

Case

## It's time for the wind to blow for Alaçatı

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### Abstract

Alaçatı, a small village located on the Aegean Sea in Western Turkey, has become a popular holiday destination in the country within the recent years. The purpose of this case is to introduce the Alaçatı tourism cluster with its actors and assess its current situation. On the other hand, the study also evaluates the current condition of the tourism industry in Turkey and identifies its challenges with respect to recent political and economical developments in the country as well as the Covid-19 pandemic.

**Keywords:** Turkey, Alaçatı, tourism industry, tourism cluster

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Alaçatı, a small village located at the Karaburun peninsula on the Aegean Sea in Western Turkey, has become a favorite holiday destination within the recent years. Renowned for its suitable weather conditions for windsurfers, its popularity has increased especially among young people. Alaçatı tourism cluster is home to many boutique hotels, restaurants, bars, beaches, and other tourist attractions, appealing to mostly domestic as well as international visitors. However, Alaçatı's well-being is very much dependent on the overall conditions of Turkey's tourism industry and the country's economy.

Turkey, home to several civilizations throughout centuries, is among the most visited countries in the world. In 2019, it ranked as the 6th top tourism destination globally, generating ca. 3.8% of its income from the tourism industry<sup>1,2</sup>. The country has many endowments including its historical heritage, geographical location, a climate allowing four seasons, beautiful coastline, and fertile lands. Thus, it is widely acknowledged that Turkey has a high potential for further growth in the tourism sector, and the productive use of those endowments with the support of government and related industries can improve the competitiveness of its tourism cluster; helping with the development and prosperity of the country. However, it is also noted that in order to improve its attractiveness, the country has to solve problems related to safety and security, environmental sustainability as well as issues related to its human resources and the labor market, to be able to provide a high quality of service for people who prefer to visit Turkey during their holidays.

On the other hand the newly recovered tourism industry, after 2 years of decreased revenues in 2016 and 2017, is now facing a huge challenge due to the Covid-19 pandemic and tourism is expected to be among the hardest hit industries in the country. As of March 2020, in line with global precautions for Covid-19, the majority of countries including Turkey, closed their borders and imposed travel bans. These in turn are expected to cause a colossal decline in international tourist arrivals, estimated to be not less than 20% - 30% in 2020<sup>3</sup>. In the case of Turkey, it is estimated that the industry will shrink by 80% due to the bans on both domestic and international flights, closure of hotels, cancellations of reservations and the overall uncertainty of the process. For instance, the major air carrier

of the country, Turkish Airlines with the largest coverage worldwide had to ground the majority of its planes due to the pandemic.

## Turkey

Turkey spans on an area of 784,000 square kilometers with a population of 82 million that continues to grow<sup>4,5</sup>. The most populated cities are Istanbul, Ankara (capital city) and Izmir. The country's favorable geographic location, surrounded by the Black Sea, Aegean Sea and Mediterranean Sea, coupled by its historical heritage, makes it an attractive tourist destination (Exhibit 1).

Turkey has been identified as an "emerging market" for several decades. According to World Bank<sup>6</sup>, it is the 19th biggest country by GDP with a growth rate of 2.83% in 2019 although this figure has been much higher, around or more than 5% within the recent past (Exhibit 2). The country is rich in various natural resources, such as coal, boron, lignite, iron, chromite, manganese, zinc, lead, copper and bauxite; yet it is dependent on other countries regarding energy and has to import its oil and natural gas. Major sectors in Turkey are agriculture, textile, automotive, manufacturing, defense and tourism<sup>7</sup>.

In 2019, Turkey ranked 61st out of 141 countries in the competitiveness index of the Global Competitiveness Report<sup>8</sup>. Although the report reveals the market size of the country as a considerable advantage, the country faces major challenges in (1) macro-economic stability, (2) skills, flexibility and diversity of the workforce, (3) efficiency of the legal framework, and (4) freedom of press as well as (5) security issues (Exhibit 3). Low macro-economic stability is recognized to stem from high inflation rates and poor debt dynamics, which in turn render the country more vulnerable and open to external shocks. With a relatively high GINI index of 41.9 in 2018<sup>9</sup>, Turkey lags behind European countries and the unemployment rate of 10.9% is a major challenge<sup>10</sup>. Moreover, some major political troubles within the recent years have paved the way to deteriorated relations with the country's neighbors as well as longtime allies. For instance the shooting down of a Russian military jet in November 2015 and the killing of the Russian Ambassador in December 2016 had detrimental effects on relations with Russia, one of the countries sending the largest amount of tourists to Turkey. Furthermore several attacks by the Kurdish terrorist group PKK (Kurdish Workers' Party) and ISIS (Islamic State in Iraq and Syria), the failed coup attempt on July 15, 2016 were extremely harmful for the tourism industry. Additionally, Turkish referendum rallies banned in Germany and the Netherlands, arrests of several politicians, public and military officials, academics, Turkish and foreign journalists, human rights activists as well as a US pastor<sup>11</sup>, the war on the Syrian border and the disputes over the gas drilling operations in the Mediterranean Sea damaged the relationships with Iraq, Syria, Russia, Israel, United States as well as many countries in the European Union. On the other hand, Turkey's large market size and potential still attract some foreign direct investment although at a lower rate than previous years.

## Tourism industry

According to the World Tourism Organization (UNWTO), 1.5 billion international tourist arrivals were recorded in 2019 globally, representing a 4% increase on the previous year and revealing the tenth consecutive year of growth<sup>12</sup> (Exhibit 4). Moreover, the global tourism exports of USD 1.7 Trillion in 2018 indicate that revenues from visitor spending have grown faster than the world economy throughout 2010 – 2018. In 2018 the top ten destinations by international tourist arrivals worldwide were France, Spain, United States of America, China, Italy, Turkey, Mexico, Germany, Thailand and United Kingdom while the United States generated the highest earnings in the world followed by Spain and France (Exhibit 5). It is acknowledged that the top ten tourism destinations receive 40% of worldwide arrivals while top ten tourism earners get almost 50% of total tourism receipts<sup>13</sup>.

Favorable economic conditions with growing economies worldwide, coupled with enabling digital technologies facilitating travel organizations and growing air transportation capabilities around the world played an important role in the growth of the tourism industry<sup>14</sup> and its internationalization<sup>15</sup>. Due to the increased number of city-pair routes globally and decreasing costs over the past two decades<sup>16</sup>, air transport has become the primary choice for travelers. As a result of air travels becoming accessible to more people around the world, it is estimated that the demand for air transport will double within the next two decades<sup>17</sup> resulting in a higher growth in the tourism industry. On the other hand, according to World Travel and Tourism Council<sup>18</sup> tourism industry "accounts

for 1 in 10 jobs worldwide and delivers 1 in 5 of all new jobs created in 2017". Moreover, it also helps with the development of small and poor locations in the world by providing jobs and income for the residents and even for low-skilled employees in the area<sup>19</sup>. As tourism "can be only be consumed in locally, tourism takes on an important role as a strategy for local development"<sup>20</sup> by creating new business opportunities, new companies and organizations.

### **Turkey's Tourism Sector**

Turkey is the sixth most visited country in the world with ca. 46 million international tourist arrivals, generating almost USD 23 billion representing 20.1% of Turkey's exports in 2019<sup>21,22</sup>. Although the country is not within the top ten tourism earners' list in 2018<sup>23</sup>, tourism industry is still one of the major pillars of the Turkish economy. According to TÜRSAB<sup>24</sup> the primary reasons for visiting Turkey are identified as sightseeing, entertainment, sports and cultural activities (62.8% of all foreign visitors in 2019), followed by people accompanying the visitors (14.7%) and visit of friends and family (11.1%). Turkey is indeed a well-known destination for tourists with an important historical heritage with several historical and religious sites, antic cities and monuments as well as natural beauties and a renowned coastline for summer holidays. Moreover, the country has an advantageous geographical location at close proximity to Europe, Middle East, Asia, and CIS countries. As a result, when the nationalities of the incoming tourists are assessed, the first 5 countries sending visitors to Turkey are Russia, Germany, United Kingdom, Bulgaria and Ukraine<sup>25</sup>.

On the other hand, as the international tourism industry is related to the current political conditions as well as relations among home and host countries, Turkey had serious problems during 2015 and 2016. Due to the above-mentioned terror attacks and political instability in the country, the number of tourists fell by 30%, from 36.9 million in 2014 to 25.3 million in 2016 while the revenues fell from USD 34.3 billion to USD 22.1 billion<sup>26</sup>. Following the improvement of relations with Russia in 2017, Turkish tourism was able to recover as the number of visitors from Russia as well as other neighboring and Caspian countries started to improve. Consequently, tourism revenues started to return to expected levels in 2017, marking the return of international tourists following two difficult years. Furthermore, the Ministry of Culture and Tourism and Turkish travel agencies made substantial investments in marketing and promotional support to accelerate the recovery process. As a result, the number of international arrivals increased by 28%, 22% and 14% in 2017, 2018 and 2019 consecutively<sup>27</sup> and as such tourism has been a major support for the country's vulnerable economic situation during those years (Exhibit 6). To spread the country's risk due to the fragile political relationships with Russia and European countries, Turkey is lately focused on diversifying its tourist portfolio. For instance the Ministry of Culture and Tourism made the decision to invest in marketing the country in Asia more substantially to alleviate its dependency on the former countries although they are still the ones sending the majority of tourists and thus generating the substantial portion of the revenues.

On the other hand, the depreciation of Turkish Lira against Euro significantly altered the customer profile as the strengthening of Euro led to an increased purchasing power of international tourists, while lowering the purchasing power of domestic visitors. Nevertheless, domestic trips in Turkey still point out to an expanding trend throughout the years, except for 2016, during which there has been a coup attempt. According to OECD, the overall number of domestic trips in the country rose to more than 126 million in 2018<sup>28</sup> (Exhibit 7).

Regarding the most popular destinations in Turkey, Antalya and Istanbul are at the top of the list as each hosts ca. 12 million foreign and domestic tourists per year (Exhibit 8). On the other hand, the country offers several other options. For instance, while Antalya, Muğla (Bodrum, Datça and Fethiye) and İzmir (Çeşme and Alaçatı) are preferred for summer holidays; Istanbul, Edirne, Hatay and Mardin are well known for their historical or natural sights. It is also reported that both local and foreign tourists prefer air transportation followed by road transport as the water and rail transport infrastructure is not widespread in the country (Exhibit 9).

### **Turkey's Tourism Cluster**

Turkey is located between Europe and Asia and can be easily accessed by several countries. It is a country with four seasons, creating a favorable environment for visitors throughout the whole year. The country's history dates to 10<sup>th</sup> - 9<sup>th</sup> millennia BC<sup>29</sup>, with Göbekli Tepe, identified as the first temple in the world. Moreover, there are

several historic sites and monuments all around the country belonging to different time periods and various cultures. This rich heritage makes Turkey one of the most renowned must-see places in the world.

The contribution of Turkish Airlines, the leading global brand of Turkey and the airline company covering most destinations worldwide<sup>30</sup>, is crucial in the development of the country's tourism industry. Istanbul New Airport, which began operations in October 2018, is one of the world's largest international airports and is expected to be an important hub within the coming years. This in turn will give Turkey an advantage to call attention to its tourism activities, natural and historical heritage, and help further to pave the way for international recognition.

There are many service and infrastructure sectors supporting the tourism industry in Turkey. For instance, the country's fertile land areas suitable for agriculture are important factors for the development of an extensive food & beverage sector and a rich variety of culinary alternatives. As a result, most of the people visiting the country are reported to be impressed by different tastes and diverse regional cuisines. Furthermore, the recreation and entertainment activities bring in high revenues as visitors like to spend a pleasant time and experience different activities during their journeys. Several tour organizations offering various experiences in different parts of the country including historic site visits, festivals, sports activities and countless restaurants, night clubs, bars, cafes and concert halls, all playing an important role in the development of the tourism industry.

As of April 2020, there are 4088 hotels in Turkey with a total number of 1,000,089 beds<sup>31</sup>. These numbers are expected to increase as there are 692 hotels under construction<sup>32</sup>. The majority of the hotels are located in the most visited cities of the country, namely Antalya, Istanbul, Muğla and Izmir. There are several global as well as national tour operators working with the hotels in Turkey with yearly agreements. Those operators book in advance, within the first 3-4 months of each year, the number of rooms that they intend to sell to their customers in the upcoming months, for a pre-agreed rate with the hotel. Moreover, well-known online booking agencies around the world also offer their services to both international and local tourists willing to visit destinations in Turkey.

On the other hand, the government's emphasis on transportation and construction throughout the last decades was an important factor in connecting cities through motorways and air bridges, and as a result supported the tourism industry with the much-needed infrastructure and connectivity. Healthcare services and the tourism sector have a symbiotic relationship, and the increasing demand for healthcare services in Turkey within the last years helped to stimulate the tourism industry, as people who visit the country for healthcare services tend to stay for some time or even visit other cities in the country. The number of people who travelled to Turkey for healthcare services has been increasing throughout the recent years to reach more than 560,000 people in 2019<sup>33</sup> (Exhibit 10). Most in-demand services are hair transplant and plastic surgery. While the majority of the patients used to be people from the Middle East, recently the number of European patients took over due to Turkey's strategy to become more attractive for European countries. The main reason for foreign people preferring Turkey to get healthcare is the country's ability to provide high quality service with lower price compared to other countries<sup>34</sup>.

Moreover, finance and especially the banking sector have a critical role for the tourism industry in Turkey. For foreign tourists, banks are the safest places to exchange money, and several bank branches in Turkey have English speaking staff in the touristic areas. Furthermore, banks offer special holiday loans to domestic visitors and help them to organize their vacations by financing and funding them. For instance, people are encouraged to buy their holiday packages and then pay them in monthly installments for up to 12 months, and resultantly they can go to trips that they could not afford otherwise.

The education sector is also an important factor for the Turkish tourism industry as the increasing number of international students stimulates the tourism sector and creates a potential visitor base for the upcoming years. According to Ministry of Culture and Education, the number of international students in Turkey has been increasing with a CAGR of 75% within the last 10 years to reach 148,000 in 2019<sup>35</sup>. In addition, Turkish vocational tourism schools and tourism and hotel management majors offered by universities supply qualified workforce for the tourism cluster. Especially in Antalya, Izmir and Istanbul, where tourism is a major source of income, there are several well-known universities such as Bogazici, Akdeniz, Ege Universities offering hotel management programs and encouraging students to work as interns in the tourism industry during their studies.

Despite the importance of tourism in the country and the country's popularity among foreign and domestic tourists, Turkey is ranked 43rd out of 140 countries according to World Economic Forum (WEF)'s Travel and Tourism Competitiveness Index 2019<sup>36</sup>. It is acknowledged that Turkey has considerable advantages regarding air transport infrastructure, cultural resources and business travel, tourist service infrastructure and prioritization of travel and tourism. However, the country faces challenges due to problems with safety and security, environmental

sustainability, human resources, and labor market. The aforementioned political tension with other countries, economic instability, previous terror attacks and the war at the Syrian border distort the peace in the country and resultantly there is a high risk of people becoming hesitant to visit Turkey. Moreover, security problems as well as the decreased purchasing power of Turkish people due to the economic instability in the country negatively affect the number of domestic tourists. Another major problem of the tourism sector in Turkey is the difficulty in finding well-educated and qualified human resources. With a median age of 32 and 67.8% of the population between 15-64 years<sup>37</sup>, Turkey has access to a large labor force of around 33.3 million people<sup>38</sup>. However due to the lack of educated work force, business owners have difficulty recruiting qualified personnel in several sectors including tourism.

### **Alaçatı**

Alaçatı, a village in Western Turkey having a coast to the Aegean Sea, is among the most popular luxury tourism hubs in Turkey. It is 79 kilometers away from Izmir, the 3rd largest city in Turkey and ca.10 kilometers from Çeşme, the popular summer resort of people from Izmir (Exhibit 11). It takes about 45 minutes to travel from Izmir to Alaçatı by car, and as of 2019 there are 41 airlines organizing direct flights to Izmir Airport from 35 different countries and 68 different cities<sup>39</sup>. The population of Alaçatı was around 10.000 people as of 2018<sup>40</sup>. Over the years, the population has increased steadily only having a drop in 2017 due to the economic downfall in Turkey (Exhibit 12). It should be noted that in the summer season the population increases up to 60 times its original size, mostly due to incoming tourists and people from Izmir preferring to spend the hot season in their summer houses around the area.

Alaçatı has become a very trendy tourism destination within the last 5 years with approximately 580,000 domestic and 60,000 foreign tourists arriving to the area every year. The village is mostly popular among Turkish people with only 9.4 % of total visitors being foreigners. Moreover, Alaçatı has a relatively short season, limited to only three to four months of summer and the number of visitors starts to increase in June, doubles in July, peaks in August and starts to fall in September (Exhibit 13).

### **History of Alaçatı**

Until the sixteenth century Alaçatı was full of vineyards and the dominant industry was wine production, where high-end wines were produced out of high-quality grapes<sup>41</sup>. Following the conquest of this Genoese region by the Ottomans in 1566, the area got deserted and Alaçatı became an abandoned village with the vineyards transformed into swamps till mid 1800's. Around 1850's the area started to thrive once more due to Greek laborers who were brought in to dry the swamp. As the Greek people got established there, they started to replant vines as well as mastic trees, and thus initiated an economy based on agriculture<sup>42</sup>. Once they started to live in Alaçatı, they built their houses with their own architectural style. These typical small houses built from stone and white paint are still in use today in the "Hacı Memiş" neighborhood, the most popular street in Alaçatı today, with its souvenir shops and restaurants (a typical Alaçatı house can be seen in Exhibit 14).

In 1923, right after World War I, a population exchange agreement was signed between Turkey and Greece. The agreement resulted in the displacement of ca. 2 million people between the two countries including the Greek population in Alaçatı who had to leave behind their houses and businesses. After this incidence Alaçatı was deserted once more; and until the beginning of 1990's it continued to be a small village with a limited population and modest agricultural engagement despite the popularity of its neighbor Çeşme, which hosts a large number of families from Izmir during the summer months.

However, Alaçatı's destiny changed when British and French windsurfers discovered the area that offered a unique opportunity for those interested in the sport. Alaçatı is nowadays identified as one of the most suitable areas in the world for windsurfing with its unique steady wind and its mild climate. The popularity of the area among foreign surfers eventually raised an awareness on Alaçatı locally and globally, resulting in an increased number of tourists and investments to the area. The traditional Alaçatı houses were gradually transformed to hotels and restaurants due to the increasing demand both from the windsurfers and domestic visitors. Resultantly, a growing number of people from Istanbul, Izmir and Ankara started to visit Alaçatı during weekends and holidays in



summer. Moreover the popularity of Alaçatı's beaches, restaurants and bars paved the way to an increasing number of both domestic and international tourists coming to spend the day from the neighboring district Çeşme.

In the year 2000, the real estate prices in Alaçatı increased up to 3,000% compared to the previous year<sup>43</sup> as people started to buy summer houses and spend their vacations there, due to the village's increased popularity throughout the years. The traditional food, windsurfing, organic lifestyle, and architectural heritage took the interest of Istanbul's elite and Alaçatı became a niche, expensive and luxurious tourism destination. In 2006, the government gave its consent to the municipality to zone additional lands for construction with the condition to construct new buildings according to the old architectural style. This initiative boosted the amount of constructions in Alaçatı and it is estimated that an average of 200 construction licenses per year are given to contractors to build hotels, facilities, and summer houses in the area<sup>44</sup>.

### **Tourism Cluster in Alaçatı**

Today Alaçatı is among the most "hip" destinations in Turkey, especially popular among the young generation during the summer months. Extending on an area of approximately 100 km<sup>2</sup>, Alaçatı tourism cluster is home to several companies employing around 25,000 people and generating ca. USD 360 million per year<sup>45</sup>. In addition to its strong linkages with the neighboring Çeşme tourism cluster, Alaçatı has been able to develop its own ecosystem throughout the recent years. The main actors in the cluster are hotels, restaurants, bars, beaches, windsurfing centers, travel agencies, shops and other trade facilities; supported by agriculture, food and beverage industries among others.

First and foremost, Alaçatı is known for its small boutique hotels with typically 5 to 15 guest rooms. It is reported that only 2% of the hotels in the area have above 40 guest rooms<sup>46</sup>. The majority of the 287 hotels in the village are built in the typical Alaçatı style with traditional stone house architecture and generate around USD 33 million of revenue per year. Hotel owners in Alaçatı are members of two institutions, namely CESTOB (Çeşme Tourism and Hotel Owners Association) and ETİK (Aegean Tourism and Accommodation Association). Targeting to increase the quality and service standards along with the profits of hotels, both CESTOB and ETİK made sure that hotel owners come to a consensus on the minimum room rates to be charged for each season. This initiative paved the way for higher standards, profit levels and increased competition among Alaçatı hotels.

There is a total of 226 restaurants and bars operating in Alaçatı<sup>47</sup>. Most of the restaurants are located in the Hacı Memis neighborhood, serving mostly regional food and wine produced in the area. Operating in a setting of traditional Alaçatı houses and gardens, there are different categories of restaurants and cafes; while some are popular for breakfast and brunch, others are preferred for afternoon snacks, happy hour drinks or supper. On the other hand, taking into consideration the highest number of visitors during the day, it is seen that the prime time for restaurants is between 8pm to 1am, while the bars are open until 4am.

Most of the food served is supplied by the 340 hectares of land cultivated by the farmers in the area which lies in the inner parts of the region, far from the sea, and it is estimated that there are several unique herbs endemic in Alaçatı. The average cost of a dinner in those restaurants is around 50 dollar per person which is quite high for Turkish standards. This is mostly due to the high rental costs of the restaurants and bars in the area, reaching USD 50 per square meter per month. As the tourist season in the area is limited to the summer season, it is rather difficult for restaurants and bars to adequately reply to the high demand between June-August and then survive during the remaining months with almost no demand. Thus, it is estimated that around 7% of the newly opened restaurants and bars close down yearly due to seasonal demand, high prices and high competition.

In addition to the hotels and restaurants in the village, there are also some vineyards around Alaçatı providing accommodation and dining services albeit with limited capacity. Urla and Lucien Arkas Wineries are the best-known ones serving a large base of clientele for accommodation, cuisine as well as wine shops. The two combined operate on 620 acres of land, processing ca. 2500 tons of grape and producing almost 3 million bottles of wine per year<sup>48</sup>. Both wineries have been chosen among the best quality wines in the world and won prestigious prizes including CWSA and International Wine Challenge awards<sup>49</sup>.

Another attraction of Alaçatı is the boutique shops offering jewelry, accessory, and clothes. The products offered in those niche stores located on basement floors of traditional stone houses, mostly reflect a local touch, and offer special designs. In addition to the boutique shops, Alaçatı is also known for its marketplace where a weekly street market (Alaçatı bazaar) is held every weekend with local fresh herbs, vegetables, fruits, and other

food specialties. The increased popularity of the bazaar is appreciated by tourists as well as locals and people come to Alaçatı from different cities or even close by Greek islands to shop, resulting in a massive traffic in the area.

Alaçatı is very popular with its beaches and there is a total of 13 beaches, of which 4 are public and 9 are private. Although the beaches were solely used as swimming areas in the past, they adopted a new concept and transformed themselves to “all day long entertainment places” within the last 10 years. They started to offer happy hours in the afternoons with loud music and dancing as well as night beach parties and concerts with renowned DJs and singers. With an average entrance fee of USD 15 and another USD 15 for drinks per person, the private beaches are the most preferred and popular entertainment destinations for tourists and especially young people. Moreover, some music festivals are organized in the area during the months of October and November with famous DJs and singers to help Alaçatı's economy during the off-season.

Besides entertainment places, windsurfing is the number one reason behind Alaçatı's growth after 1990's. Recognized as one of the three most suitable and preferred windsurfing locations all around the world, the area is acknowledged to have a steady, unique wind and a suitable climate. Its 2 kilometers long racecourse that stretches the opposite shores of the strait, hosts over 30 championships including the world windsurfing championship every year<sup>50</sup>. Currently, a total of 10 windsurfing schools in the area train sportsmen and sportswomen. Many tourists take windsurfing lessons in summer, creating a huge economy and appeal. It is estimated that windsurfing creates around USD 10 million yearly revenue in the area. The steady wind in the peninsula has also paved the way to the development of some wind power plants in the area and the energy produced helps with the energy supply in the whole Aegean region. However, so far the use of clean energy in the area is still not evaluated and utilized as an opportunity towards a sustainable tourism practice .

In Alaçatı there are over 100 tourism agencies and 50 car rental offices. The tourism agencies operating in the area offer daily tours as well as weekly or custom tours to visit Alaçatı region in detail and organize tours for the local wineries, bazaar and Hacı Memiş region as well as more comprehensive tours to other destinations in the Aegean coast.

There are several tourism and hotel management schools and universities around Alaçatı, providing the necessary workforce in the area and supplying educated and qualified workforce as well as management personnel for hotels and restaurants. Ege, Dokuz Eylül and Yaşar Universities are all located in İzmir and have tourism and hotel management schools. Several students from those universities are known to come to Alaçatı during their internships and many of them get jobs in the area upon their graduation.

On the other hand, it is reported that there are some problems regarding healthcare in the area as there is a shortage of medical facilities. For instance, there is only one public hospital in Çeşme, ca. 10 kilometers from Alaçatı with a capacity of 50 beds<sup>51</sup> with a limited number of senior doctors and medical equipment. As there are no other fully fledged hospitals in the area, apart from few very small scale private polyclinics, it is reported that during the summer season there is a shortage in the supply of medical care. This creates a risk for urgent cases as patients must be transferred to İzmir. Furthermore, for complex surgeries and intensive care patients İzmir is the best option with several specialist doctors and hospitals.

On the other hand, as previously mentioned Alaçatı's closeness to İzmir Airport makes it easily accessible for people from other cities in Turkey as well as other countries. However, although there is public bus service from İzmir Airport to Alaçatı<sup>52</sup> there are very limited public transportation options within Alaçatı and people have to use the taxi most of time, which is a costly option.

## Competition

Although there are several popular tourism resorts in Turkey, including the neighboring Çeşme, it is important to identify the competition taking into consideration Alaçatı's distinct tourist attraction features. Thus, Bodrum and Antalya are identified as the domestic competitors of Alaçatı while Greek islands such as Mykonos and Santorini are the a priori international competitors.

Bodrum with its population of 165,000 is in the Aegean and is a well-known destination for foreign as well as Turkish tourists. It is especially popular among German, British, and Dutch tourists with several large as well as boutique hotels with different price scales. Bodrum is also home to many summer houses, and with the increasing number of people preferring to live there throughout the year, has become an all year destination especially among the Turkish. Bodrum's night life, restaurants, clubs, beaches, historical heritage, and high-end marinas attract all

kinds of tourists. Within the recent years, as some well-known and luxury global hotel chains made investments in the area, some of Bodrum's districts have become popular and trendy with increased price levels. Bodrum's advantages among other resorts in the region, are its developed infrastructure, lavish hotels and resorts, full-fledged hospitals, well known supermarket chains and a large variety of department stores with global brands.

Antalya with its 2.5 million inhabitants is located at the Mediterranean and is among the biggest cities in Turkey. Besides tourism, Antalya contributes significantly to Turkey's economy with its agriculture. The area is known for large, luxurious, and all-inclusive concept hotels, and is especially popular among tourists from Russia and other CIS countries. There are also quite a number of domestic tourists visiting the area and several conferences as well as large company meetings are held in Antalya's hotels with large meeting rooms and conference venues. There are not many stand-alone beaches nor bars, restaurants in the area as people tend to spend most of their time in the prepaid, all-inclusive hotels. In addition to its historical sites, Antalya is known to be one of the most preferred destination for sport tourism in the country. Besides rafting and trekking, the area is well known in the world due to its large number of golf courses, where golfers can play during a long season extending from March to November.

The Greek islands in the Aegean Sea are the most imminent international competitors of Alaçatı with Mykonos and San Torini as the most popular ones among them. Mykonos with a population of 10,000 people is renowned for its boutique and concept hotels, summer houses, Greek style narrow streets, beaches, beach parties and nightlife. It is more of a destination for young adults preferring to dance and party with a season starting in May and continuing till mid-September. On the other hand, San Torini has a population of ca.10,000 as well and is especially known for being a volcanic island and has a unique character with impressive clifftop villages as well as vineries. It is especially popular among people targeting to have a romantic and laid-back vacation and has its peak season between May to mid-September. Compared to Mykonos and San Torini, Alaçatı is relatively cheaper due to the weak position of TL over Euro.

### Challenges of Alaçatı

Alaçatı's unique and distinctive features are its convenience for windsurfing, its historic and traditional architecture, boutique hotels and restaurants. As a result of the area's increasing popularity throughout the years, the number of visitors has been increasing constantly. For instance, in 2018, the number of domestic visitors increased by 18% while the number of foreign tourists increased by 35%<sup>53</sup>. To respond to the increasing demand, Alaçatı's municipality granted construction permits on condition to keep the historic and traditional architecture. However, although the constructions are made in a certain style, due to lack of proper planning, this resulted in an excess amount of construction. Resultantly, two major attractions of Alaçatı are both under threat. First of all an overstock of houses will reduce the boutique atmosphere of the village and will reduce its charm. Secondly, unplanned construction will eventually start to block the wind in the area and will have a detrimental effect on the windsurf tourism.

The demand for Alaçatı increases mostly in summer times, and there are almost no attractions during other seasons. Thus, the area offers business opportunities solely during the peak season and resultantly the majority of the hotels, restaurants, surf schools, and beaches recruit seasonal workers and end their agreements at the end of the summer season. Although the area does not encounter a shortage of labor force due to the support of the tourism schools around the region, there is a shortage of qualified workers as proficient people do prefer to have full time jobs. Moreover, as some of the tourism schools in the area are not as competitive, their graduates do not possess the required competencies. In addition, as all the rents in the area are paid for a whole year, the fixed costs of all the tourist outlets are high and this leads to high prices for the visitors during the limited summer season. Even though Alaçatı Municipality seeks to extend the season of the region by coming up with activities like Herb Festival held in April, Alaçatı Big Fish Tournament in September and Alaçatı Music Festival in October or November<sup>54</sup>, these efforts so far have not been successful in attracting many people.

On the other hand, to promote tourism activities in the country, the Turkish government provides incentives for tourism investments in terms of tax deductions and investment loans. However, as the terms of the loans are shorter than other European countries with 5 - 10 years, it is reported that they put a pressure on the investors to charge higher prices to the visitors.



## Epilogue

According to Ferreira and Estevao<sup>55</sup>, tourism is identified as one of the activities with the greatest potential in the world as it plays an important role in the competitiveness, and regional, national, and global development. On the other hand, the realization of the touristic potential of any country or region depends substantially on this location's "ability to maintain a competitive advantage in supplying goods and services to visitors"<sup>56</sup>. Taking those factors into consideration, how should Turkey in general and Alaçatı in particular improve the competitiveness of the tourism cluster?

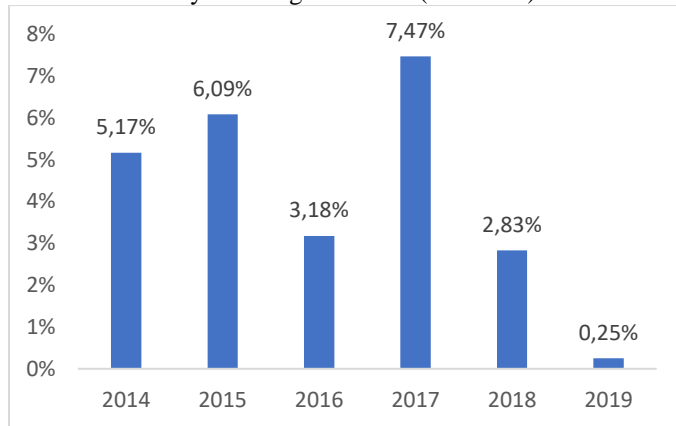
Last but not least, the economic and political instability of Turkey are considerable factors restraining tourism investments as well as preventing tourists to visit the country. Following the political & economic crisis in 2018 with continued effects in 2019, Turkey, among other countries, is now facing the Covid-19 pandemic. Considering all these unfavorable conditions which actions should be taken to continue and improve the significant economic impact of tourism in Turkey and in Alaçatı?

**Exhibit 1.** Map of Turkey



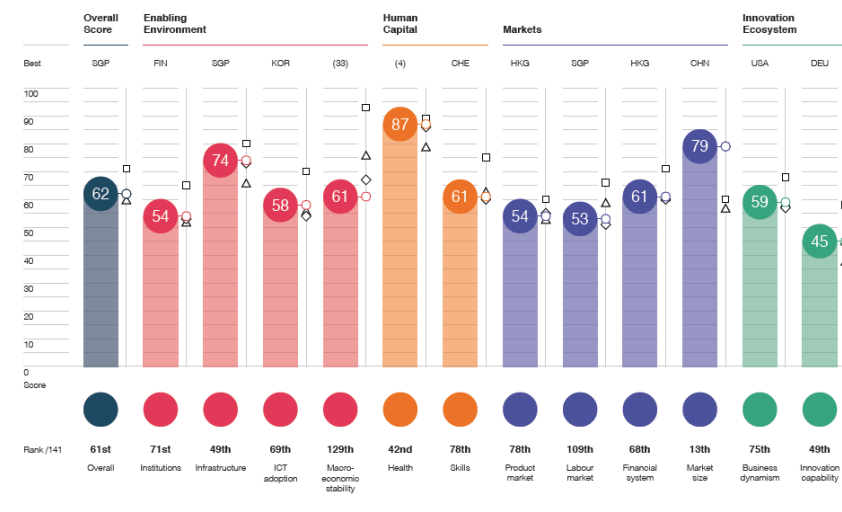
Source: Adapted from Google Maps (2020)<sup>57</sup>

**Exhibit 2.** Turkey's GDP growth rate (annual %)



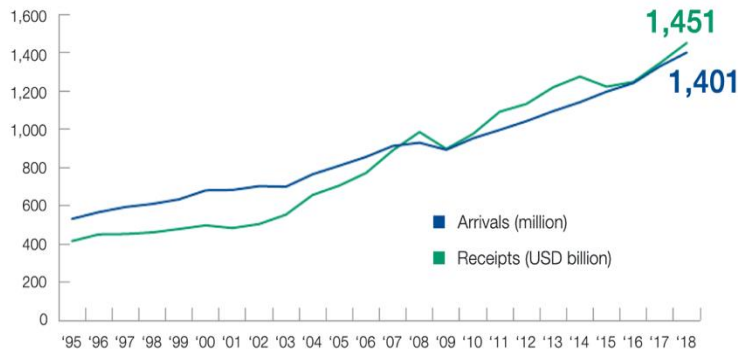
Source: The World Bank (2020)<sup>58</sup>

**Exhibit 3.** Turkey's Competitiveness



Source: World Economic Forum (2019)<sup>59</sup>

**Exhibit 4.** International tourist arrivals and tourism receipts (% change).



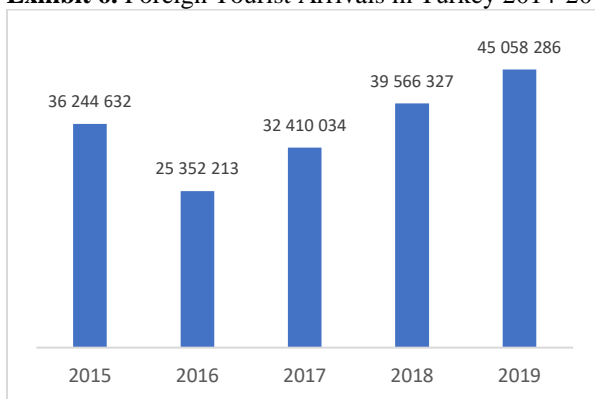
Source: UNWTO (2019)<sup>60</sup>

**Exhibit 5.** Top tourism destinations and top tourism earners (2018)



Source: UNWTO (2019)<sup>61</sup>

**Exhibit 6.** Foreign Tourist Arrivals in Turkey 2014-2019



Source: TÜRSAB (2020)<sup>62</sup>

**Exhibit 7.** Turkey's Domestic Tourism Statistics

Turkey's Domestic Tourism Statistics 2014-2018 (in 000)					
	2014	2015	2016	2017	2018
<b>Total domestic trips</b>	115,088	115,381	106,501	120,872	126,446
<b>*Overnight visitors (tourists)</b>	70,894	71,251	68,450	77,179	78,523
<b>*Same-day visitors (excursionists)</b>	44,194	44,130	38,051	43,693	47,923
<b>Nights in all types of accommodation</b>	575,871	588,786	605,608	665,194	633,721
<b>*Hotels and similar establishments</b>	41,322	39,621	48,623	49,786	55,815
<b>*Other collective establishments</b>	23,209	17,294	17,700	19,030	19,116
<b>*Private accommodation</b>	511,340	531,871	539,285	596,378	558,790

Source: OECD (2020)<sup>63</sup>

**Exhibit 8.** Foreign and Domestic Tourist Arrivals By City

Trips in Thousands	2014	2015	2016	2017	2018	2019
<b>Antalya</b>	11,506.4	10,874.7	5,952.5	9,482.4	12,438.8	13,332.1
<b>Artvin</b>	57.1	59.0	73.5	80.3	89.0	97.9
<b>Edirne</b>	368.6	380.5	339.3	425.3	496.3	539.5
<b>Gaziantep</b>	106.4	26.0	26.0	34.3	36.5	37.6
<b>Hatay</b>	123.1	121.3	121.9	121.4	110.1	102.4
<b>Istanbul</b>	11,843.0	12,429.6	9,218.4	10,730.3	13,433.0	14,715.9
<b>Izmir</b>	1,294.5	1,200.6	672.3	761.7	1,021.6	1,132.0
<b>Kayseri</b>	45.9	48.8	46.5	61.4	64.9	67.7
<b>Muğla</b>	3,302.7	2,918.5	1,657.5	1,982.8	2,723.8	2,920.8

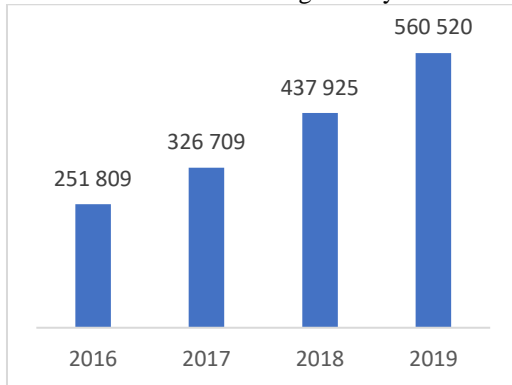
Source: Euromonitor (2019)<sup>64</sup>

**Exhibit 9.** Domestic and Foreign Tourist Arrivals by Transportation Preferences and Aim

Transportation Preferences of Arrivals						
Trips in Thousands	2014	2015	2016	2017	2018	2019
<b>Air</b>	26,794.2	26,807.7	18,819.9	25,618.9	31,615.1	32,181.8
<b>Land</b>	5,954.8	5,596.8	4,885.0	5,999.9	7,037.1	6,925.6
<b>Rail</b>	24.4	17.9	5.7	6.4	7.7	7.6
<b>Water</b>	2,251.2	2,189.7	1,026.1	417.9	486.3	517.9
<b>Total Arrivals</b>	35,024.6	34,612.1	24,736.7	32,043.1	39,146.2	39,632.9
Aim of Arrivals						
<b>Business</b>	2,107.1	1,959.9	1,507.7	1,564.6	1,811.1	1,804.6
<b>Leisure</b>	32,917.5	32,652.2	23,229.0	30,478.5	37,335.1	37,828.3
<b>Total Arrivals</b>	35,024.6	34,612.1	24,736.7	32,043.1	39,146.2	39,632.9

Source: Euromonitor (2019)<sup>65</sup>

**Exhibit 10.** Tourists visiting Turkey for healthcare



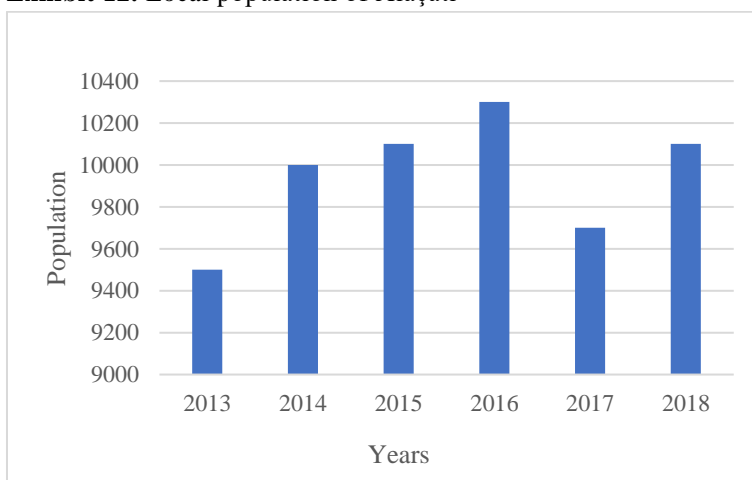
Source: TURSAB (2020)<sup>66</sup>

**Exhibit 11.** Location of Alaçatı.



Source: <http://madeeasierguides.com/ccedile351me--alaccedilat305.html>

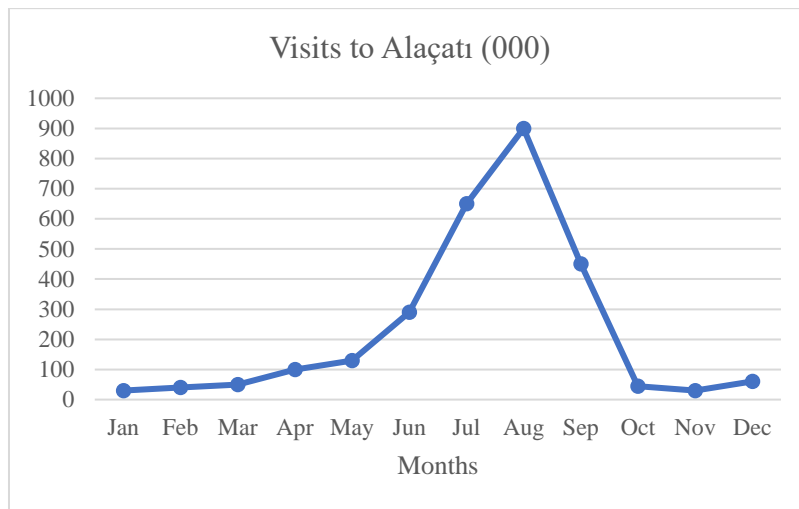
**Exhibit 12.** Local population of Alaçatı



Source: Nufushane (2019)<sup>67</sup>



**Exhibit 13.** Number of people visiting Alaçatı



Source: <https://www.cestob.com/tr>

**Exhibit 14.** A typical Alaçatı house



Source: <http://alacati-taskonak-hotel.alacati.hotels-tr.net/en/>

## Endnotes

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