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AN ANALYSIS OF CONSUMER BEHAVIOUR IN THE TURKISH DOMESTIC TOURISM MARKET

TÜRKİYE İÇ TURİZM PAZARINDA TÜKETİCİ DAVRANIŞININ ANALİZİ

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ABSTRACT : This paper is intended to provide an analysis of the consumer behaviour in the Turkish domestic tourism market: a market still in its "infancy" in comparison with many other countries, but with substantial growth potential.

Based on a number of research methods, which were triangulated, ranging from interviews both with consumers and key informants, focus group studies, to observations at travel agencies, together with an extensive literature search, the consumer decision-making process is investigated. As the research is mainly exploratory, the research methodology is inductive and it rests on qualitative techniques.

Key words : *Turkish domestic tourism market, tourist decision-making process, tourist motives.*

***ÖZET** : Bu makalede yeni gelişmekle beraber büyük bir büyüme ve pazar potansiyeline sahip olan Türkiye'deki iç turizm pazarında tüketici davranışı analiz edilmektedir.*

Bilgilerin toplanması ve analizinde, geniş bir doküman araştırmasına ilaveten, tüketiciler, seyahat acentası yöneticileri ve çalışanları ile mülakatlar, seyahat acentalarında üç gün süreli gözlemler ve tüketicilerle odak grubu çalışmaları yapılarak karşılaştırmalı bir değerlendirme özet olarak ortaya konulmaya çalışılmıştır. Çalışmanın temelde keşifsel nitelikte olması sebebiyle endüktif bir araştırma metodolojisi benimsenmiş ve kalitatif teknikler uygulanmıştır.

***Anahtar Kelimeler** : Türkiye iç turizm pazarı, turist karar alma süreci, turist güdülenmesi.*

A General Introduction to Tourism in Turkey and the Rationale for the Research

In Turkey, the growth of international tourism has been phenomenal over the past two decades. Between 1980 and 2003, the number of tourists visiting the country increased more than ten fold, and tourism revenues grew more than thirty fold in the same period (WTO, 2003). In 2002, more than 13 million people visited Turkey and tourism revenues reached $ 10.5 billion (WTO, 2003).

Turkey, as a moderately developed country, has placed a great emphasis on international tourism, due to the fact that compared with domestic tourists, international tourists: spend more; stay longer at the destination; use more expensive transport and accommodation; and bring in foreign currency, which contributes to the country's international balance of payments (Seaton, 1996). In 1998, Turkey's balance of payments deficit reached $32.7 billion, second largest balance of payments deficit in the world (Turkish State Institute of Statistics, 2000).

In industrialised countries, tourism has made a major contribution to the diversification of the economy, and helped alleviate regional imbalances. In developing countries, including Turkey, tourism has provided an export opportunity which has been subject to relatively high growth rates and is less constrained (eg greater price flexibility, self determination, and better employment opportunities) than the more traditional forms of export (Fletcher, 1995). Between 1990 and 2001, tourism industry's contribution to the Turkish Gross Domestic Product increased from 2,1 % to 5.5 %, though its share in the country's total exports showed an erratic performance ranging between 28.9 and 23.4, tourism industry still had a stong influence in reducing the balance of payments deficit of the country (Turkish State Institute of Statistics, 2003). Additionally, tourism represents more than 13% of total employment in Turkey (WTO, 2002). Moreover, tourism is an attractive industry for investment in developing countries, due to the low capital requirement and the shortness of the realisation period for investments (Williams and Shaw, 1992).

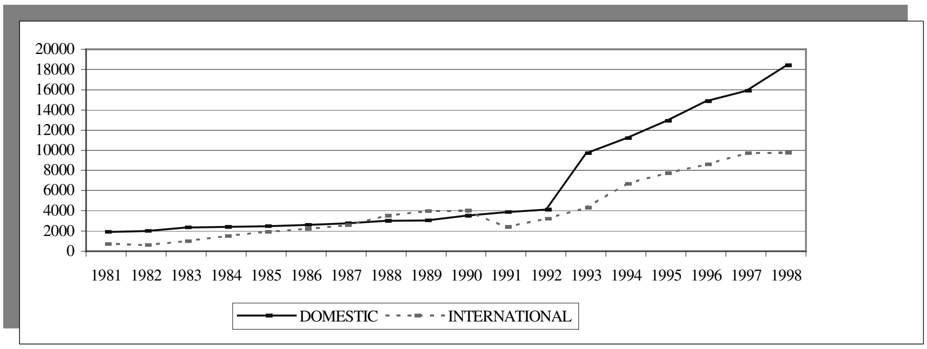
The multiplier effect of tourism industry varies from country to country, and from region to region. Fletcher (1995) developed a *tourism multiplier* league, listing the multiplier effects of tourism in terms of income, employment and government revenues in various countries, regions, cities, and tourist islands. In this multiplier league Turkey's multiplier value was found to be the highest (1.96) followed by the UK, the Republic of Ireland and Egypt, with values 1.73, 1.72 and 1.23 respectively.

Whilst domestic tourism does not cause foreign currencies to come into the country, it does certainly have a positive influence on the economy due to the multiplier effect. Therefore, in Turkey, any positive change, ie an increase in the tourism revenues and any negative change ie a decrease in the tourism revenues, will have greater implications for the economy of the country.

Domestic Tourism Market in Turkey

The domestic tourism market in Turkey has been neglected as a result of growing concentration on international tourism (Kozak *et al.*, 1996). For many years, domestic tourists in Turkey have been seen as a fall back market, a buffer, in periods when there have been problems with international tourism (TÜRSAB, 1999). Köfteoğlu (1998) mentions that domestic tourists were seen as a nuisance and looked down on in many holiday resorts, though they had to pay a lot more than the international tourists. Large international tour operators have been able to bring down prices for their customers due to relatively stronger bargaining power against Turkish incoming tour operators (Yarcan and Peköz, 1998).

This general neglect of the sector in Turkey may be attributed to the late development of the sector after 1993. The industry grew more than four fold between 1993 and 1999. Graph 1 show the growth trend of the domestic industry together with its strength in comparison with international tourism. While the number of international visitors declined in certain periods (eg in 1991, because of the Gulf War), the number of domestic tourists kept steadily rising.



Graph 1 The Development of Domestic and International Tourism in Turkey. Source: Ministry of Tourism Statistics Bulletins 1980-1999, Ankara.

The size of the Turkish domestic tourism market reached $5 billion in 1997, and can no longer be ignored by the firms in the industry (TÜRSAB, 1999). Considering that the size of the market was only $1.2 billion in 1993, the growth of the industry has been remarkable. In 1997, 40% of the population engaged in domestic tourism activities, a 10% increase over 1993 figures. In the same period, the average holiday spending per person increased from $123 to $ 315 in monetary terms (TÜRSAB, 1999). According to a WTTC (World Tourism and Travel Council) forecast, between 1998 and 2005, average tourism spending in Turkey will increase by 230%, the highest growth rate in the world (WTTC, 1998).

It is believed that the pollution of the Marmara Sea, (which surrounds southern Istanbul) towards the end of the 1980s has been influential in the development of domestic tourism in Turkey (Koç, 2000). Before the mid-1980s, the Marmara Sea was not contaminated and people went to the seaside resorts around the Marmara Sea for a day or weekend trip. After the mid-1990, with the beginning of increased pollution in the Marmara Sea which acted as a push factor, more people engaged in domestic tourism activity away from home.

Research Method

Due to the lack of primary and secondary research in the fieldm which was limited only to the Domestic Tourism Report of Turkish Travel Agencies Association (1999), a number of data collection methods; interviews, focus group studies and observations, were used, and these methods were triangulated. In the interviews and focus group studies participants were asked to list the activities/stages they went through before going on a holiday in a sequential order.

In the travel agency observations, it was possible to observe in action the activities mentioned by the interviewees in the initial interviews. Although, it was only possible to observe the activities/stages in the decision making process of tourists after the phase in which they decided to visit the travel agency, it was possible to think and infer about the previous activities/stages in the decision making process, based on the interactions between tourists and the travel agency staff.

In the key informant interviews, there was an opportunity to find out from the staff and management of travel agencies, what sort of processes potential consumers may go through when making their holiday decisions.

Exploratory Interviews with Tourists

In this initial stage of the research, in-depth interviews were carried out with ten couples staying at four different resorts in four different accommodation establishments on the Aegean and Mediterranean costs of Turkey. Interviewees were selected from the accommodation establishments' guest lists on a random sampling basis by choosing one in every five couples with children up to the age of fifteen. The determination of the criteria were based on the fact that families represented 80% of domestic holidays in Turkey (TÜRSAB, 1999).

Key Informant Interviews

12 executives (managers responsible for domestic tourism market in a travel agency) and 16 sales representatives were interviewed from 12 travel agencies. Of the 12 agencies, 6 were major players in the market in terms of market share, and the remaining 6 travel agencies were small independent travel agencies. The sampling method used was convenience based.

Observations

Three full day observations were made in three travel agencies, two of them being large ones and the other, small. The sampling was purposive, rather than statistically based, deliberately selecting three travel agencies which focused mainly on marketing domestic holidays. The observations were aimed at exploring the interaction between the sales staff at travel agencies with a view to understand the decision-making process.

Focus Groups

Two groups of panellists; one consisting of males (5) and the other one consisting of females (6), as the role of husbands and wives were different in the holiday decision-making process (Koç 2000), were selected from the academic and administrative personnel of a local university and a school. All of the participants were married, were between the ages of 21 and 45 with children up to the age of 15. The approach used in determining the panellists was convenience based and purposive. It was felt that it was not an easy task to convince people even with the use of financial and other incentives to participate in a half an hour focus group study in front of a camera with people they did not know.

Final Interviews

At this stage of the research interviews were held with a hundred consumers who were between the ages of 21 and 45 with children up to the age of 15. Interviewees were grouped according to their package holiday experience, i.e. 1-2, 3 and more. The sampling was convenience based and purposive. Interviewees were first asked to fill in a questionnaire regarding their holiday decision-making process. Then, they were asked further in-depth questions to clarify and explain their responses.

The Main Characteristics of People Involved in Domestic Tourism Activity

In this section primary research findings of this research will be presented in conjunction with other researchs studies to present a holistic view of the profile of the consumer behaviour in the Turkish domestic tourism market. However, the main findings of this research are presented under the heading of “The Consumer Decision Making Process” which mainly concentrates of the consumers’ decsion making process.

As mentioned earlier, families with children represent as much as 80% of the whole domestic tourism market in Turkey (TÜRSAB, 1999). The involvement of families in tourism activities may be expected to increase further in the future, as a result of decreasing family sizes over the past few decades (TÜSİAD, 1999; Dibb *et al.*, (1994; and Goodall, 1988a). Between 1968 and 1998, while the number of households increased in Turkey, reaching 15 million (TÜSİAD, 1999), the average size of households decreased from 5.5 persons to 3 –3.5 people (TÜSİAD, 1999). Due to the fact that the main market segment in Turkish domestic tourism is families, Turkish travel agencies serving the domestic tourism market tend to discriminate against individual holiday-makers. For example, individual tourists are not able to benefit from some of the standard sales promotion offers, and they end up paying extra for some of the services included in the standard package price (Arman, 1998).

Compared with Turkey, for instance, in the UK, families supply 59% of the market in outbound holidays and 66% of the market in short domestic holidays. The incidence of taking children on holiday with the family increases in domestic holidays (ETB, 1994).

Geographically, Istanbul, as the biggest metropolitan city with a population of 12 million, supplies the main market for domestic tourism (State Institute of Statistics, 1998). When other major cities such as Izmir, Ankara, Bursa and Koçaeli are included, it could be estimated that people from urbanised areas constitute almost all of the domestic tourism demand. In 1997, 65% of the Turkish population lived in urbanised areas, in other words, more than 40 million people (TÜSİAD, 1999). Considering that in 1950 the urban population was only 25% of the total population, the increase in urbanisation has been phenomenal. It is estimated that the urban population will be 72% of the whole population in Turkey in 2020, thus providing a greater potential for both domestic and outbound tourism (TÜSİAD, 1999).

Tere is a link between urbanisation and spending patterns (Gürkan, 1997). While people living in urbanised areas allocated 27% of their disposable income for food, people living in non-urban areas allocated as much as 41% of their disposable income for food. This would mean that people living in urbanised areas spend lower amounts of their income for satisfying their lower level needs (Maslow, 1954), and hence have a greater opportunity to satisfy their higher level needs including leisure. It may then be suggested that, based on the urban population forecast above, leisure spending in Turkey will increase. A comparative study of European and Turkish tourists visiting North Cyprus by Yavuz *et al.* (1998) showed that almost all of the

Turkish tourists visiting North Cyprus came from urbanised areas, while 78% of the Europeans came from urbanised metropolitan areas.

When domestic tourists are analysed from the viewpoint of their level of education, it appears that university graduates and people with high school diplomas appear to account for 47% of the market (TÜRSAB, 1999). Though the incidence of people with standard primary school education engaging in domestic tourism activity went down from 45% to 28% between 1993 and 1997, they still represent about a quarter of the market which may be attributed to high social mobility in Turkey (Esmer, 1999).

However, people with higher levels of education, for instance, university and high school graduates, tend to spend more on their holidays (TÜRSAB, 1999). Additionally, people with higher levels of education have a higher propensity to use the services of travel agencies (Berksoy, 1994).

In Turkey, both the rate of literacy and the ratio of university graduates to the whole population has increased over the past four decades. In 1950-1951 while 69.5% of people went to primary schools, in 1996-1997 this increased to 97%. Again in 1950-1951 while only 1.3% of people in Turkey studied at universities, in 1996-1997 24.9% of high school graduates went on to study at universities (TÜSİAD, 1999). The increase in the level of education may be expected to result in an increase in domestic tourism activity and an increase in the use of the services of travel agencies.

Berksoy's study (1994) also found a strong positive correlation between the level of income, travel propensity and travel agency use in Turkey. The findings of the Turkish Travel Agencies Association survey (TÜRSAB, 1999) are supportive of Berksoy's (1994). According to this survey, 40% of people who engage in domestic tourism activity in Turkey have an annual income of $10 000 and above. While on average the Gross National Product (GNP) per person is $3100 in nominal terms, the purchasing power parity per capita income in Turkey is $6140 (Turkish State Institute of Statistics, 1998). Additionally, due to the problems in the distribution of income in the country, there are about 3.5 million people whose annual income is in the region of $23 000. In Turkey, while the poorest 10% of the population receive 1.8% of total GDP, the richest 10% of the population receive 40.5% of total GDP (TÜRSAB, 1999). In European countries, for instance, the UK, the distribution of income is much more equal with the poorest 10% receiving 3.2% of total GDP and the richest 10% receiving 26% of the GDP. In Turkey, large urban cities such as Istanbul, Ankara, Izmir, Bursa, Edirne with High Human Development Index Scores (UNITED NATIONS, 1998) account for almost all of the domestic tourists (Düzgünoğlu and Karabulut, 1999).

Although Turkey came 74th in the World Human Development Index (UNITED NATIONS, 1998) in 1997, the figures for the most developed 12 cities in Turkey are much higher. With their human development index scores ranging from 0.859 to 0.783, these cities would have become between the 58th and 48th in the world development index league. Countries which were amongst the top 20 in the world human development index with scores ranging from 0.960 to 0.923, seem to have a higher propensity to engage in tourism activities, both domestic and outbound (Düzgünoğlu and Karabulut, 1999).

Another factor influencing the high involvement in tourism activity by people living in urbanised areas is that, although paid employees who are entitled to annual paid leave constitute 42% of the working population in Turkey, they are mainly concentrated in urban areas (TÜSİAD, 1999).

Families can also be mentioned as a major source of income for the Turkish tourism establishments, due to the high number of marriages in the country. For example, according to the Turkish State Institute of Statistics figures, in 1997 more than six hundred thousand couples married in Turkey. A great majority of these marriages took place between the months of April and October peaking in August, with more than forty five thousand marriages. According to a consumer survey (Capital, 1999). 11% of the married couples go for a honeymoon in Turkey. Teinowitz's (1993) study in the USA found that on average, honeymooners spend 20% more than other holiday makers and they often become loyal future customers. If Teinowitz's (1993) findings hold true for Turkish couples, it would have positive implications for travel agencies, accommodation establishments, etc.

The Duration and Timing of Visits

According to the 1997 Tourism Household Survey carried out by Turkish Ministry of Tourism in 21 cities, 100 towns and with the involvement of 18218 households, the average nights spent at the destination by domestic tourists was 19.3. In 1993, the average nights spent at the destination was 17.5. The duration of domestic holidays appear to be extremely high, which may raise questions regarding the objectivity and the validity of these surveys carried out by Turkish Ministry of Tourism. However, the longevity of holidays can be explained by the fact that these holidays represent the main holidays of Turkish domestic tourists.

On the other hand, for instance, the UK domestic holiday market is characterised by short breaks of one to three nights stays, on average 2.1 days (Smith, 1996). Domestic holidays for British people represent a second or a third holiday alongside their main holidays abroad (Smith, 1996). However, for a majority of Turks (95%), domestic holiday is their main annual holiday (TÜRSAB, 1999). The longevity of the stays in the Turkish domestic tourism market may be attributable to the distance between the holiday resorts and the metropolitan cities, which account for almost all of domestic tourism (TÜRSAB, 1999). 85% of all holidays in domestic tourism are sun and sea holidays, spent at seaside resorts on the Aegean and Mediterranean coasts of Turkey. The distance, for example, between Istanbul and the resorts on the Aegean and Mediterranean coasts can be as much as a thousand kilometres or more which would justify longer stays.

Turkish domestic tourism is highly seasonal. 86% of holidays take place between the months of April and October, with July and August being the highest with 27% and 24% respectively (TÜRSAB, 1999). This seasonality is very much linked to the school summer holidays (between mid-June and mid-September), as the market is mainly families with young children. Compared with Turkey, in the UK, domestic holidays are more or less evenly spread, except in the summer months when British engage in outbound tourism (Smith, 1996).

Apart from the summer time, Turkish citizens, especially the ones living in urban areas, engage in domestic tourism activities during the official paid holidays.

From tourism businesses' viewpoint, among official paid holidays religious holidays (Ramadan and the Sacrifice), which are the longest in duration, are not fıxedö as they are based on the Islamic lunar calendar. As these holidays come forward eleven days each year, causing difficulties for tourism industry planners. For instance, if the Ramadan holiday starts on the 15th of a particular month of a particular year, the following year it would take place on the 4th of that particular month. If these holidays happen to be on weekdays, usually a permission is issued by the Prime Minister to make it a whole week holiday. In these instances, Turkish citizens may have a combined holiday of as much as nine days including both the weekend days at the beginning and at the end of the religious holidays. In those years when these holidays take place in the summer months, tourism activity increases (Ministry of Tourism Statistics Bulletins 1980-1998). In the year 2000 these religious holidays took place in January and March. For Turkish citizens to have a Ramadan holiday, for instance, in August, a period of almost fifteen years needs to elapse.

The Consumer Decision Making Process

Based on the collective findings of the four stages of primary research, the following holiday decision-making process has emerged:

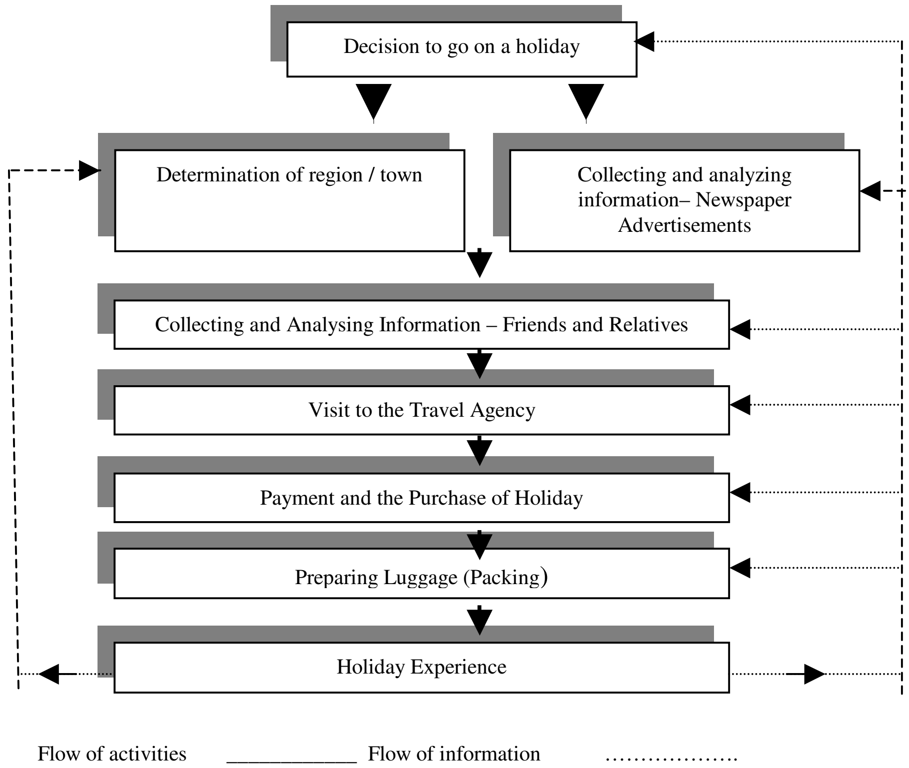


Figure 1 The Holiday Deicision -Making Process

The following table was designed based on the calculation of both the MODE and the MEDIAN of the responses given by the interviewees concerning the sequence of various holiday decision making activities or tasks. The responses of the interviews were taken into account separately, for consumers with lower levels of package holiday experience (1-2) and for consumers with relatively higher levels of package holidays experience (3 and more):

Table 1 The Stages in the Holiday Decision Making Process

	Package holiday experience 1-2		Package holiday experience 3 and more	
	Sequence		Sequence	
Activities	Mode	Median	Mode	Median
Packing	8	8	7	7
Determination of specific a holiday package	3	3	3	3
Collecting information - Newspaper advertisements	1	1	1	1
Collecting information - friends and relatives	0	0	0	0
Contacting the travel agency on the phone	4	4	0	3
Visit to the travel agency	5	5	4	4
Payment and purchase of holiday	6	6	6	6
Determination of region	1	1	1	2
Collecting information - Brochures	7	6	5	4

One of the initial impressions of Table 1, is that the responses of interviewees with lower levels of experience and relatively higher levels of experience are very similar. It appears that the domestic holiday process starts with the simultaneous collection of information from newspaper advertisements and the determination of region. This emphasises the importance of newspaper advertisements as a source of information for the consumers, as newspaper advertisements have a significant influence on the rest of the activities. Interviewees, then, on the basis of newspaper advertisements, determine the package holiday they would like to purchase. Following the determination of a specific holiday package, interviewees contact the travel agency on the phone. Interviewees with lower levels of package holiday experience appear to first make the necessary payment and purchase the holiday and then browse through the brochures. On the other hand, interviewees with relatively higher levels of package holiday experience first browse through the brochures and then make their holiday purchase. Brochures are considered as a significant source of information by the consumers in the Turkish domestic tourism market. In a study carried out by Koç (2000) it is established that about 91% of domestic tourists use brochures. However, it is an interesting finding that the first time consumers come into contact with brochures is when they visit the travel agencies to make a purchase.

As consumers do not receive holiday brochures before making their holiday decisions the use of brochures in the pre-holiday decision-making process seems to be almost non-existent. This is attributable to the short period of time between making the decision and taking the holiday (not more than a week on average) (Capital, 1999), a lack of customer databases, and an inefficient postal system in the country (Koç 2000). Additionally, according to research (Koç 2000) the key informants in the travel agencies suggested that as a result of chronic inflation in Turkey over the years (as much as 6% a month) (Ekonomist 1999), they were unable to include price information in the brochures, which according to them made the sending out brochures to customers pointless. As Turkish domestic tourists use brochures after they have purchased their holidays, this may mean that brochures are being used to reduce cognitive dissonance (Festinger 1957), i.e. to reduce discomfort about the purchase after the purchase decision.

Purposes and Motives

As marketing efforts are aimed at creating and increasing sales through attitude formation and change (Ogilvy, 1983), understanding the motives of consumers, how they make their purchase decisions, and what sort of stages they go through before making their final purchase decision, is of paramount importance to marketing practitioners. By understanding the consumer decision-making process, marketers can develop more effective marketing programmes for a larger audience.

According to the Turkish Association of Travel Agencies research, more than 86% of domestic tourism activity is characterised by sun and sea type of tourism, with the main push factors being rest, tranquillity, relaxation, safety, followed by fun (TEMPO, 1999). Rest and relaxation are not common characteristics of Turkish families alone. For instance, in the USA, Lee and Norman's (1996) research on tourism behaviour and attitudes in different family life cycles, concluded that young married couples with children are particularly interested in rest and relaxation. On the other hand, young singles were mostly action orientated.

The research findings in the first two stages of the research, ie the initial interviews with tourists and key informant interviews, pointed out that the main motives for domestic holidays were rest and relaxation, followed by the need for safe and secure entertaining environment for children. This finding is in line with the findings of research carried out by TEMPO (1999), which outlined rest, tranquillity, relaxation, safety, and fun as the main push factors for domestic holidays. In fact, all of the ten couples who participated in the interviews stated rest and relaxation as their primary reason for domestic holidays. Of these, 8 females and 4 males stated that they were also interested in the safety of their children.

Although, both females and males stated rest and relaxation as the primary motives for domestic holidays, the elements that they want to rest from appear to be different. Some of the comments made by the participants were as follows:

"This is the only time I don't have to do any cooking and cleaning. I wish it could be like this forever. I feel like all my batteries are recharged here." (A female interviewee)

"Sometimes after a hard day's work, coming home having to cook for the family and having to listen to my children's screams and shouts, I feel this is the end of the world. Here, I can rest and relax and forget everything" (A female interviewee).

"I get up everyday at 6:30 to be ready for my work at 9:00. The daily traffic just kills me. And all the weird people you have to be friendly with. It is a pity we have only a week or so in a year to rest. It is enough to give me shivers juts to think about the next week at work". (A male interviewee).

"We have a summer house by the beach, about eighty kilometres from here. When we first bought it we used to go there every summer. But it was never a proper holiday for me. I ended up doing the cooking and cleaning and so on. I was spending most of my time in the house. Perhaps, it was a nice and cosy holiday for my husband and children, but I never enjoyed it as much. But it is different here. I truly rest and relax. I do not have to watch children all the time. People, here, look after them". (A female interviewee).

"In the apartment block we live in there are 38 families. You look around and see just ugly buildings. You go out and you see thousands of cars in the streets. You go to work and you have to work with people you never wanted to be together. I think these holidays help me keep my sanity. Here, I can forget everything and relax" (A male interviewee).

While males stated that they wanted to be away in general from daily stress in terms of work, traffic and pollution, females were more interested in getting away from the household chores. Given the fact that 8 of the females who participated in the interviews were working on full-time jobs, this finding may seem to be interesting which may be biased. However, it is not easy to determine whether their responses are based on the fact that females find household chores such as cooking, cleaning looking after children, etc., as more difficult than their professional job tasks at their work places or males do not engage in household chores anyway so that they do not need an escape from them. This brings up the issue of the complexity of holiday motives and the difficulties in understanding the true motives of tourists which was put forward by researchers like Jafari (1987) and Dann (1997). Another example to emphasise the complexity of holiday motives can be given from the Turkish domestic tourism market. According to research carried out by Turkish Travel Agencies Association (TÜRSAB, 1999) Turkish domestic tourists largely prefer spending their summer holidays in commercial accommodation establishments with swimming pools even though these establishments may be situated next to the sea. This may be caused by a motive on the part of domestic tourists to satisfy their status needs (Maslow, 1968), as many of them may not have a chance to swim in a swimming pool in their daily lives due to high costs of swimming club memberships and or high entry fees. This example also illustrates the point of view of Jafari (1987) and Graburn (1989) who described tourism as a movement away from an ordinary life to a non-ordinary. In other words, domestic tourists, when they were on a holiday, want to do things they do not normally do in their daily lives. Therefore, the basic motives of Turkish domestic tourists bear a resemblance to the motives explained by Graburn (1989), Jafari (1987), and Crick (1989) who emphasised the movement away from an ordinary daily mundane life to a non-ordinary life for rest and relaxation.

It must be stated that rest and relaxation are not common specific motives of Turkish families alone. For instance, in the USA, Lee and Norman's (1996) research on tourism behaviour and attitudes in different family life cycles, concluded that young married couples with children were particularly interested in rest and relaxation while young singles were mostly action orientated. Yavuz *et al.* (1998) who carried out research into the travel motives of Turkish tourists visiting North Cyprus (outbound tourism activity) discovered that, in addition to the motives of rest and relaxation, the fun seeking also appeared to be significant. This may be attributed to the fact that the majority of the Turkish people (57%) who visit North Cyprus are singles, in contrast to the domestic tourism activity in Turkey, where the majority of tourists (80%) who engage in domestic tourism are families.

Key informant interviews with 12 executives (managers responsible for domestic tourism market in a travel agency) and 16 sales representatives from 12 travel agencies indicated that in general, travel agency staff were aware of the motives of their customers. However, it was surprising for the researcher to find that about one third of the executives clearly lacked a deeper understanding of their customers' needs and motives. Given the fact that customers usually interact with sales representatives, it was not unusual to see that almost all of the sales representatives had an understanding of their customers' needs and motivations. There was a lack of coordination in terms of collecting, analysing and disseminating information in travel agencies. The managers of travel agencies were also unaware of the fact that current newspaper advertisements were not seen as satisfactory by tourists in helping them make a holiday decision.

Based on the lack of information about the customers mentioned above, it is not surprising that Turkish travel agencies, in their factual newspaper advertisements, use only the attributes of the destination and the holiday package (pull factors) without any reference to the push factors ie the needs and motives of tourists. Marketing communications messages using both pull and push appeals would appear to have superiority over messages which use only one type of pull or push appeals. Using only pull factors in the marketing communications represents a product-oriented approach, ignoring the demand, ie the needs and the desires of the consumers. Many general consumer buyer behaviour models such as Kotler's (1998), Assael's (1995) and Peter and Olson's (1996), together with specific tourism consumer behaviour models such as Goodall's (1988b) and Witt and Moutinho's (1995), see needs and desires of the consumers as the starting point and hence place significant emphasis on them. Most of the marketing communication models which explain how consumer behaviour toward a product can be established or changed, emphasise the needs and desires of the consumers. Based on the premise that "buyers purchase neither tangible objects or intangible features; rather they purchase a bundle of benefits" (Enis and Roering, 1981), it may be suggested that the provision of both pull and push factors in marketing communication messages can show customers the instrumentality of a holiday package in satisfying their needs.

In Turkish domestic tourism activity, the push factors of rest and relaxation result in most of the holiday time being spent by domestic tourists at the accommodation establishment, by the pool or on the beach. In Yavuz *et al.'s* (1998) research, more or less the same push factors were cited, with the fun factor tending to be more significant. This may be attributable to the fact that the majority of Turkish people (57%) who visit North Cyprus are singles, in contrast to domestic tourism in Turkey, with a majority of tourists (80%) taking their holidays with their families.

Motives and Typologies

Based on the analysis of the motives and the types of activities they do on their holidays, Turkish domestic tourists seem to fall in to the *Sun Lover (SNL)*, *Organised Mass Tourists (OMT)* and *Independent Mass Tourists (IMT)* categories in Yiannakis and Gibson's (1992) model. Additionally, the characteristics of Cohen's (1972) *Organised Mass Tourist*, *Individual Mass Tourist* and Westvlaams Ekonimsch Studiebureau's (1986) *Family-Oriented Sun and Sea Lovers* appear to be describing the features of Turkish domestic tourists. As has been seen, in broad terms, Turkish domestic tourists can be classified as psychocentrics (Plog, 1974).

Sun Lovers (SNL) seem to have a preference for high structured (X-axis) holidays in highly familiar and relatively tranquil environments. This may present an opportunity for the travel agencies operating in the Turkish domestic tourism market as 80% of the domestic tourists fall in to the category of Sun Lovers. According to the Turkish Travel Agencies Association figures, 86% of the domestic tourists go on a holiday between the months of April and October for sun and sea holidays. Gray (1970) described this motive as *sunlust*. Tranquillity, rest and relaxation also appear to be the main preferences of Turkish domestic tourists (TURSAB, 1999).

In the Turkish domestic tourism market, Independent Mass Tourists (IMT) and Organised Mass Tourists (OMT) can be seen as two sub-categories of Sun Lovers (SNL). Although the amount of OMTs, ie the number of people go on package holidays organised by travel agencies is still low (15%), this is not a specific characteristic of Turkish domestic tourism market alone. For example, in the UK, the travel agency use for domestic holidays does not constitute more than 9% of all domestic holidays. However, considering the fact that domestic tourism in Turkey is an infant sector, and only became significant as late as 1993, many industry experts estimate a strong growth for the travel agency use. This means an increase in the number of OMTs. The past growth rate of the travel agency usage can be used as another indicator for its future growth potential. In Turkey, travel agency use increased by more than two hundred per cent between 1993 and 1997 (Gürkan, 1998) and can be confidently expected to increase thus in the future.

As mentioned above travel expenditures of Turkish domestic tourists, increased from \$123 to \$315 between 1993 and 1998, and the WTTC estimated further growth in tourism expenditures per capita. Such statistics and forecasts strongly suggest the need for designing and implementing marketing communications strategies that are tailored more precisely to specific groups or consumers. In order to design and implement marketing communications tailored for the target market, marketing managers need to be able to classify groups of tourists according to their characteristics and identify the motives of people in the target market. In this way, the effectiveness of the marketing communications messages can be improved.

The positive developments mentioned earlier might lead to the emergence of other tourist roles in Turkey such as Jetsetter (JST), Explorer (EXL), Action Seeker (ACT), etc. With the emergence of other tourist roles, tourism demand may be spread over the whole year rather than being crowded around the summer months. This would make the demand more manageable for the travel agencies and the accommodation providers. Culligan (1992) suggested that the tourist's increasing desire for more novel, adventurous, and 'authentic' forms of tourism experience is a function of the decline in *utility* associated with a decision to simply replicate previous experience; an increasing ability to afford different forms of tourism. This means a move away from General Interest Tourism (GIT) towards Special Interest Tourism (SIT) (Brotherton and Himmetoglu, 1997). Krippendorf (1987a, b) argued that fundamental changes occurring in the tourism market in general are in line with the developments of new patterns of tourism consumption. He maintains that in the near future there will be a substantial decline in those tourists for whom *hedonism* is a dominant travel motive and for whom tourism is seen purely as a mechanism for recovery [rest] and liberation [escape from the ordinary]. Instead, the travel market will place emphasis on the environmental and social context in which tourism occurs, and the humanisation of travel (Krippendorf, 1987a, b). In fact what Krippendorf (1987a, b) is saying is that there will be a move from GIT to SIT with decreasing utility in hedonistically motivated holidays. Assuming that Krippendorf (1987a, b) and Culligan's (1992) views hold true for Turkish domestic tourism, the implications are clear.

In the light of the findings of Yiannakis and Gibson (1992) and Culligan (1992), it could then be recommended that, for the time being, Turkish travel agencies should emphasise the tranquillity, familiarity and high structuredness of their package holidays in their marketing communications for the Sun Lovers (SNL) and Organised Mass Tourists (OMT). On the other hand, to attract Independent Mass Tourists (IMT), the various activities and visits to local sights might be more effectively stressed, in addition to the advantages of a package holiday.

Organisation of Holidays and the Use Travel Agencies

The use of the services of professional business organisations such as tour operators and travel agencies by consumers seems to be related to the level of perceived risk that they may feel in purchasing a particular holiday. According to a Turkish Travel Agencies Association survey, about 15% of domestic holidays are booked through travel agencies (TÜRSAB, 1999). Considering that in 1993 this ratio was only 2%, the use of travel agencies has increased remarkably over the past few years. As mentioned earlier on, Berksoy (1994) and İslamoğlu's (1995) research concluded that there was a positive relationship between travel agency use, level of income and the level of education of customers.

The use of the services of professional business organisations, such as tour operators and travel agencies, by tourists also appear to be related to the level of perceived risk that customers may feel in purchasing a particular holiday. For instance, in the UK, the use of travel agencies by the British when they go on a holiday within the UK is as low as 9% (Trinity Research, 1989). The use of travel agencies increase to 40% when the British go on holiday abroad. In the city break segment, travel agency usage increases to 90-95%. The use of travel agencies should not be attributed to the perceived risk factor alone. For instance, Smith (1996) proposes that the low level of travel agency involvement in the UK domestic tourism market is attributable to the fact that customers prefer booking quite late, and discounting, ie getting discounts for early booking in short-breaks, is unusual. Additionally, the availability of and easy access to promotional information produced by the holiday establishments and regional tourist authorities in the UK may be expected to reduce the travel agency use. This means that domestic tourists in the UK can have access to promotional information provided by holiday establishments and the regional authorities which promote their regions. The development of tour operators and the strategic alliances in the tourism industry, both vertical and horizontal, have increased economies of scale for the operators resulting in reduced prices for the final consumers (Goodall, 1988a).

One of the reasons for the low travel agency involvement in the UK was that customers preferred booking quite late, and discounting in short-breaks was unusual. In the Turkish domestic tourism market, customers also book quite late, the average being not more than a week before the holiday (TURSAB, 1999). However, travel agencies in Turkey use a number sales promotion methods rather than discounting and competing on price (Arman, 1998).

The use of travel agencies increases in outbound holidays, as is the case in the UK and European outbound tourism (TÜRSAB, 1998). According to Yavuz *et al.*'s (1998) research, 60% of Turkish citizens having a holiday in North Cyprus use the services of a travel agency. This is relatively high, especially considering the fact that North Cyprus may be perceived as a domestic destination by many tourists due to its proximity, common language and culture, and the fact that Turkish citizens are allowed to visit North Cyprus without a passport.

Conclusion

It is believed that the information provided in this study have many clear implications to be taken into account for marketing practioners operating in this market. The marketers need to adjust their marketing efforts around the consumer decision making process. For istance, it is clear from research that, consumers come into contact with brochures after they have made their purchase decisions. As indicated in the findings of key informant interviews, there is a lack of understanding consumer motives among travel agency management. It is difficult for firms to survive and prosper in competitive markets without an understanding of the consumers, their motives and their decision-making process. It is recommended that travle agencies develop customer databases and carry out research to identify changes taking place in this dynamic market.

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