21.8	208	61.4	6	1.8	339	4.396
2. Shopping facilities	6	1.8	9	2.7	48	14.2	119	35.1	145	42.8	12	3.5	339	4.187
3. Personal security	9	2.7	9	2.7	50	14.7	112	33.0	150	44.2	9	2.7	339	4.167
4. Restaurants	2	0.6	11	3.2	61	18.0	131	38.6	117	34.5	17	5.0	339	4.087
5. Banking services	8	2.4	13	3.8	63	18.6	91	26.8	84	24.8	80	23.6	339	3.888
6. Facilities offered at tourist cen.	6	1.8	13	3.8	63	18.6	78	23.0	59	17.4	120	35.4	339	3.781
7. Attitude of taxi drivers	13	3.8	21	6.2	58	17.1	74	21.8	61	18.0	112	33.0	339	3.656
8. Entertainment and rec. facilities	15	4.4	29	8.6	104	30.7	97	28.6	53	15.6	41	12.1	339	3.483
9. Airport service (Custom)	21	6.2	40	11.8	118	34.8	95	28.0	55	16.2	10	2.9	339	3.374
10. Airport service (Immigration)	32	9.4	44	13.0	112	33.0	84	24.8	55	16.2	12	3.5	339	3.263
11. Hygiene and sanitation	30	8.8	62	18.3	136	40.1	65	19.2	42	12.4	4	1.2	339	3.081
12. Quality of travelling roads	66	19.5	115	33.9	92	27.1	47	13.9	15	4.4	4	1.2	339	2.493

Number of total valid response = 339

Source: Field Research

* The higer the mean value, the better the services was considered by the British tourists.

2. Regarding shopping facilities, the research findings show that British tourists were generally satisfied with the services received, as they did not report any complaints. However some of them suggested that some tourists places needed to have good supermarkets that sold a variety of quality goods.

3. Regarding the personal security of tourists in Turkey, the research findings showed that majority of the British tourists felt secure during their stay in Turkey (Refer to Table 7.36). Therefore, personal safety of tourists earned good commendations from respondents and there was no complaints reported by the participants.

4. Regarding restaurants, the findings indicate that most British tourists were satisfied with the services provided. However, there are a few complaints reported by the respondents. Nearly all complaints concern about the hassle giving by restaurants' owners or staff to invite tourists to their restaurants. Here, some examples of the typical and familiar comments of the British tourists are:

- "Less hassle from people trying to sell meals."
- "Less pressure on buy or consume in certain restaurants."
- "I was annoyed by restaurant owner's trying to pressured us to eat at their restaurant."
- "Less invitation to visit restaurants."
- "Don't like the hassle of trying to be dragged into bars/shops and restaurants. To improve, stop hassling tourists and let them make their own minds up where to visit."
- "Less hassle from people trying to get you into their restaurants and bars."
- "I don't like bar and restaurant staff trying to drag me in off the street when I am out walking."
- "It was very annoying being stopped all the time "come to my restaurant."
- "I would appreciate it if restaurant owners were not so rude and forceful towards tourists".

In addition to the above complaints some tourists were not happy with hidden charges such as 10 per cent services charge and overcharging. One tourist reported that restaurant and bar owners overcharged. This will spoil the attractiveness of Turkey to British tourists. Furthermore, several other respondents complained about lack of varied menus and lack of Turkish food. They said "traditional food is being replaced by junk food".

5. Regarding banking services, no major complaints were reported about the services provided by banks, except the suggestions for more efficient and better services to be offered. In this respect, one tourist suggested that "the exchange offices should be made to show their rates of exchange and whether or not commission is payable."

6. Regarding tourist information centres, some respondents appeared to be unhappy with the services offered. Participants reported that information offered was poor and inaccurate. Respondents suggested that the number of tourist information centres in the towns should be increased and give better information for historic and places of interest to visit.

7. Regarding the attitude of taxi drivers, several complaints were received from respondents. Most complaints received were focused on driving the vehicles too fast and dangerously. Therefore, local administrations have to put tighter controls on taxi drivers.

8. Regarding the entertainment and recreational facilities, many participants seemed to be unhappy with facilities and entertainment offered and they complained about lack of entertainment at resorts and at hotels. Many of them needed more variation of entertainment. One tourist pointed out that there is a need for not only western forms of entertainment, but also for the authentic Turkish form of entertainment such as live Turkish music.

In addition, some British tourists complained about the entertainment and recreational facilities offered for children. They suggested improvements to recreational areas for children at resorts.

9. Regarding the airport services, taking into account the findings of the Table 7.36, together with the comments of respondents, it can be said that the British tourists are not satisfied with the services provided at the airports. Some of comments received from respondents in connection with airport services and facilities are reproduced here:

- "Airport facilities poor, overcrowded with no air conditioning"
- "The facilities at the airports are terrible. A sad last memory of fantastic holiday"
- "At the very end of the trip we missed the plane in a chaotic Istanbul airport. Should be better organisation in an international airport"
- "I have travelled many places but have never used a worse airport (Adnan Menderest Airport-Izmir)"
- "Airport administration at Izmir was very poor on arrival"
- "Improve the speed of services at airports and air conditioning. Airports are hot and uncomfortable. This ruins the trip for most people."
- "Airport check in very poor, not organised enough, staggered check in times"
- "Poor loud speaker system and no information about the delay".

Another complaint was the behaviour of porters at airports. Respondents comment on that issue as follows: "Porters at the airports take advantage of tourists, grabbing their baggage and charge too much", "Airport porters are too pushy demanding to carry luggage and then expecting large tips. New comers to Turkey often give too much as they are not familiar with Turkish Lira", "The airports porters are very off putting giving a completely wrong impression of Turkey".

Moreover, one tourist was not happy with the attitude of immigration officers and suggested that "improve the friendliness of airport immigration/passport control as the impression gained from them is one of a country that does not want you to enter it which is a complete contrast to the attitude of everyone else I encountered".

Therefore, insufficient and inefficient services and facilities provided at the airports such as air conditioning and announcement system, more seats, no smoking areas, toilets facilities, facilities for disabled people, baggage handling on arrivals, sign posting and administration at the airports need to be improved.

10. Regarding hygiene and sanitation, British tourists generally appeared to be dissatisfied with the hygiene condition in Turkey. It is the fact that in some places in the country, standards of sanitation needs to be improved not just for visitors but also for residents. This should be fully acknowledged by the Ministry of Health and other responsible authorities.

11. Regarding the quality of roads, transport service is generally regarded as an important component of the tourist product of any destination country since it gives accessibility to tourist attractions and facilities.

TABLE 7. 37 The Means of Transportation Used by the Tourists in Turkey

MEANS OF TRANSPORTATION	*Frequency*	*Percent*	*Rank*
A. Public buses	220	64.9	1
B. Coach (package)	179	52.8	2
C. Taxi	167	49.3	3
D. Air plane	95	28.0	4
E. Rented auto	23	6.8	5
F. Boat	16	4.7	6
G. Rail	12	3.5	7
H. Private auto	9	2.7	8

Number of total valid response = 339
Responses exceed 100% due to multiple response.
Source: Field Research

From the Table 7.37 it can be observed that public buses, coach (package) and taxi were the top three transportations means used by the British tourists while in Turkey. However, other means of transport were rarely used.

Referring the Table 7.36, British tourists seem to be highly dissatisfied with the transport services in Turkey. There are different complaints about transport services, most complaints received were focused around the long journey to many tourist resorts. Typical and familiar remarks related to this issue is reproduced here:

* "The transfer from the airports to accommodation are far too long."
* "The journey from the airport is much to long. I would came again if another airport was closer to Gumbet."
* "Gulluk airport needs to be hurried up as the transfer from Izmir wastes time."
* "Infrastructure of roads needs to be improved to increase comfort and reduce transfer time from airports."
* "Long transfer to resorts is uncomfortable."

Another complaint on this subject was safety on roads. For instance, one tourist reported, "I feel that the roads are very dangerous whilst in Turkey. I was involved in a road accident". Further examples are "Roads make people very worried about travelling long distances", "I think people would feel a lot safer if the standard(s) of roads were improved. They would feel more confident about travelling around the country".

It must be pointed out that these and other problems associated with transportation service are an inadequate infrastructure that needs urgent modification. Therefore, the government must spend more money on roads if they wish tourists to return for a vacation, as land transportation is the major means of transportation in Turkey. Moreover, if the roads were improved, the transfer time from the airport to the resorts would be reduced and also trips and excursions would be more enjoyable.

Tourist's Satisfaction with Tourist Attractions in Turkey

As previously noted in Chapter two, the tourist attractions of Turkey as a destination includes a wide range of tourist assets such as historical, cultural and natural attractions and its mostly unspoilt beaches.

Respondents in this study were asked to indicate their views on the attractiveness of Turkey. A five-point Likert scale used, ranging from 'very disappointing' to 'far exceeded expectation'. Additionally, a separate column 'do not know' was added to the scale with the purpose of assessing precisely the level of attractiveness of attractions experienced by the visitors. Table 7.38 displays the answer received from respondents. The higher the mean value, the more attractive the attraction was regarded by British tourists.

Referring to Table 7.38, respondents were mostly satisfied with Turkey's historic assets, its beaches and night life offer at resorts. However, there are evidence that not enough is done to protect Turkey's historical attractions in the most favourable way. There are many comments of the British tourists on this issue, some of them reproduced below:

- "It is a shame some of the sites of historic and natural interest such as Pamukkale are being ruined by the tourist industry"
- "In Pammukkale the hotels are ruining the beautiful attractions"
- "I think that Turkey should stay just the way it is and not let tourism spoil its natural beauty for example the hotels taking the water from Pammukkale, as once things and sights like this have gone, so will the tourists".

Additionally, respondents were asked to identify the destinations visited within Turkey. Table 7.39 shows that the Aegean coast was the most popular region with British tourists. Nearly 67 per cent of them ranked it as number one destination. The Mediterranean coast came second with 66.3 per cent. The Table also indicates that Eastern Anatolia, Black Sea Coast and South Eastern Anatolia were rarely visited by British tourists while in Turkey. This may be due to the fact that the British tourists visit Turkey mainly for a sun, sea, sand destination which these regions do not offer and another reason might be tourist facilities at these regions were not adequate as international standards.

TABLE 7.39 Most Frequented Regions in Turkey by the British Tourists

REGIONS	Frequency	Percent	Rank
A. Aegean Coast	227	66.9	1
B. Mediterranean Coast	225	66.3	2
C. Marmara	120	35.4	3
D. Central Anatolia	79	23.3	4
E. Eastern Anatolia	10	2.9	5
F. Black Sea Coast	6	1.8	6
G. South Eastern Anatolia	2	0.6	7

Number of total valid response = 339
Responses exceed 100% due to multiple response.
Source: Field Research

It is clear from the above Table that the British tourists visit mainly coastal areas in Turkey. This result supports the view that the country offers sun, sea and sand to its customers. Moreover, the popularity of coastal areas over the other areas could be attributed to the level of tourism development in the respective areas. As previously argued in Chapter two, in 1993 Aegean, Mediterranean and Marmara regions together comprised 87 per cent of total bed supply (See Figure 2.2).

Drawing upon the whole analysis of the tourist attraction and comments from British tourists, it can be concluded that customers were generally satisfied with attractions of the country. However, there is evidence that not enough is done to present these attractions in the most favourable way. In this sense, it is important to

TABLE 7.38 Tourist's Satisfaction With Attractions in Turkey

ATTRACTIONS BASED	*Very dis-satisfied*		*Dissatis-fied*		*As Expected*		*Satisfied*		*Very Satisfied*		*Do not know*		*Total*	*Mean Value*
VARIABLES	*n*	%	*n*	%	*n*	%	*n*	%	*n*	%	*n*	%	*n*	*
1. Historical interest	2	0.6	7	2.1	43	12.7	86	25.4	161	47.5	40	11.8	339	4.328
2. Night life	8	2.4	9	2.7	60	17.7	106	31.3	116	34.2	40	11.8	339	4.047
3. Beach resorts	16	4.7	17	5.0	64	18.9	100	29.5	126	37.2	16	4.7	339	3.938
4. Water sport facilities	10	2.9	17	5.0	44	13.0	67	19.8	91	26.8	110	32.4	339	3.926
5. Architecture	7	2.1	22	6.5	70	20.6	75	22.1	105	31.0	60	17.7	339	3.892
6. City tour	8	2.4	8	2.4	51	15.0	48	14.2	42	12.4	182	53.7	339	3.688
7. Cultural shows	11	3.2	20	5.9	46	13.6	47	13.9	45	13.3	170	50.1	339	3.562

Number of total valid response = 339

Source: Field Research

* The higher the mean value, the more attactive the attraction was regarded by the British tourists.

note that one of the main responsibilities of the Turkish Ministry of Tourism is to protect and preserve the country's tourist attractions, and to present them for the future generation.

In the following, an attempt will be made to explore the British tourists' satisfaction with the prices of tourist services and facilities in Turkey.

Tourist's Opinions on the Prices Level of Tourist Service and Facilities in Turkey

With the purpose of assessing the prices of tourist services and facilities in Turkey, participants were asked about their views on cost of air flights to Turkey and flights within the destination; price of accommodation; cost of local transportation; price of food and drinks; cost of excursions; price of the package tour to destination; general price of the trip; and their opinion on shopping and entertainment. Again a five-point Likert type scale ranging from 'very poor value' to 'very good value' was used. In addition, a separate column of 'do not know' was attached to the scale so as to assess more accurately the opinions of the British tourists. Table 7.40 shows the answers received from respondents and ranked in order according to the mean value below. It is important to noted that the higher the mean value, the lower the price of the tourist services and facilities was considered by the British tourists.

It was supposed that if the scores of the first two columns -very poor value and poor value- outweighed those scores of the following three columns -satisfactory, good value and very good value-, it would mean that the British tourists were dissatisfied with the price of the tourist services and facilities in Turkey. The reverse results would be satisfied with the price of the tourist services and facilities in Turkey.

Using the above criteria, as can be seen in Table 7.40 that the British tourists were satisfied with the price of all tourist services. It is important to bear in mind that cheap countries are not necessarily the most attractive, despite the fact that the total selling price is one of the strongest influences on the number of tourist who choose a specific destination. In other word, prices are not the only factors. If the country lacks enough facilities, or is poorly known to the travelling public, its cheap prices will not be so much of an advantage.

On the other hand, there are few complaints received from respondents. Examples of the typical comments of participants are:

◊ "Price variation between shops are too great"
◊ "Different prices for the same product for different people, i.e. foreign tourists and native local"
◊ "We paid more in our hotel bar than we do at home. This was also true of tourist attractions"
◊ "Stayed at a Club Med holiday village and although watersports facilities were excellent, the prices were expensive even for UK and I felt that much of this money would not be received in the Turkish economy".

Conclusion

The purpose of this section was to assess the degree of satisfaction experienced by the British tourists with Turkey. One main conclusion to be derived from the discussion in this section is that the British tourists were generally satisfied with most services offered, attractions visited, and prices paid, Therefore, hypothesis four is supported by the data.

THE OVERALL SATISFACTION OF THE TOURIST'S WITH THE VISIT

With the purpose of testing hypothesis five, the British tourists were requested to describe their visit to Turkey. They were asked whether or not they will visit Turkey again. Figure 7.3 demonstrates the British tourists' opinions.

TABLE 7.40 Tourist's Satisfaction With Price Level in Turkey

PRICE LEVEL BASED	*Very poor value*		*Poor value*		*Satisfac-tory*		*Good value*		*V. Good value*		*Do not know*		*Total*	*Mean Value*
VARIABLES	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*%*	*n*	*
1. Local transportation	2	0.6	6	1.8	44	13.0	98	28.9	153	45.1	36	10.6	339	4.300
2. General price of the trip	1	0.3	12	3.5	53	15.6	125	36.9	142	41.9	6	1.8	339	4.186
3. Food and drinks	4	1.2	10	2.9	53	15.6	135	39.8	131	38.6	6	1.8	339	4.138
4. Shopping	9	2.7	7	2.1	53	15.6	124	36.6	139	41.0	7	2.1	339	4.136
5. Package tour to destination	5	1.5	8	2.4	58	17.1	121	35.7	118	34.8	29	8.6	339	4.094
6. Accommodation	6	1.8	15	4.4	60	17.7	111	32.7	132	38.9	15	4.4	339	4.074
7. Air flight to Turkey	5	1.5	11	3.2	61	18.0	107	31.6	117	34.5	38	11.2	339	4.063
8. Flight within destination	3	0.9	8	2.4	28	8.3	48	14.2	43	12.7	209	61.7	339	3.923
9. Entertainment	5	1.5	14	4.1	80	23.6	103	30.4	98	28.9	39	11.5	339	3.917
10. Excursions	6	1.8	21	6.2	68	20.1	97	28.6	99	29.2	48	14.2	339	3.900

Number of total valid response = 339

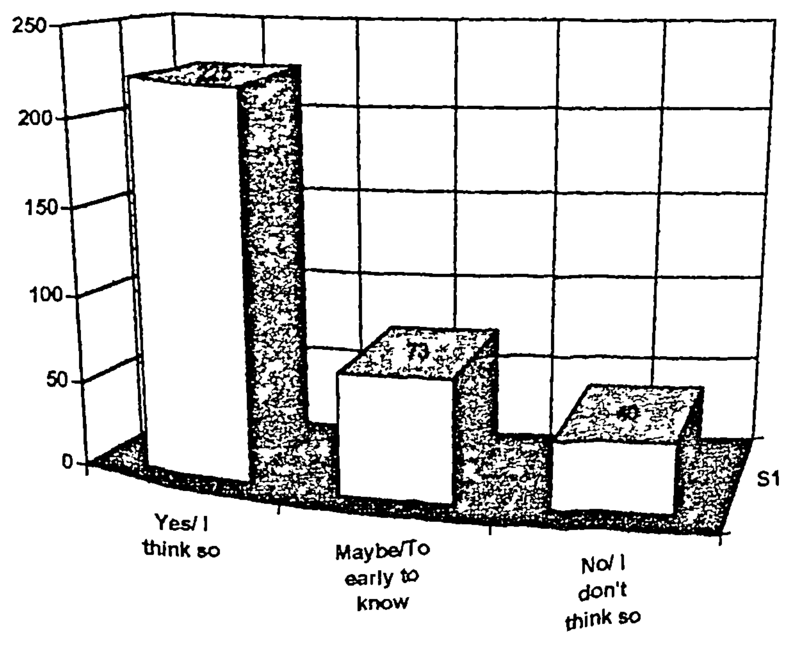
Source: Field Research

* The higher the mean value, the lower the price of the tourist services and facilites was considered by the British tourists.

From Figure 7.3 it can be clearly observed that the majority of the British tourists were satisfied with the visit to Turkey. As a result of this satisfaction 87 per cent of respondents would recommend Turkey to their friends and/or relatives (See Figure 7.4).

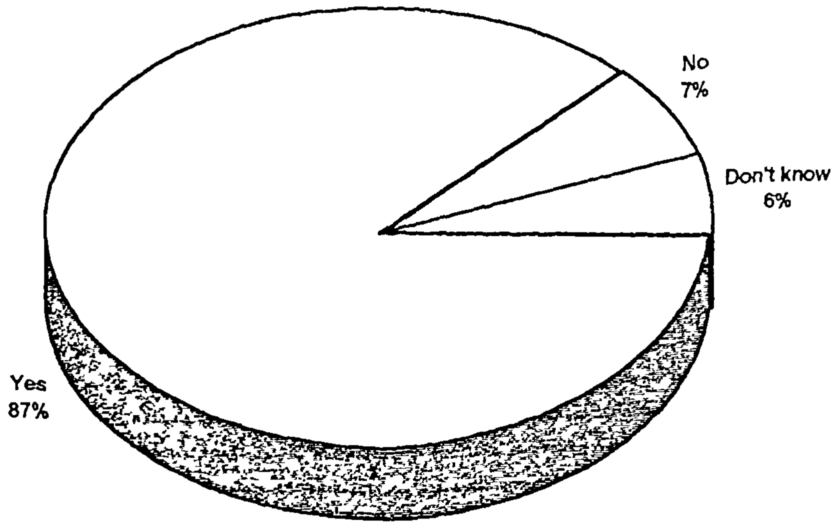
Additionally, with the purpose of attaining more information about the British tourists' satisfaction with the visit to Turkey, those who have ambition to or may visit the country again were requested to mark the five most important reasons that would encourage them to do so, from the ten reasons given to them by the questionnaire. Moreover, they were requested to add any other which was not included. Table 7.41 provides a breakdown of the British tourists' opinions on these reasons and ranked according to the frequency of mention.

FIGURE 7.3 Tourist's Satisfaction With the Visit to Turkey



Number of total valid response =338 (100%)

FIGURE 7.4 British Tourists' Recommendation of Turkey to Their Friends and or Relatives.



Number of total valid response = 295 (100%)

TABLE 7. 41 The British Tourists' Opinions on Reasons for Coming Back to Turkey

REASONS FOR COMING BACK	Frequency	Percent	Rank
A. Warm, sunny and bright weather	274	91.9	1
B. Friendly people	244	81.9	2
C. Reasonable prices generally	236	79.2	3
D. Comfortable accommodation	189	63.4	4
E. Nice beaches	167	56.0	5
F. Plenty to do and see there	160	53.7	6
G. Availability of organised package tour	118	39.6	7
H. Attractive historic monuments	117	39.3	8
I. Comfortable flight to Turkey	66	22.1	9
J. Helpful tourist information centres	10	3.4	10

Number of total valid response = 298 (100%)
Responses exceed 100% due to multiple response.
Source: Field Research

From the Table 7.41, it can be observed that warm, sunny weather; friendly people; reasonable prices generally; comfortable accommodation and nice beaches were the important reasons considered by the British tourists for coming back. This confirms the point of view of the tour operators that Turkey is a destination to be visited as a sun, sea and sand destination.

On the other hand, in order to have more information about the dissatisfaction of the British tourists with the visit, those who decided not to visit Turkey again were invited to classify the five most important reasons that discourage them from doing so. Again, ten reasons were proposed to them by the questionnaire and an opportunity was given to add any other reasons which were not included.

The British tourists' opinions on reasons that discouraged them from coming back to visit Turkey are listed in order of the frequency of mention and displayed in Table 7.42. As can be seen from the Table that noisy, unhygienic country; lack of variety of attraction and little to do and see there were the first three reasons considered by the respondents not to visit Turkey again.

TABLE 7. 42 The British Tourists' Opinions on Reasons for not Coming Back to Turkey

REASONS FOR NOT COMING BACK	Frequency	Percent	Rank
A. Noisy, unhygienic country	33	80.5	1
B. Lack of variety of attraction	30	73.2	2
C. Little to do and see there	29	70.7	3
D. Uncomfortable roads for travelling	27	65.9	4
E. Uncomfortable accommodation	25	60.9	5
F. Crowded and dirty beaches	23	56.1	6
G. High prices generally	21	51.2	7
H. Rude unfriendly people	16	39.0	8
I. High cost of getting there	10	24.4	9
J. Unhelpful tourist information centres	8	19.5	10

Number of total valid response = 41 (100%)
Responses exceed 100% due to multiple response.
Source: Field Research

Finally, participants were asked to indicate their overall satisfaction with their visit to Turkey, compared with their original expectations of the trip. As can be seen clearly from Figure 7.5 a great majority of respondents (92.3%) were overall satisfied on their visit to Turkey, only a small proportion of the British tourists (7.7%) were not satisfied. It is worth noting that 11.8 per cent of the respondents were extremely satisfied with Turkey.

FIGURE 7.5 Overall Satisfaction of the British Tourists with Turkey

Extremely Dissatisfied → → → Extremely Satisfied

0%		20%		40%		60%		80%		100%
↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑
0%	0%	0%	1.5%	2.7%	3.5%	6.5%	13.0%	35.7%	25.3%	11.8%

Number of total valid response = 339 (100%)
Source: Field Research

Comments by the British Tourists

An open-ended question at the end of the questionnaire invited tourists to express their views of Turkey as a holiday destination. Some of their remarks related to their holiday experiences are represented below:

- "Thoroughly enjoyed our holiday in Turkey. Will return !!"
- "Turkey is a lovely place."
- "I have a very nice time yachting on our yacht."
- "It was a great trip overall."
- "You have a wonderful country".
- "I was more than happy with everything Cesme has to offer."
- "A very enjoyable trip."
- "On the whole very good, very friendly and very enjoyable."

- ♦ "We like the people who are friendly and helpful in this interesting country, we will be back."
- ♦ "Goodbye see you again."
- ♦ "Turkey is great, I would come again."
- ♦ "Turkey is a beautiful country."
- ♦ "I thoroughly enjoyed my holiday."
- ♦ "We have enjoyed our holiday in Bodrum immensely and we will definitely be coming back to Turkey to see other tourist destination."

Hospitality dimension of the country seemed to draw a lot of praise from the British tourists.

- * "People in Turkey are most helpful and friendly."
- * "Our holiday to Turkey was one of the best we have been on. The local people were wonderful."
- * "Turkey and its people are wonderful I hope that remain that way."
- * "The people are very friendly and helpful."
- * "A lovely country with kind, caring people ...".
- * "Turkey is a beautiful country with lovely people."
- * "Local people made our holiday for us."
- * "The Turkish people are so warm and friendly and were happy to talk about their country."
- * "Having travelled throughout Europe I was very excited about visiting Turkey most people were very friendly."

Tourism attractions, facilities and amenities of the country seemed sufficient to meet tourists' needs and expectations as can be concluded from the following comments:

- "Excellent standards throughout."

- "This is my second time in Turkey. I am generally satisfied with the standards."
- "Overall a very enjoyable holiday."
- "I find that the beaches are always well maintained."
- "Overall an excellent holiday."
- "The services and hospitality are excellent we shall be coming back in a few mounts time! Well Done!"

Besides, there are some respondents expressed concern about the possibility of over development in the Turkish tourism industry:

- ♦ "Do not allow resorts to be over developed."
- ♦ "Don't let tourism take over your country; it is a beautiful place and has plenty of history. Tourism may spoil that in someway."
- ♦ "On Cesme I think the best thing is to leave it as it is. It was wonderful to be there. Don't make it any bigger!"
- ♦ "Keep it unspoilt and not too build up" are common remarks.

The needs to protect Turkish culture and identity was also highlighted many respondents, some of these comments reproduced below:

- ◊ "Please, don't lose your culture to other nationalities; retain it yourself."
- ◊ "Please don't let it become over commercialised."
- ◊ "Keep it Turkish, don't let Turkey become too commercialised."
- ◊ "Please keep Turkey Turkish! You have a beautiful country and warm friendly people. Don't spoil it with commercialism."
- ◊ "To keep Turkey unspoilt and not to commercialised."
- ◊ "We hope that Turkey does not become too commercialised. As we enjoy your culture."
- ◊ "I hope that the Turkish people will not be changed by too much commercialism."
- ◊ "Don't change anything, Turkey is a wonderful country."

◊ "I would hope that Turkey would remain un-spoilt by not becoming too commercialised."
◊ "Don't spoilt it with too much westernisation."
◊ "Some of your resorts are too English! You may think this is what is wanted but a lot of people like me want to experience of the culture of Turkey. Buy English fish and chips and pay for it in English money."
◊ "Please do not allow the small unspoilt non commercial resorts become large and commercialised."

Finally, a few numbers of respondents suggested that more should be done by those involved in marketing Turkey "more advertisement on local UK television and public awareness in London", " more promotion in Europe."

From the whole analysis above and comments made by the British tourists, one can be concluded that the hypothesis five: as an overall statement, the British tourists are satisfied by the Turkey's tourism facilities and attractions, is supported.

SIGNIFICANT FINDINGS FROM THE FIELD RESEARCH

The findings from the tour operators' survey indicated that the majority of tour operators are familiar with Turkey as a tourist destination, which is perceived as a destination to be visited mainly for its good weather together with value for money and the historic attractions. Turkey is regarded as sun and sea destination like many other Mediterranean countries.

The majority of tour operators surveyed are satisfied to a great extent with the price of tourist services in Turkey. However, a few tour operators were not satisfied with the prices of flights within the destination and to Turkey. However, in the view of the tour operators, the price of food and drinks appeared to be cheap. The explanation for this could be that Turkey produces most of her food. This may contribute to low prices of meals at hotels and restaurants. Therefore, tour operators' satisfaction with the price of the Turkish tourist services can be an advantage in the international tourism market. Moreover, some tour operators pointed out that the tourist facilities in Turkey needed improvement in order to be considered adequate by European standards.

The findings also showed that there are no great promotional efforts directed towards the tour operators to sustain this relationship. The majority of tour operators remarked that they never received any promotional funds from any of the Turkish tourist organisations. This may be due to the fact that there is a shortage of funds available for promotion.

From the British tourist survey, it was found that the majority of the sample of British tourists visiting Turkey was married, had below university level education, were between aged 25-35 years, and the family total income per year between £20,000-29,999.

For both first times and repeat visitors to Turkey, the image of the country was entirely based on its good weather and clean beaches. Respondents also expected to meet friendly people; anticipated things to do and see there; and expected to find clean beaches and comfortable accommodation and to feel secure while in Turkey. In other words, the image of the country in the viewpoint of the British tourists was a sun, sea and sand destination.

Recommendations from travel agencies and friends and relatives were the most two important factors that led the British tourists to be interested in taking a holiday in Turkey. In terms of travel arrangements, research findings reveal that travel agents played an important role as their visits to Turkey were mainly arranged by the British travel trade in the form of package tours.

The study also showed that the Turkish Airlines, the national carrier, appeared to have a very weak position in the air travel market from the UK to

Turkey. Since most British tourists either used British charter airlines or British Airlines.

The findings from the British tourist survey also reveal that the British tourists were generally satisfied with most services offered, attractions visited, and prices paid. However, some dissatisfaction also found among visitors specially with airport services, hygiene and sanitation, and quality of the roads.

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Chapter Eight

Strategic Plan for Turkish Tourism

INTRODUCTION

Since the last decade, Turkey has been witnessing a significant growth in its foreign tourism demand. However, it is rather difficult to claim that the popularity of Turkey as a tourist destination is the result of conscious and well planned marketing and promotional efforts of the Ministry of Tourism and other related organisations.

Although Turkey has an outstanding tourism potential, it is not utilising its resources adequately. The image of Turkey for the British tourists and other major markets principally consists of three basic elements: sun, sea and sand. However, it goes further than that since Turkey is known to be a very hospitable place with an interesting cuisine and with the privilege of a simple and untouched way of life in the countryside, which makes many tourists return year after year. Even in the big cities a single person feels safe to go out at any time without fear of violence, something that not many countries in the world can boast about. It is needless to mention the richness of culture resulting from centuries of civilisation, an inheritance which gives the Turkish tourist product an important advantage.

On the other hand, the sudden development of the tourism sector in Turkey created a number of problems that undermined the healthy development of tourism. The most important drawback of the tourist product is the poor infrastructure or in some cases the non-existence of any infrastructure at all. The road and rail networks are in a bad condition, there are not enough airports while the existing ones are not very efficient and generally the whole of the country is not well enough developed to accept the masses of tourists and satisfy their needs effectively.

In the following a plan has been prepared for the future formulation of Turkish tourism. It analyses the current strengths and weaknesses as well as the opportunities and threats and identifies the action which needs to be taken by those who provide support to the industry.

STRENGTHS AND WEAKNESSES, OPPORTUNITIES AND THREATS ANALYSIS

Strengths

In general, strengths refer to the country's values, resources and advantages at the present that are the basic factors influencing the travel decisions of tourists. From the field work the strengths of Turkey in tourism can be summarised as follows:

- Rich historical and cultural heritage with a history dating back to 8,000 BC.,
- 7,100 km coastline with beautiful and sandy beaches,
- Clean and unspoilt nature,
- Varied landscape with mountains, forests and rivers,
- Warm climate,
- Annual average amount of sunshine ranging from 150 days to 300 days,
- Blend of exotic and modern appeals,
- Geographic gateway between Europe and Asia,
- Friendly and hospitable people,
- Good value for money,
- Rich and delicious cuisine,
- Wide number of water sports, yachting and sailing facilities,
- Safe environment,
- Inexpensive local transport,

- ♦ Varied and reasonable priced shopping items such as antiques, traditional handicrafts etc.

From the tourist survey, the majority of the British tourists were satisfied with their visit to Turkey. As a result, 87 per cent of respondents would recommend Turkey to their friend and/or relatives.

Weaknesses

For all Turkey's strengths, however, there are some weaknesses and disadvantages, some of which can be eliminated while some are external factors. The weaknesses and disadvantages for tourism in Turkey can be outlined as follows:

- ◊ Inadequate infrastructure,
- ◊ Danger of overcrowding in the main tourist areas during peak seasons,
- ◊ Poor road and rail network,
- ◊ Weak image of Turkey abroad,
- ◊ Lack of trained personnel,
- ◊ Insufficient number of large airports and airport facilities,
- ◊ Seasonality problems,
- ◊ Too much building and construction activity,
- ◊ Danger of sea pollution,
- ◊ Inadequate bed capacity,
- ◊ Relatively low standards of tourist services,
- ◊ Poor sanitary conditions,
- ◊ Insufficient accommodation facilities in terms of camping, youth hostels and self catering establishments,
- ◊ Budget constraints for further development,
- ◊ Relatively distant from the main tourist generating countries of Europe in comparison with the rival countries in the Mediterranean.

From the field work, two of the main issues that tourists complained about were the poor sanitary conditions and the local transportation. It is important to improve the conditions and the services provided for the foreign tourists, because dissatisfied tourists mean no repeat visits to Turkey, and will create a bad image among the potential visitors as a result of the word-of-mouth communications of the perceived experiences of the actual visitors.

From the tourist survey, recommendations of friends and relatives was the second factor contributing to the arrivals of British tourists in Turkey, where 44.5 per cent of them reported that such considerations encouraged them to travel to the country. Therefore elimination of the unsatisfactory conditions is significant.

Opportunities

Opportunities can be found in the form of new products or new markets which can be profitable and beneficial in the future. The main opportunities in Turkish tourism are :

- Availability of diversified products for new types of tourism besides beach holidays,
- Relatively new destination in the tourism markets,
- Availability of different niche markets,
- Thermal tourism opportunities owing to the great number of thermal springs scattered throughout the Western Anatolia,
- Increasing conference and incentive travel as a result of increased conference capacities and facilities of the big hotels,
- Increasing popularity of mountaineering, trekking and wildlife tours,
- Increasing interest in the special interest tourism activities such as sailing, golf etc.

It is meaningful to utilise these opportunities as new product or market developments in order to have advantages over the competitors.

Threats

The current competitive situation is one of the greatest threats to the industry. A number of countries situated in the same geographical area in the Mediterranean region share similar characteristics to Turkey such as the sun, sea, climate, natural and cultural values. These similarities necessitate the promotional activities of Turkey to be effective and distinctive so that it can attract and influence the demand toward itself. In brief, there is need, therefore, to invest more heavily in facilities, and spend more on marketing. New competitors are still arriving. Turkey must respond by improving all aspects of its industry.

Another threat to the industry is related to conservation and protection of cultural and historical treasures. The lack of control of the government has been leading to mistreatment of archaeological remains in particular, in Antalya, Side and Pamukkale (Hierapolis).

Turkey has many fundamental and enduring strengths. The identification of important strengths and weaknesses as well as the opportunities and threats facing Turkey as an international tourist destination is a crucial element in developing the marketing and promotion plans.

The awareness of the weaknesses and threats provides an essential advantage for guiding the strategies and plans. It would be fair to say that like any other country, Turkey has its own strengths and weaknesses over its competitors, opportunities that can be developed and threats to be overcome. Being aware of these as well as the current situation of the competitors and markets is crucial to the development of tourism in a way beneficial to the economy and the society.

OBJECTIVES OF THE FUTURE STRATEGIC PLAN

Turkey's tourism product has outstanding potential. In order to maximise that potential and so realise the greatest benefits to Turkey, the tourism industry in Turkey must:

⇒ Build on Turkey's real advantages in terms of scenery, environment, history, culture and opportunities for activities and special interests.

⇒ Increase tourism in the off-peak periods.

⇒ Be environmentally sensitive and sustainable.

⇒ Increase the spread of tourism throughout Turkey.

⇒ Build up solid repeat business based on customer satisfaction and reputation for quality and value for money.

These broad aims are supported by the following principal objectives:

* To promote tourism in a more effective and co-ordinated way at all levels in the industry.
* To create new facilities, and improve existing ones, which cater for particular target market.

In order to achieve the above aims and objectives the following key issues and priorities should be considered.

KEY ISSUES AND PRIORITIES

We need to overcome a number of the weaknesses already identified. These relate not so much to Turkey's basic tourism resources, but to the infrastructure and facilities, commercial and otherwise, which allow Turkey's basic tourism strengths to be exploited. Specifically:

- Facilities do not meet the needs of all target markets. There are shortcomings in accommodation, entertainment, sports and indoor recreation, facilities for children.
- The standard of facilities and services varies widely and individual businesses often do not make the best of the resources available to them.
- The promotion of Turkey itself, and of individual products and places has been fragmented and often not as effective as it could be.
- Many of Turkey's weaknesses have been compounded by poor levels of skill throughout the industry.

The future of Turkish tourism depends very largely on its ability to see the tourist as a consumer. There is need to respond quickly to consumers' reactions, acting on both their compliments and complaints. More awareness is needed that tourists come in many guises with many different interests and needs. If Turkey is to be successful, there must be a simple theme - quality - for all activities.

In the following will be outlined the main priorities for Turkish tourism. These are: Marketing, Accommodation, Seasonality, Services, Transport, The Natural Environment, Training and Things To Do.

Marketing

Although much of Turkey's product is good, the image is very weak. In the past and even now the marketing message may have over emphasised the climatic feature - sun, sea and sand - at the expense of other attractions.

Turkey's scenery, its dynamic culture, its natural environment, its colourful history, its built heritage, and its opportunities for sport and recreation, make up the product known as Turkish tourism. Therefore, Turkey's message to the UK and other major market needs to have common themes such as 'Year Round Turkey'. This can be achieved by collaboration between the public and private sector organisations involved in marketing Turkey's various products.

Moreover, the Ministry of Tourism should recognise the importance of business tourism, as it has a key role to play in increasing yield, combating seasonality and reinforcing broader economic development goals. To date, there have been missed many opportunities in this area, and Turkey now needs to compete in a rapidly developing international marketplace.

The marketing strategy must trade on Turkey's main strengths as a destination, and the Ministry should concentrate on to campaign conference and incentive scheme organisers. The industry must also acknowledge the role of conferences and meetings in the wider economic development of Turkey, by linking conference marketing and development with Turkey's strengths in certain sectors.

Furthermore, the Ministry of Tourism should undertake joint marketing activities as a means of stretching its marketing budget, and also encourage the private sector to co-ordinate their overseas marketing activities with the Ministry. The task of marketing Turkey can not be accomplished without the total commitment of the private sector. Therefore, the Ministry should offer them opportunities to take part in joint marketing schemes.

A well co-ordinated, industry-wide campaign with the twin aims of consolidating existing market sectors and opening up new ones, will be critical for the success of the future Turkish tourism. The Ministry of Tourism should aim to:

- Develop a co-ordinated long term marketing campaign to increase Turkey's share of the UK and other major markets.
- Evaluate, develop and promote geographical and product-based niche markets.

- Continue to participate in international travel fairs and exhibitions, as these events bring together the consumer, the travel trade and the tourism product operators and suppliers.
- Develop awareness of Turkey around common images in co-operation with other public and private sector organisations who market Turkish products.

Accommodation

Standards of services, training, seasonality, entertainment, leisure and conference facilities, are amongst the issues which are critical to the future of the accommodation sector.

Turkish hotels offer a wide range of accommodation. Standards of quality and service are generally seen to be improving. Nevertheless, not all Turkey's hotels are open all year round, and there is a growing demand for additional facilities and services. Frequent changes of ownership and lack of capital tend to limit the scope for improvement.

Turkish pansion (guest) houses offer good, friendly service and are well distributed throughout the coastline. However, they can be difficult to book, especially from overseas, many are closed in the off-peak period, and there is often little staff training.

Turkey's camping and caravan facilities, many of which are closed through the autumn and winter have relatively low levels of occupancy. There is continuing need to upgrade facilities.

The industry should devote more effort to upgrading standards of services provided, and should pay special attention to entertainment, indoor recreational facilities and children's leisure facilities, baby-sitting services. Disabled people should not be disadvantaged. Also, hotels in and near main population centres need to develop specialist facilities and appropriate levels of services for the conference, meeting and incentive travel markets. The initiative for improvements to accommodation must come from the private sector. The Ministry of Tourism and the Development Bank of Turkey should be the main public sector mechanisms for encouraging this.

Seasonality

Tourism in Turkey is generally concentrated into the spring and summer periods. It is a priority to extend the season. Turkey must take the appropriate measures for the minimisation of the seasonal problems, by creating indoor facilities such as heated swimming pools, indoor sport centres etc. in order to improve the standards of its tourist product.

However, for seasonality to be overcome, the tourist image of Turkey should change. The image - as a sun, sea and sand destination- that has been projected both by the Ministry of tourism and British tour operators is inappropriate for year round tourism. The image of the Turkey has to change in order to attract more cultural and educational tourism, along with the business market. New targets must include the wanderlust tourist who will visit Turkey for its historical interests, its traditional treasures and cultural heritage.

Moreover, as the average life expectancy has increased and there is a trend towards early retirement, more and more people of this age group find themselves with a lot of money and plenty of free time to take trips they could not do during their youth. Specialised tour operators in Britain are increasingly exploiting this segment, thus Turkey should take advantage from this market during the winter months.

Whatever solution or combination of solutions is adopted to overcome seasonality, it will need the co-operation of both the private and the public sector to undertake relevant feasibility studies, and to conduct market research, before sensible decisions can be taken.

Services

Visitor services: Many visitors are unfamiliar with aspects of Turkey's geography, language, customs and lifestyle. The more help is given to orientate themselves to the country, the more favourable their impressions are likely to be.

In broad terms this means ensuring that they have easy access to detailed information about Turkey, not only once they get here, but before they leave home. They need to be fully informed about the 'what, when, where, why and how' of the sights and facilities Turkey has to offer. Where there are gaps in information, as, for instance, in the case of entertainment, it must be a priority to address these at national and local levels.

Catering: The availability of a distinctive national cuisine should mean that food is one of Turkey's great tourism strengths. Unfortunately, poor preparation and presentation, a lack of imagination and effort, poor service and low value for money have left Turkish catering with an indifferent reputation.

Turkey needs catering facilities that suit the range of tastes and budgets of different market sectors, from top quality restaurants to reasonably priced family restaurants at popular tourist destinations and visitor attractions.

Moreover, available facilities for disabled visitors need to be publicised and more facilities that cater adequately for the disabled should be provided.

Shopping: Along with eating out, shopping is a prime tourist activity. There is the chance to increase visitor spending, particularly in popular destinations and at visitor attractions, by providing more distinctive, high quality products which reflect the character of different parts or aspects of Turkey, such as traditional handicrafts and jewellery, carpet, rugs, leather and suede items as well as copper and bronze ware, silver goods, ceramics, embroidery articles and the famous Turkish meerschaum and onyx.

Transport

To maximise Turkey's potential as a tourist destination, it must ensure not only that it is accessible to all major visitor markets, but also that it can offer better domestic transport infrastructure.

It is a fact that the transport sector in Turkey is poor and inefficient with bad repercussions on the incoming flow of tourists, who face discomfort travelling within its borders. As far as air transport is concerned, Turkish Airlines should establish a subsidiary charter company of the national carrier. The establishing of such a company, apart from yielding larger profits, would help the Turkish tourist product.

The Natural Environment

One of the biggest challenges facing the industry involves reconciling further development of tourism with conservation of the most precious resource. It would be fair to say that Turkish tourism cannot survive without an intact and healthy natural heritage.

The natural environment is Turkey's number one tourism resource, both in terms of its physical scope and the opportunities it represents. Large areas of the Turkish countryside are relatively unspoilt, there is tremendous potential to attract and interest both the naturalist and the general visitor.

However, this potential may not be fully realised for a number of reasons. There are not enough facilities which promote access to and enjoyment of the countryside. More car parking, picnic areas, viewpoints, information and interpretation are needed. Certain sites may simply not able to sustain large number of visitors without becoming permanently damaged.

There are also opportunities to develop and promote more holiday packages based on the natural environment. A growing interest in the environment and, natural history has given rise to demand for so called 'green holidays'. Turkey has potential to serve this demand. However, this kind of holidays should be well prepared and should not diminish the environment. It is in this sense that there is much to do to promote the concept of sustainable tourism; as it will be a long term effort requiring a major commitment by all concerned.

Training

There is a need for enhancing the skills of those working at all levels in the tourism industry which is critical to its future prosperity. The industry needs skilled managers and staff who can identify and meet the needs of visitors in the face of increasingly fierce international competition. Effective staff recruitment and development are particularly vital.

Account must be taken of the welfare and personal goals of the workforce if the industry is to recruit and retain good quality staff. This means enhancing businesses' recruitment and retention skills; using vocational qualifications to stimulate training by employers; promoting better career opportunities within the industry. Moreover, there is need to stimulate the demand for training both by employers and employees. We must therefore ensure that the available training meets the needs of the industry.

The Ministry of Tourism and the Tourism Development and Education Foundation (TUGEV) have been formulating training programmes for the industry, but at this stage they are not effective. However, we have to recognise that it will take a long term, sustained effort for our industry to adapt to the view that effective human resource development is critical to business performance.

Things To Do

Sports and activities: More and more tourists are looking for things to do. Many now see their holiday as a time for pursuing existing interests or exploring new activities. This is an area of considerable opportunities for Turkey.

Increasing concern for health and fitness, together with more leisure time, has created the demand for holidays which feature, activities and special interests. While Turkey already has a strong potential for sailing, hunting, water sports, there are plenty of opportunities to develop holidays based around a wide range of other activities.

Entertainment and events: The field work identifies lack of entertainment, particularly family entertainment, as a major deficiency in the tourism product. Cultural attractions and events, meanwhile, can play a valuable role in the promotion of tourism and should be better utilised.

The range of possible entertainment is so vast that the solution to Turkey's particular weakness in this area can only realistically lie with individual destinations and businesses. In particular, the industry as a whole needs to make more effort to provide indoor and outdoor facilities for children, and evening entertainment for all visitors.

Turkey has a wealth of cultural attractions which appeal to tourist such as traditional oiled wrestling, and camel-wrestling. These and other events have an important role to play in tourism. Some are capable of drawing additional visitors to Turkey, but more commonly they serve to add colour and diversity to the local tourism product. They help to extend the season and encourage increased expenditure. They are also important promotional tools, since they can help raise the profile of tourism destinations and visitor attractions.

POTENTIAL FUTURE TOURISM ACTIVITIES

Turkey has many potential forms of tourism that have not yet been developed. In order for Turkey to increase the share in the market, it is essential to diversify the activities. The Turkish tourist product must become more competitive and this involves a very wide range of supply, which is unfortunately not available at the moment, at least to the degree it should be.

The types of tourism that are suggested below, might be helpful for Turkey, both in the short and long term. However, it must be stressed that the creation or development of other types of tourism will take time because before marketing and promoting them, the infrastructure facilities must be ready.

Conference and Conventions Tourism

The participants belong to groups of people who travel to a country in order to carry out their research, to study, to exchange views. It is a special form of tourism with much financial impact, which usually takes place in non-peak seasons.

The Turkish tourism sector in last few years has realised the importance of congress tourism. Hotels, which have been opened in recent years, have facilities available for congress organisations. In recent years, Istanbul, in particular, has become a preferred site for organisations wishing to hold congresses and conventions. Apart from Istanbul, long term potential also exists for developing off season incentives breaks to large resort destinations such as Bodrum, Marmaris, Kusadasi, Antalya.

The necessity of developing convention tourism in Turkey is recognised by considering the following factors:

- This special tourist market yields a large financial benefit.

- Turkey is geographically, culturally and climatically very suitable for becoming an international convention centre.

- It is possible to extend the tourist season all year round.

- It can be an opportunity for special promotion and advertisement for Turkey, going further than the classic and traditional established attractions (such as sun, sea, ancient monuments, etc.) for which Turkey is already known.

- For the participant as well as their family, apart from the time actually spent on the convention, there is still time left for relaxation, entertainment and to seeing something new. The financial benefit of such activities in large numbers is, of course, very valuable for the companies involved.

- It gives an opportunity to the participants to have an experience of the place, which they may otherwise have never seen, therefore rising the possibilities of their coming back as ordinary tourists, and moreover advertising the place to their friends and relatives.

However, congress organisation is still not a specified sector in Turkey. The primary problem is the lack of sufficient congress halls. But, this type of tourism is promising, and there is a growing demand to organise congresses in Turkey. As a result, government is particularly encouraging hotels to offer congress facilities.

Marine Tourism

Marine tourism has a lot of potential for development, since 7,100 kilometres of coastal line must certainly be exploited. The continuously increasing demand for cruises and yachting, which have become affordable and popular to a larger part of the market, makes it necessary to speedily improve all the relative support factors of this type of tourism, which yields a high profit.

Turkey is ideal for this type of tourism since it offers the yacht traveller a virtually unlimited choice: he or she can remain at sea cruising, find a secluded bay where he or she can swim and fish, or moor in one of the picturesque harbours and enjoy simple or sophisticated life.

However, it is necessary to build large and fully equipped marinas, as well as create the appropriate infrastructure for all the marine sports, in order to attract the demanding tourists. It is the case that at the moment the number of marinas and other facilities is insufficient for the large demand for marine tourism.

Winter and Mountain Tourism

Turkey should make more efficient use of its locations for mountain and winter tourism. As Ulker (1987) points out that ever more people are escaping each year from the stress of living conditions as a result of rapid industrialisation and urbanisation. It is suggested that there is a need of holidaymaking in the winter as well as the summer season. Therefore, the government has to encourage development of winter sports and mountain tourism. To establish a country as winter resort, however, takes a long time and requires the development of the necessary infrastructure for the winter tourists. It is important to bear in mind that the infrastructure cost for winter and mountain tourism is high, and the season is relatively short, it can create positive contributions to the sector if both public and private sectors co-operate in that respect.

Golf Tourism

Golf tourism is a new phenomenon and is the sport with the most dynamic expansion. Hundreds of golfers travel at different periods of the year in different countries to try new golf courses. According to Federhen (1990), today, in Europe there are about 2 million golf players or interested people. 10% of this number (winter) and 20% of it (summer) travel to the Mediterranean once or twice a year. Over the next 10 years it is expected that the number of golf players will reach 50 million world-wide. Federhan emphasises with a sufficient number of golf areas, infrastructure, and an acceptable pricing policy, Turkey could take 25-30% of this market.

Turkey, however, has not developed golf courses to utilise this potential so far. There is only one (9-hole) golf course in Turkey at the moment, in Istanbul. The creation of golf courses will help diversity Turkish tourism both quantitatively and qualitatively. Moreover, the golf courses can also be utilised for citizens.

Health And Spa Tourism

The country has approximately 1,300 thermal springs spread throughout western Anatolia. According to Simsek (1991) Turkey has the thermal source potential that can give services to one million people per day. Therefore, through thermal springs in Turkey, it might be possible to extend the tourism season in tourism development regions, to increase the occupancy rates in tourism establishments. Outside tourism development areas, on the other hand, it may be possible to create new income sources and employment opportunities, and to move the intensified demand in sea-side resorts to inner regions, therefore, contributing to reduce regional imbalances.

In conclusion, the development of alternative types of tourism is crucial for the Turkish tourist product, because it exploits the potential of Turkey by providing a basis for all year round tourism, therefore increasing the competitiveness of the product and boosting the Turkish image. Apart from the above mentioned types of tourism, others, perhaps of lesser importance can also be developed and with effective planning for appropriate infrastructure in the future, they can be benefit the economy too.

The Future

Turkey like most Mediterranean countries, is expected to face increased tourist demand in the future. Whether the Turkey tourist market will be able to meet and take advantage of this increased demand will depend on how the whole complex of the constituent enterprises as well as the competent public agencies are going to cope with the problems of the present and take the necessary steps to meet the challenges of the future. Therefore there must be significant improvements if Turkey is to compete successfully as an international tourism destination, and if tourism is to retain and improve its position as an important national generator of income and employment.

The future effort of the Ministry of Tourism and the Turkish private sector should focus on the development of the quality and range of services offered. In addition, all future tourism projects should have the appropriate capacity and the range of facilities that will allow their coexistence without affecting the natural, social, cultural and economic environment. In so doing, the greater natural beauty of Turkey will be preserved for posterity and holidaymakers may continue to enjoy activity based leisure time both in and out of season.

For successful future tourism, Turkish tourism needs better facilities, better marketing and better training. Marketing and promotional activities will be indispensable if Turkish tourism is to survive the keen competition of established and emerging tourist-receiving countries. It may be said that Turkish tourism will not grow unless the more money is devoted to marketing.

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Chapter Nine

Conclusion

INTRODUCTION

In Chapter one, several research objectives were introduced which have been used to guide the direction of the study. The answers to and the findings associated with these objectives have been presented in Chapters six and seven. This chapter will discuss the contributions of the research and also provides some recommendations to overcome the identified problems. Moreover, the chapter notes the limitations of the study and also offers some suggestion for future research.

CONTRIBUTIONS OF THE STUDY

In general, this study is thought to make some contribution to the literature of tourism marketing as the study has extensively and comprehensively discussed the application of the marketing mix elements, i.e. product, price, distribution and promotion. It also offers useful information to all tourism bodies, i.e. travel trade, the supplier of tourism services, the Turkish tourism organisations and the British tour operators offering Turkey as a tourist destination.

The research also provides useful empirical data and information to enable the marketers of Turkey as an international tourist destination to see certain areas for improvement in order to maintain and/or increase their customers' satisfaction.

Moreover, both the Turkish tourism organisations and British tour operators can gain a better insight of the tourists who visit Turkey, why they visited the country, and their experiences of it.

Furthermore the opinions, suggestions and recommendations of British tour operators and tourists can be important help to the Turkish tourism organisations in designing appropriate marketing policies.

RECOMMENDATIONS

The British tourists evaluated Turkey very favourable on good weather; warm, friendly attitude of the people; plenty to do and see and clean beaches. For Turkish and British tourism marketers, those tourists attracting features should be used. However, these elements are probably stressed more or less in the same way in the other competitive Mediterranean countries. Hence as previously argued, destination image is a very important component of a destination's tourism product. Turkey has to try to build its image around the unique aspects such as its historical heritage over a span of ten millennia, geographical location as a bridge between the two continents, Europe and Asia, variety of landscape, coasts being the cleanest in the Mediterranean, famous cuisine and blend of Eastern and Western atmosphere that can give her a competitive advantage.

The Ministry of Tourism with the help of other Turkish tourism organisations can prepare effective promotion targeting specific messages to segmented markets through specific media. Besides the top four motivational factors of good weather; warm, friendly attitude of the people; plenty to do and see and clean beaches, other type of motivational message such as the Anatolian way of life in the villages, the traditional festivals and sport events should be focused.

As the research findings showed, British charter airlines and British Airways control a large part of the tourist flows from the UK to Turkey at present. This means substantial lost revenues for the Turkish economy. It also means that the successful future of Turkish tourism in the British market depends on, to some extent, willingness and initiative of British carriers and major tour operators in the UK.

With the purpose of increasing the number of tourists using Turkish carriers, Turkish carriers and hoteliers can be jointly establish multi-purpose office in the main cities in the UK. Such offices would act as a travel agent and tour operators for Turkish carriers and hotels. The joint ownership of such offices would prevent repetition of efforts and expenses committed by independent airlines or hotels.

The findings in the tourist survey reveal that promotional literature supplied by the Turkish Information Office in London was not satisfactory. However decisions of actual and potential visitors depend to a large extent on the brochures, catalogues and guides about the country. Hence those materials need to be increased for different types of tourism, and distributed widely enough to reach the targeted number of consumers and travel trade.

From the tour operator survey, it was found that there are no great promotional efforts directed towards the tour operators to sustain the continuity of relations between UK tour operators and Turkish tourism organisations. In order to maintain these relations there is a need for the Turkish tourism organisations to be more co-operative and flexible with the tour operators in the UK. Since it is likely that tour operators and travel agents will continue to be the primary agents in holiday selling channels, there is very little chance for Turkey to bypass them.

The nature of co-operation can be in different forms: First of all, more information on tourist attractions in Turkey, tour plans, availability of accommodation and other tourist services and facilities can be provided. For this purpose a tourism guide book for tour operators, which can be updated yearly, can be prepared and distributed to British tour operators and other tour operators who are arranging holidays to Turkey.

Secondly, familiarisation tours to Turkey for large tour operators' employees at all levels can be organised. This type of activities enable tour operators' employees to have more suitable information on Turkey as an international tourist destination. Moreover they may also provide incentives to promote Turkey more vigorously.

Thirdly, Turkish tourism organisations can share some of the promotion costs of tour operators directly related to Turkey. For instance, the cost of preparing tour brochures on Turkey can be shared.

In order to increase awareness of the destination, a campaign "Visit Turkey Year 2000" can be introduced by The Ministry of Tourism with the help of other Turkish tourism organisations. The campaign could be instrumental in increasing the popularity of Turkey. This promotion can be a year of celebration of festivals, exhibitions, sports and colourful traditions.

This campaign can be beneficial in many ways:

- It can help to promote Turkey as an attractive tourist destination to countries identified as potential market areas,
- It can increase the number of tourists to Turkey,
- It can increase tourists length of stay and per capita expenditure in order to enhance foreign exchange earnings from the tourism sector,
- It can promote and popularise culture and art activities in the country,
- It can promote domestic tourism through creating greater awareness among the Turkish of the country's tourist destinations,
- It can help in shifting part of the demand towards off-peak season.

In connection with "Visit Turkey Year 2000" with the purpose of attracting foreigners to Turkey, a number of special offers can be made. For instance, discount cards for transportation; low cost domestic air travel. This can make Turkey an even lower cost destination that it would normally be.

As a concluding note, if Turkey wants to develop tourism and to attract more tourists including repeat visitors, it must study the tourist market and learn to understand what tourists really want and need. Therefore, there is a need for the Turkish government to look at other countries and regions, especially Mediterranean countries, and compare their experiences in their marketing activities.

LIMITATION OF THE STUDY

During the research there were a number of limitations. Firstly, data for the tour operator study were collected through a postal questionnaire. Because of time and cost limitation, personal interviews with tour operator managers were not conducted. Such interviews might have been useful to get a better insight of the problems and prospects for tourism in Turkey.

Secondly, due to the lengthy questionnaires, possible sample fatigue in the survey might have impacted on the accuracy of the data.

Thirdly, according to time and cost limitations, the tourist survey covered only British tourists. If their image of Turkey, their decisions to visit it, ways or arranging the visit, and their experiences (i.e. satisfaction or dissatisfaction) are similar to other European customers of Turkey, the results of the study can be generalised to all European customers of the country. However, sampling of these countries would be necessary to confirm this.

SUGGESTION FOR FUTURE RESEARCH

A replication of this study can be done in the main European countries - especially for Germany and France which are the first and third tourist generating countries to Turkey respectively, - in order to examine:

1. Whether the pattern of tour operators in marketing Turkey as an international tourist destination to their customers is similar to or different from that of British tour operators promoting visits to it. As a result of such information, it would be possible for the Turkish tourism organisations to develop the appropriate policies which suit each market.

2. Whether the image of European visitors about Turkey, their attitudes towards it, and their experience with it is similar to or different from those British tourists. Accordingly such information would be assist in designing and offering the appropriate product. Moreover this kind information can be crucial to the tourism success of the destination.

Appendix 1 Address of the UK Tour Operators

AIRTOURS TURKEY
WAVELL HOUSE, HOLCOMBE RD.,
HELMSHORE, ROSSENDALE,
LANCASHIRE, BB4 4NB

ALTERNATIVE TRAVEL
127 KINGSLAND HIGH STREET,
LONDON, E8 2PB

ANATOLIAN SKY HOLIDAYS
IMEX HOUSE, 52 BLUCHER STREET,
BIRMINGHAM, B1 1QU

ASPIRATION HOLIDAYS
16-18 PETERSHAM ROAD,
RICHMOND, SURREY, TW10 6UW

AFLOAT IN TURKEY
35 FAIRFAX PLACE,
LONDON, NW6 4EJ

A T MAY CITY BREAKS
UNIT B (2) BLAIR COURT,
CLYDEBANK BUSINESS PARK,
CLYDEBANK, G81 2LA

BAKHUS TOURISM
BAKHUS HOUSE, MURDOCK ROAD,
BICESTER, OXON, OX6 7PP

BALKAN HOLIDAY
SOFIA HOUSE, 19 CONDUIT STREET,
LONDON, W1P 7HA

BEACH VILLAS HOLIDAYS
8 MARKET PASSAGE,
CAMBRIDGE, CAMBS, CB2 3QR

BOSPHORUS HOLIDAYS
28 MADDOX STREET.
LONDON, W1R 9PF

B'EAST SAILING
P O BOX 85, FORDOR HOUSE,
45 NORTH ROAD, RICHMOND,
SURREY, TW9 4HL

BRITISH AIRWAYS HOLIDAYS
ASTRAL TOWERS. BETTS WAY,
LONDON ROAD, CRAWLEY,
WEST SUSSEX, RH10 2XA

BRITISH MUSEUM TOURS
46 BLOOMSBURG STREET,
LONDON, WC1B 3QQ

CRESTA HOLIDAYS
CRESTA HOUSE,
32 VICTORIA STREET. ALTRINCHAM,
CHESHIRE. WA14 1ET

CAMPER AND NICHOLSONS
25 BRUTON STREET,
LONDON, W1X 7DB

CARTE BLANCHE INTERNATIONAL
27 ALBERT SQUARE.
LONDON, SW8 1DA

COSMOS YACHTING
77 LONDON ROAD. KINGSTON,
SURREY, KT2 6ND

CRYSTAL HOLIDAYS
THE COURTYARD.
ARLINGTON ROAD, SURBITON, SURREY, KT6 6BW

CRESTAR YACHT CHARTERS
COLETTE COURT,
125 SLOANE STREET,
LONDON, SW1X 9AU

CRUSADER YACHTING
C/BOX FARM OFFICE.
WINKFIELD ROW, BRACKNELL,
BERKSHIRE RG12 6NG

C TA HOLIDAYS
41 PALL MALL
LONDON, SW1Y 5JG

CAPPADOCIA TRAVEL
38 BALLS POND ROAD.
HACKNEY, LONDON

CELEBRITY HOLIDAYS AND TRAVEL
18 FRITH STREET,
LONDON, WIV 5TS

CLUB MED
106-110 BROMPTON ROAD.
LONDON

CLUB TURKEY
KING'S HOUSE, 25 KING'S ROAD,
CHELSEA
LONDON, SW3 4RP

CLUB VILLA SOL
42 HIGH STREET,
NEWCASTLE UNDER LYME,
STAFFORDSHIRE, ST5 1QL

CONCEPT EXPRESS
19 ALBEMARLE STEET,
LONDON, W1X 3HA

COSMOS
TOURAMA HOUSE,
17 HOMESDALE ROAD,
BROMLEY, KENT, BR2 9LX

CRICKETERS HOLIDAYS
4 THE WHITE HOUSE,
BEACON ROAD, CROWBOROUGH,
EAST SUSSEX, TN6 1AB

DAYDREAMS
30 BEDFORD PLACE,
LONDON, WC1B 5JH

DISCOVERY
41 NORTH END ROAD,
WEST KENSINGTON,
LONDON, W14 85Z

EUROPEAN TRAVEL
GLASS UNIT UPPER FLOOR,
ELEPHANT & CASTLE SHOPPING C.,
LONDON, SE1 6TE

EXPLORE WORLDWIDE
1 FREDERIC STREET,
ALDERSHOT,
HANTS GU11 1LQ

FELLOWSHIP TOURS
MANOR HOUSE, SOUTH CHARD,
SOMERSET, TA20 2PN

FREESPIRIT GO TURKEY
GROUNDSTAR HOUSE,
LONDON ROAD,CRAWLEY
WEST SUSSEX. RH10 2TB

H20 HOLIDAYS LTD
3 TRAFALGAR GATE,
BRIGHTON MARINA, BRIGHTON.
SUSSEX, BN2 5UY

HIGHWAY HOLIDAYS
3 WINCHESTER STREET,
WHITCHURCH,
HANTS, RG28 7AH

GO AS YOU PLEASE
SCOPE HOUSE, HOSPITAL ROAD,
MORETON IN MARSH,
GLOS, GL56 0BQ

HANNA DESJARDINS INT
22 BLENHEIM TERRACE,
ST. JOHN'S WOOD,
LONDON, NW8 0EB

ILIOS ISLAND HOLIDAYS
18 MARKET SQUARE, HORSHAM,
WEST SUSSEX, RH12 1EU

INTRA TRAVEL
44 MAPLE STREET,
LONDON, W1P 5GD

MED CHOICE
CHESHAM HOUSE,
150 REGENT STREET,
LONDON, W1R 6BB

MARTIN RANALL TRAVEL
10 BARLEY MOW PASSAGE,
CHISWICK, LONDON, W4 4PH

DIRECT HOLIDAYS
HALLIBURTON HOUSE,
5 PUTNEY BRIDGE APPROACH,
LONDON, SW6 3JD

DIVE AND SAIL
NASTFIELD COTTAGE, THE GREEN.
FRAMPTON ON SEVERN, GLOS, GL2 7DY

ECLIPSE DIRECT
ASTRAL TOWERS
BETTS WAY, CRAWLEY,
WEST SUSSEX, RH10 2GX

EXODUS EXPEDITIONS
9 WEIR ROAD,
LONDON, SW12 OLT

FIRST CLUB HOLIDAYS
173 UXBRIDGE ROAD,
HANWELL,
LONDON, W7 3TH

GULLIVERS NATURAL HISTORY HOLIDAYS
OAK FARM, STOKE HAMMOND,
MILTON KEYNES, BUCKS, MK17 9DB

GREEN ISLAND HOLIDAYS
95 MORTIMER STEET,
LONDON, W1N 7TA

HOLIDAYS BY DESIGN
13 OXFORD CIRCUS AVENUE.
231 OXFORD STEET.
LONDON, W1R 1AD

HOLTS BATTLEFIELDS TOURS
GOLDEN KEY BUILDING.
15 MARKET STREET, SANDWICH,
KENT, CT13 9DA

INSIGHT HOLIDAYS
26-28 PARADISE ROAD, RICHMOND.
SURREY, TW9 1BL

INTER CHURCH TRAVEL
MIDDELBURG SQUARE,
FOLKESTONE.
KENT, CT20 1BL

INSPIRATIONS HOLIDAYS
VICTORIA HOUSE, VICTORIA ROAD.
HORLEY, SURREY, RH6 7AD

MANOS HOLIDAYS
168-172 OLD STREET,
LONDON, EC1V 9BP

METAK HOLIDAYS
70 WELBECK STREET,
LONDON, W1M 7HA

MCCABE TRAVEL
53-55 BALHAM HILL,
LONDON, SW12 9DR

MCCULLOCH YACHT CHARTER
NUMBER FIVE, 32 FAIRFIELD ROAD,
LONDON, E3 2QB

MOSAIC HOLIDAYS
PATMAN HOUSE, GEORGE LANE
SOUT WOODFORD, LONDON, E18 2LS

NAUTILUS YACHTING
42 CROYDON ROAD, CATERHAM,
SURREY, CR3 6QB

NATURETREK
CHAUTARA, BIGHTON,
NR. ALRESFORD, HAMPSHIRE, SO24 9RB

OSPREY HOLIDAYS
BROUGHTON MARKET
EDINBURGH, EH3 6NU

OTHELLO TRAVEL
34 SHACKLEWELL LANE
DALSTON, LONDON, E8 2EZ

PECKHAM TRAVEL
30 BARGAIN CENTRE,
48 RYE LANE, LONDON SE15 5BZ

PORTLAND HOLIDAYS
218 GREAT PORTLAND STREET,
LONDON, W1N 5HG

PROSPECT MUSIC AND ART TOURS
454-458 CHISWICK HIGH ROAD,
LONDON, W4 5TT

PRESIDENT HOLIDAYS
542 KINGSLAND ROAD,
DALSTON, LONDON, E8 4AH

RAMBLERS HOLIDAYS
BOX 43, WELWYN GARDEN,
HERTS AL8 6PQ

RAYMOND COOK HOLIDAYS
BEDFORDIA HOUSE,
PREBEND STREET, BEDFORD, BEDS. MK40 1QG

REGENT HOLIDAYS
REGENT HOUSE, 31A HIGH STREET,
SHANKLIN,
ISLE OF WIGHT, PO37 65W

RELIANCE HOLIDAYS
1ST FLOOR, ASTORIA HOUSE,
62 SHAFTESBURY AVENUE,
LONDON, W1V 7AA

SAGE HOLIDAYS
SAGE BUILDING,
MIDDELBURG SQUARE,
FOLKESTONE. KENT, CT20 1AZ

SKI TURKEY
KING'S HOUSE, 25 KING'S ROAD,
CHELSEA,
LONDON, SW3 4RP

SAI TRAVEL
12 WESTOW HILL, UPPER NORWOOD
CRYSTAL PALACE,
LONDON, SE19 1RX

SAMSON HOLIDAYS AND TOURS
487A GREEN LANES,
HARINGEY,
LONDON, N4 1AJ

SAVILE ROW TOURS AND TRAVEL
39 SAVILE ROW,
LONDON, W1X 1AG

SERIOUSLY TURKEY HOLIDAYS
ENTERPRISE CENTRE,
11 DUKE CLOSE, ANDOVER, HANTS, SP10 5AP

SIMPLY TURKEY
CHISWICK GATE,
598-608 CHISWICK HIGH ROAD,
CHISWICK LONDON, W4 5RT

SOVEREIGN
ASTRAL TOWERS, BETTS WAY,
CRAWLEY,
WEST SUSSEX, RH10 2TB

SUNQUEST HOLIDAYS
23 PRINCES STREET,
LONDON, W1R 7RG

SUNSET HOLIDAYS
MANCHESTER ROAD.
KEARSLEY, BOLTON, LANCS. BL4 8RT

SUNTAN HOLIDAYS & S T TRAVEL
5 CROSSWAYS PARADE,
PERTH ROAD, WOODGREEN,
LONDON, N22 SQX

SUNTOURS
65 NEWMAN STREET,
LONDON, W1P 3PG

SHERPA EXPEDITIONS
131 a HESTON ROAD, HOUNSLOW,
MIDDLESEX, TW5 0RD

SUNSHINE CHARTERS
GREENFIELD HOUSE,
DOWLANDS LANE, COPTHORNE,
WEST SUSSEX, RH10 3HX

SUNSAIL
THE PORT HOUSE, PORT SOLENT,
PORTSMOUTH, HAMPSHIRE, PO6 4TH

SWAN HELLENIC
77 NEW OXFORD STREET,
LONDON, WC1A 1PP

SUNWORLD
29/31 ELMFIELD ROAD,
BROMLEY, KENT, BR1 1LT

TAPESTRY HOLIDAYS
24 CHISWICK HIGH ROAD,
LONDON, W4 1T4

TEMPLECRAFT YACHT CHARTERS
33 GRAND PARADE,
BRIGHTON, BN2 2QA

THOMSON TOUR OPERATIONS
GREATER LONDON HOUSE,
HAMPSTEAD ROAD,
LONDON, NW1 7SD

TOP YACHT CHARTER
ANDREW HILL LANE, HEDGERLEY,
BUCKS, SL2 3UW

THE MOORINGS MARINAIR YACHT CHARTER
188 NORTHDOWN ROAD,
CLIFTONVILLE, KENT, CT9 2QN

THE IMAGINATIVE TRAVELLER
14 BARLEY MOW PASSAGE.
CHISWICK, LONDON, W4 4PH

TRAVELBOUND
OLIVIER HOUSE,
18 MARINE PARADE, BRIGHTON,
EAST SUSSEX, BN2 1TL

TREASURES OF TURKEY
49 ENGEL PARK,
LONDON NW7 2HE

TREK TRAVEL
8 THE GRANGE. ELMDON PARK,
SOLIHULL,
WEST MIDLANDS, B92 9EL

U K CONNECTION
DEEPDENE LODGE,
DEEPDENE AVENUE, DORKING,
SURREY RH5 4AZ

VILLMAR HOLIDAYS
99 MARYLEBONE HIGH STREET,
LONDON, W1M 3DD

WINDSURF BITEZ
30 BRACKENBURY ROAD,
LONDON, W6 0BA

T K AIR TRAVEL
46 NEWINGTON GREEN,
LONDON, N16 9PX

TEMPLE WORLD TOURS
13 THE AVENUE,
KEW, RICHMOND SURREY, TW9 2AL

TIME OFF
CHESTER CLOSE, CHESTER STREET,
LONDON SW1X 7BQ

TOP DECK TRAVEL
131-135 EARLS COURT ROAD,
LONDON, SW5 9RH

TRANTUR UK
2 OAK COTTAGES, THE GREEN,
COLDRED, DOVER, KENT, CT15 5AN

THE TRAVEL TRADING COMPANY
TROFARTH. CLWYD,
WALES, LL22 8BW

THE TRAVEL ALTERNATIVE
27 PARK END STREET.
OXFORD, OX1 1HU

TRAVELSCENE
11-15 ST. ANN'S ROAD, HARROW,
MIDDLESEX, HA1 1AS

TULIP TRAVEL
67-71 OXFORD STREET.
LONDON, W1R 1RD

TURKEY AND BEYOND
29 MARLEBONE ROAD
LONDON, NW1 5JX

U K EXPRESS
WHITEHALL HOUSE.
41 WHITEHALL, LONDON, SW1A 2BY

VIAMARE TRAVEL
GRAPHIC HOUSE, 2 SUMATRA ROAD,
LONDON, NW6 1PU

WORLDWIDE CHRISTIAN TRAVEL
50 COLDHARBOUR ROAD,
REDLAND, BRISTOL. AVON, BS6 7NA

UNIVERSITY OF STRATHCLYDE

Ref:CLJ/JF

2 May 1995

TO WHOM IT MAY CONCERN

One of our Turkish doctoral students, Mr. Yuksel OZTURK, is carrying out his research on "Marketing Turkey as a tourist destination in the United Kingdom".

The initial part of his project involves a brief questionnaire to those tour operator companies in the United Kingdom who are selling Turkey as a tourist destination. As your company is one of the these we hope that you will find it possible to complete and return the questionnaire. A stamped self-addressed return envelope is provided. We assure you that all information and comments received will be regarded as confidential. Finally, if you would like to have a copy of the research results, these will be available when the project is completed.

If any further information is required about this student, or his studies, I can be contacted at the undernoted address.

Your faithfully

Professor C.L.JENKINS

QUESTIONNAIRE FOR THE UK TOUR OPERATORS WHO ARE SELLING TURKEY AS A TOURIST DESTINATION

We are grateful if you would answer the following questions. Thank you very much for your time.

1. How would you describe your current knowledge about Turkey as a tourist destination? (Please circle the number that best describes you opinion.)

Very little	→	→	Very great extent	
1	2	3	4	5

2. For how long have you been selling Turkey as a tourist destination?
(Please write in):_____ year(s).

3. How many times have anyone in your company visited Turkey during the last five years? (Please write in) : ______ time(s).

4. Among the tourist destination countries offered by your company, how important is Turkey to your company? (Please circle the number that best describes you opinion.)

Not important →		→	Essential	
1	2	3	4	5

5. What proportion of your company's total business depends on Turkey as a tourist destination? (Please tick one box below.)

- ☐ Less than 10%
- ☐ 10-15%
- ☐ 16-20%
- ☐ 21-25%
- ☐ 26-30%
- ☐ 30% and over.

6. Which of the following reasons are most likely used by the British tourists to visit Turkey? (Please tick *all* that apply.)

- ☐ Vacation/holiday
- ☐ Business
- ☐ Attend convention/conference
- ☐ Visit historic places
- ☐ Being at the seaside (Sunny beaches)
- ☐ Health and spa treatment
- ☐ Shopping
- ☐ Good weather
- ☐ Religion
- ☐ Plenty to do and see
- ☐ Value for money
- ☐ Fashionable destination
- ☐ Other (Please specify)_____________.

7.A In your view, are Turkey's main attractions and tourist facilities sufficiently developed to meet the needs of the British tourists? (Please tick that apply.)

	Yes	No	Don't know
a. Attraction	☐	☐	☐
b. Facilities	☐	☐	☐

7.B If No what major improvements need to be made? (Please write in)

a.Attraction:____

____

____

____.

b.Facilities:____

____

____

____.

8. How do you find the price of the following Turkish tourist services? (Please circle the number that best describe your opinions.)

Services	*Very poor value* →	→	→		*Very good value*
♦ Air flight to Turkey	1	2	3	4	5
♦ Flight within destination	1	2	3	4	5
♦ Accommodation	1	2	3	4	5
♦ Local transportation	1	2	3	4	5
♦ Food and drinks	1	2	3	4	5
♦ Excursions	1	2	3	4	5
♦ Package tour to destination	1	2	3	4	5
♦ Shopping	1	2	3	4	5
♦ Entertainment	1	2	3	4	5

9.A How would you describe the relations between your agency and Turkish tourism organisations? (Please circle the number that apply.)

	Very weak	→		→Very strong	
♦ Ministry of Tourism	1	2	3	4	5
♦ Tourism Office in London	1	2	3	4	5
♦ Turkish Airline	1	2	3	4	5
♦ Hotels	1	2	3	4	5
♦ Tourism Firms	1	2	3	4	5
♦ Travel Agencies	1	2	3	4	5

9.B If any are weak, can you please suggest ways to improve those relations? (Please write in.)

a. Ministry of Tourism:______________________________________

____

____.

b. Tourist office in London:____
____
____.

c. Turkish Airline:____
____
____.

d.Hotels:____
____
____.

e. Tourism Firms:____
____
____.

f. Travel Agencies:____
____
____.

10. Are you receiving funds for your promotional efforts from the following Turkish organisations? (Please tick that apply.)

Organisations	Never	Once a year	Twice a year	3 times a year	>3 times a year
Ministry of Tourism					
Tourist office in London					
Turkish Airlines					
Turkish hotels					
Travel agencies					

11. Have you been involved in any of the following promotional activities? (Please tick ***all*** that apply.)

- ☐ Educational tours (to inspect Turkey's tourist facilities and attractions)
- ☐ Tourism Workshops
- ☐ Calls on your agency by Turkish sales representatives
- ☐ Direct mailing of tourist literature
- ☐ Newsletters
- ☐ National Weeks and Evenings
- ☐ Other (Please specify)__________________.

12. Which airlines do you most frequently use to sell holidays to Turkey?

- ☐ Turkish Airlines
- ☐ British Airlines
- ☐ Other (Please specify)__________________.

13. What percentage of all inclusive tours you sold to Turkey in 1994 used a Turkish air carrier?

------%.

14. Are you selling Turkey as a:

☐ Summer destination. Between:________________.

☐ Winter destination. Between:________________.

☐ Whole year round destination.

15. How many inclusive holidays to Turkey did your company sell in 1994?

______________.

16. How many independent travellers to Turkey booked their travel through your company in 1994?

______________.

17. Do you think that your company's inclusive tour sales to Turkey will increase in the next five years?

☐ Yes ☐ No ☐ Don't know

18. Which of the following factors are the most important, when selling an inclusive tour to Turkey? (Please circle the number that best describes your opinion)

Factor	*Not Important→*	*→*		*Essential*	
♦ Accessibility	1	2	3	4	5
♦ Availability of suitable accommodation	1	2	3	4	5
♦ Cost of the tour	1	2	3	4	5
♦ Behaviour of local people towards tourists	1	2	3	4	5
♦ Climate and weather	1	2	3	4	5
♦ Social and political stability	1	2	3	4	5
♦ Shopping facilities	1	2	3	4	5
♦ Entertainment facilities	1	2	3	4	5
♦ Clean beaches	1	2	3	4	5
♦ Image of the host country	1	2	3	4	5
♦ Cultural and historical attractions	1	2	3	4	5
♦ Other (Please specify)______________.	1	2	3	4	5

19. What are the main complaints reported by your clients after their holidays in Turkey?

____

____

____

____.

20. What are the most difficult problems you face in selling holidays to Turkey?

____

____

____

____.

21. What are the best features of holiday in Turkey reported by your clients?

____
____
____
____.

22. Would you describe your company as :

- ☐ Tour operation only
- ☐ Primarily tour operation and some travel agency activities
- ☐ Primarily travel agency and some tour operator activities
- ☐ Other (Please specify)__________________.

23. Besides this office, does your company have any other branches in UK?

☐ Yes ☐ No

If yes number of the branch:_______.

24. How large is your organisation in:

1. No. of employees : ____________.
2. Annual sales turnover : ____________.

25. We would appreciate any comments or suggestions to improve the tourism industry of Turkey. (Please write your comments below):

____
____
____
____
____
____
____
____
____
____
____
____
____
____
____
____
____
____.

Thank you very much for replying to this questionnaire. The research will not be achieved without your contribution.

UNIVERSITY OF
STRATHCLYDE THE SCOTTISH
HOTEL SCHOOL
CURRENT BUILDING
94 CATHEDRAL STREET
GLASGOW G4 OLG

30, May, 1995

Dear Sir/Madam;

I refer to my recent questionnaire for which I could not receive a response from you.

I would be most grateful if you could fill in and return the questionnaire as soon as possible. If you already have been sent it, please ignore this letter and thank you for your co-operation.

Yours faithfully

Yüksel ÖZTÜRK

QUESTIONNAIRE FOR THE BRITISH TOURISTS

SECTION 1: TRIP CHARACTERISTICS

Please complete this section on your trip characteristics about your visit to Turkey.

1. How many times have you visited Turkey during the last five years?

☐ First time	☐ Four times
☐ Twice	☐ Five times
☐ Three times	☐ Six and over

2. What are the main purposes of your current trip? (Check all if apply)

☐ Holiday/vacation	☐ Health and spa treatment
☐ Business	☐ Religion
☐ Visit relatives and friends	☐ Mainly shopping
☐ Culture	☐ Study/Education/Training
☐ Meeting/conventions	☐ Other (please specify)____________.

3. Please identify how **IMPORTANT** the following factors were in deciding to visit Turkey? (Please circle the number that best describes your opinion)(Please answers all).

	Not important at all →		→	→	Essential
♦ Simply for reasons of curiosity	1	2	3	4	5
♦ Visit historic place (Old civilisation)	1	2	3	4	5
♦ Good Weather/Being on the seaside	1	2	3	4	5
♦ Adventure	1	2	3	4	5
♦ Warm, friendly people	1	2	3	4	5
♦ Plenty to do and see	1	2	3	4	5
♦ Comfortable accommodation	1	2	3	4	5
♦ Feeling of personal security	1	2	3	4	5
♦ To take a bargain priced vacation	1	2	3	4	5
♦ To go to a newly fashionable destination	1	2	3	4	5
♦ To enjoy a different taste and cuisine	1	2	3	4	5
♦ Clean beaches	1	2	3	4	5
♦ Range of water sports	1	2	3	4	5
♦ Suitable for family vacation	1	2	3	4	5
♦ Other (please specify)____________.	1	2	3	4	5

4. What was the planning time involved in this trip? (Please tick one category.)

☐ Less than one week	☐ 3-4 week	☐ 3-4 month
☐ 1-2 week	☐ 1-2 month	☐ Over 4 month

5. Which airline did you fly on? (Please tick one box below.)

☐ Turkish Airline	☐ British Airline
☐ Charter flight by tour operators	☐ Other (please specify)___________.

6. Why did you choose this particular airline? (please tick all that apply.)

- ☐ To support national airline
- ☐ Previous experience
- ☐ Recommended by travel agent
- ☐ Recommended by friends/ relatives
- ☐ Attracted by advertisements
- ☐ Offer special discounts
- ☐ Part of inclusive tour (did not choose airline personally)
- ☐ Other (please specify)_____________.

7. From what sources did you get information to realise this trip? (Check **all** that apply.)

- ☐ Travel agencies
- ☐ Recommended by friends and relatives
- ☐ Previous experience
- ☐ Published sources (e.g. guidebooks)
- ☐ Turkish Information Bureau in London
- ☐ Newspapers/travel magazine
- ☐ Radio/TV advertising
- ☐ Other (please specify)______________.

8. How did you make your travel arrangement for this trip?

- ☐ Package holiday booked through travel agent
- ☐ Package holiday booked direct from tour operator
- ☐ Independent holiday booked through travel agent
- ☐ Independent holiday from airline.

9. With whom are your travelling? (please tick one box below.)

- ☐ Alone
- ☐ Friends
- ☐ Partner
- ☐ Tour group
- ☐ Partner and children
- ☐ Business associates
- ☐ Other family member
- ☐ Other (please specify)___________.

10. A. Number of days you intend to be away from your home country:______ days
B. Number of days in Turkey: _______ days.

11. Please list the places (cities/towns) visited, and indicate the number of nights at each place. Under the section for type of lodging, please check (✓) for the type of lodging used/plan to use. If you did/will not stay overnight at a place visited, enter "0" under "Number of Nights".

		Type of Lodging					
Destinations Visited	Number of Nights	Hotel Motel	Holiday Village	Hostels	Camp Caravan	Rental House	Other
1.							
2.							
3.							
4.							
5.							
6.							

12. What type of transportation(s) did you use while visiting the above places? (Check **all** that apply.)

- ☐ Airplanes
- ☐ Taxi
- ☐ Coach (package)
- ☐ Public Buses
- ☐ Private/own auto
- ☐ Rail
- ☐ Rented auto
- ☐ Other (Please specify)___________.

13. While in this country which of the following sources of information have helped in your visit to the tourist attractions (Please circle the number that best describes your opinion).

	Very Bad →		→	Excellent		Don't know
♦ Own experience (been there before)	1	2	3	4	5	6
♦ Recommendation of friends/relatives	1	2	3	4	5	6
♦ Local travel agencies/tourist firms	1	2	3	4	5	6
♦ Representatives of British tour operators travel agents and their local branches	1	2	3	4	5	6
♦ Local tourist information centres	1	2	3	4	5	6
♦ Hotels, Railway stations, staff	1	2	3	4	5	6
♦ Other (please specify)________.	1	2	3	4	5	6

SECTION 2: ASSESSMENT OF TRIP

14. Please indicate HOW SATISFIED you were with the following aspects of your holiday in Turkey? (Please answer ***all*** and circle the number that best describes your opinion).

A. Your Accommodation(s)	Dissatisfied	→	→	Very Satisfied		Don't know
♦ Modernity of rooms	1	2	3	4	5	6
♦ Toilet/shower facilities	1	2	3	4	5	6
♦ Quality of food and drinks	1	2	3	4	5	6
♦ Cleanliness	1	2	3	4	5	6
♦ Efficiency of service	1	2	3	4	5	6
♦ Friendliness of staff	1	2	3	4	5	6
♦ Overall value of money	1	2	3	4	5	6
♦ Entertainment	1	2	3	4	5	6
♦ Indoor recreational facilities	1	2	3	4	5	6
♦ Other (please specify)___________.	1	2	3	4	5	6

B. Local Services	Dissatisfied	→	→	Very	Satisfied	Don't know
♦ Airport service (Immigration)	1	2	3	4	5	6
♦ Airport service (Custom)	1	2	3	4	5	6
♦ Entertainment and recreational facilities	1	2	3	4	5	6
♦ Restaurants	1	2	3	4	5	6
♦ Banking services	1	2	3	4	5	6
♦ Shopping facilities	1	2	3	4	5	6
♦ Facilities offered at tourist centres	1	2	3	4	5	6
♦ Attitude of taxi drivers	1	2	3	4	5	6
♦ Personal security	1	2	3	4	5	6
♦ Attitude of local people	1	2	3	4	5	6
♦ Hygiene and sanitation	1	2	3	4	5	6
♦ Quality of travelling roads	1	2	3	4	5	6

C. Attractions	Dissatisfied	→	→	Very	Satisfied	Don't know
♦ Beach resort	1	2	3	4	5	6
♦ Historical interest	1	2	3	4	5	6
♦ Architecture	1	2	3	4	5	6
♦ Night life	1	2	3	4	5	6
♦ City tour	1	2	3	4	5	6
♦ Cultural show	1	2	3	4	5	6
♦ Water sport facilities	1	2	3	4	5	6

D. Price Level	Dissatisfied	→	→	Very	Satisfied	Don't know
♦ Air flight to Turkey	1	2	3	4	5	6
♦ Flight within destination	1	2	3	4	5	6
♦ Accommodation	1	2	3	4	5	6
♦ Local transportation	1	2	3	4	5	6
♦ Food and drinks	1	2	3	4	5	6
♦ Excursions	1	2	3	4	5	6
♦ Package tour to destination	1	2	3	4	5	6
♦ General price of the trip	1	2	3	4	5	6
♦ Shopping	1	2	3	4	5	6
♦ Entertainment	1	2	3	4	5	6

15. Do you think that you will come to Turkey again?

- ☐ I think so/ Yes [Please go to question 16 and 17]
- ☐ Too early to know/ Maybe [Please go to question 16 and 17]
- ☐ I don't think so/ No/ Never [Please go to question 18]

16. If you wish to or may visit Turkey again, please rank the five most important reasons that would encourage you to do so: (1 being most important reason and 5 less important)

☐ Availability of organised package tours
☐ Comfortable flight to Turkey
☐ Comfortable accommodation
☐ Warm, sunny and bright weather
☐ Attractive historic monuments
☐ Plenty to see there
☐ Helpful tourist information centres
☐ Warm, friendly people
☐ Reasonable prices generally
☐ Nice beaches
☐ Other (please specify)________________.

17. Will you recommend Turkey to your friends, relatives, etc.?

☐ Yes ☐ No ☐ Don't Know

18. If you decided not to visit Turkey again, please rank the five most important reasons that discourage you from doing so: (1 being most important reason and 5 less important)

☐ High cost of getting there
☐ Uncomfortable accommodation
☐ Crowded and dirty beaches
☐ Lack of variety of attractions
☐ Little to do there
☐ Uncomfortable roads for travelling
☐ Unhelpful tourist information centres
☐ Rude, unfriendly people
☐ Noisy, unhygienic country
☐ High prices generally
☐ Other (please specify)________________.

SECTION 3: PERSONAL DATA

We would like to obtain some information about you (for statistical purposes only).

19. Which of the following categories includes your age?

☐ Under 25 years ☐ 45-54 years
☐ 25-34 years ☐ 55-64 years
☐ 35-44 years ☐ Over 65 years

20. Are you male or female?

☐ Male ☐ Female

21. Marital status:
- ☐ Single
- ☐ Married
- ☐ Widowed/Divorced

22. What is your educational level?
- ☐ Elementary/Primary
- ☐ Secondary/High school
- ☐ College/University
- ☐ Post graduate

23. What is your household's approximate yearly income before taxes?
- ☐ Under £10,000
- ☐ £10,000-£19,999
- ☐ £20,000-£29,999
- ☐ £30,000-£39,999
- ☐ £40,000-£49,999
- ☐ £50,000 and over

24. What is your employment status?
- ☐ Professional
- ☐ Management
- ☐ Self-employed/Business owner
- ☐ Manual worker
- ☐ Office worker
- ☐ Retired
- ☐ Unemployed
- ☐ House-wife
- ☐ Student
- ☐ Other (please specify)____________.

SECTION 4: OVERALL SATISFACTION

25. Compare with your overall expectation of the trip, how satisfied are you with your visit to Turkey? Please make a mark at the appropriate place in the scale below, so that your feelings towards the trip can be best described.

Extremely Dissatisfied → → → Extremely Satisfied

0%		20%		40%		60%		80%		100%
↑	↑	↑	↑	↑	↑	↑	↑	↑	↑	↑

26. We would appreciate any comments or suggestions to improve the tourism industry of Turkey. (please write your comments below):

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Thank you very much for replying to this questionnaire. The research will not be achieved without your contribution.

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