

Research Article

Comparison of Tourism Policies with Statistics: The Example of Türkiye and Mediterranean Countries

Turizm Politikalarının İstatistiklerle Birlikte Karşılaştırılması: Türkiye İle Akdeniz Ülkeleri Örneği

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Abstract

The tourism industry, which started to recover rapidly after the Covid 19 pandemic in late 2019, has regained growth momentum and revitalized and strengthened countries economically. In short, competition in tourism destinations continues at its old pace again. It is expected that you need to have sustainable and robust tourism policies in order to take an advantageous position in this competitive environment and to be able to compete with competitors. Therefore, this study compares the destinations of France, Spain, Italy and Türkiye, which have been in first place in both visitor numbers and tourism revenues for many years and are located on the Mediterranean line. The study's main purpose is to evaluate employment, sustainability and destination management policies in the tourism industry across countries and to develop recommendations for the relevant authorities through the tourism policies of these destinations, which are important competitors for Türkiye. It has been determined that Spain, Italy and France allocate significant budgets for tourism policies and give more importance to digital applications. Although Türkiye's sustainable tourism policies are particularly interesting, it is determined that Türkiye needs more development than its competitors, especially in employment and destination management policies. Developing tourism policies based on qualitative rather than quantitative criteria will bring Türkiye closer to its competitors in the future and give it more competitiveness.

Keywords: Türkiye, Tourism Policy, Sustainability, Destination Management, Employment in Tourism

2019 yılı sonlarında yaşanan Covid 19 pandemisi sonrası hızla toparlanmaya başlayan turizm endüstrisi, tekrar büyüme ivmesi yakalamış ve ülkeleri ekonomik anlamda canlandırıp güç kazandırmaya devam etmektedir. Kısacası turizm destinasyonlarında rekabet kaldığı yerden tekrar eski hızıyla devam etmektedir. Bu rekabet ortamında avantajlı konuma geçebilmek ve rakiplerle mücadele edebilmek için sürdürülebilir ve sağlam turizm politikalarının olması beklenen bir gerçektir. Dolayısıyla bu çalışmada uzun yıllardır gerek ziyaretçi sayılarında gerekse elde edilen turizm gelirlerinde ilk sıralarda yer alan ve Akdeniz hattında konumlanan Fransa, İspanya, İtalya ve Türkiye destinasyonları karşılaştırılmıştır. Çalışmanın temel amacı, turizm endüstrisinde istihdam, sürdürülebilirlik ve destinasyon yönetimi politikalarını ülkeler arasında değerlendirmek olup Türkiye özelinde önemli rakip olan bu destinasyonların turizm politikaları aracılığıyla ilgili otoritelere öneriler geliştirmektir. Başta İspanya olmak üzere İtalya ve Fransa'nın turizm politikaları için önemli bütçeler ayırdığı ve dijital uygulamalara daha fazla önem verdiği tespit edilmiştir. Türkiye'nin özellikle sürdürülebilir turizm politikaları ilgi çekici olsa da özellikle istihdam ve destinasyon yönetimi politikalarında rakiplerine nazaran daha fazla gelişime ihtiyacı olduğu belirlenmiştir. Niceliksel ölçütler yerine niteliksel olarak turizm politikalarının geliştirilmesi gelecekte Türkiye'yi rakiplerine daha fazla yaklaştıracak ve O'na daha fazla rekabet gücü kazandırabilecektir.

Anahtar Kelimeler: Türkiye, Turizm Politikası, Sürdürülebilirlik, Destinasyon Yönetimi, Turizmde İstihdam

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1. Introduction

Tourism is an important industry that adds economic, socio-cultural and environmental value to both developed and developing countries. In order to generate more income from this industry, compete more strongly with competitors, and ensure the continuity of tourism activities, countries must make various plans and develop policies (Tuncel, 2019). Economic reasons are at the forefront of the development of these policies. Tourism brings in foreign currency, creates employment with entrepreneurship opportunities, can attract foreign investments directly to the region where it develops, and encourages regional development by creating attraction center destinations and directing the interest of visitors to these centers (Jenkins, 2015). However, unplanned and rapid tourism growth can bring social, cultural and environmental problems (Mejjad, Rossi, & Pavel, 2022; Shahbaz et al., 2021). Therefore, it is vital to produce realistic and accurate policies with current parameters for the healthy development of tourism in destinations.

Globally, tourism continues to develop and grow. France, one of the pioneers of the tourism industry, has been the world's leading international tourism destination in terms of tourist arrivals since the 1990s (Corne, 2015). Spain, another major destination, attracts large numbers of tourists internationally, and tourism has become a pillar of the Spanish economy, generating income and employment and is seen as a strategic industry (Blázquez-Resino et al., 2024). In Italy, another leading destination, the tourism industry accounts for over 10% of Italian GDP and represents over 11% of employment (Cellini and Cuccia, 2015). Türkiye, which ranks first in terms of the number of visitors, is one of the most important markets in the international arena, especially in terms of cultural and sea tourism (Tekin, 2015), but it is also an important touristic destination waiting to be evaluated in terms of alternative tourism types.

The tourism industry, which is of vital importance for these countries in the Mediterranean basin (Mejjad, Rossi and Pavel, 2022), grew steadily in the years before the COVID-19 pandemic in late 2019. From early 2022 onwards, the industry started to recover rapidly again, shaping its statistics for 2023 with an estimated 1 billion 286 million international visitors (overnight visitors) worldwide (UNWTO, 2024a). Therefore, the competition continues among these destinations, and it is seen that these countries again share the first places in the annual visitor numbers.

From this point of view, the aim of the study is to compare the current policies of Türkiye, which has rapidly recovered after the COVID-19 pandemic and increased the number of visitors and tourism revenues, with France, Spain and Italy, which are at the forefront in the global tourism industry, located in the Mediterranean region and ranked first in visitor and revenue statistics. In addition, it is among the objectives of the study to reveal how visitor statistics and tourism revenues in countries have been shaped after the COVID-19 pandemic. In general terms, the study focuses on comparing visitor numbers, tourism revenues and policies.

The findings of the study can reveal the differences in tourism policies and shed light on policymakers for future tourism policies. It can give Türkiye a competitive edge against its most important competitors and shape Türkiye's tourism policies in the coming years.

2. Conceptual Framework

2.1. Tourism Policy and Planning

The tourism industry's Plans and policies must reflect the opportunities, conditions and constraints of a country or its different tourist destinations. However, even if it is a dominant industry in some places, tourism should be considered in conjunction with national development and priorities. It should never be seen as a stand-alone industry but rather one that affects other sectors through a multiplier effect and is itself affected by other sectors. For example, government policies on fiscal issues, visa procedures, diplomatic relations and foreign investment are all likely to affect the development and functioning of the tourism industry. This reflects the interdependencies between sectors and makes the tourism industry often seen as a complex area of activity. This is where plans and policies should come into play. There are two main reasons that explain this better. The first is to use available scarce resources to support development initiatives. The second is to allocate these scarce resources efficiently and in the right place (Jenkins, 2015).

The tourism industry continues to grow globally as the number of visitors increases, and this increase is reflected in revenues. According to the latest World Tourism Barometer report published by the United Nations World Tourism Organization (UNWTO), in the first seven months of 2024, the number of visitors reached approximately 790 million, an increase of 11% compared to the previous year. While this figure represents a strong start, it is still 4% behind 2019 (UNWTO, 2024b).

Tourism, which is included in the services sector, is more intertwined with people than other sectors and is an industry that focuses on people. For this reason, the tourism industry is seen as an important solution to the unemployment problems of countries with its wide range of job opportunities. Therefore, tourism employment can be defined as the employment of individuals of working age under the control of the State or private sector, providing services to both national and international visitors and earning a living through this service. As the tourism industry continues to develop and grow, the need for a labor force increases in parallel, and the tourism industry makes significant contributions to employment (Sarı & Uçar, 2010). Employment in the tourism industry can be analyzed under three headings: direct employment, indirect employment and stimulated employment. These are (Tutar et al., 2013):

- ✓ **Direct Employment:** Direct employment in the tourism industry is the totality of employees working in enterprises that carry out their activities within the scope of tourism, such as accommodation, food and beverage and travel enterprises, which are specified as sub-sectors. Examples of direct employment in the tourism industry are the receptionist in a hotel, the service staff working in a restaurant, guides, and the hostess in an airline company.
- ✓ **Indirect Employment:** Indirect employment is made up of employees working in enterprises that respond to the needs of the tourism industry and are affiliated with sectors that do not directly have tourism elements. This can be considered as evidence that the tourism industry supports other sectors in terms of employment. For example, the workers who will be employed for the construction of a hotel to be built in a region or the workers who will be needed for the production and assembly of furniture components of a finished hotel (Barker, Mathieson and Wall, 1983).
- ✓ **Stimulated Employment:** Stimulated employment, also referred to as additional employment, is the increase in the level of employment in those sectors as a result of the increase in income from tourism activities and the increase in the welfare of the local people who spend the income they earn in other sectors throughout the region or the country.

Destinations, which offer experiences to consumers through tourist products as a whole, can be considered a geographical regions with defined borders, such as a country, an island or a city. In addition, destinations are also defined as the name given to travel routes together with visitors' education levels, visit purposes, local culture and past experiences (Buhalis, 2000; Karabıyık & Sümer İnci, 2016).

There are four main strategic objectives that should be emphasized in destination marketing. These are (Buhalis, 2000; Karabıyık & Sümer İnci, 2016):

- ✓ Ensure the long-term well-being of individuals living in the region
- ✓ Satisfying tourists by looking after their satisfaction.
- ✓ Keeping the profit level of entrepreneurs in the region at high levels
- ✓ To achieve a sustainable balance in costs between economic, socio-cultural and environmental factors and to maximize tourism impacts.

The success of strategic objectives developed in destinations depends on the relationships between tourism stakeholders and the destination. Tourism stakeholders include local people, i.e., the community, tourists, entrepreneurs of the tourism industry and sub-sectors, the public sector, governments, agencies and tour operators. It is important that the strategic objectives set for destination marketing are implemented through the actors in the tourism stakeholder cycle. Therefore, each stakeholder should aim to maximize their contribution (Karabıyık & Sümer İnci, 2016).

Especially since the early 2000s, the concept of sustainable tourism has been used more frequently and is widely referred to in most strategic plans and policy documents (Hardy et al., 2002). Sustainability is a fundamental concept of development and is influential in the development of the tourism industry, which has an enormous economic, social and environmental impact in the modern world. Sustainable tourism encompasses activities that protect the demands and desires of visitors with a high degree of satisfaction, provide important experiences for tourists, raise their awareness of sustainability, and carry touristic products and services together into the future (Streimikiene et al., 2021). Therefore, sustainability is integral to tourism development, planning, shaping tourism policies and destination management (Rasoolimanesh et al., 2023). In other words, sustainable tourism aims to strike a balance between the economic, social and environmental needs of visitors and all stakeholders and local communities, taking into account the overall impacts of tourism (Buckley, 2012).

The concept of sustainability, which we mentioned as the most fundamental element, is also an influential factor in the management of tourist destinations, and past studies have shown that sustainable tourism policies significantly affect destination management and tourism development and have a mediating role in the relationships in this development (Khan et al., 2021). Natural, cultural and environmental resources are essential for the development of a tourist destination. Therefore, these resources should be managed and developed through improved tourism policies and responsible destination management (Su et al., 2018).

This study also compared the policies on sustainability and destination management implemented by the countries that rank first in terms of both the number of visitors and the tourism revenues generated, especially in annual tourism data.

3. Methods

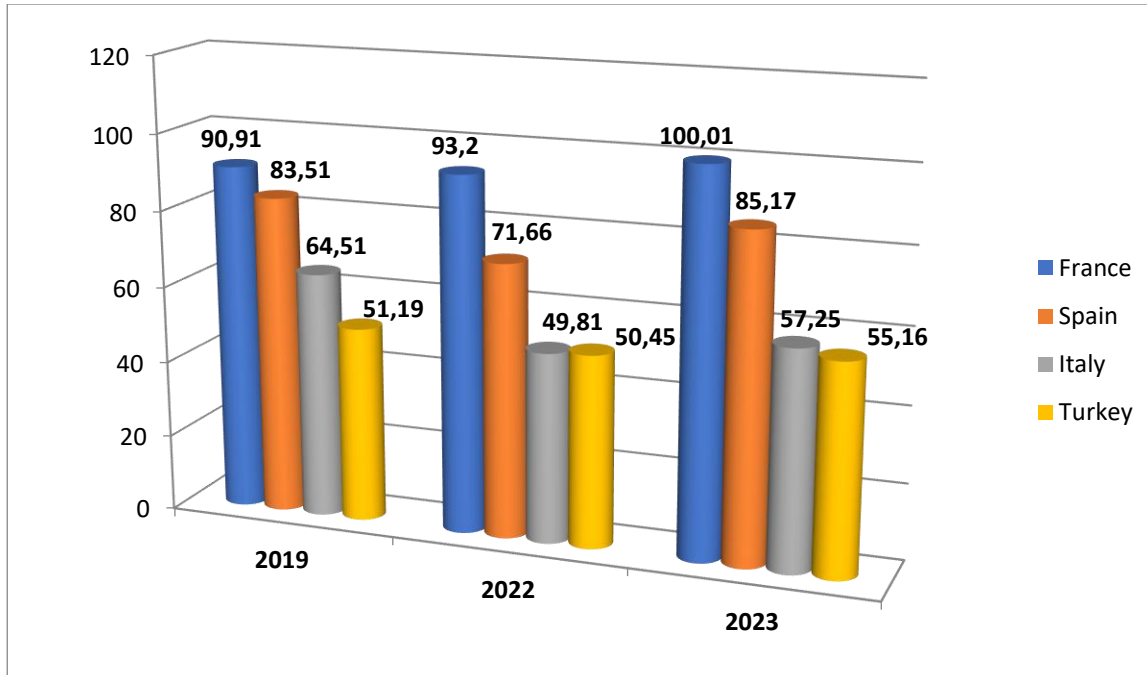
In connection with the purpose of this study, secondary sources were utilized through document analysis, one of the qualitative research methods. Document analysis involves the analysis of previously published sources that contain information about the subject to be researched (Yıldırım & Şimşek, 2013). The research focused on the following questions

- 1. How have the statistics on the number of visitors been shaped in the relevant countries after the COVID-19 pandemic?*
- 2. How have tourism revenues shaped in the relevant countries after the Covid-19 pandemic?*
- 3. Under which Ministry the tourism industry activities are carried out, and how the tourism organization chart is formed at the national level*
- 4. What is the number of people directly employed in tourism, and what is their percentage contribution to total employment*
- 5. How is the cooperation relationship between headquarters and local governments defined in the relevant countries?*
- 6. What are the prominent topics in employment policies for the tourism industry in the relevant countries?*
- 7. What are the prominent topics in the destination marketing policies implemented in the relevant countries?*
- 8. How have sustainability policies in tourism been shaped in the relevant countries?*
- 9. When were promotional agencies established in the relevant countries, and what were their activities?*

This study analyzed the websites of tourism stakeholders in the relevant countries, relevant academic publications, OECD 2022 and 2024 reports, and various reports published by UNWTO. After accessing the necessary information, various tables and figures were created by content analysis, focusing on the questions investigated by the study. After these categories were interpreted, the findings were obtained, and a better understanding was provided.

4. Findings

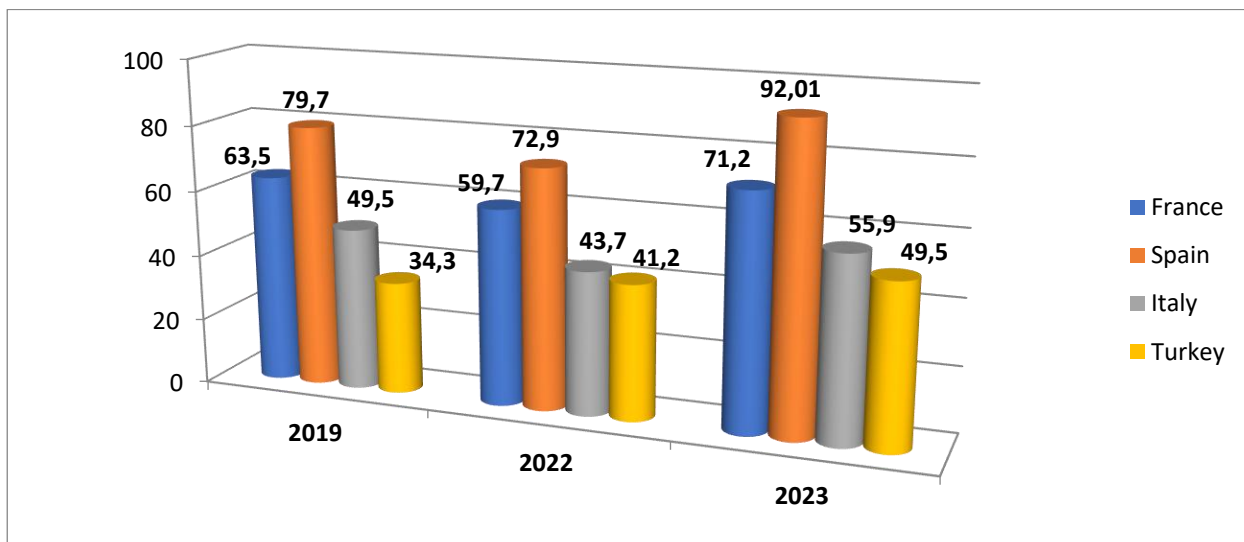
Figures, tables and interpretations formed in line with the documents and reports reviewed are discussed in detail in this section. Firstly, the comparison of the number of visitors in France, Spain, Italy and Türkiye in 2019 before the pandemic and in 2022 and 2023 after the pandemic when tourism recovered is shown in Figure 1.

Figure 1. Number of Visitors in France, Spain, Italy and Türkiye in Relevant Years (Million)

Source: Compiled by the authors from UN Tourism, 2024; Statista, 2024.

According to Figure 1, which examines the number of visitors in 2019, which is the start year of the pandemic, and in the following years, it is seen that France hosted the highest number of tourists in 2019, 2022 and 2023 among the four countries compared. In contrast to France's ever-increasing visitor numbers, Spain fell behind its pre-pandemic figures in 2022 after the pandemic but surpassed Spain's pre-pandemic figures by 2023. On the other hand, Italy has still been unable to catch up with the number of visitors in 2019 in the post-pandemic years. This situation can be the subject of a different study. Türkiye has drawn a similar picture to Spain in terms of the number of visitors and has reached and exceeded its pre-pandemic figures in 2023. An interesting result is that in 2022, Türkiye also overtook Italy in terms of visitor numbers. However, in 2023, Italy again surpassed Türkiye in the number of visitors it welcomed. According to this graph, it is clearly seen that the effects of the pandemic process have left the pre-pandemic figures behind in all three countries except Italy in terms of the countries compared. The slow corrections in Italy's visitor numbers may be due to stricter practices or regulations introduced after the pandemic.

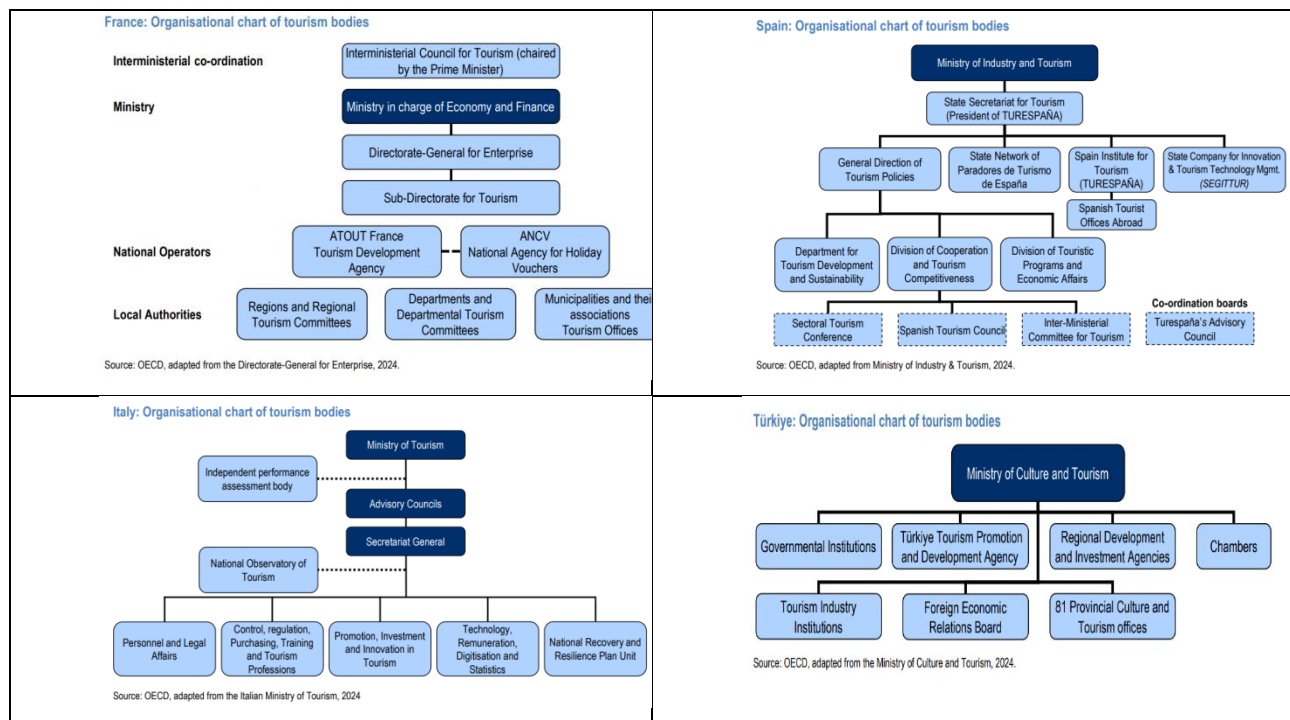
Figure 2 below shows the tourism revenues of the comparison countries in the relevant years.

Figure 2. Revenues of France, Spain, Italy and Türkiye in the Relevant Years (Billion\$)

Source: Compiled by the authors from UN Tourism, 2024; Statista, 2024.

Figure 2 shows the tourism revenues of the compared countries in 2019 before the pandemic and in 2022 and 2023 after the pandemic. According to this graph, Spain, which generated the highest tourism revenues before the pandemic, experienced a decline of approximately 7 billion USD in 2022 after the pandemic but quickly recovered in 2023, bringing its tourism revenues to the top. Secondly, France presents a picture similar to Spain's. Although France generated less tourism revenue in 2022 than before the pandemic, it surpassed its pre-pandemic tourism revenues in 2023. Like Spain and France, Italy fell behind its pre-pandemic figures in 2022 but surpassed its pre-pandemic tourism revenues in 2023. The interesting result is that Türkiye, unlike the other three countries, increased its pre-pandemic tourism revenues both in 2022 and 2023. However, despite this increase, Türkiye has lower tourism revenues compared to other countries among the compared countries.

Table 1. National Tourism Organization Schemes of France, Spain, Italy and Türkiye



Source: Compiled by the authors from OECD, 2022; OECD, 2024.

Table 1 shows the national tourism organizational structure of France, Spain, Italy and Türkiye. In France, tourism operates under the control of the General Directorate of Economy and Enterprise. At first glance, this may create a negative perception, but coordination between other ministries and local tourism administrations is beneficial.

When we look at the organization chart of the tourism industry in Spain, we see that it has a broader hierarchy than the other 3 countries. In Spain, the tourism industry is managed jointly with the Ministry of Economy, which can be considered as an advantageous situation for the proper management of the relations between local tourism stakeholders and the Ministry of Tourism.

Similar to Spain, Italy's tourism industry hierarchy has "Advisory Councils" to coordinate between other ministries and local tourism stakeholders. Unlike other countries, Italy's tourism industry hierarchy has established sustainability-specific units.

In Table 1, Türkiye's organizational structure for tourism management is more centralized compared to the other three countries. Although structures in which central governments have the sole say in decision-making seem to be advantageous, when we look at Türkiye's competitors, local tourism stakeholders have more say in all three countries, and a common communication structure manages the process.

Table 2. Employment in the Tourism Industry in France, Spain, Italy and Türkiye

France has 1.5 million tourism workers, and those in the tourism industry account for 7.7% of total employment.	Spain has 2.6 million tourism workers, and those in the tourism industry account for 12.9% of total employment.
There are 2.1 million tourism workers in Italy, accounting for 8.9% of total employment	Nearly 1 million people work in the tourism industry in Türkiye, accounting for 2.9% of total employment

Source: Compiled by the authors from OECD, 2022; OECD, 2024.

Looking at the figures in Table 2, the country with the highest number of employees in the tourism industry among the four countries examined is Spain, with 2.6 million, followed by Italy, with 2.1 million tourism employees. The interesting result in Table 2 is the employment data of 2 countries, France and Türkiye. Although France hosts more tourists than the other three countries, it does not employ as many people in the tourism industry as Italy and Spain. Türkiye (looking at 2022 figures) hosts almost as many tourists as Italy but employs fewer people in the tourism industry than all competitors. This may be due to the lack of reliable statistical data for Türkiye but also due to foreign labor registrations.

Table 3. Comparison of Cooperation between Headquarters and Local Governments in France, Spain, Italy and Türkiye

France	Spain
<p>The institution responsible for tourism activities at the national level in France Ministry of Economy and General Directorate of Enterprise (DGE). Coordination with the tourism industry and other inter-ministerial units, especially by the Inter-Ministerial Tourism Council, is very important. Dialogue between administrations and representatives of private actors is also included within the Tourism Sector Committee (CFT), which was created in 2019 and relaunched in 2022 and aims to bring together public and private parties to guide the development of tourism after the pandemic.</p> <p>Tourism is seen as a common competence industry for France. The subcategory of local councils is therefore also involved in the development and implementation of tourism policy.</p>	<p>The State Secretariat for Tourism ensures coordination between central and regional administrations and the private sector and plays a critical role in this communication in decision-making and coordination of different tourism policies in Spain.</p> <p>The Sectoral Tourism Conference, chaired by the Minister of Tourism, brings together representatives of the central government and autonomous regions to discuss basic tourism policies and regulations. It also operates as a professional, advisory and executive coordination body.</p> <p>The Spanish Tourism Council is an advisory body that brings together tourism authorities and private sector stakeholders at all levels.</p> <p>The Turespaña Advisory Council, composed of 11 public and private members, helps define and implement strategies to market Spain abroad.</p> <p>The Secretariat of State coordinates three organizations at the national level: Segittur / Turespaña / Paradores de Turismo</p>
Italy	Türkiye
<p>The Ministry supports and supervises the National Tourism Agency, which oversees the promotion and marketing of the national image and brand, and the Club Alpino Italiano, responsible for promoting mountaineering and the conservation and study of the Italian Alps.</p> <p>The National Tourism Agency actively collaborates with tourism stakeholders through periodic meetings to continuously improve the industry.</p>	<p>There is a Culture and Tourism Directorate in every city in Türkiye. These directorates; It aims to protect the historical, cultural and natural heritage, diversify tourism and promote the regions through cultural events, festivals and fairs.</p> <p>The Ministry works closely with the Association of Turkish Travel Agencies, the Federation of Hoteliers, the Association of Touristic Hotels and Investors, the Association of Chambers of Tourist Guides and the Turkish Tourism Investors</p>

Central and regional authorities cooperate through agreements, sharing regulatory powers on a wide range of tourism-related issues. The Joint Conference coordinates strategic cooperation between central authorities and local institutions.	Association to plan tourism and address specific issues. To introduce Türkiye's investment opportunities to the global business world and provide support to investors The Investment Office of the President of the Republic of Türkiye plays an active role.
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Source: Compiled by the authors from OECD, 2022; OECD, 2024.

As mentioned in Table 3, tourism is recognized as a shared competence industry in France. Therefore, the sub-category of local councils is also included in the tourism policy development and implementation process. The importance that France attaches to local governments can also be seen in budgetary terms: In 2022, the combined budget of the Regional Tourism Committees is €140 million, while €222 million is allocated for the Circular Tourism Committee. In addition, a budget of 822 million euros has been allocated to local tourism information offices.

In Spain, the coordination between the general tourism authorities and local tourism authorities is very broad. Segittur, Turespaña and Paradores de Turismo are the three main institutions that take care of the tourism dynamics of the country.

The fact that the National Tourism Agency in Italy constantly holds meetings with the sector and evaluates the tourism industry together with all stakeholders is the most obvious indication that Italy manages the tourism industry in a collective manner.

Türkiye's tourism hierarchy structure has fewer components than other countries, as Table 1 clearly shows. While fewer links in the chain may seem to allow for a faster action mechanism, there may be serious risks in obtaining information from local tourism stakeholders. It is important for the Ministry to work closely with various associations such as Türsab, Turob, Turefed, etc., but it is vital for the tourism strategies to determine whether these associations are aware of the general problems of tourism stakeholders in the country.

Table 4. Comparison of Employment Policies in France, Spain, Italy and Türkiye

France	Spain
<p>Launched a post-pandemic communication campaign.</p> <p>The establishment of a coordination center to mobilize local institutional actors is targeted.</p> <p>Tourism Career Week was organized for the first time in 2023.</p>	<p>In 2022, Spain launched a multi-year program to rehabilitate heritage buildings as part of the Recovery, Transformation and Resilience Plan for Tourism.</p> <p>The budget of this project for 2024 is € 208 million. Within this program, education (especially youth education) linked to the tourism industry occupies an important place.</p>
Italy	Türkiye
<p>In order to promote and improve the professionalism and competitiveness of those working in the tourism industry, the fund has budgeted €5 million in 2023 and €8 million for 2024 and 2025 to retrain existing staff, provide training for new professionals and integrate senior professionals into the tourism market.</p> <p>In partnership with the Ministry of Interior, entry flows for seasonal and non-seasonal workers outside the EU have been streamlined to reduce pressure on tourism recruitment issues.</p> <p>It also aims to renew interest in tourism careers, particularly targeting young workers, with the introduction of tax deductions for night shifts and public holiday work for tourism industry workers.</p>	<p>The Ministry of Culture and Tourism organized a protocol that paired 60 tourism vocational high schools with 41 hotel groups.</p>

Source: Compiled by the authors from OECD, 2022; OECD, 2024.

For sustainable tourism, qualified employment is not a luxury but a necessity. As seen in Table 4, Türkiye's competitors have developed various strategies in the field of employment and have made plans and developed policies to meet this essential need. In particular, the budgets allocated by Italy and the efforts to improve employment in tourism on a sectoral basis are clear indicators of how important the issue is seen and taken seriously in Türkiye's competitor countries.

France's promotional efforts to encourage young people between the ages of 16 and 25 to take part in the tourism industry are reminiscent of the OTEM, which was launched in Türkiye in 1987 as part of the South Antalya Tourism Development Project (GATGP) and provided tourism training to young people between the ages of 17 and 25.

It would be appropriate to note that there is no planning or implementation of a high-budget and comprehensive employment policy for Türkiye as in France or Italy in the documents and reports examined. The fact that Türkiye, which is in a considerable position in terms of the number of visitors among the four countries compared within the scope of this study, lags behind other countries in terms of the number of personnel employed clearly reveals tourism employment as an issue that needs to be studied. However, the Turkish Ministry of Culture and Tourism announced that 60 tourism vocational high schools were matched with 41 hotel groups. Although it is not possible to see the effects of this in a short period of time, it can be examined as a different subject of study on the effects on tourism employment in the coming years.

Table 5. Comparison of Destination Marketing Policies of France, Spain, Italy and Türkiye

France	Spain
<p>The Destination France Plan has been put into effect, and the following topics have come to the fore;</p> <p>Reclaiming skills again.</p> <p>Strengthen the resilience of the industry and support its efforts to improve the quality of its services.</p> <p>Promote and develop France's tourism assets.</p> <p>Tackling the challenges of transforming the tourism industry.</p> <p>Promote France as a destination and consolidate its market share.</p>	<p>A Tourism Resilience Strategy has been developed for the non-peninsular regions (Canary and Balearic Islands and Ceuta and Melilla). The aim is to increase the capacity and competitiveness of these regions to adapt to changes in international markets.</p> <p>In addition, these regional strategies have been approved by the national government and aim at investment in public infrastructure, environmental management and waste treatment, strengthening public services, education linked to the tourism industry (especially youth education), development of alternative tourism products, incentives to facilitate the connectivity of these regions and to enable tourism companies to operate outside the peak season, and development of new tourism products in line with the Sustainable Tourism Strategy.</p> <p>Spain is also implementing specific actions to improve competitiveness across the country.</p> <p>The National Food and Wine Tourism Plan has been published and aims to transform the knowledge, skills, arts and crafts that enable healthy eating and drinking into sustainable and integrated tourism experiences across the region.</p> <p>The National Plan budgets are structured around food and wine destinations (€51.4 million), the Spain Tourism Experiences Program (€10 million and €5 million for additional actions) and an international promotion program (€2.2 million). Its objectives, covering the entire value chain, are described as follows:</p> <p>Promote Spanish food and wine destinations by financing destination sustainability plans.</p> <p>Create sustainable and diverse gastronomy tourism experiences.</p> <p>To improve employees' training, digital skills and sustainability in the food and wine tourism value chain.</p>

	<p>In addition, it is desired to bring together existing practices that add meaning to Spanish gastronomy in an accessible and open space. Thus, it is desired to produce a different message and create stories that will inspire other initiatives in the country.</p> <p>The basis of Spain's tourism promotion abroad is based on gastronomy tourism. Wine tourism is also an important part of this.</p>
<p style="text-align: center;">Italy</p> <p>In 2022, Italy developed a new Strategic Plan for Tourism 2023-2027. The Plan is based on five strategic pillars:</p> <ul style="list-style-type: none"> - Sustainability, - Management, - Innovation, - Quality, safety and inclusion, - Careers in education and tourism. <p>The strategic pillars are divided into key issues defined by the Ministry of Tourism, such as environmental protection and resilience to climate change, protection of cultural heritage and community engagement, diversification of the tourist offer in terms of both time and space and promotion of responsible travel behavior.</p> <p>Other key topics addressed by the Plan include improving the timeliness, quality and consistency of tourism statistics to complement and strengthen existing statistical approaches to support tourism policy-making; strengthening digital tools and accessibility to improve the tourist travel experience; addressing tourism workforce issues; and collaborating with tourism stakeholders to implement the Strategic Plan.</p> <p>The "Tourism Digital Hub," an integrated digital platform, aims to support innovation and digitalization in Italian tourism businesses and provide better information on the distribution of tourist flows. The platform includes the development of a data repository and artificial intelligence models to analyze user behavior online.</p> <p>Participation in major events such as congresses, exhibitions, entertainment and sporting events is targeted as a priority to strengthen the Italy and Made in Italy brands worldwide.</p>	<p style="text-align: center;">Türkiye</p> <p>In 2023, Türkiye launched a new tourism master plan (12th Development Plan) covering the years 2024-2028.</p> <p>The plan serves as a comprehensive roadmap to achieve sustainable and inclusive tourism growth in Türkiye through safe mobility, green transformation, sustainability, crisis management, a more resilient sector, inclusivity and digital transformation.</p> <p>Global branding and promotion activities will continue to increase annually with a budget of \$225 million allocated for marketing communications until 2028, with a total of nine destination brands and 20 product sub-brands to promote Turkish tourism to the world.</p> <p>The Provincial Promotion and Development Program aims to enhance local development by transforming the Destination Management Office model in the long term. It is a program developed with the participation of governments, private sector institutions and civil society organizations to develop the tourism potential of 81 provinces.</p> <p>Türkiye aims to strengthen the branding processes of these destinations by promoting them more effectively nationally and internationally. It aims to increase its visibility in the digital world and create a sustainable and learning destination.</p>

Source: Compiled by the authors from OECD, 2022; OECD, 2024.

Regarding destination marketing, France has taken a multifaceted approach to the tourism industry, particularly service provision, with the Destination France plan and has made plans in this direction. The main objective has been to promote France and consolidate its share in the market.

Table 5 shows that Spain not only tries to enrich tourism geographically by focusing on non-peninsular regions, but also aims to diversify tourism by working on different types of tourism, especially wine and gastronomy. In addition, it is clearly seen in Spain's tourism policy that it has made serious budgetary breakthroughs in order to provide competitive services and increase tourism revenues.

One of the prominent topics in Italy's destination marketing activities is the Tourism Digital Hub application. This can be expressed as Italy seeks answers to the questions of how to manage and develop tourism better by establishing digital control mechanisms.

As seen in Table 5, it can be said that Türkiye will continue with destination marketing within the scope of marketing communication and will make improvements in the digital context. Unlike its competitors, Türkiye

does not have a strong employment-oriented policy, nor does it have a specific policy - diversification of tourism, focusing on a specific type of tourism, etc.

Table 6. Comparison of Sustainability Policies of France, Spain, Italy and Türkiye

France	Spain
<p>The France Destination Plan was launched in 2021. This plan wants to make France a sustainable tourism destination by 2030. In this context, a budget of 1.9 billion Euros has been allocated between 2022 and 2024. In 2021, the France Destination Plan distributed more than €1.9 billion from 2022 to 2024 to make France a leading sustainable tourism destination by 2030. By the end of 2023, there is a budgetary commitment of more than €1.2 billion to the Plan's measures, including incentive loans.</p> <p>France also reviews laws and regulations in the tourism industry and regularly modernizes them to include sustainability criteria. For example, classification standards for accommodation are being updated according to new criteria.</p> <p>In order to improve the balance between short-term rentals and the existing housing stock, France has asked rental platforms to collect and transmit accommodation-related data to local authorities in 2024 and aims to develop this practice. This includes establishing a platform that can centrally manage the exchange of ideas and information between e-agencies and local governments.</p> <p>France also wants to regulate the new legislation in accordance with the new European regulation for short-term rentals.</p> <p>France Tourism Watch portal, managed by Atout France Supports commitment to sustainable tourism. In this context It will play an active role in creating the table of sustainable tourism indicators.</p> <p>In addition, all tourist accommodation classification criteria are met. It is aimed to better distribute the tourist flow. Thus, it is aimed to take actions together with tourism professionals to prevent and solve problems related to overcrowding in tourist areas.</p>	<p>A Tourism Sustainability Strategy has been developed, and the Plan highlights the following headings;</p> <p>Green transition: Consists of actions on environmental restoration, management and public use of protected natural areas, implementation of tourism certification systems, implementation of circular economy measures and investment in cycling/walking paths.</p> <p>Energy efficiency: Includes actions to reduce CO2 emissions in buildings, public infrastructure and services, implement environmental technologies and improve urban environments.</p> <p>Digital transformation: It consists of actions to digitize services for tourists in destinations, improve the digital footprint of destinations and improve tourism demand management.</p> <p>In this context, the Digitalization and Intelligence Program was developed. The program, It aims to develop smart destination platforms where public and private services can work together for tourists in destinations.</p> <p>In addition, it is planned to develop a Tourist Intelligence System and complement this with a series of initiatives to strengthen the Spanish Smart Destinations Network. The actions will support digital solutions based on artificial intelligence and provide funding for developing industrial data spaces and promoting digital innovation in the tourism industry.</p> <p>Competitiveness transformation: This includes improving local tourism infrastructures and developing new tourist products. Gastronomy, especially culture and nature, includes developing new products related to traditional handicrafts and encouraging employment.</p> <p>Spain has also launched a multi-year program to rehabilitate historic heritage buildings in 2022 as part of the Recovery, Transformation and Resilience Plan for Tourism, with a budget of €208 million for 2024.</p>
Italy	Türkiye
<p>Healthy living tourism, slow tourism and sustainable tourism are encouraged with the legal regulation made in 2023 for the elderly.</p> <p>The policy also aims to promote lesser-known destinations throughout the year, reducing the impact of over-tourism and generating long-term economic benefits.</p> <p>The sustainable tourism fund has budgeted €5 million in 2023 and €10 million for 2024 and 2025 to reduce overcrowding, create innovative itineraries and de-seasonalize destinations.</p> <p>The fund will support accommodation facilities and other tourism businesses to obtain sustainability certificates. It</p>	<p>The National Sustainable Tourism Program for Türkiye has been developed.</p> <p>The program refers to sustainable management that aims to improve environmental sustainability along with socio-economic and cultural sustainability in the tourism industry.</p> <p>It is aimed for all accommodation facilities in Türkiye to fully comply with the Global Sustainable Tourism Council (GSTC) standards by 2030. In particular, water, energy consumption, waste volume, carbon footprint and greenhouse gas emission data of accommodation facilities will be monitored with the program.</p> <p>Türkiye has entered into a three-year partnership agreement with the GSTC to achieve this goal. First, Türkiye's Sustainable Tourism Criteria for</p>

<p>will also identify intermodal routes using electric transportation.</p> <p>Italy has 5,568 municipalities with less than 5,000 inhabitants, so-called Borghi villages. They have a bed capacity of 1.4 million and offer 51,000 accommodation establishments. They also attract more than 21 million visitors with 90 million overnight stays. Moreover, 64% of the 55 UNESCO sites in Italy are represented in these regions, and the seasonality of cultural tourism encourages more off-season demand, as it does not coincide with peak demand times.</p> <p>.</p>	<p>accommodation facilities, which are recognized according to GSTC standards, have been prepared. Türkiye's Sustainable Tourism Program also contributes to supporting the UN Sustainable Development Goals while maintaining the competitiveness of the tourism industry and complying with regulations and commitments such as the Paris Climate Agreement.</p> <p>The legal directive 2022/2, issued on 15 November 2022, requires all accommodation establishments to obtain at least a Stage 1 Verification in the Sustainable Tourism Program by 31 December 2023. This initiative has transformed sustainability from a voluntary concept to a mandatory approach, and there are currently more than 17,800 hotel establishments and more than 1.6 million beds in Türkiye with Sustainable Tourism Verifications and Certificates.</p> <p>Also, in 2022, Türkiye signed a three-year partnership agreement with the Global Sustainable Tourism Council to help deliver the National Sustainable Tourism Program, the first partnership of its kind at the government level.</p> <p>The program aims to increase resilience and inclusion through responsible and sustainable policies and to achieve full compliance with all international standards by 2030.</p>
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Source: Compiled by the authors from OECD, 2022; OECD, 2024.

Table 6 shows that France allocates serious budgets for sustainable tourism. France is trying to prepare for the future by making visionary plans both to complete the deficiencies in its own tourism industry and to standardize it.

It can be stated that Spain, on the other hand, has determined strategies to try to protect its values with an environmentalist sensitivity, and in addition to this, it aims to work for a sustainable tourism with both tourism diversification and digital preparations.

According to the table, it can be said that Italy plans to work more for the older generations, which we call 3rd age tourism, for sustainable tourism. At the same time, it is seen that it has made preventive and precaution-oriented plans for dangers such as overtourism, which have been heard more frequently recently. Spreading tourism to 12 months stands out as a valuable vision set by Italy.

According to the table, it can be stated that Türkiye has adopted a sustainable tourism strategy that is more inclusive and enriched with more diverse policies compared to the countries compared. However, it is also worth noting that Türkiye differs from its competitors by focusing on a singular policy that is environmentally sensitive and focused on the accommodation sector.

Table 7. Comparison of Promotion Agency Establishment and Activities in France, Spain, Italy and Türkiye

France	Spain
<p>Atout France was founded in 2009.</p> <p>At an inter-ministerial meeting on tourism in January 2018, the Agency was designated as the primary contact for project managers in the French regions.</p> <p>The Agency publishes around 10 studies for industry professionals each year. These studies are designed to expand knowledge about markets and sectors in the market and to improve development strategies.</p> <p>The Agency also organizes online courses for promotional purposes.</p>	<p>Turespaña was founded in 1985.</p> <p>Its core mission is to make Spain the world's most sought-after destination and transform it into a leading destination for environmental sustainability, social responsibility and profitability.</p> <p>The vision is to consolidate the leadership of Spain's tourism brand through the knowledge of international demand, offering personalized products for every traveler together with destinations.</p> <p>Marketing and communication is one of the three main pillars of Turespaña's work, organizing advertising campaigns, developing content, actions on social media,</p>

<p>The Agency has in-depth knowledge of various tourism markets and distribution stakeholders through close cooperation with its 32 offices and diplomatic network worldwide.</p> <p>With a team of around 1,200 tourism stakeholders from the public and private sectors, the Agency strives to develop better quality, sustainable, innovative and inclusive models to offer visitors from around the world unforgettable stays in France.</p> <p>Each year, the Agency organizes more than 2,800 promotional operations around the world for both professionals and the general public.</p>	<p>positioning in search engines, actions with influencers and other opinion leaders (press), and developing relationship marketing with consumers.</p> <p>TURESPAÑA, through PRTR - Next Generation funds, is carrying out projects to restore the historic buildings of 39 Paradores.</p> <p>Most buildings in the Paradores of Turespaña have been declared Properties of Cultural Interest, so their preservation is vital to protect Spain's cultural and tourist heritage.</p>
<p style="text-align: center;">Italy</p> <p>ENIT SpA was founded in 1919.</p> <p>ENIT SpA promotes Italy's tourist proposals and increases its attractiveness. Its activities include tourism de-seasonalization, supply diversification and optimization of tourist facilities and areas. It also promotes specialized training for operators and is developing a digital ecosystem to optimize the use of tourism products and services.</p> <p>It also promotes Italy's tourist image abroad with the participation of the regions and regional autonomous administrations. It implements national and international promotion strategies in accordance with the directives of the Ministry of Tourism, supports companies in marketing Italian tourism services and integrates quality products from other economic, cultural and environmental sectors into the industry.</p> <p>Promotes and markets Italian tourism, culture and food and wine services. It promotes the Italian brand in the tourism industry and encourages the sale of food and wine characteristics and handmade products both in Italy and abroad.</p> <p>Collaborates in the management of the 'Italia.it' portal using digital media and technological platforms. It organizes consultancy and assistance services for the State, regions, autonomous cities and various public and private organizations, standardizing information services for tourists.</p> <p>Finally, it provides support to the Ministry of Tourism both in Italy and abroad in promoting national tourism policies and training human resources in the sector, thus contributing to the growth of Italian tourism.</p>	<p style="text-align: center;">Türkiye</p> <p>The Turkish Tourism Promotion and Development Agency (TGA) was established in 2019.</p> <p>In addition to promoting Türkiye as a good brand and an attractive destination with an emphasis on cultural heritage, the Agency is also working to increase Türkiye's tourism capacity and the share of investments in the country's economy as well as the level of service quality in the short, medium and long term</p> <p>The Agency also manages promotion, marketing and communication processes, such as achieving Türkiye's tourism targets through tourism strategies and policies determined by the Ministry of Culture and Tourism and promoting existing tourism potentials and opportunities at the international level.</p> <p>TGA, an organization affiliated with the Ministry of Culture and Tourism, is subject to private law provisions. The Agency's decision-making body is the Board of Directors, and there are also Executive, Advisory and Management Boards. The Board of Directors is composed of 18 members under the chairmanship of the Deputy Minister of Culture and Tourism. The Executive Board, which is the executive body, is chaired by the Deputy Minister in charge of the General Directorate of Promotion and consists of 5 people, including the General Director of Promotion and three people selected by the Minister from among the members of the Board of Directors.</p> <p>The Turkish Tourism Promotion and Development Agency (TGA) aims to carry out all its activities in order to achieve and consolidate Türkiye's position in the international market, to ensure that Türkiye becomes an internationally recognized and talked about brand, to increase the number of tourists and tourism revenues, to facilitate the implementation of potential investment projects for the tourism industry and to contribute to the development of cities.</p>

Source: France Media Platform, 2024; Atout France, 2024; Turespaña, 2024; UTTOP, 2024; ENIT SpA, 2024; TGA, 2024.

According to Table 7, Atout France is positioned as the sole manager of tourism in France. The fact that it is appointed by the Prime Ministry as the sole authority for projects in French regions and that it directs French tourism with a huge team of 1,200 people can be considered as clear indicators that it takes extremely important responsibilities. The Agency's education-oriented operations show how much Atout France cares about sustainability.

For tourism in Spain, Turespana is not only a promotional agency, but it also works other disciplines such as the restoration of historical buildings.

In Italy, ENIT SpA is not only a marketing element, but it is also involved in different strategic missions such as reducing seasonality, the digital revolution efforts, the sale of handmade products.

When we look at the areas of responsibility of the Turkish Promotion Agency, we see that it focuses more on promotion and unlike other competitor countries, it does not have a say in decision-making roles that support sustainability. It can be said that the Turkish Promotion Agency makes decisions with a more modest team instead of a sector-oriented expert team as in France.

5. Conclusion and Recommendations

The tourism industry is such an interesting mechanism that although it seems so needy that it needs the support of every citizen living in a country, it is a powerful economic model that can develop an entire country on its own if managed with a collective understanding. In this study, evaluations were made based on the photograph presented to contribute to the economic model in Türkiye and to compare it with competitors in the Mediterranean. First of all, France, Spain and Italy were selected as the three strongest destinations in the Mediterranean basin. Then, these countries and Türkiye were compared in terms of the number of visitors, tourism revenues, tourism policies and the activities of tourism development agencies.

As a result of the study, France and Spain ranked first in terms of the number of visitors and tourism revenues generated in 2019-2022 and 2023, respectively. When looking at the national organizational structures of the tourism industry, it was found that all three competing countries include tourism stakeholders in the management process in a broader and more inclusive manner. In terms of employment data in the tourism industry, different results were obtained in the four countries, but Spain was found to be the destination with the largest workforce with 2.6 million employees. Another finding is that France, Spain and Italy have developed important policies and allocated high budgets for employment in the tourism industry. The study also found that there is a collective structure between central governments and local administrations and that Spain, Italy and France have important initiatives with large budgets in destination marketing. A destination is not only a center consisting of hotel operations, restaurants, travel agencies and historical sites such as ruins. It should be considered as a whole, and everything in the destination, including the practices, activities, attitudes of the local community, hospitality understanding and approach, and transportation facilities; in short, everything in the destination should be seen as a factor in the formation of the image. Therefore, every member of society is responsible for forming a destination image. If this awareness can be created in society and if they can act with this awareness and be included in the process, it will be possible to talk about sustainable tourism. In particular, the "unforgettable experiences in France motto" developed by France can be seen as the clearest indicator that they act with this understanding and move forward with a destination-oriented approach.

When looking at the sustainability policies of countries, it is necessary to consider and evaluate the issue from multiple perspectives. It would be more appropriate to focus on a more locally based model that can achieve the ultimate goal rather than just talking about it or moving forward through established tables. Otherwise, the process will falter, and progress will not be realized. The effective distribution of income from tourism and the level of satisfaction of stakeholders contributing to tourism is directly proportional to their motivation to work on sustainable tourism. At this point, it is seen that tourism authorities in rival countries are in close relations with tourism stakeholders operating on a local basis. Such efforts can be seen as a reason why Türkiye lags behind its competitors in terms of both the number of tourists and tourism revenues. When we consider destination marketing and sustainable tourism as a whole, collective work is inevitable, and this unity should be seen as vital. Everyone should contribute to the process. If we want to take tourism activities out of seasonality, spread tourism to 12 months, and dream of more tourists on the streets or in ruins, we need to raise the awareness of local people, businesses and service providers; in short, all the dynamics that keep the destination alive. This can be achieved through tourism awareness training. Otherwise, it is not possible to talk about sustainable tourism in a structure where local stakeholders are not involved.

In terms of the development of Turkish tourism the following suggestions can be offered to relevant stakeholders and authorities;

- Unlike its competitors, Türkiye's lack of preparation in terms of education may be one of the biggest dangers in the future, especially for Turkish tourism, which has a qualified workforce problem. Policies on tourism education should be developed urgently.

- In addition, in the policies covering employment, destination marketing and sustainability issues planned in the post-pandemic period, no preventive, precautionary or remarkable practices for global epidemics were found in the countries compared. This issue should not be kept out of sight, and if a similar situation is encountered again, the topics of what can be done, especially for employees and what measures can be taken for visitors, should be transformed into policies with solution suggestions
- The fact that the TGA focuses only on promotional activities and is more passive than its competitor countries in making important decisions that can affect the transformation of Turkish tourism can be considered a negative situation. The participation of all stakeholders, especially the TGA, should be ensured, and a multi-vocal structure should be included in the process.
- The establishment of control mechanisms through digital solutions should be accelerated in order to prevent issues that may negatively affect the image of the destination. The digital practices of France, Spain, and Italy are evident.
- Expanding tourism in Türkiye to 12 months is a topic of vital importance and it is essential that serious strategies are developed and implemented quickly.
- It would be more appropriate to focus on a sustainable tourism policy by emphasizing qualitative and unique features rather than moving Turkish tourism forward with quantitative measures such as hotel establishments, beds or agencies. In this regard, the budgets set by France, Spain and Italy can be seen as the clearest indicator of their approach.
- Comment portals, which make significant contributions to destination marketing and are frequently examined by consumers, should be examined and monitored for audit purposes, and ensuring that businesses such as hotels, agencies and restaurants provide more qualitative services will make important contributions to sustainable tourism.

As stated in every study, there are various limitations in this study. The main limitations are the findings of this study, which are mainly based on secondary data, i.e., disclosed statistics, analyzed reports and visited websites. Future studies may focus more in-depth on tourism education in countries such as France, Spain and Italy and examine in more detail the approaches of influential authorities in shaping policies. Expanding tourism to 12 months and developing policies for experience-based tourism products can make destinations more competitive. Türkiye can focus on this area.

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Araştırma Makalesi**Comparison of Tourism Policies with Statistics: The Example of Türkiye and Mediterranean Countries***Turizm Politikalarının İstatistiklerle Birlikte Karşılaştırılması: Türkiye İle Akdeniz Ülkeleri Örneği*

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Genişletilmiş Özet

2019 yılında başlayıp yaklaşık 3 yıl boyunca etkisi hissedilen Covid 19 pandemi süreci sonrası turizm endüstrisi hızla toparlanma eğilimi göstermektedir. Böylece destinasyonlar arasındaki rekabet kaldığı yerden devam etmektedir. Bu süreçte avantaj kazanmak, rakiplerle güçlü bir şekilde mücadele edebilmek için geliştirilen turizm politikalarının gerçekçi, sürdürülebilir ve ayakları yere basan sağlam uygulamalara sahip olması beklenmektedir. Bu politikaların gelişiminde ön planda daha çok ekonomik nedenler gelmektedir. Çünkü turizm, döviz getirir, girişimcilik fırsatları ile birlikte istihdam yaratır, yabancı yatırımları doğrudan gelişim gösterdiği bölgeye çekebilir, cazibe merkezi destinasyonlar yaratarak ziyaretçilerin ilgilerini bu merkezlere yönlendirerek bölgesel kalkınmayı teşvik etmektedir. Ancak plansız ve hızlı turizm büyümesi beraberinde sosyal, kültürel ve çevresel sorunları da beraberinde getirebilir. Dolayısıyla destinasyonlarda turizmin sağlıklı gelişimi için güncel parametrelerle birlikte gerçekçi ve doğru politikalar üretmek hayati önem taşımaktadır.

Akdeniz havzasında yer alan Fransa, İtalya ve İspanya gibi ülkeler için turizm endüstrisi hayati önem taşımaktadır. Türkiye açısından da önemi bilinen turizm endüstrisinde en ciddi rakipler bu Akdeniz çanağında bulunan destinasyonlardır. Dolayısıyla çalışmanın amacı, Covid19 pandemisi sonrası hızla toparlanan ve ziyaretçi sayısı ile turizm gelirini yükselten Türkiye'nin turizm endüstrisindeki güncel politikalarını küresel anlamda ön planda bulunan, Akdeniz bölgesinde konumlanan ve ziyaretçi ile gelir istatistiklerinde ilk sıralarda yer alan Fransa, İspanya ve İtalya destinasyonları ile karşılaştırılmasıdır.

Turizm endüstrisi, ziyaretçi sayısının artışı ve bu artışın gelirlere yansımalarıyla küresel anlamda büyümeye devam etmektedir. Aynı zamanda turizm, diğer sektörlerle nazaran daha fazla insanlar ile iç içedir ve odağında insan olan bir endüstridir. Bu yüzden ülkelerin işsizlik problemleri için önemli bir çözüm yolu olarak da geniş iş alanları ile turizm endüstrisi görülmektedir. Dolayısıyla turizm istihdamı; çalışma yaşına gelmiş bireyleri devlet ya da özel sektör kontrolünde, hem ulusal hem de uluslararası düzeydeki ziyaretçilere hizmet sunmaları ve geçimlerini sundukları bu hizmet yoluyla sağlamaları şeklinde tanımlamak mümkündür. Gelişimi ve büyümesi devam eden turizm endüstrisinde paralel olarak iş gücü ihtiyacı da artmaktadır ve turizm endüstrisinin istihdama önemli katkıları bulunmaktadır.

Destinasyonlarda geliştirilen stratejik amaçların başarısı, turizm paydaşları ile destinasyon arasındaki ilişkilere bağlıdır. Turizm paydaşı olarak, yerel halk yani toplum, turistler, turizm endüstrisi ve alt sektörlerin girişimcileri, kamu sektörü, hükümetler, acenteler ile birlikte tur operatörleri şeklinde sıralanabilir. Destinasyon pazarlaması için belirlenen stratejik amaçların, turizm paydaşları döngüsündeki aktörler aracılığıyla uygulanması önemlidir. Dolayısıyla, her bir paydaş kendi katkısını en üst seviyeden yapmayı hedeflemelidir.

Özellikle 2000'li yılların başından sonra sürdürülebilir turizm kavramı daha sık kullanılmaya başlanmış ve çoğu stratejik plan ve politika belgelerinde yaygın olarak atıfta bulunulmuştur. Sürdürülebilirlik, kalkınmanın temel kavramıdır ve modern dünyada muazzam ekonomik, sosyal ve çevresel etkiye sahip olan turizm

endüstrisinin gelişiminde de etkilidir. Sürdürülebilir turizm ise ziyaretçilerin talep ve isteklerini yüksek memnuniyet derecesinde koruyan, turistler için önemli deneyimler sunan, sürdürülebilirlik konusunda onların bilinçlenmesini sağlayıp farkındalıklarını arttıran ve turistik ürün ile hizmetleri birlikte geleceğe taşıma faaliyetlerini kapsamaktadır. Dolayısıyla sürdürülebilirlik, turizmin gelişiminde, planlanmasında, turizm politikalarının şekillenmesinde ve destinasyon yönetiminde ayrılmaz en temel unsurdur. Bir turistik destinasyonun gelişimi için doğal, kültürel ve çevresel kaynaklar temel unsurlarıdır. Bu nedenle bu kaynaklar, geliştirilebilecek turizm politikaları ve sorumlu bir destinasyon yönetimiyle idare edilmeli ve geliştirilmelidir. Bu çalışma, özellikle yıllık turizm verilerinde hem ziyaretçi sayılarında hem de elde edilen turizm gelirleri sıralamasında ilk sıralarda yer alan ülkelerin sürdürülebilirlik ve destinasyon yönetimi konularında uyguladıkları politikaları da karşılaştırmıştır.

Nitel araştırma yöntemlerinden doküman analizi aracılığıyla ikincil kaynaklardan yararlanılarak gerçekleştirilen çalışma yayınlanmış çeşitli raporlar, makaleler ile birlikte yayınlanan istatistiklerden faydalanmıştır. Aşağıda yer alan şu sorulara odaklanmıştır;

Araştırma şu sorulara odaklanmıştır:

1. Covid 19 pandemisi sonrası ilgili ülkelerde ziyaretçi sayısı istatistikleri nasıl şekillenmiştir?
2. Covid 19 pandemisi sonrası ilgili ülkelerde turizm gelirleri nasıl şekillenmiştir?
3. Turizm endüstrisi faaliyetleri hangi Bakanlığa bağlı olarak gerçekleştirilmektedir ve ulusal düzeyde turizm organizasyon şeması nasıl oluşmuştur
4. Turizmde doğrudan istihdam edilen kişi sayısı ne kadardır ve çalışanların toplam istihdama katkı yüzdesi ne kadardır?
5. İlgili ülkelerde genel merkez ile yerel yönetimler arasındaki iş birliği ilişkisi nasıl tanımlanmıştır?
6. İlgili ülkelerde turizm endüstrisi için istihdam politikalarında öne çıkan başlıklar nelerdir?
7. İlgili ülkelerde uygulanan destinasyon pazarlama politikalarında öne çıkan başlıklar nelerdir?
8. İlgili ülkelerde turizmde sürdürülebilirlik politikaları nasıl şekillenmiştir?
9. İlgili ülkelerde tanıtım ajansları ne zaman kurulmuştur ve ajans faaliyetleri nelerdir?

İncelenen dört ülke arasında 2019, 2022 ve 2023 yıllarının tamamında en fazla turist ağırlayan ülkenin Fransa olduğu belirlenmiştir. Pandemi öncesi en fazla turizm geliri elde eden İspanya, pandemi sonrasındaki 2022 yılında yaklaşık 7 milyar USD'lik gerileme yaşasa da 2023 yılında hızlıca toparlanarak turizm gelirini zirveye taşımıştır.

Fransa'da turizm, Ekonomi ve İşletme Genel Müdürlüğünün kontrolünde faaliyet göstermektedir. İspanya'da turizm endüstrisi Ekonomi Bakanlığı ile ortak yönetilmekte olup bu birliktelik sayesinde yerel turizm paydaşlarıyla turizm bakanlığı arasındaki ilişkilerin çok daha hızlı ilerlediği ve doğru yönetilmesi adına avantaj sağladığı belirlenmiştir. İtalya'da turizm endüstrisi hiyerarşisinde de İspanya'daki gibi "Advisory Councils-Tavsiye Kurulu" ile diğer bakanlıklar ve yerel turizm paydaşları arasında koordinasyon sağlandığı orataya çıkmıştır. Türkiye'nin organizasyon yapısında turizm yönetimi için daha merkeziyetçi bir yapının söz konusu olduğu söylenebilir.

Turizm endüstrisinde en çok çalışana sahip ülke 2,6 milyon ile İspanya olurken onu 2,1 milyon turizm çalışanı ile İtalya takip etmektedir.

Turizm, Fransa için ortak yetkinlik gerektiren bir endüstri olarak kabul edilmektedir. İspanya'da genel turizm yönetimleri ile yerel turizm yönetimleri arasındaki koordinasyonun çok geniş bir yelpaze de ilerlediği tespit edilmiştir. İtalya'da Ulusal Turizm Ajansının sektörle sürekli olarak toplantılar yapması turizm endüstrisini tüm paydaşlarıyla birlikte değerlendirmesi İtalya'nın turizm endüstrisini kolektif bir şekilde yönettiğinin en belirgin göstergesidir. Türkiye'nin turizm hiyerarşi yapısı, Tablo 1'de açıkça görüldüğü üzere diğer ülkelere nazaran daha az bileşenden oluşmaktadır.

Türkiye'nin rakipleri istihdam başlığında çeşitli stratejiler geliştirerek bu zaruri ihtiyacı giderme noktasında planlamalar yapmışlar ve politikalar geliştirmişlerdir. Özellikle İtalya'nın ayırmış olduğu bütçeler ve turizmde istihdama yönelik sektörel bazdaki iyileştirme çabaları Türkiye'nin rakip ülkelerinde konunun ne kadar önemli görüldüğü ve ciddi bir yaklaşım gösterildiğinin belirtisi olarak değerlendirilmiştir.

Destinasyon pazarlaması ile ilgili olarak Fransa, Destination France planı ile hizmet sunma gayretindedir. İspanya'nın yarımada dışı bölgelere yoğunlaşarak turizmi coğrafi açıdan zenginleştirmeye çalışmakla kalmayıp şarap ve gastronomi başta olmak üzere farklı turizm türlerine yönelik çalışmalara yoğunlaştığı belirlenmiştir. İtalya'nın destinasyon pazarlama faaliyetleri içinde öne çıkan başlıklardan önemlisi Tourism Dijital Hub uygulamasıdır. Türkiye'nin Tablo 5'te görüldüğü üzere pazarlama iletişimi kapsamında destinasyon pazarlamasına devam edeceği ve dijital kapsamda iyileştirmeler yapacağı söylenebilir.

Sürdürülebilir bir turizm adına Fransa'nın ciddi bütçeler ayırdığı belirlenmiştir. İspanya'nın ise çevreci bir hassasiyetle sahip olduğu değerleri korumaya çalışmak üzerine stratejiler belirlediği ortaya çıkmıştır. İtalya'nın sürdürülebilir turizm için daha çok 3.yaş turizm dediğimiz ileri yaş jenerasyonlara yönelik çalışmalar planladığı tespit edilmiştir. Türkiye'nin karşılaştırılan ülkelere nazaran daha kapsayıcı ve daha çeşitli politikalarla zenginleştirilmiş bir sürdürülebilir turizm stratejisi benimsediği gözlenmiştir.

Fransa için Atout France, turizmin tek yöneticisi olarak konumlandırılmıştır. İspanya turizmi için Turespana, sadece tanıtım ajansı olarak değil bunun yanında tarihi binaların restorasyonu gibi farklı disiplinler için de görev yaptığı görülmektedir. İtalya'da ENIT SpA'nın sadece pazarlama unsuru olarak değil aynı zamanda mevsimselliği azaltmak, dijital devrim çabaları, el yapım ürünlerinin satışı gibi farklı stratejik misyonlar içinde bulunduğu belirlenmiştir. Türkiye Tanıtım ajansının sorumluluk alanı olarak gördüğü konulara bakıldığında daha çok tanıtımaya odaklandığı ve diğer rakip ülkelerin aksine sürdürülebilirliği destekleyen karar alıcı rollerde söz sahibi olmadığı tespit edilmiştir.

Destinasyon pazarlaması ile sürdürülebilir turizmi bir bütün olarak değerlendirdiğimizde kolektif bir çalışma kaçınılmazdır ve bu birliktelik hayati olarak görülmelidir. Sürece herkesin katkı sunması gerekir. Başta TGA olmak üzere tüm paydaşların katılımı sağlanmalı, çok sesli bir yapı olarak sürece dahil edilmelidir. Ayrıca destinasyonun imajını olumsuz etkileyebilecek sorunların önlenmesi amacıyla dijital çözümlerle kontrol mekanizmalarının kurulması hızlandırılmalıdır. Turizm faaliyetlerini mevsimsellikten çıkarmak, turizmi 12 aya yaymak, sokaklarda ya da ören yerlerinde daha fazla turist hayal ediliyorsa başta yerel halk, işletmeler ve hizmet sunan tüm kesimler, kısaca destinasyonu canlı tutan tüm dinamikler bilinçlendirilmelidir. Bu da turizm farkındalık eğitimiyle gerçekleştirilebilir. Aksi halde yerel paydaşların dahil olmadığı bir yapıda sürdürülebilir turizmden bahsetmek mümkün değildir.