

Tourism Patterns Show Turkey Shifting from Europe to the Middle East

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Brief Analysis

Many Turks traditionally got their only firsthand exposure to European values by interacting with European tourists, but lately this trend seems to be weakening even as visitors from Muslim-majority or former Soviet countries are on the rise.

Tourism is a major part of Turkey's economy, bringing in estimated annual revenues of \$35 billion. In 2014, nearly 37 million tourists made trips there, making it the sixth most visited country in the world -- not to mention the most visited Muslim-majority country. Europeans in particular long flocked to Turkey, constituting over half of its tourist visitors over the past few decades. This provided an important cultural bridge, exposing many Europeans to Turkey while also exposing Turks to European values -- a crucial benefit in a country where less than 15% of the population owns a passport.

Yet recent trends show that this bridge may be eroding. The Turkish tourism industry has been shifting of late, with terrorist attacks, diplomatic spats, and the July 2016 coup attempt lessening the country's appeal as a destination for Europeans. Last year, the number of visitors from traditional high-supplier countries such as Germany and England plummeted, and overall tourist numbers dropped to 25 million. Although 2017 data indicates that the industry is recovering from that sharp drop, longer-term trends point to a broader Turkish transformation from a European tourist market to a Middle Eastern one, with potentially deep cultural and political ramifications.

THE GROWTH OF WESTERN TOURISM IN TURKEY

Westerners have a long tradition of tourism to Turkey, epitomized by the iconic Orient Express that began service from Paris to Istanbul in 1883. The Turkish republic's first government tourism office was established under the Ministry of Economics in 1934, and a standalone Ministry of Tourism was created in 1963 to cater to the growing influx of Europeans.

The largest boom occurred during the 1980s, due in large part to Prime Minister Turgut Ozal's policy of opening the economy to international investment. Beach tourism in particular took off -- a natural outcome considering the country's 800 miles of coastline. Britons, Dutch, Germans, and other northern and western Europeans began vacationing on Turkey's Aegean and Mediterranean coasts in droves. That shift helped push the country from the world's fifty-second most popular tourist destination in 1980 (with around one million foreign visitors per year) to nineteenth by 1997 (with nearly 10 million).

The upward trend continued after the Justice and Development Party (AKP) came to power in 2002. Turkey became one of the world's top-ten tourism destinations, receiving over one million visitors each from nations such as Germany, England, Russia, and the Netherlands. Most visitors hailed from member states of the Organisation for Economic Co-operation and Development, with an especially large share from Europe. Founded in 1961 by seventeen European nations, Canada, the United States, and Turkey, the OECD has since expanded to thirty-four members, including non-European countries such as Japan, Mexico, and Chile. According to data released by the Turkish Statistical Institute (TUIK), OECD nations supplied two-thirds of Turkey's tourists in 2002. In contrast, the Commonwealth of Independent States (CIS) -- an organization consisting of former Soviet countries -- accounted for only 12.5%. And despite their proximity to Turkey, Middle Eastern countries comprised only 4.71%.

SHIFTING MARKETS

Over the course of the next decade, however, the balance gradually shifted. In 2010, Georgia overtook the Netherlands as Turkey's fifth largest tourist provider, and the top five list was now more evenly divided between OECD and former Soviet nations. In 2014, the OECD's share of Turkey's tourism market fell below 50% for the first time, ending its longtime majority, while the CIS share grew to nearly 25%. Although Turkey's overall market grew continuously until 2015, the OECD had the smallest percentage growth since 2002 (200%), while the growth of CIS countries exploded (490%).

Even more impressive was the Middle Eastern growth rate. Tourists from that region increased by more than 570% between 2002 and 2015, by which point they accounted for 9.88% of all visitors to Turkey. While previous governments largely ignored Muslim-majority markets, the AKP courted them with aggressive outreach campaigns that spurred most of this regional increase.

WESTERNERS PULL AWAY IN 2016

Last year, Turkish tourism took a drastic hit. After averaging annual growth of 10% for more than a decade, the number of foreign visitors to Turkey fell by 30% in 2016. Various factors contributed to this fall -- concerns about terrorist attacks by the Kurdistan Workers Party and Islamic State, some of which strategically targeted tourists (e.g., the January 2016 attack in Istanbul); tourism-related sanctions from Russia after Turkey shot down one of its military planes in November 2015; and the July 2016 coup crisis.

Even so, the number of visitors from fifteen specific countries grew from 2015 to 2016, and the increase was at least 15% for half of them -- Georgia, Ukraine, Afghanistan, Bahrain, Palestine, Israel, Saudi Arabia, and Jordan. Put another way, the diplomatic and safety concerns that slowed tourism from much of the rest of the world did not deter visitors from Middle Eastern and former Soviet countries. Even the number of tourists from Russia itself began to

increase again once Ankara and Moscow reached a rapprochement over the shutdown incident.

ERODING EUROPE'S CULTURAL BRIDGE TO TURKEY

Overall tourism numbers have improved this year, but the trend seems to be continuing. As a deep political crisis unfolds in Turkey and instability continues to rise, Ankara's tensions with European governments will likely dissuade European tourists from visiting in the numbers they once did, at least in the short term.

Beyond the economic dimensions, this trend has important social ramifications as well. On an evening stroll down Istanbul's Istiklal Street, long a symbol of the city's cosmopolitan identity, it is now rare to overhear conversations in languages besides Arabic and Turkish; in past years, a wider mix of Turkish, English, and European languages was the norm. Similarly, many shop signs are now written in Arabic, while bars, art galleries, and cultural venues once filled with intermingling European tourists and Turks have been replaced by vendors more likely to appeal to Middle Easterners (e.g., caftan shops, hookah lounges).

The generational impact of this shift could be particularly powerful because only around 11% of Turks travel abroad. Even at its peak in 2015, the number of Turkish tourists who traveled internationally was less than 9 million out of a population of almost 80 million. For many Turks, then, their only firsthand exposure to the outside world comes from interactions with tourists. In past decades, such interactions introduced them to European cultures and values, but Middle Eastern and former Soviet countries are increasingly coming to the fore.

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