



Turkish Tourism Industry at Metamorphosis: A Shift from Traditional Tourism toward Culture and Nature Tourism

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ABSTRACT

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The present study analyzes the change of Turkish tourism industry from popular mode of mass tourism to a more assorted type of cultural and nature-based tourism. The research focuses on the historical development and expansion of tourism sector through 1980s, identifies the impetus for change in 1990s and examines the present status of niche tourism in Türkiye. Analysis of various statistics, current literature, policy documents, and case studies from different destinations reveals that while strong efforts have been made to diversify tourism sector in Türkiye, many challenges hinder such attempts including seasonality, infrastructure deficits, environmental pressures, and governance coordination gaps. The findings of the present study indicate that Türkiye has a good potential to expand tourism activities other than the traditional "sea, sand, and sun" (3S) model which can help reducing regional disparities and encourage sustainable development. However, maintaining a balance between environmental protection, social equity and economic development is a big challenge that requires careful planning and policy implementation. This study contributes to understanding the tourism evolution in different emerging destinations and policy formulation for sustainable tourism development.

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1.0 Introduction

Türkiye has recognized one of the world's most popular tourist destinations for decades due to rich tapestry of natural, historical and cultural resources and its location at the crossroads of Asia and Europe. Since 1980s, the country's tourism industry has gained momentum with expansion of mass tourism in coastal areas of Mediterranean and Aegean regions after the adoption of tourism incentive law (Önder et al., 2009). The 3S model of tourism represents the large-scale holiday tourists which are interested in "sea, sand, and sun" for leisure remained successful for economic gains and earnings of foreign exchange (Soyak, 2014). However, growth of mass tourism has also increasingly shown its limitations in terms of environmental sustainability, seasonal concentration, and economic volatility. Therefore, a deliberate transformation of country's tourism sector started in 1990s to diversify the traditional beach tourism model toward more sustainable forms of tourism (GÜLBAHAR, 2009). Hence, new tourist destinations started to emerge and portray extensive cultural heritage and distinct natural landscapes. This shift is very parallel to global tourism trends where tourists seek different experiences and environmentally responsible travel.

There are several reasons which make the insights of Türkiye's tourism transformation very purposeful. First, Türkiye is one of the significant case studies from developing countries seeking to diversify tourism modes beyond mass tourism. Second, the country has rich potential of cultural and nature tourism, including 22 UNESCO Cultural Sites, varied topographies ranging from extended coastlines, karst valleys, pasture lands, mountains, and a cultural heritage of various civilizations (UNESCO, 2025). Third, transformations of tourism models and associated barriers such as infrastructure gaps, governance issues, and the persistence of established tourism patterns provide useful insights for other destinations. The present study aims to analyze the historical development of Türkiye's mass tourism model from the 1960s through the 1990s and identify the primary motives that stimulated the shift toward cultural and nature-based tourism. Besides, it also examines the current state of cultural tourism development in Turkey, including heritage tourism, UNESCO sites, and assess the development of nature-based tourism such as ecotourism, rural tourism, and adventure tourism. The research also evaluates the challenges, opportunities, and economic impacts of transformation of tourism sector and provides recommendations for sustainable tourism development in Türkiye.

Literature Review

Development of tourism destinations is considered one of the key elements for economic prosperity in low-income regions as an effort to provide alternative income opportunities (Gelbman, 2022). However, different theoretical approaches have been developed to analyze the sustainability of tourism destinations of which Rich and Butler's Tourism Area Life Cycle (TALC) model is widely discussed in literature. According to their model different tourism destinations pass through six stages of evolution that are exploration, involvement, development, consolidation, stagnation, and finally either decline, stabilization or rejuvenation depending on stakeholders (Butler, 1980). Türkiye's tourism trajectory aligns closely with this model, having experienced rapid development and consolidation phases in the late 20th century, followed by recognition of

stagnation risks and deliberate rejuvenation efforts through diversification.

Literature on development and evolution of different tourism destinations reveals that it does not simply require adding new products to old destinations, but a more practical and comprehensive approach is required. A successful transformation of tourism modes demands fundamental shifts in planning approaches, stakeholder engagement, infrastructure development, and marketing strategies. Diversification in tourism destinations plays vital role in combating issues of overcrowding and breaching the limits of carrying capacity to reduce environmental degradation. Different tourism destinations worldwide have documented such transformations from mass tourism to alternative or “niche” tourism with varying degrees of success depending on local contexts, governance capacity, and market conditions.

The Post World War II era observed a rapid rise in development of new tourist destinations worldwide, especially in the Mediterranean regions. A rise in income and increased leisure time in developed countries created high demand for beach tourism (Tosun et al., 2003). Therefore, 3S model of tourism development became popular among many developed and developing countries to generate more tourism revenues. This model is characterized by large-scale coastal resort development, package tour operations and charter flights, seasonal concentration (typically summer months), price-competitive positioning, high volume, relatively low per-capita spending, and significant environmental and social impacts on coastal communities. Although mass tourism is considered economically beneficial in the short term, criticisms are made for its negative impacts on natural environment and local cultures. Critiques also highlighted the issues of economic leakage, vulnerability to external shocks such as economic crises, political instability, and health pandemics associated with 3S model of tourism. These constraints have provoked many destinations to seek diversification strategies.

Cultural tourism involves travel to the sites of man-made landscapes or buildings that have some significance for the local communities. Travelers who have personal interest in historical, religious, linguistics, artistic or national heritage of a community visit such valuable regions or institutions. Cultural attractions may also include museums, archaeological sites, traditional celebrations, religious sites, and foods and beverages. In comparison to mass tourism or 3S tourism, cultural tourism is considered more sustainable due to its little impact on natural environment (Frey & Steiner, 2011). As a specific form of tourism, it tends to attract higher-spending and more educated and responsible tourists. It contributes to social and economic equity as it can be distributed across a wider geographic area and is less seasonally concentrated. Besides, it can also provide opportunities to preserve local heritage and can offer ways of economic development and pride for local communities. However, cultural tourism can also contribute to different negative socioeconomic and environmental concerns. The risks of cultural erosion, commodification and commercialization of local products, concerns of cultural authenticity, and damage of cultural sites due to over visitation (Jones et al., 2017).

Nature tourism is a product which includes various activities based on utilization of natural environment for different purposes. These activities include visiting national parks, bird watching and listening, mountaineering, and experiencing unique ecosystems. The concept of ecotourism is

frequently used in parallel to nature tourism (Kru, 2005). According to The International Ecotourism Society, ecotourism is described as responsible travel that conserves the environment, sustains the well-being of local people, and involves interpretation and education. The development of nature tourism can contribute to more sustainable path by increasing environmental awareness among tourists. However, effective outcomes of nature tourism are embedded in careful planning to conserve the natural environment which is a big challenge that requires robust management frameworks, monitoring systems, and stakeholder cooperation.

Tourism sector of Türkiye is based on its unique geographic position, rich historical legacy, political economy, and development strategies. Analysis of early studies has shown a rapid growth of coastal tourism in the 1970s and 1980s, supported by tourism incentive laws, state planning and infrastructure investment (Soyak, 2014). Recent literature however sheds light on diversification efforts in tourism sector, including the development of health tourism, education tourism, and niche or alternate tourism. Several studies have considered the specific aspects of tourism transformation in Türkiye such as the role of government policies, the challenges of sustainable coastal management, and case studies of specific destinations or tourism modes (Tosun, 2001). However, comprehensive analyses of the overall shift from 3S tourism to cultural and nature-based tourism remain limited, creating a gap that this research aims to address.

Methodology

The present study has used both quantitative and qualitative approaches to analyze empirical research, official documents, government reports and case studies to comprehend the transformation of tourism sector in Türkiye. Descriptive analytical techniques allow us to trace the dynamics of tourism demand over time and identify the trends, patterns and motives of change from beach tourism to other forms as part of diversification process. The study utilizes statistical data, reports, government plans, tourism management frameworks and applied strategies on Turkish tourism development, published primarily between 1990 and 2025. Meanwhile, in-depth analysis of some tourism destinations as case studies also contributes to highlighting different aspects of tourism transformation.

Historical Development of Mass Tourism in Türkiye

Tourism sector of Türkiye gained attention in national development policies in 1960s as an important economic development sector. For this purpose, the country's Five-Year Development Plans, initiated in the 1960s, started to appreciate tourism as valuable sector for exchange earnings and investments were planned to develop tourism infrastructure in coastal regions to attract more foreign tourists (Naycı, 2009). Hence, tourism potential of the country was recognized for regional development in coastal areas as important source of creating more job opportunities and economic development. During this period tourism sector was institutionalized by development of policy framework to support tourism development. Financial support to develop tourism-based infrastructure such as hotels, resorts, restaurants and other recreational facilities was provided by public enterprises and entrepreneurship notably the Turkish Bank of Tourism. As part of tourism planning and markets several airports were constructed in key coastal cities and the road network was improved to connect large urban areas.

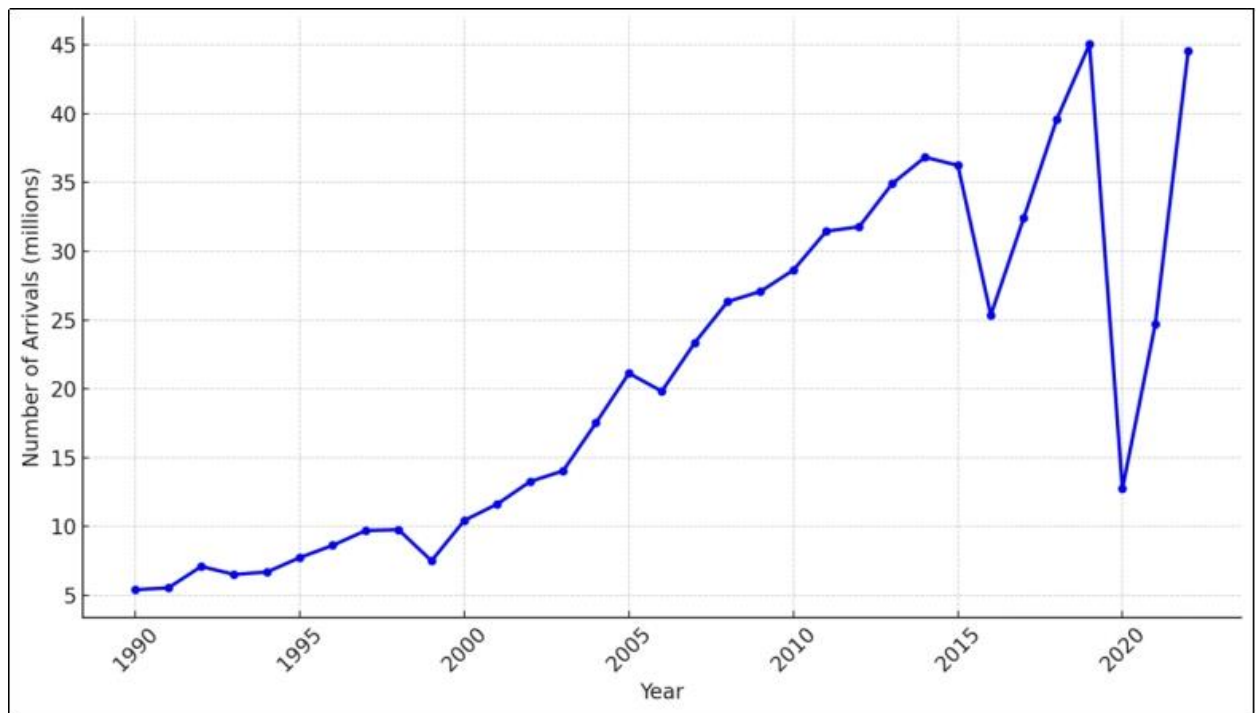


Figure 1: Number of International Tourists 1990-2022

Türkiye's extended beaches, favorable climatic conditions and unique relative location provided ideal conditions for holidaymakers. By the 1980s, therefore, Türkiye experienced an accelerated growth in coastal areas of Mediterranean and Aegean regions. Introduction of liberal economic policies under tourism incentive law of 1982 facilitated foreign investment in tourism infrastructure and provided catalyst to tourism development (Tosun et al., 2003). Besides, government's support to tourism entrepreneurship also encouraged the rapid construction of lodges, hotels and other tourism facilities particularly in coastal areas. Meanwhile, international marketing of Türkiye as a safe, affordable and sunny alternative through European tour operators also played vital role in attracting large number of tourists. As a result, Türkiye saw a dramatic increase in tourist arrival from approximately 1.3 million in 1980 to over 5 million by 1990, with the vast majority concentrated in coastal destinations. Out of several coastal cities, Antalya remained an important destination for beach tourism, showing continuous growth in tourism demand and infrastructure development.

Over time, tourism initiatives in coastal regions of Türkiye accelerated the demand and by the late 1980s and early 1990s tourism in south and southwestern coasts started to show distinctive characteristics of mass tourism or 3S model of tourism. Tourism development remained concentrated on few popular coastal destinations of Antalya, Bodrum, Marmaris, and Fethiye in the Mediterranean and Aegean regions with extreme seasonality. Several challenges associated with tourism seasonality in the destinations include social insecurity for employees, off season maintenance costs of facilities, overutilization of natural resources during peak season and economic instability for local communities. To satisfy the demands of tourist's demand, tourism products also become standardized to meet the standards of mass tourism. For example, promotion

of all-inclusive packages and production of specific products for beach activities. Mass tourism in these regions also contributed to rising prices and competitive markets. Environmental degradation because of overtourism also started in the form of water pollution, loss of biodiversity, coastal erosion and changing natural landscapes. Moreover, seasonal migration for work, loss of local communities, cultural shocks, and cultural commodification were also observed. Economic leakages also started as most of the businesses were in the hands of big entrepreneurships.

Case Study: Antalya's Tourism Evolution

Located on the blue waters of mediterranean sea with expanded beaches, Antalya is one the most important hub of mass tourism activities in Türkiye. At the start of tourism development policy in 1960s, Antalya was relatively small city which became famous center of entertainment for international tourism within two decades with millions of tourist arrival. With the passage of time, large numbers of tourists interested in camping put great pressures on coastal land use, raising concerns about degradation of natural environment due to over commercialization of the coastal lands(Doğantan et al., 2017). Thus, mass tourism or 3S models started problems of exceeding carrying capacity of the destination and serious management issues of coastal resources which serve ground for intensive tourism activities. Seasonality was another issue which brought socioeconomic stresses not only on local population but also workers from neighboring areas. Tourism management strategies later tackle the issue of seasonality by introducing sports and event tourism e.g. hosting winter training camps for European football teams (Erdogru & Yazici, 2013). The primary objective of such diversification was to deal with seasonality issues and extend the number of visitors to winter months for year-round economic opportunities for the employees in tourism sector. Such successful initiatives highlighted the need for diversification and utilization of the maximum potential of the area to overcome negative impacts of 3D tourism model.

Drivers of Tourism Transformation and Diversification

Tourism became significant source of development by the early 1990s, contributing a pivotal role in exchange earnings, creating employment opportunities and regional developments. At the same time, growing concerns about negative impacts of mass tourism growth also started to emerge and questions raised about the degradation of coastal environments, increased water pollution and long run sustainability. Economic stability also became another important issue as price-sensitive international markets put economic stresses on Türkiye's tourism earnings in the form of economic downturn and competition from other similar destinations. Regional disparities were also visible as mass tourism was only developed in limited coastal regions of the country while interior regions with cultural and nature tourism potential received little or no international tourist arrivals. Thus, a policy shift from 3S model to more diversified approach in tourism development to deal with these issues and transformation towards more sustainable modes of tourism started in the late 1990s and early 2000s(Soyak, 2014).

Changing Consumer Preferences

International tourism patterns and preferences of tourists started to change in 1990s with varied impacts on Türkiye's tourism industry. Such changes provide several benefits as well as challenges for fast-growing 3S model of tourism and diversification strategies. Research on

tourism demand suggests changing preferences of tourists from the 1990s onward towards more varied and versatile activities. Tourists started showing interest in cultural, historical and natural sites apart from traditional resort holidays. There were different reasons behind this change in demands including increased level of education and cultural awareness, increased connectedness through internet, improved transportation and impacts of globalization. The motives behind demand diversification included growing global environmental concerns and need for sustainability, overutilization of mass tourism products, and altered preferences due to more travel experience.

Traditional source markets for Turkish beach tourism (Germany, UK, Netherlands) showed signs of maturation, with growth rates slowing and tourists seeking new experiences. This situation requires developing new market segments for tourists' attraction or advertising different products to existing markets. Meanwhile, development of new tourism destinations with similar characteristics in other countries of Mediterranean, North African, and Southeast Asian regions gave rise to price competition which hovers Türkiye's market position in the market. Besides, market competition based only on price was not sustainably possible due to growing prices with growth of economic development in Türkiye which was another impetus for diversification. The overall change in consumer culture also known as "Experience Economy" in which unique experiences are valued for customers rather simple provision of commodities, tourists also sought to explore destinations that provided memorable and distinctive experience other than 3S packages.

Growing Environmental Concerns

Concerns about environmental protection and conservation were also a powerful driver behind world-wide transformations in tourism sector. Rapid expansion of beach tourism with all-inclusive packages, overutilization of coastal landscape for camping and opening of new hotels and resorts started to cause different environmental costs which were increasingly visible and documented by the 1990s. Primary environmental issues included, destruction of coastal areas and beach degradation, traffic congestion in urban areas, water pollution from inadequate sewage treatment, increase use of energy, depletion of freshwater resources, loss of natural habitats and biodiversity, and visual pollution from uncontrolled construction.

Empirical studies particularly expressed concerns about the overuse of coastal and historical natural resources, stating that uncontrolled mass tourism endangered the very resources upon which the industry stood on (KENAR, 2023). The acknowledgment that environmental degradation could damage the long-term tourism potential created motives for more viable methods to safeguard the environment. International environmental movements and emergence of sustainable development approach in 1992 Earth Summit also emphasize the environment friendly tourism policy formation. With emergence of new concepts such as "sustainable tourism," "nature tourism", "geo-tourism", "ecotourism," and "responsible travel" gained prominence in subsequent years to equalize environmental and social aspect of development.

The popularity of such ideas assert pressure on member states to regularize and adopt more environmentally conscious approaches while planning tourism. In this global perspective,

scholarly and policy debates in Türkiye increasingly focused on the necessity for integrated coastal zone management to balance economic development and environment protection. The realization of finite coastal resources and fragile natural ecosystem contributed to change of development-first approach of earlier decades to careful management of resources.

Economic considerations

The coastal tourism in Türkiye is popular during summer months only which causes extreme seasonal concentration of the activity creating significant economic inefficiencies. The seasonal nature of mass tourism in coastal areas causes underutilization of capital investments in the form of resorts, infrastructure etc. during off-season months. Seasonal employment patterns create social insecurity and limited year-round income for workers and communities. It also prompts brain drain and migration of skilled labor to seek permanent jobs. Little or no activity during winter months also impacts circulation of cash in tourism businesses which is concentrated only to months. Such negative economic impacts raised concerns about finding alternative tourism products to get year-round benefits from tourism. Some destinations like Antalya have set examples of promoting alternative products to attract tourists other than peak season and improve economic sustainability.

Mass tourism is considered low margin in nature where there are significant number of economic leakages due to foreign investments and use of imported goods. Development of higher-value tourism segments is therefore providing valuable incentive to overcome revenue leakages. In this perspective, promotion of cultural and nature tourism is considered good alternatives to attract high income, environment responsible and educated tourists who would generate greater economic benefits per capita. For this purpose, the interior regions of Türkiye, largely bypassed by coastal tourism, with rich cultural and natural resources offered ideal platform to develop transformation strategies in tourism sector. Diversifying tourism across the country also contributes to balance economic growth and overcoming issues of regional disparities.

In response to these drivers, a change is observed in Turkish tourism policy which is visible in later editions of country's Five-Year Development Plans in which diversification of tourism modes, sustainable tourism development and strategies for alternative tourism were emphasized and discussed thoroughly. Türkiye' earlier development plans solely focused on economic development with expansion of coastal tourism to gain maximum economic output. However, later policy frameworks recognized and acknowledged the need for more balanced approach to safeguard the environment and create social equity while expanding and diversifying the country's tourism sector. Consequently, a shift from mass tourism to other tourism products is observed and different government and private agencies began actively promoting alternative tourism types, including:

- Cultural and heritage tourism leveraging Türkiye's historical assets
- Nature-based tourism and ecotourism
- Health and wellness tourism
- Conference and business tourism
- Sports tourism

- Religious tourism

Meanwhile, debates on policy frameworks also distinctively addressed the use of sustainable tourism approach to minimize the environmental degradation due to overtourism in coastal regions of the country and adoption of balanced approach to maintain steady improvement of social, economic and environmental aspects of society. This included discussions of:

- Coastal protection zones
- Environmental impact assessment requirements
- Carrying capacity limits
- Sustainable development guidelines

Apart from the national policy, different destinations also adopted diversification strategies on their own to broaden the scope of tourism products. Beyond national policy, individual destinations and municipalities developed their own diversification strategies. There are many case studies from all over Türkiye with successful formulation and implementation of such policies to reframe destinations around typical identities provision of varying and unique experience other than traditional mass tourism. Currently, Türkiye's tourism industry is considered matured which is equipped with field experts, well-educated professional, managers and policy makers.

Conclusion

The present study identified Türkiye's struggle in transformation and diversification of tourism products and associated challenges with significant progress. Mass tourism is still a popular genre of tourism world-wide, and Türkiye is not an exception. It hosts millions of tourists every year interested in spending leisure time on sandy and sunny beaches of Mediterranean and Aegean seas. However, the country has also made several successful efforts to diversify tourism products other than traditional sea, sand and sun model by attracting tourists to new modes of recreation like cultural and nature tourism. Such efforts have also contributed to regional disparities in tourism development and interior regions also started to get economic benefits from tourism which otherwise bypassed largely by mass tourism concentrated on coastal areas. Nowadays, many tourism destinations offer unique experience embedded in cultural and natural resources of the country. Such initiatives have also increased environment awareness and sustainability imperatives.

However, the transformation from mass tourism to alternative tourism is not fully successful as traditional coastal mass tourism still dominates in terms of visitor numbers and revenue. Besides, the issue of seasonality also remains an important challenge. A lot of tourism potential in interior regions of Türkiye is still untapped due to poor infrastructure, lack of investment and capacity building, lesser involvement of stakeholders which hinder the development of cultural and nature-based tourism. At the same time, environmental pressures in newly developed destinations continued with risks of simply replicating mass tourism problems in new contexts.

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