

# Istanbul Kadıköy Nightlife Cluster

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## Overview

Over the last decade, the nightlife industry has become an important field in Turkey's economy and culture. Nightlife is a collective term for entertainment that is available and generally more popular from the late evening into the early hours of the morning, in bars, restaurants, theatres, cinemas, music and concerts<sup>1</sup>. As such, nightlife is considered to be an important attraction all around the world especially for people who want to socialize, party and go out, to get out of their work routine, to reduce their stress level as well as to make some friends and memories. As a result, while they can be unique, interesting or even shocking places, nightlife areas of cities may tell a lot about the city itself more than all of the cultural activities combined can. According to sociologists, the development of nightlife in a country is also an indication of the development of that city's cultural and political progress<sup>2</sup>. Likewise, the economic growth and increase in prosperity of a country nurture the variety of players in the nightlife industry<sup>3</sup> and, such as in the case of Turkey, has a huge positive effect on the country's recognition<sup>4</sup>. Turkey's high urbanization rate and young population coupled with a wide and diverse range of nightlife entertainment activities contribute to the popularity of its nightlife scene<sup>5</sup>. It is no wonder that in 2012 the country's most populous city, Istanbul, was reported to be one of the top 15 cities of the world with the craziest nightlife<sup>6</sup>. One of such locations famous for its nightlife in Istanbul is the Caferağa neighborhood in the Kadıköy district, located in the Asian part of the city (see **Exhibits 1-3** for maps of Turkey, Istanbul and Kadıköy).

Kadıköy is an attractive and modern district with open-minded and modern thinking inhabitants, and, due to its cultural heritage, high diversity and geographical location it is known as the cultural center of the city's Asian side. The nightlife industry in the Kadıköy Bar Street started around 1994 with the establishment of bars followed by cafes and restaurants. In 2000, the municipality decided to limit the opening of new bars in the area. It is reported that the nightlife industry in Kadıköy had its golden years between 2000 and 2008 when the area reached its peak with high revenues, number of customers and popularity. However, after 2008 revenues started to decrease due to various issues mostly related to the political and economic conditions of Turkey.

## Country Analysis

The Republic of Turkey is located in the South-Eastern Europe and South-Western Asia on a total surface area of 783,562 km<sup>2</sup>. It is the only country situated in both Europe and Asia, bordering Bulgaria, Greece, Iran, Iraq, Syria, Azerbaijan, Georgia and Armenia (see **Exhibit 1**). Turkey has a total population exceeding 80 million with 43.15% of people between the ages of 25-54 and a median age of 31<sup>7</sup>. The country's population has increased beyond expectations during the 2015 and 2016<sup>8</sup> due to migrations from Syria and other neighboring countries. As of 2017, the urban population represents 72.3% of the total population<sup>9</sup> and Istanbul is the most crowded city with 14.80 million inhabitants<sup>10</sup>.

Turkey is home to various cultures as well as religious and ethnic groups like Muslims, Christians, Jews, Kurds, Tatars, Zazas and more. The country is a candidate for the European Union (EU) membership since 1999, and currently a member of NATO and G20<sup>11</sup>. Following two elections in 2015 as well as a referendum in 2017, Turkey is ruled by Recep Tayyip Erdogan's Islamic party AKP (Justice and Development Party). In past years, Turkey has had some serious political problems due to both internal as well as external unrest at its southeastern borders. For instance, there has been a conflict with Russia in November 2015 due to the shooting down of a military jet, a coup attempt on 15<sup>th</sup> July 2016, and several terrorist attacks by Kurdish worker's party (PKK) and Islamic State in Iraq and Syria (ISIS) coupled with intensified violence between the security forces and militants, leading to unstable political circumstances<sup>12</sup>, as well as the rapid deterioration of the tourism sector among others<sup>13</sup>.

On the other hand, Statistic Times (2016) ranked Turkey as the 17<sup>th</sup> largest economy in the world with a gross domestic product (GDP) of 857 billion USD<sup>5</sup>, a GDP per capita of 10,807 USD<sup>5</sup> and an annual growth of 4.0%<sup>14</sup>, with the majority of the population belonging to middle-income class<sup>15</sup>. The country's GDP consists of services

(64.3%), industry (27.1%) and agriculture (8.6%)<sup>16</sup>. Tourism is of major importance in the economy generating 5% of the GDP<sup>17</sup> as the total number of foreign visitors exceeded 25 million in 2016 and close to 9 million tourists arrived until the end of May 2017<sup>18</sup>.

However, in the first half of 2016, GDP growth declined to 3.7% and the country experienced a serious depreciation of its currency leading to economic instability<sup>19</sup>. For instance, the exchange rate of Turkish Lira (TRY) against USD was around 2.95 in June 2016, and 3.54 in December 2016, and 3.78 in February 2017<sup>20</sup>. Turkey has a relatively high unemployment rate, which increased from 10.4 % in 2015 to 12.7 % in December 2016<sup>21</sup>. This rate is even higher for young people, as the unemployment rate of those between the ages of 15-24 is approaching 24% as of December 2016<sup>22</sup>.

Turkey ranks 55<sup>th</sup> among 140 countries in the Global Competitiveness Index 2016-2017 by The World Economic Forum, showing a drop from its earlier rank of 45<sup>th</sup> (out of 144 countries) in 2014<sup>15</sup>. On the other hand, within the recent years a lot of investment went in to improve the country's infrastructure especially in the western parts, through upgraded roads, new bridges, seaports and the world's largest airport to be opened in 2018<sup>5,23</sup>. Moreover, Turkey has the 3<sup>rd</sup> largest labor force market in Europe with around 29.7 million people<sup>5</sup>, yet the amount and the quality of the education level of the work force are reported to be relatively low even though there is an effort to improve the country's education policy with an increasing percentage of GDP spent on education<sup>24,25</sup>. Other competitive disadvantages are identified as access to financing, inefficient government bureaucracy, less transparent tax regulations and corruption<sup>16</sup>. Nevertheless, the country's high population growth and its young population makes it a relatively attractive market and is ranked 55<sup>th</sup> out of 136 countries in the Global Opportunity Index and 69<sup>th</sup> out of 190 in the "Ease of Doing Business Index"<sup>26</sup>. Turkey is home to several clusters, with the highest employment in textile, apparel, construction, automotive, logistics, processed food, and tourism and hospitality<sup>27</sup>.

## Istanbul

Istanbul is the largest metropolitan city in Turkey and the fifth largest in the world, with a population approaching 15 million<sup>28</sup> while the unofficial number is estimated to be close to 20 million, i.e. representing almost 25% of the entire country's population. Istanbul's unique location connecting Europe and Asia spans a total area of 5,461 km<sup>2</sup> with 39 districts and 936 neighborhoods<sup>29</sup>. Istanbul's GDP is 285 billion USD, which equals to almost 30.5% of Turkey's total GDP, representing an economy larger than 25 European countries<sup>21,30</sup>. Moreover, the city serves as the engine for economic growth of the entire country as its GDP per capita in 2014 was around 19,945 USD, much higher than the country's average. Around 20% of Turkey's industrial labor lives in Istanbul and the city is home to many manufacturing plants as well as different clusters, including food and beverage, automotive, electrical equipment, textiles, logistics and tourism<sup>31</sup>.

In order to support the growth of the city and make it more attractive for foreign investments, the government puts special emphasis on further expanding Istanbul with major infrastructure projects such as the third airport, a new bridge over the Bosphorus, Marmaray – the undersea tunnel, Canal Istanbul bypassing the Bosphorus, new metro lines and Galataport aiming to reduce the traffic density and increase labor productivity<sup>32</sup>. Istanbul's international trade volume accounts for 195 billion USD<sup>33</sup> and the city is among the top 10 major European cities of the future in terms of business friendliness and economic potential<sup>34</sup>. This also explains the 22,000 international companies that are currently operating in the city<sup>35</sup>. Moreover, it is projected that by 2030 Istanbul will be one of the top 20 cities with the highest increase in income and consumer spending<sup>36</sup>.

Due to its advantageous location for trade and transport, its historical identity with the first settlements dating back more than 300,000 years ago, and its 1,600 years of history with the Roman, Byzantium, Latin and Ottoman Empires, Istanbul is currently an attractive destination for tourists throughout the year. The occupation of all those different empires underlines the attractiveness of the city and explains its cultural richness and diversity<sup>37</sup>. According to the Global Destination Cities Index, Istanbul was in top five fastest growing destination cities between 2009-2015 among 132 cities<sup>38</sup> and is identified as the fastest growing destination city in Europe by international overnight visitors. Although there was a decline in the number of tourists from 12.4 million in 2015 to 9.2 million in 2016<sup>39</sup>, Istanbul was the city receiving the highest number of foreigners in Turkey within the first 5 months of 2017 (see **Exhibit 4**). Furthermore, Istanbul is among the top 15 cities with the craziest nightlife in the world by the Cities Journal<sup>6</sup>, which is attributed to the diversity of its international visitors and the city's young population with a median age of 31.9<sup>28</sup>.

## Kadıköy

Kadıköy Nightlife Cluster is situated in Kadıköy, one of the most important and largest districts, located on the Asian side of the city (see **Exhibit 3**). Surrounded by Marmara Sea and bordering Üsküdar, Maltepe and Ataşehir districts<sup>40</sup>, densely populated Kadıköy is home to a young population due to the district's modern look as well as

the cultural heritage, diversity, and geographical location<sup>41</sup>. There are 21 neighborhoods with 452,302 inhabitants as of 2016<sup>42</sup>, living on a surface area of 25 km<sup>2</sup><sup>28</sup> and the district attracts visitors for mainly its shopping areas, Fenerbahçe Stadium and universities<sup>40</sup>.

Kadıköy is considered to be one of the cultural centers of Istanbul, known for its cultural, ethnical, linguistic and societal diversity with numerous bars, cinemas, churches and mosques (see **Exhibit 5**). The district is recognized to have a unique culture emphasizing the “living together with diversity”<sup>41</sup>. Since mid-1990s Kadıköy’s municipality is governed by CHP, the Republican People’s Party, which has supported the growth and development of leisure and shopping areas in the district through a quite liberal attitude emphasized in its mission statement: “Active, innovative, modern, friendly, egalitarian, libertarian; a municipality that provides services and sustainability to environment within its authority & responsibility in order to create a strong society and environment for all individuals”<sup>42</sup>. Moreover, the strong supervision and control of the municipality is a plus for Kadıköy as the district is acknowledged to be a safer area compared to other areas in Istanbul.

The economy of Kadıköy is mainly based on sectors like trade, entertainment, tourism, education and transportation. As of 2014 there are 54,127 work places in the district and Kadıköy Bazaar, Altiyol, Bahariye and Baghdad streets are renowned retail centers as well as cafes, bars and restaurants<sup>40</sup>. The district’s economy is mainly supported by a well-developed public transportation with wide range of opportunities, with Metrobus (rapid transit bus) and Metro (rapid transit railway) systems, as well as regular busses, Marmaray (underwater tunnel), hydrofoil and ferry ports.

Kadıköy is home to several educational institutions, including 3 universities, 45 high schools, 58 secondary schools and 54 primary schools<sup>40</sup>. As a result, Kadıköy’s education and literacy rates are higher than most areas in Turkey, with 6.99% of the population having master’s and doctoral degrees, 8.73% having a college and undergraduate degree and 31.18% having a junior high school and high school degree<sup>43</sup>. Moreover, the presence of universities is an important driver for the district’s economic growth.

### **Kadıköy Nightlife Cluster**

Kadıköy Nightlife Cluster is situated in the Caferağa neighborhood of Kadıköy, the second densest region in the district with a total of 4,701 workplaces and although the exact number cannot be delivered, it is estimated by current bar and restaurant owners in the cluster that there are around 2,000 bars and restaurants within Kadıköy district. Around 60% of this number reportedly consists of restaurants and cafes, and the remaining 40% are bars (see **Exhibit 6**). The clientele in the district, which has always been associated with a modern, educated, open and western-oriented culture, is known to be quite demanding. This in turn requires companies to offer good quality service and products and enhances the overall performance and quality of the cluster.

The Kadıköy Nightlife Cluster consists of bars and restaurants with some supporting and related industries and institutions. As can be seen from the cluster map (see **Exhibit 7**), the main actors are various types of bars and restaurants. There are currently 53 bars on Kadife and Bar Streets and following the municipality’s banning of new bars on both streets, new entrants started spreading to nearby streets, and their numbers are increasing every day. Bars in the region are generally 90% full on Fridays and Saturdays, and 40% full on the other days of the week. The number of customers starts to increase after 19:00 and the bars generally close at 02:00. On the other hand, restaurants are frequented by students and businesspeople during noon and afternoon, and the number of customers peak at the evening during dinner time. There are a large variety of restaurants including traditional Turkish cuisine, fish, meat and fast food restaurants, soup places, ice cream and waffle shops, etc.

There is a close collaboration and cooperation among the owners of the bars and restaurants as well as with the municipality and other institutions. For instance, regular meetings are organized in order to exchange ideas and to increase the ability to solve cluster specific problems. On the other hand, the large number of actors means there is an intense competition. The competition became even more intense with the increasing relocation of new bars and restaurants to Kadıköy from the competing cluster Asmalimescit situated in the Beyoğlu district. As the latest terrorist attacks caused a decline in customers and sales in the European side of Istanbul, many Asmalimescit bars and restaurants started to look for space in Kadıköy. In order to avoid direct competition, most bars and restaurants in the cluster aim to differentiate their services. For instance, there is a wide variety of bars such as taverns, traditional Turkish night clubs, live music bars, hookah bars, rock-bars, folk music bars and the like, trying to attract different age groups with different tastes.

Alcoholic beverage suppliers, food and ingredients suppliers, along with furniture, kitchen equipment and utensils suppliers provide materials and equipment that bars and restaurants need on a daily basis. Especially important are the strong ties with well-known local alcoholic beverage suppliers with production facilities in Istanbul or in the nearby city of Tekirdağ. Likewise, food suppliers hail mostly from the southern parts of Turkey and dried nuts and fruits suppliers are generally from the Black Sea region of the country. In terms of furniture, kitchen equipment and utensil suppliers, Istanbul offers a high variety and numerous alternatives that in turn help cluster companies regarding convenience, flexibility and affordability. The presence of these suppliers along with the central and convenient location of the cluster, are seen as an important advantage due to short lead times and

low transportation costs.

Furthermore, there are specialized financing services provided by the banks in the area, crucial for the bars and restaurants especially in their first years of establishment. For instance, a relatively high amount of initial investment is needed to rent a place, furnish and design it around a certain concept, set a menu and keep the needed amount of supplies in order to provide a high-quality service and to build a good image. Moreover, at the first stage, the recognition of the bar or restaurant will be low and the business will lie heavily on the financing provided by the banks until it becomes more established and acquires its own customer base. Another important supporting industry consists of IT suppliers as IT hardware and software are widely used in recording and keeping track of the orders and directing them.

Agriculture and food processing are also related industries to the Kadıköy Nightlife Cluster as they produce the materials used in preparing the foods and beverages served in bars and restaurants. Agriculture industry provides the vegetables, fruits, meat, fish and poultry products whereas food processing industry provides processed materials such as canned goods, dairy products, buns and salted nuts. Although all of these companies are not located in Kadıköy, there are many food processing and agriculture companies in Istanbul and can serve the cluster easily due to its convenient location and transport facilities. Body art industry, including tattoo and piercing studios is another related industry as the customers generally have tattoos or piercings and it is a frequent occasion that people drinking excessively in the bars go to these studios. It is reported that there are around 15 of these tattoo shops in the area. Moreover, Kadıköy is one of the cultural centers of Istanbul with a high number of cinemas, theatres, operas, dance studios, art galleries and concert halls (see **Exhibit 5**) having a direct impact on the number of customers and thus revenues of the cluster. Furthermore, the shopping and leisure areas in the neighboring districts as well as universities, high schools and various sport clubs also attract people to the area.

In Kadıköy, the Municipality is the primary institution for collaboration as the rules and restrictions established by this organization directly affect the condition and the performance of the Kadıköy Nightlife Cluster. Besides granting the necessary permits and licenses, the municipality also determines the number of bars and restaurants that can be opened, the number of tables and chairs that can be placed on the sidewalk, the kind of beverages that can be sold and the operating hours. In order to discuss issues pertaining to the cluster, bar and restaurant owners are reported to hold meetings with the municipality every 2 to 3 months, though these aren't scheduled on a periodic basis. In Kadıköy, the municipality plays an active role in listening to all parties in the cluster and finding solutions to problems as soon as possible. The most frequently reported problems are residents' complaints about high music volume, noisy customers, and drinking and smoking on the streets.

Furthermore, educational institutions in Istanbul such as MSA (Culinary Arts Academy) and Bilgi University among others, offer training programs as well as licenses for restaurant chefs and bartenders who can then work in the cluster. However, as these institutions are not located in the area, they do not provide specific programs directly targeting the cluster, nor have they any direct relation or collaboration with its actors. As a result, they do not have a significant impact on the quality and variety of the services offered by the cluster. As a result, it is reported that there is no significant effort to conduct Research and Development (R&D) activities nor differentiate the products, services or production equipment in the sector.

Lastly, several NGOs in the area (Moda Volunteers Association, "A Livable Moda", Association of Entertainment Venues in Moda, Association of Bartenders, etc.) support the cluster, arrange gatherings to discuss the problems of the players in the cluster, brainstorm on possible solutions and communicate these problems and recommendations to the authorities in a more organized manner. At the end of the day, a positive business environment along with high levels of communication and collaboration can be observed among the various actors and that in turn helps to solve cluster specific problems.

On the other hand, accessibility is a very important factor in the success of the Kadıköy Nightlife Cluster, as the wide network of transportation services makes it very easy for customers to come to the area. However, as most of the transportation facilities do not operate after 12 am except on the weekends, there are some problems for those customers to go back home. Because there is usually a lot of traffic in the area and not enough parking spots when people come with their own cars<sup>40</sup>. Moreover, it is reported by some bar owners that due to the developed transportation system people from far away –and in most of the cases less elite- districts of Istanbul come to Kadıköy and disturb the regular clientele of the bars and restaurants and make them feel uncomfortable. As a result, people who are used to the old liberal and elite environment that was once offered in Kadıköy are not very happy with the newcomers and began to go to other places or remain home. Thereby, it can be said that the established transportation network around Kadıköy is a determinant of the success of the Kadıköy Nightlife Cluster, and it has both positive and negative effects on its performance.

## Competition

Turkey, being an important touristic destination in the world and home to a young and increasing population, offers a wide range of nightlife activities mostly located in the coastal parts of the country. For instance, on average 4.2% of the monthly consumption is made for alcoholic beverages, cigarette and tobacco; 2.9% for entertainment and

culture, and 6.4% for restaurant and hotels<sup>22</sup>. Moreover, Istanbul is a very famous for its nightlife and nightlife entertainment possibilities offered are among the top reasons for visiting the city<sup>43</sup>. Besides Kadıköy, Asmalimescit, Karaköy, as well as the Bosphorus coastline with Kuruçeşme, Bebek and Arnavutköy are renown nightlife areas (see **Exhibit 8** for a map).

However, as the Bosphorus coastline is comprised of high scale and expensive places with a limited capacity, they cannot be considered as clusters and only Asmalimescit and Karaköy can be identified as the main competitors of Kadıköy. Both are located on the European side of the city, close to the old city center and many touristic areas as well as the famous Beyoğlu and Taksim neighborhoods. They are easily accessible by public transportation and are very short distance from hotels, concert halls, cinemas, theatres, libraries, museums, galleries and shopping areas. Karaköy can be identified as an emerging cluster as it is quite new with still a limited number of bars, cafes and restaurants. On the other hand, Asmalimescit is older and more established as it has been a tourism destination since 1980s, and with its golden years between 2003 and 2012. However, due to strict regulations after the Gezi protests in 2013, the municipality banned bars and restaurants to place tables outside, and lately due to terrorist attacks in the area, the number of customers as well as the cluster's revenues have decreased drastically. Recently, bar and restaurant owners started to organize regular meetings with the municipality of Beyoğlu to improve the situation and revive the cluster. However, Asmalimescit experiences major challenges due to high rental costs, security issues and problems associated with finding qualified and reliable personnel.

## Challenges

According to the bar and restaurant owners in the region, as previously indicated, the nightlife industry in Kadıköy had its golden years between 2000 and 2008 when the area was extremely popular and had experienced the highest number of customers and revenues. However, after 2008 sales started to decrease due to various issues.

The smoking ban, which passed in 2008, prohibited people from smoking indoors, and as a result most bars and restaurants had to impose restrictions on their smoking customers. They started to rely more heavily on outdoor spaces such as doorsteps or gardens, and started to expand to the streets; and that in turn caused problems with the municipality who claimed the streets as public areas. Moreover, as loud noises from music and customers occur especially in the outdoor spaces of bars and restaurants, local residents started to complain to the municipality about the issue. Furthermore, since the governing party AKP (Justice and Development Party) known to be religious and therefore strict towards drinking and smoking, came into power in 2002 there have been several adjustments in tobacco and alcoholic beverage taxes. The special consumption tax (OTV), as well as the lump-sum tax and health tax, kept on increasing throughout the years. For instance, between 2002 and 2010 the total tax burden on beer increased by 737% and these increases are expected to continue in the following years with the latest one announced on December 2016<sup>44,45</sup>. These adjustments affected alcohol sales negatively, as customers started to drink less due to increased costs. Another issue related to increased alcohol prices was the emergence of the black market and contraband sales. As prices are much lower in the neighboring countries such as Bulgaria, Greece and Cyprus, illegal alcohol transportation and consumption has also become an important problem in the country<sup>35</sup>.

An additional point was the strengthening of the present government and although the municipality of Kadıköy is run by CHP (Republican People's Party), a socially more liberal party, it doesn't have much room to maneuver regarding the nightlife industry. Moreover, the increasing religious tension among the Turkish population and the emerging religious groups<sup>46</sup>, together with the latest political and economic problems in the country had a negative effect on the entertainment sector. Following the Gezi protests in 2013, terrorist attacks in Istanbul and around the country in 2015, and the military coup attempt in 2016, many industries were hit hard as the number of tourists dropped sharply and local people started to spend less for leisure and entertainment and were more reluctant to go out. Respectively the Kadıköy Nightlife Cluster has been subject to a severe performance drop in terms of the number of customers as well as revenues since 2008. For example, due to reduced numbers of customers, just in 2016 an average bar suffered revenue losses of around 20-25%.

On the other hand, the Turkish nightlife industry is known to be quite seasonal. The season usually starts in March and lasts till the end of October while the climate is still warm. This leads to lower revenues in the winter as well as difficulties with retaining qualified employees. Talent attractiveness is already a major problem for bars because being a bartender is not considered as a prestigious, lifetime job. Thus, people prefer to be a bartender when they are still young and/or studying, and they tend to look for another job after graduation. Although a bartender usually earns a decent sum of money especially due to tips, most of them do not consider this job as a permanent occupation and this makes it difficult for bar owners to find qualified and experienced bartenders.

## Epilogue

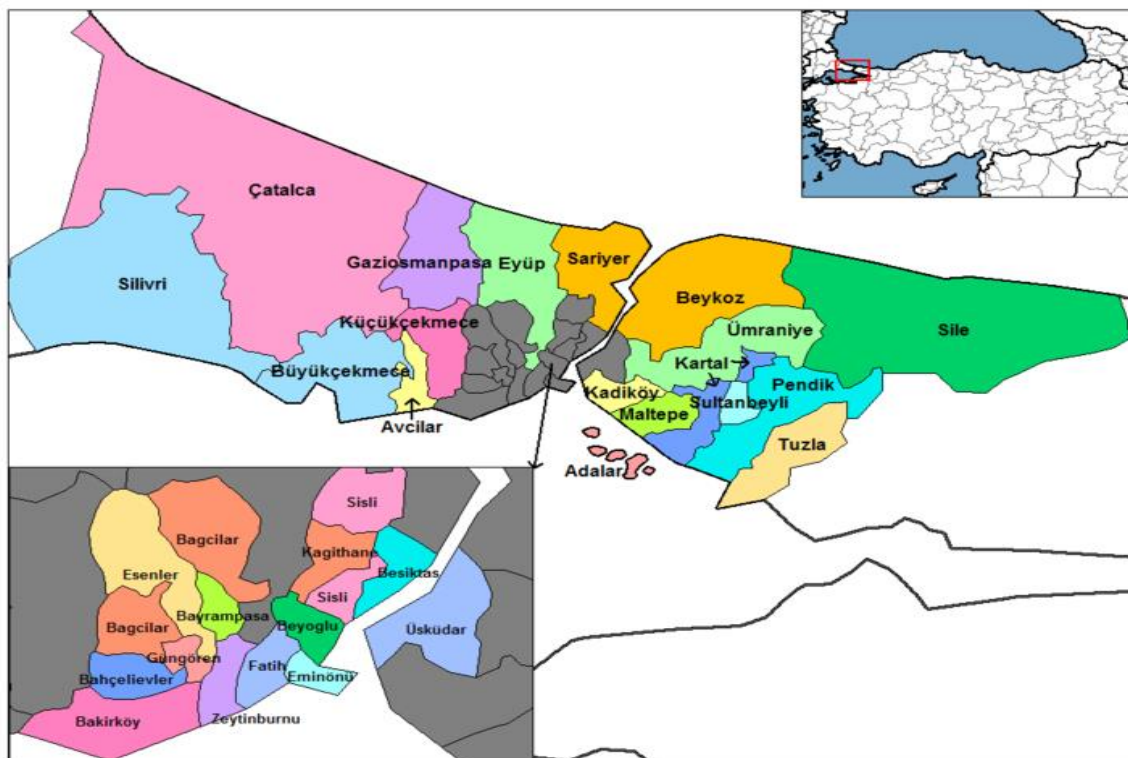
In this case, the nightlife cluster located in the Kadıköy district of Istanbul is analyzed and its current challenges

are evaluated. Turkey is a dynamic country with its young and growing population and tourism industry is especially important in its economy. As a prominent metropolis, Istanbul has a high reputation for its nightlife industry generating ca. 4 million USD per night<sup>47</sup>, and the cluster in Kadıköy is quite well known for its diversity and cultural heritage. However, the ongoing political and economic crisis, fear of terrorist attacks, religious tensions, and high tax rates hit the area hard, and subsequently the Kadıköy Nightlife Cluster's performance began to decline. Thus, there is an urgent need to implement some precautions before the situation turns any worse.

Exhibit 1. Map of Turkey<sup>48</sup>



Exhibit 2. Map of Istanbul's districts<sup>49</sup>

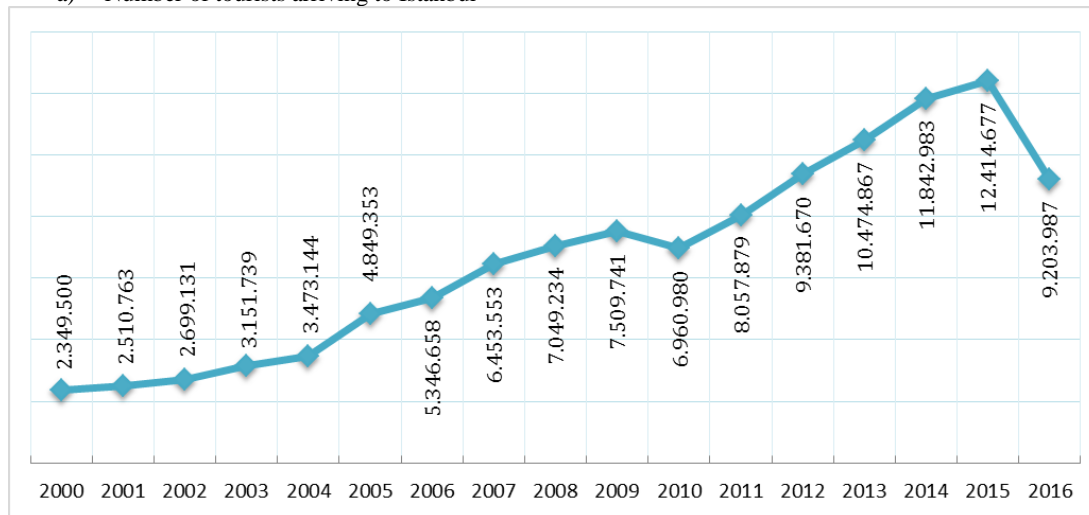


**Exhibit 3.** Map of Kadıköy's neighborhoods<sup>50</sup>

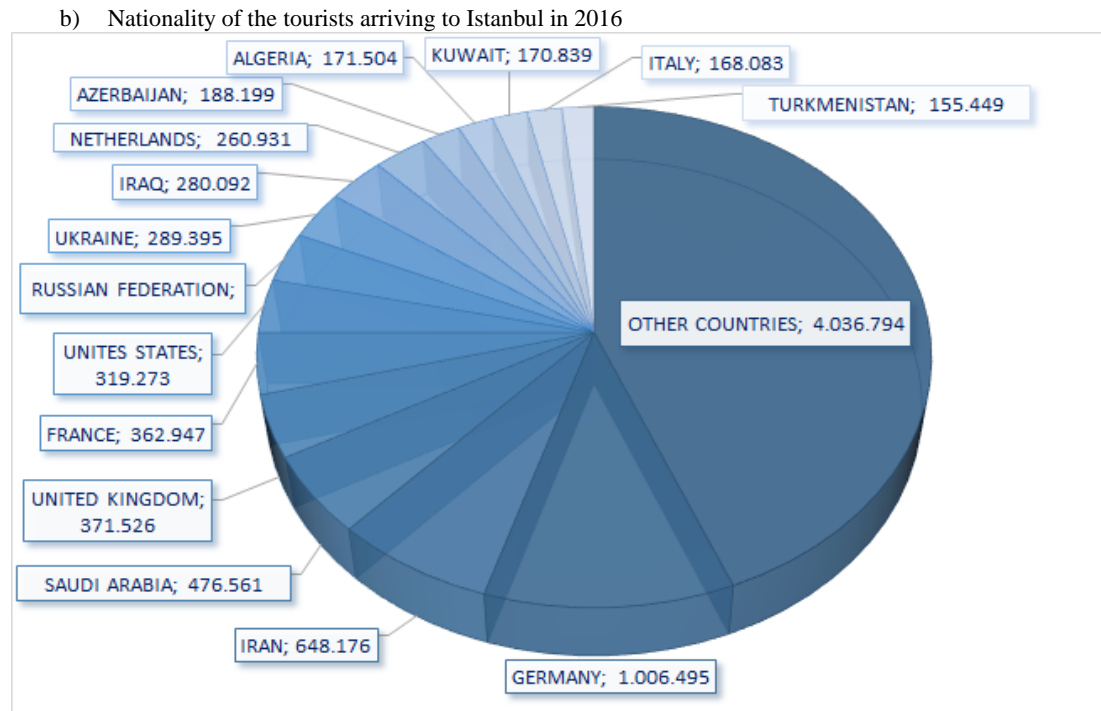


**Exhibit 4.** Istanbul Tourism Statistics<sup>51</sup>

a) Number of tourists arriving to Istanbul







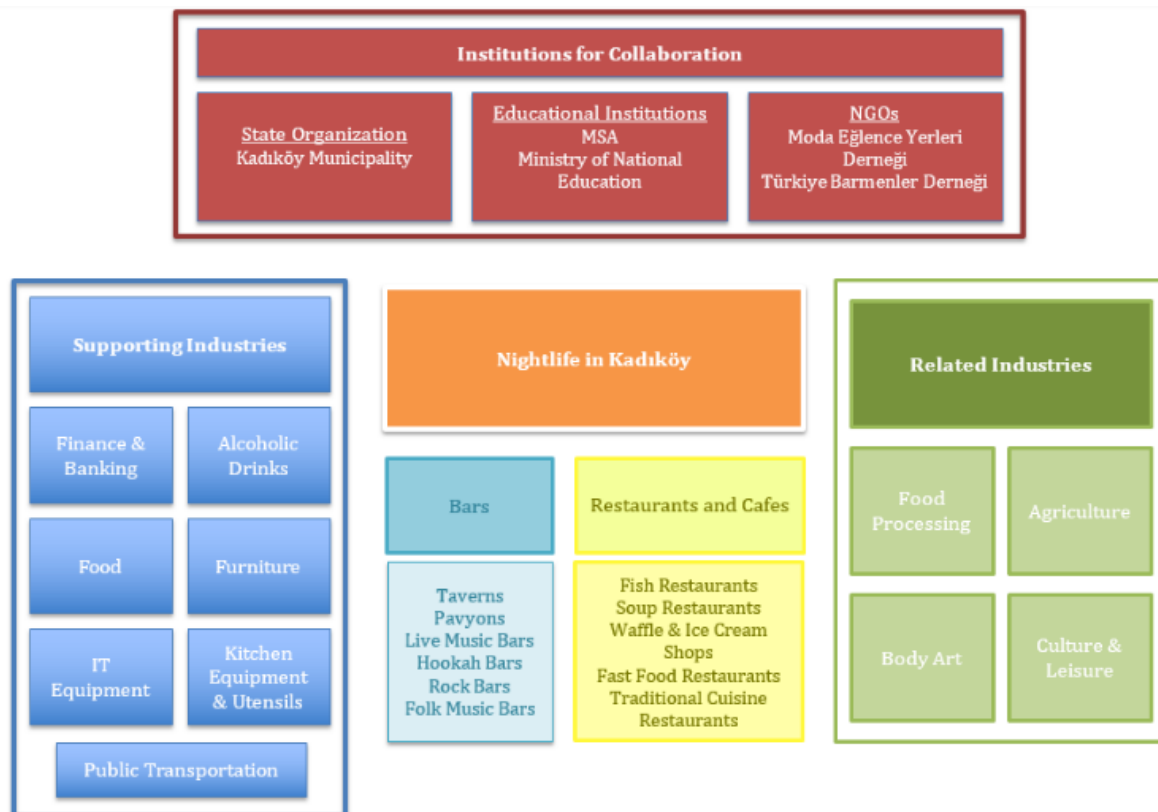
**Exhibit 5.** Number of various institutions in Kadıköy<sup>41</sup>

Type of cultural institution	Presence in numbers
Cinema	16
Theatre	~30
Opera	1
Culture Centre	5
Church	13
Mosque	11
Library	4

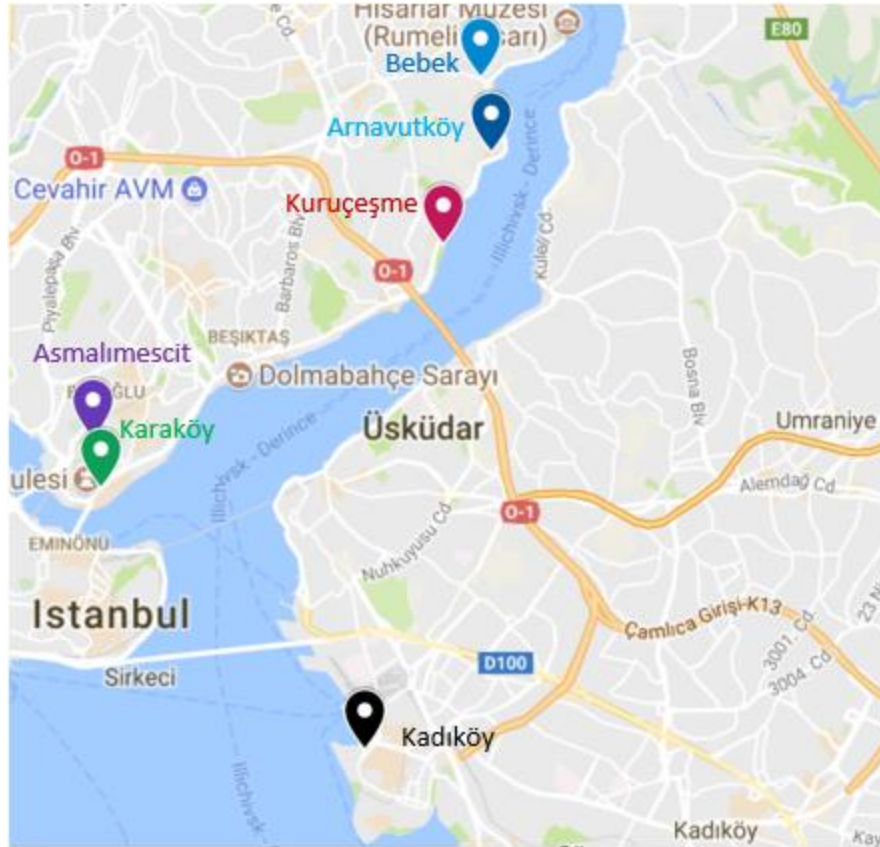
**Exhibit 6.** Photos from Kadıköy Nightlife Cluster<sup>52, 53, 54</sup>



**Exhibit 7.** Kadıköy Nightlife Cluster map



**Exhibit 8.** Various nightlife areas in Istanbul



## Endnotes

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