TOUR OPERATING BUSINESS

Şükrü YARCAN, Gürel ÇETİN

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Şükrü YARCAN

Prof. Dr., Kapadokya University, Institute of Graduate Studies, Department of Tourist Guiding, Ürgüp, Nevşehir, Turkey

Gürel ÇETİN

Assoc. Prof., Istanbul University, Faculty of Economics, Tourism Management Department, Istanbul, Turkey

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INTRODUCTION

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Tourist product is composed of an amalgam of services and products that are brought together to create an overall tourist experience. This multi-service product, by definition, includes a trip away and an overnight at the destination, and can either be created by the tourists themselves or by a tour operator. Travel trade is an important sector of the tourism industry responsible for packaging travel services and offering them to potential travelers. They also have an important role in commercialization of tourist products and destination development. Tour packages are usually cheaper, safer and more convenient for tourists. Hence, travel firms create the link between tourist products at the destination and the travelers. Tour operators even create and brand destinations. They take various risks and invest in the destination product ahead of the sales, hence they are an important stakeholder for tourism destination development. Despite there being extensive literature on transportation, accommodation, restaurants, attractions and events; the tour operators, their place in tourism system and their operations are neglected in education and research.

This book addresses this gap both in theory and practice. The first chapter discusses the nature of the tourism industry and tourism supply. Tourism resources, tourism types, tourist services and organizations are also explored in this section. The second chapter focuses on the tourist product, features of tourism as a service, standardization and distribution of tourism products. This chapter also introduces travel firms as both producers and intermediaries of tourism products and services. The third chapter focuses on the travel industry, defining travel agencies and tour operators. Differences between the two and different types of each are also detailed in this section. This book also recognizes tour guides as an important part of the tourism industry and a significant partner to travel firms. Tour guides, their roles, certification and their relationships with tour operators are examined in chapter four. Tourism education, its significance, characteristics and challenges are provided in chapter five. Chapter six delves into tour operation, its management and stages. The importance of tour operators for destination development, sustainability, branding and competition and their relationships with other stakeholders are examined in this chapter. Chapter six also explores ICT information and communication technology tools in tour operation, disintermediation and online travel agencies. This book is designed as a comprehensive destination management book as well. Hence the second part of the book delves into multinational tourism organizations, tourism types and offers case destinations for further discussion. The seventh chapter focuses on multinational corporations that invest in travel trade, including financial institutions. Vertical and horizontal integration in the industry and different types of investors are also examined in this chapter. Business travel and MICE tourism are discussed in chapter eight and nine. Their characteristics, types, operation, destination and choice factors are examined supported with sample itineraries, promotion kits and SWOT analysis. Faith tourism is another tourism type, explored in chapter ten. Istanbul and Anatolia as faith tourism destinations and their relationship with tourism are explored from the perspective of different stakeholders. Chapter eleven delves into culture tourism, which is another significant tourist segment for tour operators. Culture tourism is explored from the perspective of Istanbul and its cultural resources. This book, in chapter twelve, also makes a comparison between two popular destinations in Turkey: Antalya, the major leisure destination and Istanbul, the center for business travel and cultural tourism. The book finally concludes with an epilogue discussing the geopolitical dimensions of tourism and tourist flows.

As both authors are scholars with hands on experience in tour operation, who integrated theory with practice within the book and provided real life examples, illustrations and itineraries. It is very much hoped that the content will provide both theoretical and practical contributions and will be a useful resource for tour operator education and training

I Tourism Industry

The tourism industry is composed of many different and divergent companies. It mostly comprises of small and medium sized enterprises. There are a few giant firms in the industry that affect and regulate the international tourism industry and market. Just a few enterprises are capable of catering for all the needs of tourists. The tourism industry converts tourism resources into tourist attractions and tourist products through financial sources, entrepreneurship, investments, and manpower. Thus, a tourism supply suited for the needs of the tourism market, tourists, travelers and visitors is created. Tourism supply is the sum of resources, physical assets and organizations employed in tourism to serve tourists. Supply comprises of tourism resources, primarily natural attractions, man-made attractions, cultural attractions and purpose-built facilities (Vanhove, 2005:76-77). To a certain extent, the general infrastructure of a country as well as the specific tourism infrastructure, physical and organizational superstructure also comprise tourism supply.

Table 1. Tourism Supply

Tourism Resources	Tourism Type	Tourist Type	Infrastructure
Natural Resources	Coastal Mass	Holidaymaker	Specific, Coastal
Cultural Resources	Cultural, Niche	Culture Tourist	General, Urban

Such resources in a destination exist independent of tourism, yet are extensively used by tourists and the tourism industry. All destinations possess natural, man-made, cultural and sociocultural resources. The resources are converted into tourist attractions, tourist products and objects of tourism through investments realized by the tourism industry. The purpose-built facilities and premises are managed and operated by the initiatives of the tourism industry. Since the tourist expects an enjoyable holiday experience, the consumption of tourist product necessitates active participation of intermediaries at firm level and a human touch at individual service level. Tourism supply is composed of tourism resources, physical infrastructure and superstructure. Infrastructure, physical in character, is composed of general infrastructure and specific tourism infrastructure. General infrastructure is urban in character; roads, ports, transportation facilities, electricity, water systems, sewage disposal etc. General infrastructure is a part of a country's development process and it relates to cultural, city, and urban tourism. Specific tourism infrastructure is created to develop and promote tourism at / to a region, either rural or coastal. Specific tourism infrastructure is composed of airports, seaports, marinas, recreation areas and the like, created to develop tourism and partially it benefits the residents too.

Tourism industry is the superstructure of tourism and organizations in tourism. Tourism industry is broadly economic entities catering for the provision of services, goods and products to satisfy the needs of travelers. Tourism superstructure is composed of mainly transportation companies, accommodation establishments, restaurants, recreation facilities, travel trade companies, primarily tour operators and travel agencies. Terms such as tourism industry, travel industry, travel trade, and hospitality industry are used in tourism literature to denote the industry and its sub-sectors. Tourism industry encompasses of many organizations and economic activities that are very divergent. Service is the main theme of tourism at organizational level. Services and facilities are allocated to the use of tourists for a purpose and a designated time. The tourist product of each service supplier is different than the other, yet different services depend on each other and each product complements the other (Lickorish and Jenkins, 1997:98-134; Holloway, 1987:77-88). The product of a hotel is a room, bed and meals, of a transportation company a seat, of a cruise liner a cabin, of a tour operator an organized tour, holiday and other components of travel, of a museum sightseeing and of a guide information and assistance in tour operation. There are many services supplied in tourism such as transportation, accommodation, catering, recreation, miscellaneous services related to tourism, marketing, travel industry services as well as electronic distribution systems that disseminate all kinds of tourist products.

There are two main types of tourism enterprises; primary and secondary enterprises (Lickorish and Jenkins, 1997:98-134; Holloway, 1987:77-88). Primary enterprises are transportation companies, accommodation establishments and accommodation management companies, catering units, travel industry firms, tourist attractions like theme parks, spa centers, music performances, and festivals. Primary enterprises that depend on tourism revenues comprise the main tourism industry. Attractions used in tourism such as museums, leisure and entertainment facilities may be regarded as primary or secondary enterprises depending on the extent they are consumed by tourists. Entertainment and leisure activities may be regarded as primary enterprises. Secondary enterprises are local transport, entertainment, leisure activities depending on the use, location and revenue generated, manufacturers and retailers of souvenirs, and shopping facilities. Secondary enterprises mostly cater for the natives / residents at the destination. Their revenues and existence partly depend on tourism. Tertiary support services such as printing, guide books, and travel publications are a part of the tourism industry as well. Public services, trade associations, official and semiofficial organizations, information bureaus, national tourist offices, and other public bodies such as travel agencies and tour operators, hotelier's associations, and guilds of guides are within the scope of tourism. As well, air transport and civil aviation associations, international tourism organizations and other tourism and travel trade associations are part of the industry. These organizations do not derive income directly from tourism, but they govern and regulate the tourism business. Banks, insurance companies, information technology and information communication technology companies, internet travel and hotel firms, hotel and travel computerized reservation systems, and global distribution systems, construction companies, land developers and others such as shopping malls are involved in tourism and they are an integral part of the tourism industry. In determining the scope of the tourism industry, tourist expenditure patterns can be investigated. If most of the volume of a business is derived from tourism and tourist expenditures, then it is within the tourism industry. Some of the main tourism organizations and associations related with the tourism industry are:

International Organizations: UNWTO- United Nations World Tourism Organization, IATA- International Air Transport Association, UFTAA- United Federation of Travel Agents' Associations, WTTC- World Travel and Tourism Council. Regional and National Associations and Organizations: ETC- European Travel Commission, PATA- Pacific Asia Travel Association, TÜRSAB- Association of Turkish Travel Agencies, ABTA- Association of British Travel Agents, ASTA- American Society of Travel Advisors, TTOK- Turkish Touring and Automobile Club, TUROB- Association of Turkish Hoteliers, TUREB- Turkish Tourist Guides' Association.

A national tourist office is an integral part of the tourism industry that supervises and directs the development of tourism. It may be called a tourist commission, tourism council or a tourist board. Usually, a national tourist office is a ministry, like the Ministry of Culture and Tourism. A national tourist office, in brief, directs the tourism industry, provides legislation for tourism, supervises the tourism industry, promotes the country as a tourism destination, coordinates activities related to tourism, sets up and implements tourism policies, assesses tourist attractions and their potential, conducts research on tourist origin markets and performs educational and training activities.

II Integrity of Tourist Product

Tourist product is the total of services and products consumed by the tourist. Tourist product, defined as an inclusive tour or organized holiday is a bundle of services integrated together as a single entity for the needs of tourists. Tourist product production and consumption is a long and detailed process that involves promotion, marketing and distribution of the product. The production, distribution and consumption process of the tourist product necessitates participation of specialist, cultural and mass market tour operators, inclusive holiday producers and distributers, travel intermediaries, retailers, and travel agencies. At an individual level, tourism professionals such as guides, tour leaders, and tour representatives for the conduct of tours are essential (Pond, 1993:78). Tourist product at purchase, service and consumption levels is an experience. A holiday dream is sold to the potential tourist. The intangible tourist product is bought for future consumption without the product being seen in advance. Therefore, the role of travel industry is essential for the consumer both at the purchasing stage, such as at travel companies and at the consumption stage, such as through professional tourism personnel, for the enjoyment of the holiday, tour, and travel experience (Nettekoven, 1979:141-143). The relationships between the principals, suppliers, service providers, tourist product producers, product distribution media, retail travel agencies and other intermediaries such as electronic distribution networks all affect the destination and tourist product choice and hence, the tourist.

Individual products and services provided by travel companies are international and local transportation, land services at the destination, accommodation, catering, transfers, museum services, recreation, entertainment, sightseeing, guiding, foreign independent tour arrangements, individual travel arrangements, information provision, passport and visa services, currency exchange, cultural tours, cruises and inclusive holiday package sales. Since there are many products a tourist consumes, tourists' consumption affects a wide range of sectors of the economy. An organized tour or an inclusive holiday is highly standardized, complementary and a dependent tourist product. The components of an organized tour comprise an integral part of the product and it is a specifically integrated entity that cannot be separated. The tourist product should be acceptable for the tour operator and sellable to the tourist. Acceptability and salability are defined as being acceptable in western standards and sellable in comparison to comparative destinations and competitive tourist products and their prices. Main travel related product types are: Transportation: Local and international scheduled, charter, leisure, low-cost airlines, rail, coach, rent a car, cruise line, yacht, boat, bare-boat. Accommodation: Hotel, city hotel, resort hotel holiday village, youth hostel, time-share flats, camping site. Catering: Restaurant, night club, meal package, lunch box. Destination services: Museum, archaeological site, national park and theme park. Meetings: Convention, congress, conference, trade fair and exhibition, corporate service, product promotion, incentive organization. Tours: Airline, rail, cruise-line, and coach tours, weekend city package and city sightseeing tour. Information provision: Visa, passport formalities and all other related services.

A few other tourist products are travel and trip cancellation insurance, duty free, shopping, reservations of all kinds such as theatres, festivals, and shows as well as working camps for young people and students. There are also types of tourist products organized and offered for special interest clients and niche tourism markets such as history, art, archaeology tours, cultural tours, rural tourism products, agriculture, cottage farms and village tourism products, eco-tours, nature tours, adventure tours, trekking, walking, hiking, camping, paragliding, cycling, mountaineering, wild life tours, jeep safari, overland tours, natural history tours, gourmet, gastronomy, food and wine tasting activities, sports and golf playing, safari, photography, photo safari, Biblical and faith tours, study and education tours, spa and health tours, gambling tours, shopping tours, and polar and arctic tourism. Every leisure and recreation activity can be packaged and sold as a bundle and standardized for consumption by the masses.

"Unlike the durable goods, tourism services cannot be physically displayed or inspected at the point of sale since they are intangible. In the marketplace therefore, tourism products are almost exclusively dependent upon representations and descriptions by the travel trade, i.e., information in printed and audio-visual forms for their ability to attract consumers" (Buhalis, 1996:34). Information provided to the potential tourist on tours, holidays and other travel activities should be given on time, be precise and correct. Information collection and dissemination is one of the main functions of the industry particularly of the travel industry and distribution channels. As the tourist product is an experience, good knowledge about the product is fully obtained during travel and the holiday experience. Since the tourist product is intangible and the combination of goods and services is experiential in nature, tourists who expect a certain level of product quality rely on reputable brand names and images to reduce uncertainties. Branding of tourist product increases tourism companies' comparative and competitive advantages. This is especially true for the natural resource-based holidaymakers' market where tourist enclaves provide high brand quality and a protected environment and atmosphere for the beach tourist. Creating an established tourist product brand image is an effective way to sell the holiday because the location at which the product is consumed is a new and foreign environment. Tourist product is bought at one location and consumed at another unfamiliar location. Since the conditions of the host environment are not known, a well-known brand name assures tourist or traveler a quality product. Creating an established trademark and brand image favored by prospective tourists provides an advantage to travel companies and accommodation establishments as well as airlines and tour operators. In a developing country, where a strong tourism industry and a favorable country image does not exist, branches of well-known international hotel chains at the destination affect tourists' decision to favor the destination. In order to have a market share in international tourism and be an integral part of tourism information, communication networks necessitate the integration of domestic tourism companies into the international tourism industry.

Expertise of international hotel chains maintained by knowledge and management technologies is a guarantee for service quality offered by accommodation premises. The traveler is attached to the brand name of hotels, holiday products, tour operators etc., The reputation of the travel company is instrumental in choosing a specific tourist product for a holiday. For the business traveler, the established reputation of the city hotel attached to an international chain plays a crucial role in selection, while the brand name and reputation of tour operator are important for holidaymakers. Since the tourist product is an intangible experience asset, a tourist relies on travel agencies and tour operators in choosing a destination and purchasing a holiday. Information provided by the travel industry forms the basis and boundaries of the destination and tourist product choice set. Portfolio, scope and types of tours, and holidays offered by tour operators and travel agencies influence clients' choices.

Standardization of Tourist Product

Tourist product, as an organized tour and inclusive holiday is a highly homogenized and standardized entity. The industry as a whole standardizes all kinds of products offered to the market by different tourism enterprises. Standardization leads to creation of identikit destinations and products. Tour operators, as the powerful agents of channeling and influencing tourists' choices, sell identikit products at different but similar destinations. Standardized products produced in a short span of time at low costs lead to an increase in production and turn potential demand into actual demand. As demand increases, more standardization becomes necessary in order to produce more units of the same product. Along with increase in sales volume, by offering standardized tourist products that assure a certain quality and affordable price level, destination facilities, domestic products as well as tourists' consumption patterns are controlled. Standardization in hotel design, layout, furnishing, décor, also cuisine as well as tours, holidays and their product components is a very common method. Nominating the quality of destination services, and the duration of organized tours and holidays is a dominant feature of tour operating business. Standardization of local components of a tour enables domestic tourism establishments to be included in brochures, catalogues, websites, distribution channels and in other tourism information media. A bundle of dependent and integrated travel services and goods comprise different components of a packaged holiday. Especially, in the coastal mass tourism, tour operators produce and distribute highly standardized holidays. The international hotel chains and multinational tour operators offer standardized, western quality services to their clients. The tour operator sells a very standardized product with a brand name that can help in building customer loyalty of the tourist to the tour operator. By standardization the tour operator reduces the risks, related to the quality of service and other transactional uncertainties (Buckley, 1987:193). The tour operator controls transactions as well as the quality of services rendered. The standardization process can also be observed in catering, fast food units, restaurants and airlines. The product bought by a leisure tourist is an organized tour with at least a minimum level of acceptable standard. The acceptability of the product, both for quality and price depends on the ability of tour operating businesses to produce standard products. International tour operators offer tourists strictly organized tours and inclusive holidays. Brands and images created by these corporations are yardsticks for quality and accessibility. The leisure tourist or business traveler would expect a satisfying consumption land product quality level from tourism service supplier companies. Reputable brand names and trademarks ensure the clients receive the same level of services at different locations throughout their travel and holiday so that they can have a favorable experience. Tourists' product choices set boundaries which are determined by the products and brands made available in the marketplace, and are both limited.

Tourist product as an organized cultural tour, an inclusive city tour or beach holiday is a standard entity not only with their constituents but also with their duration of consumption. The main constituents, as hotels and meals of organized tours, are western style and quality. A few local components are also embodied in tours, like a visit to a village, pseudo created authentic events, attractions, native food preparation etc. Even if such components are embodied, a certain degree of standardization is achieved such that the additional constituent offered as a genuine, traditional experience contains modern elements for the product to be acceptable. Pseudo-events and attractions aim to create a sense of genuine experience; an exhibited folk dance performance, a staged village tradition, a performance of religious or marriage ceremony are such experiences. Standardization of tourist products is related to the control of tourist product quality and the contents of its components. If modern inputs are not available at the destination, they are imported from tourist origin domicile countries. Drinks, alcoholic beverages and food supplies imported by the tourist receiving country create leakages from the economy. Expatriates and foreign personnel are employed in hotels and travel companies. Foreign cooks, managers, animators, department heads, tour representatives, tour escorts and other human elements are influential in supplying tourism and travel related services to foreign clients. Along with physical tourist product input and service duration of organized tours, holidays are also standardized. Standardization is a necessary requirement also required to produce more tours let it be a cultural tour, urban tour, faith tour or a sojourn beach holiday. Standardization enables scale production with more inputs that in return decrease per unit the cost of the final consumption product. Concurrently, as an outcome of high investments, different components of tourist product are produced more and economies of scale is achieved. Such a line of production is not different from other sectors of the economy where mass produced standard products are cheaper than the individual tailor-made ones. Standardization enables the tourism industry to produce higher quantity products with each unit of product at a lower cost and price and thus prospective potential demand is transformed into an actual real demand.

Products, destination facilities, and consumption patterns of tourists are shaped and regulated by standardization. Demand is influenced by standardization as the alternative products are either identical or minor variations of each other. Organized standard holidays, where per unit cost of tourist service is low, provide more profits to the tourism entrepreneur. When every input is standardized, then the final organized tour or holiday is transformed into a homogeneous product. By importing western and modern constituents, the purchase of the consumer is influenced in favor of the tour operator. The tourist is influenced, directed and commanded to buy an alternative but very similar product and thus are led to decide on an organized holiday that the tour operator has vested interests in. In the sequence of the distribution network both the destination’s tourist products and the consumers are ruled. Standardization creates similar destinations and identikit tourist products and is a system by which tour operators sell completely the same products at different destinations. For every heterogeneous tourist motivation and for every client profile there are available homogeneous tourist products on the international tourism market. The more tourist products are standardized, the more production is achieved in a short span of time at low costs, hence cheap prices. As demand increases, more standardization is necessary to produce more units of the same asset, let it be an organized tour, inclusive holiday or a hotel, room etc., Tourist products, tourist product prices, tourists’ demands and choices, their consumption, ground services and land facilities are at the mercy of the international travel industry. The dominant role of the tourism industry becomes more important as international tour operators create holiday images in line with their investments and vested interests. Destinations supply travel related services and tourist products in line with tour operators' demands. Domestic tourism companies of destinations cannot differentiate their products, dictate the types, prices and rates of services they offer and have to comply with the standards and cooperation terms endorsed by international tourism corporations. A typical example of the case explained is all-inclusive beach holidays at sun destinations, either at an island or at a Mediterranean destination. Standardization enables the local tourism companies to be included in brochures, catalogues, websites, electronic distribution systems of tour operators as well as independent electronic tourism media. Briefly, standardization is both a reason for and outcome of the international tourism demand increase. This rigid system of tourism, a dominant feature of international tourism structure, is one of the reasons for the dependency of tourism destinations.

Distribution of Tourist Products

Sale of a tourist product, defined as an inclusive tour or packaged holiday, is influenced by distribution systems in the travel industry. Information technology, information communication technology, technological advancements and opportunities provided by the internet to purchase tourist products have impacts on product choice. Although tourists seem to be independent in their choices by using information technologies, the electronic distribution media are created by information technology firms and international tour operators that limit the choices of tourists in line with the interests of these companies. Though these companies form a different opportunity for tourist product formation and purchase, tourists have limited flexibility in their choices since the product made available through electronic distribution networks have to comply with the standards, norms and membership rules set up by information technology companies either owned by tour operators or independent entities. If the products are not high-quality nor complying with modern standards, they are not included in the electronic distribution networks. Also, the principals and suppliers have to accept the membership rules and fees, and pay high commissions in return for reservations they receive. Electronic distribution networks are dominant features of the travel industry and opportunities created by information technology and information communication technology companies facilitate the distribution and purchase of tourist products.

Some of the electronic media are listed below. These can also be classified as direct reservation intermediaries and indirect reservation sites. The direct reservation sites (e.g.,, booking.com) serve end customers directly whereas indirect reservation intermediaries (e.g.,, Sabre) serve travel trade organizations and operate mainly B2B.

The role of distribution channels is very strong in the tourism and travel industry. Tour operators, travel agencies, tour brokers, electronic reservation systems, internet companies, electronic media, communication technologies and other distribution specialists' marketing research and promotional activities enable these companies to have an important role in the dissemination of travel related information both at the tourist generating centers and at the destinations. The images of tourist products of the principal suppliers are shaped by these intermediaries that have the power to influence and direct tourists' demand and choices. The tour operator, as distribution channel, plans a tour, organizes and coordinates all services, brings together components of tours, produces the final product as a package, promotes, markets, distributes and sells its products as well as the products of other suppliers such as hotels. The tour operator prepares and processes operational procedures necessary for an enjoyable holiday experience, assesses the quality of suppliers' services at the tourist origin centers and destinations. In the tourism industry, each product and service provider; hotel, airline, cruise line, food and catering unit etc., are suppliers. The tour operator that produces a niche product, such as a cultural tour or a standard organized holiday, distributes its products to the public either directly or via intermediary companies and is also a supplier for retailer travel agencies and the public.

As a part of the final holiday production sequence, the ground services are prepared as a destination package and sold to the tour operator with a profit margin by the inbound tour operator. Ground services are accommodation, catering, land and air transportation, transfers, guiding, sightseeing, shopping, etc. The ground services at the destination can be sold to the tourist by different sales methods depending upon the type of service and the sales policy of the supplier. Not only the type of service offered affects the sales method, but whether the sale is an organized tour, or individual travel arrangement matters. In foreign independent travel arrangements, the client can contact a supplier (hotel, airline, etc.,) directly. The client can also benefit from professional assistance of a travel agency for advice and better rates. The sales methods are very similar to the case where principal suppliers use a travel agency or sell their product to the tour operator.

The two main distribution types are direct without intermediaries and indirect using intermediaries. Destination suppliers may use a number of methods to sell their products. If ground services are sold directly to the tourist, then no extra costs are incurred while high profits, flexibility in pricing and rates can be achieved. When ground services are sold via travel agencies, then reduced rates, that are also commissionable to the travel agency, are applied. In this case the consumer receives professional assistance. If ground services are sold directly to the tour operator, sales are guaranteed but this method contains the risk of being under the pressure of the tour operator, especially in competitive market conditions. Since tour operator bulk purchases at low rates, selling directly to the tour operator is detrimental to the advantage of the principal supplier, the most common sales method is to sell ground services via a local tour operator. Then, the marketing expenses diminish and the guarantee of the local tour operator as an intermediary is achieved (Gee and Fayos-Sola, 1997:97-100).

In direct sales, there is contact between the consumer and service supplier such as reserving a room from a hotel or purchasing a ticket from an airline. This procedure provides the client a flexible negotiation opportunity to obtain better rates and fares with an on-line purchase directly from the supplier. A disadvantage of a direct deal for the principal supplier is to lose its contact with intermediaries that leads to a decrease in revenues and profits (Gee and Fayos-Sola, 1997:97-99; Collier, 1994:198 cited in Gee and Fayos-Sola, 1997). A disadvantage of a direct deal for the traveler is the client may not know the best product and service choices and may not be well informed about best rates and fares due to time cost considerations, as there are many available opportunities and selections.

In indirect sales method, service and product suppliers make use of the travel industry and information technology intermediaries to reach the client. A tour operator bulk buys rooms from a hotel and constructs an inclusive tour by adding miscellaneous constituents such as international air transportation, land services package etc. In this case it is an intermediary for the hotel, airline and other destination services and also for the tourist who buys the package through a retail travel agency (Gee and Fayos-Sola, 1997:99), or via electronic distribution systems. Mostly, group travel products and organized tours are bought from indirect distribution systems, such as travel agencies, with the help of certified travel counsellors.

Table 2. Tourist Product Production and Distribution

Destination Services	**Air Transport**	**Sales and Marketing**	**Tourist**
Hotel	Scheduled	Tour operator	Websites
Meals	Charter - Subsidiary	Retail travel agency	Brochures
Local transport	Low-cost airlines	Sales to other tour operators	Catalogues
Transfers		Specialty intermediaries	Travel media
Museums,sightseeing		Clubs, associations	Other media
Guiding		Incentive houses	
Entertainment, shopping etc.		Internet, electronic media	
Travel Package Product Features			
Availability	Accessibility	Sale-ability	Acceptability

Travel intermediaries form the main link between accommodation establishments and transportation companies in creating an organized tour. A package tour or holiday is related mainly to the matching of transportation modes with the destination's accommodation facilities and other ancillary land services. Inclusive holidays are well organized and the consumption process is strictly commanded whereas individual travel organization through direct contacts is flexible. In between individual travel and organized travel is the foreign independent tour, an individual semi-organized, partly flexible travel organized by travel agencies for individual travelers or small groups called a party. In individual travel, the client directly contacts the supplier and purchases the product. In a foreign independent tour, the individual traveler or a small group of people organizes a few components of travel arrangements via a travel agency. Therefore, semi-flexible holidays, in some cases business travel, are organized by foreign independent travel arrangements. Organized group travel tours are either sold to the public directly by the tour operator or via travel agencies which are either independent or owned by the tour operator (Laws, 2000:117-122). The organization of each travel type is outlined below.

Table 3. Characteristics of Travel Types

Individual Travel	**Foreign Independent Tour**	**Organized Group Travel**
Direct	Individual, intermediary	Indirect, intermediary
Independent, flexible	Semi organized, semi flexible	Organized, rigid
Culture tourist	Culture, leisure, business travel	Packaged leisure tourist
Self-organized	Custom, tailor made	Standard group travel
May use travel firm	Organized by travel agency	Organized by Tour operator
Expensive	Less expensive, semi-inclusive	Cheap, inclusive
Cities, remote regions	City break, weekend escape	Enclaved resorts
City, urban hotels	City, urban hotels.	Resort hotels
Scheduled, low-cost airline	Scheduled, low-cost airline	Charter, low-cost and leisure airline

III Travel Industry

In the travel industry, there are mainly three types of travel companies that deal with organized travel and holiday arrangements as well as individual travel services and products. These are, travel agency or travel agent (i), a retailer, tour operator (ii), a producer of tourist products and services and local tour operator (ii), incoming / inbound tour operator, and a producer.

Travel Agency

A travel agency operates on behalf of travel service providers and sells supplier services in return of a commission with a contract. A supplier is a principal that sells certain travel arrangements and tourism services. Travel agency as a subcontractor is an intermediary between travelers, tourists and tourism services, tourist products. Travel agent, as a person, is an experienced professional and travel counselor providing the public travel related consultancy services ranging from planning and providing advice to coordinating travel arrangements within the budget of travelers. Travel agency is a company that sells tourism services, transportation tickets, accommodation services, organized tours, inclusive holidays, packaged tours, cruise packages and other travel services upon demand. It acts on behalf of principal suppliers such as carriers, accommodation units, restaurants, tour operators, cruise lines, museums, guides and other travel related service suppliers. Since the needs of travelers are very varied and diversified, all services that might be demanded by travelers and supplied by intermediary companies cannot be outlined. Travel agency also provides ancillary services like obtaining visas, travelers cheques, currency exchange, and travel insurance.

Although a travel agency is a retailer and sales agent for organized tours and holiday packages on behalf of tour operators, it can arrange and organize certain travel services as a package upon demand. A travel agency is not the sole producer of prearranged services, but prepares limited travel and tour packages when a demand arises. The stock of a travel agency is information, tour catalogues, brochures and portfolios of tours made available through electronic distribution systems. In the case of accommodation units and airlines, services are transmitted to the travel agency by electronic reservation systems and global electronic distribution systems, as well as by electronic media of information technology companies via the internet. The tour operator sells tours through its own offices and retailers it sets up or via independent retailer travel agencies. If a travel agency sells more than the quota it has to achieve as a target, it receives an override commission. A travel agency earns commissions in return for sales. Overrides are paid in order to increase the sales of a certain tour operator by providing an incentive to the retailer. Tour operators also sell tours through electronic distribution and booking channels placed in the offices of independent travel agencies and through user friendly internet websites. A travel agency as a retailer of tourism business which benefits from tour operators' packaged tours and inclusive holidays as it does not allocate time and financial resources to find and locate knowledge and information on destinations and their tourist products. A retail travel agency sells supplier products as a distribution channel. A travel agency provides access to the tourism market for suppliers and principal companies enabling them to sell their products efficiently. It provides access to travelers and tourists in buying various travel services. A travel agency might charge a handling fee if the travel arrangements necessitate extra expenditure.

A travel agency provides consultancy on travel services, makes suggestions to prospective clients in line with their interests and within their budget, it disseminates information on accommodation units, transportation systems, tours, tariffs, product prices, service provision clauses, it sells the product or service such as tours, air tickets, meals etc., when demanded. A travel agency acts as an intermediary for travel service provision, obtains visa, issues travel insurance if authorized, acts as an intermediary between consumers and suppliers, markets and sells products of service providers on a retail base with an agency agreement.

Tour Operator

Tour operator is a company that plans, produces, markets, distributes and sells the organized tourist product. It buys individual travel services, such as air transportation, accommodation and destination services from suppliers such as carriers, hotels and ground operators, and matches these constituents to produce organized tours and inclusive holidays. A tour operator assembles different parts of travel services, mainly ground travel services and international transportation, to produce an organized packaged tour. It manufactures group tours, inclusive holidays and standard tour packages. An inclusive tour or a resort holiday is sold with a mark-up or profit margin to the public either directly or through distribution networks, intermediary travel agencies, electronic media, and electronic distribution channels either owned by the tour operator or information communication technology companies. The tour operator sells its products either through independent retailer travel agencies or through its own travel agencies and travel shops. Tour operators, especially in the coastal mass market, integrate with other tour operators and travel agencies as well as leisure airlines and accommodation establishments (Holloway, 1987:82-87).

A tour operator in origin countries is the producer of a holiday product that is a different entity in character than its components. There are mainly mass-market holiday tour operators and specialist tour operators (Holloway, 1987:171-173). Other than holiday tour operators and specialist tour operators, there are a wide range of niche operators that work in cultural tourism, faith tourism, cruise operations, adventure travel and others. A holiday tour operator forms joint ventures at the destinations. The tour operator creates, directs and channels tourist demand. If economic conditions change or the environment degenerates, the tour operator shifts tourists' demand to alternative regions, localities, sites and tourist products. The tour operator that sells standardized tours and holidays is able to replace or substitute tourist products. It influences the holiday choice of tourists by offering similar products at different destinations. Due to these policies, destinations' suppliers depend on tour operators. The situation is exemplified by the country's dependency on tour operators (Ascher, 1985:62-66). As well, the developing country destinations main domestic tourism enterprises are managed and operated by international tourism companies. Only small and medium sized enterprises and economic activities are left to the national companies. Big international tourism corporations set up their structures in different countries. Hence, the benefits accrue to these companies and their domestic partners. Tourism may help a developing country's economy to integrate with the developed economies if the general economy is at a certain development level. Tourism affects the economic development of the destination favorably if the country's development level is high (Yarcan, 1996:135-144).

A tour operator mainly produces final tourist product by integrating different travel components and tourism services into an organized tour or holiday. It buys tourism services from suppliers prior to operations, prepares tours for a future expected demand, hires or reserves all or some rooms of accommodation units for a season or annually, makes reservations from airlines in the form of seat blockage or allotment, charters flights and hires aircrafts, determines details of tours and holidays, promotes and markets tours, and sells its products directly online, offline, or via indirect distribution channels, such as retailer agencies. A tour operator undertakes a sales risk of organized tours through contractual agreements, bulk buys, block purchases from hotels and airlines, realizes block reservations at principal supplier companies with a release date and cancellation deadline, prepays for the services bought ahead of time, makes advance payments to dealers for reservations, and thus undertakes risks in providing tourist services. By realizing high investments and achieving low costs in tourist product formation, an international holiday tour operator creates and directs tourist demand and matches the demand with the destination's tourism supply. The tour operator actually markets tours and holidays rather than destinations. The specialist tour operator markets certain destinations depending upon its expertise. The tour operator includes a number of destinations and tourist products in their sales portfolio to minimize investment and operation risks while increasing sales and profits.

The main service suppliers for a tour operator are airlines for seats, lodging units, hotels and holiday villages for rooms and beds, ground operators for land arrangements, transfers, and tour operation at the destination as well as organization and conduct of sightseeing and optional tours. The tour operator prepares tours according to an expected future demand and projected sales that depends on past occupancy rates, sales figures and market research. The tour operator has stocks before the actual demand arises. In the competitive tour operating business, profit margins are low, especially in the mass coastal market. Some tour operators own principal companies in the production chain: leisure airlines, holiday villages, retail travel agencies and local tour operators, in order to decrease transaction costs between companies that produce components of the final tourist product. In this system of integrated tourism company structure, the parent company or tour operator, achieves economies of scale. Thus, the total cost of organized tours declines. The service suppliers owned by tour operators are subsidiary companies.

As already noted, the two main types of tour operators are holiday tour operators and specialist tour operators. The structure of these tour operators and the products they produce and sell are quite distinct. Although a few tour operators work both in the mass tourism market and also in the niche tourism market, there are differences in the client profile and the production sequence of tourist products offered. Since the products and clients differ, the services that form the components of the final consumption packaged product also differ. Hence the price of the tours, revenues generated and the profits earned also differ. The two main types of tour operators vary from each other with distinct company characteristics.

Table 4. Distinctions between Tour Operators

Holiday Tour Operator	**Specialist Tour Operator**
Big, foreign	Small, national
Leisure, mass market	Culture, niche market
Short haul	Long haul
Creates, diverts demand	Channels demand
Uses charter, leisure, low-cost airlines	Uses scheduled, low-cost airlines
Evades local operator, forms partnerships	Works with a local tour operator
Creates holiday / product image	Creates destination image

Works in culture market too	Works in niche markets
Works in monopoly conditions	Works in free market conditions
Sells through retailer network	Sells directly to public
Profits are low	Profits are high
High volume of sales	Low volume of sales
Sells standard identikit products	Sells diversified products
Single destination products	Multi destination products
Products are standard	Products are unique
Very competitive market	Less competitive market
Owns production, supply chain units	Seldom owns principal suppliers
Realizes physical investments	Does not realize physical investments
Some are multinational	National, domestic and international
Depends on brand image	Depends on expertise, individuality

Although there are distinct differences between the two types of tour operators, a specialist tour operator is a company that is an expert in a few niche markets, products, or destinations and that might invest and become efficient in the coastal mass market and transform into a holiday tour operator in time. Alternatively, an integrated international holiday tour operator might set up specialist tour operators to reap off the benefits of the niche tourism markets. A holiday tour operator includes niche operators in its horizontally integrated structure to provide niche packaged products and organize group tours. By reaching a new market segment, it widens its operations by marginal investments and increases profits competing with independent tour operators. In this respect, specialist tour operator's competition advantage and power diminish. The niche products are either inclusive or partly flexible, allowing independency to the tourist. As such, a cultural tour package organized for a destination might not include all sights and daily sightseeing tours, or some of the other services such as lunch meals to decrease costs and to provide flexibility to tour participants. As such, if all sightseeing activities are not included, then at the destination on the spot optional tours are offered. At the end of the standard group tour, side excursions, extension stays, and optional tours are offered to those who prefer to stay at the destination longer.

The integrated tour operator sells either resort holidays, group tours or individual tourist services to the final consumer through online booking and sales systems they own. Through user-friendly online reservation and sales-media the individual client can bring together different components of a travel arrangement and build a dynamic tour or travel package. Hence, clients who prefer niche products in accordance with their interests buy tourism and travel related services of their choice independently without being completely dependent on holiday or specialist tour operators and retail travel companies. Custom-made niche tourist product formation depends upon special interests, travel motivations and personal choices can be formed by dynamic tour planning and holiday packaging, yet via travel intermediaries. As beach holidays saturate and reach a sustained level at a destination for a holiday tour operator, it starts to work in the niche product markets such as culture, heritage, and faith tourism. Concurrently, the tour operator maintains a wider market segment through marginal investments. The international tour operator markets and sells different types of holiday products, such as resort holidays, faith tours, art tours, heritage tours etc., In the coastal mass market tour, operating is very competitive with very low profits. Therefore, in order to perform its functions efficiently at lower costs and to minimize transaction costs, the international holiday tour operator sets up an integrated company structure that service suppliers such as hotels, airlines, and ground operators and become an integral part of a giant corporations' production chain.

The specialist tour operator is an expert niche operator and usually a small-scale tour company providing certain types of organized tours and destination services. The niche tour operator specializes either in specific tours or on certain destinations such as Turkey specialist or Eastern Mediterranean specialist. It possesses extensive knowledge on the destinations and cooperates with local tour operators in the provision of ground services. The specialist operator has expertise in tours it produces, and recruits knowledgeable, experienced and professional staff. With such capabilities, it is able to compete with online distribution systems. The specialist tour operator makes use of travel media for marketing, and sells directly or through retailers. It also sells niche products through associations, religious groups, educational institutions, museums etc. The specialist tour operator organizes tours mostly for long-haul, distant destinations that the clients do not have much knowledge about. The holiday tour operator sells standard beach holidays, and works in the short-haul sun destinations. Hence, these two types of companies do not directly compete with each other. Niche products may be produced custom made upon demand. Accordingly, the cost of niche products, production, distribution, sales and operation costs, is high. Niche products necessitate an individual touch and individual intermediaries during the travel and holiday experience such as tour leaders, professional tour guides, etc., In the mass market, holiday tour operators employ a few representatives at the beach destinations. Due to the characteristics of niche products and those who demand them, as well as the necessity to employ more staff, niche tour operators' products are expensive. The types of facilities offered, and the tourism and travel related services used in rendering the products are different than that of a holiday operator. The holiday tour operator keeps its standard product prices low through scale investments and assembly line single-destination holiday production. The inputs of the organized products also differ extensively, such as use of network, low-cost or leisure airline and holiday village, resort hotel or city hotel etc., Also, tour operations both at the origin centers and destinations are quite different for each type of tour operator.

Although the client profile of the holiday tour operator and specialist operator differs, these two tour operators might offer to the same client a combined package with options such as a week of cultural tour and an extension sojourn holiday at a seaside resort. This is possible if the destination's natural resources, tourist products and services are diversified and both cultural, man-made and resource-based seaside resources exist at the same destination such as Mediterranean countries. Sun seeking holidaymakers prefer to buy all-inclusive holidays at a coastal resort. Wanderer travelers and culture tourists with quite varied interests and motivations prefer to buy differentiated organized tours. Niche tourist products are consumed by history enthusiasts, archaeology and art lovers, faith travelers, pilgrims, study and education seekers, heritage and old country visitors, golf players, and yachters and those who are involved in other sport activities. The niche tour operator caters to a small but wide spectrum of potential tourists. Niche products are either preorganized as a group tour depending on a minimum number of participants or upon demand as a custom-made arrangement for a small number of travelers. Foreign independent travelers are inclined to buy niche products, either via a travel agency or through internet travel companies.

Local Tour Operator

A local tour operator is both an intermediary travel firm and a producer of destination's land services packages for the foreign tour operator. As a destination-based company in the inbound tourism market, it is an intermediary between domestic tourism services and tour operators. It organizes and supplies ground services as a whole and sells it to the foreign tour operator as a packaged entity. It creates a local product package, and offers and sells it to the foreign tour operator. Different terms used for a local tour operator are incoming / inbound / ground tour operator.

A foreign tour operator can appoint a local tour operator for the organization of land services. The foreign tour operator is unfamiliar with the destination and cannot cope with all the details of ground services. The market and scale of a tour operation can be too small for the foreign tour operator to justify opening a branch office or there might be governmental and regulation restrictions. If it represents a tour operator as a corresponding agent / handling agency, it organizes, prepares and supplies land services package. As well, it operates land tours, performs transfer services, provides guides and organizes optional tours (Holloway, 1987:174). Briefly, in the inbound market, it handles tourists from arrival to departure. The local operator creates a land tour package, and offers and sells it to the tour operator. Therefore, it takes risks as it is not solely an agent between tour operators and suppliers at the destination, but a producer functioning like a tour operator.

A local tour operator contracts to buy destination services, checks quality of local services rendered, organizes familiarization tours for tour operator's sales personnel, and information tours and inspection trips for managerial staff. Finally, a local tour operator gives advice on destination services, makes suggestions on travel itineraries, proposes new itineraries and tourist products, provides up to date information on destination facilities and travel related services such as a new hotel, airline schedule, museums, sites, recreation facilities, their prices, fares and rates. The local tour operator also works in the outbound and domestic tourism markets. In the organization of inbound, outbound and domestic markets, it is a producer in the same way as a tour operator. It mostly prepares and operates tours for niche markets such as cultural tourism, faith tourism, urban, city tourism etc. As well, it acts as a travel agency supplying services of the principals as an intermediary. Briefly, the local tour operator is an intermediary travel company acting like a travel agency, a producer of land services packages in the inbound market, organizer of domestic tours and outbound tours like a tour operator, and undertakes risks in organization, sales and operation.

An information sheet can be prepared and made available as a website information source or can be conveyed in another suitable format.

The functions of travel agencies and tour operators differ. A travel agency is an intermediary and retailer. Though so, a travel agency might as well produce limited packages for small groups, foreign independent tourists, and individual travelers. On the other hand, a tour operator is a producer and in some cases a principle for other tour operators and also travel agencies. A travel agency sells tourist products and services in return of a commission whereas a tour operator sells organized tours and resort holidays in return for a profit. A travel agency sells tourist products and services when there is a demand, but a tour operator produces tours for an expected demand ahead of time; well before there is an actual demand. Therefore, a travel agency does not have any risk in selling its products. A tour operator has risks of selling the products it prepares, as it realizes advance reservations in the form of bulk-purchases, future-buying and makes partial payments during reservations. A travel agency gives information and counsels. A tour operator affects holiday destination choice directly by offering low rates, multiple destinations and alternative products. A travel agency works within national borders, and integrated tour operators are multinational corporations. A travel agency acts as a retailer or intermediary of the travel industry, and benefits from suppliers and principal tourism company services that are already available. In this respect, a tour operator is at the same time a supplier for a travel agency. If a demand arises, a travel agency creates partial organized tours for small parties by supplying inclusive services either in co-ordination with a tour operator or independently.

IV Tour Guides as Professionals

The tourist experience includes a bundle of services and products consumed at the destination and interactions with the host community. The main tourism services are accommodation, travel, tour operating, tour guide services, transportation, catering, recreation, and tourist attractions. Tour operators and tour guides are important stakeholders in the production and consumption of organized trips, respectively. In conducting organized tours, a professional tour guide is the main contact with clients and a valuable asset for tour operators (Howard et al., 2001). A guide's performance is closely associated with the quality of various complementary tour package components (Wang et al., 2000) and the reputation of the tour companies they represent (Heung, 2007). The tour guide is usually a local who leads visitors to tourist spaces and interprets the sites visited. In organized cultural tourism, the guide is accountable for a favorable holiday experience. A guide is usually a resident who holds a license issued by the local authorities and works on behalf of travel firms for a wage or salary.

Tour guides are usually locals that lead a group of visitors while interpreting the sites. They are major stakeholders in the tourism system and tour operation. While tour operators create and organize the tours, tour guides execute them. Tour guides are not only responsible for information provision but also for the flow of the tour as promised by the tour organizer (Cetin and Yarcan, 2017). Representing the tour operator, tour guides are also considered as frontline employees mediating between customers, service providers and the locals (Ap and Wong, 2001) during a tour. As an important part of the tourism system a tour guide represents the local culture, area, country and the hosts. The guide has a significant influence on the image created in the minds of the participants concerning the locality (Ap and Wong, 2001; Yarcan, 2007). The guide is also the bridge between different cultures (Cohen, 1985; Yarcan, 2007).

A tour guide representing locals creates an image of the destination (Huang, Chan and Hsu, 2010) and minimizes barriers associated with language (Wang, Hsieh and Huan, 2000) and unfamiliarity. Hence, tour guides also work as the mediator between the tourists' and host's culture. According to Cohen (1985), the mediating role of a tour guide includes two components: social mediation and cultural brokerage. Social mediation involves helping tourists construct and thus make sense of their experiences, linking tourists to the local population and to tourist sites and facilities, and making the host environment non-threatening for the tourist. Cultural brokerage, on the other hand is about helping tourists connect with the host culture (Ham, 2002; Tilden, 1977). Cultural mediation is considered by Cohen as a primary role of the professional tour guide and as a vital process for the quality of tourist experiences in a guided tour (1985).

Tour guides do not only possess specialized knowledge of the destination but also need to disseminate the information in an understandable way. Therefore, guides need to have good communication skills and a sense of humor to turn information processing into an enjoyable activity (Cohen and Ifergan, 2002). Icoz (2000) claims that the information conveyed by specialized tour guides are more easily absorbed by tourists. Tourists select guided package tours in order to learn the cultural and historical values and norms of local cultures (Sahin, 2012). Consequently, guides and their services have an important role in creating tourist experiences in tourism (Cohen et al., 2002). The relationship between the guide and the participants is close and personal during the tour. Tourists rely on guides for better experiences and they tend to trust their guides.

Although guides are an important part of the commercial tourism industry, research on guiding has received low attention. General tourism books do not either consider guides worthy enough to devote some pages on the issue, and only a handful of academic books have so far published on guiding. Tour guiding for free independent travelers and tour operator clients bring about different responsibilities. Although both topics will be evaluated, the focus will be on organized package tour clients and tour operators collaborating within the scope of the study.

Definition and History

There have been different definitions of a tour guide. WFTGA (World Federation of Tourist Guide Associations) defines a tour guide as a person who guides visitors in their choice of language, interprets the cultural and natural heritage of an area and mostly is expected to hold a certificate issued or recognized by local authorities as a proof of his/her profession and expertise (WFTGA, 2003). According to EFTGA (European Federation of Tourist Guides) a tour guide guides groups and individual visitors from abroad or from the home country around the monuments, sites and museums of a city or region: interprets in an inspiring and entertaining manner in the language of the visitor's choice, the cultural and natural heritage environment (EFTGA, 1998). The Travel Industry Council of Hong Kong (TIC) defines a tour guide as a person assigned by a tour operator to accompany and take care of its customers. The Turkish Ministry of Culture and Tourism defines the guiding profession as someone who is issued with an authorization document who informs local and international tourists on the characteristics and history of cultural and natural heritage of the locality in the language that is stated on their guide identity cards and which tourists choose before the trip. According to the same definition, guides shall also make sure the itinerary is operated as defined, detailed and sold by the tour operator and travel agency documents and leads the trip itinerary on behalf of the tour organizer (Resmi Gazete, 2005). Therefore, the primary objective of the guide is to operate the tour on behalf of the tour organizer and inform the participants of the tour. Although different definitions are used, the common shared themes in these definitions are that a guide is a person who is expected to communicate with and inform participants about the destination in an efficient and interesting way. Most guides have a license issued and/or recognized by local authorities, they also mostly work with tour operators either part-time or full time, in exchange for a wage or salary.

Tourist guides are acknowledged as people who lead and show the way for a visitor, in an unfamiliar environment. The guide also supplies information of interest to the traveler and shows the ways of conduct. Therefore, a guide can be defined as both a pathfinder and mentor (Cohen, 1985). The early guiding profession had mainly a pathfinder role. The pathfinder guide (geographical guide) was mostly locals without formal training but in possession of a very good knowledge of the local environment. The pathfinder guide still exists and serves alternative travelers such as hunting, mountaineering and bird watching. On the other hand, the mentor guide also has an ancient history. These can be interpreted as tutors, gurus and religious socialists that provide insight, knowledge and linkages between the environment and life. Their role is more spiritual as well as geographic (Cohen, 1985). From ancient Greek onwards, guides which were then called exegati (explainers) were professional storytellers like stand-up artists, and they were used to tell their stories in exchange for coins (Wynn, 2005). The Grand tour (17th century) is considered as the first appearance of guides in the tourism system. These guides as mentors accompanied upper class youngsters during their educational trips mostly within Europe (Cohen, 1985). As the organized package tours were developed and flourished so did the tour guides accompanying them. Today, tour guiding has become not only a recognized profession but also a discipline in academia offering formal education.

Certification and Categories

The service quality and professionalism of guides have recently been subject to various research (Ap and Wong, 2001; Heung, 2007; Mak et al., 2011). Tourist guide accreditation, licenses and their education are becoming important issues that destinations have started to recognize. In Turkey, in order to become a licensed tour guide, the prerequisite is to have a Turkish Nationality, pass a proficiency exam in a foreign language, complete 6 months of theoretical education and attend a monthly practical tour before passing a comprehensive final exam. There are also university programs (minimum two years) that offer the opportunity. Yarcan (2007) suggests tour guide education should be offered by at least a four-year university program.

The guide trainings should cover three main topics: the destination and product knowledge, language skills and interpretation ability (Weiler and Ham, 2002). Customer service, leadership and group management and communicating across cultures are other challenging issues for guides besides various other generic subjects such as Law, Political Science, Economics and so on.

Certification in some countries is voluntary, but a license is becoming an industry standard and a legal requirement in many countries. There are two main approaches to certification of guides: the government or professional organizations. In the case of the government, the requirements and implementation are stricter and supported by laws. The government obligations also integrate responsibilities of all stakeholders under legislation. Especially in the monitoring stage, non-governmental organizations lack authority and man power to check on guides and audit the tourism trade. In case of discrepancy with the legislation, the local authorities usually have the right to suspend or cancel the guides' license (Mak et al., 2011).

The professional that accompanies participants in a package tour, assisting, leading and informing participants on behalf of the tour organizer have also been called a tour leader, tour manager, tour representative, transfer-man as well as tour guide (Holloway, 1981; Yarcan, 2007). Yet, there are some distinctions among these posts. Tour leaders for example usually accompany a tour group and are responsible for the flow of the tour. Because they are citizens of the origin country, they seldom have extensive knowledge about the individual sites visited. They audit whether the itinerary is executed as planned and report and ruminate by the foreign tour operator. Tour representatives, also referred to as hotel representatives, are designated staff of the tour operator at specific hotels, who welcome and assist guests. They also promote extra services and excursions and sell these in exchange for a commission. Transfer-men are staff assisting guests usually during their land transportation to/from the airport. Different than other related positions, the tour guide is not only responsible for information dissemination but also responsible for execution of the tour itinerary with maximum satisfaction for all stakeholders including tourists, the tour operator, suppliers and locals.

Tour Guides in Tourism System

The tour guide ensures the provision of tourism services, coordinating different package tour components and services by acting on behalf of the outbound tour operator (OTO) and the inbound (local) tour operator (ITO) (Dahles, 2002; Pond, 1993; Yarcan, 2007). In order to produce a packaged tour, the OTO cooperates with the ITO. The ITO usually realizes pre-tour arrangements, gathers prices and rates, and reserves guides and other services based on the developed itineraries and coordinates different suppliers at the destination on behalf of the OTO. A tour guide takes care of the more intangible tour elements and ensures that the tour operators' promises are realized (Geva and Goldman, 1991).

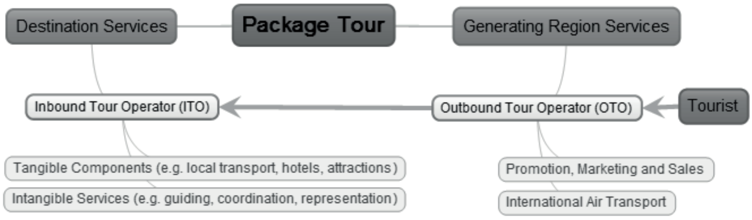


Figure 1. Package Tour Operation System
Source: Cetin and Yarcan (2017).

The guide is normally employed by the tour organizer and is an indispensable member of the tourism system both in urban destinations and suburban regions. They are representatives of the company and they influence customers' decision whether to buy the next tour from the same company (Gronroos, 1978; Heung, 2008). These are two conflicting stakeholders that need to cooperate as well. A guide is defined as a knowledge holder and provider, instructor, cultural broker, translator, entertainer, actor, storyteller, missionary, mentor, pathfinder, middleman, intermediary, buffer, care taker, organizer, salesperson, shepherd, decision maker and a leader responsible for the smooth operation of a tour. Thus, a guide has a variety of professional roles that depend on their audience. The power relations between different stakeholders in the tourism industry influence the roles of guides. A tour guide is responsible for conducting the tour itinerary smoothly on behalf of the tour operator. A guide introduces the destination and the hosts to the clients, coordinates the tour and handles potential problems. (Mak et al., 2011; Schmidt, 1979; Zhang and Chow, 2004). They are also interpreting the characteristics of the host region and mediating between the cultures (Ap and Wong, 2001). They are also ambassadors representing the host region and are a tool in supporting political missions (Pond, 1993). Although considered important by all stakeholders, the guides, their role, finances, job security, working conditions and their standards are often neglected by the industry (Pond, 1993; Mak et al., 2011).

A guided tour is a convenient product that enables tourists to visit and comprehend the destination characteristics in a short time at low cost (Cohen et al., 2002). The organized tour is a means to prevent visitors from encountering problems an individual traveler might face in an unfamiliar environment (Schmidt, 1979). Tour group members satisfied with the guiding services trust the guide, build an emotional connection with the guide and accept the guide's leadership (Geva and Goldman, 1991). Therefore, tour operators are very much dependent on guides for the creation of an enriching holiday experience. A guide works within a power relationship between the tour operator and visitors while performing the service on the tour operator's behalf. The performance of a guide is influenced by the tour operator's policies and requirements, which are usually beyond the control of the guide (Ap and Wong, 2001). While consuming the services included in a package tour, clients are beyond the reach of tour operators. Thus, it is usually hard for a tour operator to control guiding quality and representation.

Group package tours have a large pie in tourism services. However, there is little research on the role of a guide on package tours (Wang, Hsieh, and Huan, 2000). The tour guide is a very important component of group package tours. Guides can also serve as a revenue generator, selling other tours and extra services. A guide is also the main contact between the tour operator and traveler in a package tour. Therefore, the performance of the guide will easily be associated with the quality of the other services the tour operator supplies in general (Wang, Hsieh, and Huan, 2000). The quality of service received by the tour guide can make or break the tour (Quiroga, 1990; Schmidt, 1979). The main problem here is that the guides performance is mostly outside the control of management. The guide is in closer contact with the client and for longer period of time. The guide has the power to manipulate events and has more power to control the interaction than the tour operator (Wang, Hsieh, and Huan, 2000).

Tour guides also act as marketing communication tools. According to Wang, Hsieh and Huan, (2000) presenting a tour guide in tour brochures might create more complete and tangible evidence about the product. Experience with the guide effects future patronization with the same company (Schmidt, 1979).

The clients' evaluation of the tour depends very much on the guides ability to satisfy the needs of the participants. The leadership and organization capabilities of a tour guide are important features for a travel agency as well (Hughes, 1991).

If the group is satisfied with the leadership of the guide, they tend to trust the guide and an emotional connection develops between the guide and the participants. Generally, no such connection is possible between the tour company and the customers. Hence a tour operator is highly dependent on the guide to reach satisfaction of the participant and if something goes wrong, it is one of the responsibilities of the guide to solve problems and handle conflicts.

However, most of the time the failure is attributed to the tour company (Geva and Goldman, 1991). Customer satisfaction is considered as one of the main duties of the guide and tour organizers reward guides based on their performance to achieve it (Geva and Goldman, 1991). The survey data collected by the tours at the end of the tour are analyzed by the tour operator. This is why tour guides might try to achieve high scores on these by being nice to groups at the expense of the image of the company. Therefore, in the case of failures, the tour organizer is more likely to be held responsible in the absence of his presence. Therefore, the critical issue is the motivation of the guides. They need to see themselves as representing the company rather than pursuing individual self-interest. They must invest a special effort to protect and enhance the company's image for future purchases and recommendation. Most tour companies hire the guides for a specific tour and pay the team a daily salary plus expenses. There is also a commission involved based on extra tours and the shopping volume of the customers. Some companies also reward guides based on their performance on customer satisfaction metrics they use on customer surveys. Some other guides might prefer to become a full-time employee of the tour operator and be paid a wage.

The reward bonus given based on customer satisfaction survey results to the guides might be tied to the overall company image, recommendation and intention to repurchase rather than the individual performance of the guide. The position of the guide as the company representative should be emphasized as well as the presence of the company during the tour (Geva and Goldman, 1991). The driver can also be used to consult what actually happened.

In a harsh competitive environment fees and wages are subject to negotiation. During low seasons tour guides are urged to work for fees well below the minimum level or without any payment at all. Only a few guides would survive without the additional income from optional tour sales and shopping (Ap and Wong, 2001). Mak et al. (2011) propose that tour guide performance is adversely affected by the operational policies of the travel industry. Unhealthy business practices lead to detrition of priorities in guiding profession. These unhealthy practices have also been discussed by other authors (Ap and Wong, 2001; King, Dwyer and Prideaux, 2006; Mak et al., 2011; Zhang and Chow, 2004; Zhang, Heung and Yan, 2009). There are two principal practices concerning the rate in this category: the customer price of the tour which is set by the tour operator and the price the ground handler supplies to the tour operator in exchange for handling the group. If any of these is below costs then the parties seek additional finances from commissions. The handling fee has to be matched to the advertised rate, and in order to receive the group, some handling agencies in the destination do not charge any fee and even bid money to get the group. That way the ground handler predicts the money he will earn through sales and extra tours. Since handling agencies incur some costs before making any profit, they first try to minimize costs on the wages of guides and pressure guides concerning shopping and extra tours. Tour guides are than pressured in order to meet the financial objectives of the tour in order to earn a living (Mak et al., 2011).

Because of the stress of selling optional tours and increasing the shopping volume of the participants, the interpretation and leading of the group as a core service of the guide becomes a secondary role. In order to cope with the financial burden, tour guides become sales persons rather than information providers (Mak et al., 2011). The need for extra shopping affects the motivation for guides as well. In the case where the purchasing power of participants is low, i.e., if they are not willing to buy or not interested, the guide might behave in a bad emotional way (Mak et al., 2011; Van Dijk, et al., 2009; Wong and Wang, 2009).

Low tour fares and price insensitivity of demand are other issues in some markets; the competition is so harsh that most organizations should accept very low margins to attract customers. For cultural tourists in general this situation is much better than sunlust tourists but the price is still a very important variable for some markets. When a low price is offered to the market to attract tourists, this rate is likely to be supported by minimizing the costs and this is reflected in the choice of the guide to minimize expenses and maximize sales. When the tour guide wage is held at a minimum the guides are likely to be forced into a sales person role in order to earn a proper remuneration (Mak et al., 2011).

One of the crucial elements of guide tour operator interaction is trust. Trust is an important virtue for guides from both the Tour operators and participants' perspective (Yarcan, 2007).

There is a continuous information flow between the guide and the tour operator before during and even after the tour. The guide is expected to give feedback concerning incidents, suppliers, and customer satisfaction in both vocal and written forms. The important issue here is that tour guides are rarely involved in the design of the tour (Karamustafa and Cesmeci, 2006). The cooperation between the tour organizer and the guide is crucial. The ideal situation is where the guide and the travel agency collaborate in designing the itinerary, choose the suppliers and share information about the profile of the group (Yarcan, 2007).

Roles of the Tour Guide in a Package Tour

Different authors (e.g., Cohen, 1985; Holloway, 1981; Schuchat, 1983) have examined the roles of tour guides in different settings. The common themes shared in the literature are supplying information, ensuring safety/security, giving directions and advise, leading the group, facilitating interaction among group members and the environment and entertaining the group while educating them. A tour guide, as a leader, also initiates social interaction and minimizes conflict within a tour group, which requires emotional intelligence, conflict resolution capability and skills in managing group dynamics (Cohen, 1985; Holloway, 1981). Ensuring there is entertainment, humor, animation, group cohesion, discipline and morale is a *social* guiding role (Cohen, 1985). Conveying information and knowledge is a significant *communicative* role (Cohen, 1985; Holloway, 1981). It is important to identify the gaps between tour operators' perceptions and compare it with the guides' perspectives. Identifying the gaps is the first step in solving the problems.

Cohen (1985) discusses four main roles of the modern guide: instrumental, social, interactionary and communicative. The instrumental role of the guide includes the smooth flow of the tour. The social role is related to his/her personal relations with the group and establishing a cohesion within the group. The interactional sphere includes relations with locality including interactions with the hosts, touristic facilities and so on. Finally, the communicative role refers to dissemination of destination related information. The importance of these roles and the guide functioning as a middleman (mediator / culture broker) between the destination and tour participants have also been stressed in other studies (e.g., Cohen, 1985).

The instrumental role: Organization and management of itinerary, direction giving, navigation, safety.

The interactional role: Monitoring interaction with locals, representation of the area to travelers.

The social role: Social interaction within the group, humor, entertainment and group discipline and leadership.

The communicative role: Selection and translation of the sites, interpreting environment, dissemination of information.

The leadership role of the guide can be divided into instrumental and social leadership. The instrumental component of a guide's activities includes performance related to the smooth operation of the tour itinerary. The instrumental component here includes direction; the guide is responsible in leading the group in a way that spatially complies with the itinerary. This also includes selecting among alternatives and choosing the way. Orientation skills become important to accomplish the direction role. Previous knowledge of alternate routes and alternate points of interest are crucial in attaining this role. Another important part of the instrumental leadership role is access; the guide is supposed to lead the group into different geographical and social spaces. These include touristic places as well as back stages and non-public areas. The final role that is considered under instrumental leadership is control. The guide is responsible for the safety and wellbeing of the participants, i.e., carefully choosing the route, holding the group together, setting the correct pace, and keeping within the time table (Cohen, 1985).

Table 5. Roles of Tour Guides

	Outer Directed	Inner Directed
Leadership	Instrumental	Social
Mediation	Interactional	Communicative

Source: Cohen (1985)

The social component of the leadership role relates to emotional, conflict resolution and group dynamics such as morale and cohesion of the participants. The guide should be able to manage the tension within the group members. Since tour groups usually consist of people who have not yet met and have different personalities and priorities, conflict may emerge among group members. The guide is supposed to prevent, intervene and minimize the tension when he sees a potential. Another role is the integration of different participants and creation of a social cohesion (Cohen, 1985; Holloway, 1981). The guide is also responsible for the morale of his group by using jokes and humor where suitable (Cohen, 1985). The final component of the social leadership role of the guide is animation. The animation role includes encouraging tour participants to join various activities in the destination (Cohen, 1985).

Under mediation there are two main components: interactional and communicative. The interactional component is related to the guide being a middleman between the participants and hosts, the tour operator, suppliers and other environmental factors. The interactional component firstly includes representation; the guide represents the link between the local environment and the participants. He also represents the client to the environment. Therefore, he is also responsible for proper organization of the tour based on the itinerary. This includes provision of services as promised. He is also responsible to fill in the blanks in the itinerary. For example, if lunch is not included, he is responsible for arranging or suggesting alternatives. Or if there happens to be a medical problem, he is responsible for making necessary arrangements and adjustments. In mature destinations and established tours, the level of unsettled arrangements is lower (Cohen, 1985). The second main component under mediation is communication. This is the most frequent mentioned role of the tour guide (e.g.,, Cohen, 1985; Holloway, 1981). It includes selection, information, interpretation and fabrication. Selection is basically choosing points of interest. This role seems simple; however, considering different motivations the guide should pick items that are worthy of attention depending on the groups' profile. The selection process is also influenced by the guides own preferences and taste, the directions received from the tour operator and his background. The other side of this coin is selecting items that will not be seen by the participants. Thus, the guide has a manipulative power on the content of the tour. Another important dimension of the communicative role is information. Various researchers defined guides as information givers, teachers and instructors. The guides usually do have an extensive knowledge about the site (Cohen, 1985; Holloway, 1981). The information, except for real data about dates, measurements etc., can be distorted and subjective and could be manipulated because of political concerns (Cohen, 1985). Another role under the communicative dimension is interpretation. This role basically relates to transformation of information into a format that participants can understand and relate to. This is why tourist guides are expected not only to possess and extend knowledge about the host culture, but should also be familiar with the clients' cultural background. This role is also referred to as a culture broker by various authors. Interpretation usually comes with experience (Cohen, 1985). The final factor under the communicative component is fabrication. Fabrication is a controversial component since it involves deceiving customers. Examples include: creating fakes as genuine antiques during shopping tours, changing the contents of the itinerary, pretending no change has been made, and lying about operational errors, closing and opening hours, safety and security, exaggerating the qualities of a product etc.

The role of the pathfinder is dependent on the instrumental role; however, the modern guiding is built on communicative activities. The institutionalization and development of the tourism system in the area has a significant effect on the role of the guide (Cohen, 1985). Some tours that are still sold to explorers, hunters, and adventurers to mostly natural areas are still not institutionalized. The role of the guide in that case is to lead the path into a strange, unfamiliar and potentially dangerous area. Another reason they need the pathfinder guide is the hosts living in those areas do not speak the language of the tourist and the service facilities are inadequate, so the guide deals with the natives to acquire some of the services such as accommodation (Cohen, 1985). They operate mostly in geographically remote areas with limited accessibility. These pathfinder guides are usually natives, they also speak a basic foreign language and to an extent they are familiar with the visitors' culture and needs. The guiding is not formal and these pathfinders acquire their knowledge through experience and living and working in the area. They do not normally hold a license (Cohen, 1985). However, as the destination moves along different stages of the destination lifecycle from introduction to growth, these explorers are replaced by a larger amount of people who are less interested and more demanding. Tours become commercialized, standardized and professionalized using organizational service providers. In this stage the skills of the pathfinder are less required (Cohen, 1985).

More professional, communicative guides enter the field to satisfy the changing client profile. The professional guide serves regular organized travelers rather than travelers with special interests. Their tours are more routine, sometimes back-to-back. They work for large travel organizations such as tour operators that create standardized packages and market them to the general public. The role of the guide is limited as the division of labor is extensive for these mass tours. These tours might also be accompanied by a tour leader who is also experienced in the area and services in general, therefore the role of the guide is further limited. The professional guide in this case is more involved in the communicative and interpretive dimensions of his role (Cohen, 1985). Examples of this include: punctuality, ability to solve problems, knowledge of the destination, honesty and trustworthiness, informing about safety regulation, delivering the service promised in the itinerary, politeness, good presentation skills, being well trained, briefing visitors on the daily itinerary, respecting customers, communicating well in a foreign language, friendliness, generating a friendly atmosphere, appearing neat and tidy, being always available to help, paying attention to detail, informing visitors about destination customs, introducing reliable shops, and having a sense of humor (Cetin and Yarcan, 2017).

Conclusions

Some of the roles of the guides are competing between the community they belong to, the tour organizer and the visitors. Visitors expect guides to facilitate and improve their experience and make it more rewarding. Tour organizers as employers require guides to meet the expectations of guests while maintaining the flow of operation as well as increasing profit margins. On the other hand, a guide is also a member of the local community and is expected to protect the local environs and local culture from damage. The last role is the most obvious in natural and cultural tours. Therefore, guides are in a critical position to balance the needs of visitors, tour operators and the destination (Weiler and Ham, 2002). However, the guides also need to satisfy their own needs. The work of the guide is mostly seasonal, freelance and there is no social security involved. Most of the time the guide is on the move so family life is hard. While their role in making or breaking the tour is well recognized, this importance has not been respected in the society nor within the industry itself. The structural problems of guiding, such as seasonal employment, freelance employment without social security and the short-term duration of professional activities, appear to affect the guides' identification with tour operators and their dedication to tour participants' satisfaction.

The guides do not view themselves as employees of tour operators and are not affiliated with any single tour operator. A major reason why guides do not willingly comply with tour itineraries might stem from the selection of the sites and the predicted tour timings, both of which are sometimes planned completely disregarding the needs of clients and guides (Dahles, 2002). Package tours usually involve catering to tourists with different backgrounds and motivations, therefore the sites to be visited as well as visit durations are regular sources of conflict (Wang et al., 2000).

Tour guides are rarely involved in the design of the tour (Karamustafa and Cesmeci, 2006). The ideal situation would be one where the guide and tour operator collaborate on the itinerary design process and share information about the profile of the tour group (Yarcan, 2007). The tour guides' and ITOs' continued existence depends on each other's mutual success. Guides should not be evaluated only by satisfaction surveys filled by the clients on guiding services, but the clients' overall rating on the services of the tour company should also be accounted for. A highly motivated guide would also supply valuable feedback on the itineraries, suppliers and customers that would be instrumental in improving tour operator services in the future. A tour guide might also garner future business by briefing tourists about other available tours and services offered by tour operators.

Illegal guiding activity is a major drawback both for the licensed guide and the ITO. The supply of unlicensed guides has an adverse effect on the employment of legitimate guides and their wages. The work of the guide is mostly seasonal and freelance without any social security net.

While their role in making or breaking the tour is well known, the importance of guides has not been recognized either by society at large or within the tourism and travel industry. Guides do not have the power to control their professional future; they depend on the goodwill of other stakeholders such as tour operators and the government to solve the problems that they face in guiding (Ap and Wong, 2001).

V Dichotomy in Tourism Education

Tourism as a labor-intensive service industry that depends on the availability of good quality personnel to deliver, operate and manage the tourist product (Amoah and Baum, 1997), as well as to develop the destination and its products. Tourism personnel are a link and intermediary between the service and the consumer, i.e., the tourist. Despite many graduates, the number of graduates employed in the industry with a tourism degree is very limited. Such a case is not peculiar to Turkey. Tourism employers often recruit non-tourism graduates who are able to demonstrate the generic skills required for avocation in tourism (Dale and Robinson, 2001), which is an indication that there are discrepancies between tourism schools, departments and the tourism industry and tourism professionals. The number of vocational tourism schools and undergraduate degree courses as well as graduate programs in tourism education in Turkey has been increasing continuously. Yet tourism educational institutions do not fully cater for the needs of a very diversified tourism industry and its sub-sectors. The problem for tourism departments at the higher education level and tourism graduates is finding proper employment and recruitment opportunities.

The difference between two-year vocational schools and four-year degree programs are not known nor acknowledged by tourism industry members. The schools / departments are not able to make themselves known by the tourism industry. Vocational education and theoretical degree education are viewed at the same level of education by tourism employers. The identity and curricula of tourism schools are not acknowledged by tourism industry members since there is a gap between the two parties. Relationships between the educational institutions and tourism industry professionals are not fully set up (Okumuş and Yağcı, 2005). Academics lecture on theoretical topics and neglect the practical applications and applied science character of tourism. Tourism education has not kept pace with the changing nature and diversity of the industry (Dale and Robinson, 2001). Tourism education somehow should be linked with the industry and the needs of the industry; manpower requirements and training needs of the tourism industry should be identified such as certification of tourism personnel. Consequently, tourism education should be on specific issues and topics related to the needs of the industry. Tourism is an applied field of study as evidenced by the names of tourism schools. Earlier, most tourism schools in higher education were called tourism and hotel school (tourism meaning travel trade and hotel meaning lodging and accommodation establishments). Currently the trend is to call tourism schools as tourism administration, management department or faculty in line with curriculum changes such as including recreation, leisure, transportation, air transportation, ticketing, marina management, cruise organizations, yacht tourism, meetings and incentive travel etc., within the education system. The trend in tourism education is towards developing a curriculum with emphasis on themed tourism related areas. Hence, the generic names for tourism education institutions at university level, like tourism administration departments, schools, and faculties, are in accordance with the diversified nature of the tourism industry. Professionals and employees in the industry do not credit tourism departments easily since most of the top-level managerial staff are hotel school graduates. The other topic of concern between the academic institutions and tourism professionals is that tourism related companies and employers do not fully discriminate between tourism education graduates and general management / social sciences degree graduates and employ graduates from other sciences. The professionals emphasize the need for foreign language competency. For the practitioners who recruit tourism graduates and who hold similar degrees, it is difficult to distinguish between different degrees and the quality of education (Dale and Robinson, 2001).

The aims of tourism education are: keeping the industry abreast with staff, providing available replacement staff, raising the image of careers in tourism, staffing new and growing tourist industries, regulating employment, reducing foreign labor and responding to service and communication requirements of the customer (Amoah and Baum, 1997).

The extent tourism education provides the means to meet these requirements is a discussion topic. Whether the aims of tourism education institutions coincide with that of employers and professionals in the tourism industry is also a subject of evaluation. First of all, there is a gap between the practitioners and tourism academics (Jenkins, 1999). There is a considerable gap between the academia and the needs as expressed by the members of private sector tourism industry members. Here, this section deals with the needs of national tourist offices and public bodies partly. The publications of academics are unlikely to be of interest to practitioners. The scholarly publications are delayed due to the review process and thus out of date for use by the industry professionals (Jenkins, 1999). Unless the academic is also a practitioner, e.g.,, in the sense of consultancy work, the use of theoretical knowledge of the academic and its influence is limited for the practitioner (Jenkins, 1999). The practitioners formulate and implement the policies and decisions. As the final aims of scholars and practitioners do not coincide, academia has little influence on practitioners, if there is any at all. The linkages between the tourism industry and academic research on tourism related topics is quite poor. Communication between the academia and practitioners is limited due to a number of reasons (Jenkins, 1999).

Academics and tourism researchers have advanced knowledge and understanding of the subject, disseminate information through teaching, publications and conferences, educate and influence students, other academics and the industry to a certain extent.

Practitioners and consultants work in a contractual, project-specific and profit-driven environment, disseminate information through project-specific reports, plans and studies, aim to develop their expertise and reputation to secure further work.

The nature of tourism education in Turkey is highly vocational. Hence, research opportunities are limited and research is not demanded. The vocational nature of research is not accepted by the academic environment and conceptual / theoretical works are required (Go, 1994). Tourism is viewed as a subject that lacks academic credibility compared to other social sciences (Dale and Robinson, 2001). Hence, tourism is not widely accepted as a scholarly subject to study. As noted, academic research goals do not coincide with that of the practitioners. The research conducted is very rarely relevant to the industry, despite the operational use of research, policy implications, recommendations, further research sections included almost in all scholarly journal articles and conference papers submitted in academic meetings. Tourism knowledge acquired by research should be made available in a usable format for the practitioners (Xiao and Smith, 2007).

The academia has its own language and vocabulary suited and used in scholarly publications. Such publications are not useful for the practitioners. The vocabulary is highly academic and the outputs are not relevant for the use of tourism industry professionals (Xiao and Smith, 2007). Also, the practitioners cannot access the scholarly journals and conference proceedings. Even if so, the outputs of these media are not useful for the private tourism enterprises. Practitioners rely on their own past experiences for day-to-day operations, management and future planning, rather than on research (Xiao and Smith, 2007).

The academia does not have the flexibility and resources for consultancy. Hence, academic institutions cannot compete with private consultancy and research enterprises. Also, there is the problem of objectivity. It is difficult for the academic researcher working on behalf of the private tourism enterprise to be completely objective. On the other hand, there is not a knowledge transfer between the parties. Interaction between the two parties is limited. There is very limited demand from the tourism industry to produce knowledge that might be beneficial for practice. For the knowledge to be disseminated, first of all the knowledge should be created for use. Then, the knowledge created through research should be converted into teaching material. In most cases tourism industry employers demand information on tourism statistics, surveys on tourists, tourist behavior, tourist experiences, destination characteristics and partly on marketing (Cooper, 2006), as well as tourism image, the quality of destination services, that are all actually geared towards marketing and sales of tourist products. The diversified nature of the tourism industry with so many small and medium sized enterprises does not allow these companies and entrepreneurs to demand research from academic institutions. Also, there are other limitations that hinder academics from conducting research on practical aspects of the industry. Tourism education and educators have very limited linkages with the industry. Academics are not very much aware of the needs of the tourism industry and tourism professionals. The lack of links between the tourism industry and the academia limits research opportunity. It also prevents efficient knowledge transfer between the academia and practitioners (Cooper, 2006). Specialization in tourism education can contribute to building closer relationships between employers and academia (Carvera-Taulet and Ruiz-Molina, 2008).

Another issue relates to the fact that tourism is not fully viewed as a discipline in itself. Even for some universities, tourism is not recognized as an important field of education and study, given the vocational nature of the field. Educational institutions emphasize general subjects, whereas the industry demands education on specific topics and requires specialized personnel skills. Vocational tourism education should be business oriented, relevant to the industry and should be supported by industrial training (Collins, 2002). Its diversified nature makes it difficult to identify the needs of the tourism industry. Educational institutions need to emphasize the diversified nature of the tourism industry and its specific topics that need to be addressed. Joint cooperation and collaboration with tourism industry enterprises and professionals is one of the methods to reach such an aim. There exist a few other bottlenecks in tourism education that need to be solved. One of the often-stated issues is lack of qualified academics (Okumuş and Yağcı, 2005). Lack of qualified and experienced teaching staff with industry experience is a main problem in tourism education. Learning by doing, on the job training and application are advised to the students whereas, the academics do not have such merits. Practitioners should be invited to participate in tourism meetings and to freely express their views. Four-year undergraduate schools, departments and faculties cannot easily employ private or public tourism professionals as part time lecturers. Academic institutions, at their best, should be able to benefit from practitioners as part time lecturers and include them in the education system through advisory bodies. Course development plans may be realized in accordance with the needs of the industry, internship and on the job-training scheme programs can be planned, organized and applied. Thus, easier recruitment of the graduates can be maintained. The benefits outlined are mutual for all parties.

There are locational disadvantages for some schools that are far away from the main destinations, tourist receiving regions and developed cities where the infrastructure and tourism superstructure are readily available. At remote regions interrelationships between the education institutions and the tourism industry cannot be set up. Concurrently, internship, industrial training and recruitment of graduates cannot be realized efficiently. Also, the curriculum should take into consideration the physical environment that the school or department is located in. Such as whether mass tourism or urban tourism is the dominant tourism type in the region where the educational establishment is. Tourism, a modern industry with western standards, contributes to change and modernity in the society. In line with this view, tourism education should be concentrated at urban areas that are developed and western norms prevail within the society for the students to adapt themselves to the western society characteristics, rather than at rural areas where the culture and cultural environment have not progressed.

Internships and industrial training are the most important connections between educational bodies and the tourism industry. It is actually an integral part of the recruitment and renumeration process after graduation (Busby, 2003). Internship is a stage where vocational aspirations are achieved based on the theoretical knowledge acquired during higher education. Industrial, on the job training and internship should be provided on a compulsory basis and academic credit should be given to internship and it should be a paid job. Although internship and joint industrial training in cooperation with the industry members set up a bridge from the classroom to the workplace (Collins, 2002), and it is the real business environment, the intern students are treated as a cheap labor source whose work is not credited or paid (Okumuş and Yağcı, 2005). Hence, students who experience unfavorable working conditions during internship, do not choose tourism as a field of professional employment. On the other hand, internship, the first step to renumeration and employment, is viewed as a burden by the students.

There are other basic issues to be addressed regarding tourism education. Foreign language learning opportunities for the students are limited. Academics are not fully capable of being fluent in a foreign language. This leads to limited use of foreign publications and journals in education. Although tourism is an area of study with emphasis on vocation and it is an applied science, teaching staff does not have tourism industry experience. Teaching staff only has loose links with the overall tourism industry and its sub-sectors. On the job training facilities and opportunities are limited within the premises of the education institutions. The use of new technologies in education is a very slow process. Such as the use of tourism information systems, global distribution systems and computerized reservation system use, internet marketing, e-commerce etc.,

Conclusions

Linkages should be established with the firms and professionals in the tourism industry. Collaboration with the tourism industry should be achieved and enhanced. This requires lecturers with industry experience. Academics should refresh themselves also through their links with the tourism industry and should willingly be giving advisory services. A crossover between the role of an academic and a practitioner can only be achieved if two parties cooperate on research and knowledge sharing and dissemination of information. Such a cooperation would create a synergy for both parties. Vocational and theoretical degree education should be separated from each other. The curricula of the tourism schools should take into account the needs of the tourism industry. Specialist training should be made available by the education institutions. Tourism education should be more specialist in nature (Dale and Robinson, 2001). Recent developments should be incorporated into the curricula, like internet marketing, reservation systems, online booking media, e-commerce, use of tourism information systems etc. The tourism industry is one of the most important users of information technology. Tour operators use information technology efficiently in planning, marketing, distribution, sales of tourist products, decision making and other support systems etc. A few specialization topics are airline and airport management, use of information technology systems, operational procedures of the industry, marketing of destinations and tourist products, the cruise industry, conventions, incentive travel etc. The means of teaching and methods should be in line with the developments and expectations of the tourism industry. Policy guidelines focusing on tourism education should be prepared and implemented.

VI Tour Operating Business

Tour operator is the travel firm that assembles various travel services, from ground services to international transportation in order to create an organized tour or an inclusive holiday to sell with a profit margin. The tour operator produces and sells tours via its own retail travel agencies under its brand name, via independent travel agencies or through other distribution channels, such as electronic media. Tourists may buy each component of a holiday: transportation, accommodation and other ancillary services and activities separately. The tour operator, that purchases, reserves separate components of a holiday product in bulk, and creates from these components an organized tour is an effective producer of a new product. The tour operator has the ability to organize and supply tours, that of which after being composed of various parts of a holiday is a new entity. The tour operator has the power to sell inclusive tours and holidays directly and indirectly to potential tourists (Goodall and Bergsma, 1991:91).

After taking into consideration the political and economic stability of a country and deciding on prospective destinations and tourist products, The tour operator makes agreements with service suppliers to buy components of a holiday at volume discounts. The tour operator block purchases services and realizes reservations in bulk. In return it receives reduced rates, discounts and free services from principal suppliers. The tour operator prearranges organized tours, creates inclusive holidays according to an expected future demand. Presumed demand and expected sales depend on the past and projected occupancy rates. As the tour operator buys supplier services ahead of time, it has stocks before the demand arises. The tour operator may own airlines, lodging establishments, local tour operators and other travel related companies, both at the origin and receiving countries, that take place as a constituent of the product in the value chain. A few international tour operators are multinational tourism corporations that own subsidiary companies such as resort hotels, holiday villages, leisure airlines, travel agencies, inbound tour operators and other ancillary services. The tour operator bulk purchases from hotels and airlines, makes block reservations at service suppliers with a release date, determines cancellation deadlines and partially prepays service costs, hotel rates and airline fares. By using an advance payment system, the tour operator has risks since it may encounter bottlenecks to fill and use the full capacity it bought during actual sales. The future purchase is a cheaper deal than reservation in an advance system because the tour operator incurs the risk of sales of the capacity bought. At block reservation tour operator’s risks are at a minimum with a protective release date and deadline clause in case of cancellation. The release and deadline date are used by the tour operator as a tool to exert power particularly on hotels, resort hotels and holiday villages. The tour operating business is a complicated and competitive business. The tour operator works according to an expected demand and undertakes risks in tour organization, marketing and sales. If a tour operator is not able to sell enough pre-organized tours, it incurs losses. There are many elements of an organized tour that necessitate matching tourist demand with the supply that is at the discredit of the tour operator. The tour operator creates new tourist demand and directs it to locations where it can match the demand with the supply it secures.

The tour operator horizontally integrates with other operators aiming to capture more of the market share and increase sales. The tour operator vertically integrates with travel agencies and other tourism and travel related service suppliers. An international tour operator is usually an integral part of a conglomerate that provides ease to set up partnerships and joint ventures at destinations where it promotes, markets and sells tours. “A conglomerate is an organization whose interests extend further than a single industry” (Holloway, 1987:87). The tour operator has vested interests in holiday villages, resort hotels and ground operators at different destination countries. It affects a country’s tourism investments and the tourist product types offered to international markets. If the market for leisure holidays saturates, the tour operator enters niche markets and operates faith, Biblical, heritage tours and other specialist products. The tour operator provides a quality service with competitive prices through high volume of services, block bookings, discounted rates from hotels and low fares from airlines. It sells high volumes of organized tours and inclusive holidays with its operation efficiency and financial ability to promote, advertise, market and sell varied tourist products. When a country is to be nominated as a coastal tourism destination, tour operators, resort hotel and holiday village chains and leisure airlines cooperate jointly to produce, promote and market quality tourist products that appeal to the beach tourist. Through joint cooperation and high investments, the tour operator reaches economies of scale with an ability to create additional demand, shift tourist flows and substitute tourism destinations (Ioannides, 1998:140-142; Britton, 1991:457-458), as well as tourist products. The tour operator also substitutes destination facilities, components of tours and the contents of beach holidays. Substituting and shifting the sources or packaged tour components from one supplier to another is realized for a number of reasons. The primary reason is the domination power of tour operators in the packaged tourism market. The tour operator exerts power on domestic service suppliers and facilities in order to lower production costs. Tourists may be shifted between destinations for political and economic reasons and conditions in relation to destinations. Substitution minimizes the risks for the tour operator through exerting power on local firms, which leads to dependency of domestic tourism entrepreneurs (Bastakis et al., 2004:159). The tour operator changes the local handling agency from one supplier to another, from one inbound tour operator to the other (Britton, 1991:457-458). This is also the case in cruise-line operations, where shore excursion agents at ports of call are substituted in changing intervals playing agents against each other to receive low handling fees, low shore excursion rates and also to increase the cruise-line revenues by commissions received from shopping activities at the ports.

The holiday tour operator channels the demand to coastal tourist enclaves, holiday villages and resort hotels it has vested interests in, such as investments and facilities owned, let it be a resort hotel, a holiday village or a joint venture ground operator. The investment could be physical as in owning and operating a holiday village, resort hotel or organizational investment like owning an inbound tour operator as an integral part of a tour operating business. Through an integrated supply chain, the tour operator exerts pressure on principal supplier destination companies. When the tastes of clients change, environmental conditions degenerate, political conflicts or economic problems arise, tourists are shifted to alternative regions or localities. Since the tour operator sells identikit standard tours and inclusive holidays almost with the same components at different destinations within the same destination and at different tourist receiving destination countries, it is able to substitute the holiday package even at the very last moment before the tour starts. The degree of power exerted on the service supplier changes with the type of the product sold, with the type of tourism and facilities developed and in line with the tourism policy in effect at the destination. The degree of power diminishes if the destination's tourist products are diversified. Other factors that decrease the power of the tour operator is the diversity of foreign tourist markets, variety of tourist origin countries, and range and portfolio of tour operators the destination partners cooperate with. The more the number of tourist origin countries and the more the tourist products are diversified, the higher is the ability of destination companies to negotiate cooperation conditions favorably.

The tour operator promotes, markets and sells holiday types and organized group tours with emphasis on local facilities and product quality. The lack of diversified tourist products can result in substitution by an alternative destination that offers the same type of holidays with similar resources and facilities. Resources are primarily natural resources (i.e., sun, sea and sand) and facilities are recreation-based resort hotels and holiday villages, as well as on site leisure and entertainment opportunities. The destination image created by the tour operator is crucial for the final holiday choice of the tourist. During the process of choosing a destination, the tourist takes into consideration the destination and available packaged tourist product images. Favorable images are created in order to shape and comply with tourists' expectations for an enjoyable holiday experience. In organized tourism, the tourist evaluates and compares alternative destinations, types, quality and prices of competitive packaged products before finalizing the choice and purchase.

The reason for tour operators to include a wide range of organized holidays in their sales portfolio is to decrease per unit investment costs and minimize risks. The tour operator influences the tourist's destination and product choice by offering alternative tourist products. The tourist's choice of a holiday is limited to the availability and scope of similar, in most cases identikit destinations and packaged tours that the tour operator includes in its brochure, catalogue, website and other distribution channels. No matter how diversified the direct or indirect distribution channel is, the potential tourist is bound to choose the product that the tour operator has financial interests in. Brochures and catalogues with their visual content are still important sales media that provide detailed information on organized tours and holidays sold. These media emphasize the quality of the product or package tour, its contents, and the available facilities and services. Favorable destination and tourist product images are created by the help of printed and electronic media. A brochure or a catalogue, printed or online, provides information on the duration of the holiday, tour specifications, accommodation facilities, leisure and recreation opportunities, transportation modes, side trips, optional tours and other ground services. Standard holiday products portrayed emphasize primarily lodging facilities and leisure activities. The favorable images conveyed to the potential tourist provides the tour operator the power for demand manipulation.

An international holiday tour operator is usually a part of an integrated conglomerate company. The tour operator forms partnerships and joint ventures at the destination it promotes tourism demand and sells tours for. Mostly, a holiday tour operator has interests in holiday villages, resort hotels and local tour operators. The holiday tour operator also works in the niche markets aiming to penetrate to the domestic tourism industry and widen its scope of activities via marginal investments. The means to enlarge the market in the niche segment is to set up a partnership with an inbound tour operator experienced in specific markets and product types or to set up and own a local tour operator. Concurrently, a foreign tour operator becomes influential in most of the market segments. Such investments of the tour operator lead to the dependency of the domestic tourism companies on tour operators, exemplified with the dependence of destinations. Then, the local operator only performs transfer services as a handling agent and conducts optional sightseeing tours as a representative of an international tour operator. Moreover, the use of accommodation capacity is at the mercy of the tour operator since resort hotels and holiday villages are managed by lodging companies owned by the foreign tour operator. The profit margins are quite low in the competitive beach holiday market. The tour operator might own the service suppliers in the production chain or be a part of a conglomerate company in order to perform its business efficiently at low costs. The international holiday tour operator usually owns leisure airlines, hotel investments and management companies. The tour operator also establishes a retail network of travel agencies to distribute products more efficiently without paying commissions to third parties. In the integrated tourism structure, the tour operator also owns other tour operators, cruise lines, inbound tour operators, marketing media, and reservation and distribution channels (Dunning and McQueen, 1982a). Although the main reasons of integration are to decrease costs and distribute risks, tour operating is still a very competitive business. Capital need is high because of advance payments to airlines and accommodation establishments. Integration investments and supply chain management necessitate a high capital. Sale of tours depends on high promotion, marketing and distribution channel expenses. On the other hand, profit margins are quite low and there is a cash flow problem due to lag time between product formation, actual sales and receipt of clients' payments. One of the problems that creates cash flow bottlenecks is the seasonality of tourism, a topic very difficult to tackle.

Destination and Tourist Product Competition

In the international tourism market, countries compete with each other via their tourism destination images. In coastal beach tourism, where holidays are identikit at the same destination and at other destination countries, the images of tourist products are influential in competition. If a tour operator does not include a destination and its products in its sales portfolio, the destination does not feature in the distribution channels. Thus, it effectively does not exist in the market and a tourist cannot reach the destination and its products through organized tourism. If a destination is included in the distribution and sales networks, the potential tourists can, in accordance with their travel motivations and depending on the diversity of products available, choose a cultural tour, a Biblical tour, an organized niche product or sojourn beach holiday at that destination. The tour operator creates favorable destination and tourist product images for efficiency in sales. The tour operator interprets the demand, creates induced destination images through media, distribution channels, internet websites, catalogues, brochures and other media to direct potential clients to the products of the company. Specialist, niche tour operators create a country and destination image with emphasis on culture, history, man-made and social resources and attractions, followed by images of a cultural, faith, Biblical tour, archaeology, art study tour and similar inclusive tours because they sell unique and differentiated products.

Cognitive, perceived distance has an influence on a holiday place choice. A person might not have adequate and correct information or knowledge about a country and as well might have prejudices against it. Due to lack of knowledge and as an outcome of real risks and / or due to psychological factors, the cognitive distance between the tourist's residence and destination country may be perceived as very far. In coastal beach tourism, physical distance between the tourist origin and destination is important because when travel distance increases, the cost of the holiday increases too. According to center periphery hypothesis, destinations nearer to origin countries receive more inbound tourists and secure a bigger international tourism market share. In this process, the brand name of the tour operator is influential on the destination choice of the potential tourist (Laws, 2000:94-95) and it is more so in the standardized beach holiday market segment.

A main function of the tour operator is to overcome perception problems and distortions about a destination. Both national tourist offices and specialist tour operators create an awareness about the country and aim to convey a favorable destination image in cultural and niche tourism. Destination images created by public bodies might coincide with those created by specialist niche tour operators but not necessarily with those created by holiday tour operators. In some cases, the image created for a destination by the tourism industry may be different than the realities of the country. Initially, an awareness about the country is necessary to convey a favorable destination image. This is more true for cultural and niche tourism than mass tourism. The two main types of organized products sold in the international tourism sector, in line with the motivations and aims of the clients, are cultural or niche tours and beach holidays. In cultural, urban and niche tourism markets, the image emphasis is on the destination. In the coastal beach market, the holiday destination is irrelevant to the sun-seeking tourist. Hence, image emphasis is on destination facilities, holiday villages, leisure and recreation and other facilities. In both cases catalogues, brochures, internet websites and electronic distribution systems convey the images created by the industry, particularly the inclusive tour industry.

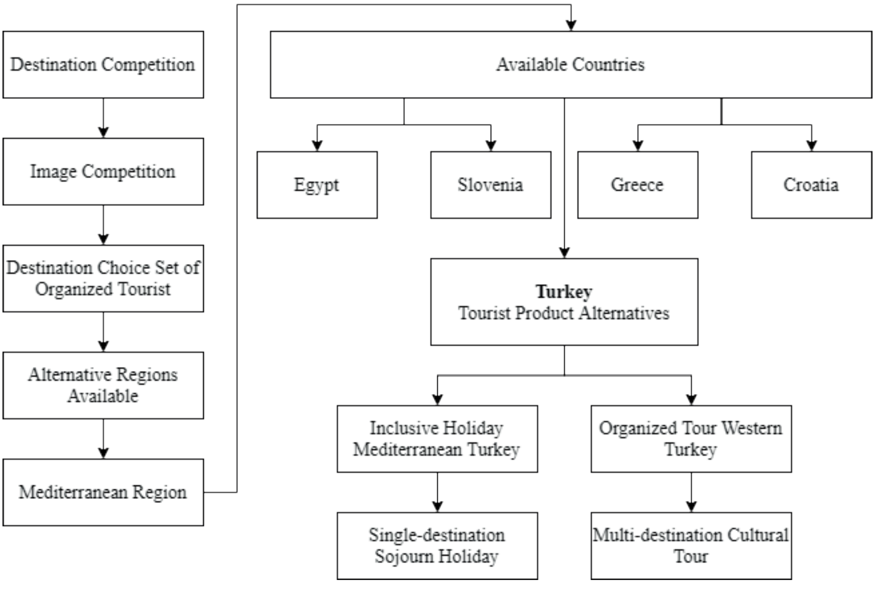


Figure 2. Destinations and Tourist Product Competition

In the travel industry, travel agencies, tour operators, tourist product brokers and electronic distribution networks disseminate the related travel and tourism information. These media influence tourists' demand, tourists' destination decisions and the holiday product selection process. Distribution channels possess marketing research power to promote destinations and influence destinations and their product images. The tour operator plans a tour or holiday, organizes the necessary inputs, and produces a new product that is a different entity than its constituents. The tour operator controls the contents and quality of organized travel and tourism services, the suppliers from the local tour operator to accommodation units, local transportation modes, professional tour guides and other ancillary services such as shopping, provided at the destination.

Figure 3. Tour Production Sequence

The tour operator prepares a multi-destination packaged tour or an inclusive sojourn holiday or both, depending on its company policy. The holiday tour operator makes organizational investments, secures seats from airlines and beds from accommodation units to produce a cheap beach holiday. The negotiation power of a tour operator provides the company the ability to receive reduced bulk rates from accommodation establishments, resort hotels, holiday villages and low fares from airlines. Thus, potential tourists, who otherwise would not be able to have a holiday, are able to take a holiday suitable for their budgets. Induced product images direct the clients to buy organized tours or packaged holidays offered with an acceptable quality and affordable price. As the sales increase, the tour operator produces more of the identikit product for the same destination, region, locality and site. When production volume increases, per unit cost of standard holiday decreases. The process is an assembly line production with more components embodied into the product. In return, sales increase for the same product types and destinations, accruing higher revenues and profits to the tour operator. Subsequently, the tour operator invests more, and starts working with more hotels, holiday villages and airlines. Actually, high organizational investment costs are incurred by the tour operator even if it does not own the accommodation premises and air transportation modes. The tour operator, receiving advice from and cooperating with the inbound local operator, enlarges the scope of its activities at several destinations. Its market share increases by selling varied but un-differentiated new tour products. During the next phase, it penetrates to cultural and niche tourism markets where profit margins are higher due to the specialized nature of unique tour products. This phase necessitates the cooperation of the tour operator with the local tour operator as a partner because there is a need for expertise to provide ground services of niche products such as cultural, faith, Biblical tours, urban city vacations etc. Subsequently, the scope of the tour operating business entails quite different economic activities with which the tour operator maintains oligopolistic power and conditions that are endorsed on domestic companies, accommodation establishments, local tour operators and other support services. Economies of scale both in tourism infrastructure and superstructure investments can be explained in this respect. High-cost accommodation investments concentrate with a ribbon development at certain seaside enclaves where sizeable holiday villages and resort hotels are either next to or adjacent to each other (Erkuş-Öztürk, 2010:115-116). High scale physical investments are necessary to decrease management, staff and per room cost in the accommodation sector. Under such conditions, accommodation is concentrated region-wise so that holiday organizations can be efficiently managed and performed. Since enclaved tourists are in a captive environmental bubble and segregated from the outside world, their holiday behavior and consumption are kept under control. The outlined policies enable holiday tour operators to develop new tourism localities or sites at the same destination countries by continuously enlarging their markets and selling the same product like a different entity at different destination countries.

Tour Operator's Destination Nomination

When a destination is to be introduced by tour operators to the international tourism markets, one of the prime concerns is the existence of an adequate supply of high-quality hotels, holiday villages and other tourism facilities such as local transport facilities, restaurants, recreation areas, leisure activities etc., at the destination. An international hotel chain's existence is a sign of quality, brand name and a favorable image. A country is chosen as a destination if it is politically stable and has sustainable economic conditions. When a country is nominated as a tourism destination by the tourism industry, particularly by the travel trade, tour operators, airlines and international hotel chains jointly cooperate bringing their efforts together.

There are certain criteria a tour operator takes into consideration when entering a new market and choosing a country as a tourism destination. First of all, accessibility to the destination is an important factor. International flight connections, high-quality air transportation, seat capacity and suitable airfares affect the tour operator's decision in favor of the destination. Existence of domestic airline links, local transportation modes such as land, coach etc., as well as sea ports for the cruise market is taken into account. Adequate high-quality accommodation capacity at the destination to match with airline seat capacity enables the tour operator to plan its tour organization. In organizing resort holidays, the tour operator seeks for a minimum quantity and quality accommodation capacity, at a region, locality or site. In the coastal mass market, several accommodation units with adequate bed supply that the tour operators would use should be reachable at sea side enclaves. As well, restaurants serving local and international cuisine, entertainment opportunities, museums and sightseeing attractions are the other ancillary determinants for the destination choice. Support services, talented guides, diverse and rich recreation and leisure facilities increase the destination's attractiviness. Quality of general and urban infrastructure in the country and tourism-specific infrastructure at different regions, either coastal or rural, are key elements taken into account when including a destination in international tourism markets. Developed physical infrastructure, roads, airports, sea ports, marinas and yacht harbors, sewage systems, electricity as well as social infrastructure, historic, heritage sites, man-made attractions, rich social and cultural life, a lively city atmosphere, clean seas and beaches, favorable climate conditions and similar peculiarities are taken into consideration and evaluated by the travel trade. As noted earlier, a country's political and economic sustainability are considered and evaluated seriously during the nomination process. In case the above specifications do not satisfy the tourist's expectations and if they are not acceptable by tour operators either by the quality standard or price levels, the destination is not included in distribution and sales channels; however, the rich country's resources are.

At prospective coastal destinations, if general infrastructure is not adequate for the development of mass-tourism then regionally specific tourism infrastructure must be created. Once the specific infrastructure is created then superstructure investments, such as accommodation facilities, leisure, recreation and sightseeing tour opportunities should be built. A certain and minimum quantity of physical supplies at high standards and quality lodging units should exist, otherwise inclusive holidays at volume will not be organized to a region. During the process of preparing an organized tour or holiday for a destination, a few special types of trips are organized for foreign tour operator's managerial people and travel agency sales personnel. Firstly, information, or info trips, are organized prior to planning and organization for the authorities of the tour operator. Secondly, familiarization, or fam trips, are organized after the production of tours to acquaint the sales personnel of foreign travel firms and agencies. Finally, inspection trips are conducted prior to and after the operations for the tour operator management staff in order to evaluate and assess the quality of land services. Inspection trips are also organized for the decision maker in the incentive and meetings markets.

The holiday tour operator channels tourists to resort enclaves and hotels they have interests in. The tour operator may have physical investments at the destination such as owning or managing a holiday village or an inbound tour operator. Through a vertically integrated supply chain, the tour operator controls all phases of a client's consumption to increase its revenue. The diversity of tourist origin countries affects the power relationships between the tour operator and destination companies. The higher the number of tourist origin countries and the more diverse the number of tour operators that hotels, airlines etc., cooperate with, the lower the dependence of the destination on foreign companies and origin countries. A tourist receiving country's economic development level and degree of dependency are related to each other; the higher the development level, the lower the dependency.

Tour Operator's Policies at Destinations

The holiday tour operator that has investments in lodging facilities and local tour operators, works in a monopolistic market, affecting the destination, domestic tourism companies and destination's tourist products by different policies and monopoly power through endorsed domestic companies and entrepreneurs. The tour operator affects destinations and exerts pressure in a number of ways, primarily with the power of creating and channeling tourism demand at the earlier stage of the product holiday decision-making process, product choice and buying behavior. The holiday tour operator either includes a destination in the brochure, catalogue, and electronic distribution channels or not, diverts or channels the demand to destinations of its preference, dictates the destination's holiday product type, as well as dictates the client to buy certain types of tours or holidays. The service quality standards are enforced to the hoteliers, and accommodation cost is reduced by negotiation and bargaining power. The tour operator forces hotels to provide higher quality services for the same negotiated rate over contract, and renegotiates for lower rates after agreements are signed. In doing so, pressure is exerted by threatening accommodation units to shift the demand. The tour operator also controls prices, rates, and contents of its organized standard products by playing with their inputs and components. In order to command quality of product components and to nominate the prices and rates of main ground services, it exerts power on local tour operators. Also, it exerts pressure on the other destination companies by substituting the principal suppliers and diverting the clients to alternative regions and buying cheaper services from other land operators by which tourists are affected.

The tour operator uses late release and dead line dates in the agreements as a means to exert its power. By applying a short release period that does not allow adequate time for selling unused rooms and other ground services, it puts pressure on accommodation facilities. Finally, it forces hoteliers to further reduce rates after the contracts are signed (Buhalis, 2000:115, adapted and modified.). Using exclusivity right clauses in the contracts to eliminate competitors from hotel premises is another way of limiting the chances of the hotelier to sell its unused capacity. Exclusivity right is "…the right of tour operators to exclusively represent hotels in their markets" (Buhalis, 2000:118). Consequently, a particular tour operator that generates most of the sales volume for an accommodation establishment determines which other tour operators and distribution channels can sell the hotel's unused beds and bans the hotelier from selling the unused capacity to competitors in the same market. The tour operator forces the hotelier to include more components in the package to decrease the cost of inputs while increasing the content of the organized vacation. Hoteliers are forced to provide higher quality services for the same contracted rate. The outlined methods and other similar measures decrease the revenues of hotels and other local service suppliers and also diminishes the contribution of tourism to the overall economy. As a consequence of such policies, land service suppliers are at the mercy of tour operators. Land operators that cooperate with foreign companies are forced to act as agents for arrival and departure transfers. The transfer agent's role at most is to organize optional tours as an extra excursion, sightseeing entity sold by a tour operator's representative, who is in most cases an employee of the same citizenship as the tourists. Other techniques applied by tour operators to reduce hotel and land service rates are the timing of negotiating contracts, bargaining during low occupancy periods, misquoting customer satisfaction surveys and emphasizing low level client satisfaction reports, directing or misleading tourists to certain hotel premises by using the same or similar category property clauses and playing hotels against each other. Oligopsony conditions with a few buyers against multiple principal suppliers and fixing rates in between a few tour operators are other policies. Over contracting and renegotiating rates and fares after low contract coverage, altering or creating misleading images for destinations and properties, delaying payments to principal land service suppliers are a few of the other methods. The tour operator also promotes and substitutes alternative destinations, and substitutes hotels and ground operators in changing intervals (Buhalis, 2000:125-134, adapted and modified). While implementing such policies, the tour operator uses its market information and knowledge of sales advantage to achieve its goals. It does not disclose information that might benefit the hoteliers and ground operators. The tour operator consequently realizes the final allocations and bookings at the very last minute, quite long after negotiations with hotels and other ground service suppliers are finalized.

In coastal tourism, standard inclusive holidays are made available and sold at a number of destinations, countries, and destinations. Hence, the dominant feature of the market is price rather than product competition (Ascher, 1985:62). An identikit organized holiday is not specific to a particular country or region, which is contrary to cultural and niche tours. The holiday tour operator's product portfolio includes a number of beach destinations with a wide range of alternatives, although they are all identical products. Thus, the tour operator secures the profits it aims to earn while protecting itself from investment and operational risks.

By nature, for a developing country, tourism is an imported industry from the western world (Britton, 1991:451). Tourism in developing countries is shaped and developed in line with the policies of international tourism companies and foreign holidaymakers' expectations. In a developing country, since there is not enough domestic demand, the necessary inbound demand is foreign or external, and the destination's tourism supply is at the mercy of foreign tourism companies. Therefore, to be able to manage their facilities and sell tour products and services, national companies cooperate and integrate with international tourism companies. The power discrepancy between the counterparts creates dependency of domestic companies on foreign ones. The degree of dependence is more in coastal beach tourism where identikit tourist products dominate. In mass tourism, domestic companies and entrepreneurs can only deal with a few economic activities. In culture-based niche tourism, where specialist inbound local operators are instrumental in supplying diverse and unique products, the level of dependency is less. The effect of inbound international tourism on the destination economy and revenues generated change with the type of tourism that a destination caters for. Whether the destination country caters for sun-lust mass market or culture-based wanderlust niche tourism is of utmost importance and specifies the structure of the national tourism industry. The tourism type specifies the economic benefits that accrue to the destination. Since the mass market is dominated by international tourism conglomerates, there are leakages from the economy that are transferred to inbound tourist generating countries. The tourism type specifies and affects revenues and economic benefits, and shapes the local tourism industry structure and also the social and cultural fabric of the host society. In this context coastal mass tourism and niche tourism differ from each other in many respects and they have quite different repercussions. The type of tourism developed in a country is closely related to the public policy in effect. National tourist offices in developing countries set up and implement policies for the development of tourism. The national tourist office does not sell tourist products, but it is responsible for promoting a country as a tourism destination. The role of the national tourist office in creating a favorable country image is crucial. National tourist offices create an awareness about the country as a holiday destination, whereas tour operators create destination and product images targeted towards selling their tours to potential tourists. Tourists choose destinations and purchase holidays without seeing the destination and its products. Potential tourists receive information from friends, mass media, travel intermediaries, internet sources and electronic media. The travel industry stimulates clients' travel motivations by advertising and information provisioning activities. The tour operator creates dream images in line with their sales policies. National tourist offices create destination and country images, whereas the tour operator creates and conveys tourist product images. The tour operator's dream holiday images, which tourists search for, may conflict the images created by public bodies. The national tourist office may emphasize historical, cultural and man-made resources and attractions of the country. On the contrary, the travel industry may emphasize natural resources, a coastal holiday and beach facilities.

Marketing, promotion and advertising activities of competitive destinations to a certain extent specify the market share of each destination, particularly if the tourist products are homogeneous, identikit and standardized. Packaging of travel or packaging tourists means that the tour operator is the medium for potential tourists to choose a tour or a resort holiday. The tour operator packages tourists and standardizes their consumption with organized holidays or tours. Not only the tours and holidays are packaged, but also the tourists. In coastal mass tourism, holidaymakers are transferred from the airport to the hotel, they are taken from the hotel to an optional daily sightseeing tour and by the end of their holiday are transferred to the airport for their return flight. Thus, holidaymaking turns out to be a consumption process whereby the travel industry processes tourists. The highly industrialized travel processes standard products and those who consume them. Packaging tourists also means that the client buys a range of products that are produced and interpreted by the tour operator. During this process, the travel industry is the coordinator of tourists' demand. Most tourists might not have knowledge about holiday opportunities and rely upon tour operators, retail travel agencies and distribution channels. They buy holidays from a range of products offered by the travel industry. There are identikit products in tour operator's sales portfolio for many locations, no matter how many destinations are marketed. Destinations heavily depend on the organization, marketing and sale efforts of the travel and tourism industry. This is very much so for a developing country destination. For a developing country, tourism demand is external as there is very little domestic tourism demand. Hotels, holiday villages and local tour operators depend on foreign companies to sell their capacity and services. Domestic entrepreneurs do not have the power and ability to bargain effectively with international conglomerates, chain hotels, and integrated tour operators. Tour operators behave in oligopolistic conditions and exert power on land service suppliers. Local hotels and local tour operators do not have the power to negotiate with international tourism companies in terms that are in favor of their interests. Cheap, standard tours or beach holidays with low profit margins dominate the market in the coastal tourism and also culture tourism markets. In the culture tourism market, there is also mass production of multi-destination organized tours in a few tourist origin countries due to fierce competition among the tour operators and local tour operators. Price, rate, and fare are the only competition tools among destinations, tour operators and tourist service suppliers. From the standpoint of tourists, the price is the main determinant to choosing an organized tour or resort holiday. In international markets, product prices are the most important determinant in competition between identikit destinations that are at the same distance from the tourist demand creating countries. Tour operators aim to maximize their sales volume, overall profitability and enlarge their market share through high sales of cheap organized standard tourist products.

VII Information and Communication Technologies in Tour Operation

Like many other organizations in the tourism industry the survival of tour operators depends very much on their adaptation to changes in traveler needs and preferences. One such continuous change happens in ICT, Information Communication Technologies. The importance of ICT in tourism is undisputed. Most ICT creates various advantages for the travel trade. For example, IT has created speed and efficiency, increased the geographical scope of travel agencies, and reduced costs. Big Data and AI technology also offer potential benefits and improved decision making for tour operators (Yoga, Korry and Yulianti, 2019). Fuza et al. (2012) discussed ICT stating it enables travel organizations to (i) adopt to the latest trends and new products, (ii) reach potential customers worldwide, (iii) build complex itineraries, pricing and operations, (iv) reduce costs through automation and (v) increase accuracy.

Yet some of the development of ICTs also created major challenges that reshaped the tour operating business particularly travel agencies as members of the tourism distribution system. Developments in technology have created major transformations in travel trade. For example, the rise in the number of OTAs, search engines, review sites and hotel websites offer alternative mediums that also provide tour operator services. Despite these developments and alternatives and the enlarged volume of the travel trade market overall, these benefits were only harnessed by a few large companies and the total number of travel agencies declined rapidly (Fuza, 2019).

Different to other intermediaries who display physical products, travel agencies and tour operators sell information and expertise. Hence the availability, quality and reliability of information becomes critical (Bennett, 1992). Yet the transformation of ICT also resulted in the mechanism of providing information being as important as the information itself. Less people travel to meet with tour operator specialists; they would rather obtain information online, which diminishes the need for brick and mortar commercial travel agent spaces and increases the importance of digital mediums and social media.

ICT has also made travel agencies' ability to offer a wider range of products possible, creating interfaces where tour operators develop and sell collective products and services. Ssewanyana and Busler (2007) also conclude that ICT has helped introduce "Network Economies, where successful businesses are linked with their suppliers, internal operational processes, channel members and customers in real time." Buhalis (1998) also discusses that utilizing ICT in tourism continuously increases speed, reduces costs, and improves reliability, compatibility and connectivity of systems, organizations and people. For example, different components of a tour are now able to be created, reserved, priced and sold by different tour operators collaborating and creating synergies using the software and technology available (Buhalis, 1998). Technology has also resulted in more efficient and effective operations, with use of location based services and RFID, and other software. Tour operators adopting ICT are able to coordinate their operations more quickly, with cheaper, better and error free transactions.

History of ICT in Tour Operators

Besides the generic developments in computing technology, computer reservation systems introduced by American Airlines in the 1970s, which later transformed into Global Distribution Systems (GDS) in the 1980s, represent the first major technological transformation in the travel trade (Buhalis and Froerste, 2014). Enhanced telecommunications, phone, telex and text services also affected how tour operators conducted business during the 1980s. Since then, enlarged internet usage from the 1990s and developments in e-commerce in the 2000s, travel agencies are facing various technological transformations which have created not only various efficiencies in operations but also have challenges in distribution which have also resulted in disintermediation (Law et al., 2018). The rise in use of mobile devices, social networks and social media has also created reintermediation in the case of metamediaries, where large OTAs continue to increase their market share at the expense of traditional travel agencies.

Impacts of ICT in tour operation

Technology has also restructured the power asymmetry in the tour operating business and their roles as intermediaries. Advances in technology has created major competitive advantages for a small portion of travel agencies and turned them into conglomerates while a majority of business which could not adopt and catch-up with the speed of technology faced serious challenges and went out of business. The impacts of technology on the travel trade might be classified under positive and negative impacts.

Table 6. Pros and Cons of Technology on Travel Trade

Positive	**Negative**
Tasks performed more effective	Disintermediation
Reduces costs	Commercialization
Transaction Speed	Technical problems
Information accuracy	High initial investment
Product width	Training needs

Thanks to ICT, various information is retrieved, processed and converted into usable outputs in an efficient and effective way. For example, manual processing of an overseas flight might include hundreds of different fares, only one of which offers the best value for the customer. Computer software is now able to find the most suitable flight almost instantly. Without ICT it is very challenging and time consuming to identify that specific flight. Hence ICT not only results in a cost-effective operation but also offers improved efficiency in business processes (Fuza, 2019), resulting in productivity, profitability and growth (Fuza, 2019). Information and communication technologies also prevent most of the errors of manual processing (e.g.,, calculations). Finally, ICT is able to enhance product width offered by Tour Operators and makes various products offered by different suppliers through seamless interfaces.

Despite its positive impacts, ICT have been detrimental for travel trade. Particularly, travel agencies that were unable to adopt to the developments in ICT have suffered large business losses and a majority have gone out of business. Consumers started to use online channels rather than physically visiting travel agencies for travel advice and bookings. Travel agencies have been facing pressures as a result of digitalization in the market. Recent research in the UK found that only 16% of Brits prefer to book face to face with a travel agent. The American Society of Travel Agents also report a significant decline in the number of *brick and mortar travel agents* from 37,000 in 1995 to 18,000 (Fuza et al., 2015).

Another reason that promotes disintermediation is that the millennials are more prone to use technology and online channels. Based on statistics, 74% of all travelers use online channels not only to plan their trip but also receive travelling advice. The increase in number of online channels has also resulted in a commercialization process and travel products have become available for everyone regardless of geographical boundaries. Hence, travel products have started to become commodities and standardization and internationalization has gone to extremes. Most of these ICT systems now disregard the differences in products, for example, a four-star hotel room is considered the same across suppliers with basic standard descriptions. ICT also requires a large amount of initial investment, needs technical knowledge and expertise, and hence improved training needs for the travel agency staff. Nevertheless, considering the Online Travel Agencies (OTAs) volume, the travel trade is still an important part of the tourism industry.

Online Travel Agencies

Today, 63% of the World's population uses the internet. This represents a 5% increase from 2014 (Internet World Stats, 2021). This transformation, particularly on the penetration of the internet, also created a new leisure class where 74% of travelers use the internet to make their travel plans. New organizations and business models such as travel agencies and tour operators catering to these smart tourists have also emerged, solely working online. The growth of OTAs stems from several factors. The major reason is the advancements in ICT which initially facilitated all online transactions including direct hotel reservations. However, the major success of OTAs were their ability to overcome brand.com hotel websites by offering a better value for travelers at a single outlet where they can compare alternatives and see and read others' ratings and comments. There are several other advantages OTAs offer for customers which made them popular among travelers.

OTA digital platforms use their market share, algorithms and processing power to dominate markets. They first apply lock-in strategies for customers to make it costly to switch to other platforms. They also offer a wide variety of products and markets and cover the market as much as possible. They also offer individualized algorithmic solutions and use efficient tools to facilitate transactions (Orlowski and Scott, 2015). They use the big data created by their users to refine their algorithms (Dolata, 2019).

Major OTAs operate with the rate parity rule, which refers to the fact that any listed hotel rate is the best rate in the market. OTAs therefore offer the cheapest rate for any hotel listed on their inventory. Major OTAs feature millions of suppliers, discounts and filtering options offering an effective one place shop for different trips. The number of locations, variety of properties, extensive up-to-date content with pictures and loyalty programs (e.g., genius program) also make it more convenient for travelers to book at OTAs. OTAs also offer various customer generated ratings and comments about different suppliers. Other customers who have stayed in these hotels are credible sources of information and reduce the risk associated with purchase of an intangible tourism service. OTAs also offer customer services, mobile applications, maps and travel guides that offer useful functions and tools to enhance trip experience.

OTAs also offer various advantages for their suppliers. First of all, OTAs provide a large pool of potential customers with increasing volume. This global market offers opportunities to reach incremental customers which are not normally available in other channels. Boooking.com offers local web sites operating in different languages, payment options and so on, that would not be feasible for a single hotel to invest in on their direct channels. This offers an additional revenue for hotels when they are listed in OTAs. Applications and software available for hotels also make it very effective to manage inventory and prices in real time. There are usually no fees involved for hotels on OTA reservations, but commissions on real bookings only. There is some research which discusses travelers after searching for alternatives at OTAs, return to brand.com hotel website and reserve directly. This, "billboard effect" is another reason hotels wish to be listed on OTAs. OTAs also share various analytics and market intelligence to suppliers so that hotels make informed decisions. Hotels have started to line up for these benefits which made OTAs reinforce their positions in the market, attract more customers online and become even stronger. Overtime, growing their customer database, OTAs started to cannibalize direct reservations and hotels become more dependent on them, increasing their commissions to be listed more desirable positions on OTA lists.

Today, international OTA markets can be considered as an oligopolistic market, with Expedia and Booking.com as the major players. The lucrative OTA market has also attracting new players including Google and Tripadvisor to invest in OTA business. Priceline group is the largest player in the market operating different brands including booking.com. A list of Priceline brands and their business models are listed below.

Table 7. Online Distribution Channel Business Models

Brand	Business Model
Booking.com	Lodging reservations
Priceline.com	Lodging, flight, car rental and package tour reservations.
Kayak.com	Meta-Search engine, comparing different rates of different OTAs for a specific product
Agoda.com	Lodging reservations (Focused on Asia-Pacific)
Rentalcars.com	Car rental reservations
Open Table	Restaurant reservations

Source: Innovation Tactics (2020).

Information Communication Technologies Used in Travel Trade

Besides using online technologies to reach customers in electronic mediums, travel agencies use various other software and technology as well. The ICT used in the travel trade might be classified under inter- and intra- organizational systems. The inter-organizational ICT are systems that interface with external systems (e.g.,, airlines, hotels) while intra-organizational ICT are systems such as reservation, ticketing and accounting systems (Bennett, 1992). Office software are used for operations, reservations, marketing and accounting, and location-based services, and GPS is also used for transfers, luggage handling and timings. The technology adoption process in travel trade is displayed in Figure 4.

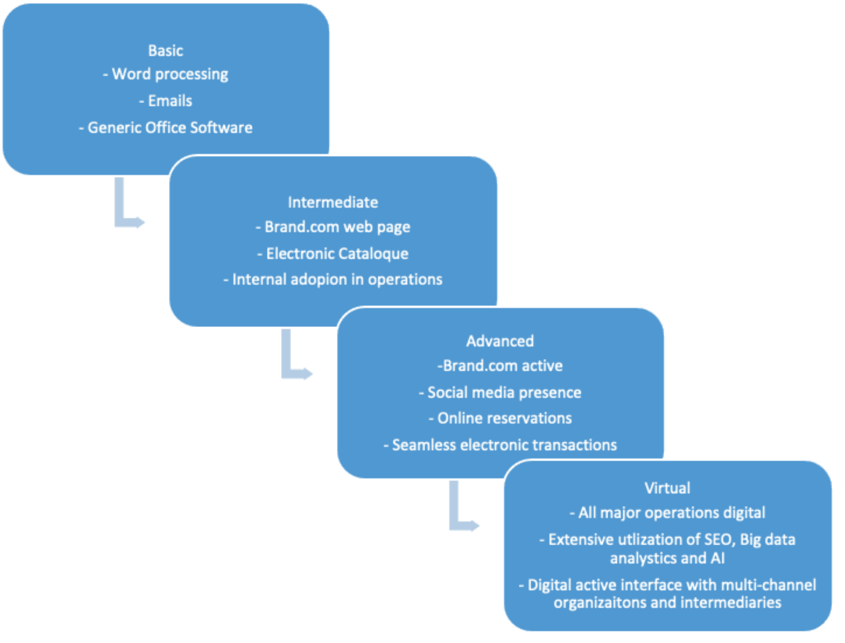


Figure 4. Levels of Technology Adoption in tour operators.
Source: Adopted from Buhalis and Deimezi (2003).

Customer data base, purchase history, and all related "big data and analytics" can also be utilized for enhanced decision making and strategy development. These analytics are increasingly used and converted into recommender and personalization services using artificial intelligence. Fuza (2019) discusses technology adoption in travel agencies in five areas as computer application skills, the internet (websites), e-commerce, social media, and mobile devices. Hence, tour operators' survival in the digital era is very much dependent on these adoption capacities. Ticketless services, do it yourself options and simplified booking procedures have also emerged as additional trends.

Tour Operation Survival amid ICT developments

One of the methods for survival in disintermediation for travel agencies is to invest in technology and offer digital solutions to customers. Yet, competition in the online travel environment is fierce, major OTAs enjoying a large market share use power asymmetry in the market to impose rules and rates that prevent easy access to the market for new entrants. Some of these OTAs are subject to investigation of disturbance of anti-trust laws in various countries including Turkey, Italy, Belgium and France (Srnicek, 2017) claiming these few dominant platforms algorithmically govern markets and dictate market conditions. These oligopolies define and standardize products, impose conditions of exchange (e.g.,, rate parity, last room availability), manipulate evaluation systems and both consumers and suppliers are becoming increasingly dependent on them (Kirchner and Bayer, 2016).

Competing in this oligopolistic market is tough but not impossible. Differentiating products and services, and targeting specific markets with distinct needs have been working for different travel agencies. Regional OTAs (e.g.,, ostrovok.ru), opaque models that hide hotel names (e.g.,, hotwire.com), online travel sites offering roulette hotels (e.g.,, orbitz.com), business models that sell room hours instead of room days (e.g.,, dayuse.com) and last-minute room bookings (e.g.,, laterooms.com) are a few examples.

Another solution is specialization on a specific niche product and market. Tour operators are either producers of products or resellers. The reseller tour operator has been severely affected by the developments in technology, particularly when they sell commoditized products such as airline tickets or hotel rooms that are available in many other mediums. Operating as intermediaries offering 3rd party products such as flight tickets or hotel beds, the reseller tour operators has lost their use. Because these products are becoming standardized, the information provision role of the tour operator is also diminished. With the spread of the internet, customers are now able to reach these suppliers directly. Realizing their power, suppliers have also started to limit the benefits (e.g., decrease commissions) they offer to tour operators. Some suppliers have even omitted travel agency commissions altogether. These suppliers are trying to bypass the middlemen (travel agencies) even offer better conditions for direct reservations claiming best rate guarantees, additional services (e.g., breakfast) and other benefits (e.g., upgrades).

ICT have become a major tool used to create, promote, distribute and satisfy travelers. Hence, the tour operator needs to create some sort of a value to the client and differentiate itself. It can either offer products at a cheaper price, but this is very challenging for simple generic products such as hotel reservations or flight tickets. Particularly, the strength of OTAs and their established position in SME travel organizations are not able to compete in this oligopoly market unless they offer packages that include several products. Hence, the complexity of products offered by the tour operator also affects the survival of the tour operator.

If the organization is selling standard products such as flight tickets, competing with the OTAs might be harder. However, if the tour operator creates packages by using these individual services, and starts selling complex products that require extensive time and expertise to create (e.g., multi-destination package tours) then the tour operator has a competitive advantage that would differentiate itself and create unique value for customers. Another way to survive is to offer real expertise about a specialty product. For example, a nature-based hunting tour would require specialist expertise, and knowledge of a region as well as different permits where a local travel agency becomes indispensable. Offering such products and services and decreasing not only the cost but also reducing time spent to make arrangements and minimizing the risk involved with the travel activity are other ways that travel organizations can deliver superior value.

To conclude, technology has brought important advantages to tour operators. By using various technologies and software, tour operators are now able to operate more efficiently, create different products, effectively collaborate with other organizations and reach a more diverse client base through online channels. Yet, technology has also created major challenges and oligopolies that dominate the market on commercial tourism products such as flight tickets and hotel bookings. However, OTAs, because of their size, are not able to customize their products based on local and niche market needs. Efficient tour operators, even if they are SMEs, aim to satisfy these needs and target specific markets with distinct and complex products that offer efficiencies in cost, time, risk and expertise.

Using their local know-how, expertise and flexibility, these SMEs can still create opportunities and sustained competitive advantages against OTAs while using technologies to better create value and reach their niche traveler markets. There is evidence that suggests specialized travelers search for information on the internet, but shop offline to receive a more personalized and expert service (Buhalis and Law, 2008). Finally, emerging new technologies such as virtual reality, augmented reality, big data and artificial intelligence also offer opportunities for tour operators to better serve their clients. Technology adoption is particularly important for the new genre of smart tourists, the generation Z and Y.

VIII Multinational Tourism Corporations

International tourism organizations offer tourism as the most suitable option and last chance for development to developing countries. International organizations such as the United Nations World Tourism Organization, United Nations Conference on Trade and Development, and World Bank Group (Hawkins and Mann, 2007:349), shape the future of world tourism. Multinational tourism corporations and tourism conglomerates influence and shape the tourism policies of developing countries. In brief, the public tourism policy of a developing country is mainly shaped by international organizations' function in tourism and by multinational tourism corporations. The public policies prepared, developed and implemented in developing countries are in line with the interests of international tourism organizations and foreign tourism companies as if tourism is the last option for economic development and progress. When a tourism policy of a developing country is shaped externally and in line with the interests of foreign international entities, the country attracts international tourism investors. The role played by international bodies in shaping tourism policies is a yardstick for foreign investors to choose the country as a prospective tourism destination. International tourism is used as a means of propaganda for a country. From the standpoint of the destination, apart from the foreign exchange earnings that might be generated, the employment opportunities created conveying a modernity image for the country is aimed for. A new, modern country and destination images are created by tourism specific infrastructure investments, airports, ports, marinas and superstructure investments such hotels, airline operations, shopping malls etc. The existence of western people in the country as holidaymakers is usually perceived as a sign of security, safety, and attractiveness of the country. In the past this is what happened and was observed in the Mediterranean sun destinations Portugal, Spain, Greece, at their initial tourism development phases. It should be noted that in their early stages of tourism, when Portugal, Spain and Greece entered the international tourism market, they were all ruled by fascist military regimes. Coastal mass tourism developed on the Mediterranean and Turkey was introduced following the 12 September 1980 coup d'état during which a new holiday country image was conveyed to international tourism markets. The military regime treated inbound tourism as a means to legitimize its fascist rule through propaganda and convey favorable country and destination images and transform the country to a playground of international tourism corporations and western and European beach holidaymakers, as if Turkey were a country of liberty, happiness etc. Like other developing countries, the country received investment credits and loans from the World Bank Group (Hawkins and Mann, 2007:353-354), for specific tourism infrastructure, hotel, resort hotel and holiday village investments (Inskeep and Kallenberger, 1992:89).

In the action of tourism propaganda, foreign exchange earnings and other economic benefits derived from inbound international tourism are emphasized. Favorable reports regarding growth in international tourism are prepared by international tourism institutions that serve the purposes of the international tourism industry, sub-sectors of the tourism industry, international tourism companies, foreign holidaymakers, and the tourist receiving country and her citizens. International organizations, foreign banks through providing credits and loans and multinational tourism corporations promote tourism in developing countries and encourage the countries to invest in tourism to enlarge their market and widen their product portfolio. Every new destination provides the opportunity for new tourist products. International tour operators function in all market segments and all types of tourist products influence tourism demand, create tourism demand and direct tourists to destinations where they dominate and control tourism supply. As an outcome of such economic interventions and efforts to change the image of a country to a holiday destination, with the expectation to receive foreign exchange earnings with an assumed comparative advantage, developing countries invest in tourism. These countries are transformed into holiday destinations by the international tourism industry.

The transformation process cannot only be attributed to foreign companies and financial institutions. International tourism organizations also advise developing countries to invest in tourism, therefore being influential in touristification of developing countries as holiday places. Briefly, international tourism activity takes place between tourist generating western countries and tourist receiving countries where the supply is. The majority of international tourist flows are between developed countries. The remaining minor international tourist flows take place in between the developed west where the demand is and developing countries where the supply exists. Since the demand is externally driven, tourism companies at tourist receiving developing countries have to work and cooperate with tourism companies at tourist generating countries. Consequently, developing country firms that do not have control on their tourism supply co-operate with western countries tourism companies that control the demand. Under such in-balanced conditions and power relationships most of the economic benefits accrue to the developed countries (Britton, 1996).

Table 8. Relationships between Tourist Generating and Receiving Country Firms*

Generating Country	**En Route**	**Receiving Country**
Multinationals.	International Firms	National Firms and Tourism Elites
Big Firms	Transportation	Local Entrepreneurs and National Firms
Marketing and Sales Network	Airlines	MNTC Representatives and Petty Entrepreneurs
MNTC, Multinational Tourism Corporation Headquarters		

Source: Adapted from Britton (1996).

Multinationals affect the local tourism industry structures and the native people employed in tourism at developing country destinations (Ascher, 1985:62-66). At developing countries, the main tourism enterprises are operated by multinational tourism corporations. Tourism is an industry that operates for and is operated by foreigners. This is inevitable as inbound tourism demand to developing countries is external, comprising of foreigners, and domestic tourism demand is very low at developing countries. Those who operate tourist businesses and are employed in tourism are either from foreign countries or are outsiders from other regions of the country. A major part of tourism businesses such as hotels, lodging units, restaurants, bars, travel firms etc., may be owned or operated by people from metropolitan cities. Whether the ownership structure is foreign or national depends on the development level of the host country. Foreign ownership in the industry diminishes the economic gains derived from tourism. Foreign owned and operated tourism establishments and international companies employ foreign, expatriate staff. Salaries and wages paid to the foreigners are leakages from the national economy. There is also domestic inner migration to the regions where tourism develops. In the regions where infrastructure and superstructure investments are realized to develop and facilitate tourism, at the initial phases of the investments, a labor force from less developed regions of the destination is employed. Also, as economies of scale is dominant in investments and operations, only small and medium sized enterprises and unattractive economic activities are left to the natives. Thus, an economic structure is set up where at the very top multinational tourism corporations and at the very bottom local petty entrepreneurs take place as;

1. Multinational Tourism Corporations
2. Representatives of Tourism Elites
3. Middlemen, Compradors
4. National Domestic Companies
5. Local Petty Entrepreneurs

Tourism is a modern industry and western economic activity that effects all spheres of the overall economy (Britton, 1991:451, 455). It affects the level of development of a country and depending on the degree of economic development and progress of the destination country, it may contribute to the economy to integrate with the economies of the west (Yarcan, 1996:135-144). By the peculiarity of the demand being external, inbound tourists comprising of foreign citizens, a country's tourism supply should be at modern standards to take part in international markets. Then sub-sectors of the national tourism industry transform themselves to modern structures. When a product is standardized to suit foreign consumers then it possesses modern standards. The general economy of the country is affected to the extent that tourism is an integral part of it. Multinational tourism corporation and international tourism companies set up their structures at different countries in cooperation with local tourism elites. Tourism elites are the representatives of the foreign companies at the developing countries. Tourism elites and employees benefit most from this structure.

Multinational tourism corporations invest in developing country destinations in different spheres of tourism, mainly lodging and travel trade sectors. In most of the cases the investments of multinational corporations are organizational rather than physical, such as managing and operating hotels instead of owning the premises. The multinational company is mostly a vertically integrated and a multi-plant firm responsible for large flows of foreign direct investment or equity investment and owning major sectors of industrial activity in a number of countries (McQueen, 1989:285). A multinational company can be defined as an enterprise that owns outputs of goods and services that originate in more than one country. It is also defined as a firm that engages in the production of goods and services in two or more nations. "International involvement is taken to mean any form of transaction by an enterprise outside its national boundaries in which assets, rights or goods are transferred and there is some continuing de facto control over the use of these and complementary resources" (Dunning and McQueen, 1982b:71). The multinational company does not necessarily have to own foreign production assets since it can hire the resources; such is the case in the accommodation sector. "An international hotel chain may exert complete power on a hotel attached to the chain that is located in another country without any equity participation" (Dunning and McQueen, 1982b:71).

In theory, hotels, airlines and local tour operators of a developing host country may be able to market and sell their products without any need for foreign tourism companies. But this is not the case in a country where inbound tourism demand is externally driven and demand originates from developed western countries. Multinational companies have knowledge on travelers' needs and market expertise and know-how in operations. These companies possess an accumulated knowledge and expertise of what to produce and market. Let it be tour operating business or hotel operations or airline business. The reasons for multinational tourism companies to be involved in international tourism effectively are: greater knowledge of the market conditions, better knowledge of international tourism trends, high investments in training within the company, better generation and use of management expertise, effective use of accounting and information, opportunity to use transfer pricing techniques between different subsectors, increasing the efficiency of the company by marginal investments, transfer of knowledge and knowhow by contractual agreements, availability of electronic reservation and operation systems for the premises, sourcing of furnishing and fitments at lower costs, and superior quality and design (Dunning and McQueen, 1982a:57-59; Dunning and McQueen, 1982b:83-84).

Companies aim to lower production costs through high investments and vertical integration and also horizontal integration, reaching economies of scale. Economies of scale is the case where the cost of production per unit of production, good or service decreases as inputs of production increase. If companies that function in the same or similar sectors integrate and the size of the parent company enlarges, then per unit cost of production decreases. In the transportation sector, larger cruise ships and wide bodied aircrafts are used. In the hospitality sector, multi-unit accommodation establishments, either a cruise ship cabin, airline seat or hotel room, are constructed in order to decrease per unit tourist product cost. "Furthermore, there are economies of scale in production through specialization" (Sinclair and Stabler, 1997:86). In the accommodation sector, "economies of scale can occur either at hotel level or on a corporate level" (Litteljohn, 1985:161). An individual resort hotel or a chain hotel achieves economies of scale through linking and integrating with a tour operator. A city hotel may join a chain hotel management company by a contractual agreement and / or leasing or franchise agreement. A local accommodation unit may achieve efficiency by joining an electronic distribution and reservation system. It may join an information communication technology network of an international hotel chain and / or hotel management company. All of the methods aim to attract clients through which the accommodation unit has become a part of and thus has been transformed to an extension of the parent company. Economies of scale provides a company monopolistic advantage in production, marketing, and advertising activities. When a firm vertically and horizontally integrates and specializes in international production across borders, it achieves economies of scale. Economies of scale in specific tourism infrastructure investments and physical tourism facility investments at developing countries foster this process.

An integrated parent company mass produces different and varied tourist products with an aim to lower costs. As the scope of the parent company's economic activities widens and penetrates into new production types by making marginal investments, it produces more of the same products using common inputs and components by which it reduces the average production costs. "Economies of scope refers to lower costs associated with the joint provision of more than one product or service, rather than producing each separately. Economies of scope does not accrue from scale, but from variety" (Vanhove, 2005:121), through joint production and provision of different products at the same time. Economies of scope also leads to economies of scale. When the same types of companies horizontally integrate, different units of the companies make use of the same component parts in production and thus lower the average costs. This is also the case in diversification, which leads to economies of scope as the same company produces more than one product that is complementary. Diversification is the case where a firm owns several producers of different products (Dwyer and Forsyth, 1994:519). Economies accrue when a firm produces and sells a variety of related products. Through diversification, lower production costs are achieved and the tourism enterprise enlarges its market. A diversified tourism conglomerate company structure is one in which a parent company owns tour operators, travel agencies, accommodation units, airlines and other travel service providers in the inclusive tour / holiday production and value chain. There might be contractual agreements between different companies rather than ownership in diversified production and integrated company structures. In accordance with its diversification, know-how, expertise, managerial and operational experience, an international hotel chain enters new markets more effectively and strongly. "The reason is that, a diversified international hotel chain has abundant knowledge, experience and intangible assets and logistic skills which make it easier to penetrate into a new country with low transaction costs than a new hotel" (Dunning and McQueen, 1982b:84), without realizing any physical investments.

Integration in Tourism Industry

Tourist product components are dependent on each other. So, it is logical for one parent company to produce these products within its own production and supply chain. An organized packaged tourist product is a different entity than its constituents. The main characteristics of it is the complementary nature of different services that make up the final product. If the parent company diversifies into different but related business activities, it regulates different constituents of an organized tour or an inclusive holiday. The standardized homogeneous tourist product leads to integration between tourism sectors that produce different components of the product. The standardized tourist product is both the reason and outcome of integration. Different types of tourism businesses integrate with each other due to the nature of the product that is little differentiated and organized as a single entity whose integral parts cannot be separated. At management level, the industry mainly comprises of tour operators, travel agencies, airlines and the accommodation sector that are interdependent of each other. Hence, the main inputs of an organized tour are also interdependent. The component nature of an organized tour leads to integration of related companies, basically travel trade, transportation, accommodation and other ancillary companies whose services enrich the holiday experience.

Vertically and horizontally integrated giant companies affect international tourist flows and destinations. Vertical and horizontal integration within the same company creates diagonal integration. Banks, financial institutions, real estate firms, telecommunication companies, information technology and communication companies invest in tourism integrating with tourism business both at national and international levels. Integration is a structure where a parent company owns or commands some or all of the resources of the production supply chain. The parent company administers the supply chain. Although its degree changes in different sectors, integration is a very common company structure. Through integration, the parent company commands all phases of tourist product production, consumption sequence and patterns, as well as the preferences of tourists (Holloway, 1987:82-87). Integration enables the parent company to assure a certain level of tourism service and product quality with sellable prices, fares and rates. Geographies in international leisure travel are different locations. Most of international tourism demand originates from and is concentrated at western countries. The demand should match the suitable, quality tourism supply at the destination that is mainly quantified by quality hotel accommodation capacity, modern physical facilities, assured organizational tourism and travel services. Integration provides the parent company the ability to balance the inbound international demand with the destination's available tourism supply. The supply is composed of urban and tourism specific infrastructure, accommodation, local transportation and travel industry services, leisure, recreation, entertainment and shopping opportunities as well as natural, cultural, man-made tourist attractions, museums, local tours and sightseeing, guiding and other facilities and services tourists use.

In the development process of the industry, companies operating in tourism and their services are internationalized. The internationalization process eliminates production uncertainties and guarantees resource allocation for the company. As noted, the complementing nature of the standard product leads to integration between different constituents of the tourist product and the companies producing them. Integration enables the parent company to guarantee a minimum level of service quality. In a developing host country, the highest quality of tourism service with acceptable prices is made available through integrated company structures and a production chain. Since developed countries generate most of the international tourism demand, tourist products and services of a developing country have to comply with the expectations of westerners. The western tourist seeks and searches for western, modern, international standards at competitive prices. The existence of rich resources is only a prerequisite that provides a partial comparative advantage to tourism destinations. In order to have a competitive advantage, resources should be turned into tourist products, be accessible and offered at competitive prices. Also, tourist products and services have to be standardized and supplied at western norms accompanied with modern facilities. Just because the culture is rich, tourists would not accept any level of service. Tourist's search for western facilities and amenities leads to achievement of a certain quality level, quantity, price, efficiency and standard of product, that all provide power to the travel industry (Ritzer, 1999:135-140). Standardization enables economies of scale and a decrease per unit cost of products.

Integrated companies produce quality tourism services that meet the expectations of consumers. Supplying quality products at underdeveloped destinations necessitates the importation of modern tourism structures. Hence, multinational tourism corporations establish their subsidiaries in the tourist receiving countries. The lack of a developed national tourism industry allows multinationals to establish their extensions and branch offices at developing countries. To quote the case in the accommodation sector, international hotel chains are efficient in developing countries. The physical supply and capacity are created at destinations to suit the needs of western travelers. But as the destination countries do not have the know-how and expertise to run them, operation and management of accommodation capacity by foreign hotel chains is inevitable. Local hotels are linked to the parent company by contractual agreements, a process by which they become an extension of international hotel companies. International hotel companies do not invest in physical assets but operate the local premises by agreements, such a franchising, management agreement, leasing or a combination of these operation types. "The prevalence of contract control can be explained by the power of the international hotel company in gaining economic rents through knowledge of markets and inputs and by their ability to coordinate a large range of complementary activities in producing a superior quality product than local hotel" (Dunning and McQueen, 1982c:99). The abundance of contractual agreements in the hotel sector rather than direct investment is related to the high fixed costs of investments, risks in a volatile industry and losing the flexibility of the hotel company.

Integration can take a variety of forms, ranging from total or partial ownership of production activities to contractual arrangements between firms under separate ownership. In the context of tourism, integration occurs among tour operators, between tour operators and travel agencies, transportation companies, cruise lines, hotel chains and catering units, leisure facilities etc. The extent and types of integration are important because of their effects on the tourist receiving and origin countries (Gomez and Sinclair, 1991:67). Main types of integration are both vertical and horizontal integration. Economies of scale created by integration affects the tourism industry in many ways. "As well diversification and commercial agreements between firms having no common ownership affect the structure of international tourism industry" (Dwyer and Forsyth, 1994:518). If the type of tourism developed is coastal beach tourism at a destination, then an integrated tourism industry structure is observed more. "More importantly, the greater the extent metropolitan firms promote a destination, the more incentive there is for these firms to ensure the stability and viability of their operations through direct commercial participation within the same destination" (Britton, 1996:157).

Vertically integrated structures first emerge in tourist generating countries. Also, the same or similar sectors horizontally integrate to achieve market enlargement. Tourism enterprises depend upon each other in servicing their products. At the production, consumption and servicing phases each component of the organized tour or holiday depends on the other components. Although different tourism enterprises produce varied products, these enterprises closely cooperate with and depend upon each other in order to sell their product and capture the market. Large amounts of inclusive holidays are produced by economies of scale where firms integrate in order to get the benefits of a big company. An integrated parent company is able to dictate tourists' consumption patterns and holiday behavior. As already noted, integrated tourism company structure is related to the maintenance of the balance between demand and supply. Integrated networks enable demand in the tourist origin country to be matched effectively with the tourist receiving destination's supply. The integration relations between the companies may be part or full ownership, franchising, management agreement, licensing, marketing collaboration, consultancy and technical assistance, common electronic product distribution systems and use of common reservation, management and operation systems. Despite its advantages, integration has drawbacks such as increase in fixed costs, risks involved in foreign investments and rigid structure of the parent company.

"Vertical integration entails the coordination of production by firms supplying different types of output within a production sequence, in which the outputs of some of the firms are the inputs of others … Such relationships include total or partial ownership, industrial collaboration, sales franchising, licensing and other contractual arrangements" (Gomez and Sinclair, 1991:68). In vertical integration, companies working in different economic sectors closely cooperate with each other, by which a main company controls the inputs of production, financial transactions in the value chain and also distribution and marketing of the product. The parent company produces a product at one stage and is also a producer at another stage of production. In vertically integrated structures, different stages are added to the production sequence creating a supply value chain while creating the final product.

"Vertical integration between firms at different stages of the production process is interesting in the context of the tourism industry, within which production almost invariably takes place in different geographical locations" (Gomez and Sinclair, 1991:70). The vertically integrated tourism structures range from firms that are specialized in one tourism market to highly integrated companies involving tour operators, travel agencies, transportation companies and hotels (Gomez and Sinclair, 1991:85). Vertically integrated structures do not necessarily involve ownership, on the contrary such structures are created predominantly by contractual agreements, especially when there is foreign involvement. Through contractual relationships, the parent company exerts power on the principal service suppliers that take place in the value chain.

Integrated tour operators own leisure airlines, and hotel management firms, they also own retail travel agencies in order to distribute tours more efficiently at low costs. Integrated tour operators also own other travel businesses, cruise lines, inbound tour operators and other ancillary service companies in the form of joint ventures. In an integrated structure, tour operators work in a monopolistic situation, channeling demand and managing all phases of an organized tour, from production to marketing and tour operations. There are a number of reasons for integration of tour operators, airlines and accommodation companies from the point of view of each company. The main reasons of integration for tour operators are to decrease cost of transaction between the firms, achieve economies of scale, manage quality of the tourist product, control prices of tourist product components, regulate all phases of tourists' consumption, increase the parent company's market share and also to match tourism demand with supply effectively (Yarcan, 1996:56, adapted and modified).

The internalization process eliminates production uncertainties and assures allocation of resources for the company. The tourism industry with its vertically integrated structure is a good case of the internalization process. The organized tourist product is a single entity and its transactions are realized by tour operators. The tour operator reaches economies of scale by internalizing transactions, hence reducing costs. Vertical integration provides economies in production, marketing and economies in tour operations. In a vertically integrated company, "transfers of intermediate goods and services within the firm are governed by internal transfer prices, largely at the discretion of management, rather than by market prices" (Buckley, 1987:191). Vertical integration is one of the efficient methods of internalization. "Internalization is an important strategy in maintaining and increasing market share and gaining competitive advantage" (Litteljohn and Beattie, 1992:28). "Internalization advantages can also be achieved through partial ownership sufficient to allow an enterprise de jure control over resource allocation. But, in the case of hotels, these benefits are obtainable by some form of contract. The host countries will accept the contract-based power of the foreign hotel chains when they are not able to supply the market themselves" (Dunning and McQueen, 1982c:80). The close cooperation between tourism businesses and enterprises does not only include accommodation, the travel trade sector and transportation companies. Enterprises such as banks, insurance companies, real estate firms, land developers, information technology firms and telecommunication companies also invest in tourism. The use of human labor and resource is intensive and know-how is an important asset in tourism. Therefore, marketing agreements, global distribution networks, electronic information media, and communication technologies are other ways of protecting the economic rents that accrue to the tourism companies in a vertically integrated system.

Another major stakeholder financing both supply (e.g., tourism organizations) and demand (e.g., traveler) are the financial institutions. Banks also play an important role in integration. Banks perform tourist expenditure and foreign exchange transactions. Commercial banks exert power on the tourism industry. The two types of banks involved in tourism are commercial and specialist tourism banks (Yarcan, 1994:64-66). Commercial banks are involved in tourism in developed countries. Specialist tourism banks are founded in developing countries where the tourism industry is in the infancy stage. Until recently, banks and finance companies were integrated with the tourism industry and tourism enterprises mainly in Europe. Finance companies are powerful agents of tourism as they issue credit cards, and travel and entertainment cards. Banks issue travelers' cheques and travel vouchers used for payments by tourists and travel companies. Banks mostly invest in the tour operation business of the tourism industry. Banks realize tourism investments to maximize their profits, distribute risks and control an economic sector through marginal investments. Banks set up close links with the tourism industry. Mostly, the links between banks and tourism companies involve a credit and operation capital relationship. Banks also invest in the tourism industry. Banks provide investment and operation capital to tourism enterprises, realize tourism investments, hotels etc., develop land to benefit from land value appreciation, provide leasing services for rent a car companies and airlines and issue travelers' cheques, travel service vouchers and credit cards (Yarcan, 1994:64-66).

Initially banks and tourism enterprises were in credit relationships. Seasonality and cash flow problems cause tourism enterprises to receive credits from banks. Credit relationships might lead the bank to have an investment in tourism if the credit is not paid back. Banks and tour operators have credit relations due to cash flow problems in the travel industry. There is a lag time in receiving tourists' payments and prepayments realized to service suppliers which creates bottlenecks in cash receivables and revenues. This bottleneck is exemplified with the seasonality in tourism. The links between banks and tourism companies are banks and accommodation firms for investments and operation capital, and banks, airlines and rent a car firms for leasing vehicles. Banks invest in accommodation establishments, run tour operators, operate leisure airlines, invest in shopping malls, recreation facilities and land development projects etc. Some holding companies own hotels, travel agencies, tour operators, marinas, and duty free shops. These tourism investments can be linked with the bank of a holding company. Banks issue credit cards, travelers' cheques and travel vouchers (Britton, 1991:457). By issuing credit cards, banks distribute credit, earn commission and card fees. By issuing travelers' cheques banks receive cash deposits with no interest and receive earnings on transactions. By issuing travel vouchers, banks receive commission when payments are realized. Automatic teller machines transform banks into powerful media in realizing tourist expenditures and financial transactions related to tourism. Specialist tourism banks function in developing countries, provide credit for hotel investments as well as operating capital, and act as intermediary between foreign banks that provide credit and domestic tourism entrepreneurs. Specialist tourism banks invest in hotels, travel firms, marinas etc., to form integrated tourism enterprises.

IX Business and Incentive Travel[1]

Business Travel

Business tourism is defined as leisure activities in conjunction with business travel. Economic growth and development increase the volume of business travel. Travel industry provides special services for business people. Business people's travel and destination depend on their business aim and economic relationships. Business travelers are semi-tourists and less cost-sensitive than leisure tourists. Since the travel expenses are paid by third parties, business peoples' and incentive participants' personal expenditures are high at the venues (Lickorish and Jenkins, 1997:55-56). Business travel includes all activities, same day travel or overnight stay where business is the principal reason to travel, excluding commuters (Wootton and Stevens, 1995). There are fluctuations in business travel volume due to political and economic instability, recession, wars, crises and other uncontrollable factors.

The Silk Road is the longest business travel route that has stimulated the growth of support systems for business travelers. The support superstructure comprises of lodging facilities, inns, caravanserails, restaurants, transportation services, camel traders and guides. The Silk Road is the route on which goods, scientific inventions, ideas, and beliefs moved from Asia to Europe and vice versa. The Silk Road created a network of en route destinations that remain as major trading cities ever since (Swarbrooke and Horner, 2001). The crucial role of Istanbul as a commerce center, trade port and world city is maintained partly due to the Silk Road. The Industrial Revolution increased the scale of production to be transported and marketed. Fast and cheap railway transportation enabled business people to travel to distant locations with less time and monetary cost (Montgomery and Strick, 1995; Swarbrooke and Horner, 2001). The volume of international trade, business and economic transactions increase worldwide with new economic and political relationships. The European Union fosters the growth of business and leisure travel. Business, corporate, incentive travel and meetings increase due to the development of international economic and political relationships. Hosting business people, meeting delegates, incentive travel participants and exhibitions provide economic benefits to venues. Business and corporate travel is necessary for the companies and their staff in production, marketing, product distribution and sales processes. If there is economic progress in a region or country, business tourism develops. Headquarters of multinationals, and their branch offices located at different regions increase the volume of corporate and

1 Adapted and modified by Yarcan, Ş. PhD. from Arslan, Özer., Bilen, Y. Birhan, and Şahin, M. Ferit. 2002. Marketing Istanbul as an Incentive Destination, and Göker, Petek, Özsoy, Soley, and Sönmez, Zeynep. 2003. Incentive Travel Organization. Research projects were submitted to the Tourism Administration Department, Boğaziçi University, Istanbul.

business travel. National and international companies' headquarters and their branch offices have links with each other and there are employee and staff movements that take place in between them. Since business travel is necessary for the companies' success and profits, even during recessions, the demand continues, though at a low pace (Lickorish and Jenkins, 1997:55).

Business travel, incentive trips, participation in meetings and exhibitions contain leisure tourism elements and activities that are collectively called MICE, Meetings, Incentives, Conferences and Exhibitions (Gee and Fayos-Sola, 1997:25). Business tourism is composed of and related to corporate travel, incentive travel, meetings, fairs and exhibitions. Corporate travel, and travel of company staff and employees comprises a part of business tourism that may involve a corporate meeting, product launch organization, training or an incentive event trip. In all of these activities, business people, company staff, and employees use the services of airlines, hotels, restaurants, recreation, leisure and entertainment facilities as well as the services of travel industry companies of which a few are specialized in providing services for business tourism and business people. Expert companies such as professional congress organizers, incentive houses, destination management companies and in-plant travel agencies within the company premises serve for business people and meeting participants or delegates. Corporations often have a department that handles aspects of business travel and corporate meetings. Developments in transport modes and aviation industry, low-cost airlines, and high-speed railway transportation help to improve economic relationships. The corporate firm is the demand generator for business travel and incentive travel, a sub-section of business tourism. In corporate travel, specifically designed programs that inspire employees based on venue selection, on-site events and activities are offered. The aims of corporate meetings are training marketing and sales employees, organizing sales seminars, brainstorming on new product ideas, introducing new products, building the team spirit among employees, rewarding employees for their performance and presenting the company's strategy and mission statements.

Business travel is affected by economic circumstances and conditions, and economic growth and development level. As economies prosper and relationships between countries are achieved, the volume of business travel as well as leisure travel grows. Growth in business tourism and increase in tourism demand are related. Specialist travel companies offer tailor-made travel packages and make contributions to the business travel market (Astroff and Abbey, 1995). The existence of purpose-built physical facilities, such as the existence of special meeting facilities, halls, and convention and exhibition centers favorably affect meetings and the choice of venue. Business tourism, the meetings market and incentive event organizations are not only different in character and operation than standard organized travel, but also more profitable compared to the leisure tourism types such as sojourn holidays, cultural tours, pilgrimage visits etc. Business people, meeting delegates and incentive trip participants also spend more than leisure tourists.

Characteristics of Business Travel

As economies prosper and relationships between countries get closer, the volume of international business travel increases. Growth in business travel and increase in leisure travel demand are related. Business people utilize their free time as a leisure tourist and consume tourism services. International business travel is affected by general and venue specific factors. Similar to the characteristics of tourism demand, the general demand factors for business travel are economic growth and development in the world, employment generated, emergence of new industries, development in services sectors, information and information communication technology, finance, banking and insurance as well as scientific developments and progress. Other factors that affect business travel favorably are emergence and existence of nongovernmental organizations, professional associations, international organizations based on shared interests, professions or hobbies, and existence of international and multinational corporations. Venue specific factors that affect business travel demand favorably are use of new transportation modes, executive or business class seats and services on airlines, low-cost airline services in between major cities and urban centers, specialist organizers that provide expert business services, existence of in-plant travel firms, corporate travel firms and hotels with corporate market departments, role incentive houses and destination management companies concerned with organizing business-related tourism activities. Other venue specific determinants that affect business related tourism are marketing of cities as venues through professional bodies, investments in meeting halls, exhibition centers, city hotels with business centers, office equipment and support services (Swarbrooke and Horner, 2001). Also, ancillary services such as secretarial offices, simultaneous translation equipment and translators, guiding services, sightseeing opportunities, shopping facilities etc., are determinants associated with the venue. The existence of developed urban infrastructure, local transportation facilities, accessibility, developed economic and commercial business, the tertiary sector, scientific progress etc. affect the volume of business travel. Headquarters of international companies that are linked with their branch offices at different regions increase the volume of corporate and business travel. Incentive and meeting organizations that depend on economic circumstances also contain tourism constituents like transport, lodging, social programs, sightseeing etc. Incentive participants, meeting delegates, and business travelers may return to the venue as leisure tourists.

Statistically, all travelers are recorded as tourists. All travelers are not tourists. Travelers are classified according to their travel aim and motivations. Recreation travelers, and leisure tourists are real tourists; business travelers, incentive travel participants, and meeting delegates are semi tourists and other travelers are non-tourists, even if they use the services of the travel and tourism industry (UNWTO, 1995:22, cited in Gee and Fayos-Sola, 1997:6; adapted from Lickorish and Jenkins, 1997:53-56). Some common characteristics of business, incentive travel and meetings are as follows. The business traveler's venue is decided by the corporation or company; in the case of meeting delegates by associations or scientific organizations. Travel time is decided by the firm or corporation; in case of meetings by associations or scientific institutions. The volume of business travel, incentive trip organizations and meetings depends on economic circumstances and scientific developments. The more a country develops, the more the demand will be because business tourism demand is an outcome of economic development while meetings are associated with scientific achievements. International business tourism demand increases due to economic relationships and transactions between countries and it is concentrated among western developed countries and newly developed countries such as BRICS, Brazil, Russia, India, China and South Africa. The cost of travel and business people's expenses are paid for by companies and expenditures are tax deductible. As the expenses are paid by third parties, business peoples' personal expenditures are more at the venue and destination. Business travelers' visits to other countries and their domestic travel are due to their professions, commercial activities and economic links. The activities of business people comprise a part of tourism, since employees and business people take part in leisure activities during their free time in the course of their professional activities. Business travel, corporate meetings, and incentive organizations comprise a part of tourism. The participants of such activities, i.e., employees or business people, take part in leisure tourism during their non-business, free time, or leisure time. Thus, they create a leisure tourism demand (Lickorish and Jenkins, 1997:56).

Incentive Travel

An incentive event is a special travel type that a company offers as a reward to recognize the productivity and success of employees or sales agents. Incentive travel comprises of corporate and creative leisure activities through which unique and memorable travel and holiday experiences are offered. An awarded trip blended with an enjoyable holiday is earned by the participants that have certain professional qualifications. Corporate firms consider an incentive event as a means to improve team work, success and efficiency. Incentive travel is a means to motivate employees, the sales force and retailers to improve their performance. A prospective participant is expected to meet a specific, measurable objective or target within a pre-set period of time, like achieving a sales quota. In accordance with their success, selected employees and sales agents are eligible to participate in the incentive event. Incentive events motivate employees to work harder towards a common goal and provide a travel or holiday gift that would otherwise not be bought. Hence, an incentive event is financed by corporate firms that expect to receive a future return from the participants (Mair, 2015). Since noncash awards are tax deductible, the companies do not pay tax or social security tax when they organize a travel event as a gift. Incentive travel products differ from other forms of tourist products. Banquets, outdoor leisure activities, and sightseeing tours are organized as an integral part of incentive organization as the goal is inspiring the participants, and increasing communication within the company and among the staff.

Incentive travel organization necessitates expertise and special types of travel companies. The company that produces some or all elements of an incentive event organization is an incentive house. An incentive house is located at the country where the demand for the event originates. An incentive house purchases different services from suppliers: airlines, hotels, food and beverage units and destination management companies at the venue. An incentive house deals with the communication among the branch offices of the company, sales outlets, and between company headquarters. It announces the venue and the awarded incentive events for different sales quotas and productivity targets. A full-service incentive house proposes a broad range of award choices, promotes the event, provides communication, and carries out administrative and performance evaluation tasks. A full-service incentive house assists prospective participants at all stages from communications with the company to information on sales quotas, nomination procedures, and details on prospective venues and event organization. Companies request incentive proposals with an itemized cost and event flow. A destination management company is a specialized firm at the venue that offers the land component of the travel gift as a package to the incentive house. A destination management company also caters for companies that request venue services for events comprising of a small number of participants for an incentive house to handle. It arranges all venue services from accommodation and local transportation to creative events, unique meals and entertainment (Sheldon, 1995). Based in popular venues, they provide all services, hotel reservations, local transportation, elaborate events, meals, and attractive on-site experiences most participants can't obtain on their own. The main business partner of a destination management company is an incentive house. An incentive house plans and presents a pre-determined event program to and requires venue services from the destination management company. The destination management company is a specialist firm operating solely in an incentive market. Its turnover is low, but profit margin is high. The same holds true for an incentive house. Corporations create demand for the incentive house for an event organization. Usually, a full-service incentive house bases its activities on a few corporate accounts. The majority of incentive houses work with a portfolio of companies at regular time intervals. Briefly, corporate firms create demand for an incentive house and the incentive house creates demand for the destination management company. The destination management company's client portfolio are incentive houses. Unless the participants are low in number and event organization is not comprehensive, a destination management company is not in direct contact with the corporate company. If an incentive event organization does not necessitate very detailed work and the participants comprise a small group, then a company may prefer to contact the destination management company directly.

Incentive Event Organization and Operation

The incentive event is planned at least a year in advance. An incentive organization starts with the inquiry of a corporate firm to realize an event for its employees, sales force or retailers. The creation of an incentive event is initiated with the recognition of an award for the employees or product retail representatives of a corporate firm. The gift may be an awarded holiday along with a product launch meting or an education seminar. Corporate firms mostly work with a full-service incentive house that supplies all related services. The process continues negotiating with the incentive house and the company that requests an event informs the incentive house about the event particulars, date, duration, theme and the particulars of the venue. The approximate budget, a critical factor in the organization of an event, is disclosed to the incentive house. Once the corporate firm confirms the overall structure of the event and possible venues, the incentive house designs a tentative program coherent with the purpose of the activity. Depending on the budget and the possible number of participants a few prospective venues are proposed by the company.

Subsequently, the incentive house contacts competing destination management companies at selected venues. The incentive house transmits the outline of the event and estimated budget to the destination management companies. The incentive house requests an operation outline and a quotation for the designed event including service details and options at the venue. The destination management company plans and prepares the venue service details as a whole. The incentive house reviews and modifies the proposed venue program. The incentive house combines all services into an organized single entity, adds a profit margin and submits it to the company with the total budget. If the company requests modifications of event details, the venue, cost items etc., are revised. The destination management company should be able to offer a detailed event sequence together with quotation within a few days. The submitted total budget and per person rate include diverse activity options for more than one venue. Once the venue and program detail decisions are concluded, the process continues with an inspection trip of the selected venue, during which planned venue service details are observed, inspected and consumed. Corporate firm representatives may also join the inspection trip. After the approval of modifications and a final quotation, incentive event details are announced to prospective participants. The company makes advance payments to the incentive house of which a partial sum of it is transferred to the destination management company and suppliers at the venue. The operation process continues with actualization of the incentive travel, realization of venue events and feedback received from the corporate firm.

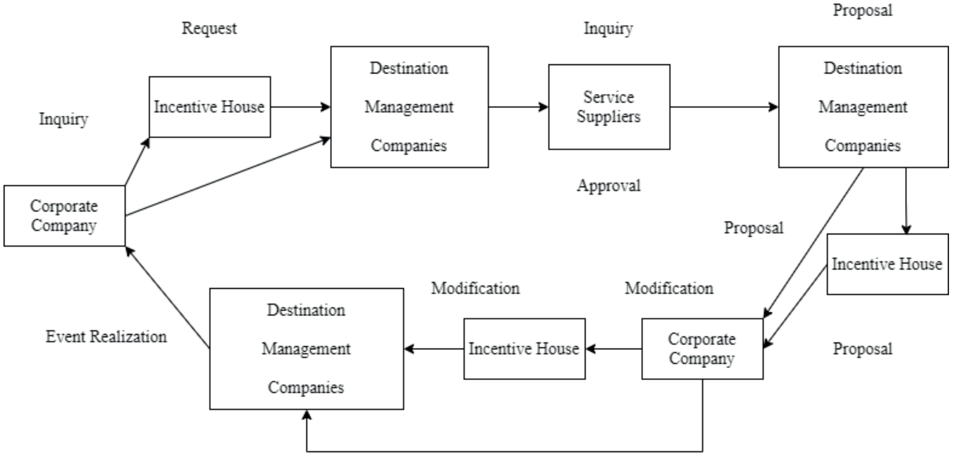


Figure 5. Incentive Event Operation Flow

Incentive Product, Organized Tours and Niche Products

A destination management company and incentive house are directly involved in the creation of the event. Incentive event planning and preparation takes a long time; the event organization starts a year in advance. Therefore, incentive houses and destination management companies are involved in operation over a long time span. Operation of an incentive event differs from organized and standard tours. Incentive travel includes overnight stays in high-quality city hotels and meals at upmarket restaurants. In organized tours and mass tourism, holidays are decided and bought by the individuals whereas in incentive travel, the venue and event date are decided by the corporate firm. Culture tourists or wanderers choose activities that suit their interests and hobbies best. Coastal leisure tourists seek a nice holiday on the beach. Incentive trips are rewards and motivational means whose main aims are to create socialization among members, creating group harmony and team building. The participants are expected to take part in and contribute to the activities. Although a niche tourist product such as a cultural tour includes tailor made constituents, it is still a standard product in comparison to an incentive event organized upon specific and special demands. Niche products are produced at high cost due to their unique characteristics and components. Bulk purchasing is not possible in the niche market due to low demand. Incentive travel is expensive due to its customized nature. An incentive product can't be standardized as the aim is to live a unique travel experience. An incentive product's attractiveness is its creativity and variety. The characteristics and travel motivations of the participants differ from leisure tourists. Companies create incentive travel demand and pay the cost. Organization and operation are realized in accordance with the requests of the corporate firm. Incentive travel has the highest per person cost in the tourism industry. The cheapest is an all-inclusive holiday in coastal mass tourism, where price competitiveness is the most critical factor. Incentive services are partially or fully paid in advance. Payments to suppliers in other markets are on a credit base.

Incentive Venue Choice Factors For Istanbul

A few inbound tour operators also work as destination management companies. Most inbound tour operators do not specialize in incentive travel. Even if a travel company operates as an inbound tour operator it might as well work in the incentive market. Membership of local tour operators to the Society of Incentive Travel Executives is quite limited. On the other hand, destination management companies act as an incentive house in the domestic market. Custom made incentive products are special, unique and diversified. Although each incentive product has a unique character, differentiation is not fully attained. The constituents of incentive products are similar to cultural tour components at urban centers with emphasis on service quality. Differentiation is achieved by organizing enjoyable events, preparing surprising events, and providing an enjoyable atmosphere and environment. Hence, product price is considerably higher than other tourism markets, as well as profitability. In incentive organizations, high revenues are accrued per activity. The profit margin is comparatively high, but there is also fierce competition. Content of the event depends on the client's budget. Istanbul is a well-known venue and specific determinants relating to the city affect the venue choice. The city's historical heritage is rich, it possesses natural beauty, tourist attractions, diversified products and quality services. Istanbul has a vivid, lively city image with its modern culture co-existing with a traditional life atmosphere. Overall, Istanbul's destination image is quite favorable. The city has a wide network of international air transportation links, with two modern airports. The national carrier, Turkish Airlines, has a very wide flight network; privately owned airlines serve the city and European capitals. Istanbul is well connected with other cities in the country with an extensive flight network. At the periphery of Europe, Istanbul's geographical location provides an advantage. Accommodation units are diversified with appropriate facilities for corporate markets, incentives and meetings, quality city hotels and their capacity suit these associated market segments (ICVB, 2012). Spatially, the hotels are distributed at the old and new centers of Istanbul, at the new business district. Well-known international hotels are abundant.

Publicity, advertising and marketing activities are carried out by incentive travel companies. Marketing efforts of incentive houses and destination management companies are instrumental venue choice factors for Istanbul. Marketing Istanbul abroad by participating in incentive fairs, public relations events and also well-organized inspection trips are necessary venue choice factors. Expertise of destination management companies, their creativity and links with incentive houses affect the choice favorably. High-quality inter-connected local transportation, an integral part of Istanbul's urban infrastructure, is an instrumental factor, although at peak times there is traffic congestion. Other ancillary and support services, their quality and price should be competitive. The determinants that affect the success of an incentive travel organization can be outlined as overall service quality, venue accessibility, international and local transportation connections, availability of physical urban infrastructure facilities, existence of qualified and experienced personnel, destination management company's expertise, its relationship with incentive houses, creativity in event organization, existence of alternative incentive venues, quality accommodation facilities, a well-organized inspection trip prior to the realization of the incentive event, and availability of unique attractions, sightseeing, touring opportunities, qualified guiding, entertainment, leisure, recreation and shopping facilities.

Conclusions

By evaluating the specified advantages and disadvantages of Istanbul as a venue for the incentive market and as a tourist destination, it is possible to reach a few sound conclusions and propose recommendations. The advantages of Istanbul are its favorable image as a vibrant, lively and safe destination, existence of an extensive network of international and domestic air transport, as well existence of high-quality hotels and international chain hotels and the city's developed urban infrastructure. The disadvantages of Istanbul are political instability in the country and region, an unfavorable image of Turkey, infrastructure bottleneck in inner city transportation, high hotel rates, existence of strong competitors and finally, inadequate publicity abroad. Since business tourism and incentive travel are related, publicity activities towards international companies that have branch offices in the city are essential. Also, convention centers and meeting facilities will have a spillover effect on incentive demand. Istanbul should be marketed as a separate, unique product and venue. Creative tourist products other than traditional ones in the market will enhance the chance of the city as an incentive venue. Qualified personnel, expertise and quality of guiding services are key success factors. A successful organization can be created with the cooperation of destination management companies and other service suppliers at the venue. Successful incentive organizations can create repeat business. Istanbul is a city with different cultures and modern attractive facilities. Istanbul's role as a financial, economic, business and cultural center increases its chance of being selected as a venue. Regional headquarters of multinational companies based in the city increase business and incentive travel demand. Terror, insecurity, and wars in the region are serious considerations to take into account for Istanbul that also affect the overall inbound tourism demand to the city. Instability in the economy, economic circumstances and political environment affect the overall inbound tourism demand adversely.

Sample Incentive Travel Itineraries

Day 1

Arrival to Istanbul International Airport in the afternoon.
Transfer from airport to hotel.
Check-in and Welcome Cocktail Party at the terrace.
Dinner at Maiden's Tower watching the sunset.
Gift distribution to rooms.
Overnight at the hotel.

Day 2

Breakfast at the hotel.
Company meeting and lunch at hotel.
Ottoman tour including Topkapı Palace Museum, Harem, Blue Mosque and Grand Bazaar.
Return to hotel for dinner with an Ottoman theme.
Ottoman dressings are delivered to each room for revival of an Ottoman night.
Overnight at the hotel.

Day 3

Breakfast at the hotel.

Treasure Hunting at the Historical Peninsula to motivate the team spirit.

Lunch at a local restaurant.

Return to the hotel for a short rest.

Cruise along the Bosphorus with dinner on board.

Overnight at the hotel.

Day 4

Breakfast at the hotel.

Byzantine tour including Hagia Sophia Museum and Basilica / Underground Cistern.

Music performance inside the Basilica Cistern.

Lunch at a local restaurant.

Stroll to a Turkish Bath.

Dinner at the hotel.

Day 5

Breakfast at the hotel.

Visit the sites at the Golden Horn.

Lunch at Taksim District.

Mevlevi ritual performance at Galata Mevlevihanesi / Convent.

Stroll in Pera / Istiklal avenue.

Gala dinner at Hidiv Kasrı.

Day 6

Breakfast at the hotel.

Transfer to the airport.

Other creative events with entertainment and team building.

X Meetings[2]

The tourism industry consists of different sub-sectors offering various products to different market segments in line with varied motivations and needs. Tourist products in line with the demand type differ from beach holidays and leisure travel to cultural tours and alternative tourist products. An important market is the Meetings Market that have evolved and increased numerically both at the national and international level. Istanbul is the prime venue for international meetings held in Turkey (ICVB, 2012). In the evaluation of a prospective venue and the nomination of a city as a meeting location, the demand characteristics and destination supply determinants are crucial factors taken into account. The general term for all types of meetings and business-related travel organizations is MICE Market, Meetings, Incentives, Conferences and Events. Meetings Industry is a frequently used term encompassing all the cited activities. The MICE market exhibits growth potential, with Southeast Asian Countries along with members of BRICS, Brazil, Russia, India, China, South Africa (ICCA, 2016). Companies and associations tend to choose venues based upon their core business values, expenditure and cost considerations. Associations, organizations and companies tend to choose venues that are near their headquarters. The incentive travel market is more diverse in choosing venues as the companies tend to send employees to attractive long-haul destinations. Development and growth of the MICE market, like the corporate market and business travel, depend upon economic circumstances. Development in international economic and political relations, growth in international trade, scientific developments, the need to share scientific knowledge at academic platforms, worldwide distribution of products and services, increase in the scope of tertiary services and sectors, establishment of new governmental and non-governmental organizations and associations, and the need to communicate between the branches of international / multinational companies, associations and organizations lead to more meetings and incentive event organizations. Whereas unfavorable economic conditions, political relationships, crisis of all kinds, epidemics, terror, wars have the opposite effect.

Numerical breakdown of international meetings indicates clearly that there is a concentration in Europe and North America, followed by Southeast Asia, South America and South Africa. Thus, the distribution of demand and supply for international meetings coincides with that of international tourism demand and supply. Concentration of demand in the meetings market and in leisure travel shows a very similar pattern indicating that high developed countries with economic achievement, high-quality general infrastructure, urban

2 Modified and updated by Yarcan, Ş. PhD., from Birsin, Mehveş, and Mumcuoğlu, Esra. 2006. Venue Choice Determinants for Istanbul in International Meetings Market. Research project submitted to Tourism Administration Department, Boğaziçi University, Istanbul.

infrastructure, as well as tourism and meeting superstructure benefit from this market. The economic and scientific development level specifies the volume of international meetings and where the meetings would have been held. Other than the geographic concentration of the meetings, there is also seasonal concentration. Most international meetings are organized in early and late summer: April, May, June and September, October. The demand in meeting organizations do not coincide with tourism demand and help to alleviate the adverse effects of the seasonality in tourism.

Meetings Types

Associations with memberships in more than one country are identified as international (Berkman and Dorf, 1985:35). International associations hold meetings in countries where they have branches. Meetings taken into account by the UIA, or the Union of International Associations, are those organized or sponsored by international organizations that appear in the Yearbook of International Associations and International Congress Calendar. Details of the events that take place in the Calendar records cover locations of their principal organizations, congresses, conventions, symposia, and regional sessions, grouping several countries and also national meetings with international participation organized by national branches (UIA, 2016). National associations extend an invitation to the headquarters to host a meeting. Most association meetings are repeated at regular intervals. The venues change and rotate. Association meetings are usually held for a duration of 4-5 days (ICCA, 2016a.). The duration of association meetings is almost the same as incentive trips. This is due to the main businesses of companies, employees' duties, the functioning of associations and educational responsibilities for academic meetings. The meeting is an event where the primary activity of the delegates is to attend educational sessions, paper presentations on a theme, participate in discussions, socialize and attend other organized events. A meeting might have an exhibition component (Convention Industry Council, 2016). International meetings are "Meetings organized or sponsored by 'international organizations,' International Non-governmental Organizations and Intergovernmental Organizations with at least 50 participants" (UIA, 2016:13). Terms used for meeting types are congress, convention, conference, seminar, symposium, panel, workshop, assembly, forum, product launch meeting, incentive travel organization and exhibition, (Convention Industry Council, 2016). The Meetings Industry Terminology Dictionary published by IAPCO, International Association of Professional Congress Organizers, defines main types of meetings. The definitions that are also adopted and used by the ICCA, International Congress and Convention Association, are:

Meeting, a general term indicating the coming together of a number of people in one place to confer or carry out a particular activity. Frequency can be on an ad hoc basis or according to a set pattern, as for instance an annual committee, etc.

Incentive, an event as part of a travel program offered to a company's participants to reward previous performance.

Conference, a participatory meeting designed for discussion, fact-finding, problem solving and consultation. As compared with a congress, a conference is normally smaller in scale and more select in character, featuring to facilitate information exchange.

Exhibition, an event at which products and services are displayed (ICCA, 2016a).

Delegates convene at a venue in order to discuss a predetermined theme and topic. The company that deals with the organization of meetings is a professional congress organizer that also organizes pre and post congress tours, daily sightseeing tours, as well as other social events. The main duties of a professional congress organizer are assisting and advising for the determination of the venue, realizing allocations and bookings at hotels and accommodation units, advising on congress centers, providing meeting facilities and technical equipment, employing expert personnel during the course of the congress, and re-numerating hosts and hostesses on a part time basis. A professional congress organizer has the task of announcing congresses to prospective delegates, advertising and marketing the meeting, and keeping the records of the delegates. A professional congress organizer creates a slogan in line with the meeting theme and calls people to attend. Its duties are very detailed: performs the registrations, keeps the documentation, prepares the budget, pre-finances the preliminary expenses and performs all the other necessary duties and carries out the processes of a meeting such as social events, sightseeing tours, pre- and post-congress tours etc.

Venue Choice Determinants for Cities

There is a concentration of meetings organized in developed countries and world cities. International association meetings are defined by the ICCA, International Congress and Convention Association, as, 'Meetings held on a regular basis with at least 50 delegates and rotate between at least three countries', (ICCA, 2016b). International meetings are organized mostly in cities that meet the criteria to be a world city. World cities are urban, cultural, economic, commercial, financial, art, leisure and recreation centers. The economies of world cities mostly depend on the services sectors and there are more international associations and companies and their headquarters in those cities. Such cities are also centers for academic and scientific achievements, modern culture, fashion, tourism and production of services such as insurance, banking, finance and advertising etc. The developed infrastructure of a city, which is important for urban tourism, is an asset for metropolitan cities in attracting international meetings. Meetings help the national economy, and they create repeat tourists and delegates (Chon and Oppermann, 1997). Expenditures of delegates and their spouses are higher than leisure travelers. The delegates' meeting related expenditures are either tax deductible or paid by their institutions or companies. Expenditures incurred by the organizers for conference centers, halls, meeting facilities, technical equipment, simultaneous translation, local transport etc., contribute to the economy of the venue. There are also other economic contributions such as expenditures for pre and post congress tours, daily tours, sightseeing, social activities, entertainment, shopping etc. Meetings also promote venues for large numbers of people, attract other meetings, create a favorable image for the venue and country and trigger leisure travel for delegates in the long run (Fenich, 2005:18).

The main meeting source markets are industrial countries in Europe and North America. There is significant growth in Southeast Asia, and in the newly developed countries: Brazil, Russia, India, China, South Africa and South Korea. At the top for popular destinations are Singapore, Brussels, Vienna, Paris, Seoul, Barcelona, Berlin, and New York, followed by Tokyo, Madrid, Bangkok, Geneva and Istanbul (Fischer, UIA, 2016a). Venues are influenced by safety and security conditions and there is a tendency to find new venues that are politically and economically safe. Most international meetings convene at metropolitan cities. Demand determinants affect the venue choice of meetings. There are quite a number of determinants that have an effect on attracting international associations, organizations, their regional branches, meeting planners, delegates and attendees to an urban venue. The determinants that are taken into account in nominating a venue are volume of economic activity and industrial development level, developments in services sectors, banking, insurance, and advertising, scientific achievement level, existence of headquarters of international associations, non-governmental organizations, multinational corporations and their branches. Regarding the infrastructure and superstructure of the prospective venue, the availability of congress centers, halls in the city, meeting facilities of academic institutions, and safety at the venue, accommodation quality and capacity at the selected location as well as cultural, historical attractions and tourist products and leisure activities offered are significant. Accessibility to the venue is an important demand creating factor. Modern airports, airline networks, international and domestic links with the city, international and local transportation modes, developed urban infrastructure and how urban space is configured, transportation infrastructure and systems that form a part of the supply capacity play a crucial role in the venue choice process and in attracting meetings to an urban center. As well, travel and tourism superstructure of a potential venue like city hotels with meeting facilities and equipment, quality accommodation within the proximity of meeting centers, halls, facilities, and an efficient local tourism industry are important supply factors that determine whether a city is suited to be a venue or not. In the determination of a city as a venue the role of professional congress organizers, the activities of convention and visitor bureaus, support of national air carrier and public bodies are crucially instrumental. Naturally, unfavorable political and economic conditions affect the prospective venue adversely, whereas a favorable image of the country and the venue contributes to the nomination process of a city to a venue.

Istanbul hosts foreign companies, services sector, universities, academic institutions, and research centers. It is the richest city in Turkey; the center of business, commerce, and trade where more than half of exports and imports are realized. Two international airports serve the city. Air transportation links to Europe and other countries as well as within the country are quite efficient. However, despite an interconnected urban transportation system within the city, there is traffic congestion. Istanbul is also a city of culture, art, leisure and entertainment with a living and vivid urban life. The historical and cultural attractions of Istanbul are valuable assets that comprise a part of the city's past heritage and contemporary urban life. Hence, Istanbul meets most of the meeting planners' venue specific demand determinants with its supply suited for meetings market. The three Venue Districts in Istanbul are Conference Valley with ICEC, Istanbul Convention and Exhibition Center at Harbiye, Haliç Congress Center at Sütlüce and also Feshane Center at Eyüp. The World Trade Center at Yesilköy and Business and Finance District at Maslak also offer facilities for meetings (ICVB, 2016). From the organization point of view, there are expert professional congress organizers, of which a few also work as a destination management company and incentive house in Istanbul.

Venue Choice Determinants for Istanbul

An associations' venue choice process involves a multitude of determinants that influence the decision. The organizational determinants are the scope of the association, location of headquarters, and theme of the meeting. Association meeting planners and senior executives are involved in choosing the venue (Baloğlu and Love, 2005). The site and venue specific determinants affect decisions regarding venue selection. Venue specific demand determinants vary according to the characteristics of associations and delegates. The most important common determinants are existence of meeting facilities, availability of high-quality accommodation, accessibility, and domestic price levels (Chon and Oppermann, 1997).

Other factors from the associations' point of view are service quality, venue image, safety and security, leisure and recreation activities, and availability of shopping opportunities. Delegates' decision to attend meetings is an outcome of personal income level, registration fees, international transportation and accommodation costs. Cost of air transport is influential in the choice of a venue, since as the distance to travel increases, the cost of air transport and concurrently the total cost of attending a meeting increase. Venues within the sphere of the association headquarters are conceived psychologically or cognitively nearby. Tourist attractions, museums, and sightseeing opportunities at the venue are influential determinants in attending a meeting.

There are relationships between the meeting supply that coincides with demand determinants for association planners and meeting delegates. In a competitive meetings market, cities assess their strengths and weaknesses, as well opportunities and threats to be chosen as a venue. It is imperative to assess the relationship between general meeting demand determinants and venue specific determinants of a city. There is a correlation between the meetings supply and demand. Top sectors for international meetings in Istanbul are medicine, information technology and information communication technology, engineering, education and activities of public bodies. In the chart below, demand determinants of associations and delegates are outlined taking into consideration the views of professional congress organizers in Istanbul.[3]

Table 9. Demand Determinants of Associations and Meeting Delegates

Determinants for Turkey	**Determinants for Istanbul**
Economic, scientific development	Economic, scientific development
Geographic location, accessibility	Geographic location, accessibility
Cost of international transportation	Cost of international transportation
Support of national flag carrier	Support of national flag carrier
Safety and security	Safety and security
Image of Turkey as a destination	Image of Istanbul as a venue
Availability of meeting facilities	Availability of meeting facilities
Tourist products of Turkey	Tourist products of the city
Existence of association headquarters	Existence of associations and branches
Quality and quantity of accommodation	Quality and quantity of accommodation

3 Interviews were conducted by ICVB, Istanbul Convention and Visitors' bureau managers and professional congress organizers, who are members of ICCA and ICVB. After the interview, the respondents were asked to answer a questionnaire relating to demand determinants and supply answers for both Turkey and Istanbul taking into account the views of associations and delegates, depending upon their expertise, past experience and observations.

Prices of tourism services	Rates of accommodation
General infrastructure level	Urban infrastructure level
Delegates' preferences	Delegates' choices
Meeting theme	Associations related to meeting
Political and economic stability	Existence of competitive venues
Leisure and recreation opportunities	Leisure and shopping opportunities
Existence of PCOs, DMCs	Existence of PCOs, DMCs

Swot Analysis of Istanbul for Meetings

An environmental analysis is also utilized using the SWOT analysis. The **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats for Istanbul as a meeting destination are explored below.

Strengths

Increase in the number of international meetings,
Geographic location and proximity of Istanbul to Europe,
Air links with European cities and the rest the World
Air links of Istanbul with other cities in the country,
Frequency of flights between Istanbul and Europe,
Two international airports,
Existence of congress halls and meeting facilities,
High quality hotels with meeting halls and support services,
High quality urban infrastructure,
Extensive and integrated public transportation infrastructure,
Istanbul is a world city,
The city houses the regional headquarters of international associations and organizations,
More than 30 universities are located in the city,
The city is a seaport with multicultural characteristics and international appeal,
Diversified culture, leisure, recreation and creative activities,
Houses universities, and scientific and research institutions,
Turkey's main import and export center,
Diversified cultural, heritage and historical attractions,
Rich, daily living, providing active entertainment and social activities,
City economy depends on tertiary sectors that create demand for meetings,
Experienced professional congress organizers are based in Istanbul,

There is a developed travel industry,

Istanbul's destination and venue images are more favorable than other cities in Turkey,

One of the frequently visited urban destinations in Europe,

Recreation, entertainment and shopping opportunities.

Weaknesses

Vehicle and pedestrian congestion,

Crowded public transportation modes,

Limited use of sea transportation modes,

Country and destination images of Turkey are unfavorable,

Turkey is perceived as a Middle Eastern country,

Demand for meetings in Istanbul coincides with leisure tourist demand,

Congress centers, halls and hotels with meeting facilities are distant to tourist attractions,

Meeting facilities are underutilized due to low demand,

Political tension in the region affects Turkey and Istanbul adversely,

Central business district is distant to congress valley,

Low level of development in dynamic sectors of the economy, IT, ICT, etc.,

Scientific development level is low,

Unfavorable relationships with neighbors and EU members,

Except Europe, Istanbul is distant to main meeting generating countries,

Lack of sufficient financing for meetings,

Insufficient support of the national carrier.

Opportunities

There are no competitive venues in the region,

Congress centers and meeting halls are new,

Diversity of social events and pre and post congress tours,

Possibility to enrich tours with cultural tourist products,

Diverse overland pre and post congress tours,

Meetings in Istanbul extend the tourist season,

Istanbul Festivals enrich the leisure activities,

International companies, organizations and associations increase,

The tertiary sector develops,

Two international airports serve the city,

Land transport facilities are developing, Historic attractions are being renovated,

Tourism departments conduct courses on the meeting industry.

Threats

Emerging venues in Southeast Asian and BRICS countries,

The capitals of new members of the European Union are prospective venues,

European capitals are nearer to international associations' headquarters,

Strong competition between venues,

Political and economic instability in the country,

Wars and political instability in the Eastern Mediterranean,

Turkey's relationships with the EU does not prosper,

Negative safety and security perceptions of Turkey,

Unfavorable country image with Islamic connotations,

Conclusions

Istanbul is a developed urban tourism destination within the periphery of Europe. It is the most visited city in the country by foreign visitors with motivations other than a resort holiday. The majority of city hotels are located in Istanbul. The city has three conference districts that are within the reach of hotels, leisure, recreation and shopping opportunities, cultural, historical and heritage assets. The image of Istanbul as an urban center and tourism destination is favorable among foreigners. The city offers a vivid and lively life to all kinds of visitors, international and domestic. Istanbul is a hub with two international airports. Turkish Airlines and privately-owned airlines serve most countries and foreign cities and they connect Istanbul with other Turkish cities. The inner-city transportation network is interconnected through public transportation infrastructure.

Istanbul is the center of national tourism and the travel industry. Experienced professional congress organizers are located in the city. ICVB, Istanbul Convention and Visitors' Bureau, promotes and markets the city to associations. The cooperation of ICVB and Turkish Airlines in promoting the city is essential. Emphasis should be given to comprehensively prepared promotion and marketing efforts and venue promotion by public authorities. There are bottlenecks in city traffic despite integrated transport infrastructure. Professional congress organizers note that there is a fierce competition in the meetings market.

Meeting Promotion Kit for Istanbul

Istanbul in Brief

Introduction and presentation
Geographical location
Europe, Turkey regional map
History and culture
Istanbul in history
Capital of empires
Cultural capital and faith center
Leisure and recreational activities
Festivals, biennials and similar activities
Shopping opportunities, Grand Bazaar, Spice Market
Attractiveness of the city as a venue
Distances from origin markets
International transportation links
Istanbul Airport and Sabiha Gökçen Airport
Airlines and their networks
Support services for meeting organizations

Istanbul as a Meeting Venue

Plan of Congress Valley
Lütfi Kırdar Convention Center
Cemal Reşit Rey Concert Hall
Halic Congress Center
Hotel convention centers
Hotels with meeting facilities on a map
Feshane and Sütlüce Congress Center
General transportation guide for Istanbul

Leisure Activities

Historic Peninsula
Galata Beyoğlu
Bosphorus
Haliç, Golden Horn

Princess Islands with maps and brief explanations.

Legend, important places on maps

Tour Recommendations

Byzantine Capital

Ancient Hippodrome

Milestone

Hagia Sophia Museum

Underground Cistern

Mosaic Museum

Kariye Church Museum

Ottoman Capital

Blue Mosque

Turkish and Islamic Arts Museum

Topkapı Palace Museum

Golden Horn

Fener Region

Gül Mosque

Hagia Nicholas Church

Greek Orthodox Patriarchate

Church of Virgin Mary

Bulgarian Church

Balat Region

Ahrida Synagogue

Balat Houses

Yanbol Synagogue

Stroll in the Balat Market

Galata, Taksim District

Galata Tower

Tunnel, Historic Finucular

Mevlevihane, Convent of the Dervishes

Sightseeing from Tunnel to Galatasaray

Hagia Maria Church

St. Antuan Church

Flower Market

Pera Palas Hotel

Ottoman Palaces

Dolmabahçe Palace Museum

Naval Museum

Malta Pavillion

Asian Istanbul

Üsküdar District and Market

Beylerbeyi Palace Museum

Kuzguncuk

Entertainment

Galata Tower, folk dance shows

Restaurants and entertainment at Kumkapı, Bosphorus, Galata and Taksim

Museums

Locations

Opening hours

Closed days

Closed dates

Festival programs

Particulars of Istanbul

Population

Weather

Currency, time horizon, etc.

Useful Addresses, Website Links

Addresses, Contact Information

ICVB, Istanbul Congress and Convention Bureau

ICEC, Istanbul Congress and Exhibition Center

TÜROB, Touristic Hotelier’s Association
TÜRSAB, Turkish Travel Agencies Association
SITE, Society of Incentive Travel Executives, Turkey Chapter
ICCA, International Congress and Convention Association, Turkey Chapter
Professional Congress Organizers
Information Offices.

Websites

Turkey,
Tourism in Turkey,
Ministry of Culture and Tourism,
Istanbul
Tourism in Istanbul

Culture, Art in Brief

Universities, academic institutions and associations,
Trade offices and associations,
Istanbul Chamber of Commerce
Istanbul Chamber of Industry etc.,

XI Faith Tourism[4]

Tourism and Religion

It took a long time before tourism stepped into its mass-tourism stage, and before an increasing number of sociologists, philosophers and psychologists started analyzing faith tourism. Tourism and leisure time are closely related. When free time became an inevitable part of the modern world, mass tourism appeared as a form of using free, leisure time (Vukonic,1996:16). Tourism enabled direct cultural fulfillment by letting mankind directly learn about the natural, cultural, spiritual, moral and ethical values of other nations and remove prejudices bringing them together. As cultural tourism provides people with spiritual enrichment and self-development of personality, religious tourism is considered as a subdivision of cultural tourism (Vukonic, 1996:92,104).

Psychological motives, especially religious motives, greatly affect the demand for tourism. For pilgrims, it is an obligation to visit the cities Rome, Jerusalem, and Mecca and the shrines in those sites. People rely on hope and all religions have made hope concrete by claiming that a visit to a holy place would relieve their troubles and provide them spiritual well-being. Visits to holy places with the aim of purification, redemption, fulfillment or healing are called pilgrimages. A pilgrimage is an organized visit or journey realized by religious motives and the contents of the location visited include religious tourism attractions and religious festivals and rituals (Nolan and Nolan, 1992:68). Royals, aristocrats and pilgrims from all social classes make pilgrimage visits, except the very poor, who were tied to the land. Pilgrimage was the only excuse to escape from the ordinary life of the village. Starting during the second World War, travelers from England, France and Germany had at their disposal guidebooks, accommodation facility information, travel agencies, souvenirs and almost all the same amenities as modern tourists. By means of this high demand for travel, innkeepers, souvenir manufacturers and churches prospered (Rinschede, 1992:64).

Thousands of sacred buildings are the most tangible connection between tourism and religion. Mostly, the interests for these buildings are due to their cultural content and historical value, rather than their original religious purpose. The buildings that are attractive in faith tourism can be classified as, "religious consents or buildings which are an attractive factor of tourism supply, in which religious tourists fulfill their religious needs directly; churches, mosques, temples and buildings belonging to religious communities and organizations that

4 Modified and updated by Yarcan, Ş. PhD. from Yıldız, Ceren and Ongun, Gülşah. 2003. Religion Diversity of Istanbul as a Destination Marketing and Promotion Tool. Research project submitted to the Tourism Administration Department, Boğaziçi University, Istanbul.

belong to tourist-receiving supply and that are used to provide services to religious tourists; monasteries and convents, seminaries, religious schools" (Vukonic, 1996:62).

Pilgrimage shrines are defined as places that serve for the goals of religiously motivated journeys and visitors. Festivals with religious association, religious structures as attractions as well as for secular tourists, shrines, and sites of religious significance with historic or artistic importance are the main elements of a travel event related to one's faith. In other words, a pilgrimage shrine may or may not be a tourist attraction due to its historical, artistic or architectural properties (Nolan and Nolan, 1992). Faith related travel includes pilgrimage visits to certain holy cities and sites, visits realized to religious shrines, large-scale gatherings on significant religious dates and anniversaries, and visits realized to important religious sites within the framework of a tourist itinerary regardless of the time of the tour. Faith tourism is a niche tourism type whose participants are motivated for religious reasons. The participants of organized faith and pilgrimage tours often plan "a day extra" which allows them to visit markedly tourist attractions. Today, religious tourism is closely connected with holiday and cultural tourism (Rinschede, 1992:52).

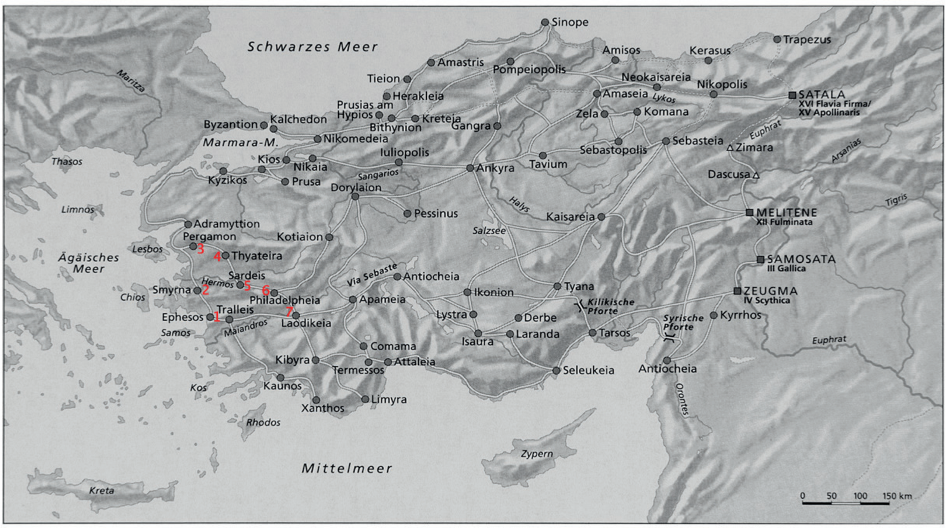
Biblical Events in Anatolia

Religion diversity in Turkey is a part of the cultures that the country has had since ancient times. Asia Minor is an important geography where three monotheistic religions, Judaism, Christianity and Islam developed. There are many important sites of crucial events in the history of those three religions in Asia Minor. Due to Anatolia's geographic location and its long history with many civilizations, these religious sites are significant. Therefore, a journey through the country has for many people the quality of both a physical and spiritual search for the origins and realities of one's faith.

Harran is an important site for Judaism, Christianity and Islam because it was the hometown of Abraham, "the father of many nations and friend of God." Today Harran is a small village with authentic bee-hive shaped houses, a fortress, a temple ruin, and remains of a university (Yücel, 2000; Blake and Edmonds, 1982:41-43). Some remarkable events in the history of Christianity took place in Anatolia. St. John migrated to Ephesus with Virgin Mary and other believers from Palestine. The seven congregations of St. John, addressed as the Seven Churches of Asia Minor in his Book of Revelation in the New Testament, are in Anatolia. A major part of the Bible by St. John the Theologian was written in and sent to or from churches in Asia Minor. St. Paul's three missionary journeys took place in Asia Minor. Due to the missionary journeys of St. Paul, who was a Jewish Roman citizen of Tarsus, major

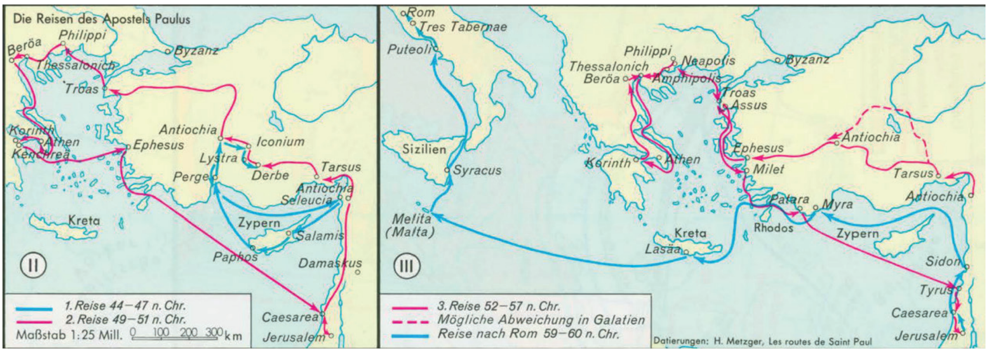
Jewish congregations in Asia Minor converted to Christianity and the new religion developed from its origins in rural Palestine and became an urban Greco-Roman world religion (Ramsay, 1962:70-88). The Church of Antioch, St. Peter's Church, the Seven Churches of Asia Minor, Revelation and the Churches set up by St. Paul are all in Anatolia. St. Peter and St. Paul were martyred during Nero's persecutions. All Seven Ecumenical Christian Unity Councils were held in western Anatolia and Istanbul**.** The Byzantine Emperor was the head of the state and the Ecumenical Patriarchate was not a state. Turkey is important to an understanding of the background and history of the Bible, both the Old and New Testaments (Blake and Edmonds, 1982:9).

St. John, the leader of the Churches of Asia Minor was in exile at Patmos Island. St. John's letters to Seven Churches focus on ethics of religious beliefs and behavior. The order in which the letters were sent to the cities is Ephesus, Smyrna, Pergamum, Thyatira, Sardis, Philadelphia and Laodiceia. The letters written to the Christian congregations, the Seven Churches of Asia Minor, in the Book of Revelation by St. John the Divine are in western Turkey and once in these cities Jews had lived. The Seven Churches represent minor churches too, as the letters were re-sent to nearby cities: Miletus, Troas, Assos, Cyzicus, Magnesia, Tralles, Metropolis, etc. The Seven Churches and cities are on a route a messenger naturally would follow (Ramsay, 1994:25-35).



Roman Road System and the Seven Churches of Asia, I-II cent. A.D. Map Source: after Marek, C. 2010. Geschichte Kleinasiens in der Antike, 468

The origin of the church in Asia Minor goes back to the crucifixion and resurrection of Jesus. At Pentecost, Jews from Cappadocia, Pontus, Phrygia and Pamphylia went to Jerusalem and they witnessed the Holy Spirit and listened to St. Peter's sermon. These believers, on their return formed the first Christian congregations in Asia Minor. The Apostles left the Holy Land after the stoning of St. Stephen. At Antakya, Antioch, the word Christian was first used to refer to the adherents of the new religion. Antakya became the third most powerful city after Jerusalem and Rome. St. Peter is the founder of the Antioch Church and its first Bishop (Blake and Edmonds, 1982:73-75). Antakya Museum holds some mosaics dating to the Roman times on Biblical scenes, mosaics of Noah's ark and animals.



St. Paul's Missionary Journeys. Map Source: Leisering, W. (ed.), 2007. Historischer Weltatlas, 33, detail.

St. Paul, a traveler, was a Roman citizen and a native of Tarsus, Cilicia. Tarsus was the center of intellectual and philosophical development as well as trade. St. Paul, a well-educated disciple, was a talented orator who spoke Greek and Hebrew and visited the main Jewish settlements in Asia Minor (Ramsay,1962:29-39). The Roman cities of Asia Minor were on the trade and military routes which were roads that coincided geographically. There was not a postal system for laymen, but messengers were available. Antakya was the base of St. Paul's missionary activities. St. Paul visited Perge, Antioch at Pisidia, Yalvaç, Iconium, Konya, Tarsus, Assos, Ephesus, Miletus, and Alexandria Troas where early Christian communities emerged (Skeel, 1901:110-139). The ancient street at Tarsus and the remains of the roads connecting the city to the Cilician Gates give an idea about the Tarsus of St. Paul's time. Aya Thekla Bazilika and Alahan Monastery are among the important places to be seen around Binbirkilise at Cilicia.

Cappadocia, known for its interesting landscape and geography is the home of many rock-cut churches and monasteries. The churches at Cappadocia are decorated with paintings and frescoes composed of Biblical themes. For the present-day visitors, the rock churches of Cappadocia have a surrealistic charm. Derinkuyu and Kaymaklı underground cities are underground settlements at Cappadocia where people hid themselves from invaders and escaped from Roman persecution during early Christianity (Vrioni, et al, 1971). Early Church Fathers in Asia Minor established the main rules of Christianity and spread the word to different communities. The Cappadocian Fathers are St. Gregory of Nazianzus, St. Gregory of Nysa and St. Basil of Caesereia who established the rules of Eastern Monasticism (Morrison, 1912:4). St. Basil is the patron saint of the Slavic Church, St. George of Nazianzus is the patron saint of the Church of England. St. Nicholas of Myra on the Mediterranean in Turkey is the patron saint of the Russian Orthodox Church. Orthodox, Catholic and Protestant believers respect these saints. St. Ignatius of Antioch was exiled to and martyred at Rome and St. Polycarp of Smyrna, a disciple of the Apostle John was burned to death.

Prior to the development of Christianity, there was the Temple of Artemis at Ephesus. Artemis Temple attracted pilgrims to Ephesus. Artemis Temple was one of the Seven Wonders of the World. The House of the Virgin Mary, the Double Church, and the Church of St. John the Divine are the most important surviving sites and monuments at Ephesus, in the town of Selçuk. The House of the Virgin Mary is the residence that is believed to be the place where she lived. Since its discovery, the Virgin Mary's House has been attributed with a variety of cures for hopeless patients by the use of spring water beneath her house. According to Christian tradition, during the last years of his life, St. John the Theologian and Gospel writer lived at the hill of Ayasuluk and was buried there. By the 6th century, a church was built above his tomb by Justinian the Great. The Church of St. John was the largest project undertaken outside the Byzantine capital Constantinople (Scherrer, 2000). The Church of St. Polycarp is in İzmir, Smyrna. Smyrna is one of the Seven Churches of Asia Minor mentioned in the Book of Revelation.

The Ecumenical Councils are important in the church history as the new religion and belief were defined and a formal church-state was initiated. The Councils also pointed out the differences between Eastern Orthodox and Western Catholic church practices. The first Ecumenical Council was in Constantine's Palace in Nicea, Iznik, 325 AD. The second Ecumenical Council was in Hagia Irene Church in Constantinople, Istanbul, 381 AD. The third Ecumenical Council was in Double Church in Ephesus, 431 AD. The fourth Ecumenical Council was in Hagia Euphemia Church in Chalcedon, Kadıköy, 451 AD. The fifth Ecumenical Council was in Hagia Sophia Church in Constantinople, 553 AD. The sixth Ecumenical Council was in Hagia Sophia Church in Constantinople, 680-681 AD. The seventh Ecumenical Council was in Hagia Sophia Church in Nicea, Iznik. 787 AD. (Chryssavgis, 2014:122).

Besides the Greek Orthodox Church and the other Eastern Orthodox churches, such as Armenian, Syrian, and Chaldean churches, there are three major Christian traditions represented in Turkey. These are the Latin or Catholic Church that traces its roots to the Crusaders, who were early merchants and sailors, the Eastern Rite Catholic Church, who broke with the Orthodox Church and joined Rome, and the Protestant Churches.

Religious Sites in Istanbul

People of different backgrounds, both by religion, culture and social background, resided together in various quarters of main cities during the Ottoman Empire. Each major neighborhood of Istanbul has a wide array of ethno-religious heritage. The respect and affection of the neighborhood residents for each other resulted in mutual participation in various religious and social functions. Since the Ottoman conquest of Constantinople, non-Muslims played an important role in the economic, social, cultural and political life of the Empire and Istanbul. Armenians, Jews, and Greeks constituted the majority of the non-Muslim groups in the Empire. In Istanbul, the Moslem districts were around the imperial mosques, while the Jewish and Christian districts were on the Golden Horn and the Latins settled in the Galata district.

Jewish Sites: The number of Jews in Anatolia in relation to the total population has never been great, but the community played an important role in the commercial and intellectual life of Asia Minor. After the First and until the Second World War, the total population of Jews in Turkey was around 120,000 (Halperin, 1986:15). After the destruction of the Temple in Jerusalem in 670 BC, many Jews moved to Asia Minor. The current Jewish population of Turkey primarily dates back to the time of the Inquisition in 1492, when Spanish and Portuguese Sephardim Jews, migrated to the Ottoman Empire (Juhasz, 1990). There are a number of Jewish communities in Istanbul. The Sephardic Jews, who migrated from Spain and Portugal during the Inquisition, the Ashkenazi, who migrated from Europe and Crimea, the Karaites, who reject the Talmud and migrated from Crimea and Alexandria, the Romaniot, whose residence traces back to Roman times, and the Italian Jews, from Italy, whose origins are linked with the Levantines, who were Europeans who lived in the Levant, in the East, are the main groups of Jews in Turkey (Karmi, 1992:23-31).

Jews lived almost in every city in Anatolia and therefore, there were synagogues in almost every city. There was a Jewish colony living in Sardis and the reconstructed synagogue of Sardis, in Sart, is one of the oldest synagogues in Asia Minor, (Blake and Edmonds, 1982:29). Christianity was born as a movement within Judaism. St. Paul during his missionary journeys delivered most of his speeches in the synagogues and converted many Jews to Christianity. According to Jewish customs, a person was free to speak in a synagogue. Presently, there are active synagogues at Istanbul, Izmir, Adana, Ankara, Antalya, Bursa, Çanakkale, Iskenderun, Edirne and Kırklareli (Halperin, 1986:32-40).

Due to the migrations from Spain and Portugal, the Jewish population in Istanbul increased drastically in the 16th century. These people participated in education, manufacturing, trade, medical sciences, politics of the Ottoman Empire and the Ottoman army by the efforts of the third Selim during the 18th century. Between the 15th and 17th centuries, the Balat, Hasköy, and Kuzguncuk neigbourhoods were predominantly Jewish. During the 19th century, a shift to the Galata district was observed. Jak Deleon expresses the lost magic of Balat as, "Once upon a time there were Golden Horn and Balat, but today there are only people who write the old Golden Horn and Balat" (Deleon, 1991). During the second half of the 19th century, a new Jewish-Italian Congregation was established. During the same century, the majority of old synagogues were restored by the contributions of the Kamondo Family, and other elite Jewish families and philanthropic associations. Currently, 18 of the synagogues are active. Turkish Jews are scattered around new districts of Istanbul.

There are quite a number of synagogues in the Galata District. Neve Şalom Synagogue, which means oasis of peace, is a new shrine and it is the biggest synagogue that serves wedding, funeral and circumcision ceremonies. The Jewish Museum is also housed within Neve Şalom Synagogue. Ashkenazi Synagogue is well known with its unique architecture. The Italian Synagogue has been serving the Jewish society for over a century. Zülfaris Synagogue was an important shrine for the Jewish community. At Balat, where at one stage many Jews lived, Ahrida Synagogue was named after the Macedonian city of Ohrid, which means rose. Ahrida is the oldest and most beautiful synagogue of Istanbul. According to tradition, it was built by Romaniot Jews in the 15th century. Yanbol and Ahrida are the only active synagogues in Balat (Güleryüz, 1992:13-20, 67-88)

Islamic Sites; Konya is important for Christians and Moslems. Mevlana Celaleddin Rumi, who was a mystic, poet, and humanistic philosopher, lived here in the 13th century. Konya is a religious center because of Mevlana and Mevlevi Dervishes. The tekke, a religious meeting place, is the main focus of the city. St. Paul preached at Konya, Iconium, on his first missionary journey. The Eyüp District in Istanbul is named after Eyüp el Ensari, the companion of the Prophet Muhammad and his standard bearer. Eyüp Sultan died during the Arab siege of Istanbul in the seventh century. His tomb is in now adored and visited as a major Islamic pilgrimage center. Eyüp is the third most important religious shrine in Islam, after

Mecca and Jerusalem. Eyüp Mosque and its surrounding houses of the imperial complex of buildings include soup kitchens, mausoleums of sultans, hospices, fountains, baths, medreses, and theology schools. Topkapı Palace Museum houses the Holy Relics of Islam.

Greek Orthodox Sites: Hagia Irene Church, the Church of Divine Peace, located in the first garden of Topkapı Palace Museum, is important in Christian history. The Second Ecumenical Council was held at Hagia Irene Church. Hagia Irene Church was never converted into a mosque. Currently it is a museum and concert hall. Hagia Sophia Museum is a sacred monument, both for Christians and Muslims. Hagia Sophia means Divine Wisdom or Divine Knowledge. Hagia Sophia Church was first converted into a Friday Mosque and then converted into museum by Atatürk. Its aesthetics, size, antiquity and history have challenged architects, theologians, historians and artists to study and admire it. The Church of St. Sergius and St. Bacchus Küçük Ayasofya Mosque, which was built by Justinian's order, is another important Christian site with an interesting architecture. The Church of St. Savior in Chora, now the Kariye Museum, is located very close to the city walls at Edirnekapı and was a part of a monastic complex. It is famous for its mosaics and fresco decoration. The Church of Virgin Pammakoristos, Fethiye Mosque was once the Greek Orthodox Patriarchal Church. The church contains mosaics with high artistic value. The Church of Virgin Mary, St. Mary of the Mongols in the Fener region has never been converted into a mosque. The church of the Greek Orthodox Patriarchate at Fener is St. George Church. It houses relics that have been treasured for centuries (Chryssavgis, 2014:34-39, 120-121).

Until the First World War, millions of Greeks were living in Anatolia. After the war, Turkey and Greece decided to exchange their minority populations. Turks living in Greece migrated to Turkey and Greeks living in Anatolia moved to Greece. The Greek Orthodox Patriarchate was founded in the 4th century and is the highest holy center of the Eastern Orthodox Church. Following the separation of the Orthodox East and Catholic West churches (1054), the See, Bishopship of Constantinople became the first among equals in the hierarchy of the Eastern churches; the Patriarchate has primacy among the Orthodox Churches. The Patriarch is the leader of the Ecumenical movement, participating in the World Council of Churches (Chryssavgis, 2009:71-76). **The** Church of St. Stephen, located on the Golden Horn, belongs to the Bulgarian Orthodox community and is made entirely of cast iron.

Armenian Orthodox Sites: Armenians are one of the earliest Christian communities in Anatolia. They are the largest Christian community in Turkey among other Christian communities. Most of them live in Istanbul. Istanbul is perhaps the most suitable place to preserve their cultural and ethnical identity. During the reign of Sultan Mehmet II, they were given the rights to establish their own religious, educational, and cultural institutions and they preserve their rights today. The community has cultural associations, schools, hospitals and newspapers. The Armenian Patriarchate at Kumkapı with its church Surp Astvadzadzin, the Holy Mother of God, governs 33 churches including the ones in Cyprus, Egypt, Bagdat, Bulgaria, Romania and Greece. Each new patriarch of Coptic Orthodox and Syrian Orthodox Church is enthroned at the Armenian Patriarchate. The Church of Surp Kevork, Sulu Manastır Church at Samatya and the Church of Surp Hresdagabet at Balat are the main historic shrines.

There are over a hundred churches, Catholic, Orthodox, Protestant, serving many different communities and active congregations in Istanbul.

Conclusions

Istanbul has very diversified religious assets suited for faith tourism and faith travelers. Istanbul is not sold as an independent destination but usually combined with other faith tours designed for neighboring countries such as Egypt, Greece and Israel. Political conflicts in Turkey and in the Eastern Mediterranean affect demand adversely. Faith tours usually start from Istanbul and visitors visit places that are in foreign tour operators' brochures. Faith travelers are not well informed about the variety of religious heritage Istanbul embraces. Therefore, the potential of Istanbul as a faith tourism location is not fully utilized.

Repeat business is found to be very low as the products are standard and new itineraries are hard to sell. There is strong competition in the market. Inbound tour operators find it difficult to promote alternative tours since promotion costs are very high. Existing marketing and promotion tools are not adequate for the creation of a brand image of Istanbul as a faith tourism center. Local tour operators organize familiarization trips for religious authorities and foreign tour operators. For some sites, permission should be taken for a visit which hinders travel firms to include only a few sites within the itineraries. Consequently, current tours include the main sites and museums only. Faith tours are not offered to the market as a completely separate entity, but rather, they are combined with other historical sites and tourist attractions.

Standardization, sale of the same or similar religious tours and itineraries is due to high costs of creating new faith tour products. Entrance fees, the efforts to make new products known by foreign tour operators and risks involved in whether the tourists would demand to see the new sites or not, are cost factors that demotivate travel firms from constructing new tour contents. Priests give importance to certain religious sites more than others. The same is true for the creation of demand by foreign tour operators that include certain sites in their tours, so the demand is influenced by their sales and marketing efforts. These two preceding factors are exacerbated by the incompetency of inbound tour operators, expressed in inadequate promotion efforts. Faith tour contents are limited to traditional cultural tours. The focus is on selling the standard products. New faith tours should be made available to churches and other foreign partners.

There are vitally important aspects to be taken into consideration. Effective cooperation is essential between different partners. Suggesting innovative products, providing them with travel guides, films, and brochures, and giving seminars to potential buyers are useful ways of generating interest in religious tours. Sites should contain an element of community use. The aim is to give local people a reason to visit the site. This also represents a considerable commitment to the community.

Advertisement campaigns should focus on customers and the travel trade. Primary target market segment advertisements should take place in magazines related with religion. Public relations activities should be carried out in terms of event organizations, press trips, and familiarization trips. Promotions should create realistic expectations and there is a responsibility to inform possible visitors about the value of the faith heritage of Istanbul. Istanbul's attractiveness as a faith tourism center can be enhanced by such measures. Local tour operators can use better-designed and more comprehensive communication tools with the clients through brochures, interactive websites, online news and newsletters. Tour operators need to design comprehensive, attractive and user-friendly websites. Multimedia information systems enable museums and heritage sites to re-design and create new products. By using multimedia and websites, possible visitors can experience religious sites prior to making a destination choice and the actual visit. Such information through multimedia can create a niche supply and also demand.

The authenticity of the current products is to be maintained avoiding excessive number of visitors. Exclusiveness should be created to meet the customer expectations concerning uniqueness. Tourists should be informed about the different cultures and heritage sites in Istanbul. Achieving diversity in faith tourist products should be aimed at increasing the number of repeat visitors by developing areas such as Kuzguncuk, Fener, and Balat in terms of employment, income and social life without damaging their charm. Hence, the product mix for Istanbul can be broadened ensuring a longer stay and product life cycle. Providing means to the residents increases consciousness of faith heritage and working with local communities ensures that benefits accrue to the native residents.

Proposed Faith Tours for Istanbul

Jewish Heritage

Ortaköy

Visit Etz Hayim Synagogue
Visit Ortaköy Old Jewish Residences
Stroll at Ortaköy seaside and visit Mecidiye Mosque
Proceed to Ulus Jewish Cemetery

Galata - Pera

Visit Neve Shalom Synagogue and
Jewish Heritage Museum within the synagogue
Stroll around Galata Tower
Visit Schneider Temple Art Center
See the House of Avraham Kamondo and Kamondo Stairs

Ottoman Heritage

Eyüp

Visit the Mosque of Eyüp El Ensari
See the important mausoleums of the Ottoman sultans and dignitaries
Visit the Mihrimah Sultan Hospice
Proceed to Pierre Loti Lodge and coffee house for a break

Architect Sinan

Visit Sokullu Mehmet Pacha Mosque
Stroll through the old quarters and Old Book Market
Visit Süleymaniye Mosque and Complex
Walk down to Tahtakale and visit Rüstem Pacha Mosque

Byzantine Heritage

Old City

Visit St. Sergios and Bacchus Church, Küçük Ayasofya Camisi
Walk around the seaside near Marmara to see the remains of Boucaleon Palace
Proceed to the Seven Towers
Visit the Church of Chora

Golden Horn

Visit the church of the Greek Orthodox Patriarchate
See the rich old Greek houses at Fener
Visit the Church of Mouhliotissa, Church of the Virgin Mary
Visit the Women's Library and Information Center

Armenian Heritage

Visit the Armenian Patriarchate at Kumkapı, Surp Astvadzadzin Church and Church of Surp Kevork at Samatya, Sulu Manastır, the former Patriarchal Church

Visit the Church of Surp Hresdagabet at Balat

XII Culture, Tourism and Business in Istanbul[5]

Istanbul is a well-known established urban tourism destination that needs to be analyzed from the point of view of culture, tourism and business. Various elements in the development of a city are interrelated such as tourism that influences and is influenced by commercial and cultural activities. Cities are increasingly competing with one another and marketing themselves to attract tourists, investors, and residents. In order to promote themselves, these urban spaces need to consider several elements, including their urban fabric and infrastructure, tourism and historical attractions, living culture and arts, and commercial and creative industries. These elements interrelate with each other and contribute to the overall development of the city. For example, the commercial development of a town stimulates high income, which creates extra demand for recreation, entertainment, culture, shopping, lodging and conference facilities (Ergün and Dündar, 2004), as well as recreational and cultural tourism and heritage. In turn, tourism also contributes to the urban economy, and benefits the city by promoting the preservation of cultural heritage, encouraging beautification and enhancement of the infrastructure, endorsing urban planning and integrated management, and enhancing the recognition of the city's people and values (Paskaleva-Shapira, 2005).

Leading world cities have been discussed and analyzed in the literature, and they have been described with many different terms, including world cities, mega-cities, global cities, primate cities (Beaverstock,1999), and metropolitan cities among others. However, most of these studies have focused on a specific aspect, such as urban planning, cultural development or the image of the city. There is a lack of research from the perspective of tourism as influencing and being influenced by commercial and cultural activities, as few studies have taken a broader perspective to analyze the interaction of various factors and elements to create a city of world status. Great cities of the world are usually characterized as centers of capitalist economic organizations, and locations for the production of services (Keyder and Öncü, 1993). Together with the production, distribution and marketing of goods, the global city status (Sassen, 1991), requires communication and transportation networks, accommodation units, as well as banks and financial institutions. Such an environment often attracts multinational firms and their branch offices to the global city. Therefore, the existence of five-star hotels, foreign hotel chains, conference facilities, international airports and international airlines serving the city, together with foreign banks and financial institutions,

5 Alvarez, M. D. and Yarcan, Ş. 2009. Culture, Tourism and Business in Istanbul: The Case of a World City. 03-05 April 2009, 4th International Scientific Conference; Contemporary Developments in Tourism, Travel and Hospitality, The University of the Aegean, Rhodes Island, Greece. Paper submitted was published at proceedings in USB format. Permission has been taken to republish the paper in a revised format in this work.

and retail outlets and shopping centers, are all criteria that indicate the status of a city as global. A discussion on these indicators with reference to Istanbul is instrumental in order to determine whether this city merits the classification of a world city (Friedmann, 1986). Furthermore, the interrelationships of various elements in the development of Istanbul are considered in a historical and evolutionary context.

Istanbul represents an interesting case study to analyze the influence and interrelationships of tourism, cultural activities and commercial industries in the development of a world city, with the opportunity to draw lessons for other developing cities. Istanbul has enjoyed significant historical importance, both from a cultural, economic and commercial point of view, and is currently the socio-economic, cultural and economic capital of Turkey. Moreover, it is also a very important tourism destination, not only in Turkey but also in Europe. This city is also the first point of contact of Turkey with western values and their adaptation (Ayataç, 2007). Istanbul has been recognized as a cultural center by the European Union and was one of the European Capital of Culture cities in 2010. Moreover, in recent years, the number and variety of hotels, shopping malls, recreation facilities, restaurants, and museums in Istanbul have considerably increased helping the tourism infrastructure and superstructure. These changes have not only created a demand for domestic tourism and foreign tourism in the city, but they have also increased the demand for services from Istanbulites. Therefore, the case of Istanbul provides an invaluable opportunity to analyze the evolution of a city to achieve world-class status, and become an important tourism destination. Hence, the factors that have led to the recent development of Istanbul as a global city, a cultural capital and a popular tourism destination should be described and relationships between these different but complementing factors should be analyzed.

From Constantinople to Istanbul

Historic Constantinople was formed by a triangular peninsula surrounded by the Golden Horn and the Marmara Sea. Constantinople was founded by Constantine the Great as the New Rome and new capital of the Roman Empire. The original Greek city of Byzantium was founded in the 7th century BC, although recent excavations at Portus Theodosiacus / Yenikapi district reveal that its history goes back to the early Neolithic period (Kocabaş, 2008). Constantine converted Byzantium into New Rome and extended its borders to the West, nominating it as the Christian capital of the Roman Empire (Krautheimer, 1983). Constantinople was connected with Rome through a military route called Via Egnatia. Constantine's successors devoted effort to strengthen the city's infrastructure. Its backbone was a street called Mese, used for ceremonial purposes and which corresponded to the

Divan Street of the Ottoman era (Mango, 1996). An essential part of the infrastructure of the city included the ports along the Marmara Sea and the Golden Horn, used to ship food to Constantinople (Müller-Wiener, 1998). A new era was started by Theodosius I, who expanded the city with land walls during the 5th century, that are still visible today. During the reign of Justinian in the 6th century, Hagia Sophia, Hagia Irene and Sergius and Bacchus churches, all still standing, were built, together with a number of big cisterns. "Between the 10th and 12th centuries Constantinople was still a great city, the biggest of Europe" (Mango, 1997:22). The Roman forums situated along the main routes were market places. The city had ports, public baths, fountains, a hippodrome, a theatre for entertainment, palaces and monasteries within the urban spaces. More than its wealth, affluence and cosmopolitan character, it was the sacredness of Constantinople that raised its status as a city of the Christians (Mango, 1996). Moreover, it was a city dedicated to the Virgin Mary.

Constantinople was conquered by the Ottomans in 1453. Its name was not officially changed to Istanbul until 1923 (Çelik, 1986), as the Ottoman sultans assumed the Byzantium heritage declaring themselves the successors of the Roman emperors. "The geographical situation of the two Empires, (Roman and Ottoman), also exhibits remarkable similarities" (Yerasimos, 1997:25). Istanbul stayed as the center of the main road network during the Ottoman era, with an increasing importance of the harbors. Islamic Istanbul followed the same pattern of city development as in the Byzantine time. The new districts of the city were established around the mosques, where socio-economic complexes were built. These institutions constitute the basis of Ottoman urbanism, with hospitals, fountains, baths, caravansaries, theology schools, and other structures to support the community intellectually and commercially. The conqueror of the city, Sultan Mehmet the II, immediately restored the city walls and the Roman aqueducts and systematically rebuilt the city, which was repopulated with Christian, Jewish and Moslem communities. Districts were formed around these religious communities. Constantinople was slowly converted into an Islamic city. The Hagia Sophia Church was transformed into the Friday Mosque, while most of the other churches were also converted into mosques at later stages.

The nucleus of the present Grand Bazaar was built immediately after the conquest. The Bazaar was considered as the core of a commercial and industrial zone of the city (İnalcık, 1996). Mehmet the II constructed a palace on the upper hills of the Golden Horn and also started the construction of the Topkapı Palace at the tip of the historic peninsula, the former Roman acropolis. Porto Keras, the Golden Horn, was an important port for business and trade (Yerasimos, 1997; Müller-Wiener, 1998). The ancient Hippodrome region was settled by government officials because of its proximity to Topkapı Palace. The city outskirts were confined for military settlements. The city had Islamic districts around the imperial mosques, while the Jewish and Christian settlements were on the Golden Horn and the Latin settlements were in the Galata region.

Istanbul from Early Days of the Republic to Present

Istanbul remained the most important city of Turkey until 1924, when through the proclamation of Ankara as the capital, Istanbul was intentionally neglected by the central government. Istanbul lost its former significance as the metropolitan city of Turkey, as a center of international trade and commerce, and as a focus of production and cultural life (Keyder and Öncü, 1993; Tokatlı and Boyacı, 1999; Geniş, 2004). Some of the neighborhoods of Istanbul, which were once lively and culturally rich, began to decline. After losing its position as a capital, Istanbul underwent a period of stagnation (ICC, 1997), and the urban texture of the city deteriorated as a consequence of the rapid population increase. This growth in inhabitants created infrastructure problems, such as the deficiency in roads, traffic congestion, inefficient garbage collection and inadequate sewage systems. Istanbul has grown from a population of approximately one million in the early years of the 1960’s to a highly populated city.

The military government and the subsequent civilian government applied an economic and political regime to restructure the economy in Turkey and integrate it to the World economy. In this process, Istanbul gained importance as a trade, economy, finance and international urban center. State funding was provided to the city for large-scale urban projects and the financial resources of metropolitan municipalities were increased (Keyder and Öncü, 1993; Uzun, 2007). Through economic transformation, exports increased and Istanbul became the main export and import port. Thus, the role of the city as an economic center was revitalized.

The transformation of the Turkish economy was absorbed by Istanbul and this was reflected in the city’s spatial and social change (Keyder and Öncü, 1993). The rapid development both in industry and commerce led to a change in the physical structure and cultural identity of the city. Office towers housing multinationals, international banks, world trade centers, shopping malls and luxury hotel buildings suggest the integration of almost every major metropolis into global capitalism (Öncü and Weyland, 1997; Keyder, 1999). Such developments in Istanbul were symbolized by sky-scrapers, shopping malls, headquarters of holding companies and banks as well as five and four-star hotels catering for an international clientele, the domestic tourism elites and the rich Istanbulites. Considerable state funds were allocated to Istanbul Municipality and large-scale projects were launched, designed to enhance the city’s global image, to encourage both domestic and foreign investments and to initiate the development of the private sector (Tokatlı and Boyacı, 1999; Keyder and Öncü, 1993; Uzun, 2007). There has also been a gradual transformation of Istanbul from an industrial city to a global city, where the service sectors are dominant (Ergün and Dündar, 2004).

The historic peninsula surrounded by the Golden Horn, the Bosphorus, the Sea of Marmara and the old Byzantine City Walls is an important tourist site. An economic, functional and social transformation took place in the historic peninsula due to the removal of manufacturing districts, factories and workshops in the mid 1980s. Thus, this peninsula became the core for tourism establishments, such as hotels, travel firms, restaurants, cafes, boutiques and entertainment establishments. A similar development has also been observed in the Galata and Taksim Districts (Ergün and Dündar, 2004), as well as at some locations on the Bosphorus.

In the 1990s, Istanbul showed a shift of power from traditional, small traders to large domestic and foreign corporations (Tokatlı and Boyacı, 1999). The spatial expression of this transformation is seen in the skyline of Istanbul on the European side, on the northern axis of the Bosphorus and along the new highways connected to the Bosphorus bridges. A new central business district was formed in this axis, reflecting an increase in international businesses in Istanbul. A distinguishing feature of the commercial structure of the city is the dominant position occupied by large holding companies. These corporations constitute the largest capital groups and they control production and trading of goods and services located in Istanbul. Consequently, it can be concluded that Istanbul plays a major role in the integration of the Turkish economy into the western capitalist economies and markets.

Istanbul as a World Class City and Tourist Destination

Istanbul is the largest city in Turkey in terms of both economic development and population. Istanbul is near to the main international markets and it holds an important role in the exports and imports of Turkey. It is also part of the World's economic system. As the Turkish economy became more integrated into the world economy, the role of Istanbul in the Turkish economy increased. By the 1980s, Istanbul started to take its place as a World city. The local municipal government became much more independent of the central government. This was partly due to its increasing revenues, which resulted in a greater autonomy, leading to large investments being made, particularly in infrastructure. Istanbul also started to attract more industries and services as export-oriented growth policies were adopted in the country (Geniş, 2004; Keyder and Öncü, 1993).

Istanbul has become the largest financial center in Turkey, including the greatest number of service industries in the country. Its Marmara region has also become the largest manufacturing zone. Istanbul has also attracted most of the foreign direct investments in the country. Furthermore, the share of the communications sector in the total direct investments, the share of the financial sector and banks within the total foreign direct investments increased in the Turkish economy. These investments are concentrated in Istanbul. Multinational company headquarters and other businesses such as law, administration, consulting, banking and other financial services that require direct contact and intense front office activities have mainly settled in the new business districts and city center (Berköz and Eyuboğlu, 2007). Moreover, since the 1980s, the retail industry had developed considerably, with Istanbul as its center.

In the 1980s, structural adjustment policies emphasizing the role of foreign capital in terms of exports were implemented, increasing the quantity of foreign direct investments in Turkey (Berköz, 2001). The majority of foreign direct investments in the manufacturing and the service sector are in Istanbul. However, the share of foreign investments in the manufacturing sector is decreasing, while it is increasing for the service sector (Berköz, 2001). These service sectors favored by foreign investors include tourism, banking, finance, insurance, advertising, public relations, telecommunications and information technology.

Istanbul is the cultural and intellectual capital of Turkey and a popular tourist destination for foreign and domestic tourists. The attractiveness of an urban destination depends more on the variety it has to offer than on any individual component (Garín-Muñoz, 2004). It has been stated that internal and external attributes are the factors for the success of an urban tourism destination (Garín-Muñoz, 2004). The internal attributes of Istanbul are mainly its rich cultural resources, heritage sites and museums, as well as competitive tourist products offered and the accessibility of the city from Europe and other continents. The external factors that affect tourism demand to Istanbul are the image of Istanbul as a destination and the perception of Istanbul held by potential foreign visitors.

Istanbul is the culture capital of Turkey and it is the largest city in Europe. It possesses very rich cultural resources and historical heritage sites. As it has been noted earlier, Istanbul was the capital of the Eastern Roman Empire and Ottoman Empire successively. Hence, it offers Roman and Christian heritage to visitors, including the Hagia Sophia Museum, the Kariye (Chora) Museum, the Byzantine City Walls, remnants of ancient palaces and the Roman legacy. In the same vein, the city offers Ottoman and Islamic heritage, including the Topkapı Palace Museum, the Blue Mosque, a number of other mosques, 19th century European style

Ottoman palaces, and bazaars such as the Spice Market and the Grand Bazaar. Within the confines of the historic peninsula of the city, most of the sites, museums, historical monuments and other attractions are within walking distance and accessible on foot.

An important supply factor for the development of tourism in Istanbul is its accessibility. Istanbul is the prime communications link of Turkey with the European cities and other tourist generating centers through its extensive international transportation networks, mainly air transport. Istanbul Airport on the European Istanbul connects with most of the major cities of the World, mostly through scheduled airlines and low-cost airlines. On the other hand, Sabiha Gökçen Airport on the Asian side of Istanbul connects the city with European cities and nearby countries predominantly through low-cost, charter airlines and net-work airlines. Istanbul is also well connected not only to many international destinations but also to all the major cities in Turkey through the flag carrier Turkish Airlines and other privately-owned air carriers. Privately owned low-cost airlines contribute to the interconnectivity of the city to Europe and other nearby countries. Thus, Istanbul in the region has been transformed to a main hub, and has no competitor. The harbor of the city is an important port of call for the main international cruise lines. Also, it is a turn-around port for the cruise ships, extending the length of stay of the passengers in the city. Thus, one of the attractiveness of Istanbul as a tourist destination is its internal and international transportation links, with emphasis on airline connections.

Within the city, infrastructure and superstructure have developed considerably within the last few years. Transportation in Istanbul has recently been extended to include a subway system and tramline. Despite traffic congestion on the main routes during rush hours, tourists are able to use the local public transportation system to move between attractions and to reach the airports. The city has also good and ample accommodation facilities.

One of the external factors that affect the demand to a destination is its image and perceptions (Baloğlu and McCleary, 1999; Chon, 1990; Sönmez and Sırakaya, 2002), including the image of the city (Choi et al., 1999; Luque-Martínez et al., 2007). In the tourism market, the image of Istanbul as an urban culture destination is different than the image of Turkey as a leisure or resort holiday destination. Istanbul is perceived as an old but modern cosmopolitan city, culturally rich, vibrant, exotic, mysterious and beautiful, although also crowded, busy and dirty (Dülger et al., 2005). Positive destination images create awareness for a destination and help the destination to be competitive (Sönmez and Sırakaya, 2002).

Another external factor that affects destination choice is the level of knowledge, familiarity and awareness about the place (Baloğlu, 2001; Hu and Ritchie, 1993). The level of awareness about a destination increases as the destination is nearer to the tourist generating markets. However, Istanbul is not a very near destination to European countries in comparison to other popular European cities, and Turkey as a whole suffers from limited tourist knowledge (Sönmez and Sırakaya, 2002). Increased awareness can also be achieved through unique functional attributes of a destination such as icons, landmarks and special events (Jenkins, 1999). Although desirable, creating a landmark to convey a positive image and increasing awareness for an urban destination is not an easy task. As such, Istanbul lacks an identifiable landmark or a city signifier and therefore cannot easily compete with cities such as Paris or London that have identifiable landmarks. It is possible to remark that not all of the foreign visitors to Istanbul are either cultural tourists or typical leisure tourists. The data indicates an increase in the number of short-break holidays, weekend packages, short escape trips and prolonged stopovers en route to other destinations. Furthermore, the low average length of stay in Istanbul could be partly explained by the increasing number of foreign business travelers who prefer short stays as well as expatriates living in the city.

The majority of foreign visitors come to Istanbul from European countries, and from the eastern neighboring countries. The visits of the neighboring country citizens are not purely for tourism purposes, but also for reasons such as business, trade, shopping and employment. Some foreign visitors in the city are refugees. The share of Istanbul in the total inbound tourism demand is quite considerable, indicating its importance as an urban destination directly affecting the foreign tourism demand profile of the country. The inbound international tourism demand in Istanbul is less seasonal than that of Antalya and other resort destinations, as expected. The demand of cultural, leisure tourists and business travelers are not directly affected by climate or weather conditions. The low level of seasonality also indicates the existence of short-break leisure holidays, weekend escape trips throughout the year, corporate travel demand, as well as the existence of meetings and incentive market demand during the slack months.

Istanbul as Capital of Culture

Istanbul has been a culturally vibrant city since antiquity, in part due to its role as the capital of the Byzantine and Ottoman empires. Other than the cultural remains and attractions that make the city so attractive to cultural tourists, it is also characterized by a rich mix of various cultures and religions. During its history, the city has been the capital of different world religions: pagan beliefs, Christianity and Islam. As the capital of the Ottoman Empire, the city was multi-ethnic, multi-religious, and multi-cultural. During the long years of Ottoman rule, minority non-Muslim groups were classified under the Millet citizenship status and occupied an important place in the urban fabric and culture of the city. The pluralistic character of Istanbul was reflected in its population mix, which at the beginning of the 20th century was composed of Jews, Armenians, Greeks, Levantines, other Christian groups and European foreigners who constituted 57 % of its population (Toprak, 1993). Istanbul as a cosmopolitan city is the location of Western culture and values in Turkey and was always a European city with large numbers of Europeans, Levantines and Europeanized minority groups who had connections and trade relationships with the West (Mills, 2005). This cosmopolitan port city has transformed into a metropolis with a Western character.

In recent years, a revival of minority history in Istanbul has also begun to reshape the city through narrative and recovery of minority identity (Mills, 2005). However, some of the historical urban identities in the Istanbul neighborhoods are synthetic and invented re-constructions. Restoration of the historical settings of Istanbul and gentrification in some old quarters such as Fener, Balat, Galata, Pera, Ortaköy and Kuzguncuk (Ergün, 2004; Behar and İslam, 2006), as well as restored, reconstructed wooden houses on the Bosphorus, are physically changing the image of Istanbul.

The Westernized and European character of Istanbul has been the focus of its successful bid for and selection as a Cultural Capital of Europe in 2010. The European culture capital event was initiated by the European Community in 1985, with the aim of bringing together member states through the expression of common and diverse cultural elements (European Commission, 1985, cited in Richards and Wilson, 2004). Through this event, expanded to include non-member states, Istanbul positions itself as a European city and improves its competitiveness through increased awareness of its cultural assets. In this sense, the European Capital of Culture event can also be considered as an ideal way to display the artistic and cultural assets of the city and to associate the name of Istanbul with cultural richness. Thus, already existing international cultural events, such as the International Film Festival, International Jazz Festival, the Biennale of contemporary arts, among others, are made more visible, while new artistic and cultural organizations are created. These international events link the city to global artistic networks, and they have been instrumental in providing a "cultural capital/world city status to Istanbul" (Yardımcı, 2007:9).

Conclusions

From an evolutionary perspective, the development of Istanbul is associated with mainly three different areas: commercial, touristic and cultural. The city is an important urban tourism destination, with a focus on cultural tourism, urban tourism, business, corporate travel and meetings that significantly reduce the impact of seasonality in tourism. The image of the city as European and cosmopolitan is promoted and efforts are made to portray its historical attractions and cultural and artistic events. Public authorities in Turkey are consciously working towards positioning Istanbul as a World class city, and as a hub for finance, logistics, culture, tourism and international air transportation in the Euro-Asian region (OECD, 2008). In this sense, the city has important advantages that have also been instrumental in its recent development. The geographic position of Istanbul between Europe, Asia and the Eastern Mediterranean, as well as its utilization of the Bosphorus as a waterway with strategic importance, makes the city an important node for international trade and transportation. Other major advantages include the existence of a bourgeoisie class, capital accumulation and its international relations and links with Western countries.

From the tourism perspective, Istanbul is also very attractive for cultural tourists, European urban travelers and is a stopover destination en route to other neighboring and long-haul destinations. On the other hand, some challenges are derived from the city's fast development and the great influx of migrants, both domestic and foreign, as well as visitors. This rapid growth has raised major issues related to congestion, insufficiency of infrastructure and social and environmental sustainability (OECD, 2008). These problems have also affected the cultural and historical heritage in the city, which is faced with destruction as it conflicts with the need for spatial growth. Another major predicament concerns the economic disparities between Istanbul and the rest of Turkey, and between the different neighborhoods within the city. This has led some authors to criticize the internationalization of the city, including its cultural events, as widening the gap between the affluent and the poor (Yardımcı, 2007).

The role of tourism and cultural events, which have been used as catalysts in urban development, has been essential in the growth of Istanbul. The focus on the development of the city as a popular tourism destination has been the source of major investments and financial incentives to develop the accommodation and transportation capacity in the city. At the same time, international organizations such as UNESCO and the European Union have also supported various restoration projects. Specifically, the nomination and declaration of Istanbul as the European Capital of Culture caused major investments in renovation and capacity building. On the other hand, private sponsorship of cultural and artistic output has increased significantly, mainly due to the economic development of the city, as corporations are competing to establish their image as patrons of the arts.

The economic development and globalization of Istanbul has been instrumental in the significant increase of business travel and the corporate market in the city. The rise in the number of international corporations with headquarters in the city has favored an important growth in the number of foreign business-related visitors to the city, with implications for hotels and other providers of tourism and hospitality services. At the same time, since the creation of the Istanbul Convention and Visitors Bureau, the city seeks to benefit from the meetings market. The success of Istanbul in attracting international meetings depends on its rising image as a culturally rich venue, the investments that have been made in infrastructure and superstructure, as well the newly created convention facilities in line with international standards. Though so, the meetings market is closely related to the economic and scientific development level in general, the role of Istanbul in the economy and the economic connections and international trade relationships of the country.

The internationalization of Istanbul, its economic growth, population increase and development from a cultural and touristic perspective warrant the classification of Istanbul as a World city. However, this has also brought about many challenges and problems related to sustainability and the ability to support the population and current level of activity. The need for greater planning and a better local governance is necessary for Istanbul to compete with other cities in the global arena. Furthermore, the city should benchmark itself against other cities, not only from the developed world, but also from developing nations.

XIII Istanbul and Antalya as Tourism Destinations[6]

The tourism industry plays an important role in generating foreign exchange in Turkey. Initially, the Turkish tourism industry was comprised of medium-sized enterprises offering city-based cultural tourist products focusing on the rich culture, history, archeology, religion, heritage and man-made resources of the country. Prior to the 1980's, these enterprises sold city-based cultural products in international tourism markets and received only a minor share of the demand. Liberal economic policies implemented during the 1980's to integrate the Turkish economy to the world economy also resulted in inbound tourism development in Turkey. Istanbul became a prime city destination and a hub for inbound tourism demand while Antalya became an important mass tourism destination on the Turkish Mediterranean coast. These two tourism destinations, Istanbul urban and Antalya coastal, deserve comparison in terms of their tourism supply, facilities, tourism types, demand characteristics and foreign visitor profiles. Hence, such a comparison might outline the main differences between niche and urban tourism, and coastal mass tourism types.

After the mid-1980's, Turkey became a well-known tourism destination, and its share in international visitor arrivals in Europe and the Mediterranean steadily increased. Economic factors affecting the urban structure of Istanbul transformed it into a major European city destination. Located at the periphery of Europe, Turkey became a Mediterranean mass tourism destination at a later stage. Developments in the Turkish economy with supportive systems for a viable tourism industry open to international competition came in stages and during the early 1980's, tourism in the country developed systematically (Korzay, 1994:87-90; Göymen, 2000:1031-1034), yet with stagnations and high costs. Internal factors, namely economic stabilization measures, incentives to attract foreign investors, liberalization of foreign trade, removal of exchange controls and in essence neo-liberal market economy policies (Altunışık and Tür, 2005:77-82), affected the type of tourism development and ultimately shaped the local tourism industry.

Transition from Cultural Urban Tourism to Coastal Mass Tourism

In 1982 the Tourism Encouragement Law was enacted which allocated public land for tourism investors and provided financial subsidies to accommodation investors. The South

6 Yarcan, Ş. 2012. A Comparison of Istanbul and Antalya as Tourism Destinations. 31 May - 3 June 2012, 2nd Advances in Hospitality and Tourism Marketing and Management Conference, Alexander Technological Institute of Thessaloniki, Democritus University of Thrace, Research Institute of Greece and Washington State University, Corfu Island, Greece. Paper submitted was published at proceedings in USB format. Permission was obtained to republish the paper in this work. I thank Mr. Erhan Tamur, who pursues a PhD study at Columbia University, for compiling most of the data and Mr. Osman Nihat Aydogan for his remarks for the development of the initial paper.

Antalya Tourism Development Project was realized to create a suitable environment for the development of inbound mass tourism (Inskeep and Kallenberger, 1992:85). A tourism specific infrastructure was built on the Mediterranean coast of Antalya using credit lent by the World Bank. This tourism specific infrastructure triggered the construction of large-scale hotels and holiday villages to meet the demands of multinational tour operators and European pleasure tourists. The World Bank Group's International Bank for Reconstruction and Development and International Finance Corporation are influential in the development of tourism infrastructure and facilities in developing countries (Hawkins and Mann, 2007:348). The IFC, participating in joint ventures, invested in city hotels in Istanbul and in holiday villages along the Mediterranean coast of Antalya. European tour operators then promoted Antalya as the new pleasure destination. Earlier, Turkey favored small-scale city-based cultural tourism with local investments receiving a limited market share from international tourism demand. Adopting coastal mass tourism as the public policy attracted the international hotel chains, multinational tour operators, and foreign leisure airlines to Turkey. These firms jointly produced standard organized coastal inclusive holidays playing a crucial role in Turkish tourism.

Favoring mass tourism led to the neglect of sustainable city tourism. Coastal mass tourism has limited spillover effects on the economy. Type accommodation investments realized along the coast of Antalya resulted in the emergence of inclusive holidays as the dominant product type. Currently, organized tourist products of Turkey primarily comprise of beach holidays while multi-destination cultural tours comprise a niche market. Ever since the policy of mass tourism was adopted, the local tourism industry has tried to overcome various political and economic crises over which neither they nor Turkey have had any control (Yarcan, 2007:780). Crises decrease the volume of foreign visitor demand. The prices of tourist products sold in international markets decrease as the products are identikit and the demand is elastic. Yet, governments did not provide incentives for the Turkish owned private airlines and tour operators in order to increase the competition power of these firms against their foreign counterparts. Political tension, conflicts and wars in the Middle East adversely affects the volume of international tourism demand to the Eastern Mediterranean. Unfavorable country and destination images intensify the difficulties in marketing Turkey's tourist products in the international markets (Alvarez, 2010:129-130).

After the realization of coastal tourism specific infrastructure and superstructure investments, the local tourism industry became prone to external factors. The standard coastal inclusive holiday is sold at very low and competitive prices under oligopolistic market conditions (Baum and Mudambi, 1994:88-89). Turkish tourism firms adopted the policy of selling all-inclusive holidays at competitive prices and also recently by advance sales and last-minute bookings. As a consequence of the consumption of holidays at coastal enclaves, the contribution of inbound tourism to the economy is limited. Foreign tourists stay at holiday villages and they do not have any contact with the locals. Hence, a real destination image cannot be conveyed. Isolating beach tourists is a policy of tour operators to exert power over the supply chain and the components of organized holidays, aiming to maximize profits by diminishing transaction costs. All-inclusive holidays meet the expectations of tourists since extra expenditures are not incurred.

Istanbul and Antalya as Tourism Destinations

City tourism creates sustained continuous demand. City tourism is closely related with culture. A city trip is a cultural and enriching experience for urban cultural tourists, such as experiencing the way of life of residents, being a part of the city life, experiencing cuisine etc., (UNWTO and ETC, 2005:3). Istanbul has a unique feature of having cultural, historical, heritage, social, religious and man-made attractions for urban foreign visitors. Tourism products of Istanbul are creative, unique, and not produced solely for visitors as attractions, but they are a part of the everyday life of the residents (Maitland, 2010:178). Either, they visit the city in an organized form or independently; foreigners and citizens encounter contacts with each other in Istanbul. City tourism, that includes cultural activities, visiting museums, heritage sites, monuments, and shopping malls creates a favorable destination image. Due to the nature of the varied available products and mutual use of the city, facilities with the locals and the cost of developing city tourism is low. Istanbul attracts more foreign visitors each year because of improvements in its urban texture, infrastructure, airports and seaports, transportation links and hotel investments. Economic and financial activities, foreign trade and the existence of international firms in the city play a role in this process. Istanbul is the most visited city in Turkey. The region of Antalya is the prime mass tourism destination.

Turkey’s market share in international visitor arrivals in Europe and the Mediterranean has steadily increased since 1982. Istanbul started to rise as a well-known city abroad when Turkey’s market share in Europe and the Mediterranean increased. Istanbul and Antalya are located at different geographies. They differ in their tourism supply, infrastructure, resources, tourist attractions, facilities, tourism types and products. Istanbul is a world city (Alvarez and Yarcan, 2010:266), while Antalya and its environs is a coastal tourism destination. Istanbul attracts very different types of foreign visitors from many various countries. Antalya attracts mostly European pleasure holidaymakers who stay at holiday villages while Istanbul developed by its internal dynamics as a city tourism destination. The local tourism industry is influential in marketing

Istanbul abroad as a "historic and former capital" (Maitland and Ritchie 2009:18). The city is the arrival and departure port for foreign culture tourists and for the participants of Biblical, archaeological, and heritage tours visiting also other regions in Turkey. The main sectors of the tourism industry such as local tour operators, hotel chains, private sector airlines, dining and nightlife establishments, meeting facilities, and shopping opportunities have facilitated the process in which Istanbul became a preferred destination for foreign visitors. Istanbul's role in the Turkish economy, high per capita income, its rich resources, the port and hub character of the city and links with the western world and Central Asian Countries affects the tourism development in the city (OECD, 2008:73). Istanbul, with a global status, is a center of art, festivals, recreation, culture, heritage and cultural industries (Gezici and Kerimoğlu, 2010:254). Antalya has only a few cultural activities such as the Antalya Film Festival and Aspendos Music Festival. The dynamics of tourism in Istanbul is inherent and endogenous. Tourism at Antalya that is externally driven by the multinational tourism enterprises is dependent and exogenous.

The Ministry of Culture and Tourism operation licensed the accommodation capacity of Turkey and has steadily increased since 1982. The increase in the share of the Mediterranean region, where Antalya is located, within the total number of beds in Turkey against the Marmara region, where Istanbul is located, signifies the transition to coastal mass tourism. In the early phases of Turkish tourism Istanbul ranked first in bed capacity and foreign visitor arrivals, but lost its share against Antalya. The shift in accommodation type, from city hotels to resort hotels and holiday villages indicates the transition from city tourism to coastal mass tourism. Consequently, the inbound tourism demand shifted from city tourism and cultural tours to sojourn mass tourism. Hotel investments are concentrated in three districts of Istanbul coupling with the leisure tourist demand, business and corporate demand and attractions of the city. These regions are the Historic Peninsula, Taksim district and the new central business district on the European side of Istanbul. Coastal mass tourism developed through large-scale accommodation investments at spatially polarized zones of Antalya. The spatially concentrated ribbon accommodation investments on the Antalya coast have resulted in detrimental environmental damages (Erkuş-Öztürk, 2010:109). Economic, social and cultural effects are observed in small towns due to employment in the tourism industry, and a change in income levels and family structures. At both destinations, accommodation units are of high quality. Currently, the majority of licensed hotels in Istanbul and Antalya region are boutique or special hotels, four- and five-star hotels, and holiday villages. Room rates and revenues in Istanbul are high, while all-inclusive rates are quite low at Antalya. Some resort hotels and theme club hotels in the region are kitsch in style.

Role of Tour Operators and Airlines on Inbound Tourism

Foreign tour operators played a crucial role in the process of Turkish inbound tourism development. During the mid 1980's, multinational tour operators created a new modern holiday destination image for Turkey in order to increase the tourism demand, widen their market and product profile, and consequently to increase the profits. European holiday tour operators' behavior in producing and selling all-inclusive holidays for Mediterranean Turkey and the way fully inclusive holidays are organized are coherent with the sun, sea and sand tourism model (Aquilo, Alegre and Sard, 2005). Although foreign tour operators dominate the inbound mass tourism market, there are Turkey based tour operators in Europe, the Russian Federation, the Commonwealth of Independent States (CIS) countries and Egypt that also sell other Mediterranean sun destinations. There are foreign tour operators, a few with local joint ventures, based in Turkey that create coastal tourist demand to Antalya. The foreign firms also operate in city and cultural tourism market segments. The Turkish tourism industry is internationalized due to the structural shift in the tourism type, mass tourism, and holiday patterns. As well multinational corporations and international business networks that take an essential part in international tourism played an instrumental role in shaping Turkish tourism. That lead, along with Europeanization and internalization of the local tourism (Jakobsen, 2003:74-75,77), integration of domestic tourism firms with their counterparts. Currently, diagonally integrated multinational and national tour operators based in Europe sell Turkey as a destination for all-inclusive beach holidays.

Turkish owned private airlines and low-cost airlines, over the years, increased their seat capacity and improved their flight networks. Private and low-cost airlines increase inbound tourism demand in general and particularly urban tourist demand for Istanbul. Turkish Airlines has a wide flight network and generates cultural tourism demand for Istanbul and Turkey from distant tourist origin countries. Low-cost airlines create a new visitor demand for Istanbul, enable leisure tourists to revisit the city, and serve for the weekend and individual city escapist travelers from Europe. Leisure airlines, integrated with tour operators, carry the organized beach tourists to Antalya. Turkish owned private airlines also fly to Antalya from main European cities.

The Characteristics of Inbound Tourism Demand

Istanbul and Antalya are different tourism products and have divergent tourist attractions and products. Istanbul attracts foreigners mainly from Europe, Russia and long-haul tourist origin countries and from Eastern Mediterranean countries, who have very different travel reasons and diversified motivations. Antalya attracts sun-lust motivated holidaymakers from Europe and Russia. Germany and the Russian Federation generate most of the inbound tourist demand for both cities.

Istanbul offers tourism related products and services for a wide range of foreigners who visit the city as leisure tourists, business travelers and cultural urban tourists. Leisure tourists in Istanbul experience the daily city life, view architecture and monuments, enjoy the historical environment, visit the old bazaars, cruise on the Bosphorus, taste the rich cuisine, participate in entertainment activities and nightlife. According to a survey conducted at the Historic Peninsula among foreign visitors on the image of Istanbul, the respondents have a favorable brand personality and image of the city. The respondents describe the brand personality of Istanbul as historic, pleasant, colorful, dynamic, modern and relaxing. Istanbul is perceived as a blend of East and West, rich in cultural heritage and architecture (Şahin and Baloğlu, 2011:75, 78). Such comments are in conformity with Istanbul's unique attractions that include the Blue Mosque, Bosphorus, Hagia Sophia Museum and Topkapı Palace Museum. In another research conducted among the foreigners who visited the main museums of the city, the images held are found to be highly favorable. Istanbul is perceived as an attractive tourist destination, a historical and modern city with rich entertainment and nightlife, and a city to rest with a different culture and atmosphere (Altınbaşak and Yalçın, 2010:244-246). European and Russian holidaymakers arrive at Antalya for leisure of the Mediterranean although the city and its environs have archaeological and historical attractions. Leisure at Antalya is a beach holiday at a seaside enclave, entertainment being organized within the resort hotel or holiday village. Although culture is a main reason for foreigners to visit Turkey, culture does not imply history, archaeology, religious attractions or museum visits. Seaside holidaymakers do not visit museums, but possibly join a daily optional sightseeing tour organized by the holiday tour operator. The urban travelers to Istanbul, and the city break, weekend tourists from Europe do not necessarily visit museums in Istanbul, but they live the rich daily life of the city. Thus, foreign visitors' statements in choosing Istanbul and to an extent Antalya as a culture destination would be misleading.

At both destinations inbound tourism demand is seasonal. Tourism demand for Istanbul is more evenly distributed. The demand distribution for Antalya is highly seasonal with peak summer months. Seasonality is an acute problem for the tourism industry, the residents and tourism employees in Antalya. The hoteliers in the region aim to attract meetings, incentive organizations and members of sport teams during winter months to overcome problems created by seasonality. Seasonality is an inherent character of coastal mass tourism. Consequently, the cost of developing tourism in Antalya is very high, due to the cost of creating tourism infrastructure and underutilized facilities during the off-season. Foreign visitors benefit from the existing urban infrastructure, transport systems and roads and other city facilities and amenities that the citizens of Istanbul use. Accommodation units in Istanbul attract meetings and incentive organizations during shoulder months. The economy of Istanbul is not affected severely even during a crisis, taken that the foreign visitors use the existing urban infrastructure and superstructure. The inbound tourism demand to Antalya increases continuously though with low rates and profits. The demand of mass tourists is more sensitive to economic and political crisis and elastic to prices. The inbound tourism demand for Istanbul does not fluctuate as much as it does for Antalya. The tourist attractions of Istanbul are unique, cannot be substituted and experienced city tourists are less affected by crisis. The foreigners who visit Istanbul as the final destination or en route to other regions in Turkey acquire a better destination image. The secluded organized mass tourists have a pseudo destination image of Turkey.

A comparison of the differences between tourism supply, characteristics of the tourism industry and inbound tourism demand of Istanbul and Antalya show that these cities have distinct characteristics. The foreign visitor profiles of the two cities are different because of the nature of the tourist products and related services available at each destination. The contribution of inbound tourism to the economy, the cost of tourism development, cultural, social and environmental effects of tourism at Istanbul and Antalya are not the same. The comparison of Istanbul and Antalya as tourism destinations can be outlined as follows;

Table 10. Comparison of Istanbul and Antalya as Tourism Destinations

	Istanbul	***Antalya***
Supply		
Infrastructure	Urban, general infrastructure	Coastal, tourism-specific infrastructure
International Air Travel	Scheduled airlines, Turkish-owned private airlines, low-cost airlines	Leisure airlines, Turkish-owned private airlines, low-cost airlines
Distance & Destination	Long-haul, European and other countries Single and multi-destination	Short-haul, Europe Single destination
Resources & Attractions	Unique, cultural and man-made Historical, heritage and religion Museums, monuments and daily city life	Standard, sun, sand and sea Facility, resort hotel and holiday village Nature, recreation and leisure activity
Image	Destination, city image, favourable and real Created by specialist tour operators	Holiday and pseudo-destination image Created by holiday tour operators
Tourism Products	Organized cultural and heritage tours Independent tours and individual services Business and corporate services Conference and incentive organizations Weekend and city break holidays Diversified, niche products Rich entertainment, night life	Organized all-inclusive holidays Sojourn vacations Orientation tours Optional extra tours Standard packaged product Identikit destination and same product Inauthentic, staged entertainment
Accommodation Type & Organization	City hotel, boutique and special hotel Foreign and local tour operators	Resort hotel and holiday village International tour operators
Travel Organization, Marketing & Sales	Specialist tour operators Local tour operators Different retail distributers	Multinational holiday tour operators Other integrated tour operators Retail travel agencies
Industry Structure	National and autonomous	Multinational, foreign and dependent
Demand		
Volume	Low, sustained and continuous	High, fluctuating and volatile
Origin Countries & Generating Markets	Multiple tourist-generating countries Long- and short-haul markets	A few tourist-generating countries Short-haul market, European countries
Visitor & Tourist Profiles	Educated, independent, city leisure tourists Businesspeople, meeting participants Middle and high-income visitors Less elastic to income, prices and crises Demand directed by specialist operators	Organized mass leisure tourists Low and middle-income holidaymakers Elastic to income, prices and crises Demand created and directed by international holiday tour operators
Seasonality & Length of Stay	Less seasonal Short	Highly seasonal Long
Effects of Tourism		
Economic Effects	Low development costs Beneficial for the city and citizens	High development costs

Conclusions

The tourism industry and its main sectors such as the accommodation, travel trade and airline sectors have different characteristics in Istanbul and Antalya. The available tourist products of Istanbul and Antalya sold in the international tourism markets are different. Therefore, the characteristics of demand and the profiles of the foreign visitors of both destinations also differ. Usually, comparisons are made between similar cities and destinations, such as the world cities. Istanbul is an established city destination visited by foreigners from Europe and distant countries for culture, leisure, business, meetings, shopping and for other reasons. The inbound tourism demand for Istanbul will continue because of its proximity to Europe and its foreign trade links with nearby countries. Istanbul has a very favorable destination image. As one of the top city destinations in Europe, Istanbul competes with the historic capitals such as London, Paris and Rome. The cost of tourism development in Istanbul is low and the economic benefits are high. Headquarters of most of the tourism firms, hotel companies, airlines, tour operators and specialist local tour operators are located in Istanbul. Hence, Istanbul controls tourism in Turkey and shapes the Turkish tourism industry.

Antalya, on the Turkish Mediterranean coast, has been developed as a coastal mass tourism destination with excess and large-scale accommodation investments. Accommodation investments continue in the region at a high pace. Antalya airport was privatized and renewed in order to serve the high volume of foreign tourist arrivals. The inbound mass tourism demand to Antalya is external and dependent on multinational tourism corporations. The local tourism entrepreneurs adhere to the demands of the international tour operators to manage and market their premises. The tourism achievement reached at Antalya is a growth rather than development. Until recently, the emphasis in Turkish inbound tourism was to sell cheap, standard inclusive holidays, instead of marketing expensive and profitable differentiated products such as city tourism, culture, heritage and Biblical tours and other similar products.

The comparison of Istanbul and Antalya as tourism destinations proves that the contribution of city tourism to the Turkish economy is more than that of mass tourism at Antalya. In some of the new key tourism demand generating countries for Turkey, such as the Russian Federation, Ukraine, and Poland, Turkish tour operators are influential. Yet, they operate under fierce price competition conditions due to the nature of the coastal mass tourism market. Already, a few of the Turkish owned tour operators based abroad have been taken over by multinational tourism corporations. Similar takeovers, mergers and joint ventures will take place in the near future. In such a competitive environment Turkish owned tour operators and private airlines should be subsidized and protected. Even in the most liberal economies, governments protect their airlines whether a national flag carrier or not.

Istanbul and Antalya are developed, mature and well-known destinations in international tourism markets. In both of the destinations, tourism investments and the inbound tourism demand will continue to increase. The national travel trade firms are more powerful and have the expertise to market and sell Istanbul together with the other culture and heritage destinations in Turkey. Public authorities responsible for tourism policy should promote Turkey as a culture and heritage destination. Istanbul should be promoted and marketed as a distinct entity and as a modern, living city destination coherent with the images held of Istanbul by foreign visitors. Creating awareness for Istanbul as an attractive city destination among the potential foreign urban visitors will also increase the inbound tourism demand for Turkey. The comparison of Istanbul and Antalya as tourism destinations indicates that the priority of Turkey's tourism policy should be to develop city tourism and cultural tourism. The local tour operators and specialist tour operators should promote and market Istanbul as an independent, unique city destination. On the other hand, mass tourism investments will continue in accordance with the liberal market economy rules. Supporting the unsustainable mass tourism is a kind of subsidy provided to foreign leisure tourists for them to have a cheap holiday in Turkey.

XIV Epilogue - Geopolitical Dimensions of Tourism[7]

Leisure travel for tourism purposes and other forms of travel, business, incentive, meetings etc., are possible only through the applications of ruling powers and administrators both at the origin and destination countries and states. The role of tourism in exacerbating or eliminating the gap between developed and less developed regions and developing countries is crucial.

Geopolitics studies the relationships between geography and politics. Geopolitics deals with the power and hegemony conflicts and how these conflicts create risks for countries and affect the international relationships between states (Üstel, 2004:18). The word geopolitical is used simply to indicate a perspective or mode of analysis focused on the interrelationships between space, territory, territoriality, and power (Cohen, 2003). Throughout the 20th century the dominant geopolitical views situated the sovereign state as the fundamental spatial, geographic unit for the projection of power and territoriality. At interstate organizational level, states are combining their efforts into regional and multilateral entities. Cooperation between states is attempted to achieve solutions for complex international economic, political and environmental problems. The mission of the United Nations is to maintain peace. Member organizations of the United Nations related to tourism are EU, the European Union, NAFTA, the North American Free Trade Agreement, ASEAN, the Association of Southeast Asian Nations, WTO, the World Trade Organization, UNWTO, the United Nations World Tourism Organization, UNDP, the United Nations Development Plan, UNESCO, the United Nations Education, Science and Culture Organization, and many others.

Some organizations are political in nature, e.g., the United Nations, some both political and economic in nature, e.g. the European Union, some purely economic, e.g., the United Nations World Tourism Organization, the North American Free Trade Agreement, and the United Nations Development Plan, and some are cultural, e.g. the United Nations Education, Science and Culture Organization (Union of International Associations, 2016).

The relationship between tourism and geopolitics is not studied in detail. Contemporary geopolitical discussions rarely mention tourism. On the other hand, tourism analyses rarely fit into a geopolitical context. International tourism and tourist flows are inherently geopolitical activities, with economic and political outcomes that involve mass movement of people across boundaries. Such travel is possible only through the exercise of sovereign powers of both the origin and destination countries and states. An important discussion topic is the role of tourism

7 Geopolitical Dimensions of Tourism is written by adopting the terms used by Weaver, D. B. 2010. Geopolitical Dimensions of Sustainable Tourism. Tourism Recreation Research, 35(1):47-53.

in exacerbating or eliminating the gap between economically developed and less developed regions and states. Geographically uneven economic development creates differences between countries. Inequality in economic development increases the gap, and the difference between the dominating core regions and dependent periphery regions. Geographically, uneven economic development, arising from policies of colonialism and neo-colonialism, creates and increases the gap, and the difference between the hegemony of core regions and dependent periphery regions. The hegemony of the developed countries reinforces geopolitical conflicts (Cox, 2002). The hegemony of the developed countries in tourism creates political conflicts and developed country firms and governments exert pressure on developing country in issues relating to tourism. This includes international organizations such as IMF, the International Monetary Fund, the World Bank, and the European Bank for Reconstruction and Development (Mowforth and Munt, 2003:291).

The division of economic, political and cultural cores and peripheries creates unsustainable economic and geopolitical balances in tourism. Tourism contributes to this conflicting situation between origin and destination countries through the creation of the Pleasure Periphery (Turner and Ash, 1975). The center-periphery hypothesis, valid in international tourism, creates unsustainable economic and geopolitical relationships in most cases. Since tourism contributes to this conflict between origin and destination countries, there is a similarity between tourism and other economic activities. The origin developed countries are the core centers and the destinations are the pleasure periphery. The periphery in international tourism is created by international organizations, international banks and finance institutions, foreign investments, investments of multinational tourism corporations, tourism industry organizations, infrastructure investments at developing countries, tourism superstructure investments at developing country tourism destinations and finally, the legal framework provided by tourist receiving countries. The geopolitics of core–periphery disequilibrium is against the economic and also to some extent political interests of underdeveloped economies. In other words, tourism is a new type of dependency for the developing country destinations whose economies are weak. Tourism creates economic dependency for destinations where national economies and political structures are weak.

In some cases, international tourism and tourist flows help to improve relationships between countries too. Constructive encounters are established between tourists as guests and residents as hosts when they interact with each other. Through cooperative practices, tourism contributes to this understanding. In the case it is realized, such cooperative practices in other international tourism settings show that tourism may develop understanding between different country citizens. In other words, not only the individuals would be functional in developing closer ties between countries and their residents, but the economic joint ventures would promote such understandings, depending on the level of economic development and progress maintained at the destination. Taking into account that travel requirements are subject to public body approval and documents at administrative level, the role of public bodies is the most important and instrumental one.

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