Tourism Market Research of Antalya City Agaınst Competitors in The Scope Of Destınation Competitiveness

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ABSTRACT

The economies have begun to give more importance to tourism policies and strategies with the exponential increase in tourism mobility. Each country develops and implements policies and strategies to get a share of the tourism market. However, it is seen that regions, even cities, in the tourism industry are now competing with cities in other countries and with other cities in the country due to the increased concentration of tourism activity in some regions of the country. Accordingly, tourism strategies and policies have been developed on the basis of regions and cities. Therefore, the main purpose of this study is to determine the markets in Antalya, Istanbul, Izmir and Muğla in which area they are expert and to identify profits of the competition between these cities have. For this aim, Russia, Germany, Britain, Iran and Ukraine was selected for the study. These are the countries sending the most tourists to Turkey in 2018, and Shift-share analysis was performed by utilizing the tourist data (secondary data) of Antalya, Istanbul, Muğla and İzmir in 2013-2018. Thus, the weak areas of the four destinations used in the study will be identified and recommendation will be given to improve the weak areas of Antalya.

Keywords: *Destination Competitiveness, Shift-Share Analysis, Antalya*

INTRODUCTION

The economic impacts and size of the tourism sector accelerate the efforts of countries to develop tourism and achieve a strategic competitive position. Thus, the conditions of competitiveness in the sector are constantly changing. New services and new destinations are emerging as a result of increased competition in toruism sector. Destinations and new destination strategies and policies are becoming more important in terms of increasing the share of countries in tourism. One of the most striking changes in tourism and service sector since the early 1980s is the globalization of tourism. Over time, the activities of the tourism sector in regional or national clusters have shifted to global scale (Ritchie and Crouch, 2003). The global scale of today's tourism system and the globalization of the tourism sector brought together the importance of destinations. Countries that want to increase their share of tourism revenues have started to give more importance to their destinations. This development has brought destination competitiveness.

Countries that want to generate more income from tourism and plan to expand development throughout the country focus on destinations. Therefore, the competition in the tourism sector is based on destinations. Destination competition, which is defined as the ability of a destination to present and maintain the tourism product that will satisfy the tourists to the maximum extent, different from other destinations, with good quality and good (Bahar, 2005).

Tourism is a sector where the main input is human. For this reason, both tourists and tourism enterprises encounter problems in certain periods and they tend to change their routes and investments. Since the tourism sector provides high amounts of income for the countries' economy, countries are taking serious steps towards this sector. It is important to follow the return on investments, development and new trends of the sector and implement the necessary applications. , the main purpose of this study is to determine the markets in Antalya, Istanbul, Izmir and Muğla in which area they are expert and to identify profits of the competition between these cities have. Secondary data were used for this purpose. The weak areas of the four destinations in the study were identified, and recommendations were given to improve the weak areas of Antalya.

LITERATURE REVIEW

Competitiveness is defined as the ability of a destination to create and integrate high value-added products while maintaining its market position compared to its competitors (Hassan, 2000). According to Ritchie and Crouch (2003) competitiveness (a business, country or city) is generally both a relative (more competitive than what?) and a multifaceted concept (what are the distinctive qualities of being competitive?). Numerous studies have been conducted on destination competitiveness. These studies can be examined in three groups. Most of the studies in the first group (Ahmed and Krohn, 1990; Vanhove, 2002; Miller et al., 2008) are aimed at examining the competitive position of specific destinations. In the second group includes, destination positioning (Chacko, 1998), destination management systems (Baker et al., 1996), destination marketing (Buhalis, 2000), price competitiveness (Dwyer et al., 2002), destination environment (Mihalic, 2000), nature based strategic management of tourism (Huybers and Bennett, 2003). The third group of research (Crouch and Ritchie, 1999) includes models and theories for the development of destination competitiveness.

The Brazilian case can be used to explain how the competitiveness level of the destination varies according to the approaches used in research. Hypothetically, Brazil's size, accessibility, broad territory and general awareness make Brazil a competitive destination among its South American neighbors, however Brazil's competitiveness may be reduced if compared to other destinations such as Indonesia or Australia. In this context, the unique conditions of the tourism cities in our country affect the tourism mobility in these regions. The nationalities involved in this tourism activity that are also influenced by the unique characteristics of the city. In order to determine this, it is seen that shift-share analysis is used in the literature.

The shift-share analysis technique has been applied in tourism (Alavi and Yasin, 2000). The first study in the tourism sector, at the beginning and end of a particular analysis period, performed a typical margin analysis by measuring employment in the tourism industry in South Carolina for various sectors (such as air transport, museums, art galleries and golf courses) and then compared them with a benchmark. The growth that emerged during the period later turned into national growth, industry mix and competitive impact. The second study focused on the characteristics and dynamics of the tourism market for the four Middle East countries. In the third study, Sirakaya et al. (2002) examined the employment in the tourism industry using the shift-share technique. According to Sirakaya et al. (2002: 304), the shift-share technique is an alternative to econometric methods for policy makers who need a rapid analytical tool to assess the performance and composition of the tourism industry. Yasin et al. (2004) analyzed the growth in the number of tourists from five major destinations (Portugal, Spain, France, Italy and Greece) from four major regions of the world (America, Europe, East Asia and Oceania, others) between 1992 and 1996.

METHOD

In the study, shift-share analysis was conducted by using the number of tourists arrivals to Turkey by cities within the scope of 2013-2018 periods. It is a different version of the shift-share analysis technique developed by Esteban-Marquillas (1972) and used by Alavi and Yasin (2000) to measure the growth in the number of tourists in the Middle East region (Egypt, Israel, Jordan and Syria). In the study, shift-share analysis was used to determine the growth and change in the number of tourist arrivals from Russia, Germany, England, Iran and Ukraine (the countries with the highest number of tourists according to nationality in 2018) to Antalya, Istanbul, Muğla and İzmir.

The shift-share equation for the tourist received of city (j) from the region (i) is obtained as follows:

$$T^1_{ij} - T^0_{ij} = T^0_{ij}(G_{AREA}) + T^0_{ij}(G_{iAREA} - G_{AREA}) + T_{ij}\ (G_{ij} - G_{iAREA}) + (T^0_{ij} - T_{ij})\ (G_{ij} - G_{iAREA})$$

The terms of the above equations are defined as follows;

T^1_{ij} = Number of tourists visiting city (j) from region (i) for the 1st period.

T^0_{ij} = Number of tourists visiting city (j) from region (i) for the 0th period.

G_{AREA} = Overall growth rate of the total number of tourists arrivals from all regions from 0 period to 1 period.

T^0_j = Total number of tourists visiting city (j) from all regions in period 0.

T^0_{iAREA} = Total number of tourists arrivals to area from the region (i) in the 0 th period.

T^1_{iAREA} = Total number of tourists arrivals to area from the region (i) in the 1st period.

G_{iAREA} = Growth rate of the number of tourists arrivals to area from region (i) from 0 period to 1 period.

G_{ij} = Growth rate of the number of tourists arriving to city (j) from region (i) in 0th period to 1st period.

T_{ij} = Whern the number of tourists from the region (i) is equal to that of the comparators; it represents the number of tourists from region (i) to city (j).

According to this equation, the real growth in the number of tourists arrivals from the region (j) to the city (i) from 0 period to 1 period is divided into four components. These components;

- **Area effect** $[T^0_{ij} (G_{AREA})]$. This effect measures the change in the rate of change in the expected number of tourists in a city with an equal growth rate compared to the city in which it is compared. The field effect shows the share of that city in tourism compared to the cities in which it is compared.
- **Region mix effect** $[T^0_{ij} (G_{iAREA} - G_{AREA})]$. This effect measures the difference between the tourism growth rate of the number of tourists arrivals from the region (i) and the overall growth rate of the number of tourists arrivals from the whole region.
- **Competition effect** $[T_{ij} (G_{ij} - G_{iAREA})]$. This effect measures the difference between tourism growth rate within the number of tourists arrivals from (i) region to (j) city and tourism growth rate within the number of tourists arrivals from (i) region.
- **Allocation effect** $[T^0_{ij} - T_{ij} (G_{ij} - G_{iAREA})]$. This component, also known as the interaction effect, measures the growth in the number of tourists attributed to the interaction of the regional compound effect and the competitive effect.

As Alavi and Yasin (2000) point out, a city (i) may have competitive "advantage" or "disadvantage" in attracting tourists from its region and may be "specialized" or "non-specialized". These four possibilities are shown in Figure 1.

		Competitive Advantage	
		(+) Advantageous	(-) Disadvantageous
Specialization	(-) Non-specialized	$(G_{ij} - G_{iAREA}) > 0$ $(T^0_{ij} - T_{ij}) < 0$ A, U (-)	$(G_{ij} - G_{iAREA}) < 0$ $(T^0_{ij} - T_{ij}) < 0$ D, U (+)
	(+) Specialized	$(G_{ij} - G_{iAREA}) > 0$ $(T^0_{ij} - T_{ij}) > 0$ A, N (+)	$(G_{ij} - G_{iAREA}) < 0$ $(T^0_{ij} - T_{ij}) > 0$ D, N (-)

Figure 1. Possible Explanations of Allocation Effect

Table 1 shows the number of tourists arrivals from the selected region to be used in the shift-share analysis of the destinations in the study.

Table 1. Number of Tourists from the Country of Origin

	Year	Russia	Germany	England	Iran	Ukraine	Total
Antalya	2013	3,338,166	2,834,413	443,851	36,902	384,778	7,038,110
	2018	4,651,709	2,292,996	632,086	715,011	715,011	9,006,813
Muğla	2013	229,407	208,330	1,337,045	3,118	53,333	1,831,233
	2018	398,596	218,195	1,027,304	1,766	176,871	1,822,732
İzmir	2013	33,724	357,303	114,400	27,930	4,540	537,897
	2018	34,422	381,131	76,970	44,376	20,611	557,510
İstanbul	2013	573,528	1,179,397	456,172	386,339	246,950	2,842,386
	2018	618,511	1,071,634	455,608	934,860	323,454	3,404,067
Total	2013	4,174,825	4,579,443	2,351,468	454,289	689,601	12,249,626
	2018	5,703,238	3,963,956	2,191,968	1,696,013	1,235,947	14,791,122

Calculations related to general growth rates were made before the shift-share analysis. These calculations and their results are as follows:

General Growth Rate (G_{AREA}): (14,791,122 – 12,249,626) / 12,249,626 * 100 = %20.75

The above general growth rate formula was applied to all markets and the growth rate of each market was found. Growth rates of markets;

- ✓ Russia: % 36.61
- ✓ Germany: % -13.44
- ✓ England: % -6.78
- ✓ Iran: % 273.33
- ✓ Ukraine: % 79.23

FINDINGS AND DISCUSSION

Shift-share analyzes were conducted in the context of tourists arrivals from Russia to the region and the results are given in Table 2.

Table 2. Shift-share Analysis of Tourists from Russia to Regiona

City	Real Growth	Area Effect	Region Mix Effect	Competition Effect	Allocation Effect
Antalya	1,313,543	69,258,731	-68,036,621	65,700	25732.76
Muğla	169,189	4,759,630	-4,675,644	231,795	-146593
İzmir	698	699,690	-687,344	-63,320	51671.87
İstanbul	44,983	11,899,294	-11,689,325	-278,672	113685.1

When Table 2 is examined, the determined changes of tourists arrivals from Russia to the region are as follows;

- All cities were not able to capture the expected market share in Russia, as the are impact was positive for all cities in the study.
- The fact that the region mix effect is negative for all cities in the study indicates that all cities are focused on attracting tourists from the Russia region and the average growth rate of Russian tourists in relation to the general regional area is slowing down.
- When the competition effect is examined, it can be said that Russian tourists preferred to go Antalya and Muğla instead of İzmir and Istanbul.
- When the allocation effect is examined, it is determined that the allocation effect of Muğla is negative and other cities are positive. The four cities are positioned as in Figure 2 was made taking into account the area effect, regional mix effect, competition effect and allocation effect.

		Competitive Advantage	
		(+) Advantageous	**(-) Disadvantageous**
Specialization	**(-) Non-specialized**	Muğla	İzmir İstanbul
	(+) Specialized	Antalya	

Figure 2. City Locations as a Result of Shift-Share Analysis of Tourists from Russia

As shown in Figure 2, Muğla has a competitive advantage in the Russian market, while it is not specialized in this market. Izmir and Istanbul have competitive disadvantage in the Russian market and are not specialized. Antalya has a competitive advantage in the Russian market and also specializes in this market.

In Table 2, shift-share analyzes performed for the results given for Russia were performed in other markets. The four cities where the comparison was made taking into account the area effect, regional mix effect, competition effect and allocation effect obtained in the shift-share analysis results for Germany are positioned as in Figure 3.

		Competitive Advantage	
		(+) Advantageous	(-) Disadvantageous
Specialization	(-) Non-specialized	Muğla	
	(+) Specialized	İzmir İstanbul	Antalya

Figure 3. City Locations as a Result of Shift-Share Analysis of Tourists from Germany

As shown in Figure 3, Muğla has a competitive advantage in the German market, while it is not specialized in this market. Izmir and Istanbul have competitive advantage in the German market and also specialized in this market. Antalya has no competitive advantage in the German market, but specialized in this market. The most important reason for this is that while the number of German tourists arrivals to Antalya decreases with each passing year, the number of German tourists increases in İzmir and Muğla. In Istanbul, however, there has been a slight decrease and it continues its advantageous position.

The four cities where the comparison was made taking into account the area effect, regional mix effect, competition effect and allocation effect obtained in the shift-share analysis results for England are positioned as in Figure 4.

		Competitive Advantage	
		(+) Advantageous	(-) Disadvantageous
Specialization	(-) Non-specialized	Antalya İstanbul	
	(+) Specialized		Muğla İzmir

Figure 4. City Locations as a Result of Shift-Share Analysis of Tourists from England

As shown in Figure 4, Antalya and Istanbul have a competitive advantage in the England market, but they are not specialized in this market. While Muğla and İzmir do not have competitive advantage in the England market, they specialize in this market.

The four cities where the comparison was made taking into account the area effect, regional mix effect, competition effect and allocation effect obtained in the shift-share analysis results for Iran are positioned as in Figure 5.

		Competitive Advantage	
		(+) Advantageous	(-) Disadvantageous
Specialization	(-) Non-specialized	Antalya	Muğla
	(+) Specialized		İzmir İstanbul

Figure 5. City Locations as a Result of Shift-Share Analysis of Tourists from Iran

As shown in Figure 5, Antalya has a competitive advantage in the Iran market, while it is not specialized in this market. While Izmir and Istanbul have no competitive advantage in the Iran market, they are specialized in this market. Mugla has no competitive advantage in the Iran market and is not specialized in this market.

The four cities where the comparison was made taking into account the area effect, regional mix effect, competition effect and allocation effect obtained in the shift-share analysis results for Ukraine are positioned as in Figure 6.

		Competitive Advantage	
		(+) Advantageous	**(-) Disadvantageous**
Specialization	**(-) Non-specialized**	Antalya Muğla İzmir	
	(+) Specialized		İstanbul

Figure 6. City Locations as a Result of Shift-Share Analysis of Tourists from Ukraine

As shown in Figure 6, Antalya, Muğla and İzmir have a competitive advantage in the Ukraine market, but they are not specialized in this market. While Istanbul has no competitive advantage in the Ukraine market, it specializes in this market.

CONCLUSIONS AND RECOMMENDATIONS

The number and nationality of tourists to a city in a given period of time depends on the characteristics, diversity, quality of service and specialization and competitive advantage of the tourist supply. Thus, it is possible to know which market in that city is more advantageous or disadvantageous or in which market it specializes or does not specialize, and it can be seen in comparison with other cities in a similar position. In this way, issues such as what the market potential of that city is and how it evaluates this potential and how this potential develops are revealed.

In this study, the shares they received from the markets of Germany, Russia, England, Iran and Ukraine to Antalya, Muğla, İzmir and Istanbul in 2013 and 2018 were examined. According to this;

When we examine the cities that have a share in the Russian market, it is seen that Muğla has benefited from its competitive advantages although it is not specialized. In addition, it is seen that Antalya is both specialized and benefiting from its competitive advantage. İzmir and Istanbul, however, are not specialized and do not have competitive advantage in this market According to this; Antalya should continue its practices to date in order to maintain its strong position in the Russian market. Despite its current advantageous position, Muğla should make market-specific research in order to specialize in this market. İzmir and Istanbul should investigate the characteristics and expectations of these market guests in order to use their competitive advantage in order to specialize for the Russian market and arrangements should be made to meet these characteristics and expectations.

When we examine at the German market, Muğla province is similar to its position in the Russian market, although it is advantageous in this market is not specialized. Studies regarding the German market should be carried out especially to meet the expectations of guests. Although Antalya specializes in the market, it is disadvantageous in terms of competitive advantage. Izmir and Istanbul are seen to be specialized and advantageous in this market, however especially since the German market uses these numbers in these two cities as a hub especially because of the Sunexpress center, and the registration of German citizens of Turkish origin living in Germany through Izmir year-round, The same situation is also the case for Istanbul, and it is thought that German citizens of Turkish origin living in Germany use Istanbul as a hub in their travels to our country. If it is possible to differentiate between the tourist and non-touristic entrances to our country, it is thought that in the light of these new data, Antalya which is at a disadvantage in the competition in the German market, will turn into an advantageous position. What makes us think is the personal experience of the German market as a result of article writers having more than 30 years of industry experience and more than 20 years working as a senior executive in a German-based company.

When we examine the England market, it is seen that Antalya and Istanbul do not specialize in the market despite the competitive advantage. Especially the England market has been preferred for these two cities in recent years and the quality and features of the existing facilities are increasing day by day. General difficulties experienced in this market may cause problems in the service quality of the facilities which are physically advantageous from time to time due to the lack of specific details of this market. Moreover, Muğla and İzmir are disadvantaged due to their lack of competition due to their competitive advantage, the physical characteristics of the facilities and the price-service performance due to their experience in the English guests they have worked for many years.

In light of analysis, the evaluations made on the Iranian market Antalya is advantageous although Antalya is not specialized and Muğla is disadvantageous although it is not specialized. Izmir and Istanbul, on the other hand, seem to be specialized in this market, but they seem to be disadvantaged. The most important assessment to be made regarding this market is that the current Iranian tourist figures do not reflect 100% accuracy due to the fact that direct flights from the cities of Antalya and Muğla to the cities of this country serving similar concept are not allowed by the Iranian State. Due to this prohibition, a significant portion of the tourists coming to Muğla region are transported through İzmir and Iran flights to Isparta within Antalya region are carried to Antalya by road. For this reason, it is not possible to find out how many of the Iranian guests who seem to have come to Izmir from these data, how many they actually stayed in Izmir and how many they were transported to Muğla region by road. Similarly, the lack of numbers of Iranian guests who appear to have entered Isparta does not give the right result for Antalya. Again, according to the article author's sectoral experience, if the real data could be obtained, Antalya is predicted to be both a specialized and competitive advantageous city for the Iranian market and Muğla as a specialized but competitive disadvantageous city. However, it is assumed that İzmir will change its position in the specialized as non-specialized while preserving the current competitive disadvantage. Since the Istanbul data is assumed to be as close to reality as possible, no change in the current status is foreseen.

When we examine the Ukrainian market, it is seen that Antalya, Muğla and İzmir provinces have competitive advantage although they do not specialize in this market, while Istanbul has a competitive disadvantage despite being specialized in this market. As can be seen in the light of these findings, it is a known fact that the Ukrainian guests are mixed with Russian guests. However, Ukrainian guests exhibit different characteristics due to their personal characteristics and tensions between the two countries and the guests of the two countries do not like to be together. Therefore, in spite of the price advantage, it seems that we specialize in these markets because of the lack of services that Ukrainian guests feel special in their facilities. This distinction is important, especially since these three provinces serve this market with an all-inclusive concept. However, due to the high price of accommodation, this market has an economically low income level and has put Istanbul at a disadvantageous position compared to other cities

In this case, it is thought that the data does not fully reflect the real situation due to the airport-based data. For this reason, it is recommended that a similar study be conducted through the "Daily Reported Police Station Lists" based on the mentioned cities for confirmation purposes.

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