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# ANALYSIS OF TURKEY'S TOURISM BY TYPE OF EXPENDITURE: THE IMPACT OF COVID-19, RECOVERY PROCESS, AND GROWTH PERIOD

Muammer Bezirgan\*

## ABSTRACT

The COVID-19 pandemic dealt a significant blow to the global tourism sector, leading to substantial losses in tourism incomes across countries. Due to travel restrictions, border closures, quarantine measures, and health concerns, the number of international tourists rapidly decreased. This situation deeply affected countries heavily dependent on tourism incomes. The recovery period, evwhich began in 2021, is still ongoing.

This study aims to examine Turkey's tourism incomes by spending categories, as it ranks among the top 5 countries in the world. Additionally, this study investigates how the global COVID-19 pandemic impacted Turkish tourism incomes and the recovery process that followed. Tourism incomes are analyzed according to 12 different spending categories. The data set used in the study covers the period from 2012 to 2023. The data was obtained from the "Exit Visitors Survey" published by the Turkish Statistical Institute. According to the analysis results, significant decreases in tourism spending categories were observed during and after the pandemic period. However, following the end of the pandemic's effects, the Turkish tourism sector rapidly recovered, breaking records in terms of tourist numbers and tourism incomes.

## KEY WORDS:

*Tourism Expenditures, Pandemic Recovery, International Tourist*

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## 1. INTRODUCTION

Throughout human history, there have been significant disruptions affecting all societies at different times (Karakaş, 2020, p. 545). Among these disruptions, epidemics have held an important place. Epidemics have been a phenomenon present since ancient times. The first epidemic recorded in historical sources is the Babylonian plague around 1200 BCE. To date, 282 epidemics, large and small, have occurred. Among these, the Black Death, which caused the most deaths (75-200 million people) during the 14th century, stands out. Looking at world history, it is evident that major epidemics have occurred approximately every 100 years (Ateş, 2021, p. 617). The most recent of these epidemics is the Novel Coronavirus (COVID-19) disease, which began to emerge in 2019 (Çoban, 2020, p. 45) and, although its effects began to wane by the end of 2022, continued to have an impact (Savaşkan, 2023, p. 27). These epidemics have both social and economic effects on societies.

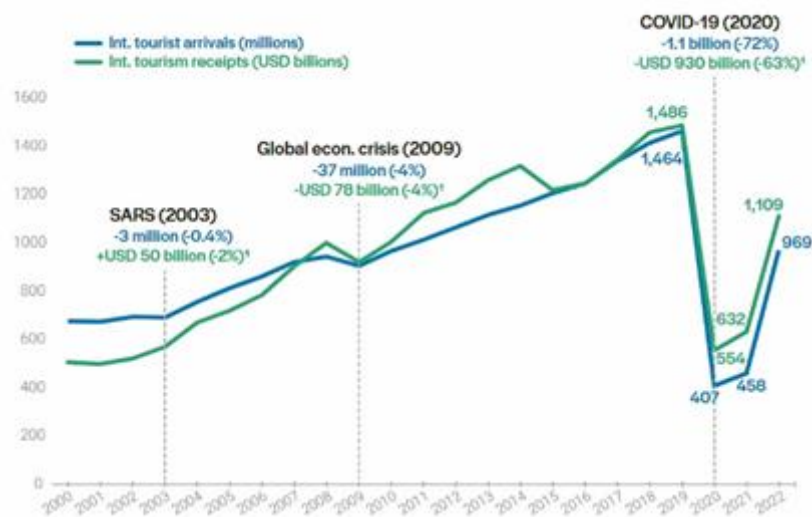
One of the sectors most affected by these epidemics is the tourism industry. Tourism activities, carried out through travel, are a triggering factor for the spread of viral infections among people. Therefore, crisis situations, such as epidemics, negatively affect the tourism sector. A crisis in the tourism sector is defined as an event that threatens the normal operations of tourism-related businesses, creates the impression that a tourist area is unsafe, and leads to a decline in tourism demand and expenditures in that region (Sönmez et al., 1994, p. 2). From this perspective, the global pandemic of 2019 represents a crisis that has caused unprecedented negative effects on the tourism sector.

The main objective of this study is to examine Turkey's tourism incomes by spending categories. The data set used in the study covers the period from 2012 to 2024. The data was obtained from the "Exit Visitors Survey" published by the Turkish Statistical Institute. In this context, the study utilizes data on various spending categories, including "tourism income", "individual expenditures", "package tour expenditures (share of Turkey)", "food and beverage", "accommodation", "health", "transportation (inside Turkey)", "sports, education, culture", "tour services", "international transportation by Turkish companies", "other goods and services", "clothes and shoes", "souvenirs", and "other expenditures".

## 2. THE IMPACT OF COVID-19 ON THE GLOBAL TRAVEL AND TOURISM MARKET

The COVID-19 pandemic has not only caused significant loss of life and health problems, but also inflicted severe damage on the global economy. Tourism has been one of the sectors most affected by the COVID-19 pandemic. Primarily, it has led to a health and economic crisis with devastating effects on developing countries, especially those that rely heavily on tourism for their economies. In an effort to protect their citizens from the pandemic, governments closed borders, imposed national and international travel bans, and implemented various lockdown measures. All these restrictions, with the focus on protecting public health, resulted in a severe contraction of the tourism sector, which is fundamentally based on people traveling from one place to another. In many cases, these measures led to the collapse of numerous tourism businesses (Boz, 2023, p. 5).

**Figure 1.** International Tourist Arrivals and Tourism Receipts, 2000-2022.



Source: TDG Network

The travel and tourism industries faced significant crises during the pandemic period. According to Statista's Mobility Market Insights, the global travel and tourism market experienced a contraction in revenue in 2020, witnessing a remarkable 55% decline compared to the previous year. International tourist arrivals, including overnight visitors, dropped from 1.5 billion in 2019 to only 400 million in 2020, representing an astonishing 72% decrease. This unprecedented drop translated into 1.1 billion fewer international tourists, making 2020 the worst year on record.

In 2020, both international tourism incomes and total export incomes from tourism, including passenger transport, experienced a significant 63% decline. The financial impact led to a loss of \$1.1 trillion. In 2020, international tourism

export incomes, including international tourism receipts and passenger transport fees, saw a major decline from \$1.7 trillion in 2019 to \$0.6 trillion in 2020. The cumulative loss in international tourism incomes for 2020, 2021, and 2022 is estimated to be \$2.5 trillion. Specifically, international tourism incomes excluding passenger transport fees followed a similar trend, falling from \$1.5 trillion in 2019 to \$0.6 trillion in 2020, reflecting a 63% decline. Incomes remained 60% below pre-pandemic levels in 2021 and 26% below in 2022 (Tdg Network, 2024).

According to the United Nations World Tourism Organization's World Tourism Barometer, the decline in international travel in 2020 resulted in an estimated loss of 1.3 trillion US dollars in export incomes, and it is also reported that between 100 to 120 million people working in the tourism sector lost their jobs. In 2021, the direct contribution of tourism to gross domestic product (GDP) was 1.9 trillion US dollars. While this represents an increase compared to 2020, it is still significantly lower when compared to pre-pandemic levels (Ekici & Büyükşalvarcı, 2023, p. 526).

### 3. LITERATURE REVIEW

In this section of the study, the literature on tourism expenditures and the impact of the pandemic on the tourism sector is summarized. The literature includes studies on the numerical effects of the pandemic on the tourism industry, as well as studies examining the impact of the pandemic at both national and international levels.

Korkmaz, Topbaş, and Uğuz (2018) investigated the seasonality of tourism expenditures. The empirical findings of the study revealed seasonal variations in tourism incomes, which generally exhibited stochastic and multiplicative characteristics depending on the type of expenditure. Thus, it was concluded that there are seasonal changes in the spending tendencies of the average visitor to Turkey, and this finding should be taken into account when designing tourism policies in Turkey.

Boz (2023) in his study stated that after the pandemic, tourist preferences would prioritize regions with less tourist congestion, where precautions have been taken, and areas less affected by the pandemic. Yavuz (2022), in his study, calculated the impact of the direct income loss caused by the decrease in the number of foreign tourists in 2020 due to the pandemic on the gross domestic product (GDP). As a result of the analyses, it was determined that the loss in GDP caused by foreign tourists not visiting Turkey due to the measures taken during the pandemic amounted to approximately 18 billion US dollars. Fotiadis et al. (2021) produced a 12-month forecast for international tourist arrivals. Their empirical findings indicated that the pandemic would set the growth of the sector

back by as much as 15 years.

Hoque et al. (2020) aimed to measure the impact of COVID-19 on the tourism sector in China. To achieve this, they utilized a secondary research methodology, collecting data from various sources such as literature, journal articles, research papers, theses, official documents, and others. They concluded that the restrictions imposed following the outbreak of the virus in Wuhan, China, and its rapid spread to other countries, could have a long-term impact on China's tourism sector and significantly affect the country's economy. Şahin, Doğan, and Çakır (2023) investigated the economic, social, and cultural effects of the COVID-19 crisis on travel agencies in Antalya. The analysis revealed that the COVID-19 crisis negatively impacted travel agencies in Antalya, and these agencies shifted toward isolated tourism activities.

In their 2022 study, Akkaşoğlu and Akyol examined the impact of the COVID-19 pandemic on the tourism industry, focusing on tourism incomes, tourist numbers, the share of tourism in Gross Domestic Product (GDP), and employment in tourism. The study concluded that the effects of the COVID-19 pandemic would last for a long time, and that the process would leave lasting damage to the tourism industry, tourism activities, and stakeholders. Özcan (2021) analyzed the activities of businesses operating in the transportation and tourism sectors in Borsa İstanbul (BIST). The study found that the COVID-19 pandemic had a negative impact on the business activities in both the transportation and tourism sectors. Karamahmutoğlu (2022) examined the effect of COVID-19 on the financial performance of transportation and tourism businesses. The study sample included businesses operating in the transportation and tourism sectors that are listed in the BIST Transportation and Tourism Index. The results of the study showed that COVID-19 had a significant impact on the financial ratios of transportation and tourism businesses, except for their liquidity ratios.

In their 2024 study, Tüysüz and Sarıışık aimed to identify the potential positive effects of the COVID-19 pandemic on the tourism industry. The research concluded that the economic effects of the COVID-19 pandemic were mostly viewed as negative, while the pandemic had positive effects in terms of improving the physical environment and social relations. In their 2024 article, Hu, Lang, Corbet, and Wang explored the dynamic behavior of volatility connectedness in Chinese tourism sub-sectors related to COVID-19 stock indices. The empirical results indicated that COVID-19 affected all six tourism sub-sectors examined, but the volatility transmissions between COVID-19 and each tourism sector were not uniform. In his 2024 study, Ramlall developed a Dynamic Stochastic General Equilibrium model to measure the negative effects

of COVID-19 on Mauritius' tourism sector and, consequently, its macroeconomy. The findings show that the tourism export shock caused by COVID-19 triggered stagnation in exports, imports, investment, and tax revenues, while government debt, inflation rates, and transfer income experienced upward momentum.

Chebby, Mmbaga, and Ngongolo (2024) state that the COVID-19 pandemic caused various negative impacts worldwide in terms of biological conservation, the tourism sector, and socio-economic welfare. Jafari, Özduran, and Saydam (2023) explain that the pandemic negatively affected the tourism sector in Famagusta, Northern Cyprus, and that the impacts, particularly regarding business and workplace closures, are still ongoing. The authors highlight that all tourism-dependent sectors, such as hotels, restaurants, travel agencies, and transportation, suffered significant damage due to the COVID-19 pandemic.

#### 4. TOURISM INCOMES OF TURKEY BY EXPENDITURE TYPES FOR THE PERIOD 2012-2023

Between 2012 and 2023, Turkey's tourism incomes have shown fluctuations. The major decline in tourism incomes occurred during the years affected by the 2016 Turkey-Russia aircraft crisis and the 2020 COVID-19 pandemic. Despite the significant losses experienced during the pandemic, Turkey's tourism sector quickly recovered and achieved great success in 2022-2023. Turkey's status as a popular global tourism destination continues to be strong, supported by its natural and cultural riches, developing infrastructure, and strategic location. Figure 2 shows Turkey's tourism incomes from 2012 to 2023.

**Figure 2.** Turkey's Tourism Income (2012-2023)

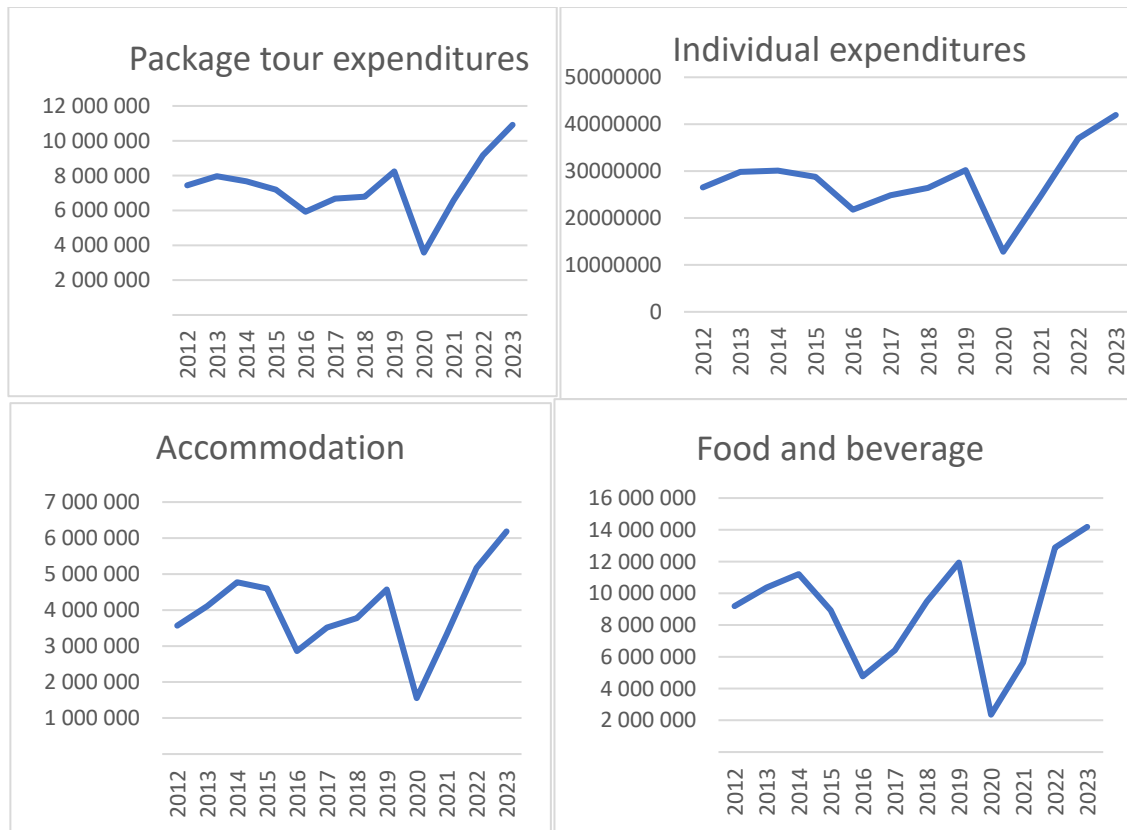


**Source:** Turkish Statistical Institute, 2024

Turkey's tourism income have increased from 2012 to 2023. However, in 2016, when the air crisis occurred between Turkey and Russia, and in 2020, during the pandemic, Turkey's tourism incomes significantly decreased. The global pandemic in 2020 was the biggest crisis in Turkish tourism history. In 2020, the revenue from tourism decreased by more than 50% compared to the previous year.



**Figure 3.** Tourism Expenditures of Tourists Visiting Turkey (2012-2023)

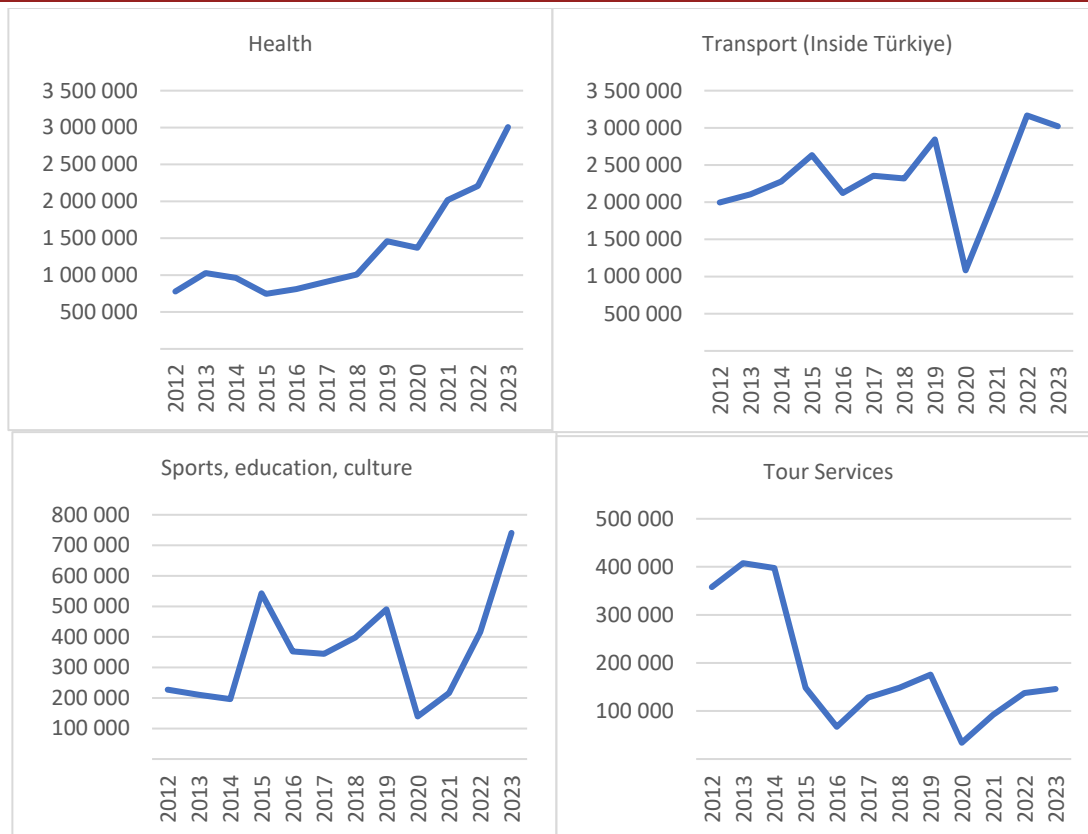


Source: Turkish Statistical Institute, 2024

Turkey's total tourism revenue is divided into two categories: package tour revenues and individual expenditures. In 2020, package tour expenditures decreased by 80% compared to the previous year, while individual expenditures decreased by 58% during the same period. Accommodation expenditures decreased by 66%, and food and beverage expenditures fell by 56%. By 2023, these four revenue groups had recovered from the negative impacts of the pandemic. In 2023, package tour expenditures, individual expenditures, accommodation expenditures, and food and beverage expenditures all reached historic records.

**Figure 4.** Tourism Expenditures of Tourists Visiting Turkey (2012-2023)





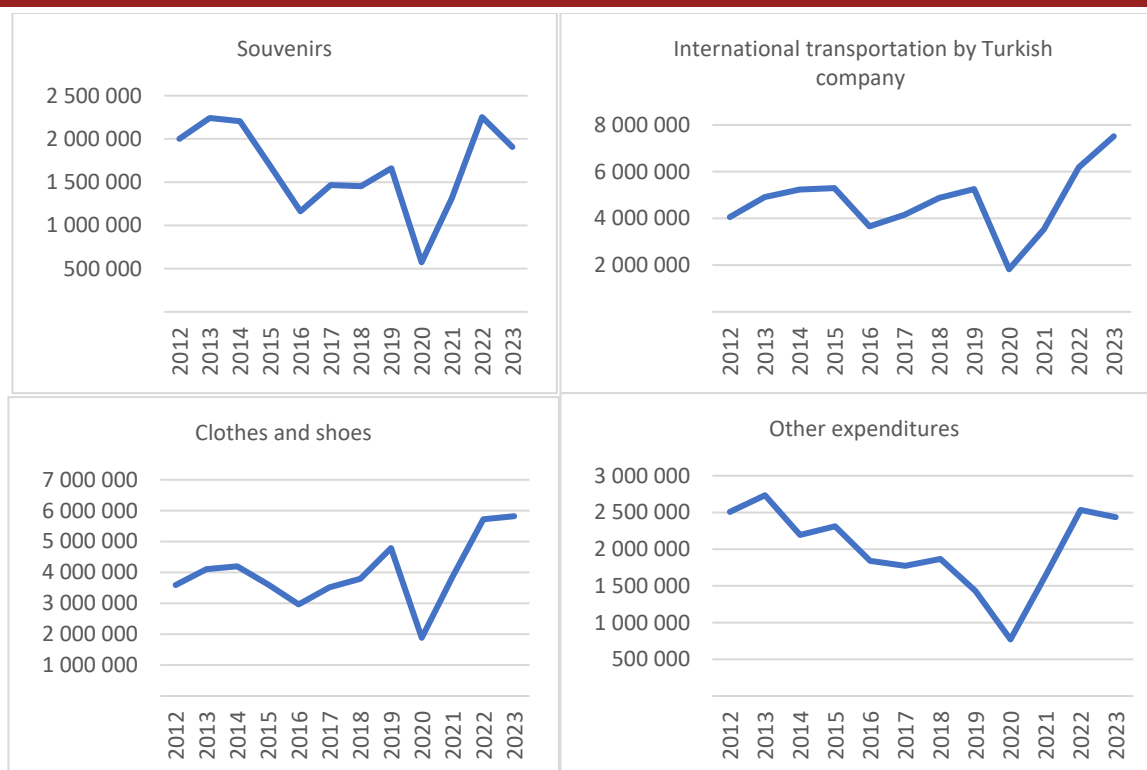
Source: Turkish Statistical Institute, 2024

The types of expenditures made by tourists visiting Turkey vary. The graphs above provide information on health expenditures, transportation, sports, education, culture, and tourism services expenditures.

In 2020, the year of the pandemic, all expenditure types saw record drops except for health expenditures. The most notable aspect within these graphs is that health expenditures were only minimally affected by the pandemic. Transportation expenditures decreased by 42%, sports expenditures by 72%, and tourism services expenditures by 82% compared to the previous year. However, health expenditures, despite the extraordinary impact of the pandemic, only showed a 6% decline compared to the previous year.

By the end of 2023, significant increases were observed in these four categories. According to 2023 data, historic successes achieved before the pandemic were surpassed. However, only tourism services expenditures did not show a sufficient increase.

**Figure 5.** Tourism Expenditures of Tourists Visiting Turkey (2012-2023)



Source: Turkish Statistical Institute, 2024

The latest data on Turkey's tourism expenditures can be found in Figure 5. Gift items, international transportation expenditures, clothing expenditures, and other expenses were generally negatively affected in 2020. International transportation expenditures decreased by 65%, clothing and footwear by 60%, gift items by 65%, and other expenditures by 47%.

## 5. CONCLUSION

The pandemic period led to a significant contraction in the tourism sector for many countries around the world. In 2020, international travel became limited due to the spread of COVID-19, border closures, and quarantine measures were implemented. This resulted in a significant decline in global tourism incomes. Approximately 1.3 billion tourists were lost worldwide, and a decrease of 70-75% in tourism incomes was observed. The sector showed some recovery towards the end of 2021 with the initiation of vaccination processes, and by 2023, the sector had returned to its pre-pandemic levels with the complete end of the pandemic.

During the pandemic, significant declines were observed in major tourism countries around the world. In Spain, the number of tourists dropped from 83 million in 2019 to 19 million in 2020, resulting in a revenue loss of around 75%. France, which hosted 70 million tourists in 2019, saw the number fall to 40 million in 2020, leading to a decrease in tourism incomes of up to 60%. Similarly, Italy

experienced a drop of 55-60% in tourism incomes, with major cities like Rome and Venice seeing large gaps in tourist activity. The United States also suffered greatly from the pandemic, with a decrease of about 40% in tourism incomes in 2020. Thailand, a country that generates significant income per tourist, experienced a revenue loss of around 80% in 2020, while India saw a decline of approximately 50-60%. Greece, similarly, faced a decrease of up to 80% in tourism incomes due to the pandemic.

Turkey, like other countries competing in tourism incomes, experienced similar declines. In 2020, Turkey's tourism incomes dropped by 65%, with incomes of \$42.5 billion in 2019 falling to just \$15.1 billion in 2020. A detailed examination of tourism expenditures during the pandemic period in Turkey reveals interesting findings. In 2020, individual expenditures decreased from \$30.9 billion to \$12.8 billion. Package tour expenditures dropped from \$11.9 billion to \$2.3 billion. Food and beverage expenditures fell from \$8.2 billion to \$3.2 billion, accommodation expenditures from \$4.5 billion to \$1.5 billion, and transportation expenditures from \$2.8 billion to \$1 billion.

Among these types of expenditures, the largest decrease was observed in tour services expenditure with a decline of 82%, while the smallest decrease was in health-related expenditures, with a drop of just 6%. Turkey's successful performance in the health sector during the pandemic has continued to attract health tourists to the country, thus preventing a significant decline in this area. The situation as of 2023 is very encouraging. Turkey has continued the momentum it achieved in tourism incomes prior to the pandemic. In 2023, Turkey experienced a significant recovery in the tourism sector, approaching pre-pandemic levels and generating approximately 55 billion dollars in revenue. This success was supported by Turkey's popular tourist destinations, cultural riches, natural beauties, and the increasing number of international tourists. In particular, Turkey attracted attention during the summer of 2023 with a high influx of tourists, becoming one of the most preferred tourist destinations globally.

## **DISCLOSURE OF CONFLICT**

The author declare that no conflicts of interest exist

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