

Social Aspects of Tourism Formation and Development in Kazakhstan and in Turkey: Comparative Analysis

¹Kh.M. Mamanova, ²M.S. Sadyrova and ³H. Tufekcioglu

¹Kazakh National Pedagogical University by Abay, Almaty, Kazakhstan

²Kazakh National University by Al-Faraby, Almaty, Kazakhstan

³Istanbul University, Turkey

Abstract: In Kazakhstan the tourism industry is considered to be one of the most promising sectors of the economy the successful development of which will enhance the competitiveness and will help to get rid of raw material dependence of the country. In connection with it the country has enhanced supervision and monitoring along with the implementation of the formation of the tourism industry development strategy. The official example of that is the Republic of Turkey. The article also explores the story of the formation and the development of the tourism in the Republic of Turkey in the period of 1963-2011, it gives the comparative analysis of the formation of tourism in Kazakhstan.

Key words: Tourism • Tourism in Kazakhstan • Statistics of tourism development in Kazakhstan • Dormation and development of tourism in the Republic of Turkey • Statistics of tourism in the Republic of Turkey

INTRODUCTION

As one of the fastest growing sectors of economy tourism provides ample opportunities for the development of the countries, contributing to their socio-economic well being, increasing employment rates, foreign currency inflow, raising living standards and poverty reduction.

According to the definition of UNWTO: "... tourism is travelling for different purposes with a duration up to one year without the financing of destination countries" [1]. In 1994 the UN in one of its edition «Recommendations on Tourism Statistics» gives a categorical definition of tourism as domestic tourism, inbound tourism and outbound tourism [2].

Tourism is one of the types of socio-economic activity that is characterized by diversity and complex structures. This gives the possibility to be the subject of research in sociology, economics, politics, law, environment, health protection, culture etc. As a result of it tourism may contribute to the development of the country in many respects: propagation of peace and harmony, legitimacy of human rights, improving education, increasing national awareness, environmental protection and protection of possessions.

In this study the comparative sociological analysis of the formation and the development of tourism of two countries was chosen as methodology, the main results of which the author will clarify in the main part of the article.

Tourism in Kazakhstan: In Kazakhstan the tourism industry is considered to be one of the most promising sectors of the economy, the successful development of which will enhance the competitiveness and will help to get rid of raw material dependence of the country.

The legal basis for tourism in Kazakhstan is the law "On Tourism Activities in the Republic of Kazakhstan", "The Concept of the Development of Tourism in the Republic of Kazakhstan", "State Program on Tourism Development in the Republic of Kazakhstan for 2007-2011", "State Program of Forced Industrial-Innovative Development for 2010-2014". In the Concept of the Program of industrial-innovative development and the State Program of FIID tourism is underlined as a separate direction of one of the three main blocks of economic development - "The development of new labor-intensive industries" [3].

The tourist industry in Kazakhstan along with the financial instruments is also stimulated with the help of legislative actions. One of the popular steps in this direction is the cancellation of the state licensing of the travel agencies activities which became operational in January 2012. According to the opinion of the participants of the tourist market, the liberalization of the legislation significantly increases the access to the market and reduces the administrative barrier for new participants. However, in spite of all the efforts of the authorities the rate of the development of the tourist industry in the country remains unsatisfactory. According to statistics, the share of tourism in the formation of the national income is only 1%. The tourist attractiveness of the country is evaluated as low. According to the ranking of the World Economic Forum "Travel and Tourism: Competitiveness 2011" Kazakhstan is in the 93rd place out of 139 countries. It is also significant that according to the annual ranking of the World Tourism Organization "World Tourism Barometer" in 2010 Kazakhstan was not included in the list of top five tens of the leading countries of the world tourism rankings.

Only outbound tourism is steadily developing in Kazakhstan today. According to the Statistic Agency of Kazakhstan, in the period from 2007 to 2011 the population of the country that went to other countries grew from 4.5 to 8 million people. The number of those who use the services of travel companies to organize trips to other countries is steadily growing – from 295 thousand in 2007 to 391 thousand in 2011 [4]. These figures show, first of all, the growth of the purchasing power of citizens against the economic recovery in post-crisis period. The main tourist destinations of Kazakhstan citizens are Turkey, China, the UAE and Thailand.

But from the point of view of the development of its own economy outbound tourism cannot be a measure of the successful development of the tourist segment. The level of the development of the tourism industry in any country is measured by the indicators of inbound and outbound tourism.

In 2011 the volume of inbound tourism, according to the Agency of Statistics was 5.7 million people, i.e. that many people travelled to Kazakhstan during the year. Only 36 thousand of them or 0.64% from those who entered the country used the services of the travel agencies. For the last five years one can observe a downward trend in using the services of the tourist firms by foreigners. Thus, in 2007 the travel agencies served 62 thousand people and in the crisis year of 2009 this figure reduced twice to 31 thousand people.

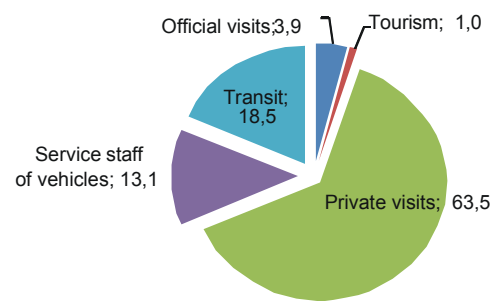


Fig. 1: The distribution of non-resident visitors who entered the country according to the purposes of the trip, in percent

Visiting Kazakhstan by foreign citizens is mostly private. According to statistics more that 63% of the visitors in 2010 came here for private purposes and with the aim of tourism came only 48 thousand people or 1% from all non-resident visitors [4].

The comparative data for the recent years says that the tourist attractiveness of Kazakhstan abroad does not only remain low but continues to decline even more. As can be seen from the following figure the number of tourists reduced almost twice in the period from 2006 to 2010 – from 92 thousand to 48 thousand.

Among the non-resident visitors the share of people from the countries of the former Soviet Union prevails significantly – 89%, to be more precise – from Russia, Kyrgyzstan and Uzbekistan. Foreign visitors come to Kazakhstan most often from China, Germany, Turkey and the UK.

The situation in the segment of domestic tourism is more optimistic. The data show that over the past ten years the number of domestic tourists served by the travel agencies has doubled and is more than 200 thousand people. At the same time the number of the sold tours in 2010 equaled 205 thousand units that is 2.5 times more than in 2003. In the total share the visitors served by the tourist organizations are 34% and judging by the dynamics the volume of domestic tourism will grow for the next several years. According to the experts, the development of the tourist objects in the state and the decline of interest to outside travel in connection with the instability in such states as Greece, Egypt and other Arab countries contributed to the growth of domestic tourism [5].

Thus, the general overview of outbound, inbound and domestic tourism in Kazakhstan clearly detects the problem of imbalance of the tourist segment. The tourism market in the country, as it was shown above, is mainly oriented toward outbound tourism, served by the majority of the travel agencies. Inbound tourism remains the most

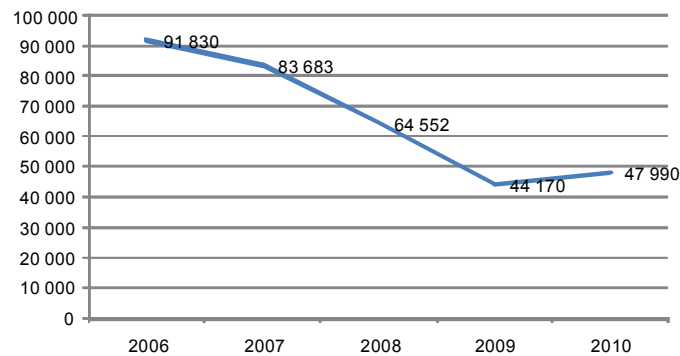


Fig. 2: The dynamics of the number of non-resident visitors who entered the country for tourism purposes, number of people

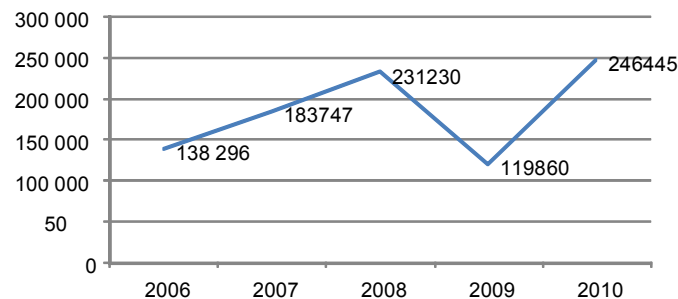


Fig. 3: Investments in fixed assets in tourism, million tenges

problematic area of the tourism industry. Unfortunately, in spite of all the measures taken, the number of foreigners choosing Kazakh tourist destinations is too small to be the basis of the tourist market stimulation.

The analysis of the current situation shows that there is a complex of problems because of which the tourism industry in Kazakhstan cannot get to the stable level of development. These problems are generally known and are voiced for the past few years both by the government officials and by different experts to some extent representing the tourism industry. From the review of open sources one can present the following classification of the factors hindering the development of the tourism industry in Kazakhstan.

The key problem of this trend is the low volume of the investments attracted in tourism and unstable rates of their growth. In 2010 246445 million tenges were invested in tourism. In comparison with 2006 the volume of investments grew considerably but it should be noted that in 2009 it amounted only to 199860 million tenges. In this case the consequences of the economic crisis, which revealed that the tourism industry is very “sensitive” to economic fluctuations are obvious.

A big share of investments in the tourist sector occurs in individuals. Thus, in 2010 almost 70% of investments in tourism occurred in private sector. 27%

of investments were financed from the state budget. Only 4% of the total volume of investments were invested by foreign investors [4, 5].

The lack of the tourist industry attractiveness of Kazakhstan for foreign investments is caused first of all by the low level of the development of transport infrastructure, especially roads in the regions [6]. The base of the tourism industry in any country is the developed infrastructure of international level to create which substantial cash infusions are needed. The current volume of investments, as experience shows, does not let achieve significant success in this direction that’s why the question of expanding the investment base is extremely topical at the moment.

The problem of the poor condition of tourism infrastructure is multilayered. The problem is not only in worn out and limited roads and railways but also in weak development of the hotel network, city hotels, motels, campings along highways, hiking trails. Today hotel networks in major cities such as Almaty and Astana are relatively developed. Most of the accommodation facilities are worn out because they were built during the Soviet period.

Now the country has 677 placements that is 212 placements more than in 2006. In spite of the increase in the number of accommodation facilities, their rate of filling

is very low. Thus, across the country this level equals 21%. One can speak about the effective hotel network in the country only if the filling rate is more than 60%. Only Atyrau and Mangistau regions can “boast” such filling rates - 60 and 64% accordingly.

Kazakhstan placements are not very popular among foreign visitors and the fact that their services were used only by 12,6% of the citizens of other countries who arrived in Kazakhstan in 2010 supports this idea. That is, if this year 4.7 million foreigners visited our country only 594 thousand of them stayed in hotels and other types of placements.

An integral part of tourism infrastructure is the system of training professional personnel in tourism and service. Today there are no problems with personnel maintenance in the tourist activity only in such cities as Almaty and Astana, while in other regions there is an acute shortage of the workers in this sector. It is not just about professional guides and tourism managers, but also about maintenance staff. The main reason is low wages in the sector, inefficient system of training personnel, the lack of opportunity for students to undergo practical training and the low level of knowledge among teachers. It is clear that under conditions of the shortage of qualified personnel in service and tourism entrepreneurs have to hire people without special training or experience that certainly affects the quality of services provided.

The next set of problems can be combined into the group of political and administrative because they all to some extent are connected with the imperfection of the state planning and regulation of the tourism industry. According to the experts in Kazakhstan the legal and normative base for the tourist activity remains ineffective enough. In particular, administrative barriers and the expenses of the business permit system are mentioned. According to international experts the business climate of Kazakhstan is not favorable enough for the development and functioning of tourism. Also, from time to time problems appear in connection with the weaknesses in the area of taxation.

The problem of ineffective strategic planning of the tourism industry development requires special attention in this group. As it is known, the program of the development of the industry was realized between 2007 and 2011 and a lot of funding from the state budget was allocated to the program. At present the next program is being developed, but up to now the audit of the realization of the previous program has not been conducted. It remains unclear if the program of 2007-2011 was a success or not, what tasks it has solved and what

tasks remain unsolved. Without this understanding it is impossible to talk about the continuity in the state policy in tourism, that in its turn is one of the necessary conditions of the success of the whole complex of measures aimed at the development of tourism in Kazakhstan.

Taking into consideration the above-mentioned tendencies the perspectives of the tourism industry in Kazakhstan in the medium term seem very vague. In case if the situation when tourist firms develop only at the expense of outbound tourism continues and the number of non-resident tourists steadily declines it is difficult to expect significant progress in this area. Especially if we consider that the measures taken by the state has not yielded significant results.

In Kazakhstan today the work on preparing a new program of long-term development of tourism industry is conducted. According to the statements of the management of the Ministry of Industry and New Technologies mechanisms of solving the existing problems in tourism will be provided in this program. By the end of this year this ministry is planning to hold a competition for regional projects, make financial and economic analysis of the tools of state support and to prepare system plans for the development of the industry. The aim of the program is to make tourism in Kazakhstan a powerful industry that provides steady GDP growth and stimulates development in many related industries.

It is not by chance that Kazakhstan chose such countries as Turkey and Malaysia, which today are absolute leaders in the world tourism market, as its model of development. The experience of these countries shows that in a relatively short period of time it is possible to make significant progress in creating tourism industry. The main thing is the carefully thought out policy in tourism and systematic approach in its realization.

Tourism in Turkey: The Republic of Turkey got its independence in the early XXth century. For many decades the country has been undergoing economic crises, civil strife with neighboring countries, repeated changes of government and political regimes which caused downtime in tourism development in the country. But in spite of the fact that Turkey entered the world market of tourism late it took in it a worthy place [7].

The tourism industry began to attract the attention of the Turkish authorities from the second part of the XXth century. The basis for the development of tourism became numerous natural and historical sights of the state and socio-economic support of the government.

Since the 1960s they began to develop five-year plans. In the first five-year plans of development they paid special attention to making profits from improving the tourism infrastructure and enlarging places for leisure travelers. The lack of financing and investment hindered the development of tourism potential in Turkey. In connection with the growing demand for tourist services in the world the Ministry of Tourism of Turkey launched projects for the development of resorts. A new period in tourism development in Turkey started in mid-80s. It was then that the thesis about the priority of the tourism industry expressed in the programs of the development started to get its real embodiment. First, in 1982 the Law on the Promotion of Tourism No 2634 was adopted that replaced the law No 6086 which had been in force since early 1960s. This law contained more incentives for the development of the industry, the Ministry of Tourism got more authority. Among the incentives one can mention reduced tariffs for electricity, water and gas in priority areas, exemption from certain taxes and fees, preferential loans for the subjects of the tourism industry. The Ministry of Tourism got more freedom in choosing areas for the development of tourism and planning.

Second, in 1983 the government of Turgut Ozal came to power. It adopted the policy of privatization, deregulation of prices, import liberalization, private sector development and other measures of the transition to a free market economy [8]. It gave its positive results. The private sector became especially active. Due to this policy in Turkey they started to create free economic zones that played a crucial role in the development of tourism.

Free zones were created in accordance with the Law on free zones No 3218 of June 1985. The aims of their creation were the intensification of investments, the increase in production in the export sector, the activation of the arrival of new technologies in the country. Within the free trade zones the acts of legislation pertaining taxes and other types of compulsory fees, including commissions when buying and selling currencies, do not operate. Income from the operations in the free zone of individuals and legal persons living in Turkey is exempted from income and corporate taxes. When entering the zone and leaving it custom legislation operates but custom duties and other charges are not applied to the goods exported to other countries. There are only payments to the Fund of the establishment and development of the zone that equal 0.5% of the value of

imported and exported goods. However, these payments are not made from the investment and other goods imported to the zone on the stage of creation or repairing of the industrial enterprise.

Orientation toward external relations in the period of reforms, the creation of a competitive environment in the economy and in the service sector, in particular ensuring socio-economic stability in the country, made the development of tourism more active. In a short period of time in Turkey with the help of foreign investments a wide hotel and camping network was created, quality roads were built and the training of highly qualified guides with the knowledge of the main European languages began. They started to pay a lot of attention to the reconstruction of the old points of interest.

The process of formation and the dynamics of the development of tourism in Turkey according to the political periods can be seen in the following table.

In recent years tourism has been the most successful sector of the Turkish economy and has contributed to the integration of the country into the world economy. Seeking to get more revenue Turkey is revising its tourism policy relying on its potential [8].

- Strong state policy (1924-1950)
- Soft liberal policy (1950-1960)
- The planned economy (1960-1980)
- Transition to the privatization policy (1980-1990)
- Liberal economic policy and dominant private sector (1990 up to now) [9].

Tourism sector plays an important role in the economy of modern Turkey. To illustrate this one can calculate that the revenue from tourism in 2010 equaled 2.6% of GDP. In 1963 this share equaled only 0.1%. The share of tourism revenues in total exports of goods and services is increasing.

Large investments made it possible to create the most diverse tourism sector in a relatively short period of time. Transport and placements, food network and entertainment – each segment of the tourism in Turkey corresponds to various demands of the customers [9]. The project of the company “Betuyab” can be especially noted. “Betuyab” was the first private company that invested in the construction of new hotels and the infrastructure of Belek. Its creation became possible after the adoption of the law on the support of tourism. The company contributed to the development of one-third

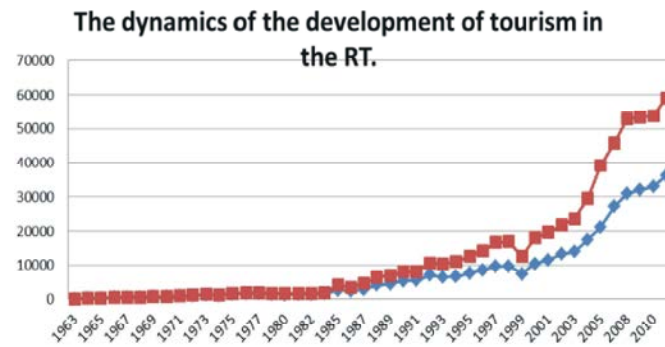


Fig. 4: The dynamics of the development of tourism in the RT in 1963-2011

■ Tourists ■ Revenues from tourism

* According to statistics [18-29]

Table 1: The dynamics of the development of tourism in the Republic of Turkey

Years	Tourists (thsd.ppl.)	Change in the number of tourists %	The revenue from tourism (mln.,\$)	Change of the revenue from tourism %	The revenue from tourism in GDP %	Avg. expenses of one tourist \$
1963	198	-	7,7	-	0,1	39
1964	229	15,7	8,3	14,3	0,1	36
1965	361	57,6	13,8	62,5	0,2	38
1966	449	24,4	12,1	-7,7	0,1	27
1967	574	27,8	13,2	8,3	0,1	23
1968	602	4,9	24,1	84,6	0,2	40
1969	694	15,3	36,6	50	0,3	53
1970	724	4,3	51,6	41,7	0,5	71
1971	926	27,9	62,9	21,6	0,5	68
1972	1034	11,7	103,7	66,1	0,6	100
1973	1341	29,7	171,5	66	0,8	128
1974	1110	-17,2	193,7	12,9	0,6	175
1975	1540	38,7	200,9	3,6	0,5	130
1976	1675	8,8	180,5	-10	0,4	108
1977	1661	-0,8	204,9	13,3	0,4	123
1979	1523	-7,4	280,7	21,7	0,5	184
1980	1288	-15,4	326,7	16,4	0,6	254
1981	1405	9,1	381,3	16,9	0,8	271
1982	1391	-1	370,3	-2,9	0,7	266
1983	1625	16,8	411,1	11,1	0,8	253
1985	2614	23,5	1482	76,4	2,8	567
1986	2391	-8,5	1215	-18	2,1	508
1987	2855	19,4	1721	41,6	2	603
1988	4172	46,1	2355	36,8	2,6	565
1989	4459	6,9	2556	8,5	2,3	573
1990	5359	20,9	2705	5,8	2,1	505
1991	5517	2,4	2654	-1,9	1,8	481
1992	7076	28,3	3639	37,1	2,3	514
1993	6500	-8,1	3959	8,8	2,2	609
1994	6670	2,6	4321	9,1	3,3	648
1995	7726	15,8	4957	14,7	2,9	642
1996	8614	11,5	5650	13,9	3	656
1997	9689	13	7008	23,9	3,6	723
1998	9752	0,6	7177	2,4	3,5	736

Table 1: Continued

1999	7464	-23,4	5193	-27,64	2,8	696
2000	10412	39	7636	47	3,8	733
2001	11569	11	8090	5,9	5,62	699
2002	13247	14,5	8481	4,7	4,67	640
2003	14030	5,30	9676	14,1	4,42	693
2004	17517	24,86	12125	25,3	4,13	705
2005	21124	11	18153	13,72	5,0	752
2007	27215	14,9	18 487	8,9	2,8	728
2008	30 979	12,83	21 950	15,8	3	709
2009	32 006	2,81	21 249	-3,3	3,4	664
2010	33 027	3	20 806	4,9	2,6	618
2011	36 151	8,6	23 020	9,6	-	637

* According to statistics [18-29]

of the infrastructure including roads and sewage system, closely cooperating with the ministry in financing of the sector and creating infrastructure [10]. According to many tourismologists the functions of control of the development of the regional infrastructure form the part of “Betuyab” was correct, “if there was no reliable mechanism of control many entrepreneurs would have ignored the land use rules” [11].

The Experience of Turkey and Kazakhstan: Speaking about the success of Turkey in tourism it is accepted most often to refer to the peculiarities of the geographic location as well as cultural and historical characteristics of this country. However, the analysis of the history of tourism in Turkey shows that the main merit in creation of powerful tourism industry belongs mainly to the government of Turkey that has been laboriously working for a long time on stimulation and support of the tourism industry in the country. Since the middle of last century to the present time Turkey has been going through a difficult period of formation, development and prosperity of tourism. Today it is one of the world tourism giants accepting annually up to 35 million tourists.

Kazakhstan, compared to Turkey, does not have so many historical or cultural points of interest but from the point of view of the natural landscape and geographical peculiarities our country is also unique. The huge potential of the tourism industry in Kazakhstan is recognized by all – government officials, experts and foreign guests. Studies show that Kazakhstan is in the center of the world’s growing market of outbound tourism. According to various experts estimations, China, Russia, India and the Middle East by 2020 will give the increase of over 200 million outbound tourists annually.

In order to use the existing potential correctly it is important for Kazakhstan to build an effective economic

policy that is based on a scientific approach and takes into consideration the real situation and experience of other countries. The level of the development of tourism in Kazakhstan is similar to the one of Turkey in the 60-70-ies. The common characteristic of both countries is the fact that the authorities of the country fully understood the possibilities given by tourism and began to accent the development of this industry in their speeches. However, the economic potential of Turkey at that moment was limited that is why the plans of the government were not always supported by the necessary resources. Due to the lack of budget funds and investment the government of Turkey was forced to define priority areas for the tourism industry (the coast from the province of Balikesir to the province of Antalya). These provinces were especially emphasized by the Turkish government while attracting the investments.

A similar situation exists in the tourist industry of Kazakhstan now. The government of the country identified the key projects of the international level which will be the basis of separate system plans of development. These are Shuchinsk-Bohr resort area, the area of ski resorts near Almaty region and the marine recreation resort area Kenderli. The next level includes regional projects oriented toward domestic tourism. It includes Alakol, Balkhash, Bayanaul, Turkestan and other. For each of these resorts the government of the country is going to make the plan of development that takes into consideration infrastructure demands, economic, environmental and social positions.

CONCLUSION

The example of Turkey clearly demonstrates the fact that the transformation of tourism into a powerful industry requires from the state, first of all, systematic

measures on the level of economic stimulation, investment attraction and the creation of a favorable business climate. In Kazakhstan they only start to raise the question of expanding the state support of the tourism sector, however, there has been no real steps in this direction so far. The speak only about the identifying of the model of state and private partnership that will take into consideration the questions of land tenure, access to the infrastructure and state support measures. It turns out that Kazakhstan is at the stage of searching for the effective models of stimulating the tourism industry. The orientation toward Turkey in this question greatly facilitates the Kazakh governmental tasks because the tourism history of Turkey is a ready guide to action.

However, it seems that the direct copying of the Turkish policy by Kazakhstan will be not really effective because there is regional, geographic, demographic and socio-economic specifics that cannot be overlooked in the realization of the tourism development strategy.

In the medium term the main directions in the tourism market of the country will be outbound and inbound tourism, while inbound tourism will remain the problematic sector of the industry.

The underdevelopment of small business, the lack of investments, weak infrastructure, the low level of service, the underdeveloped network of accommodation facilities, the corruption and inefficiency of the authorities will remain the main obstacles in the industry. One can also predict the continuation of the imbalance in the development of the tourist industry that is expressed in the concentration of tourist agencies in major cities and the backwardness of the regions.

The question about the measures that should be taken to improve the situation in the tourism market remains open. Before the end of the year the government must present a new program of the tourism industry development on the contents and effectiveness of which the future of tourism in Kazakhstan will depend. A possible positive effect is expected in connection with the realization in the country of major economic projects such as FIID, "The Roadmap-2020" and "Western China – Western Europe". First of all, the above-mentioned programs should contribute to the solution of the problem of the road network development.

In general, the main condition of the successful policy of the state is to maintain continuity and the strategic vision at all stages of its realization. Only in this way it is possible to make a quality leap to the formation of a highly effective and competitive tourist complex.

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