



Republic of Turkey  
Prime Ministry  
Undersecretariat of  
State Planning Organization



Japan  
International Cooperation Agency  
JICA

# Eastern Black Sea Region Tourism Development Study

VOLUME II

## FINAL REPORT APPENDICES

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# **Eastern Black Sea Region Tourism Development Study**

## **VOLUME II: APPENDICES**

# **Eastern Black Sea Region Tourism Development Study**

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## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX A : PROJECT ORGANISATION**

# Eastern Black Sea Region Tourism Development Study

## Steering Committee Members

- İsmail Sarıca  
Undersecretariat of SPO  
GD of Regional Development and Structural Adjustment
- Yasushi Inaba  
JICA Turkey Office  
Resident Representative
- Hülya Örs  
Undersecretariat of SPO  
GD of Economic Sectors and Coordination  
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Regional Development  
Expert
- Abdurrahman Savaş  
Ministry of Interior  
Department of Research, Planning and Coordination  
Head of Department
- Aiko Oki\*  
JICA Turkey Office  
Senior Volunteer
- Sinan Öz  
Ministry of Culture and Tourism  
GD of Investments and Establishments  
Architect
- Assoc. Prof. Dr. Emin  
Özdamar  
JICA Turkey Office  
Head of Technical  
Cooperation Division
- M. Sait Yorulmaz  
Ministry of Environment and Forest  
GD of Natural Conservation and National Parks  
Department of Natural Conservation  
Section Head
- Eser Canalıoğlu  
JICA Turkey Office  
Assistant Researcher
- Ali Temerit  
Ministry of Environment and Forest  
GD of Forest  
Department of Research, Planning and Coordination  
Section Head
- Bilgin Yılmaz  
Artvin Governorship  
Provincial Directorate of Culture and Tourism  
Director
- Mürsel Bostancı  
Giresun Governorship  
Provincial Directorate of Culture and Tourism  
Deputy Director
- Dursun Ali Emir  
Gümüşhane Province Governate  
Director of Culture and Tourism  
\*Observer

- İlhami Polat  
Ordu Governorship  
Provincial Directorate of Culture and Tourism  
Deputy Director
- Gürkan Avcılar  
Rize Governorship  
Provincial Directorate of Culture and Tourism  
Director
- M. Volkan Canalıoğlu  
Trabzon Governorship  
Provincial Directorate of Culture and Tourism  
Director
- Ali Rıza Uzuner  
KÖK Association  
President
- Nevzat Özer  
TEMA Foundation  
Rize Representative
- Ali Rendan  
Turkish Travel Agencies Union(TÜRSAB)  
Advisor of General Secretary

### **Project Team**

<p>A. Saffet Atik</p> <p>Osman Akyel</p> <p>Nezih Kuleyin</p> <p>Yalçın Doğaner</p> <p>Ümit Bilge</p> <p>Güneş Oktay</p> <p>Türker Ulubağ</p> <p>Murat Özden</p> <p>Ekrem Atik</p> <p>Ayşe Özge Oyan</p> <p>Ulca Özcanlı</p>	<p>Project Leader – Urban and Regional Planner</p> <p>Tourism Expert</p> <p>Socio-Economy Development Expert</p> <p>Rural Development Expert</p> <p>Eco-tourism Expert</p> <p>Rural Tourism and Agro-Industry Expert</p> <p>Urban Planner</p> <p>Urban Planner</p> <p>Computer Aided Design and Drawings</p> <p>Hotel and Tourism Management (Support)</p> <p>Hotel and Tourism Management (Support)</p>
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### **Trainers of Public Awareness Meetings and Tourism Training Seminars**

<p>Assistant Prof. Dr. Aydın Tüfekçi</p> <p>Assistant Prof. Dr. İsmail Kızılırmak</p> <p>Nihan Arpa</p>	<p>Kafkas University - Artvin Faculty of Forest</p> <p>Karadeniz Technical University - Trabzon School of Tourism</p> <p>Ministry of Environment and Forests</p>
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## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX B: STAKEHOLDER MEETINGS**

## Results of Stakeholder Meetings

The views, expectations, recommendations and the relevant roles of the local people and the project partners on the measures to be taken towards the mobilization of the appropriate resources and alleviation of the constraints are researched and analyzed through a series of stakeholders meetings.

The agenda for these meeting are the items outlined above. Rural development, agro-industry and handcraft man-ship issues are also addressed and their existing and potential contributions towards the development of the tourism sector are assessed in workshops organized.

### Trabzon Stakeholders Meeting

Trabzon stakeholders meeting was held by 107 attendants representing different public sector entities, private sector establishments, NGO's and other interest groups. One of the important outcomes of the meeting is the emphasis put on the existing problems rather than on the opportunities and relative future roles of the partners in the process.

The issues raised and relative views that emerged at this meeting are as follows:

#### A. Opportunities;

- i. Trabzon and the Region portray many of the opportunities for the development and diversification of tourism. All kinds of nature and eco tourism activities rank first in this respect.
- ii. The existing airport in Trabzon is an important opportunity and thus an asset. This airport serves as the "gate" to the Region.
- iii. Trabzon is ready to assume the initiative role for the development of tourism in the Region.
- iv. Favorable conditions exist for the development of sports tourism.
- v. Agriculture is losing its importance in the regional economy. Tourism is emerging as the main alternative as a source of income especially in the inner parts.

#### B. Problems & Constraints;

- i. Access to the region is difficult. This drawback presents itself as the main obstacle for the development of tourism in the Region. In this respect, the physical conditions of the existing highway & road system is of primary importance. Rural village roads are well below acceptable levels of quality. All access roads to the plateaus that present opportunities for the development of alternative tourism are either stabilized roads or dirt roads except the access to Sümela and Uzungöl. Air transport is insufficient. No utilization of sea transport is employed. The traditional Black Sea cruises by ships and ferryboats have been terminated.
- ii. Service level of urban and rural infrastructure is insufficient. Especially, wastewater treatment and solid waste disposal present themselves as the immediate action required problem; there is not one present adequate wastewater treatment or solid waste disposal system in any city. These issues are worse in plateaus.
- iii. The level and pace of inappropriate building in the plateaus is a problem and a man-introduced obstacle for the development of tourism
- iv. There is no seriously conducted environmental impact assessment study for Black Sea Dual Highway. As being built, the highway line is not correctly situated. The social, environmental and economic disadvantages of this highway should be assessed and should be included in any agenda that addresses its advantages.
- v. Even though the local people generally have a positive attitude towards tourism, training is required.



- vi. The tourism sector is not institutionalized. There is a very low level of inter-institutional cooperation and flow of information.
- vii. Promotional and PR activities are not adequate. There is no participation in tourism fairs organized elsewhere.
- viii. Incentives in the sector are not adequate. They are not geared towards the needs of the Region. Major incentives are formulated for already developed areas of the Mediterranean and Aegean coasts.
- ix. The problems of land ownership especially in the plateaus. This situation creates uncertainties and adversely affects the investors' decisions.
- x. The bureaucratic procedures proceed slowly during investment and operation stages.
- xi. Coastal areas where tourism facilities can locate are already used by public institutions' facilities.
- xii. Important problems arise due to different attitudes to tourists from different countries. This results in the decrease in the number of tourists. Tourism for shopping and business has virtually stopped.

### C. Expectations & Demands;

- i. There must be solutions to the problems associated with accessibility and infrastructure. This issue is totally in the domain of the public sector. Private sector does not have the necessary resources to invest in these areas.
- ii. The main responsibility of the public sector should be the provision of adequate infrastructure. Private sector can only commence investment after this provision.
- iii. Cable transport is the most appropriate type of transport in high altitudes and plateaus.
- iv. Private sector aviation should be promoted.
- v. New urban design and implementation is required for the port and the surrounding areas.
- vi. Sea transport should receive the attention it requires.
- vii. Public incentives are required for restoring the old buildings and making them available for tourism use.
- viii. The region should be a destination point rather than a transition point during the tour. This will increase the number of nights spent.
- ix. Training in tourism, on the job training and training activities towards the increase of public consciousness on the virtues of tourism is required as well as providing the framework for trained manpower to be employed in the sector.

#### **Participants of Trabzon Stakeholders Meeting held in October 17, 2003**

	<b>Name</b>	<b>Institutions</b>
1	Arslan Yıldırım	Trabzon Governor
2	Nihat Canan Yakıcı	Directorate of Security
3	Niyazi Sürmen	Trabzon Municipality
4	Bekir Dıncırcı	Akçaabat District Governor
5	Bülent Kılınç	Of District Governor
6	A. Fuat Türker	Araklı District Governor
7	H. İbrahim Acır	Sürmene District Governor
8	M. Kamil Sağlam	Beşikdüzü District Governor
9	Ekrem İnci	Çarşıbaşı District Governor
10	Yomra Kaymakamı	Yomra District Governor
11	Hulusi Şahin	Arsin District Governor
12	Dernekpazarı Kaymakamı	Dernekpazarı District Governor
13	Mehmet Yeşilbaş	Düzköy District Governor
14	Rıfat Altan	Tonya District Governor
15	Raci Akbay	Directorate of Social Affairs
16	Şerif Özgür	Directorate of Youth and Sports

17	Salih Özkan	Directorate of Press and Public Relations
18	Mahmut Yıldırım	Directorate of Local Authorities
19	Güliden Ünal	Directorate of Foundation of Social Aids
20	Muhammet Mazlum	Directorate of Environment and Forests
21	Turgut Balık	Regional Directorate of Forests
22	Dr. Mahir Küçük	Directorate of Eastern Black Sea Forestry Research
23	Murat Bakkaloğlu	Directorate of Forest Soil Laboratory
24	Safiye Demirbaş	Directorate of Foundation of Environmental Conservation
25	Kemal Kazaz	Directorate of Planning and Coordination
26	Sükrü Erçin	Trabzon Port Operations
27	Hasan Volkan Kantarcı	Ey-Ce Tourism
28	Kemal Kazaz	Directorate of Planning and Coordination
29	İlyas Genç	Fettahoğlu Tourism
30	Mehmet Sözen	Sözenler Forest Products
31	Yılmaz Odabaş	Chamber of Electrical Engineers
32	Yüksel Yavuz	Chamber of Electrical Engineers
33	Selvin Orman	Burcum Tourism
34	Aydın Kurnaz	Burcum Tourism
35	Nevzat Özer	Tema Foundation Rize Representative
36	Kadir İnan	Uzungöl Municipality Mayor
37	Nuray Kansız	National Productivity Center
38	Derya Sönmez	Miranda Tourism
39	İsmail Sezgin	Sezgin Motel
40	Değer Danışmanlıoğlu	Horon Hotel
41	Kemal Yılmaz	Gürgen Tour
42	Suat Hacısalihoğlu	Lions Club
43	Recep Atılsay	Kargid
44	Okan Şeker	Kargid
45	Şadan Eren	Chamber of Commerce and Industry
46	Nevzat Akman	Chamber of Pharmacists
47	Mustafa Yazıcı	Uzungöl Associations Main Office (Center)
48	İsmet Güven	Vakfikebir Hotel
49	Bahattin Çelik	Ceyhun Tour
50	Hüseyin Bayrak	Trapeza Hotel
51	Metin Minzanalı	Horon Hotel
52	Taner Demirbulut	Usta Tourism
53	Murat Kaban	Anadolu News Agency
54	Gökhan Usta	Usta Tourism A.Ş.
55	Kasım Şahin	Coşandere Tourism Facilities
56	Şebnem Akın Acuner	National Productivity Center
57	Mestan Deniz	Ministry of Interior
58	Bekir Sami Emiroğlu	Directorate of Press and Public Relations
59	Adnan Aydın	Zitaş
60	Metin Kart	Tradesmen and Artisans Credit Cooperative
61	İsmail Yazıcı	
62	Ahmet Hamdi Mayir	Sürmene District Governor
63	Ersan Bocutoğlu	Black Sea Technical University
64	İsmet Güven	Vakfikebir Best Hotel
65	Salih Kul	Kuloğlu Hotel and Rest.
66	Gönül Çağdaş	ÇYDD Trabzon Branch
67	Nermin Canalıoğlu	ÇYDD Trabzon Branch
68	Salim Şahin	Coşandere Tourism Facilities
69	Cemil Melek	TÜRSAB
80	Ali Çankaya	Water Products Research Institute

81	Suat Gürkök	TÜRSAB
82	Dursun Ali İnan	İnan Tourism Facilities
83	Adnan Aydın	Zitaş
84	Mustafa Akyüz	Eastern Black Sea Forestry Research Institute
85	Tayfun Erpek	Trabzonspor Club
86	Mehmet Yıldız	Köprübaşı District Governor
87	Aydın Memük	Yomra District Governor
88	Gürsel Gençsoy	Association of Villages and Districts Headmen
89	Mehmet Öncel	Directorate of Culture and Tourism
90	Ziya Gerçek	Black Sea Technical University
100	Ayhan Sürmen	Chamber of Mechanical Engineers
101	Numan Çam	Regional Directorate of Meteorology
102	Miraç Dural	Trabzon Chamber of Commerce and Industry
103	Halil İbrahim Kalfaoğlu	Union of Chamber Tradesmen and Artisans
104	Recep Atasoy	KARGİAD
105	Orhan Aksu	Afacan Tour
106	Tuncer Çolakoğlu	Haşimsayitoğlu Insurance
107	Volkan Canalıoğlu	Directorate of Culture and Tourism

### **Artvin Stakeholder Meeting**

There were 62 participants in the meeting. The issues raised and related views are given below:

#### **A. Opportunities;**

- i. Artvin portrays great potential in tourism with its natural riches and especially old forests.
- ii. Artvin is one of the provinces where eco-tourism activities initially commenced. The examples are the Çoruh River rafting circuit and mountain climbing on the southern slopes of Kaçkar Mountain.
- iii. Like Mount Kaçkar, Karçal Mountain can also be utilized for eco-tourism.
- iv. An important advantage is the local people's positive attitude to tourism.
- v. Sarp border gate is an important potential for incoming tourists.
- vi. The proximity of the province to Erzurum, Kars and Ardahan that lie on the tour routes is also an important advantage.
- vii. Tourism gains importance due to the limited available areas for urban expansion and limited agricultural land. Local people are aware of this fact.
- viii. The dam lakes of Borçka and Deriner Dams can be utilized for tourism.
- ix. Kemalpaşa (Hopa) beach is the longest beach in the Region and is appropriate for mass tourism.

#### **B. Problems & Constraints;**

- i. Artvin is the province in the Region with the most difficult access. Its distance to the closest airports (Trabzon and Erzurum) is 4 hours by road. The rural roads are low in quality. Yusufeli – İspir Road that carries importance in tourism is below standard. The dam construction activities in the Çoruh Valley make accessibility worse. The traditional cruise by sea to Hopa has been terminated.
- ii. An important location for tourism, Yusufeli district center, will be under the dam lake. Whether Kızılkaya or Öğdem will be the "new Yusufeli" is not specified yet. Such uncertainty causes inaction in terms of investors.
- iii. The dams to be constructed on the Çoruh Valley adversely affect the environment and existing eco-systems.

- iv. Urban and rural infrastructure is insufficient. There is a big problem associated with proper sanitation and solid waste disposal in the plateaus.
- v. Due to insufficient financial resources of the province, the quality and appropriate promotion and marketing of the facilities is adversely affected. An example to this situation is the “Mount Kaçkar climb” and “plateau trekking” activities that use the accommodation facilities at both Ayder (Çamlıhemşin) and Yusufeli. The price at Ayder is 40-50 Euro/room/night whereas this price falls down to 5 Euro/room/night at Yusufeli.
- vi. The local products are not known with local names and are not marketed with local names. An example to this is the “Caucasian honey” produced in Artvin but marketed as “Rize honey”.
- vii. Due to their location in military zone, necessary permits from the military authorities is a must to visit the touristic places of Camili and other settlements located near Mount Karçal.
- viii. The attitudes to the same nationalities differ in developed regions such as Antalya and in the Region. This varying attitudes in different regions to the same passport holder creates misperceptions.
- ix. The sector is not institutionalized. There is no cooperation between the institutions and flow of information is non-existent. Promotion and PR activities are negligible. There is no participation to fairs organized elsewhere.
- x. The same problem voiced in Trabzon with regard to the land ownership problems also exist in the plateaus of Artvin.

#### C. Expectations & Demands;

- i. Urgent decision is required with respect to the new location of Yusufeli district center.
- ii. Easy access to the area should be provided.
- iii. Negotiations with Georgian authorities should be conducted to enable transit passage of tourists from Batum Airport to Artvin.
- iv. Public sector vocational and on the job training programs are required.
- v. Public sector should assist the promotion and PR of the area.
- vi. Attitudes to tourists should not be based upon their nationality.
- vii. The procedures for entry through Sarp border gate should be simplified and entries should be encouraged.

#### Participants of Artvin Stakeholders Meeting held in October 23, 2003

	<b>Name</b>	<b>Institutions</b>
1	Mustafa İlhan	Director of Security
2	Akın Varicier	Arhavi District Governor
3	Ahmet Kantar	Yusufeli Yaylalar Village Headman
4	Ayhan Tekin	Provincial Director of Social Services
5	Nazım Utlu	Directorate of Meteorology
6	Mustafa Meydan	Regional Director of Forests
7	Ender Güngör	Artvin Tourism Operations Association
8	Sıralı Aydın	Yusufeli Ski Rafting and Climbing
9	Şerif Şentürk	Borçka Karagöl Pension Operator
10	Yüksel Yılmaz	Black Sea Tent Operation
11	Sinan Ali Ulusoy	Hopa Chamber of Commerce and Industry
12	Bülent Akbas	Park Sea Operations
13	Oğuz Kurdoğlu	Director of Research Institute Eastern Black Sea Forestry
14	Erhan Yavuz	Camili
15	Osman Uzet	Camili
16	Hızır Atar	Borçka Karagöl Pension Operator
17	Necmi Asuman	Association of Huntsman and Marksmanship
18	Sadi Yıldızhan	Arhavi Chamber of Commerce and Industry

19	Etem Boz	Provincial Director of Environment and Forest
20	A. Emin Meydan	Forest Operation
21	Suat Horazalođlu	Arhavi Municipality Deputy Mayor
22	Yavuz Karahan	Hotel Manager
23	İsmail Hakkı Civil	Director of Security
24	Sahin Arslan	Hopa District Governor
25	Arif Simsek	Provincial Director of Youth and Sports
26	Ahmet Keles	Hotel Representative
27	Ah-Met Pehlivan	Pensioner
28	Efkan Özgen	Peronti Hotel
29	Mahir Dudak	Municipality Mayor
30	Casim Cihan	Gefiki
31	Akın Polat	Guide
32	Yücel Akın	Chamber of Drivers
33	Yasin Basalmaz	Press
34	Yasar Yađcı	Operator
35	Bülent Yılmaz	Hotel Manager
36	Nusret Özer	Ađasın Hotel
37	İsmet Özek	Ađasın Hotel
38	Sadık Şahin	Kemalpaşa Municipality Mayor
39	Sıralı Aydın	Hotel Manager
40	Nizamettin Yılmaz	Kemalpaşa Municipality
41	Binalı Aydın	Hotel Manager
42	Ender Güngör	Turizm Association Chairman
43	Kenan Bayraktar	DOKAP
44	Ayşe Canuyar	DOKAP
45	İsmail Altınay	Tourism Professional
46	Hayati Akbaş	Representative
47	Z.Bilgi Buluş	GEF
48	İsmail Koç	
49	Selim Bilgin	Artvin Municipality Public Relations
50	Turgut Gümrükçü	DHA
51	Ertekin Çolak	Provincial Agriculture Director
52	Ahmet Varan	TSO Chairman
53	Bilgin Yılmaz	Artvin Director of Culture and Tourism
54	Muhammer İhtiyar	Yusufeli Ski Rafting and Climbing
55	B. Turan	Celik
56	Mehmet Aydın	Terziođlu Hotel
57	Muammer İhtiyar	İhtiyarođlu Farm
58	Bahri Calık	Operator
59	Nedim Sinancı	Yusufeli Huntsman Association
60	T.Ahmet Sensilay	Tourism Consultant
61	Zafer Gungut	Savsat Culture and Tourism Association
62	Bülent Cihan	Flaş Hotel

## Rize Stakeholders Meeting

There were 62 participants in Rize meeting. The issues raised and views presented are given below.

### A. Opportunities;

- i. Rize is one of the province centers in which eco- tourism and alternative tourism have initially commenced. Natural and cultural riches of the province have been allocated to the utilization by the tourism sector.
- ii. Mount Kaçkar climbing and trekking paths are well known and rank first in the country. Mount Kaçkar is one of the well known mountains in the country.
- iii. Even though Rize is a small province in scale, it encompasses different types of tourism potentials such as sea, baths, forests, plateaus, mountain peaks and historical ruins.
- iv. The proximity to Sarp border gate and Trabzon Airport is an important asset.
- v. Rize local people are well known for their capability in food and pastry. Many of the employees of the large restaurants and patisseries in large cities are people from Rize. This special capability can easily be utilized locally for purposes of tourism.
- vi. In large cities of the country, there are also important entrepreneurs that are originally are from Rize. This potential can be utilized for investment in Rize.
- vii. Another opportunity is the port and the fisherman's wharf.

### B. Problems & Constraints;

- i. As with the other provinces in the Region, the most important problem and constraint to development is the difficulties in accessing the province. Sea transport is not being utilized.
- ii. Another constraint to development is the scarcity of developable land.
- iii. Again as in the other provinces, land ownership problems present itself as a major difficulty. There are vast areas of land in the mountains and plateaus where no cadastral studies and applications are finalized yet.
- iv. Insufficient level of urban and rural infrastructure is another problem.
- v. Local people's level of knowledge in tourism is not adequately developed except in Ayder.
- vi. Local people fear that local culture and local identity may be adversely affected by tourism activities.

### C. Expectations & Demands;

- i. Improved access to the province is a must.
- ii. The utilization of Batum Airport should be researched.
- iii. All plateaus in the province are as attractive as Ayder but they are not known. Examples to this situation are the plateaus on the slopes of Mount Kaçkar (Pakut and Elevit plateaus) and of Mount Ovit. These are difficult to access and are only known by the local people
- iv. Land ownership problems and cadastral registration should be addressed immediately.
- v. Vocational and on the job training should be given to public sector employees. Public sector should initiate and support the promotional and PR activities.
- vi. The procedures for entry through Sarp border gate should be simplified and entries should be encouraged.

### Participants of Rize Stakeholders Meeting held in October 24, 2003

	<b>Name</b>	<b>Institutions</b>
1	Osman Öztürk	Directorate of Security
2	Hızır Hop	Rize Municipality
3	Cahit Işık	Ardeşen District Governor
4	Nihat Kaynar	Çayeli District Governor
5	H.Bilge Aktaş	Pazar District Governor
6	A.Turgay İmamgiller	Fındıklı District Governor
7	Ismail Bayata	İkizdere District Governor
8	Mustafa Yıldız	Güneysu District Governor
9	Cem Hakan Karaduman	Kalkandere District Governor
10	Ünal Erdemli	Provincial Directorate of Youth and Sports
11	Mehmet Tunalı Gezmis	Provincial Directorate of Social Services
12	Kemal Katmer	Provincial Directorate of Local Authorities
13	Mehmet Uzuner	Provincial Directorate of Planning and Coordination
14	Koksal Hapeloğlu	Rize Culture and Tourism Association
15	Neşe Hasanoğlu	Rize Coast Health Control Center
16	Osman Hasimoğlu	Ayder Plateau
17	Mehmet Azıcı	Ayder Plateau
18	Adnan Ozgur	Dedeman Rize Hotel General Manager
19	Gultekin Merdamert	Secretary General of Union of Chambers of Tradesmen
20	Mehmet Orun	Youth and Sports Department Director
21	Nevzat Özer	Tema Foundation
22	Erkan Akalin	Provincial Directorate of Agriculture
23	Cahit Gulbay	Provincial Directorate of Agriculture
24	Safak Bulut	Provincial Directorate of Agriculture
25	Sedat Evci	Provincial Directorate of Agriculture
26	Ramazan Aydoğan	Hotel Tiflis
27	Ahmet Yavuz Dal	Press
28	Ömer Sam	Press
29	Ayhan Hacı Fazlıoğlu	Chairmanship of Chambers of Commerce and Industry
30	Halit Duman	Hotel Keles
31	Hasan Unsal	Environment and Forest
32	Enver Toprak	Director of Culture
33	Atilla Karahasanoğlu	Tourism Professional
34	Necip Albayrak	Director of Tourism
35	Bayram Murat Ali Sari	Cay Tv
36	Feridun Celik	Chairmanship of Rize Port
37	İrfan Uzun	Association of Sea Cleansing
38	Özgür Kambur	Rize Tv
39	Ziya Memişoğlu	Memisoğlu Hotel

### Ordu Stakeholders Meeting

Ordu meeting was held with 36 participants. The issues raised and views presented are given below.

#### A. Opportunities

- i. Ordu is located at a closest distance to large cities in the Region by highway. It is also a starting point for East Black Sea tours and the west gate of the Region.
- ii. During the East Black Sea tours, first stays are done in the province of Ordu.
- iii. In addition, Ordu is the first regional province which has opened to tourism and has been a pioneer of the Ünye-Çamlık tourism movement.
- iv. The regional people have significant expertise and skills in tourism.

- v. Connections exist on the North-South line. From this point of view, Ordu has the richest opportunities in the Region.
- vi. Accessibility of major plateaus by asphalt roads is an important opportunity.
- vii. Nearness to the Samsun-Çarşamba Airport is another important opportunity. By the Black Sea divided highway, the time distance will be further shortened.
- viii. Fatsa seaport and other fishers' shelters are yet other important opportunities.

#### B. Problems & Constraints

- i. Distance to large cities is an important problem as in other provinces.
- ii. Limited number of developable areas is a significant bottleneck.
- iii. Plateaus are proclaimed tourism centers and development plans were prepared but not approved.
- iv. Ownership problems exist in plateaus.
- v. A serious lack of infrastructure exists in urban and rural areas. For example, 4-5 towns discharge their waste water into Bolaman stream.

#### C. Expectations & Demands

- i. Ease of access to the province of Ordu will add to the dynamism of tourism.
- ii. There are important plateaus in the province of Ordu. For example, plateaus named Turnalık (45 km, asphalt), Çambaşı (60 km, asphalt), Perşembe (127 km, asphalt), Keyfalan (125 km, stabilized) and Yeşilce-Topçam (60 km, asphalt) have features eligible for opening to tourism. However, they lack infrastructure, especially sewerage, which is a significant deficient. This problem must be solved.
- iii. The public sector must provide in-vocation training and assist in the promotion of the province.
- iv. Tourists must be treated without distinguishing between their nationalities.

#### Participants of Ordu Stakeholders Meeting held in November 3, 2003

	<b>Name</b>	<b>Instutions</b>
1	Salih Bıçak	Ordu Deputy Governor
2	Ayşe Bahar Çebi	Ordu Municipality
3	Ali Bakoğlu	Ünye District Governor
4	Salih Gürkan	Fatsa District Governor
5	Uğur Turan	Perşembe District Governor
6	Şenol Koca	Perşembe District Governor
7	Cahit Çelik	Gülyalı District Governor
8	Kemal Yıldız	Mesudiye District Governor
9	İlhami Polat	Provincial Directorate of Culture and Tourism
10	Selahattin Aydın	Provincial Directorate of Environment and Forests
11	Ayşen Özen	Provincial Directorate of Youth and Sports
12	Mehmet Tarakçı	Provincial Directorate of Social Services
13	Fehmi Küpçük	Aybastı Municipality
14	Uğur Cörüt	Gülyalı Municipality
15	Mahmut Ali Akkiraz	Korgan Municipality
16	Mustafa Demir	Mesudiye Municipality
17	Kamil Ertekin Çolak	Perşembe Municipality
18	Nadir Var	Camlı Municipality
19	Erdoğan Yeni	Turist Hotel
20	Ahmet Çavuşoğlu	Belde Hotel
21	İdris Yıldız	Belde Hotel
22	Şafak Ergin	Hotel Grand Kuşcalı
23	Mehmet Ergin	Kuscalı Tourism Hotel
24	Ülkü Okumus	Okumus Tourism and Travel Agent



25	Nilgün Gözükan	Tema Foundation
26	Prof. Dr. Y. Nurettin İsmailçelebioğlu	Black Sea Technical University Agriculture Faculty
27	Ersin Erdoğan	Denizkızı Hotel
28	Cengiz Keskin	Ortid
29	Adnan Sobi	Ünye Mavi Deniz Touristic Facilities
30	Rustu Bas	Ordu Nature Activities Association
31	Aycan Onur	Yalçın Hotel
32	Bülent Savaşkan	Chamber of Commerce and Industry
33	Uğur Toparlak	Provincial Directorate of Culture and Tourism
34	Ertan Kutuban	Natural Conservation and National Parks
35	Mustafa Aydın	Chamber of Tradesmen
36	Cumhur Sancaktar	Hotel Hasanbey

### **Giresun Stakeholders Meeting**

Giresun meeting was held with 35 participants. The issues raised and views presented are given below.

#### **A. Opportunities**

- i. Giresun is a peculiar province where alternative tourism could develop owing to the extraordinary beauties of its shores and plateaus.
- ii. Seaports and fishers shelters along the shore provide suitable environments for the development of yachting tourism.
- iii. Plateaus in the inland parts of the province house assets such as the Giresun Range, summits and historic works of art.
- iv. With the construction of Bolaman tunnel, which is included in the Black Sea State Divided Highway alignment and the under the Black Sea Project, the time distance will be shortened. This will increase chances for access to Giresun and accommodation of tours.
- v. The Island of Giresun is the one single island in the East Black Sea Region. For this reason, it is an opportunity and an object for tourism. Vessels can land at the island.

#### **B. Problems & Constraints**

- i. As is the case in other provinces in the region, difficulty of access is the major problem in Giresun. Sea transport can not be used. Giresun seaport is still under reconstruction. Vessels of large tonnage can not enter in the port.
- ii. Serious difficulties exist with access to townships and villages in the south section of the province.
- iii. A serious lack of infrastructure exists in urban and rural areas.
- iv. The Black Sea State Divided Highway functions as a barrier before shore settlements. Difference between the road level and the settlement level will be a great problem in the future. Today, these areas can not be used and are filled with garbage.
- v. Fishing loses strength.
- vi. Significant shortages exist with infrastructure. Sewerage and waste water treatment, solid waste collection and storage are especially important issues, but no facilities exist for those systems.
- vii. An obscurity of ownership exists in plateaus. Even the responsible authority for reference for purposes of development and investment is not known.
- viii. In some plateaus, development plans and investments have been already completed. However, a desirable development has not commenced yet.
- ix. The public and the Regional people do not know about certain natural assets. Publicity is necessary.

### C. Expectations & Demands

- i. Ease of access to the province of Giresun will enhance tourism activities.
- ii. Townships and villages located in the south of the province must be easily accessible.
- iii. Permission should be given to the use of forest estates for tourism development. This will prevent concrete development.
- iv. Wooden plateau houses and bungalows can solve accommodation problems in plateau settlements.
- v. Tourism development in plateaus can be urged by showing good examples to the public. For example, the public sector erected plateau facilities in Koçkaya. This must be a good example.
- vi. In the province of Giresun, there are clusters of plateaus which can be opened to tourism in the short term. For example, plateaus located on the route through Giresun-Bektaş (1 facility exists today) - Yavuz Kemal - Kümbet - (Koçkayası plateau facilities exist, and connected to Giresun with a 56-km asphalt road) – Çıkrıkkapı – Çakrak – Yağlıdere - Espiye can be developed. This route can be included in tour programs. Historical and cultural potentials exist on the route.
- vii. Another developable route is between the plateaus Giresun – Erimez - Yavuz Kemal (Kulakkaya) - Bektaş.
- viii. Similarly, development programs must be prepared for plateaus Çamalan, Paşakonağı, Sarıalan and other similar plateaus.
- ix. The arrangement of the fortress of Giresun, repairs and site arrangement, panoramic terraces will add revival to tourism.
- x. The texture of the old city, i.e. Zeytinlik Quarter must be conserved and reclaimed for tourism.
- xi. The lighting of individual historical structures will be another attractiveness.
- xii. External financing is a must for tourism development. Supply of funds is compulsory for a wholistic intervention.
- xiii. The construction of a cable way between the Island of Giresun and the shore should be studied.
- xiv. All entities must mobilize for tourism development. The efforts of only local administrations will not suffice.
- xv. Boarding business should be encouraged.

#### Participants of Giresun Stakeholders Meeting held in November 4, 2003

	<b>Name</b>	<b>Instution</b>
1	Ali Haydar Öner	Giresun Governor
2	Hasan Karaibrahim	Director of Security
3	Bayram Yılmaz	Bulancağ District Governor
4	İbrahim Özefe	Görece District Governor
5	Şakir Erden	Eynesil District Governor
6	Mürsel Bostancı	Provincial Director of Culture and Tourism
7	Ali Hıdır	Provincial Director of Environment and Forest
8	Şenol Kara	Provincial Directorate of Social Services
9	Hasan Kuruçelik	Director of Forest Operation
10	Cahit Akdoğan	Provincial Directorate of Press and Public Relations
11	Nazan Aydoğan	Provincial Directorate of Associations
12	Ali Bayburtlu	Regional Director of Forest
13	Halil Görnez	Eynesil Municipality Mayor
14	Mahmut Tetik	Aydınlar Municipality Mayor
15	İsmail Göral	Çavuşlu Municipality
16	Ahmet Erilli	Alucra Municipality
17	Öner Eriş	Bulancağ Municipality Mayor
18	Kemal Emiroğlu	Çanakçı Municipality

19	İsmail Önal	Yavuz Kemal Municipality
20	Armağan Başar	Hotel Başar
21	Hamza Apaydın	Dereli Culture and Tourism Association
22	Zerrin Akbay	Directorate of Environment and Forest
23	Mustafa Atar	Atar AŞ
24	Hüseyin Özkaya	Veterinarian
25	Hürriyet Keçeli	Provincial Directorate of Agriculture
26	Abdul Kerim Akpınar	Giresun Municipality Deputy Mayor
27	Hakan Karahasanoğlu	Press
28	Mehmet Ali Duran	Press
29	Mustafa Demir	Press
30	Atakan Çıtlak	Press
31	Asaf Zeki Kitapçı	Tourism Association
32	Tolunay Kurtoğlu	Secretary of Tourism Association
33	Saliha Yayla	Press
34	Fırat Yazıcıoğlu	Press
35	Erol Ayar	Press

### **Gümüşhane Stakeholders Meeting**

Gümüşhane meeting was held with 24 participants. The issues raised and views presented are given below.

#### **A. Opportunities:**

- i. With its uplands and its position on the Trabzon-Erzurun state road, Gümüşhane can launch an attack in tourism.
- ii. Historical assets, 24 caves and forests can activate the tourism sector. For example, the Karacan Cave is visited by 5.000 tourists per year.
- iii. Zigana is one of the greatest opportunities.
- iv. Nearness to other provinces can support daytime activities.
- v. Contribution can be supplied from native people living outside Gümüşhane. Developments achieved in agriculture can also be achieved in tourism.
- vi. Newly developing organic agricultural products can be introduced and marketed as the Gümüşhane cuisine.

#### **B. Problems & Constraints**

- i. Relative underdevelopment of the province necessitates the emphasize of the agricultural sector. Tourism can develop only owing to the State support and can be the source of additional income. Entrepreneurship is developed in the province.
- ii. Presently, in-province transport is very difficult. Only 6% of the provincial roads is asphalt-paved.
- iii. The local people would welcome lodging business.
- iv. Gümüşhane could not have not been publicized yet. For example, Sarıçecek village rooms are not known in Turkey.
- v. Major infrastructure problems exist in urban and rural areas. Harşit stream has been polluted to a great extent.
- vi. Gümüşhane uplands are not being used by the Gümüşhane people themselves.

#### **C. Expectations & Demands**

- i. The State should assist in the publicity of the tourism assets in Gümüşhane'nin. The public does not even know that certain uplands are in Gümüşhane.

- ii. Opportunities must be created for tourists visiting the Sümela monastery to go to Gümüşhane on a daily tour.
- iii. Grandsons of those citizens who left Gümüşhane at the beginning of the twentieth century visit the province and cause dynamism. This type of tourism must be supported.
- iv. Wooden upland houses and bungalows can solve accommodation problems. Permission should be given to the use of forest products for tourism building development.
- v. Tourism development entails a total mobilization. Such mobilization must be led by the public sector.
- vi. The boarding and lodging business should be encouraged. The local people will adopt it when they realize that it is a source of revenue.
- vii. Local foods, principally including “küme” (dried walnut pieces covered with treacle in the form of sausage) should be publicized and marketed. Woodcarving is another potential.

#### **Participants of Giresun Stakeholders Meeting held in November 11, 2003**

	<b>Name</b>	<b>Institutions</b>
1	Cafer Şahin	Director of Security
2	Mustafa Canli	Municipality Mayor
3	Süleyman Yılmaz	Şiran District Governor
4	Avni Oral	Kelkit District Governor
5	Abdurrahman Akdemir	Torul District Governor
6	Hüseyin Çakırtaş	Kürtün District Governor
7	Mehmet Makas	Köse District Governor
8	Dursun Ali Emir	Provincial Directorate of Culture and Tourism
9	Nurettin Taş	Provincial Directorate of Environment and Forest
10	Muhittin Yıldız	Provincial Directorate of Youth and Sports
11	İdris Altuntaş	Provincial Directorate of Social Services
12	Nazim Kul	Directorate of Meteorology
13	Çağlayan Turhan	Provincial Directorate of Local Authorities
14	Seyfettin Uysal	Provincial Directorate of Planning and Coordination
15	İlyas Ayvazoğlu	Ayvazoğlu Hotel
16	İsmail Akçay	Chamber of Commerce and Industry
17	Yıldırım Ürkmez	Chairmanship of Huntsman Association
18	Kyoko Terazono	JICA
19	Gökten Doğangün	JICA
20	Mustafa Duman	Provincial Directorate of Agriculture
21	Peyami Çiçek	Provincial Directorate of Agriculture
22	Sinan Müftüoğlu	Directorate of Industry and Commerce
23	Turan Tuğlu	Kuşakkaya Newspaper
24	Faruk Ata	Haber Türk

## Assessment of the Results of Partners Meetings on Regional Basis

A summary of the results of the meetings referred to above is provided below.

Restraints, Possibilities, Opportunities, Expectations and Threats Identified by Stakeholders declared at Regional Meetings

<b>Possibilities – Strong Aspects</b>	<b>Restraints</b>
<ul style="list-style-type: none"> <li>• Importance of the cultural and natural assets and the folkloric elements of the region are known to all partners.</li> <li>• The partners' knowledge and consciousness of the natural assets in particular is outstanding.</li> <li>• Although the cultural assets are also underlined, they are not as emphasized as the opportunities provided by the natural assets.</li> <li>• In each province, the partners know about the details of their own province and of the tourism resources in general and can identify which types of tourism they could activate, principally including the eco-tourism.</li> </ul>	<ul style="list-style-type: none"> <li>• At all meetings, the partners underlined the difficulties of transportation. According to the partners, the basic problem is the difficulty of access to the Region as well as poor in-Region connections.</li> <li>• According to the partners, not-yet-completed basic infrastructure is a bottleneck as important as the difficulty of transport</li> <li>• Similarly, the lack of urban amenities is also important. However, this restraint has not been emphasized by the partners as much as the first two problems.</li> <li>• The partners deem as an important restraint the weakness of the Regional economy and therefore the limited number of entrepreneurs.</li> </ul>
<b>Opportunities-Expectations</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• With reference to the Regional possibilities, the partners state that all types of culture and nature tourism could be developed in the Region. They are conscious in this respect. They provided definitions of numerous types of alternative tourism and emphasized the potential of small-scale congress and business tourism. However, the partners stated that such developments must be led by the public sector. On all issues, much is expected from the public sector.</li> <li>• The partners evaluated cooperation with the neighboring nations and the Batumi Airport as an opportunity and demanded public support for the use of it.</li> <li>• Although the possibility available to the Region for using the opportunities of the neighboring provinces was expressed, it was not emphasized.</li> <li>• The partners are anticipating investments by the East Black Sea people living outside the Region.</li> </ul>	<ul style="list-style-type: none"> <li>• That the partners expect all developments from the public sector should be considered an important problem.</li> <li>• The partners' views on organization and their opinion that it would be difficult to achieve is an important threat to the sector.</li> <li>• The partners share the opinion that, if no solution could be found, investments such as infrastructure and highway which disconnects the coast from cities would be a threat.</li> <li>• However, dams planned for Çoruh Basin have not been referred to much.</li> <li>• A failure to resolve the ownership issues are deemed by all partners as a threat to prevent investments.</li> </ul>

## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX C : RESULT OF TOURIST SURVEYS**

## A. TOURIST SURVEY MODEL

Dear Guests,

We, as Consultants of Study on "Eastern Black Sea Region Tourism Development Study" kindly ask to answer the following questions.

The purpose of the questionnaire is to give better services and to develop tourism activities in Black Sea Region according to our guests needs and expectations.

We are grateful for your interest.

We hope you enjoy your holiday in the Region.

Yours Faithfully,

Consultants of Study on "Eastern Black Sea Region Tourism Development Study"

---

Name of the interviewer:	
City:	
The place of interview:	
Date:	

---

### Questionnaire for Tourists

Nationality:.....

Occupation:.....

Education: .....

(High School, Occupational School, University)

Age:.....

Gender:

#### 1) Have you ever been to Turkey before?

Yes	
No	

#### 2) If your answer is 'yes', Which regions have you visited? How long have you stayed?

Name of the Region	Day

#### 3) After you had arrived in Turkey, how did you get to the Black Sea Region?

Air Transportation	Name of the airport:
Sea Transportation	Name of the Sea Terminal:
Highway	Border Gate or first town arrived in Black Sea Region:
The gate you made first entrance to Turkey ?	

**4) How did you decide to spend your holiday in Black Sea Region?  
Who had influenced your decision?**

Please mark (+)

Turkish Tourism Office in my Country	
Travel Agencies	
Advices of my friends who had visited the region before	
Brochures and Magazines	
Advices of the people who come from the region in my country	
I had visited before and like the region	
Other (Please state)	

**5) The reason for choosing the Black Sea Region to have your holiday:**

Please rank (1..5)

Natural Beatuies	
Cultural and Archeological Sites	
Climatic Conditions	
Other (Please State)	

**6) How long have you been staying and how long are you going to stay?**

Where?	How many days?
Trabzon	
Rize	
Gümüşhane	
Giresun	
Ordu	
Artvin	

**7) Have you stayed in any region before you come to Black Sea Region?**

Where	How many days?

**8) Are you going to continue your holiday in any other place after Black Sea Region?**

Where?	How many days?

**9) What is the cost of your holiday in Black sea region?**

..... (currency)



**10) What impressed you most in the Region?**

Please rank (1..5)

Mountains and high plateau	
Beaches and the sea	
Lakes and rivers	
Other natural beauties (please state)	
Archeological Assets	
Vernacular Artchitecture	
Old urban fabric characteristics/historical parts of settlements	
Cultural assets (music, traditions, hospitality)	
Etnographic characteristics ( food, handcrafts...etc.)	
Other (please state)	

**11) Please indicate your opinions regarding the following**

Please mark

	Good	Fair	Bad	<i>Other (Please state)</i>
Quality of accomodation and dinind facilities				
Quality of services (variety, respect, hygiene...etc)				
Tourist information services				
Infrastructure services (ways, water, communication, waste)				
Traffic and Parking				

**12) Please indicate the most important problems you noticed in Black Sea Region :**

Please rank (1..5)

Missings and the quality of the facilities	
Insufficient information	
Lack of recreation services	
Lack of cultural activities	
Lack of sport activities	
Lack of standardization in service prices	
Behaviors of the local people (please state)	
Others (please state)	

**13) If you were an executive in local administration of Black sea Region, what would you do first?**

Please rank (1..5)

Improvement in infrastructure	
More hygienic and clean Eastern Black sea	
Tidy common open places in the city	
To facilitate the town with information desks and signals	
Improve the pensions which do not ruin the vernacular architectural characteristics	
More controlled travel agency activities (including guidance)	
Order in transportation services	
Standardization in prices	
Others (please state)	

**14) In international market (or in the tourism market in your country) Do you think the promotion of Eastern Black Sea Region is enough? If not, what would you suggest?**


**15) Your First impressions on the Region as good and bad ? Please specify.**

Good Impression	Bad Impression

## PART I: SURVEY ANALYSIS

Table 1.1. Frequency Table of Survey by City

	City		
	Frequency	Percent	Cumulative Percent
ARTVIN	57	10,0	10,0
GIRESUN	30	5,2	15,2
GUMUSHANE	17	3,0	18,2
ORDU	30	5,2	23,4
RIZE	159	27,8	51,2
TRABZON	279	48,8	100,0
Total	572	100,0	

Table 1.2. Frequency Table of Survey by the Place of Interviewer

	The place of interviewer		
	Frequency	Percent	Cumulative Percent
AIRPORT	16	2,8	2,8
GIRESUN TOWER	6	1,0	3,8
HOTEL	41	7,2	11,0
OUTSIDE	485	84,8	95,8
PARK	14	2,4	98,3
RESTAURANT	10	1,7	100,0
Total	572	100,0	

## PART II: DEMOGRAPHIC ANALYSIS OF TOURISTS

Table 2.1. Frequency Table of Tourists by Nationality

Nationality			
	Frequency	Percent	Cumulative Percent
CANADA	1	,2	,2
CHINA	2	,3	,5
FRANCE	3	,5	1,0
GEORGIA	5	,9	1,9
GERMANY	67	11,7	13,6
GREECE	6	1,0	14,7
HOLLAND	2	,3	15,0
IRAN	2	,3	15,4
ISRAEL	95	16,6	32,0
JAPAN	13	2,3	34,3
OTHER COUNTRIES	39	6,8	41,1
ROMANIA	2	,3	41,4
RUSSIAN FED.	9	1,6	43,0
SAUDI ARABIA	2	,3	43,4
SPAIN	1	,2	43,5
<b>TURKISH</b>	<b>309</b>	<b>54,0</b>	<b>97,6</b>
U.S.A	4	,7	98,3
UKRANIA	2	,3	98,6
UNITED KINGDOM	8	1,4	100,0
Total	572	100,0	

Table 2.2. Cross Table of Education by Sex and Status

**Crosstabulation of Education by Sex and Status**

STATUS		EDUCATION		SEX		Total
				FEMALE	MALE	
TOURIST		EDUCATION	Count	4	2	6
			% of Total	1,6%	,8%	2,4%
	HIGH SCHOOL	Count	17	23	40	
		% of Total	6,7%	9,1%	15,8%	
	OCCUPATIONAL SCHOOL	Count	10	9	19	
		% of Total	4,0%	3,6%	7,5%	
	PRILIMINARY SCHOOL	Count		1	1	
		% of Total		,4%	,4%	
	UNIVERSITY	Count	76	111	187	
		% of Total	30,0%	43,9%	73,9%	
Total		Count	107	146	253	
		% of Total	42,3%	57,7%	100,0%	
TURKISH		EDUCATION	Count	2	1	3
			% of Total	,7%	,3%	1,0%
	HIGH SCHOOL	Count	34	36	70	
		% of Total	11,1%	11,8%	23,0%	
	OCCUPATIONAL SCHOOL	Count	7	12	19	
		% of Total	2,3%	3,9%	6,2%	
	PRILIMINARY SCHOOL	Count	7	7	14	
		% of Total	2,3%	2,3%	4,6%	
	UNIVERSITY	Count	67	132	199	
		% of Total	22,0%	43,3%	65,2%	
Total		Count	117	188	305	
		% of Total	38,4%	61,6%	100,0%	

Table 2.3. Descriptive Statistics for Age by each Status and Sex

STATUS TOURIST

			Count	Valid N	Mean	Median	Mode	Maximum	Minimum	Std Deviation
SEX	FEMALE	AGE	107	N=107	43	45	25	72	20	17
	MALE	AGE	146	N=146	41	35	25	71	20	16

STATUS TURKISH

			Count	Valid N	Mean	Median	Mode	Maximum	Minimum	Std Deviation
SEX	FEMALE	AGE	117	N=117	38	35	25	70	17	14
	MALE	AGE	188	N=187	39	35	35	70	16	13

## 2.4. Cross Table of Tourist by Sex and Status

**Crosstabulation of Status by Sex**

			SEX		Total
			FEMALE	MALE	
STATUS	TOURIST	Count	107	146	253
		% of Total	19,2%	26,2%	45,3%
	TURKISH	Count	117	188	305
		% of Total	21,0%	33,7%	54,7%
Total		Count	224	334	558
		% of Total	40,1%	59,9%	100,0%

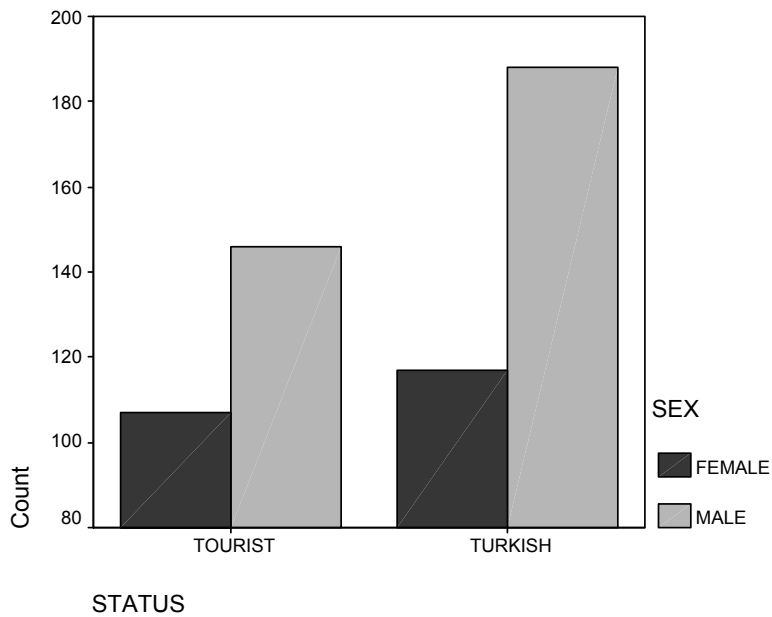


Figure 2.1. Histogram of Tourists by Sex and Status

## PART III: ANALYSIS OF SURVEY QUESTIONS

Q1. Have you ever been to Turkey before?

Table 3.1.1. Cross Table of Visitors by Status and Answers

**Case Processing Summary**

	Cases					
	Valid		Missing		Total	
	N	Percent	N	Percent	N	Percent
STATUS * Q1	316	55,2%	256	44,8%	572	100,0%

**Crosstabulation of Q1 by STATUS**

			Q1		Total
			NO	YES	
STATUS	TOURIST	Count	83	150	233
		% of Total	26,3%	47,5%	73,7%
	TURKISH	Count	31	52	83
		% of Total	9,8%	16,5%	26,3%
Total		Count	114	202	316
		% of Total	36,1%	63,9%	100,0%

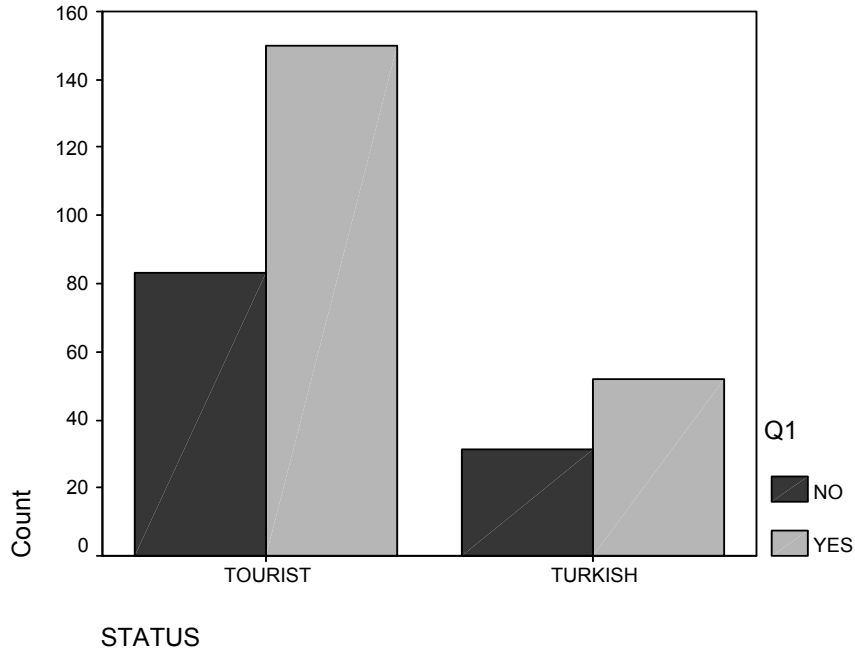


Figure 3.1.1. Histogram of Visitors to the Q.1 by Status

Q2. If your answer is 'yes', Which regions have you visited? How long have you stayed?

Table 3.2.1. Descriptive Statistics of Visitors for Duration and Region by Status

Q1 YES STATUS TOURIST								
	Count	Valid N	Mean	Median	Mode	Maximum	Minimum	Std Deviation
MARMARA	150	N=73	11	7	1	180	1	21
AEGEAN	150	N=52	8	7	1	28	1	7
BLACK SEA	150	N=38	11	7	1	45	1	12
MEDITERRANEAN	150	N=58	9	7	7	34	1	8
CENTRAL ANATOLIA	150	N=29	7	4	1	60	1	12
SOUTH EAST ANATOLIA	150	N=8	7	5	1	22	1	7
EAST ANATOLIA	150	N=11	4	1	1	13	1	4

Q1 YES STATUS TURKISH

	Count	Valid N	Mean	Median	Mode	Maximum	Minimum	Std Deviation
MARMARA	52	N=6	8	1	1	30	1	12
AEGEAN	52	N=9	15	1	1	96	1	31
BLACK SEA	52	N=8	8	7	1	20	1	8
MEDITERRANEAN	52	N=11	15	8	1	96	1	28
CENTRAL ANATOLIA	52	N=4	8	1	1	30	1	15
SOUTH EAST ANATOLIA	52	N=3	11	1	1	30	1	17
EAST ANATOLIA	52	N=3	17	1	1	50	1	28

Table 3.2.2. Count and Percentage of Visitors for Double Region

REGION	MARMARA	AEGEAN	BLACK SEA	MEDITERRANEAN	CENTRAL ANATOLIA	SOUTH EAST ANATOLIA	EAST ANATOLIA
MARMARA	79	38	19	39	21	8	11
AEGEAN		61	22	33	18	7	10
BLACK SEA			46	18	11	7	10
MEDITERRANEAN				69	17	6	9
CENTRAL ANATOLIA					33	9	7
SOUTH EAST ANATOLIA						11	8
EAST ANATOLIA							14

REGION	MARMARA	AEGEAN	BLACK SEA	MEDITERRANEAN	CENTRAL ANATOLIA	SOUTH EAST ANATOLIA	EAST ANATOLIA
MARMARA	100%	48%	24%	49%	27%	10%	14%
AEGEAN		100%	36%	54%	30%	11%	16%
BLACK SEA			100%	39%	24%	15%	22%
MEDITERRANEAN				100%	25%	9%	13%
CENTRAL ANATOLIA					100%	27%	21%
SOUTH EAST ANATOLIA						100%	73%
EAST ANATOLIA							100%

Q3. After you arrived in Turkey, how did you get to the Black Sea Region?

Table 3.3.1 Count and Percentage of Air Transportation by Airport

Case Processing Summary

	Cases					
	Valid		Missing		Total	
	N	Percent	N	Percent	N	Percent
AIR TRANSPORTATION * STATUS	178	31,1%	394	68,9%	572	100,0%

Crosstabulation of Air Transportation by Status

		STATUS		Total
		TOURIST	TURKISH	
ANKARA	Count	5	1	6
	% of Total	2,8%	,6%	3,4%
ANTALYA	Count	3		3
	% of Total	1,7%		1,7%
ERZURUM	Count	3	2	5
	% of Total	1,7%	1,1%	2,8%
ISTANBUL	Count	35		35
	% of Total	19,7%		19,7%
NEVSEHIR	Count	1		1
	% of Total	,6%		,6%
SAMSUN	Count	7		7
	% of Total	3,9%		3,9%
TRABZON	Count	104	12	116
	% of Total	58,4%	6,7%	65,2%
VAN	Count	5		5
	% of Total	2,8%		2,8%
Total	Count	163	15	178
	% of Total	91,6%	8,4%	100,0%



Table 3.3.2 Count and Percentage of Highway by City

**Crosstabulation of Highway by Status**

		STATUS		Total
		TOURIST	TURKISH	
ARTVIN	Count	2		2
	% of Total	2,2%		2,2%
ASYA TUR	Count		2	2
	% of Total		2,2%	2,2%
EDIRNE	Count	3		3
	% of Total	3,3%		3,3%
ERZURUM	Count	1	1	2
	% of Total	1,1%	1,1%	2,2%
GIRE SUN	Count		8	8
	% of Total		8,8%	8,8%
HOPA	Count	2		2
	% of Total	2,2%		2,2%
IPSALA	Count	1		1
	% of Total	1,1%		1,1%
ISPARTA	Count	1		1
	% of Total	1,1%		1,1%
ISTANBUL	Count	13	1	14
	% of Total	14,3%	1,1%	15,4%
KASTAMON	Count		1	1
	% of Total		1,1%	1,1%
ORDU	Count	1	7	8
	% of Total	1,1%	7,7%	8,8%
POSOF	Count	1		1
	% of Total	1,1%		1,1%
RIZE	Count	1		1
	% of Total	1,1%		1,1%
SAMSUN	Count	6	10	16
	% of Total	6,6%	11,0%	17,6%
SARP	Count	4		4
	% of Total	4,4%		4,4%
SINOP	Count	1		1
	% of Total	1,1%		1,1%
TRABZON	Count	14	8	22
	% of Total	15,4%	8,8%	24,2%
TRAKYA	Count	1		1
	% of Total	1,1%		1,1%
YUNANIST	Count	1		1
	% of Total	1,1%		1,1%
Total	Count	53	38	91
	% of Total	58,2%	41,8%	100,0%

Table 3.3.3 Count and Percentage of Sea Transportation by the Sea Terminal

**Case Processing Summary**

	Cases					
	Valid		Missing		Total	
	N	Percent	N	Percent	N	Percent
SEA TRANSPORTATION * STATUS	8	1,4%	564	98,6%	572	100,0%

**Crosstabulation of Sea Transportation by Status**

		STATUS	
		TOURIST	Total
ARTVIN	Count	2	2
	% of Total	25,0%	25,0%
ERZURUM	Count	3	3
	% of Total	37,5%	37,5%
TRABZON	Count	3	3
	% of Total	37,5%	37,5%
Total	Count	8	8
	% of Total	100,0%	100,0%

Table 3.3.4. Overall Count and Percentage of Transportation by Status

	TOURIST	TURKISH	TOTAL
<b>AIR TRANSPORTATION</b>	163	15	178
<b>HIGHWAY</b>	53	38	91
<b>SEA TRANSPORTATION</b>	8	0	8
<b>TOTAL</b>	224	53	277

	TOURIST	TURKISH	TOTAL
AIR TRANSPORTATION	59%	5%	64%
HIGHWAY	19%	14%	33%
SEA TRANSPORTATION	3%	0%	3%
TOTAL	81%	19%	100%

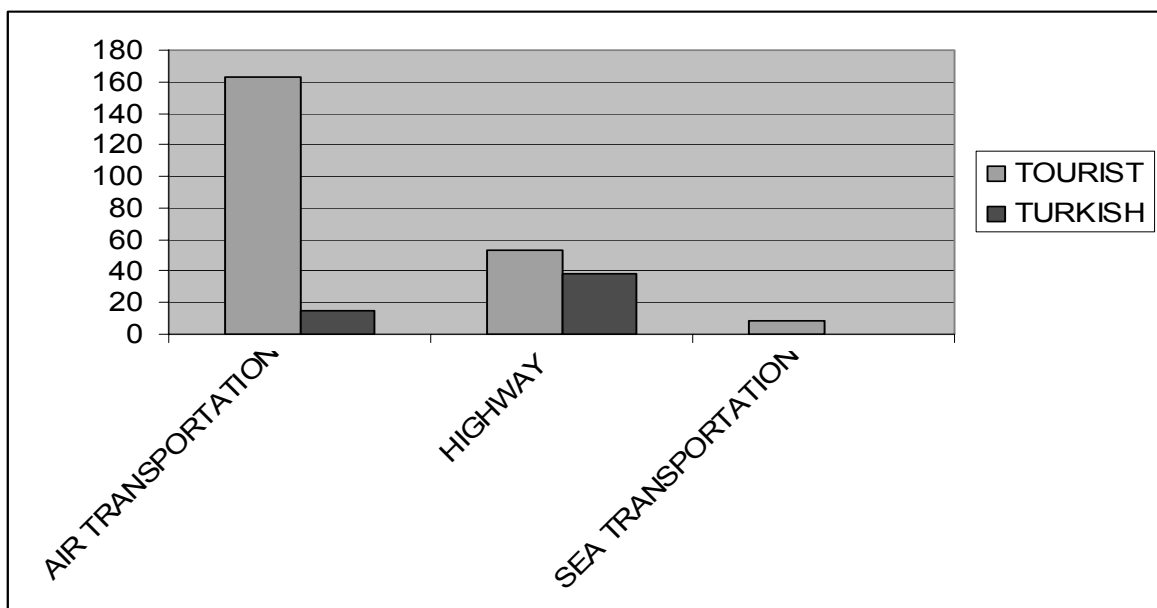


Figure 3.3.1. Transportation Way of the Visitors to the Region

Q4. How did you decide to spend your holiday in Black Sea Region? Who had influenced your decision?

Table 3.4.1. Count of Reason influenced Visitors Decision (Within each cell first number is count for whole Visitors, second for Tourists, third for Turkish)

	Turkish Tourism Office in my Country	Travel Agencies	Advices of my friends who had visited the region before	Brochures and Magazines	Advices of the people who come from the region in my country	I had visited before and like the region	Other
Turkish Tourism Office in my Country	48 36 12	21 15 6	36 30 6	20 17 3	9 6 3	6 4 2	2 2 0
Travel Agencies		107 69 38	50 27 23	55 37 18	15 8 7	16 9 7	8 3 5
Advices of my friends who had visited the region before			298 146 152	101 60 41	67 29 38	39 13 26	18 10 8
Brochures and Magazines				174 107 67	33 17 16	29 12 17	10 4 6
Advices of the people who come from the region in my country					99 39 60	25 6 19	5 3 2
I had visited before and like the region						122 37 85	10 4 6
Other							76 38 38

Table 3.4.2. Percentage of Reason influenced Visitors Decision (Within each cell first number is percentage for whole Visitors, second for Tourists, third for Turkish)

		Turkish Tourism Office in my Country	Travel Agencies	Advices of my friends who had visited the region before	Brochures and Magazines	Advices of the people who come from the region in my country	I had visited before and like the region	Other
Turkish Tourism Office in my Country	Total	100%	44%	75%	42%	19%	13%	4%
	Tourist	100%	31%	63%	35%	13%	8%	4%
	Turkish	100%	50%	50%	25%	25%	17%	0%
Travel Agencies	Total		100%	47%	51%	14%	15%	7%
	Tourist		100%	39%	54%	12%	13%	4%
	Turkish		100%	61%	47%	18%	18%	13%
Advices of my friends who had visited the region before	Total			100%	34%	22%	13%	6%
	Tourist			100%	41%	20%	9%	7%
	Turkish			100%	27%	25%	17%	5%
Brochures and Magazines	Total				100%	19%	17%	6%
	Tourist				100%	16%	11%	4%
	Turkish				100%	24%	25%	9%
Advices of the people who come from the region in my country	Total					100%	25%	5%
	Tourist					100%	15%	8%
	Turkish					100%	32%	3%
I had visited before and like the region	Total						100%	8%
	Tourist						100%	11%
	Turkish						100%	7%
Other	Total							100%
	Tourist							50%
	Turkish							50%

Q5. The reason for choosing the Black Sea Region to have your holiday: Please rank.

Table 3.5.1. Descriptive Statistics for Reasons to select Black Sea Region by Status

STATUS TOURIST

	Count	Valid N	Mean	Median	Mode	Std Deviation
Natural Beauties	263	N=243	5	5	5	1
Cultural and Archeological Sites	263	N=221	4	4	5	1
Climatic Conditions	263	N=188	3	3	3	1
Other	263	N=36	4	5	5	2

STATUS TURKISH

	Count	Valid N	Mean	Median	Mode	Std Deviation
Natural Beauties	309	N=281	5	5	5	1
Cultural and Archeological Sites	309	N=227	4	4	4	1
Climatic Conditions	309	N=228	3	3	3	1
Other	309	N=24	3	1	1	2

Table 3.5.2. Count and Percentage of Natural Beauties as a Reason by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	5	7	12
	% within STATUS	2,1%	2,5%	2,3%
2	Count	5	1	6
	% within STATUS	2,1%	,4%	1,1%
3	Count	17	2	19
	% within STATUS	7,0%	,7%	3,6%
4	Count	31	16	47
	% within STATUS	12,8%	5,7%	9,0%
5	Count	185	255	440
	% within STATUS	76,1%	90,7%	84,0%
Total	Count	243	281	524
	% within STATUS	100,0%	100,0%	100,0%

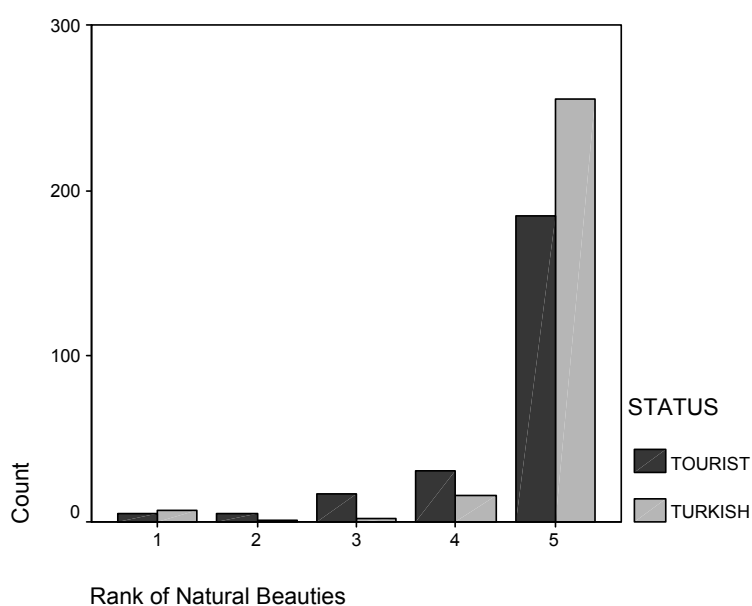
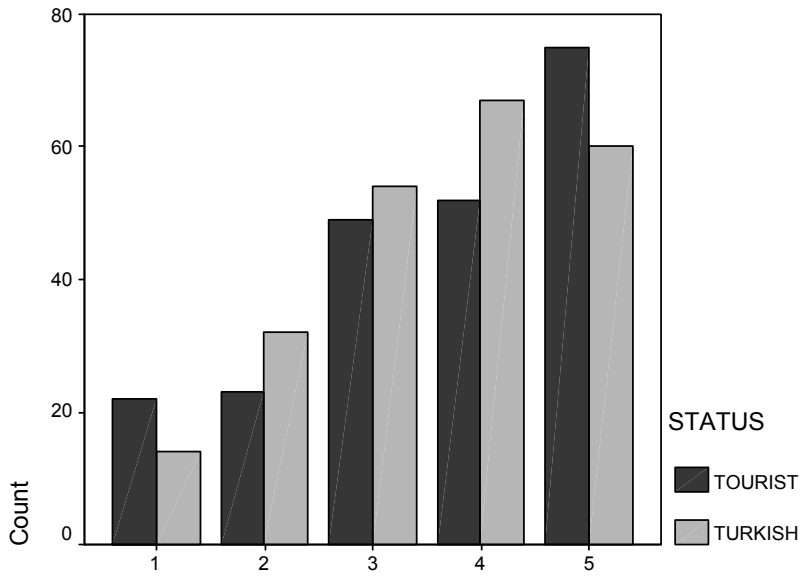


Figure 3.5.1. Histogram of Natural Beauties as a Reason by Status

Table 3.5.3. Count and Percentage of Cultural and Archeological Sites as a Reason by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	22	14	36
	% within STATUS	10,0%	6,2%	8,0%
2	Count	23	32	55
	% within STATUS	10,4%	14,1%	12,3%
3	Count	49	54	103
	% within STATUS	22,2%	23,8%	23,0%
4	Count	52	67	119
	% within STATUS	23,5%	29,5%	26,6%
5	Count	75	60	135
	% within STATUS	33,9%	26,4%	30,1%
Total	Count	221	227	448
	% within STATUS	100,0%	100,0%	100,0%

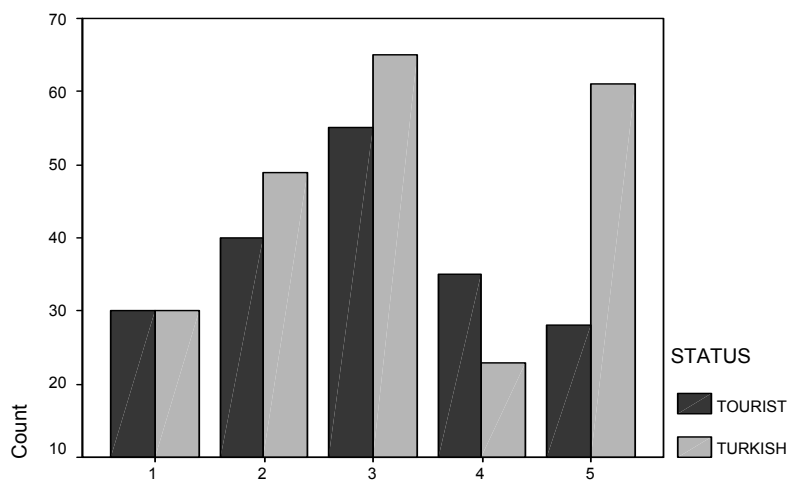


Rank of Cultural and Archeological Sites

Figure 3.5.2. Histogram of Cultural and Archeological Sites as a Reason by Status

Table 3.5.4. Count and Percentage of Climatic Conditions as a Reason by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	30	30	60
	% within STATUS	16,0%	13,2%	14,4%
2	Count	40	49	89
	% within STATUS	21,3%	21,5%	21,4%
3	Count	55	65	120
	% within STATUS	29,3%	28,5%	28,8%
4	Count	35	23	58
	% within STATUS	18,6%	10,1%	13,9%
5	Count	28	61	89
	% within STATUS	14,9%	26,8%	21,4%
Total	Count	188	228	416
	% within STATUS	100,0%	100,0%	100,0%



Climatic Conditions

Figure 3.5.3. Histogram of Climatic Conditions as a Reason by Status

Table 3.5.5. Count and Percentage of Other as a Reason by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	10	13	23
	% within STATUS	27,8%	54,2%	38,3%
2	Count		1	1
	% within STATUS		4,2%	1,7%
3	Count	2	1	3
	% within STATUS	5,6%	4,2%	5,0%
4	Count	5		5
	% within STATUS	13,9%		8,3%
5	Count	19	9	28
	% within STATUS	52,8%	37,5%	46,7%
Total	Count	36	24	60
	% within STATUS	100,0%	100,0%	100,0%

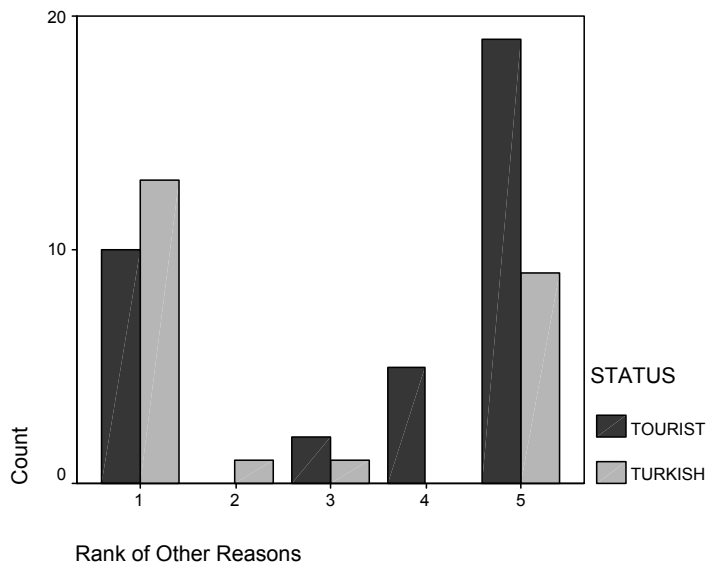


Figure 3.5.4. Histogram of Other as a Reason by Status

Q6. How long have you been staying and how long are you going to stay?

Table 3.6.1. Descriptive Statistics for Location and Duration in Black Sea Region by Status

STATUS	TOURIST	TURKISH	Count	Valid N	Mean	Median	Mode	Std Deviation
TOURIST	Trabzon		263	N=220	3	2	1	3
	Rize		263	N=70	2	2	1	2
	Gümüşhane		263	N=20	3	1	1	3
	Giresun		263	N=26	4	2	1	4
	Ordu		263	N=28	3	2	1	2
	Artvin		263	N=76	2	1	1	2
TURKISH	Trabzon		309	N=221	4	3	1	5
	Rize		309	N=153	4	2	2	8
	Gümüşhane		309	N=51	3	1	1	7
	Giresun		309	N=108	3	1	1	6
	Ordu		309	N=90	2	1	1	2
	Artvin		309	N=60	3	2	1	8

	Count	Valid N	Mean	Median	Mode	Std Deviation
<b>Trabzon</b>	572	N=441	<b>3,71</b>	2,00	1,00	3,99
<b>Rize</b>	572	N=223	<b>3,64</b>	2,00	1,00	7,19
<b>Gümüşhane</b>	572	N=71	<b>2,87</b>	1,00	1,00	6,19
<b>Giresun</b>	572	N=134	<b>3,17</b>	1,00	1,00	6,07
<b>Ordu</b>	572	N=118	<b>2,30</b>	1,00	1,00	2,30
<b>Artvin</b>	572	N=136	<b>2,57</b>	2,00	1,00	5,26
<b>OVERALL</b>			<b>3,29</b>			

Q7. Have you stayed in any region before you come to Black Sea

Table 3.7.1. Descriptive Statistics for Location and Duration before Black Sea Region Visiting by Status

REGION	STATUS	First Visit		Second Visit			N
		Mean	Std. Deviation	N	Mean	Std. Deviation	
<b>MEDITERRANEAN</b>	TOURIST	14,50	10,66	4	13,00	5,72	4
	TURKISH	9,67	4,46	18	5,40	3,51	5
	Total	10,55	6,00	22	8,78	5,87	9
<b>EAST ANATOLIA</b>	TOURIST	1,67	0,52	6	2,60	2,51	5
	TURKISH	2,00	1,22	5	10,00	7,07	2
	Total	1,82	0,87	11	4,71	5,06	7
<b>AEGEAN</b>	TOURIST	7,75	4,22	16	5,80	1,79	5
	TURKISH	11,33	10,28	40	8,00	7,29	12
	Total	10,30	9,08	56	7,35	6,19	17
<b>SOUTH EAST ANATOLIA</b>	TOURIST	7,00	0,00	0	0,00	0,00	0
	TURKISH	7,00	0,00	1	7,00	0,00	2
	Total	7,00	0,00	1	7,00	0,00	2
<b>CENTRAL ANATOLIA</b>	TOURIST	4,00	2,50	9	4,10	3,31	10
	TURKISH	5,67	6,80	15	1,67	0,58	3
	Total	5,04	5,57	24	3,54	3,07	13
<b>BLACK SEA</b>	TOURIST	3,91	4,57	11	1,71	0,49	7
	TURKISH	24,96	79,80	28	6,00	3,61	3
	Total	19,03	67,99	39	3,00	2,71	10
<b>MARMARA</b>	TOURIST	3,14	3,46	65	6,25	2,99	4
	TURKISH	9,83	7,36	12	7,25	3,77	4
	Total	4,18	4,89	77	6,75	3,20	8
<b>OVERALL</b>	TOURIST	4,20	4,64	111	4,68	4,34	35
	TURKISH	12,99	39,44	119	6,74	5,42	31
	Total	8,71	28,71	230	5,62	4,94	66



Table 3.7.2. Descriptive Statistics for Location and Overall Duration before Black Sea Region Visiting by Status

REGION	STATUS	First	Visit	Second	Visit	OVERALL
		Mean	N	Mean	N	
MEDITERRANEAN	TOURIST	14,50	4	13,00	4	13,75
	TURKISH	9,67	18	5,40	5	8,74
EAST ANATOLIA	TOURIST	1,67	6	2,60	5	2,09
	TURKISH	2,00	5	10,00	2	4,29
AEGEAN	TOURIST	7,75	16	5,80	5	7,29
	TURKISH	11,33	40	8,00	12	10,56
SOUTH EAST ANATOLIA	TOURIST	7,00	1	7,00	2	7,00
	TURKISH	7,00	1	7,00	2	7,00
CENTRAL ANATOLIA	TOURIST	4,00	9	4,10	10	4,05
	TURKISH	5,67	15	1,67	3	5,00
BLACK SEA	TOURIST	3,91	11	1,71	7	3,05
	TURKISH	24,96	28	6,00	3	23,13
MARMARA	TOURIST	3,14	65	6,25	4	3,32
	TURKISH	9,8	12	7,25	4	9,19
OVERALL	TOURIST	4,2	111	4,68	35	4,32
	TURKISH	13,0	117	6,74	29	11,75

Q8. Are you going to continue your holiday in any other place after Black Sea Region?

Table 3.8.1. Descriptive Statistics for Location and Duration after Black Sea Region Visiting by Status

REGION	STATUS	First Visit			Second Visit			Third Visit			Fourth Visit		
		Mean	Std. Deviation	N	Mean	Std. Deviation	N	Mean	Std. Deviation	N	Mean	Std. Deviation	N
MEDITERRANEAN	TOURIST	6,70	4,14	10	5,00	1,41	4	2,00	0,00	1	2,50	0,71	2
	TURKISH	6,00	1,29	7	4,00	0,00	1	0,00	0,00	0	0,00	0,00	0
	Total	6,41	3,22	17	4,80	1,30	5	2,00	0,00	1	2,50	0,71	2
EAST ANATOLIA	TOURIST	5,19	5,43	43	2,70	2,70	23	2,71	2,13	14	2,00	0,45	11
	TURKISH	1,60	0,55	5	0,00	0,00	1	0,00	0,00	0	0,00	0,00	0
	Total	4,81	5,25	48	2,64	2,64	24	2,71	2,13	14	2,00	0,45	11
AEGEAN	TOURIST	7,50	5,00	4	1,00	1,00	4	7,00	0,00	2	0,00	0,00	0
	TURKISH	5,67	2,80	6	0,00	0,00	0	0,00	0,00	0	0,00	0,00	0
	Total	6,40	3,69	10	1,00	1,00	4	7,00	0,00	2	0,00	0,00	0
SOUTH EAST ANATOLIA	TOURIST	5,00	0,00	1	0,00	0,00	0	2,00	0,00	1	0,00	0,00	0
	TURKISH	7,00	0,00	1	0,00	0,00	0	0,00	0,00	0	0,00	0,00	0
	Total	6,00	1,41	2	0,00	0,00	0	2,00	0,00	1	0,00	0,00	0
CENTRAL ANATOLIA	TOURIST	4,70	2,08	23	2,07	2,07	8	4,00	0,00	1	0,00	0,00	0
	TURKISH	4,57	1,40	7	0,00	0,00	0	0,00	0,00	0	0,00	0,00	0
	Total	4,67	1,92	30	2,07	2,07	8	4,00	0,00	1	0,00	0,00	0
BLACK SEA	TOURIST	5,40	4,28	5	0,00	0,00	0	0,00	0,00	0	0,00	0,00	0
	TURKISH	3,22	3,15	9	1,00	0,00	2	0,00	0,00	0	0,00	0,00	0
	Total	4,00	3,59	14	0,00	0,00	2	0,00	0,00	0	0,00	0,00	0
MARMARA	TOURIST	2,93	1,73	14	6,27	5,31	15	4,25	0,96	4	0,00	0,96	0
	TURKISH	3,56	1,94	9	0,00	0,00	0	2,00	0,00	1	0,00	0,00	0
	Total	3,17	1,80	23	6,27	5,31	15	3,80	1,30	5	0,00	0,00	0
OVERALL	TOURIST	5,86	5,31	100	4,35	3,65	54	3,35	2,14	23	2,08	0,49	13
	TURKISH	4,13	2,46	44	2,00	1,41	4	2,00	0,00	1	0,00	0,00	0
	Total	5,35	4,71	144	4,19	3,58	58	3,29	2,12	24	2,08	0,49	13

Table 3.8.2. Descriptive Statistics for Location and Overall Duration After Black Sea Region Visiting by Status

REGION	Statüs	First	Visit	Second	Visit	Third	Visit	Fourth	Visit	Overall
		Mean	N	Mean	N	Mean	N	Mean	N	Mean
MEDITERRANEAN	TOURIST	6,70	10	5,00	4	2,00	1	2,50	2	5,53
	TURKISH	6,00	7	4,00	1	2,00	1	0,00	0	5,33
EAST ANATOLIA	TOURIST	5,19	43	2,91	23	2,71	14	2,00	11	3,85
	TURKISH	1,60	5	2,00	1	2,71	14	0,00	0	2,40
AEGEAN	TOURIST	7,50	4	5,50	4	7,00	2	0,00	0	6,60
	TURKISH	5,67	6	5,50	4	7,00	2	0,00	0	5,84
SOUTH EAST ANATOLIA	TOURIST	5,00	1	0,00	0	2,00	1	0,00	0	3,50
	TURKISH	7,00	1	0,00	0	2,00	1	0,00	0	4,50
CENTRAL ANATOLIA	TOURIST	4,70	23	4,00	8	4,00	1	0,00	0	4,50
	TURKISH	4,57	7	4,00	8	4,00	1	0,00	0	4,25
BLACK SEA	TOURIST	5,40	5	1,00	2	0,00	0	0,00	0	4,14
	TURKISH	3,22	9	1,00	2	0,00	0	0,00	0	2,82
MARMARA	TOURIST	2,93	14	6,27	15	4,25	4	0,00	0	4,61
	TURKISH	3,56	9	6,27	15	2,00	1	0,00	0	5,12
OVERALL	TOURIST	5,86	99	4,35	54	3,35	23	2,80	13	4,91
	TURKISH	4,13	36	2,00	4	2,00	1	0,00	0	3,87

Q9. What is the cost of your holiday in Black Sea Region?

Table 3.9.1. Descriptive Statistics for the Cost of Holiday by Status and Currency

**Descriptive Statistics**

Dependent Variable: TUTAR

CURRENCY	STATUS	Mean	Std. Deviation	N
EURO	TOURIST	891,32	754,23	50
	TURKISH	470,00	67,08	5
	Total	853,02	729,02	55
STERLIN	TOURIST	1000,00	,	1
	TURKISH	1000,00	,	1
	Total	1000,00	,00	2
TL	TOURIST	649,67	507,57	30
	TURKISH	640,79	593,94	229
	Total	641,81	583,70	259
USD	TOURIST	601,74	1064,84	97
	TURKISH	580,00	508,18	5
	Total	600,68	1043,08	102
	TOURIST			178
	TURKISH			240
	Total			418

Table 3.9.2. Overall Cost of Holiday by Status

		Average Cost Of Holiday by T.L.
EURO	TOURIST	1.542.874.920 TL
	TURKISH	813.570.000 TL
	Total	1.476.574.473 TL
STERLIN	TOURIST	2.519.000.000 TL
	TURKISH	2.519.000.000 TL
	Total	2.519.000.000 TL
TL	TOURIST	650.000.000 TL
	TURKISH	641.000.000 TL
	Total	642.000.000 TL
USD	TOURIST	895.392.495 TL
	TURKISH	863.040.000 TL
	Total	893.806.588 TL
<b>Total</b>	<b>TOURIST</b>	<b>1.045.032.685 TL</b>
	<b>TURKISH</b>	<b>657.046.042 TL</b>
	<b>OVERALL</b>	<b>822.238.919 TL</b>

Daily Cost of Holiday in Black Sea Region = 822.238.919 T.L. / 3.29 Day

= 249.920.644 T.L.

Q10. What impressed you most in the Region?

Table 3.10.1. Descriptive Statistics for different impressed items by Status

	Count	Mean	Median	Mode	Std Deviation	Maximum	Minimum
Mountains and high plateau	572	5	5	5	1	5	1
Beaches and the sea	572	3	3	3	1	5	1
Lakes and rivers	572	4	4	5	1	5	1
Other natural beauties	572	4	5	5	1	5	1
Archeological Assets	572	3	3	3	1	5	1
Vernacular Architecture	572	3	3	3	1	5	1
Old urban fabric characteristics/historical parts of settlements	572	3	3	3	1	5	1
Cultural assets	572	4	4	5	1	5	1
Ethnographic characteristics	572	4	4	5	1	5	1
Other	572	4	5	5	2	5	1

STATUS TOURIST

	Count	Mean	Median	Mode	Std Deviation	Maximum	Minimum
Mountains and high plateau	263	5	5	5	1	5	1
Beaches and the sea	263	3	3	3	1	5	0
Lakes and rivers	263	4	4	5	1	5	1
Other natural beauties	263	4	5	5	1	5	1
Archeological Assets	263	3	3	5	1	5	1
Vernacular Architecture	263	3	3	3	1	5	1
Old urban fabric characteristics/historical parts of settlements	263	3	3	3	1	5	1
Cultural assets	263	4	4	5	1	5	1
Ethnographic characteristics	263	4	4	5	1	5	1
Other	263	4	4	5	2	5	1

STATUS TURKISH

	Count	Mean	Median	Mode	Std Deviation	Maximum	Minimum
Mountains and high plateau	309	5	5	5	1	5	1
Beaches and the sea	309	3	3	5	1	5	1
Lakes and rivers	309	4	4	5	1	5	1
Other natural beauties	309	4	4	5	1	5	1
Archeological Assets	309	3	3	3	1	5	1
Vernacular Architecture	309	3	3	3	1	5	1
Old urban fabric characteristics/historical parts of settlements	309	3	3	3	1	5	1
Cultural assets	309	4	4	5	1	5	1
Ethnographic characteristics	309	4	4	5	1	5	1
Other	309	4	5	5	1	5	1

Table 3.10.2. Count and Percentage for Mountains and High Plateau as a most impressed item by Status

**Mountains and High Plateau**

		STATUS		Total
		TOURIST	TURKISH	
1	Count	9	2	11
	% within STATUS	4,1%	,7%	2,2%
2	Count	2	2	4
	% within STATUS	,9%	,7%	,8%
3	Count	14	5	19
	% within STATUS	6,4%	1,8%	3,8%
4	Count	36	17	53
	% within STATUS	16,4%	6,0%	10,5%
5	Count	158	258	416
	% within STATUS	72,1%	90,8%	82,7%
Total	Count	219	284	503
	% within STATUS	100,0%	100,0%	100,0%

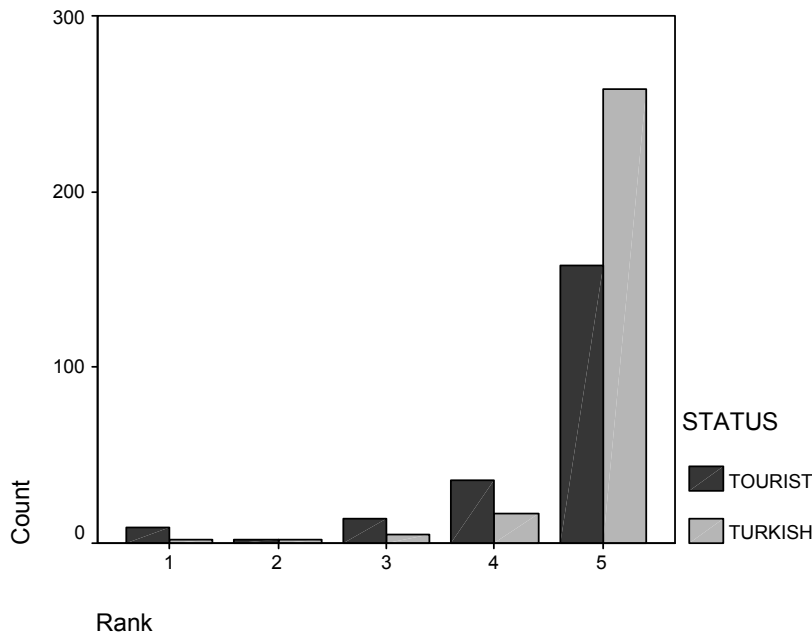


Figure 3.10.1 Histogram for Mountains and High Plateau as a most impressed item by Status

Table 3.10.3. Count and Percentage for Beaches and Sea as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	29	54	83
	% within STATUS	14,0%	22,5%	18,6%
2	Count	36	44	80
	% within STATUS	17,4%	18,3%	17,9%
3	Count	73	46	119
	% within STATUS	35,3%	19,2%	26,6%
4	Count	22	40	62
	% within STATUS	10,6%	16,7%	13,9%
5	Count	47	56	103
	% within STATUS	22,7%	23,3%	23,0%
Total	Count	207	240	447
	% within STATUS	100,0%	100,0%	100,0%

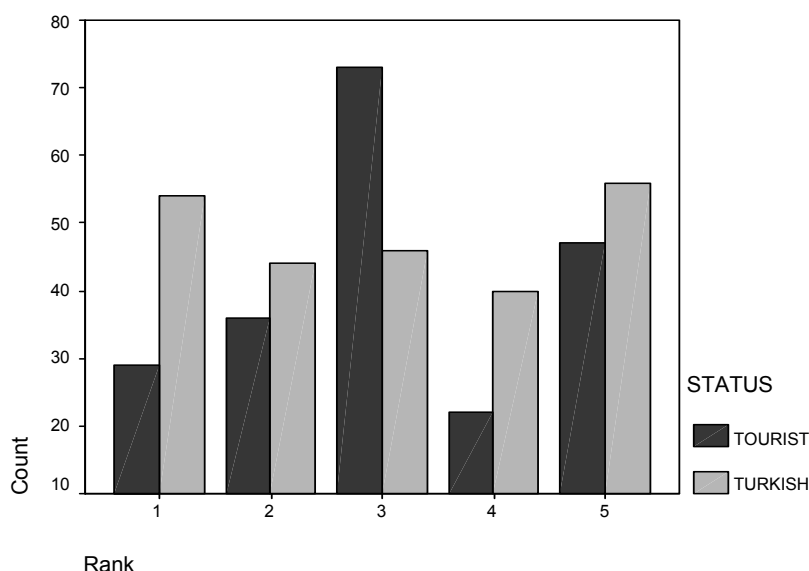


Figure 3.10.2. Histogram for Beaches and Sea as a most impressed item by Status

Table 3.10.4. Count and Percentage for Lakes and Rivers as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	16	5	21
	% within STATUS	7,2%	2,0%	4,4%
2	Count	17	23	40
	% within STATUS	7,7%	9,2%	8,5%
3	Count	24	40	64
	% within STATUS	10,8%	16,0%	13,6%
4	Count	70	71	141
	% within STATUS	31,5%	28,4%	29,9%
5	Count	95	111	206
	% within STATUS	42,8%	44,4%	43,6%
Total	Count	222	250	472
	% within STATUS	100,0%	100,0%	100,0%

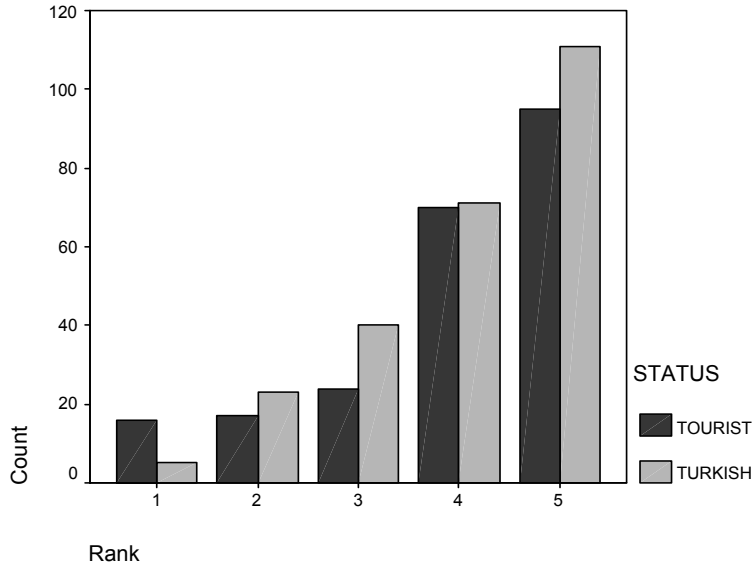


Figure 3.10.3. Histogram for Lakes and Rivers as a most impressed item by Status

Table 3.10.5. Count and Percentage for Other Natural Beauties as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	7	10	17
	% within STATUS	8,0%	11,1%	9,6%
2	Count	4	5	9
	% within STATUS	4,5%	5,6%	5,1%
3	Count	10	12	22
	% within STATUS	11,4%	13,3%	12,4%
4	Count	22	19	41
	% within STATUS	25,0%	21,1%	23,0%
5	Count	45	44	89
	% within STATUS	51,1%	48,9%	50,0%
Total	Count	88	90	178
	% within STATUS	100,0%	100,0%	100,0%

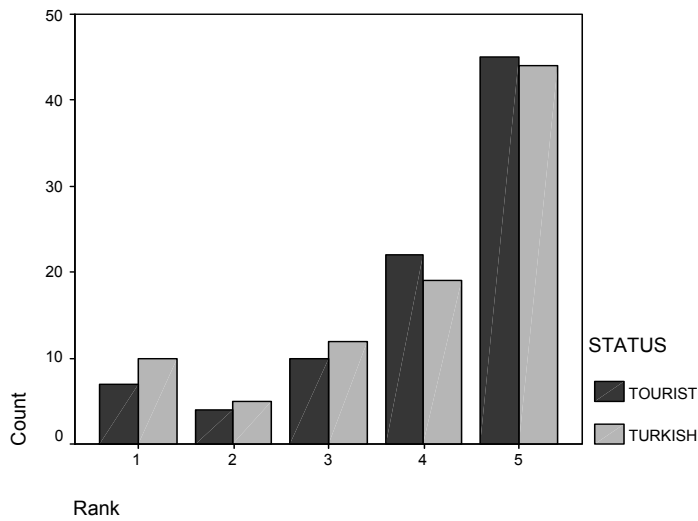


Figure 3.10.4. Histogram for Other Natural Beauties as a most impressed item by Status

Table 3.10.6. Count and Percentage for Archeological Assets as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	25	36	61
	% within STATUS	13,4%	15,9%	14,8%
2	Count	33	43	76
	% within STATUS	17,7%	18,9%	18,4%
3	Count	44	64	108
	% within STATUS	23,7%	28,2%	26,2%
4	Count	33	34	67
	% within STATUS	17,7%	15,0%	16,2%
5	Count	51	50	101
	% within STATUS	27,4%	22,0%	24,5%
Total	Count	186	227	413
	% within STATUS	100,0%	100,0%	100,0%

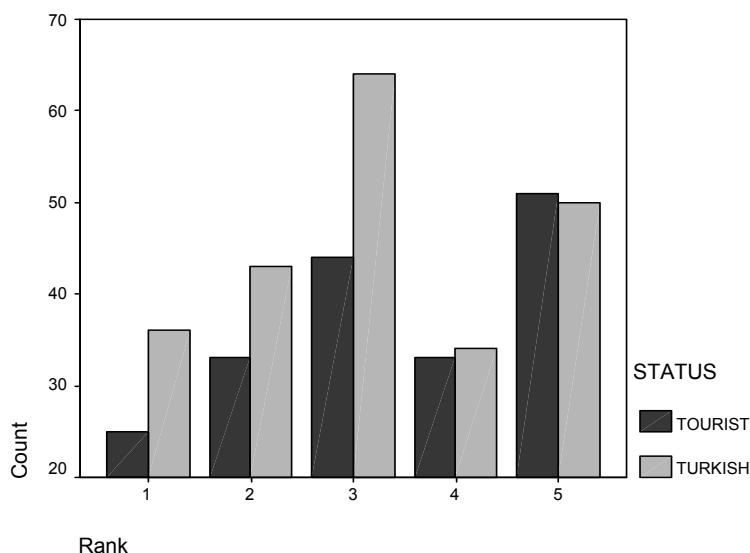


Figure 3.10.5. Histogram for Archeological Assets as a most impressed item by Status

Table 3.10.7. Count and Percentage for Vernacular Architecture as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	35	41	76
	% within STATUS	18,5%	20,1%	19,3%
2	Count	45	37	82
	% within STATUS	23,8%	18,1%	20,9%
3	Count	54	73	127
	% within STATUS	28,6%	35,8%	32,3%
4	Count	35	28	63
	% within STATUS	18,5%	13,7%	16,0%
5	Count	20	25	45
	% within STATUS	10,6%	12,3%	11,5%
Total	Count	189	204	393
	% within STATUS	100,0%	100,0%	100,0%

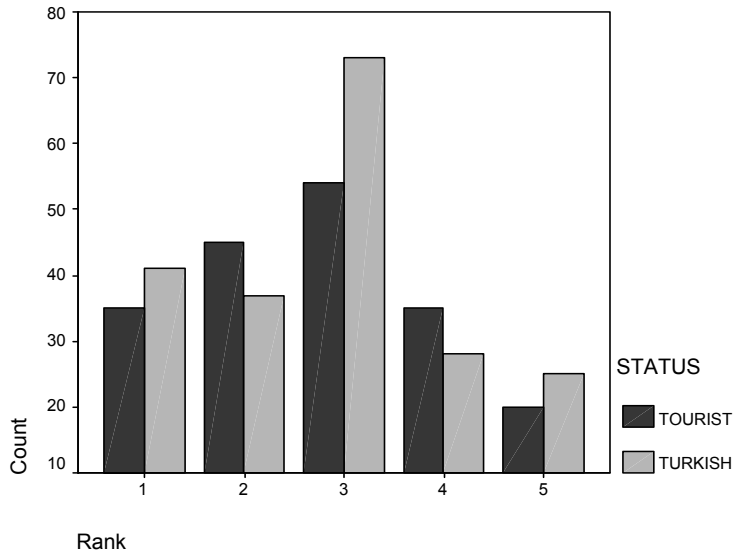


Figure 3.10.6. Histogram for Vernacular Architecture as a most impressed item by Status

Table 3.10.8. Count and Percentage for Old Urban Fabric Characteristics as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	27	28	55
	% within STATUS	14,2%	12,3%	13,2%
2	Count	44	48	92
	% within STATUS	23,2%	21,1%	22,0%
3	Count	59	59	118
	% within STATUS	31,1%	25,9%	28,2%
4	Count	31	41	72
	% within STATUS	16,3%	18,0%	17,2%
5	Count	29	52	81
	% within STATUS	15,3%	22,8%	19,4%
Total	Count	190	228	418
	% within STATUS	100,0%	100,0%	100,0%

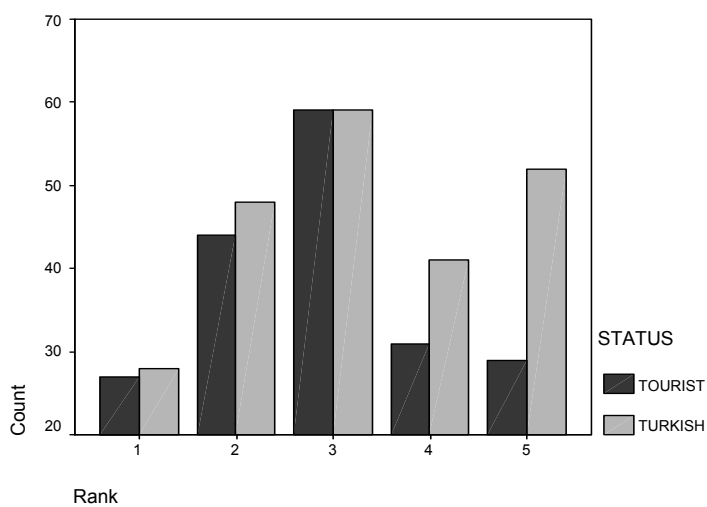


Figure 3.10.7. Histogram for Old Urban Fabric Characteristics as a most impressed item by Status



Table 3.10.9. Count and Percentage for Cultural Assets as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	16	8	24
	% within STATUS	7,8%	3,2%	5,3%
2	Count	21	14	35
	% within STATUS	10,2%	5,6%	7,7%
3	Count	48	35	83
	% within STATUS	23,4%	14,1%	18,3%
4	Count	56	74	130
	% within STATUS	27,3%	29,7%	28,6%
5	Count	64	118	182
	% within STATUS	31,2%	47,4%	40,1%
Total	Count	205	249	454
	% within STATUS	100,0%	100,0%	100,0%

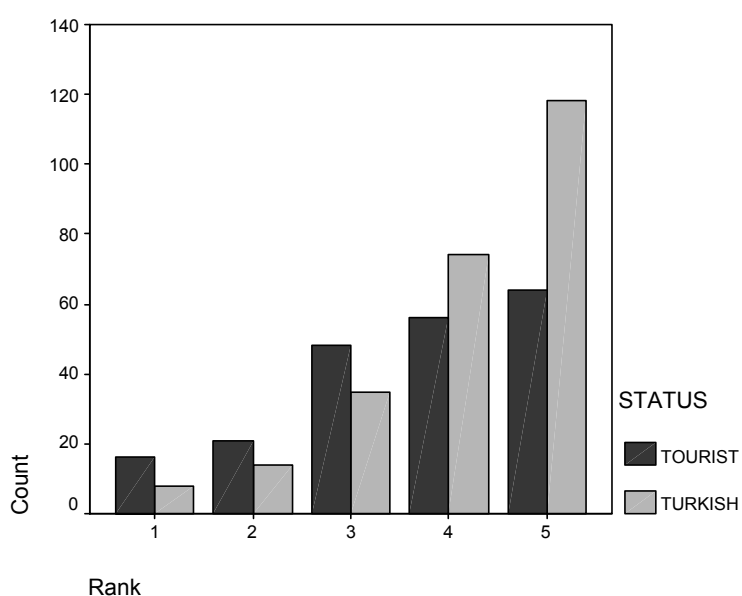


Figure 3.10.8. Histogram for Cultural Assets as a most impressed item by Status

Table 3.10.10. Count and Percentage for Ethnographic Characteristics as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	12	5	17
	% within STATUS	5,9%	2,1%	3,8%
2	Count	12	18	30
	% within STATUS	5,9%	7,5%	6,7%
3	Count	49	37	86
	% within STATUS	24,0%	15,4%	19,3%
4	Count	60	66	126
	% within STATUS	29,4%	27,4%	28,3%
5	Count	71	115	186
	% within STATUS	34,8%	47,7%	41,8%
Total	Count	204	241	445
	% within STATUS	100,0%	100,0%	100,0%

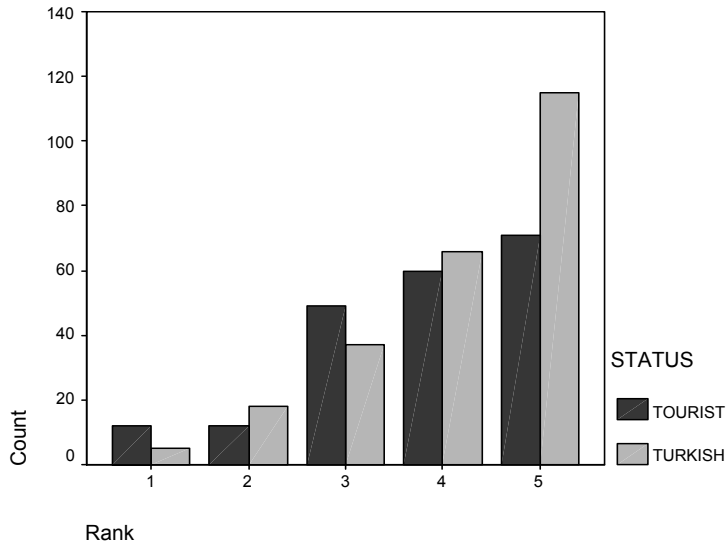


Figure 3.10.9. Histogram for Ethnographic Characteristics as a most impressed item by Status

Table 3.10.11. Count and Percentage for Other as a most impressed item by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	5	1	6
	% within STATUS	20,8%	10,0%	17,6%
3	Count	6	1	7
	% within STATUS	25,0%	10,0%	20,6%
4	Count	3		3
	% within STATUS	12,5%		8,8%
5	Count	10	8	18
	% within STATUS	41,7%	80,0%	52,9%
Total	Count	24	10	34
	% within STATUS	100,0%	100,0%	100,0%

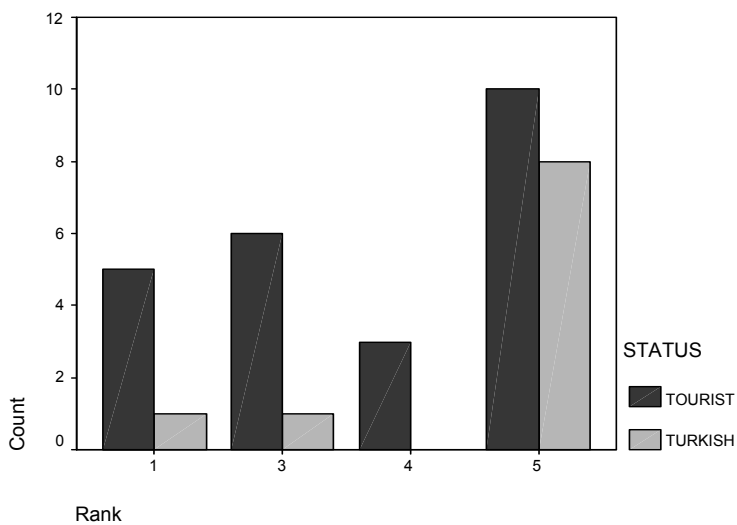


Figure 3.10.10. Histogram for Other as a most impressed item by Status

Q11. Please indicate your opinions regarding the following.

Table 3.11.1. Descriptive Statistics for Opinions regarding to some items by Status

	Count	Valid N	Mean	Median	Mode	Std Deviation
Quality of accommodation and dining facilities	572	N=501	2	1	1	1
Quality of services	572	N=513	2	1	1	1
Tourist information services	572	N=444	2	2	2	1
Infrastructure services	572	N=496	2	2	3	1
Traffic and Parking	572	N=462	2	2	2	1

STATUS TOURIST

	Count	Valid N	Mean	Median	Mode	Std Deviation
Quality of accommodation and dining facilities	263	N=221	2	1	1	1
Quality of services	263	N=240	2	1	1	1
Tourist information services	263	N=202	2	2	2	1
Infrastructure services	263	N=228	2	2	2	1
Traffic and Parking	263	N=207	2	2	2	1

STATUS TURKISH

	Count	Valid N	Mean	Median	Mode	Std Deviation
Quality of accommodation and dining facilities	309	N=280	2	2	1	1
Quality of services	309	N=273	2	2	1	1
Tourist information services	309	N=242	2	2	2	1
Infrastructure services	309	N=268	2	2	3	1
Traffic and Parking	309	N=255	2	2	3	1

Table 3.11.2. Descriptive Statistics for Quality of Accommodation and Dining Facilities by Status

Quality of accommodation and dining facilities

		STATUS		Total
		TOURIST	TURKISH	
Good	Count	119	140	259
	% within STATUS	53,8%	50,0%	51,7%
Fair	Count	90	125	215
	% within STATUS	40,7%	44,6%	42,9%
Bad	Count	12	14	26
	% within STATUS	5,4%	5,0%	5,2%
Other	Count		1	1
	% within STATUS		,4%	,2%
Total	Count	221	280	501
	% within STATUS	100,0%	100,0%	100,0%

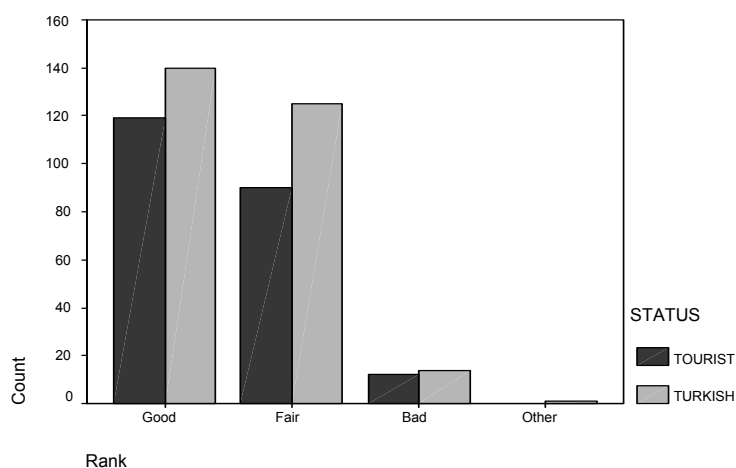
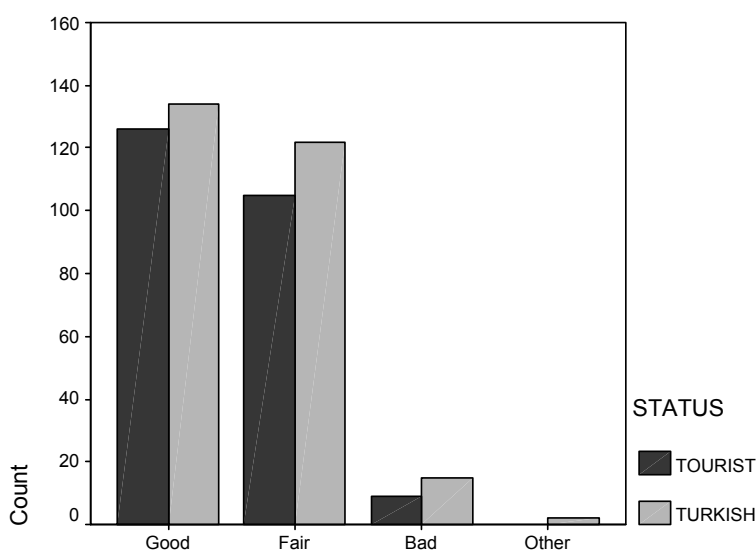


Figure 3.11.1. Histogram for Quality of Accommodation and Dining Facilities by Status

Table 3.11.3. Descriptive Statistics for Quality of Services by Status

		STATUS		Total
		TOURIST	TURKISH	
Good	Count	126	134	260
	% within STATUS	52,5%	49,1%	50,7%
Fair	Count	105	122	227
	% within STATUS	43,8%	44,7%	44,2%
Bad	Count	9	15	24
	% within STATUS	3,8%	5,5%	4,7%
Other	Count		2	2
	% within STATUS		,7%	,4%
Total	Count	240	273	513
	% within STATUS	100,0%	100,0%	100,0%



Rank

Figure 3.11.2. Histogram for Quality of Services by Status

Table 3.11.4. Descriptive Statistics for Tourist Information Services by Status

		STATUS		Total
		TOURIST	TURKISH	
Good	Count	50	43	93
	% within STATUS	24,8%	17,8%	20,9%
Fair	Count	76	90	166
	% within STATUS	37,6%	37,2%	37,4%
Bad	Count	58	90	148
	% within STATUS	28,7%	37,2%	33,3%
Other	Count	18	19	37
	% within STATUS	8,9%	7,9%	8,3%
Total	Count	202	242	444
	% within STATUS	100,0%	100,0%	100,0%

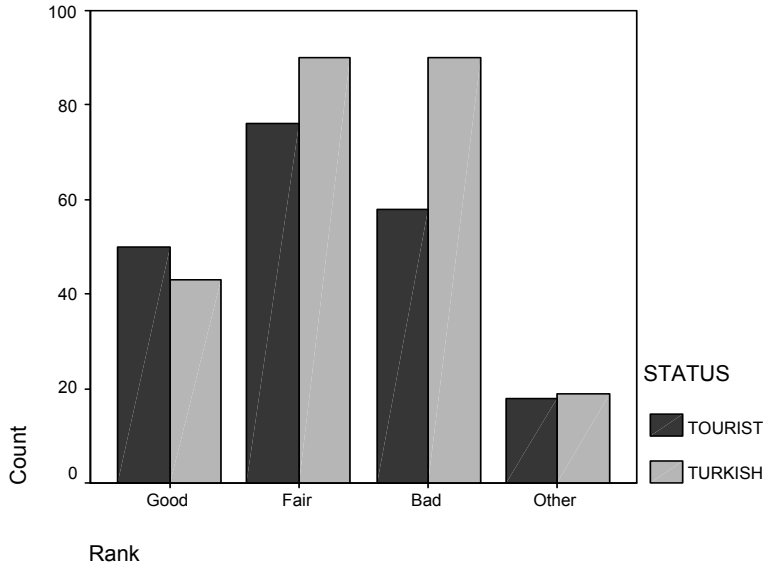


Figure 3.11.3. Histogram for Tourist Information Services by Status

Table 3.11.5. Descriptive Statistics for Infrastructure Services by Status

**Infrastructure services (Ways, water, communication, waste)**

		STATUS		Total
		TOURIST	TURKISH	
Good	Count	52	46	98
	% within STATUS	22,8%	17,2%	19,8%
Fair	Count	89	97	186
	% within STATUS	39,0%	36,2%	37,5%
Bad	Count	83	122	205
	% within STATUS	36,4%	45,5%	41,3%
Other	Count	4	3	7
	% within STATUS	1,8%	1,1%	1,4%
Total	Count	228	268	496
	% within STATUS	100,0%	100,0%	100,0%

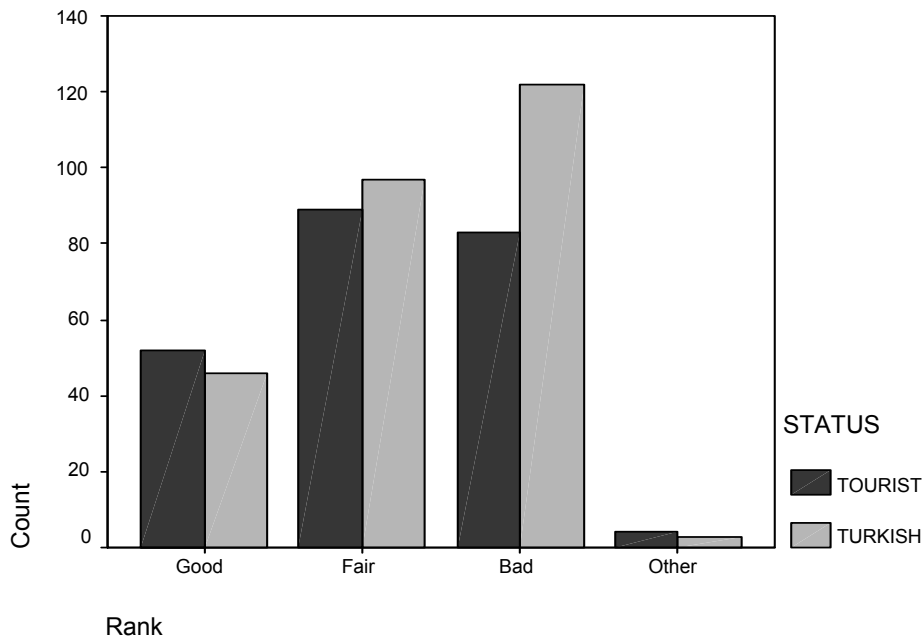


Figure 3.11.4. Histogram for Infrastructure Services by Status

Table 3.11.6. Descriptive Statistics for Traffic and Parking by Status

		STATUS		Total
		TOURIST	TURKISH	
Good	Count	47	45	92
	% within STATUS	22,7%	17,6%	19,9%
Fair	Count	94	91	185
	% within STATUS	45,4%	35,7%	40,0%
Bad	Count	62	116	178
	% within STATUS	30,0%	45,5%	38,5%
Other	Count	4	3	7
	% within STATUS	1,9%	1,2%	1,5%
Total	Count	207	255	462
	% within STATUS	100,0%	100,0%	100,0%

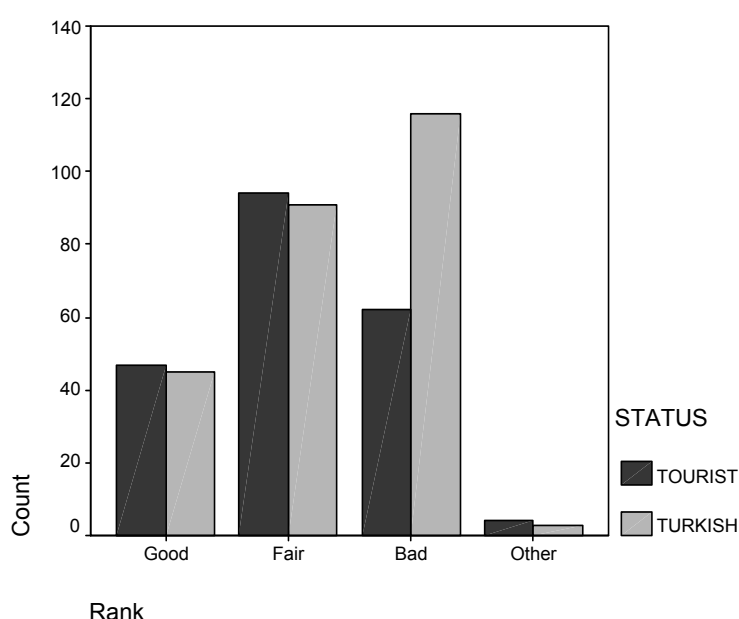


Figure 3.11.5. Histogram for Traffic and Parking by Status

Q12. Please indicate the most important problems you noticed in Black Sea Region?

Table 3.12.1. Descriptive Statistics of Rank for Most Important Problems by Status

	Count	Mean	Median	Mode	Std Deviation	Maximum	Minimum
Missing and the quality of the facilities	572	3	3	3	1	5	1
Insufficient information	572	3	3	4	1	5	1
Lack of recreation services	572	3	3	1	1	5	1
Lack of cultural activities	572	3	3	1	1	5	1
Lack of sport activities	572	3	3	1	2	5	1
Lack of standardization and changes in service prices	572	3	3	1	1	5	1
Behaviors of the local people	572	3	2	1	2	5	1
Others	572	2	1	1	2	5	1

STATUS TOURIST

	Count	Mean	Median	Mode	Std Deviation	Maximum	Minimum
Missing and the quality of the facilities	263	3	3	3	1	5	1
Insufficient information	263	3	3	4	1	5	1
Lack of recreation services	263	3	3	1	1	5	1
Lack of cultural activities	263	3	2	1	1	5	1
Lack of sport activities	263	3	2	1	2	5	1
Lack of standardization and changes in service prices	263	3	2	1	1	5	1
Behaviors of the local people	263	2	1	1	2	5	1
Others	263	2	1	1	2	5	1

STATUS TURKISH

	Count	Mean	Median	Mode	Std Deviation	Maximum	Minimum
Missing and the quality of the facilities	309	3	3	3	1	5	1
Insufficient information	309	3	3	3	1	5	1
Lack of recreation services	309	3	3	5	1	5	1
Lack of cultural activities	309	3	3	4	1	5	1
Lack of sport activities	309	3	3	5	2	5	1
Lack of standardization and changes in service prices	309	3	3	3	1	5	1
Behaviors of the local people	309	3	3	1	2	5	1
Others	309	3	1	1	2	5	1

Table 3.12.2. Count and Percentage of Rank for Missing and Quality of the Facilities by Status

Missing and the quality of the facilities

		STATUS		Total
		TOURIST	TURKISH	
1	Count	39	35	74
	% within STATUS	18,8%	13,8%	16,1%
2	Count	37	34	71
	% within STATUS	17,9%	13,4%	15,4%
3	Count	73	90	163
	% within STATUS	35,3%	35,4%	35,4%
4	Count	38	64	102
	% within STATUS	18,4%	25,2%	22,1%
5	Count	20	31	51
	% within STATUS	9,7%	12,2%	11,1%
Total	Count	207	254	461
	% within STATUS	100,0%	100,0%	100,0%

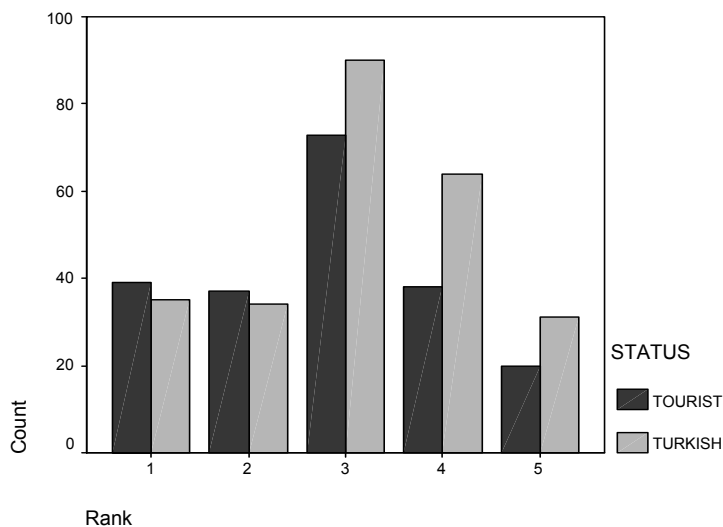


Figure 3.12.1. Histogram of Rank for Missing and Quality of the Facilities by Status

Table 3.12.3. Count and Percentage of Rank for Insufficient Information by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	44	52	96
	% within STATUS	20,4%	20,6%	20,5%
2	Count	23	34	57
	% within STATUS	10,6%	13,4%	12,2%
3	Count	46	73	119
	% within STATUS	21,3%	28,9%	25,4%
4	Count	62	58	120
	% within STATUS	28,7%	22,9%	25,6%
5	Count	41	36	77
	% within STATUS	19,0%	14,2%	16,4%
Total	Count	216	253	469
	% within STATUS	100,0%	100,0%	100,0%

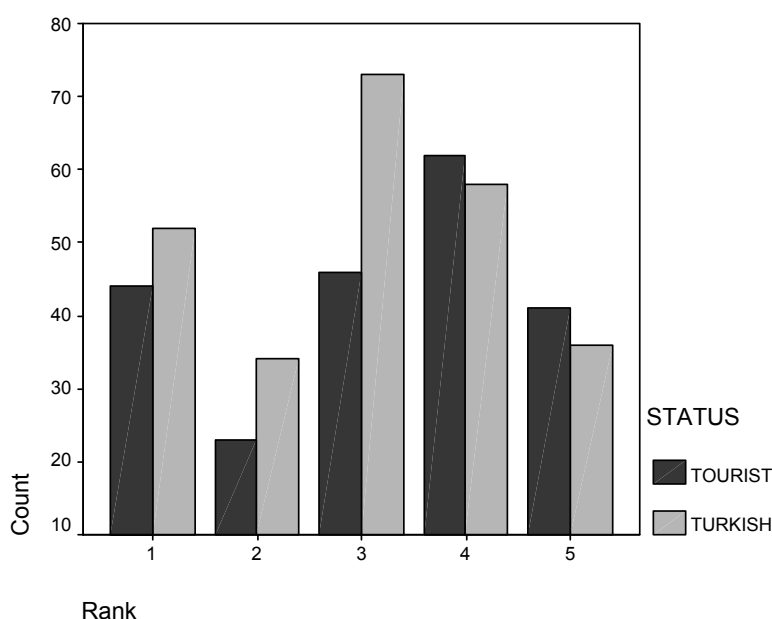


Figure 3.12.2. Histogram of Rank for Insufficient Information by Status

Table 3.12.4. Count and Percentage of Rank for Lack of Recreation Services by Status

			STATUS		Total
			TOURIST	TURKISH	
Q12.3 1	Count	52	57	109	
	% within STATUS	25,6%	22,4%	23,8%	
2	Count	31	25	56	
	% within STATUS	15,3%	9,8%	12,2%	
3	Count	39	57	96	
	% within STATUS	19,2%	22,4%	21,0%	
4	Count	41	56	97	
	% within STATUS	20,2%	22,0%	21,2%	
5	Count	40	60	100	
	% within STATUS	19,7%	23,5%	21,8%	
Total	Count	203	255	458	
	% within STATUS	100,0%	100,0%	100,0%	



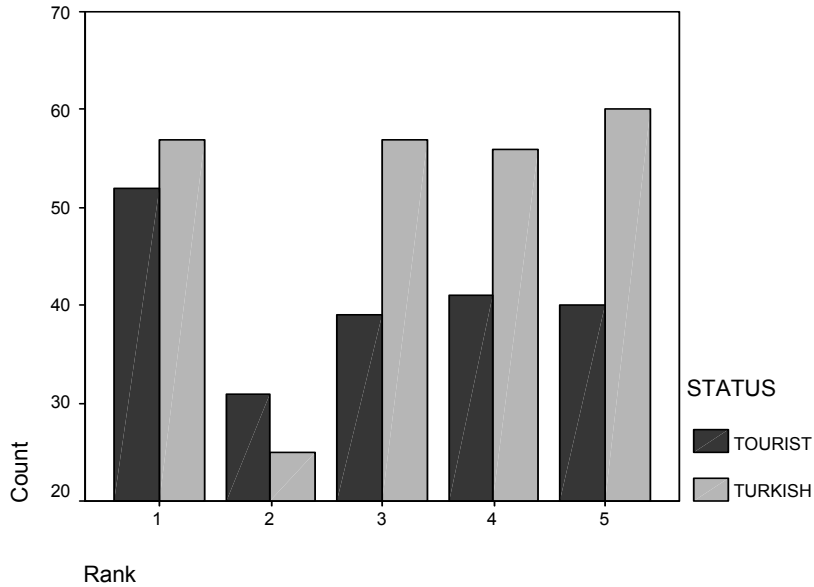


Figure 3.12.3. Histogram of Rank for Lack of Recreation Services by Status

Table 3.12.5. Count and Percentage of Rank for Lack of Cultural Activities by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	68	46	114
	% within STATUS	33,3%	18,5%	25,2%
2	Count	36	50	86
	% within STATUS	17,6%	20,1%	19,0%
3	Count	44	54	98
	% within STATUS	21,6%	21,7%	21,6%
4	Count	36	55	91
	% within STATUS	17,6%	22,1%	20,1%
5	Count	20	44	64
	% within STATUS	9,8%	17,7%	14,1%
Total	Count	204	249	453
	% within STATUS	100,0%	100,0%	100,0%

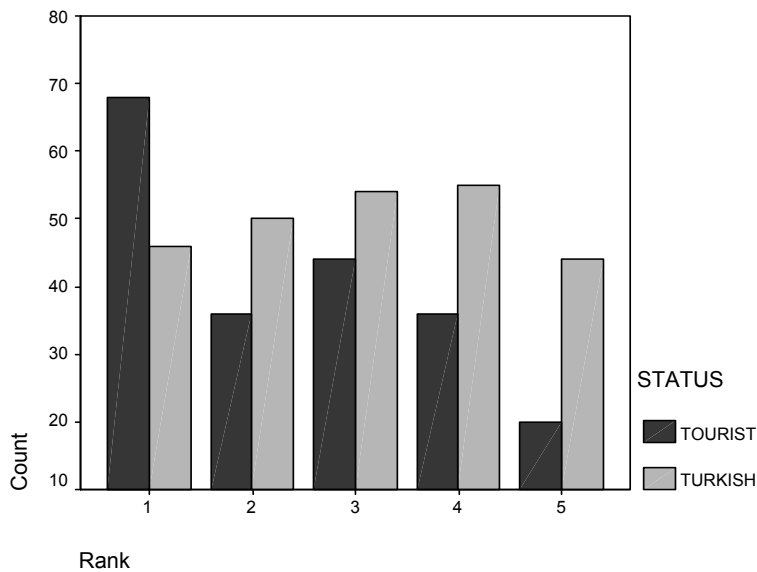


Figure 3.12.4. Histogram of Rank for Lack of Cultural Activities by Status

Table 3.12.6. Count and Percentage of Rank for Lack of Sport Activities by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	80	59	139
	% within STATUS	41,5%	25,7%	32,9%
2	Count	24	34	58
	% within STATUS	12,4%	14,8%	13,7%
3	Count	24	29	53
	% within STATUS	12,4%	12,6%	12,5%
4	Count	26	44	70
	% within STATUS	13,5%	19,1%	16,5%
5	Count	39	64	103
	% within STATUS	20,2%	27,8%	24,3%
Total	Count	193	230	423
	% within STATUS	100,0%	100,0%	100,0%

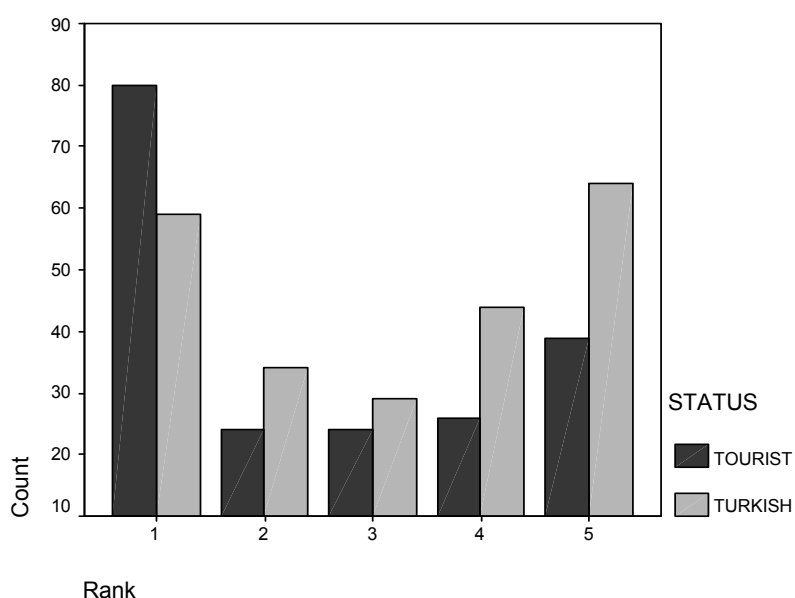


Figure 3.12.5. Histogram of Rank for Lack of Sport Activities by Status

Table 3.12.7. Count and Percentage of Rank for Lack of Standardization and Changes in Service Prices by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	57	49	106
	% within STATUS	27,8%	20,7%	24,0%
2	Count	46	46	92
	% within STATUS	22,4%	19,4%	20,8%
3	Count	43	58	101
	% within STATUS	21,0%	24,5%	22,9%
4	Count	35	42	77
	% within STATUS	17,1%	17,7%	17,4%
5	Count	24	42	66
	% within STATUS	11,7%	17,7%	14,9%
Total	Count	205	237	442
	% within STATUS	100,0%	100,0%	100,0%

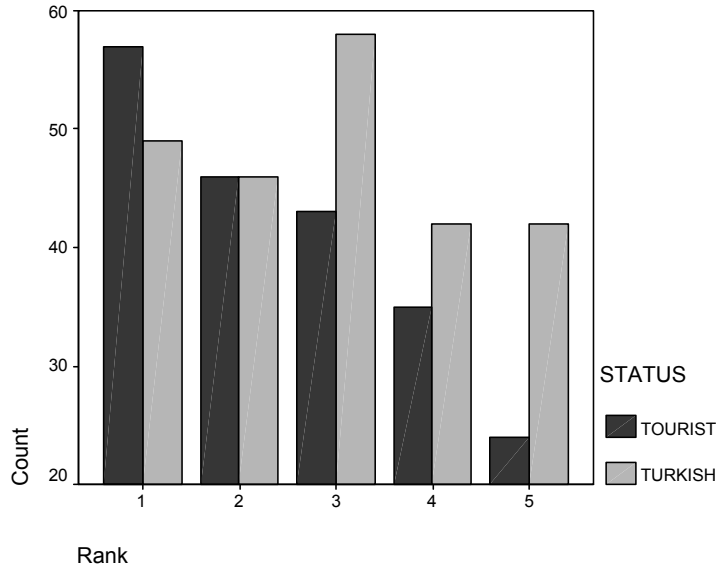


Figure 3.12.6. Histogram of Rank for Lack of Standardization and Changes in Service Prices by Status

Table 3.12.8. Count and Percentage of Rank for Behaviors of the Local People by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	113	92	205
	% within STATUS	55,4%	38,2%	46,1%
2	Count	23	24	47
	% within STATUS	11,3%	10,0%	10,6%
3	Count	18	12	30
	% within STATUS	8,8%	5,0%	6,7%
4	Count	14	30	44
	% within STATUS	6,9%	12,4%	9,9%
5	Count	36	83	119
	% within STATUS	17,6%	34,4%	26,7%
Total	Count	204	241	445
	% within STATUS	100,0%	100,0%	100,0%

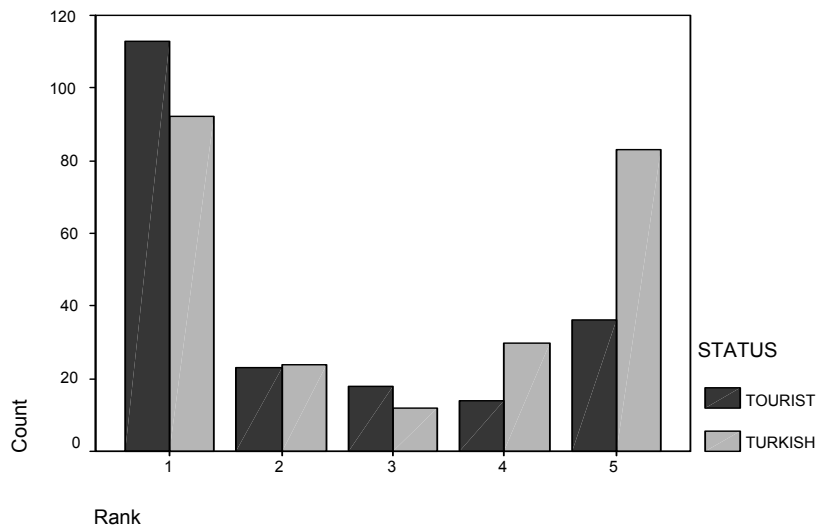


Figure 3.12.7. Histogram of Rank for Behaviors of the Local People by Status

Table 3.12.9. Count and Percentage of Rank for Others by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	13	9	22
	% within STATUS	54,2%	52,9%	53,7%
2	Count	2	1	3
	% within STATUS	8,3%	5,9%	7,3%
3	Count	2	1	3
	% within STATUS	8,3%	5,9%	7,3%
4	Count	2	1	3
	% within STATUS	8,3%	5,9%	7,3%
5	Count	5	5	10
	% within STATUS	20,8%	29,4%	24,4%
Total	Count	24	17	41
	% within STATUS	100,0%	100,0%	100,0%

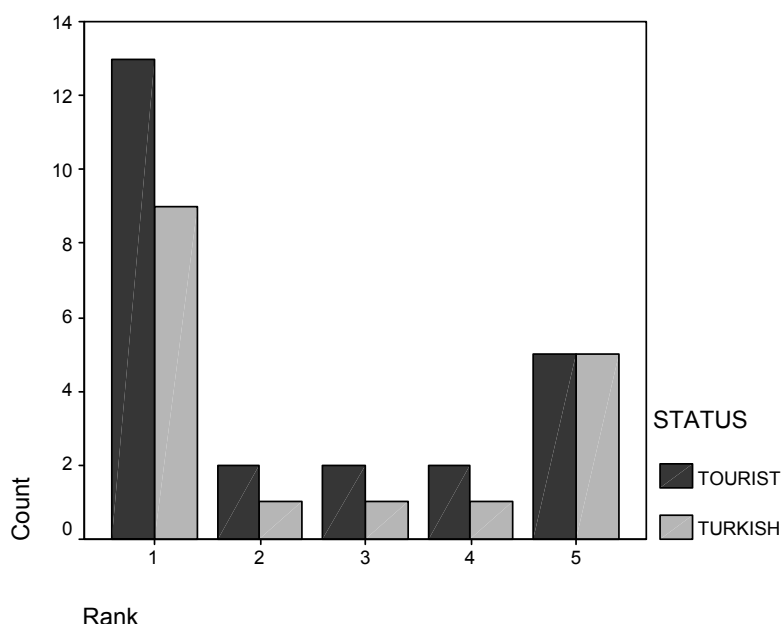


Figure 3.12.8. Histogram of Rank for Others by Status

Q13. If you were an executive in local administration of Black Sea Region, what would you do first?

Table 3.13.1. Descriptive Statistics of Rank for as a Local Administration by Status

	Count	Valid N	Mean	Median	Mode	Std Deviation
Improvement in infrastructure	572	N=443	4	5	5	1
More hygienic and clean Eastern Black Sea	572	N=480	4	5	5	1
Tidy common open places in the city	572	N=451	4	4	5	1
To facilitate the town with information desks and signals	572	N=465	4	4	5	1
Improve the pensions which do not ruin the vernacular architectural characteristics	572	N=468	4	4	5	1
More controlled travel agency activities	572	N=455	4	4	5	1
Order in transportation services	572	N=453	4	4	5	1
Standardization in prices	572	N=440	3	4	5	1
Others	572	N=51	3	2	1	2

STATUS TOURIST

	Count	Valid N	Mean	Median	Mode	Std Deviation
Improvement in infrastructure	263	N=190	4	5	5	1
More hygienic and clean Eastern Black Sea	263	N=222	4	5	5	1
Tidy common open places in the city	263	N=215	4	4	5	1
To facilitate the town with information desks and signals	263	N=212	4	4	5	1
Improve the pensions which do not ruin the vernacular architectural characteristics	263	N=212	4	4	5	1
More controlled travel agency activities	263	N=205	3	3	3	1
Order in transportation services	263	N=207	3	3	5	1
Standardization in prices	263	N=201	3	3	5	1
Others	263	N=37	3	3	1	2

STATUS TURKISH

	Count	Valid N	Mean	Median	Mode	Std Deviation
Improvement in infrastructure	309	N=253	4	5	5	1
More hygienic and clean Eastern Black Sea	309	N=258	4	5	5	1
Tidy common open places in the city	309	N=236	4	4	5	1
To facilitate the town with information desks and signals	309	N=253	4	4	5	1
Improve the pensions which do not ruin the vernacular architectural characteristics	309	N=256	4	5	5	1
More controlled travel agency activities	309	N=250	4	5	5	1
Order in transportation services	309	N=246	4	4	5	1
Standardization in prices	309	N=239	4	4	5	1
Others	309	N=14	3	2	1	2

Table 3.13.2. Count and Percentage of Rank for Improvement in Infrastructure by Status

Improvement in infrastructure

		STATUS		Total
		TOURIST	TURKISH	
1	Count	26	6	32
	% within STATUS	13,7%	2,4%	7,2%
2	Count	14	10	24
	% within STATUS	7,4%	4,0%	5,4%
3	Count	31	26	57
	% within STATUS	16,3%	10,3%	12,9%
4	Count	21	36	57
	% within STATUS	11,1%	14,2%	12,9%
5	Count	98	175	273
	% within STATUS	51,6%	69,2%	61,6%
Total	Count	190	253	443
	% within STATUS	100,0%	100,0%	100,0%

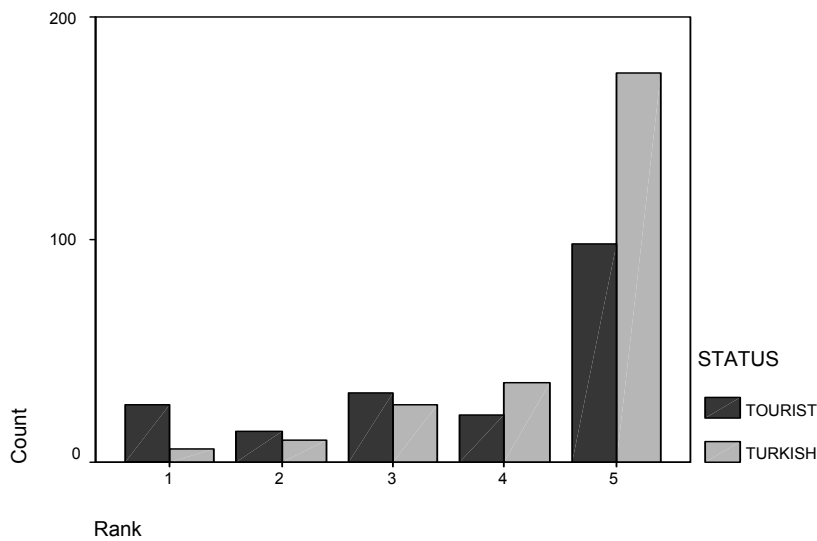


Figure 3.13.1. Histogram of Rank for Improvement in Infrastructure by Status

Table 3.13.3. Count and Percentage of Rank for More Hygienic and Clean Eastern Black Sea by Status

More hygienic and clean Eastern Black Sea				
		STATUS		Total
		TOURIST	TURKISH	
1	Count	20	9	29
	% within STATUS	9,0%	3,5%	6,0%
2	Count	12	12	24
	% within STATUS	5,4%	4,7%	5,0%
3	Count	31	28	59
	% within STATUS	14,0%	10,9%	12,3%
4	Count	45	37	82
	% within STATUS	20,3%	14,3%	17,1%
5	Count	114	172	286
	% within STATUS	51,4%	66,7%	59,6%
Total	Count	222	258	480
	% within STATUS	100,0%	100,0%	100,0%

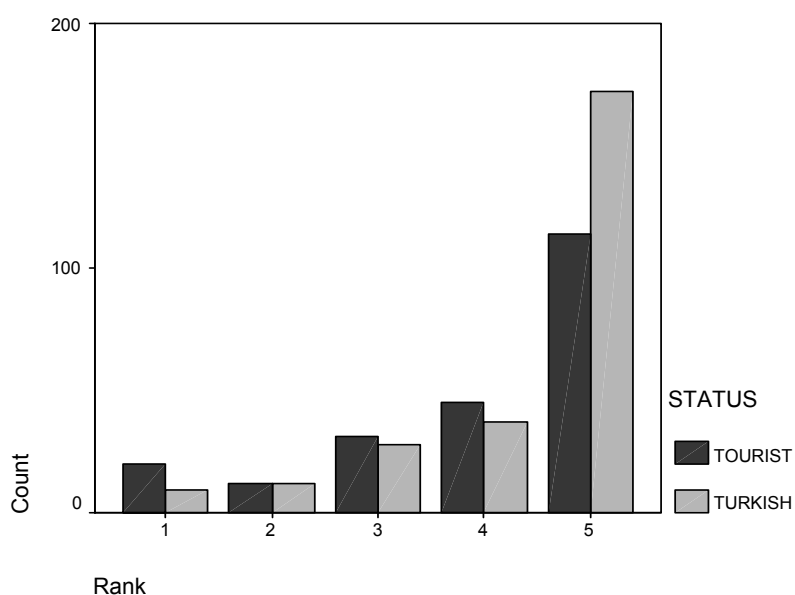


Figure 3.13.2. Histogram of Rank for More Hygienic and Clean Eastern Black Sea by Status

Table 3.13.4. Count and Percentage of Rank for Tidy Common Open Places in the City by Status

Tidy common open places in the city				
		STATUS		Total
		TOURIST	TURKISH	
1	Count	18	17	35
	% within STATUS	8,4%	7,2%	7,8%
2	Count	28	25	53
	% within STATUS	13,0%	10,6%	11,8%
3	Count	57	40	97
	% within STATUS	26,5%	16,9%	21,5%
4	Count	40	50	90
	% within STATUS	18,6%	21,2%	20,0%
5	Count	72	104	176
	% within STATUS	33,5%	44,1%	39,0%
Total	Count	215	236	451
	% within STATUS	100,0%	100,0%	100,0%

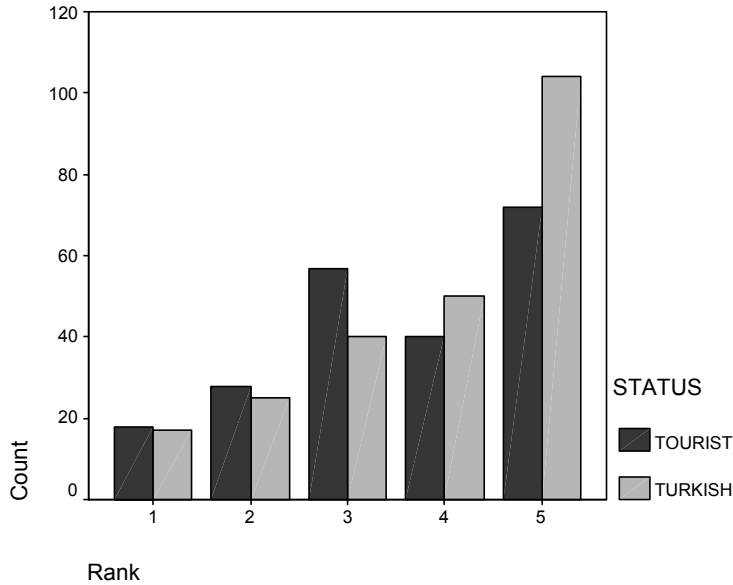


Figure 3.13.3. Histogram of Rank for Tidy Common Open Places in the City by Status

Table 3.13.5. Count and Percentage of Rank for To Facilitate the Town with Information Desks and Signals by Status

**To facilitate the town with information desks and signals**

		STATUS		Total
		TOURIST	TURKISH	
1	Count	21	11	32
	% within STATUS	9,9%	4,3%	6,9%
2	Count	20	11	31
	% within STATUS	9,4%	4,3%	6,7%
3	Count	44	40	84
	% within STATUS	20,8%	15,8%	18,1%
4	Count	59	67	126
	% within STATUS	27,8%	26,5%	27,1%
5	Count	68	124	192
	% within STATUS	32,1%	49,0%	41,3%
Total	Count	212	253	465
	% within STATUS	100,0%	100,0%	100,0%

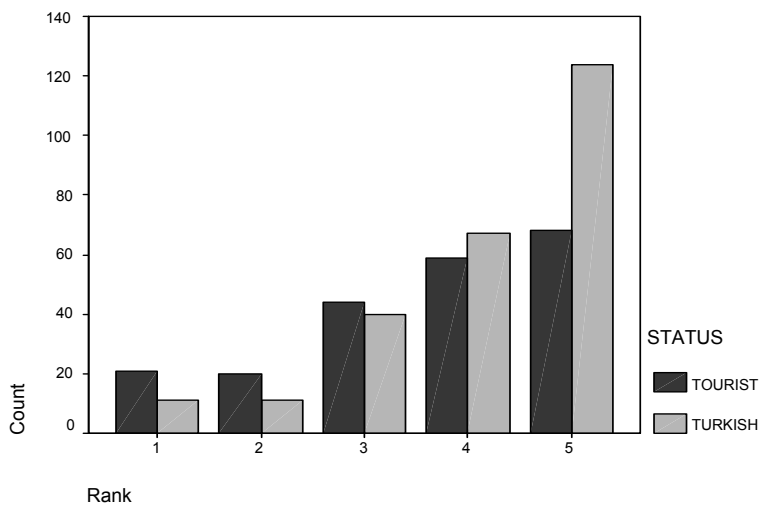


Figure 3.13.4. Histogram of Rank for To Facilitate the Town with Information Desks and Signals by Status

Table 3.13.6. Count and Percentage of Rank for Improve the Pensions which do not Ruin the Vernacular Architectural Characteristics by Status

**Improve the pensions which do not ruin the vernacular architectural characteristics**

		STATUS		Total
		TOURIST	TURKISH	
1	Count	23	10	33
	% within STATUS	10,8%	3,9%	7,1%
2	Count	26	18	44
	% within STATUS	12,3%	7,0%	9,4%
3	Count	52	22	74
	% within STATUS	24,5%	8,6%	15,8%
4	Count	33	54	87
	% within STATUS	15,6%	21,1%	18,6%
5	Count	78	152	230
	% within STATUS	36,8%	59,4%	49,1%
Total	Count	212	256	468
	% within STATUS	100,0%	100,0%	100,0%

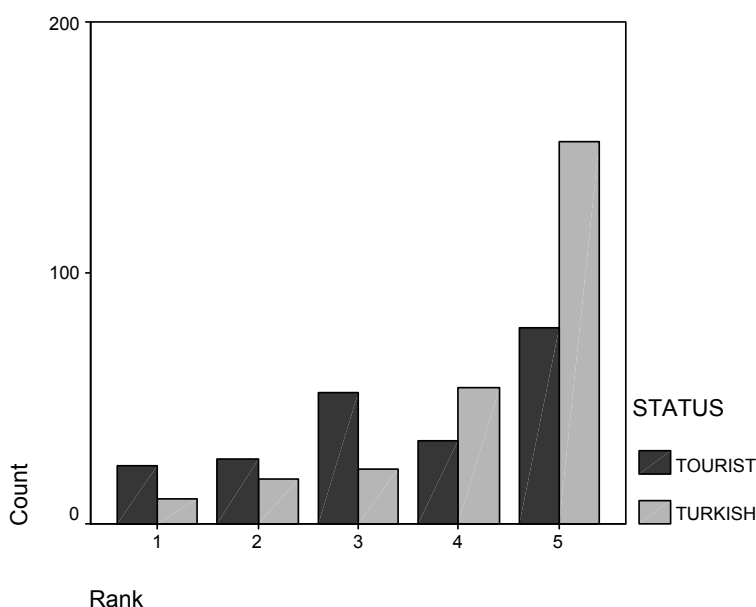


Figure 3.13.5. Histogram of Rank for Improve the Pensions which do not Ruin the Vernacular Architectural Characteristics by Status

Table 3.13.7. Count and Percentage of Rank for More Controlled Travel Agency Activities by Status

**More controlled travel agency activities (including guidance)**

		STATUS		Total
		TOURIST	TURKISH	
1	Count	32	14	46
	% within STATUS	15,6%	5,6%	10,1%
2	Count	19	15	34
	% within STATUS	9,3%	6,0%	7,5%
3	Count	58	36	94
	% within STATUS	28,3%	14,4%	20,7%
4	Count	39	59	98
	% within STATUS	19,0%	23,6%	21,5%
5	Count	57	126	183
	% within STATUS	27,8%	50,4%	40,2%
Total	Count	205	250	455
	% within STATUS	100,0%	100,0%	100,0%



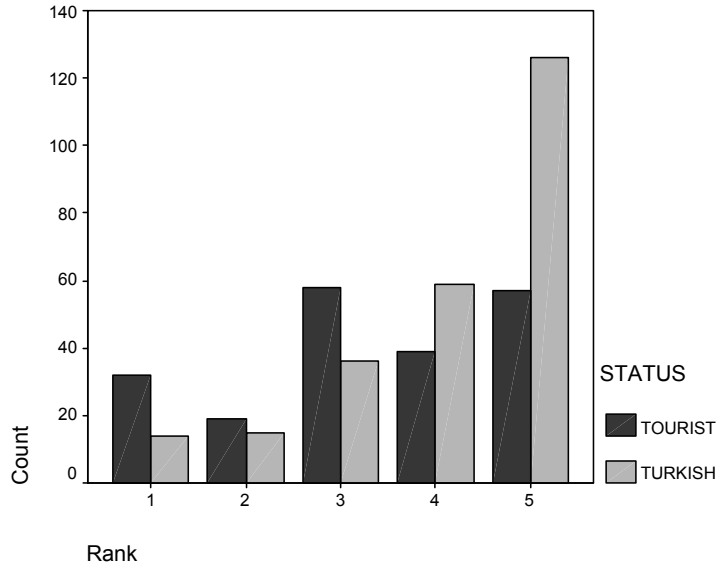


Figure 3.13.6. Histogram of Rank for More Controlled Travel Agency Activities by Status

Table 3.13.8. Count and Percentage of Rank for Order in Transportation Services by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	26	12	38
	% within STATUS	12,6%	4,9%	8,4%
2	Count	38	23	61
	% within STATUS	18,4%	9,3%	13,5%
3	Count	50	46	96
	% within STATUS	24,2%	18,7%	21,2%
4	Count	30	43	73
	% within STATUS	14,5%	17,5%	16,1%
5	Count	63	122	185
	% within STATUS	30,4%	49,6%	40,8%
Total	Count	207	246	453
	% within STATUS	100,0%	100,0%	100,0%

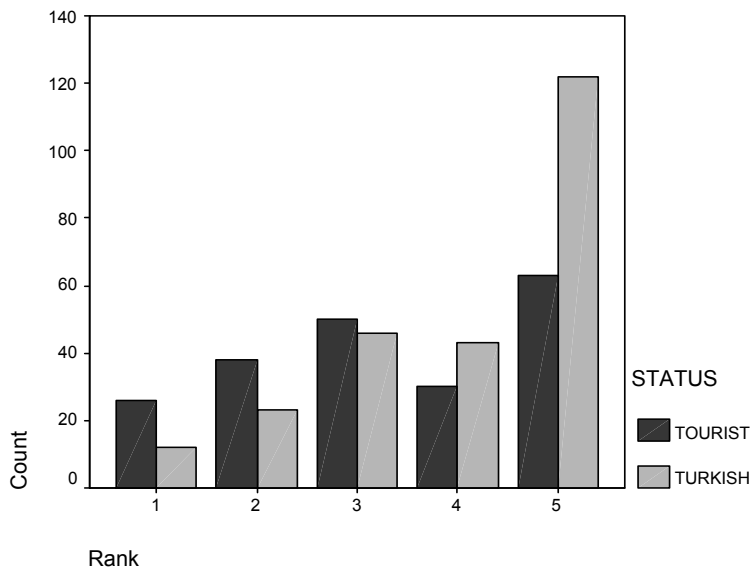


Figure 3.13.7. Histogram of Rank for Order in Transportation Services by Status

Table 3.13.9. Count and Percentage of Rank for Standardization in Prices by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	40	18	58
	% within STATUS	19,9%	7,5%	13,2%
2	Count	35	37	72
	% within STATUS	17,4%	15,5%	16,4%
3	Count	37	41	78
	% within STATUS	18,4%	17,2%	17,7%
4	Count	36	43	79
	% within STATUS	17,9%	18,0%	18,0%
5	Count	53	100	153
	% within STATUS	26,4%	41,8%	34,8%
Total	Count	201	239	440
	% within STATUS	100,0%	100,0%	100,0%

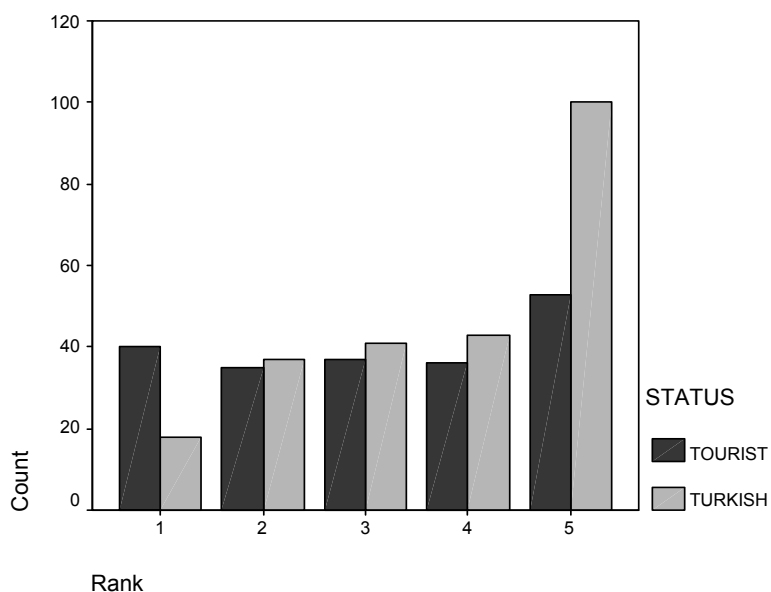


Figure 3.13.8. Histogram of Rank for Standardization in Prices by Status

Table 3.13.10. Count and Percentage of Rank for Others by Status

		STATUS		Total
		TOURIST	TURKISH	
1	Count	11	6	17
	% within STATUS	29,7%	42,9%	33,3%
2	Count	7	2	9
	% within STATUS	18,9%	14,3%	17,6%
3	Count	4		4
	% within STATUS	10,8%		7,8%
4	Count	5		5
	% within STATUS	13,5%		9,8%
5	Count	10	6	16
	% within STATUS	27,0%	42,9%	31,4%
Total	Count	37	14	51
	% within STATUS	100,0%	100,0%	100,0%

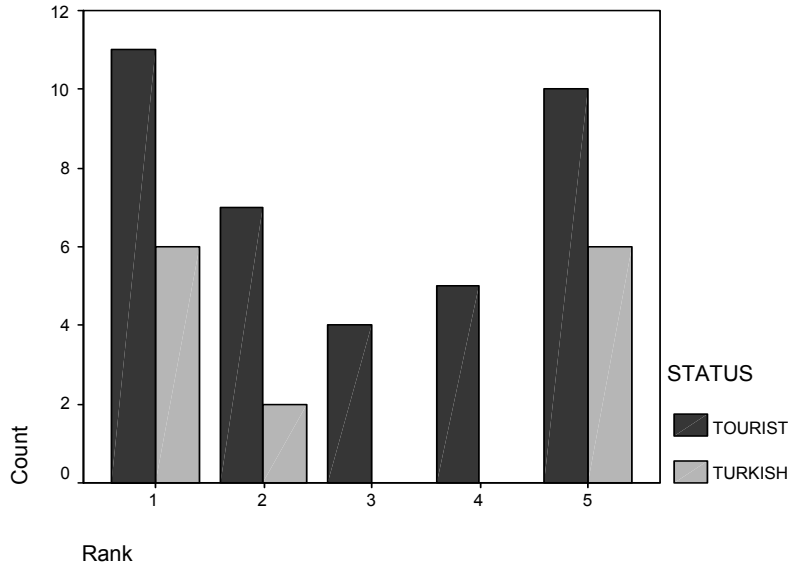


Figure 3.13.9. Histogram of Rank for Other by Status

## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX D: RESULTS OF TRAVEL AGENCIES AND TOUR OPERATORS SURVEYS**

## A. Questionnaire for Travel Agencies and Tour Operators

Name of the interviewer:	
City:	
The place of the interview:	
Other:	

**Name:**.....  
**Address:** .....  
**City:**.....  
**Tel:**.....  
**Fax:**.....  
**E-mail:**.....  
**Class:..**  
**Main specialty :** .....

**If any, please write your branch offices indicating towns.**

.....  
 .....  
 .....

### 1) What kind of tours are you organizing?

Vacation	
Education	
Cultural	
Health	
Recreation	
Nature	
Congress	
Other	

### 5) What kind of services do you provide in sightseeing tours?


### 6) How many tourists participate in your tours in average?

--	--

### 7) What kind of hotels would you prefer?

*	
**	
***	
****	
*****	

**8) What is the nationality of your tourist groups?**

Country	%

**9) Are you organizing congresses?**

Yes	No

**If yes;  
What kind of congresses are you organizing?**

Medical	
Informatics	
Education	
Vendor meetings	

**10) What's the education level of your personnel?**

	%
Elementary School	
Secondary School	
High School	
University	

**11) Which transportation services do you provide from the following?**

By car	
Bus/Van	
Horse/Donkey/Mule	
Bicycle/motorcycle	
4x4 off road vehicles	
Yacht	
Plane/Helicopter	

## **B. EVALUATION OF QUESTIONNAIRE FOR TRAVEL AGENCY AND TOUR OPERATORS**

### **1. Specifications of Travel Agencies and Tour Operators**

23 travel agencies have been interviewed, below is the distribution of the questionnaires according to the cities.

Distribution of the Cities

	Frequency	Percent
Artvin	1	4.3
Giresun	2	8.7
Rize	5	21.7
Trabzon	15	65.2
Total	23	100.0

Majority of the travel agencies locate in Trabzon, that's why most of the questionnaires have been made in Trabzon. Below is the distribution of the travel agencies in terms of categories.

Category

	Frequency	Percent	Cumulative Percent
Class A	14	60.9	60.9
Ticketing	6	26.1	87.0
Transferring	3	13.0	100.0
Total	23	100.0	

43% the A Class travel agencies locate in Trabzon and 35% of them are in Rize. 9 travel agencies state their category as 'Ticketing' and 'Transferring' all locate in Trabzon.

#### Main Specialty

	Frequency	Percent	Cumulative Percent
Travel	14	60.9	60.9
Rent A Car	2	8.7	69.6
Ticketing	4	17.4	87.0
Transferring	1	4.3	91.3
Visa Applications	2	8.7	100.0
Total	23	100.0	

#### Cities of The Branch Offices

	Frequency	Percent	Cumulative Percent
No Branch	18	78.3	78.3
Ordu	1	4.3	82.6
Rize	3	13.0	95.7
Trabzon	1	4.3	100.0
Total	23	100.0	

#### Number of Branch Offices

	Frequency	Percent	Cumulative Percent
1	3	60.0	60.0
2	1	20.0	80.0
10	1	20.0	100.0
Total	5	100.0	

## 2. Specifications of the Tours Organized by Travel Agencies and Tour Operators and Opinions Related to the Region

### Q1: What Kind Of Tours Are You Organizing?

Tour Organizations	Frequency	Percent
Vacatioan	12	52.20
Nature	10	43.50
Cultural	9	39.10
Congress	4	17.40
Education	3	13.00
Health	3	13.00
Recreation	3	13.00
Other	3	13.00

Distribution of the travel agencies according to the tours organized are shown at the table above. According to that table 12 from 23 (52%) are organizing tours for vacation, 10 of them (43.5%) are organizing nature tours, 9 of them (39.1%) are organizing culture tours.

**Q2: What is The Portion of Eastern Black Sea Region Tours Within Your Business Volume?**

Below is the table to show the portion of the Eastern Black Sea tours within the business volume of the travel agencies.

%	Frequency	Percent	Cumulative Percent
1.00	2	15.4	15.4
10.00	3	23.1	38.5
15.00	1	7.7	46.2
25.00	1	7.7	53.8
30.00	1	7.7	61.5
50.00	1	7.7	69.2
55.00	1	7.7	76.9
70.00	1	7.7	84.6
90.00	1	7.7	92.3
95.00	1	7.7	100.0
Total	13	100.0	

39% of the travel agencies stated that portion of the Eastern Black Sea Region is less than 10% within their business volume.

**Q3: In The Future What Would Be The Portion of Eastern Black Sea Region Tours Within Your Business Volume?**

	Frequency	Percent	Cumulative Percent
1.00	1	7.7	7.7
10.00	1	7.7	15.4
20.00	2	15.4	30.8
30.00	2	15.4	46.2
50.00	2	15.4	61.5
70.00	3	23.1	84.6
90.00	1	7.7	92.3
95.00	1	7.7	100.0
Total	13	100.0	

We can understand from the table that travel agencies have positive opinions about the future. Approximately 70% of travel agencies stated that in the future Eastern Black Sea Region's portion in their business volume will be between 20% and 70%.

**Q4: What Are Your Positive Opinions Regarding The Future of The Region?**

Opinions	Frequency	Percent
Natural Beauties	13	65.0
Tourism Activities.	5	25.0
Plateu Tourism	2	10.0
Total	20	100.0

Regarding the positive opinions about the future of the region natural beauties have the biggest portion.



Q5: What Are Your Negative Opinions Regarding The Future Of The Region?

Opinions	Frequency	Percent
Problems With The Facility	6	31.6
Government Policy	4	21.2
Finance And Shortness Of The Season	3	13.0
Tourism Applications	2	10.5
Wrong Promotion And Insufficient Travel Agency	2	8.7
Highway Problems	1	5.1
Accommodation Problems	1	5.1
Total	19	100.0

With a percentage of 32% facility problems come as the first negative affect.

Q6: What is The Route of The Tours You Organize?

Route	Frequency	Percent
Trabazon,Rize	2	15.4
Artvin and neighbour districts	1	7.7
Kastamonu,Sinop,Samsun,Ordu,Trabzon,Artvin,Rize	1	7.7
Rize,Trabzon,Artvin	1	7.7
Samsun,Ordu,Giresun,Trabzon,Rize,Sarp and plateaus	1	7.7
Sümela,Uzungöl, Duit,Ayder	1	7.7
All roytes from Trabazon to Kaçkar's	1	7.7
Trabzon,Rize,Giresun,Samsun	1	7.7
Trabzon,Rize, Giresun	1	7.7
Trabzon and districts	1	7.7
Trabzon ,Artvin	1	7.7
Trabzon,Erzurum	1	7.7
Total	13	100.0

Q7: Alternative Routes That You Are Planning To Organize A Tour.

The Alternative tour routes have been given at the table below. The difference with the existing tours made by adding new districts to the routes.

Sinop, Kastamonu,Amasya
Rize,İspit,Palandöken
Çoruh, Mountain tourism
Artvin
Trabzon,Erzurum,Kars
Samsun, Sinop, Bolu,Bartın,Düzce
Trabzon,Rize,Ordu

Q8: The Locations of The Lodging Facilities Where You Accommodate In The Tour

Rize, Trabzon, Artvin
Trabzon, Ordu-Ünye, Rize-Çayeli
Trabzon, Rize, Artvin
Trabzon, Erzurum
Trabzon-Maçka, Artvin, Ayda
Trabzon, Rize
Trabzon, Rize, Artvin
Trabzon, Ordu, Giresun, Rize

Positive and Negative Opinions About The Region

The positive opinions of travel agencies and tour operators are all about variety of natural beauties. Approximately 90% of them have answered the question as this. Below the table shows the negative opinions of the travel agencies and tour operators:

Issues	Frequency	Percent
Transportation, Infrastructure	3	18.75
Insufficient accommodation	3	18.75
Incomplete facilities	2	12.50
Istanbul centered tours	1	6.25
Unprotected natural Beauties	1	6.25
Transportation, Accommodation	1	6.25
Shortness of the season	1	6.25
Sea Transportation	1	6.25
Security	1	6.25
Historical Masterpieces are not in use	1	6.25
Financial Concerns	1	6.25
Construction in Plateaus	1	6.25
No investment, Unskilled Travel Agencies	1	6.25

45% of the travel agencies suffer from the deficiencies in infrastructure, transportation and accommodation opportunities.

The table below indicates the kind of congresses they organize.

	Frequency
Medical	3
Informatics	2
Education	2
Vendor Meetings	3

2 of these 4 companies have stated that they were organizing all kind of meeting above.

Organization of Congress

	Frequency	Percent
Yes	4	17.4
No	16	69.6
Total	20	100.0

Approximately 70% of the travel agencies responded as 'no' to the question which asks if they were organizing congresses. 4 companies have answered as 'yes' 3 of them are in Rize and 1 of them is in Trabzon.

### 3. Specifications of the Tourist Groups

#### Nationality of the Tourists

Nationality	Frequency	Percent
Turkey	9	69.23
Israel	1	7.7
Germany	1	7.7
Avustralia,Canada,USA,Germany,England,Israel	1	7.7
France	1	7.7
Total	13	100.0

As seen at the table approximately 70% of the travel agency's customers are Turkish.

#### The Subjects That Make Tourists Satisfied and Happy

The table below shows the percentage of the subjects that satisfy the tourists.

	Frequency	Percent
Natural Beauties	8	72.7
Guidance,transfer,service	2	18.2
Care	1	9.01

According to the statement of 8 travel agencies, 73% of the tourists are impressed by natural beauties.

#### The Subjects That Make Tourists Unhappy

The issues which disturb the tourists have been indicated below;

	Frequency	Percent
Unplanned construction	3	30.0
Insufficient transportation and facility	2	20.0
Lack of recreation	1	10.0
Shortness of shopping places and modifications in Sümela monastery	1	10.0
Behaviors of People	1	10.0
Cars without A/C and bad service	1	10.0
Pollution	1	10.0

Half of the travel agencies who answered this question have stated that 'Unplanned Construction' and 'Insufficient transportation and accommodation opportunities' affects the tourists negatively.

#### Number of the Tourists Participate The Tours

The number of tourists who visited the region by the tours of the travel agencies in the region has indicated below:

Number of Tourists	Frequency	Percent
-20	2	11.1
20-30	10	56.0
30-40	4	22.2
50-	2	11.1

According to the frequency distribution table above, it can be said that number of tourists who participate in tours is 28 in average.

## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX E: ENVIRONMENTAL ASSETS**

## **Environmental Assets**

### **Factors Determining the Development of Tourism Sector**

In its many sections, the Report refers to the requirement that the natural and cultural assets must be activated to urge the development of tourism in the region. To a significant extent, the inventory, scientific research and records of these assets are being maintained by the Environment and Forest Ministry and the Culture and Tourism Ministry. These Ministries are also legally authorized to draft development plans for areas where such assets concentrate.

The proceeding explanations should be assessed within this framework.

### **Environmental Assets and Measures to Be Taken**

In Turkey, the present preservation statuses for natural and cultural assets are: national parks, nature parks, nature reserves, nature monuments, gene preservation sites, protected forests, special environmental preserves and wildlife preserves identified by the Environment and Forest ministry and other natural, urban, archaeological and historical sites identified by the Culture and Tourism Ministry.

In this context, there are numerous natural and cultural assets in the region under different statuses of preservation. The largest preserves take place in zones included in the forest regime.

### **National Parks and Other Preserves**

The National Parks Law No. 2873 which became effective in 1983 provides legal definitions for preservation statuses.

#### **i. National Parks**

The law defines a national park as “a piece of nature that has scientifically and aesthetically rare, national or international, natural and cultural resource assets and preserves, recreational and tourism areas”.

The law sets forth the criteria for designation of a national park as follows:

- Natural and cultural resource assets and their recreational potential should have national or international features and importance.
- Resource assets should be as important as they would be inherited by the future generations as heritages, who would be proud of having them.
- Resource assets should have not been disturbed or should be able to be rehabilitated by technical or administrative interventions.
- Save for special cases and islets, minimum size of the area should be 1,000 hectares for purposes of the density of resource assets, which area should be consisting of entirely preservation-weighted zones. Development areas for administrative and tourism purposes are excluded from this minimum size of area.

Today, there are 33 national parks covering a total area of 686,631 hectares under the National Parks Law. These have a big importance for purposes of forests, steppes, wetlands and bio-diversity in coastal ecosystems.

In the region, there are 4 national parks, including Altındere Valley (Trabzon), Kaçkar Range (Rize, partly Artvin), Hatilla Valley (Artvin) and Karagöl-Sahara (Artvin).

## **ii. Nature Park**

The law defines a nature park as “a piece of nature with a rich vegetation and wildlife, suitable for the recreation and entertainment of people in an integral landscape”. The law provides that areas to be designated as nature parks should:

- Have a nationally or internationally super natural physio-geographic structure, vegetative and wildlife features, landscape beauties and a recreational potential.
- Be of an adequate size to ensure resource and landscape integrity.
- Have a different and rich potential for purposes of outdoor recreation.
- Be containing interesting examples of local mores and traditions, traditional land use order and cultural landscapes.
- Be a State property.

In Turkey, there are 17 nature parks covering 69,505 hectares, designated for this purpose. One of them, Artebel Lakes (Gümüşhane) take place in the Region.

## **iii. Nature Preserve**

The Law No. 2873 defines a nature preserve as “a piece of nature that contains scientifically and educationally important, rare, endangered or likely-to-extinct ecosystems, species and distinguished examples of natural events, is designated exclusively for purposes of science and education and that must strictly be preserved”. Nature preserves have the strictest preservation status among the current nature preservation mechanisms.

The same law seeks the following criteria for the designation of an area as a nature preserve:

- It should be sheltering nationally or internationally typical, unique, rare, endangered or likely-to-extinct ecosystems, species and examples of natural and traditional land use forms developed or concealed by natural events.
- Generally, it should have sensitive ecosystems, habitats or forms of life, important biological or geological varieties or rich genetic resources. Such features and differences of it should have been determined by science, educational or research institutions or relevant organizations.
- It should be sufficiently large enough to ensure a long life for the assets that must be preserved.
- It should be a State-owned property.

In Turkey, there are 35 nature preserves of 85.024 hectares. In the planning area, however, there are four nature preserves: Çamburnu (Artvin), Camili-Efeler (Artvin), Camili-Gorgit (Artvin) and Spider Forest (Gümüşhane).

## **iv. Natural Monument**

A nature monument is defined as a piece of nature that has features and scientific assets developed by natural events and is preserved under the National Parks Law. The criteria for designation as a nature monument:

It should be sheltering one or several geological or geomorphologic formations developed by natural events, that have national scientific or aesthetic importance due to their uniqueness or rarity and exceptional assets such as plant species. It should have seen no or slight damages particularly from human activities. It should be smaller than a national park but sufficiently enough to ensure integrity for purposes of preservation. It should be a State-owned property.

In Turkey, there are 89 nature monuments covering 464 hectares, and 10 of them are located in the Region. They are: Kirani Evliya Juniper, Aliağa's Poplar Tree, Spider Forest Spruces and Spider Forest Firs.

#### **v. Other Preservation Statuses**

In Turkey, there are also other preservation statuses than those above. One of them is the wildlife preserve, which is proclaimed for purposes of the protection, development and survival of the game and wild animals and their habitats and the transfer of the same to future generations in the best condition.

A natural site means a rare preserve and immovable natural asset that has interesting features and beauties.

A special environmental preserve means an area that offers an integrity of natural and cultural assets of both national and international significance.

In addition, under section 23 of the Forest Law No. 6831, *safeguarding forests* located in areas exposed to landslides or washing away by rains, and State-owned forests which safeguards the air of inhabited areas, roads and railroads against dust and sand storms and prevents river beds from being filled or are deemed necessary for the defense of Turkey and areas which are covered with maquis or heaths shall be permanently protected and other State-owned forests which are damaged or fire-burnt shall be protected by the Forest Ministry until they will have become production forests again.

As of 2003, there are 37 safeguarding forests in Turkey, covering a total area of 403.000 hectares.

#### **Basic Planning and Preservation Guidelines for National Parks and Other Preserves**

Under the National Parks Law No. 2873, long-term development plans and management plans should be prepared, taking land use decisions which will form a basis for the use of such areas by protecting them and which will also accelerate the economic development of people living in and around them. Article 4 of the Law provides that "in order to accomplish the purposes of protection and use set forth for areas designated as national parks under this law, taking into consideration their features and qualities, development plans for their organization, development and management will be prepared subject to positive opinions of respective Ministries and with their actual contributions in case of necessity". In addition, article 8 of the Law and article 23(a) of the relevant Regulation brings further clarification to the issue. Accordingly, "Unless national park long-term development plans are finalized, no permit will be granted for the site, and the preparation of long-term development plans is a must for the implementation of any use, structure or facility".

In this context, the planning for the areas referred to above is being carried out by the General Directorate for Nature Preservation and National Parks. Basic objectives of such planning efforts appear to be the following:

- Ensure the permanence of resource assets
- Accelerate the socioeconomic development of local people
- Develop land use decisions to ensure the balance of preservation and use
- Put forth the legal ground for a feasible plan.

Planning efforts undertaken by the General Directorate for Nature Preservation and National Parks particularly by using external funds use a participatory approach. These efforts urge



the participation of local people living in areas under preservation in the preservation and implementation work and aim at minimizing negative impacts.

Long-term development plans and management plans for national parks, nature parks and nature preserves are being prepared according to the following basic principles:

- The natural and ecological equilibrium and natural ecosystem assets shall not be disturbed and the wildlife shall not be damaged.
- Neither interventions that cause or might cause the loss or change of the features of such areas nor acts or operations that would create soil, water and air pollution or other similar environmental problems shall be done.
- No production of any forest products, hunting or grazing that would upset the natural equilibrium shall be done. However, such acts may be permitted basing on plans prepared and taking into consideration the peculiarity of the area.
- Save for structures and facilities depicted on approved plans and any facilities deemed necessary by the Office of the Chief of General Staff for the defense system and unless they are indispensable and strictly necessary purposes of public benefit, no structures or facilities shall be built or managed in such areas under any circumstances whatsoever nor any inhabitation shall be permitted outside the settlement areas already existing there.
- Identification of resource assets and guidelines for preservation and use take scientific and technical research into account to a great extent to ensure the preservation of natural characters of resources strictly and their permanence.
- It is forbidden to manage natural resources in an unplanned and unsustainable manner.
- No activity that would spoil the natural equilibrium and the landscape integrity and would not agree with the intact character of the natural environment shall be permitted.
- Such areas shall be equipped with minimum infrastructure for purposes of exclusively preservation, management, research and educational uses (visitor and comment center, guidance and information points, pathway arrangements, etc). Guidelines for such facilities and site applications shall be included in plans.
- Conditions and levels of use and exploitation shall be determined by the management and the “bearing capacity” shall not be exceeded.
- Interventions with natural and cultural resources exclusively for purposes of completion and restoration, without degrading their resource value, can be carried out by taking into consideration the objectives of intervention and the natural ecosystem in the area.

In such planning, the basic technical guideline for land use is zonings, which contain:

- Areas of absolute preservation
- Areas of limited use
- Areas of controlled use.

In planning, general provisions for the entire area and implementation rules and guidelines for each zoning are provided.

Management plans must also be prepared to accomplish applications envisaged for areas of preservation.

### **Basic Planning Guidelines for Areas of Preservation Status in East Black Sea Region**

Considering statuses and legal physical planning powers for the preservation areas defined above, opinions of the General Directorate for Nature Preservation and National Parks were received and information on the approved or ongoing planning efforts were compiled. Similarly, opinions of all other authorized public organizations were received and their work was assessed.

The said General Directorate wants the adoption of the following basic guidelines for the East Black Sea Region.

- Minimize impacts upon ecosystems.
- Provide alternative economic resources for the area-dwellers.
- Uncover natural and cultural assets of the area and knowledge and skills of local people.
- Offer training and awareness-raising opportunities to both visitors and local people.
- Further cooperation with local people to urge them to act as the owner of and preserve assets in which they live.
- Urge the formation of organizations to enable local people to act together
- Ensure the establishment of a financial mechanism to provide self-sufficiency for the area
- Undertake monitoring and evaluation efforts to reveal positive and negative effects of activities
- Prepare eco-tourism inventories for each province included in the project implementation areas and put forth the status of each area
- Produce a typical design, taking into consideration area-specific local architecture and materials for building development
- Observe the use of hard soils and areas for building development
- Not to permit building development particularly in Plateaus and, if compulsory, resort to the restoration of existing Plateau houses
- Try to meet certain basic needs of visitors in district towns
- Re-assess trout restaurants and farms established at close intervals around rivers and creeks particularly without undertaking a feasibility study and render them operable at certain locations and within certain criteria
- Identify optimum activities for implementation areas which would not inflict any negative visitor impact, considering their bearing capacities, and undertake awareness-raising and training efforts

The Small-Scale Development Study for Tourism Sector Development in East Black Sea Region uses an approach which includes the opinions above. Proposals are developed in line with the scale and detail of the Regional Development Plan.

The General Directorate for Nature Preservation and National Parks states that management plans for preserves in the Region have continued. For this reason, it was not possible to detail these plans.

Notwithstanding, suggestions of the nature of guidelines developed in this study for preserves involve, as may be seen in respective sections of the Report, probable zonings and associated uses to a great extent.

## Flora ve Fauna

Table 1: Flora of the Region

No	Systematics
1	<b>Wood Type Plants</b>
1.1	Abies Nordmannia
1.2	Picea Orientalis L.
1.3	Pinus Silvestris L.
1.4	Taxus Baccata
1.5	Castanea vesca
1.6	Acer campestre
1.7	Alnus Glutinosa
1.8	Populus tremula
1.9	Ulmus Campestris
1.10	Ostrya carpinifolia

1.11	Betula Verrucosa
1.12	Sorbus aucuparia
1.13	Fraxinus angustifolia
1.14	Juglans Regia
1.15	Rhododerndron caucasicum
1.16	Rhododerndron Simirnovii
1.17	Hedera helix
1.18	Laurocerasus officinalis
1.19	Sambucus Nigra
1.20	Vitis vinifera
1.21	Rhus Coriaria
1.22	Ilex aquifolium
1.23	Vibirum Lantana
1.24	Cornus Sanguinea
1.25	Qersus deshorochensis
1.26	Alnus barbata
1.27	Olea Europea
1.28	Artemisia austriaca
1.29	Astragualus microcephalus
1.30	Capparis ovata
1.31	Sedum sempervivoides
1.32	Antemis triumfetti
1.33	Arbutus andrachne
1.34	Cistus creticus
1.35	Cistus salvifolius
1.36	Cotinus coggygria
1.37	Jasminum fruticans
1.38	Paliurus spina-christi
1.39	Rhus coriaria
1.40	Morus alba
1.41	Punica granatum
1.42	Vitis vinifera

Source: Dr Sümerkan and"Others, the assesmant of Natural and Cultural Assets of Çoruh River Basin on Tourism and Recreation Planning, KTÜ, 2000.

Table 2: Flora of the Region

No	Systematics
2.	<b>Grasslike Plants</b>
2.1.	Aconitum nasutum
2.2.	Adiantum capillus-veneris
2.3.	Anemone narcissiflora
2.4.	Anthyllis vulneraria sub sp polyphylla
2.5.	Aster caucasicus wild
2.6	Astragalus glycyphllos subsp. Glycphllos
2.7	Astrantia helleborifolia
2.8	Campanula lactiflora
2.9	Chamaesciadum acaule
2.10	Cheilanthes persica
2.11	Cirsium obvallatum
2.12	Cystopteris fragilis
2.13	Daphne glomerata
2.14	Draba hispida
2.15	Eryngium giganteum
2.16	Geranium psilostemon
2.17	Geranium robertianum
2.18	Geranium sylvaticum
2.19	Geum cocineum
2.20	Helleborus orientalis
2.21	Heracleum sphondyliumsubsp cylocarpum
2.22	Hypericum bupleuroides
2.23	Inula orientalis
2.24	Lathyrus aureus
2.25	Lathyrus roseus

2.26	Lathyrus vernus
2.27	Lilium monadelphum
2.28	Lycopodium alpinum
2.29	Lycopodium annotinus
2.30	Lycopodium clavatum
2.31	Lycopodium complanatum
2.32	Lycopodium selago
2.33	Nigella latiseca
2.34	Onobrychis armena
2.35	Ophioglossum vulgatum
2.36	Orchis punctulata
2.37	Oxytropis pallasii
2.38	Pachyphragma macrophyllum
2.39	Papaver lateritium
2.40	Pedicularis atropurpurea
2.41	Polygonum bistorta subsp. Carneum
2.42	Polypodium australe
2.43	Potentilla elatior
2.44	Potentilla erecta
2.45	Potentilla recta
2.46	Primula pallasii
2.47	Ranunculus oreophilus
2.48	Rumex alpinus
2.49	Senecio platphillus
2.50	Telekia speciosa
2.51	Thelypteris phegopteris
2.52	Trifolium repens
2.53	Valeriana alliarifolia

Source: Dr Sümerkan and"Others, the assesmant of Natural and Cultural Assets of Çoruh River Basin on Tourism and Recreation Planning, KTÜ, 2000.

Tablo 3: Fauna of the Region

No	Systematics
1	<b>Mammals</b>
1.1	Canis aureus
1.2	Canis Lupus
1.3	Capra aegagrus aegagrus
1.4	Lepus europeaus
1.5	Lynx lynx
1.6	Martes martes
1.7	Meles meles
1.8	Panthera pardus tuliana
1.9	Rupicapra rupicapra
1.10	Sus scrofa
1.11	Ursus arctos
1.12	Vulpes vulpes
2	<b>Birds</b>
2.1	Accipiter brevipes
2.2	Alectoris chukar
2.3	Anas strepera
2.4	Aquila rapax
2.5	Aquila heliaca
2.6	Asio otus
2.7	Buteo lagopus
2.8	Columba livia
2.9	Corvus corax
2.10	Corvus coronecornix
2.11	Corvus monedula
2.12	Coturnix coturnix
2.13	Denrocopos major
2.14	Falco peregrinus
2.15	Grus grus
2.16	Neophron percnopteus
2.17	Pica pica

2.18	Scolopax rusticola
2.19	Tetraogallus caspius
2.20	Turdus merula
3	<b><i>Fishes</i></b>
3.1	Salmo trutta
3.2	Cyprinus carpio
3.3	Silunus glanis
3.4	Barbus cycloopsis

Source: Dr Sümerkan and"Others, the assesmant of Natural and Cultural Assets of Çoruh River Basin on Tourism and Recreation Planning, KTÜ, 2000.

## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX F: CULTURAL ASSETS**

## Cultural and Natural Assets and Studies of Ministry of Culture and Tourism

There are numerous sites in the region. These have been proclaimed as such under the Cultural and Natural Assets Preservation Law No. 2863. A list of sites is provided in the Appendices section. The large size of this list proves the cultural and natural potential of the region. This potential should be preserved and made available to the sector.

Preservation plans have been prepared for some of the sites. These plans were prepared in the understanding of planning which is highly common in Turkey.

The basic planning principle is to maintain the balance between preservation and use. Depending on the nature of preservation areas and the existing type of development, plans define proposed land use and density, building type, size and materials, harmony with surrounding uses and clearances. "Coefficient" is the commonly used measure of density. As such proposals give details of building implementation, they are highly specific beyond the content of this study. Furthermore, it is importantly emphasized that individual buildings located in sites should be made available to the sector.

## Tourism Centers and Plans of the Ministry of Culture and Tourism

An important contribution by the Culture and Tourism Ministry to the development of the tourism sector has been the proclamation of tourism centers in the region and the support of the sector with this status. A list of tourism centers in the region is provided below.

To a large extent, this support was in the form of the elaboration of development plans for tourism centers and a contribution to the infrastructure. A list of tourism centers in the region is provided below.

Table 1: Tourism Centers (TC) Proclaimed by the Culture and Tourism Ministry

Tourism Centers of Plateau Nature	Tourism Centers of Both Skiing Center and Plateau Nature	Tourism Centers of Both Warm Bath and Plateau Nature
Artvin-Kaçkar T.C.	Giresun (Bulancak)-Bektaş Plateau T.C.	Rize(Ç.Hemşin)-Ayder Warm Bath T.C.
Artvin-Kafkasor T.C.	Gümüşhane-Zigana T.C.	
Giresun-Kümbet Plateau T.C.		
Giresun-Yavuzkema Plateau T.C.		
Ordu (Akkuş)-Argın Plateau T.C.		
Ordu(Aybastı)-Perşembe Plateau T.C.		
Ordu Çambaşı Plateau T.C.		
Ordu (Mesudiye)-Keyfalan Plateau T.C.		
Ordu (Mesudiye)-Yeşilce Topçam Plateaus T.C.		
Rize Anzer T.C.		
Trabzon(Akçaabat)-Karadağ T.C.		
Trabzon(Araklı)-Pazarcık Plateau T.C.		
Trabzon(Araklı)-Yeşilyurt Yılantaş Plateau T.C.		
Trabzon(Çaykara)-Uzungöl T.C.		

Source: Explanatory Note prepared by the Culture and Tourism Ministry for the Small-Scale Development Study for Tourism Sector Development in East Black Sea Region, 2003.

Most of the development plans for tourism centers have been approved. However, there are some plans yet not approved in association with ownership problems in particular.

Plans for tourism centers were also prepared in the traditional understanding of development plan. All of the tourism centers are located on Plateaus in the inland of the region. For this reason, a special care has been taken on plans to conform to the locality-specific settlement pattern and architectural form. This is perceived as a respect to the environment.

In general, plans satisfy the following requirements.

- In building development, gradients, topography and the ownership pattern shall be taken into consideration.
- In general, the maximum number of stories shall be 2 and the construction ratio shall be 0,20 to 0,40 for housings. In addition, the base level is defined as 0,50 m, the minimum building clearance is defined as 10 m.
- Amenities shall be adjacent to the main building.
- Housing buildings shall be usable for boarding purposes.
- Lateral level differences shall not be used to gain additional stories.
- The narrow face to large face ratio is defined for buildings.
- The solid to void ratio is defined for building faces.
- The horizontal side to vertical side ratio is defined for windows.
- Buildings shall be constructed from wooden material. The basement shall be constructed from natural stone material.
- Open or enclosed jumps shall not be built.
- Roofs shall be gable roofs having a pitch of 35% to 45%.
- The eave width shall be 0,50 to 0,80 cm. Eave buttresses decorated with motifs may be used.

These requirements should be assessed as the indication of a good-will approach. Detailed examples of planning decisions are provided in the Appendices section.

At this point, an important issue is the dispersion of authority observed in the plan preparation and implementation process caused by the fact that some of tourism centers are located in national parks.

On the other hand, it must be said that development plans for tourism centers have no chances of implementation. As those plans use a traditional approach, they do not incorporate implementation-guiding elements such as the construction and management of infrastructure and amenities, the financial aspect of and financing possibilities for investments, public participation, probable form and level of organization, etc.

In order to remove the restraints referred to above, the preparation of an Area Management Plan was proposed within the scope of this study to guide developments, and its importance was emphasized.

### **Provincial Tourism Inventories and Tourism Development Plans Conducted by the Ministry of Culture and Tourism and Governorships**

Since early 1990's, the Culture and Tourism Ministry has also financed the preparation of Provincial Tourism Inventories and Tourism Development Plans. These plans were prepared for all regional provinces.

The plan compiles an inventory of natural and cultural assets of each province and describe bottlenecks to the sector, if any. Proposals are formulated to remove such bottlenecks and activate resources. Furthermore, the plan predicts the number of beds for target years. The plan also includes institutional arrangement proposals.



The said plans were carefully evaluated within the scope of this study and their basic proposals are summarized in the Appendices section. In studies, important and consistent proposals were produced to preserve and develop the nature and cultural assets. Resources to be particularly activated overlap this study to a significant extent.

Furthermore, the plans were an important source in determining the condition of natural and cultural assets taken to evaluation in these studies in 1990's.

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## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX G: PROJECTIONS OF NUMBER OF BEDS**

## Projections of Number of Beds

In order to find out both the volume of investment and tourism revenues and determine the input demandable by the tourism sector from other sectors, it is necessary to predict the numerical values attainable by the sector as of the end of the Planning Period,

Stays, Night Spent and number of number of beds are predicted to be the magnitudes on which the tourism sector will show development in 2023. Numerical values were found out by formulating three alternatives.

In all alternatives, predictions were made using the pattern  $P_{(t+1)} = P_{(t)} * (1+r)^t$ .

Where,

$P_{(t+1)}$  = Number of beds in the target year (2023 for this prediction)

$P_{(t)}$  = Number of beds in the initial year (2002 for this prediction)

$r$  = Average annual rate of growth (rate of increase in 1996-2002 for this prediction)

$t$  = Difference between the initial year and the target year (21 years for this prediction)

### Alternative 1 (tendency—rate of increase in number of beds in 1996-2002 continued)

In alternative one, it is assumed that the rate of increase seen in the numbers of stays and number of beds in the period 1996 to 2002 will continue. Accordingly, the number of stays will rise to 1,250,000 and that of Number of Beds will rise to 34,000.

However, as tendencies will be continuing, night spent will not increase as much as stays will. For this reason, decrease in the occupancy of facilities will also continue. In the plan target year, the rate of occupancy will realize at 17% only.

This alternative would obviously not be realistic from the management point of view.

### 3.1.2 Alternative 2 (increase in night spent and occupancies)

This alternative aims at solving the problem observed in alternative one. According to this alternative two, measures will be taken during the planning process, whereby night spent will increase and rise to average 3 night spent for Foreigner visitors and average 2 night spent for national visitors. Taking into consideration the regional climatic conditions and the seasonal demand fluctuations of developable types of tourism, rates of occupancy will remain at 40 %. In this case, the regional number of beds is predicted to be 32,700.

### 3.1.3 Alternative 3 (improvement on all operational indicators)

This alternative was produced by improving the assumptions taken for the first two alternatives and reflects the results of a high performance targeted in the tourism sector. Accordingly, both night spent and rates of occupancy will see a stable rise. With measures to be taken in the planning process, alternative tourism activities will increase, extending over the year as much as possible, thereby average stay times will become longer and rates of occupancy will rise.

According to the results of this alternative, the occupancy will rise to the level of 50s% while night spent will increase to 5 million and the number of beds will become about 30,000.

These figures indicate a relatively low initial investment cost and a high efficiency in the sector. This is in line with the target of a high level of performance for enterprises as put forth

in this study. For this reason, calculations for investment costs and others were based on the results of this alternative 3.

Table 1: Alternative 1 - Ministry-Licensed Facilities (rate of increase in number of beds in 1996-2002 continued)

Years	Number of Arrivals			Night Spent			Number of Beds	Rate of Occupancy (%)
	Foreigner	National	Total	Foreigner	National	Total		
2002	65,377	287,185	352,562	90,637	383,079	473,716	4,548	29
2008	131,183	423,404	554,587	157,486	537,041	694,527	7,694	25
2013	295,625	665,958	961,582	300,033	796,489	1,096,522	14,206	21
2018	528,184	920,324	1,448,508	475,463	1,055,470	1,530,933	22,016	19
2023	748,190	1,117,474	1,865,664	626,738	1,249,699	1,876,436	28,634	18

Table 2: Alternative 1 - Municipality-Licensed Facilities (rate of increase in number of beds in 1996-2002 continued)

Years	Number of Arrivals			Night Spent			Number of Beds	Rate of Occupancy (%)
	Foreigner	National	Total	Foreigner	National	Total		
2002	60,668	398,095	458,763	90,019	472,756	562,775	12,704	12
2008	18,253	297,092	315,346	29,736	345,746	375,482	9,788	11
2013	4,496	165,463	215,656	8,167	240,011	248,177	7,221	9
2018	1,652	165,463	167,115	3,245	184,926	188,170	5,810	9
2023	906	142,940	143,846	1,865	158,146	160,010	5,100	9

Table 3: Alternative 1 - Total Facilities, Ministry-Licensed and Municipality-Licensed (rate of increase in number of beds in 1996-2002 continued)

Years	Number of Arrivals			Night Spent			Number of Beds	Rate of Occupancy (%)
	Foreigner	National	Total	Foreigner	National	Total		
2002	126,045	685,280	811,325	180,656	855,835	1,036,491	17,252	16
2008	149,437	720,496	869,933	187,222	882,787	1,070,009	17,482	17
2013	300,120	831,421	1,177,239	308,200	1,036,500	1,344,700	21,427	17
2018	529,836	1,085,787	1,615,623	478,708	1,240,395	1,719,103	27,826	17
2023	749,096	1,260,414	2,009,510	628,602	1,407,844	2,036,447	33,735	17

Table 4: Alternative 2 - Ministry-Licensed Facilities (increase in night spent and occupancies)

Years	Number of Arrivals			Night Spent			Number of Beds	Average Stay Time		Rate of Occupancy (%)
	Foreigner	National	Total	Foreigner	Citizen	Total		Foreigner	Citizen	
2002	65,377	287,185	352,562	90,637	383,079	473,716	4,548	1.6	1.3	29
2008	131,183	423,404	554,587	393,550	846,808	1,240,357	8,496	3	2	40
2013	295,625	665,958	961,582	886,874	1,331,916	2,218,790	15,197	3	2	40
2018	528,184	920,324	1,448,508	1,584,552	1,840,649	3,425,200	23,460	3	2	40
2023	748,190	1,117,474	1,865,664	2,244,570	2,234,948	4,479,518	30,682	3	2	40

Table 5: Alternative 2 - Facilities, Municipality-Licensed (increase in night spent and occupancies)

Years	Number of Arrivals			Night Spent			Number of Beds	Average Stay Time		Rate of Occupancy (%)
	Foreigner	Citizen	Total	Foreigner	Citizen	Total		Foreigner	Citizen	
2002	60,668	398,095	458,763	90,019	472,756	562,775	12,704	1	1	12
2008	18,253	297,092	315,346	54,760	594,184	648,945	4,445	3	2	40
2013	4,496	165,463	215,656	13,487	330,926	344,413	2,359	3	2	40
2018	1,652	165,463	167,115	4,957	330,926	335,883	2,301	3	2	40
2023	906	142,940	143,846	2,719	285,879	288,598	1,977	3	2	40

Table 6: Alternative 2 - Total Facilities, Ministry-Licensed and Municipality-Licensed (increase in night spent and occupancies)

Years	Number of Arrivals			Night Spent			Number of Beds	Average Stay Time		Rate of Occupancy (%)
	Foreigner	Citizen	Total	Foreigner	Citizen	Total		Foreigner	Citizen	
2002	126,045	685,280	811,325	180,656	855,835	1,036,491	17,252	1.06	1.21	16
2008	149,437	720,496	869,933	448,310	1,440,992	1,889,302	12,940	3.00	2.00	40
2013	300,120	831,421	1,177,239	900,361	1,662,841	2,563,202	17,556	3.00	2.00	40
2018	529,836	1,085,787	1,615,623	1,589,509	2,171,574	3,761,083	25,761	3.00	2.00	40
2023	749,096	1,260,414	2,009,510	2,247,289	2,520,827	4,768,116	32,658	3.00	2.00	40

Table 7: Alternative 3 - Ministry-Licensed Facilities (improvement in all operational indicators)

Years	Number of Arrivals			Night Spent			Number of Beds	Average Stay Time		Rate of Occupancy (%)
	Foreigner	Citizen	Total	Foreigner	Citizen	Total		Foreigner	Citizen	
2002	65,377	287,185	352,562	90,637	383,079	473,716	4,548	1.60	1.31	29
2008	131,183	423,404	554,587	229,571	635,106	864,676	6,769	1.75	1.50	35
2013	295,625	665,958	961,582	591,249	1,165,426	1,756,675	12,032	2.00	1.75	40
2018	528,184	920,324	1,448,508	1,320,460	1,840,649	3,161,108	19,246	2.50	2.00	45
2023	748,190	1,117,474	1,865,664	2,244,570	2,514,317	4,758,886	26,076	3.00	2.25	50

Table 8: Alternative 3 - Municipality-Licensed Facilities (improvement in all operational indicators)

Years	Number of Arrivals			Night Spent			Number of Beds	Average Stay Time		Rate of Occupancy (%)
	Foreigner	Citizen	Total	Foreigner	Citizen	Total		Foreigner	Citizen	
2002	60,668	398,095	458,763	90,019	472,756	562,775	12,704	1.06	1.21	12
2008	18,253	297,092	315,346	31,944	371,365	403,309	7,366	1.75	1.25	15
2013	4,496	165,463	215,656	8,991	248,194	257,185	3,915	2.00	1.50	18
2018	1,652	165,463	167,115	3,718	289,560	293,278	3,826	2.25	1.75	21
2023	906	142,940	143,846	2,266	285,879	288,145	3,289	2.50	2.00	24

Table 9: Alternative 3 - Total Facilities, Ministry-Licensed and Municipality-Licensed (improvement in all operational indicators)

Years	Number of Arrivals			Night Spent			Number of Beds	Average Stay Time		Rate of Occupancy (%)
	Foreigner	Citizen	Total	Foreigner	Citizen	Total		Foreigner	Citizen	
2002	126,045	685,280	811,325	180,656	855,835	1,036,491	17,252	1.43	1.25	16
2008	149,437	720,496	869,933	261,514	1,006,471	1,267,985	14,135	1.75	1.40	25
2013	300,120	831,421	1,131,541	600,241	1,413,620	2,013,861	15,947	2.00	1.70	35
2018	529,836	1,085,787	1,615,623	1,324,178	2,130,209	3,454,386	23,072	2.50	1.96	41
2023	749,096	1,260,414	2,009,510	2,246,836	2,800,196	5,047,032	29,365	3.00	2.22	47

## Distribution of Number of Beds by Provinces in the Plan Target Year

In the distribution of predicted number of beds by provinces, both the current situation and the spatial reflections of development strategies envisaged by this study were taken into consideration (see Table: 10).

To these assumptions, the following were added:

- i. In the plan target year, about 75 % of total number of beds will take place in the coastal zone. Settlements in the coast will form starting points for tours and provide accommodation facilities. Comprehensive tours that also include other Black Sea countries will become directed towards the coast section to a large extent. In addition, business travels is also predicted to concentrate in the coast.
- ii. About 7,600 number of beds to take place in inland parts and the south of the region will serve specifically to eco-tourism. Maintenance of a high number of number of beds in inland parts will mean an increased pressure on and risking of sensitive natural assets.
- iii. The share of each province in the guest bed stocks in 2023 will be dependent on the sectoral performance in the period 1996-2002 as well as developable resources owned.

Table 10: Distribution of Number of Beds in Total Ministry-Licensed and Municipality-Licensed Facilities in 2023 by Provinces

Provinces	Total Number of Beds	5 * and 4 * Hotels	3 * Hotels	2* and 1 * Hotels	Other (Priv. cert., municipal inn, etc)
Ordu	4,111	411	1,439	1,439	822
Giresun	3,818	382	1,336	1,336	764
Trabzon	13,214	1,321	4,625	4,625	2,643
Gümüşhane	881	88	308	308	176
Rize	3,818	382	1,336	1,336	764
Artvin	3,524	352	1,233	1,233	705
Regional Total	29,365	2,937	10,278	10,278	5,873



## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX H: FINANCIAL ASPECT OF TOURISM SECTOR DEVELOPMENT AND INVESTMENT**

## **FINANCIAL ASPECT OF TOURISM SECTOR DEVELOPMENT AND INVESTMENT**

### **Investments for Tourism Sector Development**

The tourism sector investment forecasts under DOKAP and their realization levels indicate how difficult to make available the funds allocated to the tourism sector is, particularly for public investments.

Therefore, the tourism sector development will be achieved through private sector investments, to a great extent. In addition to investments made by individual entrepreneurs, organizations formed by the sector partners must also make investments.

The types of investments envisaged to be made in the coming period, including the form of fund raising and investors are shown below.

- i. The public sector will extend guiding investments by providing infrastructure and site management plans to the sector. The public sector will also assume duties on and make investments in the area of publicity.
- ii. Organizations of the sector partners will assume the role of an investor in providing and operating infrastructure facilities, in publicity and marketing and in producing site management plans.
- iii. The private sector will make investments in the sector amenities, facilities and operation and in publicity and marketing areas.
- iv. Operating costs of infrastructure and amenities will be collected from users basing on the "users pay" principle.

### **Public Sector's Investment Areas and Investment Figures**

If the sector will show development in the existing built-up sectors in urban and rural areas, it will use the existing infrastructure. Excluding waste water treatment and healthy solid waste disposal infrastructures particularly in the urban area, other infrastructures have been largely completed in Turkey and in the region. The sector is lucky from this point of view.

To a large extent, investments will be made in plateaus located in inland sections of the region, which are being seasonally used and have not seen the beginning of tourism development yet and in other similar areas having a high potential. These investments will largely involve the construction of roads, infrastructures and the installation of amenities.

- i. Investment figures for the transport system improvement and new road construction were calculated for areas proposed to be developed. These investments are envisaged to be realized by the public sector.
- ii. For investments to provide infrastructure in the site, a model was developed to predict investments. These investments are envisaged to be realized by the public sector and partly by organizations of the sector partners and the private sector.

Accordingly, 6,000 beds, which constitute 20 % of the 30,000 beds estimated to be available in the region, will take place in inland areas to be newly opened to tourism, which will be built up with a density of 25 beds/ha. Basing on the costs incurred on previously accomplished projects as revised after the tough conditions prevalent in the East Black Sea Region, a cost module was prepared. According to this cost module, the average cost of developing a network infrastructure in unit area (1 ha) will be 92,000 US\$/ha and the average total site development cost will be 124,000 US\$/ha.

According to this module, the total cost of developing an infrastructured site for 6,000 beds is 29,808 Million US\$. These investments falling upon the public sector will have to be made particularly through the General Directorate for Rural Services and local administrations.

Table 1: Site Development Costs in Territories to Be Newly Opened to Tourism (US\$)

Density	25 beds/ha.
Total Guest Beds (ea.)	6,000
Total Area To Be Developed (ha.)	240
Network Infrastructure Development Cost/Unit Area (US\$/ha)	92,000
Solid Waste Collection and Disposal Cost (US\$/ha)	18,400
Cost of Amenities (US\$/ha)	13,800
Total Development Cost per Unit Area (US\$/ha)	124,200
Total Cost (US\$)	29,808,000

- iii. In-region new road construction and road improvement investments will be another obligation to be assumed by the public sector. Using documents and maps obtained from provincial directorates of Rural Services, road conditions of areas having high tourism potential were investigated and the amounts of investments required for new road construction and road improvement were calculated. Cost assumptions were 133,562 US\$/km for new road construction and varied from 46,223 US\$/km to 97,603 US\$/km for road improvement of stabilized roads and earth roads. According to the calculations, 338 km of roads providing access to high-potential plateaus and tourism centers must be improved or constructed. The total investment required for these works is approximately 18 million US\$ per year.

Table 2: In-Region New Road Construction and Road Improvement Costs for the Planned Period

Province of Ordu	Length (km.)	Total Cost (US\$.)
Road Improvement (Stabilized-Asphalt)		
Çambaşı TC - Mesudiye	22	1,017,123
Keyfalan TC – Mesudiye	7	323,630
Çambaşı - Yeşilce - Topçam TC	4	184,932
Subtotal for Province of Ordu	33	1,525,685
Province of Giresun	Length (km.)	Total Cost (US\$.)
Road Improvement (Stabilized-Asphalt)		
Bektaş TC – Giresun	22	1,017,123
Kulakkaya TC – Giresun	4	184,932
Bektaş TC – Bulancak	27	1,248,288
Kümbet TC - Çakrak - Yağlıdere (Stabilized)	15	1,464,041
Subtotal	68	3,914,384
New Road Construction		
Kulakkaya TC – Dereli	20	2,671,233
Subtotal for Province of Giresun	20	2,671,233
Total	88	6,585,616
Province of Trabzon	Length (km.)	Total Cost (US\$.)
Road Improvement (Stabilized-Asphalt)		
Akçaabat - Hıdırnebi - Kuruçam Plateaus	16	739,726
Akçaabat - Karadağ TC	13	601,027
Maçka - Şolma TC	22	1,017,123
Tonya - Erikbeli TC	14	647,260
Çaykara - Sultanmurat Plateau	17	785,959
Subtotal for Province of Trabzon	82	3,791,096
Province of Gümüşhane	Length (km.)	Total Cost (US\$.)
Road Improvement (Stabilized-Asphalt)		
Sarıçiçek Village – Gümüşhane	8	369,863
Artabel Gölleri – Torul	15	693,493
Santa Ruins – Gümüşhane	22	1,017,123
Subtotal for Province of Gümüşhane	45	2,080,479
Province of Rize	Length (km.)	Total Cost (US\$.)
Road Improvement (Stabilized-Asphalt)		
Ovit Plateau Cluster- Anzer TC - İkizdere	20	924,658
Subtotal for Province of Rize	20	924,658
Province of Artvin	Length (km.)	Total Cost (US\$.)
Road Improvement (Stabilized-Asphalt)		
Yaylalar Village - Altıparmak – Yusufeli	26	1,202,055
Sahara Karagöller National Park - Şavşat	39	1,803,082
Hatilla Valley National Park – Artvin	5	231,164
Subtotal for Province of Artvin	70	3,236,301
Regional Total – Road Improvement	318	15,472,603
Regional Total – New Road Construction	20	2,671,233
Overall Total	338	18,143,836

- iv. The preparation of “Site Management Plans” for areas having a high development potential is also envisaged to be assumed by the public sector, organizations of the sector partners and the private sector. The sum of this investment was calculated to be

1.6 Million US\$, envisaging the preparation of a model site management plan for each province.

### Private Sector's Investment Areas and Investment Figures

In the planned period, the private sector will assume the construction and management of accommodation facilities. In addition, the private sector will accomplish the construction of site infrastructure for such facilities.

In addition to the existing Ministry-certified guest beds in the region, it is predicted that approximately 25.000 (forecasting result: 24.817) guest beds more will become eligible for certification by the Ministry in the planned period (Table: 3).

Table 3: Forecasts of Additional Guest Beds for the Planned Period

Provinces	Total Additional Guest Beds	5 * and 4 * Hotels	3 * Hotels	2 * and 1 * Hotels	Other Facilities (Special cert., plateau board. houses, other.)	Total Guest Beds
Ordu	3,477	411	1,439	1,439	822	4,111
Giresun	3,272	382	1,126	1,000	764	3,818
Trabzon	11,092	754	3,595	4,100	2,643	13,214
Gümüşhane	827	88	308	254	176	881
Rize	3,281	216	1,336	965	764	3,818
Artvin	2,869	352	1,233	578	705	3,524
Regional Total	24,817	2,204	9,038	8,337	5,873	29,366

Bed costs were also estimated by using a cost module. The assumptions of this module are explained in the following Table: 4.

Table 4: Assumed Bed Cost Estimates for the Planned Period (US\$)

Investment Costs	Cost per m2			Construction Cost per Bed (CCpB)	Furnishing Cost (10% of CCpB)	Infrastructure and Landscape Cost (15% of CCpB)	Total Cost per Bed
	Public Works Ministry Unit Prices (for 2003)	Market Prices (for 2003)	Average Area Per Bed		10%	15%	
5* Hotels	\$610	\$775	60m2	\$46,500	\$4,650	\$6,975	\$58,125
4* Hotels	\$460	\$620	45m2	\$27,900	\$2,790	\$4,185	\$34,875
3* Hotels	\$295	\$450	30m2	\$13,500	\$1,350	\$2,025	\$16,875
2* Hotels	\$195	\$225	15m2	\$3,375	\$338	\$506	\$4,219
1* Hotels	\$100	\$150	12m2	\$1,800	\$180	\$270	\$2,250
Others	-	\$175	12m2	\$2,100	\$210	\$315	\$2,625

It is estimated that the private sector will extend a total investment of 297,372,894 US\$ in accommodation facilities in the planned period. A predicted distribution of these investments by provinces is shown in the following Table 38. With these investments, approximately 30,000 guest beds will be serving to the tourism sector at the end of the planned period, as distributed above, offering accommodations for about 2 millions of national and foreign visitors.

Table 5: Costs of Additional Beds for the Planned Period (US\$)

Provinces	Total Additional Guest Beds	5 * and 4 * Hotels	3 * Hotels	2 * and 1 * Hotels	Other Facilities (Special cert., plateau board. houses, other.)	Total Cost
Ordu	3,477	\$19,116,887	\$24,281,530	\$4,653,960	\$2,158,358	\$50,210,734
Giresun	3,272	\$17,751,395	\$19,003,385	\$3,234,784	\$2,004,190	\$41,993,753
Trabzon	11,092	\$35,081,636	\$60,666,524	\$13,261,110	\$6,937,580	\$115,946,849
Gümüşhane	827	\$4,096,476	\$5,203,185	\$822,621	\$462,505	\$10,584,787
Rize	3,281	\$10,032,395	\$22,547,135	\$3,121,581	\$2,004,190	\$37,705,300
Artvin	2,869	\$16,385,903	\$20,812,740	\$1,870,593	\$1,850,021	\$40,919,257
Regional Total	24,817	\$102,469,341	\$152,520,403	\$26,965,780	\$15,417,369	\$297,372,894

### Total Amount of Tourism Investments by Public Sector & Private Sector

In the planned period, the public sector must supply an investment of about 50 Million US\$ for infrastructured site development, new road construction and road construction that it must undertake particularly in inland plateaus and in valleys located south of the region and for the preparation of associated site management plans. Investments to be made for developments in urban areas are not included in this figure. Investments made in this sector will be serving to not only the tourism sector but also the entire economy.

On the other hand, the total amount of investments that must be made by the private sector for accommodation facilities is around 300 Million US\$.

The total investment to be extended for the development of tourism and eco-tourism thus rises to about 400 Million US\$. This figure means an average investment of 19 Million US\$ per year.

### Estimated Tourism Revenues

It is predicted that approximately 2 millions national and foreign visitors will be coming to the region as of the end of the planned period. It is known that 7,630,000 foreign tourists visiting Turkey in 2000 spent 764,3 US\$/person in average. It is also predicted that, as of the end of the planned period, approximately 2 million tourists/year will have been accommodated in the East Black Sea Region. If no change occurs to expenditure patterns, the annual tourism income obtained by the region will rise to around 1.53 Million US\$ per year.

DOKAP predicts the regional population to be approximately 3,400,000 in 2020. However, the year 2000 census counts turned out to be greater than the plan predictions. Estimates made with the rates of growth in 1990-2000 find out the regional population in 2020 as 3,800,000 persons.

With different assumptions of population, the income per person in the region in 2020 varies between about 5,150 to 5,370 US\$/person. Basing on these assumptions, the average income/person from the tourism sector should be expected to rise to 400-450 US\$/person.

## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX I: SHORT TERM IMPROVEMENT MEASURES**

## **SHORT TERM IMPROVEMENT MEASURES**

Short term (2003-2008) strategies should include the preparatory studies and alleviation of existing problems and constraints.

### **Concentration of Development at Locations That Have The Highest Potential for Development and Utilization of The Spillover Effects**

It should not be expected that the total potential of the Region can be mobilized simultaneously. Otherwise, such an attempt would result in misuse of limited resources, extending the programmed periods for the completion of investments and unproductively.

Through a selective approach, locations and tourism activities that have the highest potential for development and that show maximum positive spillover effects should be selected and initial development should start in these areas and activities.

The Region has the infrastructure and the accumulation for the realization of this strategy. All provinces have areas that can be an example for their surroundings both at the coastal and inner parts.

Ünye, Fatsa, Perşembe settlements within the province of Ordu are locations where tourism activities are observed and where tourism facilities exist. The axis towards Trabzon is one of the few areas where tourism is relatively developed. In inner parts, the plateau of Çambaşı is a well known location which can be attractive to investors. During the Plan Implementation Stage, giving priority for development to these areas that show the highest potential will ensure positive spillover effects on other potential areas.

The city of Giresun is itself a potential for tourism development. Ministry licensed facilities exist in the city and it has the potential to send daily or short term visitors to inner parts. The plateaus of Kümbet and Kulakkaya in the inner parts carry importance for the province of Giresun. These are the known and partially equipped plateaus. Developments in these areas will be the initiators and examples as in the province of Ordu.

Trabzon, with its number of tourism facilities and 50 % share of total nights spent, is the most developed province in terms of tourism sector as well as the other sectors. The city is integrated with the settlements of Beşikdüzü, Vakfıkebir, Çarşıbaşı, Yomra, Arsin, Araklı, Sürmene and Of located at proximity. The accommodation establishments also exist in these settlements. Today, this zone is the center along the coast for regional tourism.

In the inner parts, Altındere (Sumela -Maçka) and Uzungöl (Çaykara) are the most well known and developed centers. In addition to these, a “plateau settlement” has been established by the public sector in Hıdırnebi plateau. In short period, tourism would be developed in these regions by improving the physical stock, increasing the service quality and developing an appropriate management plan.

### **Increasing the Levels of Occupancy in the Accommodation Establishments**

It is important that the existing capacity is being utilized at maximum levels. The data obtained from the establishments as well as the issues voiced at the stakeholders meetings indicate that the existing capacities are under utilized. For example, the average occupancy rate of the tourism facilities in the Region in general is only 29 %for the year 2002 which is well below the national average of 49 %. This issue is critical because successful measures towards increasing the occupancy levels will ensure development without additional investment in tourism accommodation facilities.



## **Improving the Turism Facilities**

Coupled with above, improving the physical conditions and service quality levels of existing facilities during the first 5 years of the plan implementation stage will be another strategic measure. It has been observed that, in the last 6 years, the number of municipal licensed facilities are decreasing whereas the number of ministry licensed facilities is increasing. The total number of facilities are decreasing to the higher pace of the decrease in the number of municipal licensed facilities. It is recommended that integrated with the policies and measures to increase the physical and service quality of the existing ministry licensed facilities, policies and measures should be incorporated to bring the municipal licensed facilities to the physical and service quality levels of “improved” ministry licensed facilities and enable them to receive license from the Ministry. Such a transformation will ensure the sector development to gain pace with low levels of investment during the first five years of the plan implementation stage.

## **Improvement and Development of Infrastructural Services and Transportation System**

Difficulties in accessibility and insufficient infrastructure present themselves as the most important problem. Partly in response to this and against all opposition regarding the route and the concerns for the environment, construction of the Black Sea Divided Highway is underway. This road will certainly increase the level of accessibility in the Region, especially between coastal settlements and with centers outside the Region. Another development is the increase in the physical standards of the north-south main axis between Trabzon, Gümüşhane, Bayburt and Erzurum. The road that connects Hopa, Artvin and Erzurum is undergoing changes in the route due to dam constructions and the new road will definitely be of much higher standard.

Provincial and rural roads also suffer from many problems. Improving the standards of these roads and ensuring connections to higher altitude areas that have high tourism development potentials, is also of strategic importance. In this respect, Ünye-Akkuş-Niksar (Tokat), Fatsa-Kumru, Fatsa-Korgan, Fatsa-Kabataş-Aybastı-Başçiftlik-Reşadiye Tokat), Ordu-Ulubey-Gölköy-Mesudiye-Koyulhisar (Sivas) roads in the province of Ordu; Giresun-Dereli-Şebinkarahisar-Alucra, Şebinkarahisar-Suşehri(Sivas), Tirebolu-Kürtün-Torul roads in the province of Giresun; Beşikdüzü-Şalpazarı-Tonya, Sürmene-Köprübaşı- Aydın-tepe-Bayburt, Of-Dernekpazarı,Çaykara-Uzungöl, Çaykara-Bayburt roads in the province of Trabzon; İyidere-Kalkandere-İkizdere-İspir (Erzurum), Gündoğdu-Güneysu, Çayeli-Kaptanpaşa, Pazar-Hemşin, Ardeşen-Çamlıhemşin-Ayder roads in the province of Rize and Borçka-Muratlı, Borçka-Camili, Artvin-Şavşat-Ardahan, Şavşat-Meydancık, Şavşat-Veliköy, Ardanuç-Geçitli-Bülbülhan-Yalnızçam-Ardahan roads in the province of Artvin are recommended to be improved and maintained properly. Most of these roads are hard paved roads but are inadequately maintained. The recommended road improvement program will not directly have positive effects on tourism development but will also positively influence other sectors in the Region.

The potential areas for development, especially the plateaus are either located on these routes or are very nearby. The problem of regional accessibility will be mostly alleviated with road improvements and securing of accessibility to these potential areas. The details for this recommendation will be discussed in the section on “Detailed Recommendations With Regard To Development Centers and Axes.”

Another important issue is sea transport. It is recommended that the first five year program of the plan implementation stage should include the reemergence of ferryboat cruise transport between İstanbul and ports in the Region as well as initiating cruise tours between the ports of the Region and ports of relatively more developed regions along the Black Sea coast such as Yalta, Sochi and Batum.

## **Development of the Site Management Concept and Commencement of Initial Management Projects**

The importance and scarcity of natural and cultural riches that will provide the resources for the development of tourism necessitate the utilization of proper management plans. There are examples of such plans in areas of environmental and archeological importance within the country. Of these, two important ones are the management plans in Belek (Antalya) and Patara (Muğla). Similarly, the General Directorate of Natural Conservation and National Parks are preparing such management plans for the zones of protection and conservation.

It is recommended that the short term management plans should be prepared by the public sector. Middle and long term management plans on the other hand, should be prepared and implemented by the private sector partners of the tourism sector as defined by the institutional framework recommended below. The implementation for both short and long terms shall be conducted by the local tourism organizations in view of the economic development of the Region. The income from the facilities that will be operated or leased by the local organizations can be utilized for implementation and/or public sector support could be obtained.

The implementation of management plans are expected to be positive examples and should also have spillover effects.

During the short term, management plans are proposed for Çambaşı plateau for the province of Ordu, Koçkayası plateau for the province of Giresun, Altındere National Park and Uzungöl for the province of Trabzon, Zigana Ski Center for the province of Gümüşhane, Ayder plateau for the province of Rize and Yusufeli Kızılkaya for the province of Artvin. These proposed areas should be reviewed and final selection for priorities in implementation should be made by the Ministry of Culture and Tourism and local project partners.

It is recommended that the management plants should cover the below listed items:

- i. Model for the organization and institutionalization in the area,
- ii. Determination of the actors that will assume responsibilities and clarifying their roles,
- iii. Determination of the areas of cooperation between the public and private sector and implementing these partnerships.
- iv. Scientific research of the area and promotional and PR activities,
- v. Determination of the areas of investment and the scale of investment,
- vi. Programming the investments,
- vii. Determination of the financial resources,
- viii. Completion of the physical planning and landscaping design,
- ix. Implementing the physical layout with adequate signs, walkways, lightning and points of scenic views,
- x. Completion of infrastructure projects and operation of the infrastructure,
- xi. Model for services and support facilities and operation of these facilities,
- xii. Model for monitoring and guidance.

For each management plan, the above list may be different according to the characteristics of the locality.

## **Commencement of Institutionalization**

A critical and necessary precondition for the Region to develop in tourism is proper institutionalization. In counties with developed tourism sector, sector is structures and directed by the institutions that are established jointly by the partners in the sector.

The level of institutionalization is not adequate in the Region. In all the stakeholders meetings held in the Region, the common view was that the necessary measures that should be taken for the development of the sector was in the domain of the public sector.

The role of the public sector in the development of tourism can be summarized as setting down the general policies, guidance and supervision. Besides these, the public sector in the Region has assumed the responsibilities for the provision, operation and maintenance of infrastructure and partial promotional activities.

The facility provision and service is within the domain of the private sector. Such areas as PR and promotional activities, marketing, auto-control, design of local tourism development policies and operation of some of the infrastructural services should be assumed by the institutions jointly established by the sector partners.

It is observed that the institutional aspect of the division of roles and responsibilities as outlined above is virtually non-existent in the Region. An example to this is the uncertainty with respect to the provision and operation of infrastructure in areas other than relatively developed zones such as Ayder and Uzungöl. In most areas these services do not exist. In very few areas these services are insufficiently provided by the Municipalities or by the “muhtars”.

On the other hand, levels institutionalization in existing tourism areas is also insufficient. Local administrations are expected to provide these services.

There is no institutionalization for PR, promotion, establishing relationships with other areas and devising policies for appropriate development.

This situation is a natural result of the existing scale and size of the sector. Establishing proper institutions should be a central strategy for the short term. In this respect, possible institutionalization, with examples from other places in the country, are given below:

- i. It is possible to bring together the owners and operators of tourism facilities, representatives of local trade and handcrafts and local administration under a local association with the goal of developing the sector. An example to this is Sarıgerme Environmental Training Association (SARÇED) in the district of Ortaca in the province of Muğla. The Association deals with many issues regarding the training in environmental protection, tourism and urban development. The main source of income for the Association the beach and car parking.
- ii. Another model for institutionalization is establishment of cooperatives. Such cooperatives can be established by the owners or operators of small scale facilities. An example to this is the tourism cooperative in the district of Safranbolu in Karabük. This cooperative is marketing the facilities and its main source of income is the share it gets from these facilities' incomes for its marketing activities.
- iii. More complex and structured institutionalization will be required for those places where tourism is relatively more developed and dispersed into wider areas. Those local authorities that jointly utilize the natural and cultural resources or sharing the same water resources or discharging wastes into the same locations can form unions for the provision and operation of infrastructure. Such unions exist widely in the country. Examples to these is the South Antalya Tourism and Infrastructure Union (GATAB) in Antalya, Köyceğiz/Dalyan Union of Local Authorities for Environmental Protection in Muğla, Marmaris, Armutalan, and İçmeler Union of Local Authorities (MAR-İÇ BİR) in Muğla and Çeşme/Alaçatı Union of Local Authorities (ÇAL-BİR) in İzmir.

This model of establishing unions for joint objectives is also common in other countries. An example to this is the Usedom Union of Tourism in north of Germany. This union is active in PR, promotion and operation of thermal (baths) and beach facilities.

- iv. Another model is the establishment of commercial partnerships that also includes public-private partnerships. Some of the unions stated above have established partnerships with the private sector in the provision and operation of infrastructural services and in tourism development. GATAB, for example, have established the Tourism and Infrastructure Inc. (ALTAŞ) in partnership with the private sector. According to its articles of association, the company can also establish travel agencies or foreign exchange offices besides its main activity in infrastructure provision and operation. Similarly, The Union of Köyceğiz/Dalyan can operate as investors or operators in the tourism sector through Environment and Tourism Inc. Established jointly with the owners of the tourism facilities.

Establishment of similar organizations and institutions geared towards the development of tourism is a necessary precondition in the Region. Associations or cooperatives are easier to be established for such areas as Ayder, Uzungöl and Yusufeli. Through such an institutionalization adequate financial resources can be secured for the implementation of area management plans.

On the other hand, it is highly recommended that those settlements that are in close proximity of each other and that share the same resources (e.g. Fatsa-Ünye, Perşembe-Ordu, Akçaabat-Trabzon) establish unions. These unions besides provision and operation of infrastructure can also be active in training in environmental issues and in tourism.

### **An Institutionalization Opportunity– Development Agency**

The most significant opportunity for development of the sector shall be realization of the development agencies” that have been proposed by State Planning Organization.

A series of meetings realized in the region have revealed that the related persons of the sector are not optimistic about improvement of the level of institutionalization and organization. However, one of the basic projections of DOKAP related with tourism is the “tourism partnership program” and establishment of a tourism promotion council in order to achieve said objective. The issues stipulated above are not corresponding with one another.

There is inefficiency in terms of organization in the region whereas tourism is a sector which requires superior level of tourism organization and institutionalization.

It is clear that the solution has a new regional administrative approach and structure which integrates central and local governments along with the civil initiative. Thus, the Development Agency Model is probably considered as the only possibility for sectorial ownership in the region.

## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX J: MIDDLE AND LONG TERM MEASURES**

## **MIDDLE AND LONG TERM MEASURES**

Establishment of new facilities in areas where infrastructure problems are alleviated, increasing the capacities of existing facilities and sustainable development of the sector within its institutionalized framework are foreseen for middle and long term (2009-2023).

### **Completion of the Infrastructure and Increase in the Number of Facilities and Support Units**

During the middle and long term, the opportunities for accommodation will increase in all areas that have high potential for development. Facilities will be in accordance with traditional local fabric and architecture in both coastal and interior zones. In the coastal urban settlements and their environs relatively large scale facilities appropriately supported by other facilities and in conformity with local civilian architecture are recommended. In the interior zones, relatively low capacity, low density buildings that utilize wooden construction materials in conformity with the local civilian architecture are recommended.

### **Integrating the Coastal and Interior Areas and Determination of the Development Axes**

It is expected that the sector will be geographically integrated in the long term. The ties between the coastal areas and interior areas will be strengthened. The visitors to the coastal areas are expected to visit the interior areas also. The visits to the interior areas are expected to be daily trips and well as one night stays. In this respect, the visitors to the Region are expected to utilize heavily the north – south axes that will have higher standards by that time. Those areas near Akkuş-Niksar highway and Mesudiye and Aybastı plateaus in the province of Ordu; Develi-Şebinkarahisar axis and the plateaus in its vicinity in the province of Giresun; Trabzon ilinde Gümüşhane-Erzurum axis and its vicinity, Tonya, Akçaabat, Sürmene and Of plateaus in the province of Trabzon; Çamlıhemşin and Hemşin plateaus, Mount Ovit plateaus on İkizdere –İspir axis and slopes of Mount Kaçkar in the province of Rize; Artvin and Şavşat on Hopa-Borçka-Artvin-Şavşat axis in the province of Artvin are expected to attract increasing number of visitors and these areas are likely to form the axes of development. In Gümüşhane which is an interior province, Tirebolu-Kürtün-Torul axis and areas in close proximity to the famous “Spider Forest” will show similar pace of development together with Gümüşhane province center.

The details for these development axes are provided in the Development Plan Section of the Report.

### **Differentiation of Tourism Products Along the Axes and Points of Development**

Another important middle and long term strategy is product differentiation in the tourism sector. This strategy is to be applied not only through the utilization of the potentials in the Region but also through the utilization of the potentials in the provinces neighboring the Region.

In this period which will witness the maturezation of the tourism sector in the Region, other sub sectors such as nature tourism, adventure sports and botanics are also expected to display important leaps in development. Domestic visitors are expected to participate in these activities as well as foreign tourist. Provision of adequate facilities coupled with effective promotion and marketing will enable the realization of these activities.

Another expected development in this period is the increase in the activities related with the sea. In this respect, the beaches located in the Samsun provincial border-Çamlık (Ünye-Ordu), Bulancak (Giresun) and Kemalpaşa (Hopa-Artvin) zones will have more visitors and more facilities.

Another expected development in the coastal zone is the introduction of yacht tourism. The capacities and service levels in the existing ports and wharfs are expected to be improved. It is recommended that necessary physical layouts in these areas should be implemented.

In the middle and long term, the utilization of the potentials in neighboring provinces should be realized and joint tours are to be organized for Eastern Black Sea and Eastern Anatolia Regions. When the opportunities regarding winter sports and culture tourism are accounted, Eastern Anatolia emerges as a important potential. In this respect, Palandöken (Erzurum), Mount Kop (Bayburt), Sakaltutan (Erzincan) and Sarıkamış (Kars) ski centers have the necessary technical facilities and some have accomodation facilities. Yalnızçam (Ardahan) sji center which is not yet developed also portrays a high potential for development.

Cultural inventory of the Eastern Anatolia Region is also an important opportunity. The ruins of Ani and the Castle of Kars (Kars); Dual Minaret, protected emplacement (Tabya), Small mosques (Erzurum), Castle of Ardahan and ve ruins near Lake Çıldır ar (Ardahan) are already within the tour programs of present day tours. Utilization of these opportunities together with the inventory of the Region will make the tours more attractive as well as increasing the potentials in the Region.

Utilization of the potentials that exist in the countries located on the coast of the Black Sea and introduction of cruise liners is also an opportunity to be exploited. Even though the ex-Soviet countries still portray major economic difficulties, they have important capabilities and assets in tourism. Some of the tourism areas of these countries have been marketed in Eastern Europe. It is possible to market the Region together with Ukraine, Russia and Georgia through international tour operators. Eastern Black Sea ports can be incorporated into the programs for visiting Odessa, Sivastapol, Simperafol, Yalta, Sochi and Batum and cruise liners can visit these centers. In larger scale Black Sea tours Regional ports can be visited together with such centers as Varna and Burgaz in Romania and Bulgaria.

Georgia and Russia need special attention interms of international tourism. By utilizing the opportunities to be provided by the Black Sea Divided Highway, tourists can be attracted through Batum Airport and from the coastal zones in these countries. This opportunity will present itself as a major one in the development of international tourism in the Region and Sarp border gate is expected to be a major gate for tourism.

### **Ensuring the Sustainability of Development**

Securing the continuity and sustainability of development is one of the major aspects to be stressed in the long term. One dimension of sustainability is the protection of the natural and cultural resources. Another dimension is the continuity of high quality service levels. Necessary measures are needed to be taken for the protection of the natural and cultural environment and for the provision of adequate infrastructural services during the period within which the demand for tourism will increase. For quality services to be supplied, increase in institutional capacities, training of human resources and increase in the support services provided are required.

### **Completion of Institutionalization and Sustainability**

It is expected that during this period, the process of institutionalization in the sector is completed and is sustainable. Those associations and/or cooperatives established in the short term should transform themselves into higher echelon organizations. Such higher organizations can be based on the province level or on areas that portray geographical integration. It should be expected that these organizations are to be involved in promotional, PR, marketing and travel tour operations and to establish commercial partnerships.

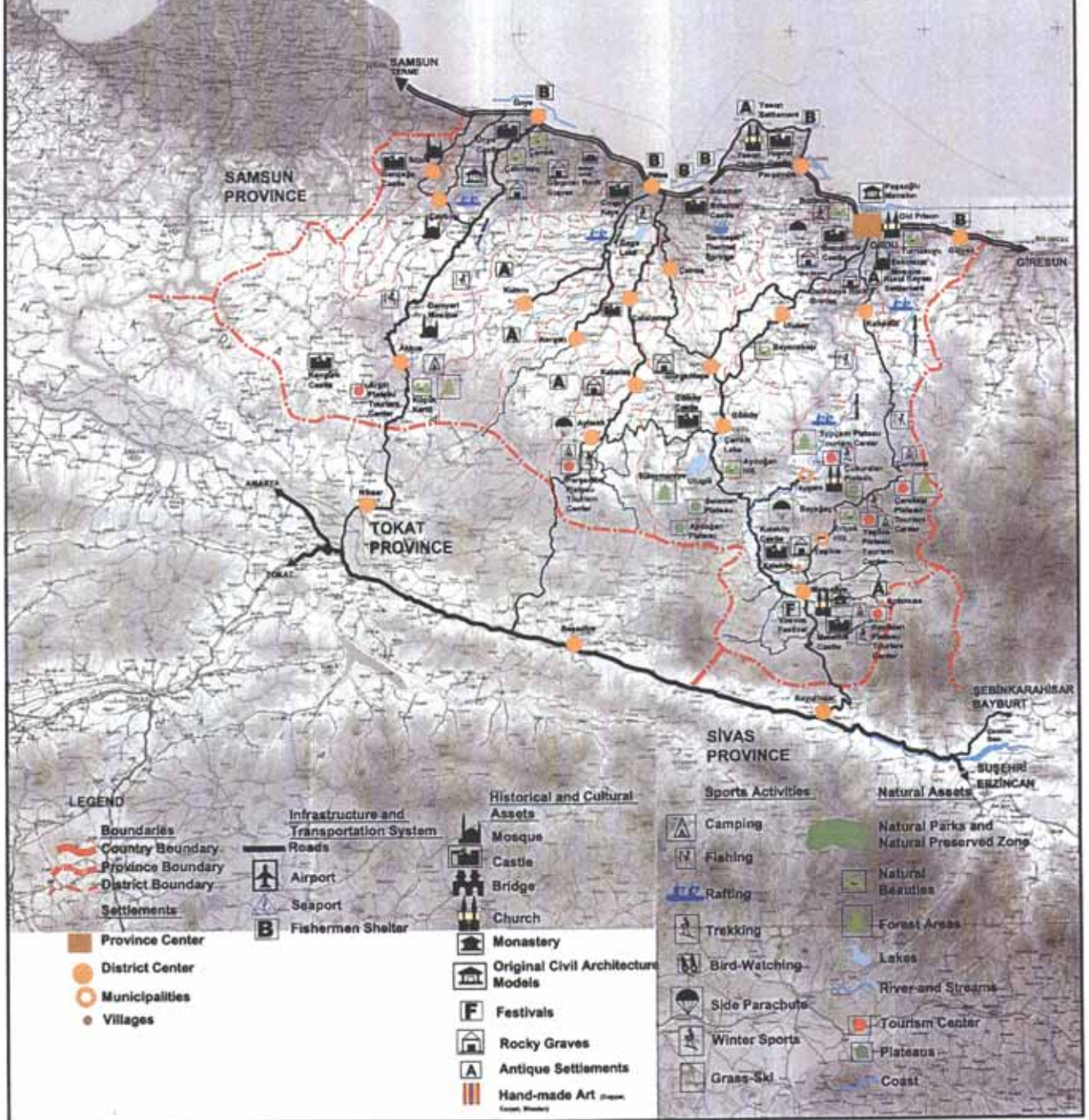
## **Eastern Black Sea Region Tourism Development Study**

# **APPENDIX K: TOURISM RESOURCE MAPS**



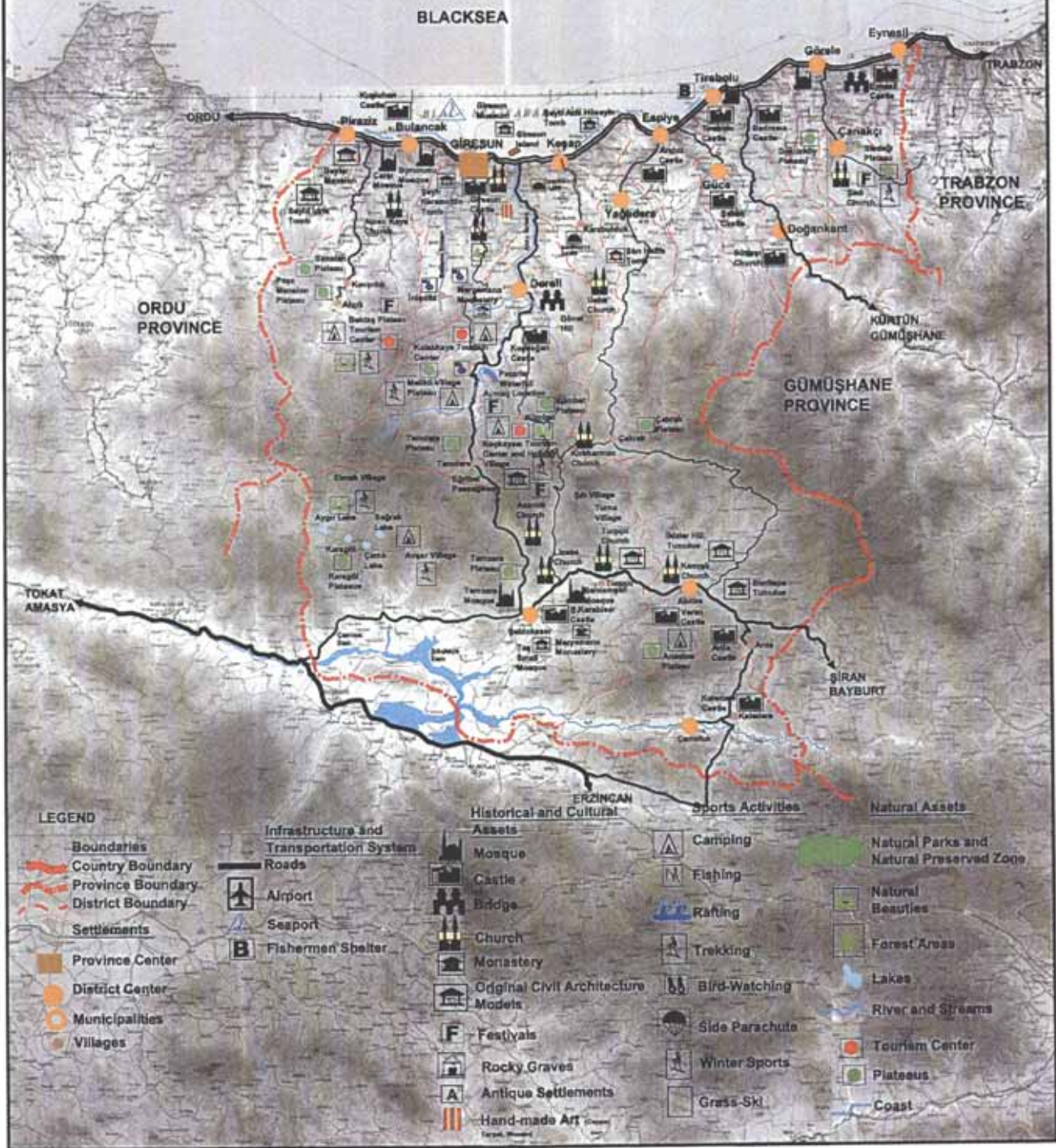
**EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY**

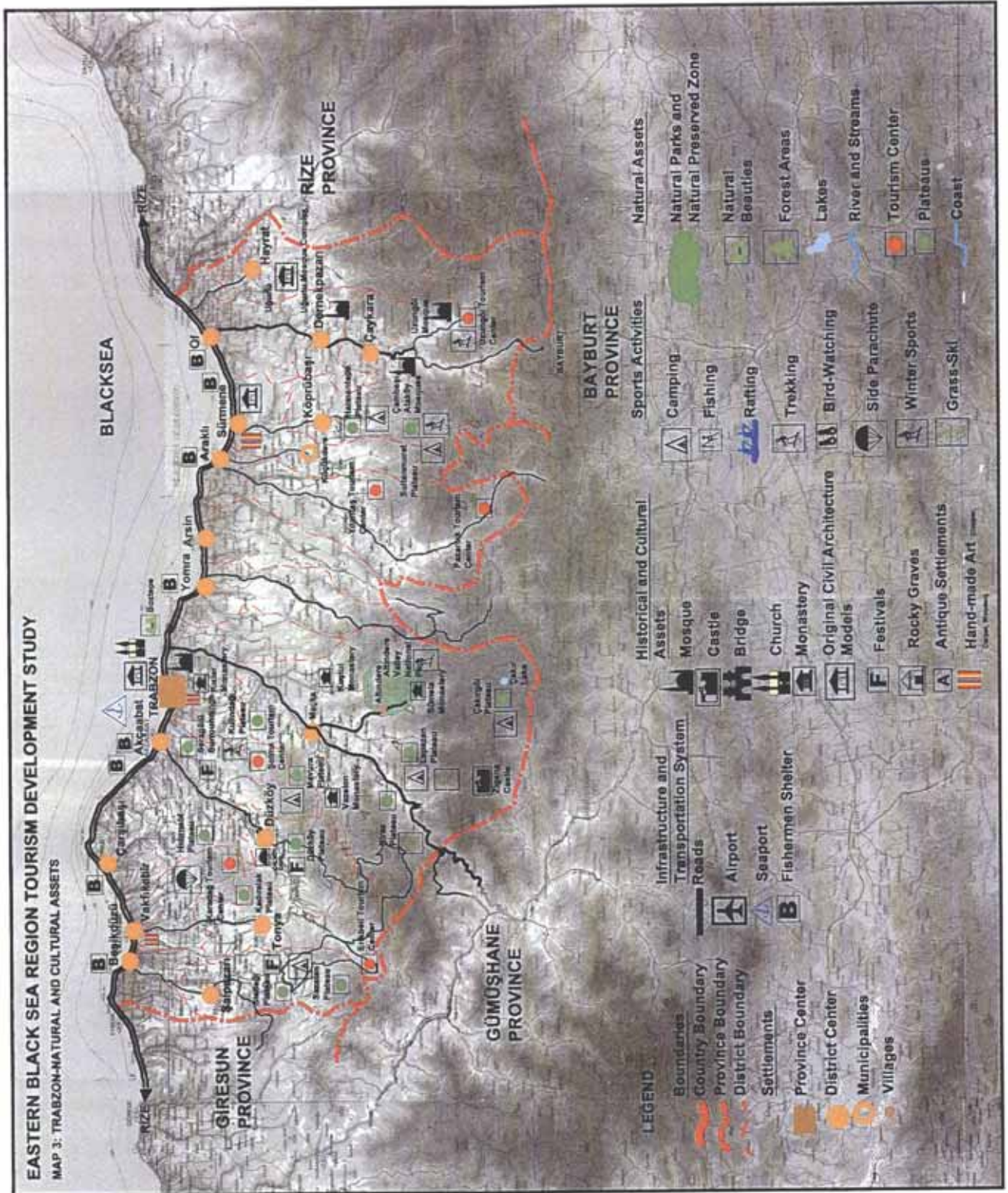
MAP 1: ORDU-NATURAL AND CULTURAL ASSETS

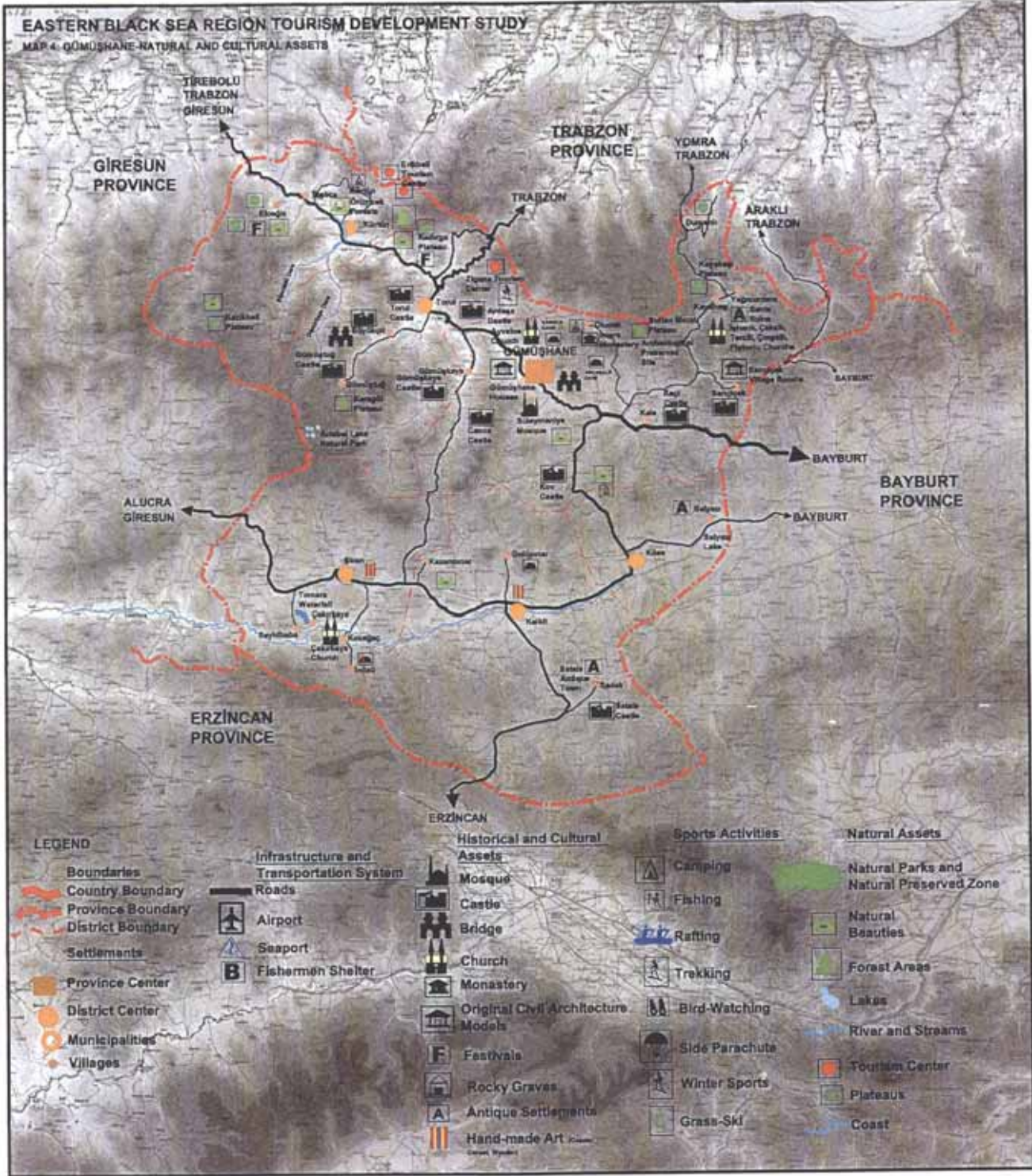


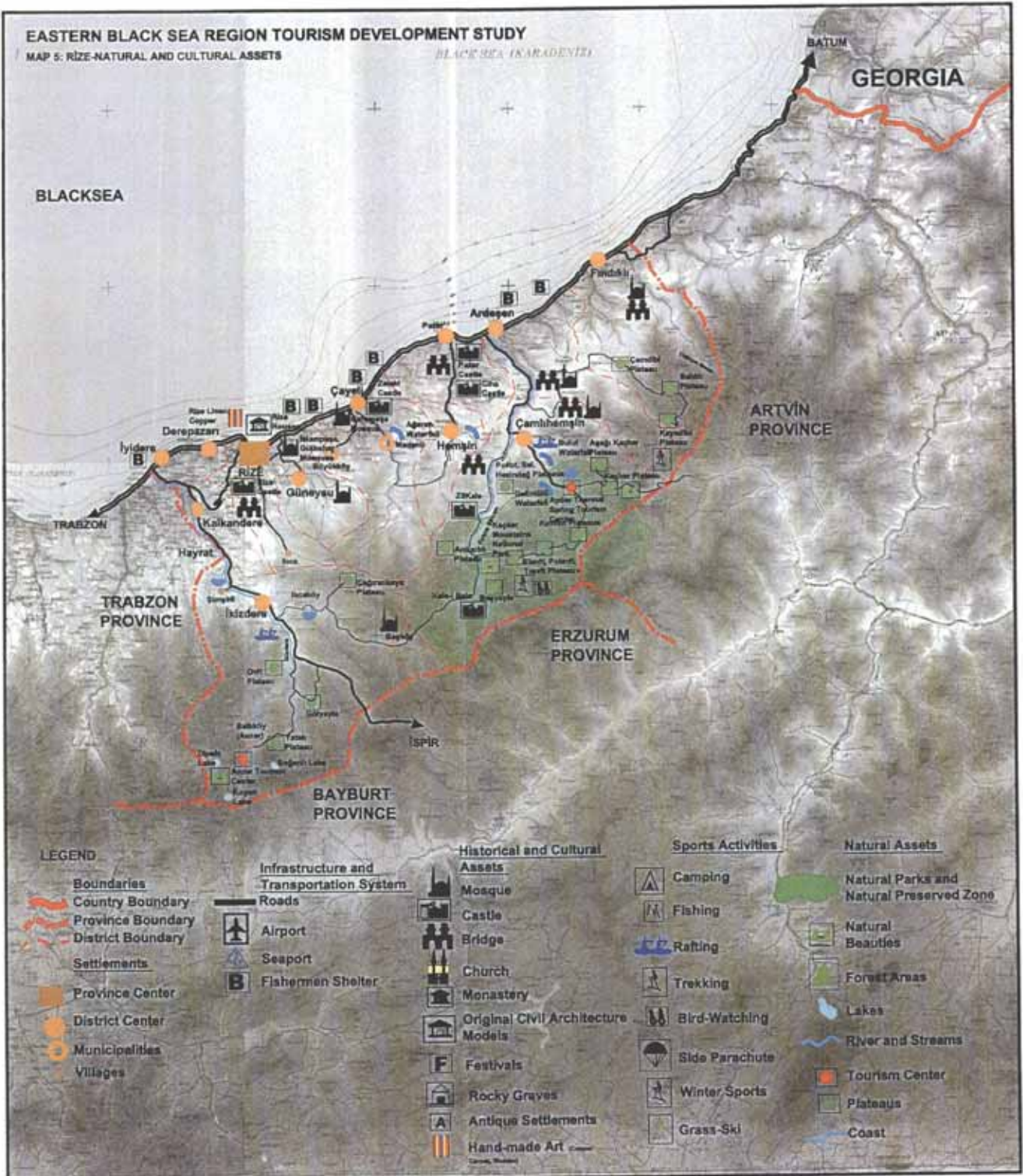
**EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY**

**MAP 2: GİRESUN-NATURAL AND CULTURAL ASSETS**





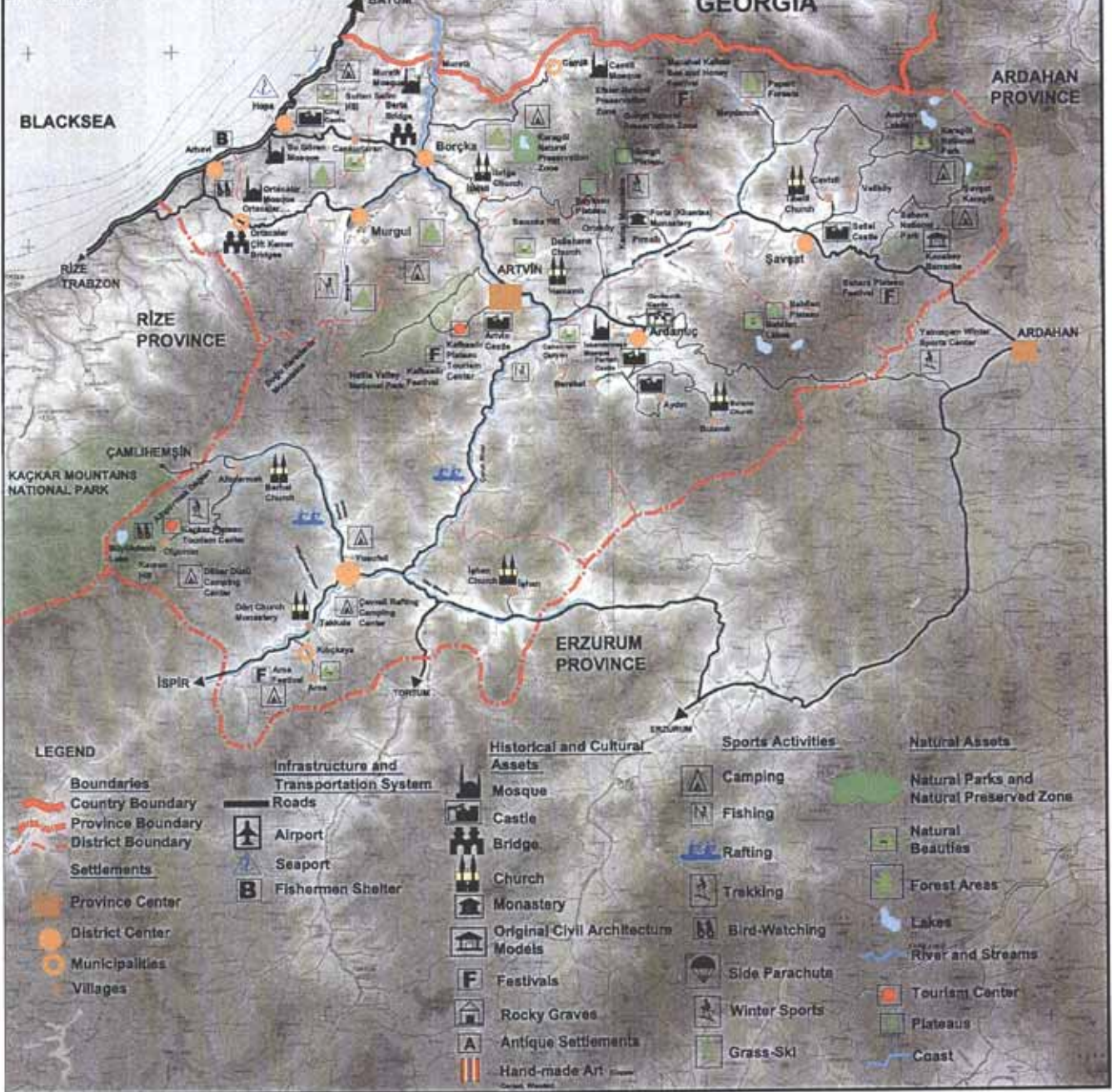




# EASTERN BLACK SEA REGION TOURISM DEVELOPMENT STUDY

## MAP 6: ARTVIN-NATURAL AND CULTURAL ASSETS

EA (KARADENİZ)



LEGEND	Infrastructure and Transportation System	Historical and Cultural Assets	Sports Activities	Natural Assets
Boundaries	Roads	Mosque	Camping	Natural Parks and Natural Preserved Zone
Country Boundary	Airport	Castle	Fishing	Natural Beauties
Province Boundary	Seaport	Bridge	Rafting	Forest Areas
District Boundary	Fishermen Shelter	Church	Trekking	Lakes
Settlements		Monastery	Bird-Watching	River and Streams
Province Center		Original Civil Architecture Models	Side Parachute	Tourism Center
District Center		Festivals	Winter Sports	Plateaus
Municipalities		Rocky Graves	Grass-Ski	Coast
Villages		Antique Settlements		
		Hand-made Art		