



NEAR EAST UNIVERSITY

GRADUATE STUDIES

THE PRESENT SITUATION OF TOURISM

IN THE T.R.N.C AND HOW TO

DEVELOP IT

BY

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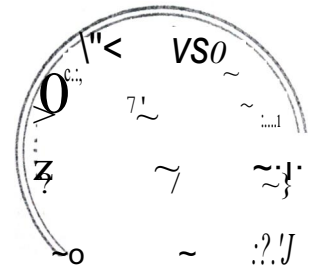
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T.R.N.C



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Abstract

The present situation of tourism in TRNC and how to
Develop it

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Some recommendations and solutions have been given to solve the problems that access in the TRNC and prevent the tourism industry to be developed in the future. Some techniques such as statistical data collection and interviewing have been used to make the study easy and to get a complete idea about the tourism industry in TRNC. Results have been founded in a good favorable; where we have observed an increase in the number of tourists from one year to another; so this increase seems favorable for the attainment of the specified tourism policy. Other result shows a short break system during the tourism season in the TRNC, which means that there is little number of youngs who comes to TRNC for visit especially from Europe, that is because of the big distance between TRNC and Europe, also for the reason that there is no direct transportation's with the other countries and this will cause the passengers to wait long time in Turkey and spend time to get in other plane so that to reach to TRNC; and this means spending of time and money, so from the point of view the time for the youngs is very important especially for the one who works in companies or other places and who gets a short holiday to visit TRNC. So because of the short break; we can find that most of the tourists who comes to TRNC are over 50 years old, who are retired from their jobs and time doesn't important for them.

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THE OBJECTIVE OF THE STUDY:

The aim of this study is to show how the tourism industry plays and occupies an important place in the economy of T.R.N.C and in the balance of payment. In addition to that, it shows the developing of the industry from the previous time until now, inspite of the political and economical factors that affect the country as a whole and the tourism industry as a sector, and prevent the improving of the tourism in TRNC. Also the study will show how the marketing mix for the tourism industry effect the industry for example, the effect of the price and promotion in the number of tourists. Also the study will give and analyze the problems that faces the tourism industry, advantages and the Disadvantages that the tourism season brings and creates to the TRNC. Finally the study will show how can we develop the tourism industry by suggesting some recommendations to the problems that stands against the development of the tourism industry so that it can be reaches to a successful level in the domestic and international tourism.

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1. INTRODUCTION

1.1 WHAT IS TOURISM

TOURISM:-Is one of the world's largest growth industries, and as a major social and economic activity in many parts of the world, its study of increasing academic and practical interest. Tourism today emphasizing general patterns that is drawn from empirical studies, geographical analysis and theoretical considerations. Tourism is a major source of export revenue for a great number of countries in the world. For the development countries, the tourism provides for as much as one third of their receipts from trade in service. Tourism is essentially about people and places, the places that one group of people leave, visit and pass through, the other groups who make their trip possible and those they encounter along the way. In more technical sense, tourism can be thought of as the relationships and phenomena arising out of the journeys and temporary stays of people traveling primarily for leisure or recreational purposes. In a geographical sense, a basic distinction between tourism and other forms of leisure, such as that practiced in the home (e.g. watching television) or within the urban area (e.g. going to the local swimming pool), is the travel component. But generally tourism is taken to include at least a one-night stay away from the place of permanent

residence. These travel and stay attributes of tourism in turn give rise to various service demand which may be provided sectors of the tourists industry so that in an economic and commercial sense tourism might also be distinguished from other types of leisure activities. Tourism is moreover, an increasingly important " engine of employment" for all countries. As the economic nature of Tourism is based on itinerant consumption of services of all types including the purchase of transportation, lodging, meals, travel and tour arrangement, personal services. Finally the tourism starts with transportation and followed by hospitality and promotion in order to complete it's cycled.

2. TOURISM IN TRNC

2.1 GEOGRAPHICAL STRUCTURE AND CLIMATE:

North Cyprus is a paradise island of incomparable natural beauty, full of unique historical treasures. North Cyprus lies in the clear blue water of the Eastern Mediterranean, which is situated just 40 miles from the coast of Turkey, 60 miles from Syria and 250 miles from Egypt. After Sicily and Sardinia, it's the third largest Island in the Mediterranean Sea. Owing to its climate, historical wealth, natural beauty and geographical situation, the TRNC is an ideal place of tourism. North Cyprus, the place on earth so close to heaven, provides a most hospitable welcome, with its friendly people, and its great natural beauty, which is unspoiled, unpolluted and uncrowded. There are miles of coastline with golden sands bathed in sunshine almost every day of the year. There is much of historical interest to reflect nine thousand years of history, and plenty of good hotels and restaurants which provide Mediterranean and International cuisine, not to mention simpler and cosier places to enjoy the many local dishes.

The island enjoys one of the healthiest and most pleasant climates in the world; the winter is short and warm, and the weather always predictable. In these idyllic surroundings it is possible to sunbathe almost every day, and to

swim in the clean and clear blue sea. The Landscape varies enchantingly within short distance from Pinnacled Mountain to fertile plain. All the Mediterranean fruits are here in abundance from olives to grapes, from the finest vegetables to every kind of citrus. Mimosa, hibiscus and oleander are to be seen in plenty, among wide rang of wild flowers. Neolithic remains have shown that this early paradise has been inhabited since the New Stone Age. Its strategic position, as much as its attractions as a place to live, has meant that Cyprus has had many different rulers over the centuries. The Hittites were followed by Egyptians, Assyrians, Persians, Romans, Byzantine, Lusignans, Venetian and Turks have all held sway; each has left traces to be seen daily in the architecture as well as the cuisine of the Island. Gothic churches rub shoulders with crusader castle, and ruined temples with British Colonial in a homogeneous and fascinating blend of styles. The all-pervading sense of the past adds to the enchantment of today Tomoku unforgettable holiday.

2.2 THE IMPORTANCE OF TOURISM FOR TRNC:

The Tourism is one of the main economic factors in the be a basic priority sector and one of the main factors of the economic development and the important factor in the balance of payment were it occupies a very important

place in the economy of TRNC. In parallel to the economic program adopted by the TRNC, the tourism sector has been out as the most important sector for the improvement of singled the economy and the government is to provide all the necessary incentives for the prospective in the tourism sector. The net income from tourism is shown as 189.2 million US (\$) for the year 1997, and this amount can be increased in the future time if we spend some effort for the tourism industry, also an increase in the net income from tourism will fed the economy especially with the foreign currency which is the most resource and factor that can recover and fed the economy, although we know that the value of Turkish Lira is low because of the inflation rate in TRNC.

2.3 HISTORY AND DEVELOPMENT OF TOURIS1\1 IN T.R.N.C: -

North Cyprus was heir as a single entity to British colonial legacy, which provided a sound basis for the rapid development of a modernized society. And, indeed, despite political problems, the island developed at leart as a single geographical (through not political) until form 1960 to 1974. Even the former director of the south Cyprus tourism organization Antonio's andronikous while on the one hand stating that at independence in 1960 tourism was in a state of complete decline, tourist traffic having been

reduced to a mere trickle due to the political uncertainty brought about by the liberation struggle against colonial rule, during the years 1955_1959, 'recognizes in the same breath the head start conferred upon newly independent state principally by that same colonial rule. However, the government was in away fortunate in that it did not have to grapple with the more serious problem starvation, extreme poverty, and social problems, e.g. extend family. North Cyprus as a geographical entity was, at the division of the island in 1974, no more and no less an undeveloped country than south Cyprus to benefit from a resumption and expansion of tourism. Indeed, it contained what had previously been the two major tourist areas. However in the years that followed host of extraneous circumstances, some of the bitterer in extreme, came into play that resulted in drastically differing rates of tourism development in North and south Cyprus.

i) Tourism in North Cyprus to 1974: -

In the middle of the last decade of British rule in Cyprus, the tourism flickered fitfully for a while, and then went out. The debilitating effect of the EOKA campaign on tourism in that period was to presage for tourism a career checkered by disruption in an island which, though ideal for tourism, was in the mid-1950s only just waking up to its possibilities. However, the emergence of tourism in the modern sense was delayed as a consequence of

EOKA campaign until after independence in 1960. In the mean time, the distribution of the tourism installation as found early post-second World War period, with a preponderance of summer 'retreat' facilities. After independence in 1960, coastal tourism, mainly in the Kyrenia and Famagusta areas developed rapidly though in a haphazard and uncontrolled way, at that time the number of the tourists arrivals where increased to 25,700 in the 1960, and 1971 it was increased to 178,000 after complete decade. In 1973 the traveling public from abroad, especially Britain, select their holiday destinations more influenced by effective marketing than little understood local publican tension, thus it came about than 1973, in which something like normality prevailed the number of tourists arrivals reached to 264,000. At that time only a very small number of Turkish Cypriot entrepreneurs were involved in the hotel business. In addition to these ambitious Turkish -Cypriot projects; there were a few number of the business men who run a little number of hotels in the island where these hotels were serving domestic travelers, and which brought their proprietors and staff no experience of international tourism and the standards required for its promotion. The consequence of exclusion of Turkish Cypriot from participation in the development of the international tourism in Cyprus was after the division of the island, and at that time there was no fund expertise

among the Turkish Cypriot either in conducting establishments of the type required for international tourism or in managing such essential ancillary activities as marketing the 'product' abroad and co-ordination transport between foreign countries and North Cyprus. In 1974 the tourism in north Cyprus had an extreme rapid development especially when the environment received the protection of an accident of history during the critical period for Mediterranean tourists destinations.

ii) Tourism in North Cyprus After 1974: -

The tourism of 1974 that is when the Turkish intervention naturally came from the north, has suffered remarkably little physical harm during the intervention, the Turkish force have been instructed exercise the greatest restraint except when resisted with violence that time the area was faced with a much reduced but nevertheless substantial stock of tourist accommodation bereft. The loss in Famagusta district was concentrated in Varosha in, but Kyrenia districts lose accommodation mainly in small hotels in remoter parts of the North Cyprus coasts. After a period of time a main task was to make repairs to existing tourists installation and to carry out a small amount of additional building, and to solve the problem of the provisional expropriation so that tourism could and start up without delay, it also sought to remedy the Turkish Cypriot lack of experience in tourism by setting up a

joint Cypriot /Turkish company to take control of a number of hotels, generally the largest ones. Its role was to channel financial support for tourism for the benefit of the nascent North Cyprus tourism industry. The company that was formed by the ministry of tourism was Cyprus Turkish Tourism Enterprises Ltd. Another solution to start up the tourism was the government at that time; to deal with some of the smaller hotels, the government tried to find Turkish-Cypriot entrepreneurs from Britain, especially those in business relevant or related to tourism, who would be prepared to lease and operate them.

The reason for the minute number of tourists from other countries other than Turkey are not surprising and were essentially the same, though in a more acute form, as those operative today, with the additional deterrent factor of North Cyprus having recently been a battle zone. There are several reasons why the Turkish contingent was so strong. First, there was the enormous interest in Cyprus generated by the Turkish intervention, which had captured the imagination of the whole nation. Then there was the large number of military and ancillary personnel serving in Cyprus after 1974 who could now be quite easily visited by their families and friends. Next; Cyprus was the one foreign country freely accessible to Turks in that age of growing austerity, because it was outside the rule allowing travel abroad only once

every two years. Closely related to this was the attraction to Turks of being able to buy items imported to Cyprus, which they could not find at home because of the restrictions on imports into Turkey. Finally, strange as this may seem, there were at that time in Turkey few hotels really designed for Turks (as against foreigners) holidaying at home and Cyprus filled the gap for middle class people of sufficient means.

2.4 TRNC PLACE IN THE WORLD TOURISM: -

North Cyprus tourism developing fast, attaining a record level of 25% among OECD countries. Its the country with highest rate of increase of tourism revenue and important progress has been noted in improving the supply capacity (bed+t transportation means) to meet the increasing demand. In raising the capacity of supply the environmental considerations must not be ignored. TRNC share in world tourism is very small when compared with shares of other countries, and the reason for that is; the political situation, where the TRNC does not enjoy full diplomatic recognition internationally. TRNC has indeed a great tourism potential. Therefore, retinal and consistent measures are needed to make use of this potential. With the expansion of the capacity to meet the needs of every level of income, improvement of the quality of services, and establishment of the flexible price system taking into

consideration the level of income of tourists, an efficient tourism can be attained.

2.5 PRESENT SITUATION OF TOURISM IN TRNC:-

During the years 1986 and 1990 period it has not been possible to achieve the desire progress in Tourism. Although with regard to infrastructure, it has a great potential, political and general economic problem have prevented the tourism industry from being developed to the desire level. The number of bed certified by Ministry of Tourism was (3265) thousand in year 1977 and increased to 7774 thousand in 1995. During the same period, the number of tourist Establishment Accommodation increased from 46 to 93. In 1997 the bed capacity increased to 8,504 thousand with a number of tourists who came to TRNC reached to 53747 and left amount of 189.2 million dollar as a net tourism income. Tourism Infrastructure and Coastal Management Project is not going on as planned owing to local administrations and users not participating in financing of infrastructure efficiently and limited public financing. Despite positive developments in six plan period, still there are some problems that the Tourism industry suffer from, for example transportation (Air, Sea), bed capacity, technical infrastructure (Sewerage, roads, water, transportation), information and marketing, tourism Education and training, tour operator and agencies. In the

present situation there are 87 establishment and most of them been built in Kyrenia region. This increase in the number of Establishment shows an increase in the invesimcn1, therefore it's a good advantage for the country.

3. THE FACTORS AFFECT TOURISM INDUSTRY IN TRNC

There are some factors that affect the tourism industry in North Cyprus and these factors play a big role in decreasing the number of the tourist who like to visit North Cyprus, and as a result it will decrease the amount of the foreign currency that is earned from the tourists. These factors are shown as follow:

3.1.POLITICAL FACTOR:

This can be considered as one of the important factors that affect the tourism industry in North Cyprus from one side and the whole country from the other side. As we know the TRNC is not recognized by European Union as a separate country, and as a result of this we can see the bad economical situation that the North part suffers from, where we can find the high percentage of the inflation, unstable prices, Unemployment. Turkey only recognizes the TRNC as a country, and Turkey can be considered as the main factor that provides the TRNC with all the resources. For example Banks, products, investments. The political problem with the Greece side also affects the TRNC life. As we know from the critical situation since the war started in 1974 in which the Island has been divided into two, from that time the TRNC is still unknown or unrecognized place; so the advertising about the

TRNC still few and not enough, the number of the agents also small, International relations are limited, no direct planes can land or take off from here except from Turkey, and few numbers of firms are joined. So all these factors will effect the tourism industry in the TRNC and it will result a negative effect on the economy.

3. 2. ECONOMICAL ENVIRONMENT:

This is also can consider as one of the main factors that affect the Tourism industry in the TRNC. Again as we mentioned before European Union does not recognize the TRNC so this is one of the big problems that causes the bad economical situation in the TRNC. The economical environment factors that effect the tourism industry:

A- Market Size: As we know the market size in North Cyprus is so small with a few types of products, few markets, few number of Competitors or producers, few number of organizations and factories, few number of investment, and because its unknown or unrecognized country, so this is a big disadvantage for the economy.

B-Inflation: Inflation also one of the dangerous factors that the TRNC suffer from; were we can see that the percentage of the Inflation is rising up every day and in the last year it reaches to 120 % and this is not a small. This rising in the percentage of the Inflation also causes a decreases in the value

investment, and because its unknown or unrecognized country, so this is a big disadvantage for the economy.

B-Inflation: Inflation also one of the dangerous factors that the TRNC suffer from; were we can see that the percentage of the Inflation is rising up every day and in the last year it reaches to 120 % and this is not a small. This rising in the percentage of the Inflation also causes a decreases in the value of the Turkish Lira with an increase in the prices and this is a big disadvantages for the tourism season and for the economy as a whole.

C-Unstable of the prices: Because of the inflation the value of the Turkish Lira falls down against the foreign currency and as result of that the prices goes up every time; so this increasing in the prices always will cause an affect in the tourists, where the number of the tourists will decrease and they will prefer to spent their holiday in other country.

3.3. COMPETITION:

Is another factor that affects the tourism industry in TRNC. As we know- the TRNC is small Island in the Mediterranean Sea and it has a number of nighbours such as Greece, Turkey, Greece side, Lebanon, Israel, Egypt, and all these countries can be considered as the competitors who compete the TRNC tourism market. So from the point of view; the tourism industry and the government should work hard against these competitors so that to

encourage more tourists to visit and try to protect the tourism market in the TRNC and try to follow the economy of the develop ones.

3. 4. GOVERNMENT REGULATIONS:

The Government regulations can also be one of the important factors that affect the tourism industry in TRNC either by increasing the tax or custom. Since we know that government plays an important role in the improving and developing the country, so from the point of view the government should promote and encourage more number of tourists to spend their holiday in North Cyprus, encourage local and foreign investors to invest here without getting a high tax. The TRNC government usually gets a high rate of tax on imported and things also on the investments; for that reason the number of the investment here is small; so it's better that if the government try to reduce the high rate of tax on these investments, so that more investments can be invested in TRNC where it will help in improving the economy of country. Instead government should spend effort to build new activities and actions for attracting the people, for example horsing, golf grounds hunting, national parks, wildlife parks, museums and galleries, new roads, gardens. Such things will courage more people or tourists to come here to spend their holidays and the Government here should work very hard to do such activities because in the opposite of that the tourists will pay

money for these things and getting money especially foreign currency is big opportunity for the country and for the developing of its economy, since we know that TRNC suffers from a bad economical situation where the inflation which is one of the sickness of the economy occurs. So the tourism sector earns million of dollars from tourists and this amount of money that earned every year may help in the recovery of the country economy from that point the government should take care of this sector and try to spend more effort for that.

3.5.SOCIAL AND CULTURE:

Getting an idea about the social and the culture of any country is one of the objectives that the tourists aim to, where probably 50 % of them would like to have an idea about it. And since the TRNC social and culture is rich; so its a good advantage to make more tourists come here and as we know the North part is rich in its historical places such as the old wall in Nicosia, castles, museums, theaters, coasts and we should not forget that the Island has a mixture of English, Osmanli and peasants cultures this could be another advantage for the tourism. Also the individuals or the citizens has a rich culture either in their clothing or in preparing different type of a nice food, and this is an advantage to get more tourists to here. As we can see most of the tourists who comes here are nearly British because when they

came first here they analyze that the social habits and the culture is similar to their culture and social and in addition to that; great number of Cypriot people are living in England so these people has transmit all these habits, beliefs, values and attitudes to North Cyprus and this what make a large number of the English tourists to come here every year to spend their holidays or buy a house and stay here as a resident. But unfortunately some of the fanatics who believe in some ideas against their nationality and the theft accidents and killing; cause some trouble to the tourists where he don't feel safety. So from the tourism point of view this will reflect a bad idea about the culture and the social, and as a result it will affect the tourism, industry from one side and the whole country from other side.

3. 6. TRANSPORTATION:

It's one of the important factors that effect the tourism season in North Cyprus. As we know the northern part of the island is not recognized yet therefore no direct planes can reach here either from Europe or Middle East, so the planes or the tourists who comes from other countries should stop in Turkey, so the stopover Turkey makes the journey from England for example long, waste fuel, and increase in the cost, also tourists fare much worse, often having to spend many hours in a Turkish airports waiting for an onward connecting flight to reach North Cyprus and because the air travel to

North Cyprus is expensive, this must be a factor that keep the tourists number low. For that reason an international flights should take place with the other countries and flights from Turkey airports must be doubled to Ercan airport taking into the consideration the decrease in the ticket prices. This matter should be studied very carefully between the airlines companies and government so that to decide about the prices of the tickets to help more number of tourists to come here.

4. THE MARKETING MIX OF TOURISM IN TRNC

The marketing mix depends on the four Ps; product, price, promotion and Place. Here the object is to introduce and explain them in an iterated way that also serves for planning marketing strategy and tactics. The four Ps are:

4.1- PRODUCT: -Product usually covers the shape of what is offered to prospective customers; in other words, the characteristics of the product which is designed by the management decisions for example the size and the facilities of the hotel, presentation service of the product, the service element including training, attitudes and appearance of staff engaged in 'delivering' the product to the customers. In North Cyprns" there are lot of hotels in different places or cities and each hotel has its own facilities for example delivering the food or in the size of the hotel; number of rooms, beds, TV, casino, car rental etc. Lets give an example for some hotels in North Cyprus and see what are the facilities that they offer for the customers. The first example is JASMINE COURT HOTEL APT (****) this is one of the modern and impressive hotel complexes in North Cyprus, lying just to the west of historic Kyrenia including 143 room with 319 bed, rooms with telephone, T.V, video and music, swimming pool, minibar, safety deposit

box, air condition, central heating, beach and beach bar, car rental, casino, discotheque, mini market, fitness center, hair salon and nursery. All these facilities are advantages for the hotel to get more number of tourists to the hotel. Another example is the SALAMIS BAY HOTEL, which lies seven miles north Famagusta - close to the ancient ruins of salamis and considered as the largest hotel in North Cyprus. The Hotel contains 431 room with 960 bed, rooms with telephone, T.V .swimming pool, air condition, beach, beach service, discotheque/casino, conference hall, sea sport, tennis courts, hair salon, shoppingcentre, medical facilities, laundry valet services.

4.2-PRICE: - The price is very important and its usually denotes the published or negotiated term of exchange transaction for the product. Also invariably in tourism there is regular or standard price for the product. So to decide about the price is very difficult else when you decide for your price so you have to look for the other prices that the other hotels offer or get from customer so that to keep on the same level with them and not to lose more customers who may prefer to stay in a cheaper one. For example if you offer a high prices lets say 10 million per night so tourists may find it cheaper to stay in Turkey when he know that every thin is cheaper than here, for example fruits, vegetables, transportation's. So from the tourism point of

view you should select the suitable price those satisfy the customers and this price should be close to the price of your surrounding hotels either in North Cyprus or in the neighbor countries. Now here are some names for hotels with the price that they get or offer: -

PRICES PER NIGHT (\$)

HOTEL NAME	SINGLE	DOUBLE	
1-Lapethose (Nicosia)	25	20	with out dinner
2-Jasmin court (Kyrenia)	125	155	with all
3-Salamis (Magusa)	136	150	with all
4-Acapulco (kyrenia)	160	170	with all

4.3- PROMOTION:- Is the most visible variable of the marketing mix of the tourism this usually include advertising, direct mail , sales promotion, merchant, sales-force activities, public relation activity.these techniques are used to give information to help the customers decide whether to buy from

the producer or through a channel distribution. In North Cyprus the department of tourism usually form a groups and send them to Europe especially to Russia, France, Finland, Israel so that to give an idea about TRNC life, history, culture, tourism etc. And the reason for that is to inter a new market .In addition to the groups there are some agents in each Turkey, England, Germany who plays an important role for couraging the tourists from these countries to come here. And finally the tourism department used to join Festivals (FUARLAR) in different countries, these are shown in table (18).

4. 4- PLACE:- Northern Cyprus, the place on the earth so close to heaven , provides beauty a most hospitable welcome, with its friendly people, and its great natural beauty, which is unspoiled, unpolluted and uncrowded. There are miles of coastline with golden sands bathed in sunshine almost every day of the year. There is much of historical interest to reflect nine thousand years of history, and plenty of good hotels and restaurants which provide Mediterranean and International cuisine, not to mention simpler and cozier places to enjoy the many local dishes.

The island enjoys one of the healthiest and most pleasant climates in the world; the winters are short and warm, and the weather always predictable.

The unique climate of Northern Cyprus offers year-round opportunities for a perfect holiday. Rainfall is concentrated in December and January, and the average of the temperature is above 20°C for more than half the year. Cyprus is renowned for its wild flowers that carpet the island in spring and scent of orange, lemon and grapefruit blossom fills the air. All the Mediterranean fruits and vegetables are here in abundance, from olive to grapes. The Cyprus has had many different rulers over the centuries. The Assyrians, Persians, Roman, Byzantine, and Lusignans followed by Egyptians and the Ottomans. The coast of North Cyprus offers some of the finest and safest bathing in the Mediterranean. Although most holiday establishments have modern pools, the crystal clear waters of the eastern Mediterranean are wonderful for swimming, snorkeling, sailing and skiing. Most of the holiday complexes are situated near the picturesque ancient port of Kyrenia on the north coast, or Famagusta in the east. And finally the Britain's long-standing links with the Island ensure that English is spoken widely.

5. ADVANTAGES AND DISADVANTAGES OF TOURISM IN TRNC:

Usually the Tourism season has advantages and disadvantages that can be result from the tourists who stay in the tourism country. Listed below some of the advantages and the disadvantages:

5.1-ADVANTAGES:

5.1.1 PEACE PROCESS: The tourism usually increase the relations between the Countries it self and create good relationships between the people themselves and this relation may create or result in other relation such as International trade, exchanging technology.

5.1.2 EMPLOYMENT: The tourism season usually gives chances for part time and Full time jobs. In other word the tourism is important to an economy because it generates employment. Jobs are created in travel agencies, tour operators and other intermediaries who supply tourist services in both the generating and destination areas. Transport Companies such as airlines employs staff to serve tourists in both areas. Also jobs are created in the restaurants and in the hotels. Earlier, it was pointed that North Cyprus has some 12 thousand workers who involved in Tourism.

5.1.3-BALANCE OF PAYMENT: The tourism season in North Cyprus has a significant influence on the balance of payment. The tourists resident in North Cyprus will be making an invisible payment to the country since we know that the tourists usually spend more, stay longer at the destination, use more expensive transport and accommodation, so against these; they will pay a foreign currency which contributes to destination and International Balance of payment and this is a debit for the balance of payment account to North Cyprus. Earlier statistics showed that at the end of the year 1997, the net tourism income was (189.2 million US\$) and from the beginning of 1998 until the second of November it raised to 192.2 million US\$) so there is an increase by an amount of (3 million 0\$).

5.1.4-INCOME: Another advantage of the tourism, usually generated from wages and salaries, rent and profits. In a labor intensive industry such as Tourism, the great proportion is likely to be derived from wages and salaries paid to those working in jobs either directly serving the needs of the tourists or benefiting indirectly from the tourist's expenditure. Income will be greater in those areas which generates large number of tourists, where visitors tend to stay longer periods, where the destination attraction attracts an up-market or more free-spending clientele, and where there are many opportunities to spend. A destination such as TRNC, satisfies most of the over seas tourists

and attracting them to stay for longer time, even through the winter some tourists will blend's and forest will be continuing. Initially, existing properties may adapt to accomod attracted to the warm climate. A number of up-market resorts such as SALAMIS, JASMIN COURT, OLIVE TREE HOLIDAY VILLAGE provide good range of relatively expensive hotels; there also expensive shops and restaurant, casinos, night clubs and discos where the high spend tourists can be relieved of their money. Finally, the area is also well served with conference halls, which will attract the high - spend business tourists. It's important to recognize that While income may be greatest where wage level are high, and there is relatively little unemployment in the area, tourism may in fact be of Greater value in those areas where there are few other opportunities for employment.

5.1.5-INVESTMENT AND DEVELOPMENT: One factor that is helping to determine the success of tourism in a region is the level of the investment whether private or public, in the industry. Investment is something of a'chicken and eggs' situation. There may be an unwillingness to invest until a flow of tourists to the area can be demonstrated, while the area will in tum attract few tourists until they can see evidence of sufficient facilities to attract them. However, once tourism is shown to be successful in one area or a country; private developers, or government agencies and investors are

often willing to invest their money in that area, and the more investment is one step forward to the continuous development of that country from one side and its economy from the other side. But unfortunately, the relationship between tourism growth and economic is uneven in the North Cyprus, due to the factors of an increase in the rate of inflation, the ability of the country to diversify and attitudes to work among the local labor force, and the political situation; therefore the investment in North Cyprus includes a high risk.

5. 2- DISADVANTAGES:

The tourism season in North Cyprus has created a number of disadvantages for the country, these disadvantages can be shown as follows:

5.2.1-Environment problem (Physical landscape):-Is the most obvious effect of the tourism. The constructing of new buildings, hotels in North Cyprus has a great effect on environment, the establishing of these hotels where done over the green lands where a great number of trees been cut off and as more hotels are to be build so more damage to the green area. Visitors, but increasing number soon prompt the construction of new building, perhaps in tourists enclaves. The distinction between physical and social impact soon become blurred. There are debates on style ('traditional or modern?') and, appropriateness, and government may legislate against

aged excess; where old building become hotels, links with the past may be retained, albeit ironically, adding weight to the idea that tourism is 'a new kind of sugar; hotels may come to symbolize 'modernity' and as centers of entertainment, they are attractive, especially to the young,

Even from rural areas, and their use as conference centers often performs a similar function for older.

5.2.3-Price Increasing: The prices are becoming high when more tourists reach to the Island, and when their demand for the product become high so prices will automatically increase and this increasing in the prices will have a big affect on the citizens or individuals and as we know the Northern part of the Island is suffering from a bad economical situation where an increase in the prices is occurring every day and the increase in the rate of inflation cause this increase in the prices. So this will cause a big problem for the people who get low income or the rapidly increase in the prices might affect also middle income people where the people of the high income may not be affected by this increase, so they can buy any type of product that they like with out any problem. The best example for price increasing is the rent, for example in the previous time when the Near East University was not recognized or known the prices of the rent where low and after the university become recognized and when a large number of students came here

especially in Lefkosa area we saw that the prices of the rent were rapidly increased and this increase in the prices of rent is continuing and will be continue since more student will come to study in the university.

5.3.3 -Culture: In a country like Cyprus different types of tourists reach here every year either from England, Germany, France, Austria; all these carry with them different cultures and every one tries to give some pictures about his or her culture; so some people here might be pleased to see such cultures and find it good and by the time being they might use it in the daily life. And wealthier local patrons. In such circumstances, 'unsuitable local people may seek entry, not only to hotels and similar establishment, but also to 'public ' beaches and other facilities hangs in social structures: For, habits, values, norms. Along with other forms of modernization.

5.3.4-Changes in family structure: Especially the young men who gained some independent source of income obtained from office jobs in tourists establishments, they use their income to form nuclear families and purchase consumer goods also they disregarded the elders, turned their backs on their families, stay away from their houses, refuse to obey their parents. Finally the effects of tourism on family structure vary according to the extent and type of tourism and the 'traditional' base and culture.

5.3.5-Increase the incidence of crime, prostitution and gambling.

5.3.6-Creates excess demands for some resources, such as electric power, water; where more amounts of electric power and water will be consumed in the hotels by the tourists. Powerful with more amount of fuel and solar that is used for the cars, this excess for fuel and solar will cause a pollution problem.

5.3.7-Contributes to disease, economic fluctuation, and transportation problem. More diseases may spread through the island from tourists for example aids. Also the great number of tourists may cause transportation problems; where the city or the Island will be crowded or full of cars and as a result more car accidents will happen. Finally since we know that the tourism is seasonally so this will cause a big effect on the economy where imbalance will occur. So demand for tourism promotes international understanding and peace.

6.MATERIAL AND EVALUATION OF COLLECTED DATA

To make the preparation of this study more easy some material have been used and studied with evaluation and analyzing to the data that also been collected as a main source for the study.

6.1. Materials Used in the Study: -

The main material that has been used in this study were taken and obtained from the Marketing department of Tourism, direct interviews, and statistical technique, such material have been very useful in this study, where it gives us information's about the whole Tourism industry in TRNC.

6.2. The Evaluation of the Collected Data: -

In this study, the data collected about the Tourism industry in the TRNC was analyzed by utilizing a statistical technique. The statistical of data flow have been analyzed, studied, and evaluated. An explanation and comment for the statistical data have been done in this study.

7. DISCUSSION OF THE STATISTICAL DATA

7.1 Explanations for Tables: -

1) Table 1 shows the tourists Accommodation Establishments by regions and categories for the year 1997. The table shows the total number of units and the total number of the beds in different categories. If we look to the table we can find that in Kyrenia region for example there is only one establishment with (* * * * *) and number of 288 beds, six establishment with (* * * *) and number of 1554 beds, twelve establishment with (* * *) and number of 1830 beds, twenty one establishment with(* *) and number of 1330 beds, twenty five establishment with (* *) and number of 886 beds. The total number'of units in Kyrenia is shown as 65 unit and total number of 5888 beds. On the other hand we analyze that the total number of units in Famugsta is less than in Kyrenia which is shown as 18 units with total number of beds 2360. Finally the total number of units in all the region and categories is shown as 87 and total number of beds is shown as 8504. So from the table

We can analyze that Kyrenia region has the biggest share in the No.of units which is shown as 65 units and the No.of the beds which is shown as 5888

bed, with the comparison to Famagusta and Nicosia where in Nicosia it's shown as total number of 4 units with 256 as total number of beds.

2) Table 2 shows the tourist Accommodation-Est Names with bed capacity for each by categories. For example Celebrity Hotel & Sato Lambousa and Palm Beach Hotel are (* * * * *) categories with bed capacity of 504 bed.

3) Table 3 shows the bed capacity in tourists Accommodation Establishment by the years 1987- 1997. If we look to table we can find that there is changing in the bed capacity from one year to another; for example in 1990 the bed capacity were 5414 and it increased to 6630 in the 1992, and 7469 in 1994 .In 1995 there was a decrease in the bed capacity of 7453, in the following years there was an increase in the bed capacity for example in 1996 it was increased to 7821 and 1997 it's 8504.

4) Table 4 shows the total number of arrival and departure by Mode of travel and years (1987-1997). If we analyze the table we can see that in 1994 for example the arrival total number who came by sea either to Kyrenia or Famagusta is 173277 where the total arrival who came by air is 288138, this means that most of the arrival prefer to come by plane rather than by sea. In 1997 an increase in the total of the arrival who came by the sea and this is shown as 200206 where the arrival who came by the

Plane or by Air is also increased to 337267. The total of the arrival who came by the sea or by air is shown as 375491 in 1990, and in 1991 there was a decrease in the total Arrivals and it's shown as 286249. In 1997 there was a great increase in the total arrivals with the comparison to 1996 and it reached to 537473 where in 1996 reached to 498188, so we have an increase by amount of 39283 arrival in 1997. On the other side of the table we can see the total departures either by sea or air, for example in 1995 it shows a total of 515075 where in 1996 the total decreased to 497107, so we have a decrease by an amount of 17968. For the following year 1997 the total was increased to 531945, in that case we have an increase by amount of 34838 with 45.3 %. So this means that 54.7 % from the tourist number prefer to stay in hotels, therefore the demand for hotels is higher than in the other Establishments by a percentage of 9.4 %.

5) Table 5 shows the number, total number and percentages of the tourists staying in tourists Accommodation Establishments by sex (Male, Female) and region in 1997. While we look to the table we see that for example in Kyrenia, the number of the Male is shown as 68929 and the number of the Female is 56301, so this means that the number of the Male is greater than the Female by a number of 12628 and percentage of 14.6 %. The total of both Male and Female is shown in different region looks as 111077 with

percentage of 57.3 % and the total for Female is shown as 82669 with the percentage of 42.7 %. The general total is shown as 193746.

6) Table 6 shows the number, total number and the percentages of the tourists in tourist Accommodation Establishment by Occupation Groups and region for the year 1997. If we look to the table we can see for example that; a percentage of 14.8 % from the total number of the tourists are professionals, where 13.2 % are for services with total of 25657, and 8.5 % for sales work with 12.8 % for clerical work also 8.3 % for the student with total student of 16065. So the percentages are different from one occupation

to another.

7) Table 7 shows the number of the Tourism and Travel Agencies being used the Tourism industry by the years 1987-1997. A changes in the number of Tourism and Travel Agency can be analyzed; for example in 1987 the number is shown as 87, where in 1994 the number of the this show how Tourism and Travel Agents reached to 155, and important the tourism industry become for the TRNC. In 1996 again we had an increase in the number of Tourism and Travel Agencies shown as 161. Finally in 1997 there was a decrease in the number shown as 156. The decrease in the Agents numbers will have an effect in the tourists number, where in order to increase the number of the tourists, we have to increase the sales promotions

such as Agents, advertisement; so that we give an idea about our country and the tourism product which will be offered for the tourists. So from the tourism point of view the sales promotions is very important for the tourism industry in any country.

8) Table 8 shows the amount of the Incentives paid to the tour operator for the printed materials according to the Tourism Industry Incentive by the years 1987-1997. The paid amount is different from one year to other for example in 1987 the amount paid is shown as 183,140.28 (TL). In 1988 we have a decrease in the amount paid and it's shown as 8,563.70 (TL) and if we look to 1995 we can see that the amount paid was 308,109.29 (TL) where in 1996 the amount shown as 128,647.98 (TL). So in this case we have a difference in amount of 179461.31 (TL) between the years 1995 and 1996. And finally the total of Incentives being paid has been found as 2,416,389.65 (TL).

9) Table 9 shows the Amount of the good bought by the tourism and travel Agencies with duty exemption according to the tourism industry Incentives law by the year 1987-1997. The amount of Goods bought is changing from one year to another. For example in 1992 the amount is shown as 162,454.30 (TL), where in 1994 the amount of goods bought is analyzed as 339,475.43 (TL), so this shows an increase in the number of tourists and increase in the

amount of goods bought in amount of 177021.13 (TL) with the comparison to 1992. In 1995 the amount also increased to 426,326.44 (TL), for the year 1996 we had a decrease shown as 293,431.66 (TL) with a decrease amount of 132894.78 (TL) with the comparison to 1995, and in 1997 we had a small increase reached to 392,319.85, so we had an increase by amount of 98888.19 (TL) with the comparison to 1996. Finally the total Amount of Goods Bought with the duty Exemption is shown as total of 2,943,416.28 (TL)

10) Table 10 shows the number of Tourists Guides by the years 1974-1997

With the total number of Tourists Guide for the years between 1974-1997.

The number of tourist guides seems to be small in the 1974 where it was shown as 26, and we know that before this period there was a war with the other side of the Island therefore the Island needed a long time to take it's usual form after the ware, and until the tourism has to be born .In 1980 the number was increased to 53 Guides, where in 1987 it increased to 43 Guides, and a great increase in the number of the Guides was analyzed in the 1993 in which the number reached to 118 Guides. In the following years the number decreased, for example in 1996 it was 23 and in 1997 it was 18 Guides. Finally the total number of Guides is shown as 665, and in my opinion this number could be small with the comparison to number of the

Hotels and Tourists; for that reason the number should be increased so that to satisfy the tourists.

11) Table 11 shows courses that organized by the tourism industry and the number of Trainees Qualified by the years 1990-1997. In 1990 we can see from the table that an elementary training courses were held with a number of 35 Trained Corsairs, where in 1992 teachers training courses were held with also 35 Trained Corsairs, and in 1994 Fresh-up courses been held with 46 Trained Corsairs. For the year 1997 different courses were held such as Frontoffice Elementary, Service Training, Kitchenette Training, with a number of 433 Trained Corsairs. Finally the table shows a total of 569 Trained Corsairs. So here we can see that the number of trained corsairs is very small, therefore we should train more number of people so that to satisfy the customers and increase the standard of the service.

12) Table 12 shows the number of the Employees in the Tourists Establishment for the years (1995-1996-1997). If we look to the table we can see that in 1995 a number of 2177 employees have been worked in 78 Establishment (Hotels, Hotel -Aprts, and other), where in Guest Houses we have employees number of 50, they are distributed in 15 Guest-Houses, and in restaurants we had 1946 employees who worked in 605 restaurants, and in Travel Agencies we have 408 employees who have been working in 164

Travel Agencies. From the other side if we look to 1997 we can see that there is an increase in the number of the employees, and this results from the increase in the number of the Establishments, for example the number of the employees in the Hotel and Hotel-Apts and others is shown as 2757, and in restaurants is 2109. The table shows increase in the total number the employees from 1996 to 1997, the increase is shown as 244 employees, where the total in 1996 is 5075 and in 1997 the total is shown as 5319 employees. So from the tourism point of view, an increase in building of the establishments and investing in the tourism industry; will give a good opportunity for more employers to work, and as a result this will help in solving the problem of the unemployment which is considered as one of the **factors that effect the economy as a whole.**

13) Table 14 shows the Water and Electricity consumption of Tourists Accommodation Establishment by Categories in the 1997. If we analyze the table we can see that in the (* * * * *) five star Hotels, the electric consumption is shown 2,277,685 (kWh) and in the (* * * *) four star the consumption for electric is shown as 8,384,408 (kWh). On the other side the water consumption is shown as 154,500 (tons) in five star Hotels(* * * * *), where in the four star(* * * *) Hotels the consumption is shown as 160,760 (tons). Finally the table shows the total of the water consumption as 684,243

(tons) and electric consumption in all Accommodation-Establishment as 21,988,883 (kWh). And as a result we can find that most of the water and electric consumption is consumed by the(** ***)and the(* * *) Establishments; for example in (* * *) the consumption for the electric is 7,789,135 (kWh), where in(* *) the consumption is 2,036,172 (kWh), so this means; we have a great difference in the amount (kWh) of electric consumed in the two

Establishment shown as 5752963 (kWh).

14) Table 14 shows the Net Tourism income by years 1987-1997 in (Million Dollar \$). If we look to the table we can see the net tourism income has been changed from one year to another, for example in 1990 the net tourism income was 224.8 (\$),wherein 1992 there was a decrease in the net tourism income shown as 175.1 (\$). In 1995 we had an increase in comparison to 1994 by amount of 46 million dollar, where the net income in 1994 shown as 172.9 million dollar and for 1995 is shown as 218.9 million dollar. For the following year, the net tourism income fall from 218.9 (\$) to 175.6 (\$) in 1996 by amount of 43.3 (\$). In 1998 we had an increase in the net tourism income reached to 189.2 (\$). So from the tourism point of view; the tourism industry plays an important role in improving and developing the economy of the TRNC, and for that reason more effort should be done either by the government or the public sectors to keep this sector working since we know

that it's the important source that provide the economy with the foreign currency and for the reason of the worst economical situation in the TRNC.

15) Table 15 shows the Income from tourism and balance of foreign trade.

In 1996 the total income in foreign currency amounted to 316.4 million US Dollar. Income from exports was realized as 70.3 million \$ and net tourism income from tourism amounted to 175.6 million\$. The share of the tourism sector in the total foreign currency income was 55.5% and in comparison to income from exports 249.1 %. It's shown that the sector's share in the total income of foreign currency is 56.9 % in the year 1997.

16) Table 16 shows the Revenue from Foreign Tourism and Expenditure. Revenue from external tourism in 1995 amounted to 383.7 million US\$ and expenditure to 125.3 million US \$ and thus a surplus of 258.4 million US \$ was realized. Due to the decrease in the number of the tourists in 1996, the net income from tourism dropped to 220.9 million US \$, and it's estimated that the net income from the student who are coming to North Cyprus will be nearly about 10 % of the total net income from tourism.

17) Table 17 shows the Position of the Tourism Sector in the Gross Domestic Product (GDP). The added value of the tourism sector at constant prices amounted to 210.9 million US \$ in the year 1996. This represents a drop of 13.4 % compared to 1995. The share of the sector in the Gross

Domestic Product (GDP) was realized as 2.8 % (at constant prices). It's **estimated that in the year 1997 the added value of the sector at constant prices of 1997 will amount 229.1 millioun TL and it's share iu the GDP is expected to be 3.0 %.** The rate of growth iu the tourism sector according to **the national income estimates will be 8.6 %.**

18) Table 18 shows the Name of the Festivals and the years, which the Tourism sector has joined. For example in 1998 they have joined the Holiday Show in Manchester -England, and in Germany they also joined **Hamburg Tourism fuari in 1991, 1993, 1994, 1995,1996, 1997, 1998.**

19) Table 19 shows the Balance of Payments for the economical activities in **the TRNC for the years 1990-1995.** The balance of payment shows a current accounts for the foreign trade as 54.5 million US \$ for exports in 1993, and 363.9 million US\$ as imports. So we can find that the amount of imports is greater than the amount of exports, with a trade balance of -309.4 million US \$. Foreign Aid and loans by Turkey are shown as 22.1 million US\$ in 1994, and 28.4 million US\$. Other capital movements net is shown as - 107.9 Million US \$ and - 105 million US \$ so there is an increase in the **net movements by -0.5 million US \$.** A decrease in net errors is shown as 1.9 million US \$ in 1995 with comparison to 1994 where its shown as --0.8. So in that case we have a decrease by an amount of 1.1 million US \$.

8. PROBLEMS ACCESS TO NORTHERN CYPRUS: ·

AND RECOMMENDATIONS

8.1 Problems Access To TRNC: ·

There some problems that access in the northern part of the island which effect the tourism sector. Listed bellow some of the problems:-

A)Water shortage and scarcity of the fresh water: The North Cyprus is suffering from a shortage in water especially in sununer time and this is when the tourism season started, in the addition to the scarcity in the fresh water which is not availa~le every where; so such problems may effect the tourism season. For that reason fresh water should be saved, for instance by recycling wastewater for uses at tourist's installation rather than hnman consumption. Also tourists installations need to be connected to sewerage treatment plants to prevent seepage from pits to aquifers and brothels.

B) Pollution.of the sea: The north coast in particular suffers from the detritus deposited by the predominant anticlockwise current in the Eastern Mediterranean which carries waste matter from coast of Egypt, Israel, Lebanon, and Syria to the bottleneck between Cyprus and Turkey. The sea is threatened by the discharge of industrial and domestic waste and by **agrochemical.**

C) Architectural Pollution: The strictest controls need to be applied to the design of all tourists installation so as to ensure the greatest possible 'harmonization' and least possible conflict with the environment.

D) Imbalance in the geographical distribution of tourism: Provision needs to be made centrally for facilities designed to attract more tourism to areas other than the coast, for instance to the mountain, which, outside the high summer, offer good conditions for walking and nature observation.

E) Transportation: The most important problem that may, effect the tourism season in the North Cyprus. As we mention that the TRNC is not recognized; therefore direct planes are forbidden to land or takeoff in addition to the transpiration inside the country where we can see that the roads are small and danger and the busses are leaving early the city center.

F) Environmental Constraints: The damaging of the environment will Effect also the tourism season to North Cyprus, where the agricultural lands and the green and the natural places have been killed and damaged and it is placed with buildings. So government should try to protect the Environment which is the future of the tourism in North Cyprus.

G) The air travel to North Cyprus from countries other than Turkey is unsatisfactory; where there are no direct planes can land or take off either from Europe or Asia or other regions in TRNC Airport.

H) The flight component constitutes too great a proportion of the cost of a holiday to the individual tourists or package tour operator.

8.2 RECOMMENDATIONS: -

After this study about the tourism industry and the problems that face this industry I would like to suggest some recommendations or solutions to the problems so that to improve the tourism industry in TRNC; the **recommendations are shown as the following: -**

1) To enable the developing of the tourism in North Cyprus a great effort should be exerted to establish direct link with European and Middle East

countries.

2) Transport of tourism must be doubled by additional flights either from Istanbul or Ankara, Antalia, Izmir, Adana to Ercan airport because Turkey is the only important bridge that connects TRNC with other countries. So for the present situation of TRNC this solution must be done with or studied between the government and the air lines companies taking into the consideration of decreasing the prices of the tickets so that to increase the

number of the tourism.

3) In the fixing of prices in respect of tourism and related sectors; care Should be taken so that to increase the competitiveness of our prices in the international fields and ensure that the development of the sector is not **adversely affected.**

4) Healthy relations should be established with tourism circles of foreign countries where they could meet each other to exchange methods or ideas of how to protect the tourists from illness so this relation could be more useful **in the future.**

5) The Government should take the matter of the tourism more seriously and try to encourage the tourists by building new activities, create new actions. For example sport activities, national parks, wildlife parks, gardens.

6) Raising the bed capacity, because the bed capacity of TRNC is insufficient in meeting demand and all efforts that have been concentrated **on raising the bed capacity.**

7) Training institutions for tourism must be exist so this reached great dimensions and the level of development of countries is judged with the efficiency of their communication, and the country with out efficiency **communication means as paralyzed.**

8) Blaming tourism for deforestation; political situation, inflation or other reasons will serve no purpose, in stead we should fight these factors.

9) To understand the prospects for the tourism sector; attention should be **given to the demand and the choice of the consumers.**

10) Increase in the advertising and promoting for tourism sector must take **place especially in Europe and Asia.**

11) Solutions for both water and electric problems should be taken into

Consideration in a serious way.

12) Efforts should be made to prevent rubbish being thrown into the sea from the ferries and also from private small boats based in Nat to result qualified and professional personnel staff who will provide more efficient and profitable business with greater customer satisfaction, helping to increase customer loyalty, improve the standard and efficiency of the service and finally through increasing staff motivation, training can improve staff loyalty and recruitment, who will be tourism profession and involve in the tourism sector.

13) Tourism sector should form some kinds of exhibitions at least twice a year and invite tourism managers from different countries so that to give idea about our country. From otherside the tourism department in North Cyprus should also join or participate in the international exhibitions, conferences, and festivals so again to give picture about the country tourism, which will benefit the future of the TRNC.

14) External promotions (tour operator, retail travel agent, agencies, and incentive travel organizers) must be sufficient and advertising should be increased especially in Europe and Middle East countries so that to make the people of these countries recognize our country.

15) Active publicity campaign must be launched and continued in cooperation of the state and the private sector.

16) Improvement in the quality and services should be done so that to Satisfy the needs of the tourists.

17) Environments should be protected from any poisons or pollution so that to keep our country cleaned, beautiful, air fresh available. Always to have utmost regard for the environmental constraints and to ensure that these are not subverted.

18) Accommodations must be properly placed in the regional plan. Hotels are permanent structures and grace the landscape for long time.

19) Governmental consideration should be given for reduction or eliminate of taxes to help the financial success of the resort venture.

20) The private sector must deem an investment in a tourist facility Attractive from standpoint of financial return.

21) Roads, highways should be improved and repaired, where we can see that all the roads here are only two sides and this causes much of the accident. Improving road frontier posts, road sign systems, extending their capacity to ensure smoother crossing, organizing easier movement of in- and outgoing tourist flows, and lambs should be fixed on the high way roads

because when driving from Lefkosa to Kyrenia we can analyze that the road is very dark and this may cause many accidents in the road.

22) Providing adequate airport services and installations to meet demand.

The rapid progress of technology in air transport makes reasonable forecasts

possible.

23) Extending car-hire services (with and without drivers) for tourists who

arrive by air or sea.

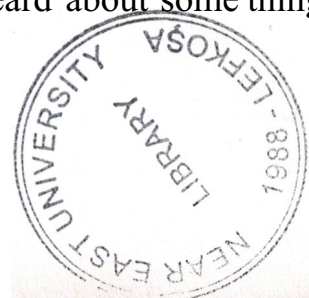
24) Increasing the number of the tourist guides in the hotels so that to serve

the tourists.

25) To keep the tourism season continuing in winter; a winter activities should be build. For example skiing grounds swimming pools.

26) More recreational activities must be established or build. For example golf grounds which is not available in North Cyprus, horsing, diving, hunting clubs may also be build so that to bring more number of tourists. In addition to the natural places, gardens, Lakes, theme parks heritage sites and centers. All these things will encourage a great number of tourists to **visit North Cyprus and as result we will be benefit from them.**

27) Satellite link and other advance technology should be utilized to improve radio and television cast so that the transmission of the radio can reach to the neighbor countries and as result these countries will heard about some thing



which is called North Cyprus, and also television will play big rule in introducing our country as a tourists place. The need of exchange information among countries haorth Cyprus harbors.

28) Informal tourist's establishments should be brought under central control because it appears that municipal control allows these principles to be subverted. Some of the significant culture sites in North Cyprus lie on or near the coast and require particular protection from the encroachment of tourist's installations.

29) Balance in the geographical distribution must be followed and done Provision need to be made centrally for facilities designed to attract more Tourism to area other than the coast, for instant to the mountains, which Outside the high summer, offer good conditions for walking and nature observation.

30) It's also necessary to protect and enhanced the culture resources of the Region and the integrity of manmade items such as historic towns and buildings, archaeological relics and so on.

31) Consideration should also be given to the competition existing in the International tourism. The intensity of competition depends on the facilities offered at each destination, resources of the destinations, ease of access and the price charged.

32) A master plans should be taken into the consideration every five or ten years for capable of adaptation so that to meet changing conditions; for example the future demand and supply components of what is supplied and **demand now and what will be the future market desire.**

1. CONCLUSION: -

The tourism industry in North Cyprus is playing an important role for the country as we saw, where it helps in the development and improvement of the economy, in addition to its importance in the balance of payments, where we can see that in 1997 an amount of 189.2 million US\$ has been received as a net tourism income. Tourism as a main economic factor will continue to be a basic priority sector and one of the main economic factors that will help in develop and improve the economical situation in the North Cyprus, so from the tourism point of view the government should take the matter of tourism industry more seriously, and try to encourage this sector more efficiently either by establishing new hotels or improving transportation, building new activities which will attract more number of tourists to visit North Cyprus, other activities like national parks, gardens, sport activities and actions. Although with regard to infrastructure North Cyprus has great potential, political and economic problems that might prevent the tourism sector from being developed to the desirable level. Sustainable tourism is still possible if proper environmental conservation consideration is given or taken by the government and the private sector, and the lack of the environment Sensitivity on the part of the government and private sector will

prejudice the future of the tourism in North Cyprus. As well, the government of the North Cyprus will play a stronger role in encouraging the growth of domestic and the international tourism as a mean of job creation, economic diversification, and source of foreign exchange. By both the Government and the private sector; I believe that North Cyprus depleted Nature and culture environment can be restored from the revenue generated from tourism, if the tourism properly managed. Blaming tourism for the deforestation, litter, inflation, politics will serve no purpose in the development of the tourism in North Cyprus; although we know that TRNC suffers from a bad economical and political situations. If tourism is not a passport to peace, it's at least a worthy effort bridge towards building the peace between all the nations in which every body like and wish to live in. However, unless tourism labor also begins to develop qualitatively with appropriate education and training, the progress of the industry may be at risk. So if our education system trains highly motivated, industrious, ambitious and knowledgeable people we can say that the tourism industry has successfully fulfilled it's responsibility, and the future of the tourism can meet its objectives moreover can be very effective. The success of overcoming bottlenecks in Tourism lies in the Educational. of personnel who **are going to plan, manage, and to serve.**

TABLES

(Tourist Accommodation Establishments by Categories)

- 1997 -

**

(Name of the Establishment)	(Bed Cap.)	(Name of the Establishment)	(Bed Cap.)	(Name of the Establishment)	(Bed Cap.)	(Name of the Establishment)	(Bed Cap.)
Domie Hotel	340	Mare Monte H.	188	Golden Bay H.	72	Yeni Anadol O.	44
K.Jasmine C.Hotel & C.	392	Dorana Hotel	66	The Ship Hotel	70	Atlantis Hotel	31
Olive Tree D. H.V.	240	Grand Rock H.	128	Riviera Mekamp	68	Hotel British	36
LA Hol.C.	224	Deniz Kızı H.	114	King's Court	56	Socrates Otel	36
Kyrenia Oskar C.	250	Club Güzelyali	88	Manolya Hotel	96	Nostalga Hotel	24
Deniz Royal	108	Club Z	100	Top Set Bung.	54	Sidelya Hotel	24
Salamis Bay H.	960	Club Simena	52	The Villa Club	62	Silver Waves O.A.	40
Park Hotel	180	Club Lapethos	38	The Hideaway H.V.	38	Marmaris H.Apt.	20
		Hotel Liman	144	Anbelia Village	144	Green Olives	24
		Acapulco Tatil K.	30	Kasgar Court	30	M.Savarona Bung.	54
		Riverside H.V.	562	Green Karmi T. K.	72	Sendeniz Bung.	38
		Onar H. Village	194	Espril H. Apt.	86	Sunny Beach Bung.	45
		Minoza Hotel	76	Altunkaya & Armonia	88	Club Tropicana	32
		Bogaz Hotel	102	Alperhan H. Apt.	42	Şerif H. Apt.	48
		Hotel View	80	Hilarton Village	52	Harbour Scene H.	30
		Merit Cy. Gardens F.	112	Pia Bella Hotel	72	Life H.Apt.	38
		Sema Otel-Apt.	198	Bellapais Gardens	34	Bristol Hotel	36
		Saray Hotel	44	Sunny's Hotel	44	Paradisia Court	44
			120	Green Coast Bung.	74	Rose Gardens	36
				Primary H. V.	48	M. Kaan H. Apt.	60
				Pine Bay Club	28	La Sista H. V.	40
				Sea Side H.Apt.	68	Müftüzade O.Apt.	46
				Long Beach	102	Fian Bung.	20
						Five Fingers Bung.	20
						Ergenekon Hotel	20
						Panorama Otel	20
						Altun Tabya Otel	32
						Granel Hotel	40
						Vazaro Hotel	90
						Portofino Hotel	36
						Holiday Apt. H.	30
						Dagli H. Apt.	22
						Blue Sea Hotel	28
						Hotel Lapethos Nic.	78
						Soli Inn	30
						Güzelyurt Otel	28
							36
							1320

18

2486

23

1500

TABLO 3

(Bed Capacity in Tourist Aecom. ~st. by Years)
1987-1997

(Year)	(Bed Capacity)
1987	3,779
1988	3,917
1989	4,338
1990	5,414
1991	6,012
1992	6,630
1993	7,017
1994	7,469
1995	7,453
1996	7,821
1997	8,504

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TABLO 1

(No, of Tourism and Travel. Agencies by Years)

	1987-1997
(Year)	(Tourism and Travel Agency)
1987	87
1988	110
1989	121
1990	111
1991	122
1992	125
1993	137
1994	155
1995	164
1996	161
1997	156

TABLO 8

Amount of Incentives Paid to the Tour Operators for The Printed Materials
According to the Tourism Industry Incentive Law by Years)
1987-1997

(Year)	(Incentives Paid for the Printed Materials)
1987	183,140.28
1988	8,563.70
1989	152,023.19
1990	441,707.49
1991	210,653.83
1992	330,730.55
1993	201,392.84
1994	149,154.50
1995	308,109.29
1996	128,647.98
-1997	302,266.00
(fotal)	2,416,389.65

TABLO 9

(Amount of Goods Bought by the Tourism and Travel Agencies with Duty Exemption According to the Tourism Industry Incentive Law by Years)
1987-1997

(Year)	(Amount of Goods Bought with Duty Exemption)
1987	
1988	76,823.21
1989	483,426.42
1990	281,945.34
1991	124,558.41
1992	162,454.30
1993	362,655.22
1994	339,475.43
1995	426,326.44
1996	293,431.66
1997	392,319.85
(Total)	2,943,416.28

TABLO 10

(No. of Tourist Guides by Years)
1974-1997

(Year)	(No. of Tourist Guides)
	26
1974	
	25
1975	
	15
1976	
	20
1977	
	21
1978	
	46
1979	
	53
1980	
	46
1981	
	43
1986	
	43
1987	
	43
1989	
	52
1991	
	118
1993	
	73
1995	
	23
1996	
	18
1997	
(Total)	665

Courses Organised by the Tourism Department and the No. of Trainees Qualified by Years
1990-1997

(Year)	(Courses Held)	(Trained Coursearies)
1990	(Elementary Training Course)	
1991	(Teachers Training Course)	
	(Cropier Training) (Frontoffice Elementary) (Elementary Kitchenette Training) (Elementary Service Training) (Animation & Make-up) (Drowning & First Aid)	
	(Management Inside Training Course-Service,Housekeeping,Frontoffice,Kitchen)	
	(Total)	

(No. of Employees in Tourist Establishments)
(1995-1996-1997)

	1995	1996	1997	Total
1. Hotels	100	100	100	300
2. Restaurants	100	100	100	300
3. Bars	100	100	100	300
4. Clubs	100	100	100	300
5. Casinos	100	100	100	300
6. Other Tourist Establishments	100	100	100	300
Total	600	600	600	1800

TABLO 13

(Water and Electricity Consumption of Tourist Accommodation Establishments By Categories)

1997

	*****	****	*** ?	**	*	Çoklu
11111111	Z	00	00	Z3	30	87
00000000	304	3000	10000	000	300	10000
11111111	12345678	12345678	12345678	10000000	10000000	10000000
11111111	12345678	12345678	12345678	10000000	10000000	10000000
11111111	12345678	12345678	12345678	10000000	10000000	10000000

TABLO 14'

(Net Tourism Income by Years)
1987-1997

(Year)	(Net Tourism Income - Million Dollar)
1987	103.5
1988	118.0
1989	154.9
1990	224.8
1991	153.6
1992	175.1
1993	224.6
1994	172.9
1995	218.9
1996	175.6
1997	* 189.2

*Gerçekleşmesi muhtemeldir (Estimated)

Kaynak: DPÖ

TABLE:15

FOREIGN TRADE AND TOURISM BALANCE

A	B		C	D	E	F	G	H
	I	J						
1	2	3	4	5	6	7	8	9
10	11	12	13	14	15	16	17	18
19	20	21	22	23	24	25	26	27
28	29	30	31	32	33	34	35	36
37	38	39	40	41	42	43	44	45
46	47	48	49	50	51	52	53	54
55	56	57	58	59	60	61	62	63
64	65	66	67	68	69	70	71	72
73	74	75	76	77	78	79	80	81
82	83	84	85	86	87	88	89	90
91	92	93	94	95	96	97	98	99
100	101	102	103	104	105	106	107	108
109	110	111	112	113	114	115	116	117
118	119	120	121	122	123	124	125	126
127	128	129	130	131	132	133	134	135
136	137	138	139	140	141	142	143	144
145	146	147	148	149	150	151	152	153
154	155	156	157	158	159	160	161	162
163	164	165	166	167	168	169	170	171
172	173	174	175	176	177	178	179	180
181	182	183	184	185	186	187	188	189
190	191	192	193	194	195	196	197	198
199	200	201	202	203	204	205	206	207
208	209	210	211	212	213	214	215	216
217	218	219	220	221	222	223	224	225
226	227	228	229	230	231	232	233	234
235	236	237	238	239	240	241	242	243
244	245	246	247	248	249	250	251	252
253	254	255	256	257	258	259	260	261
262	263	264	265	266	267	268	269	270
271	272	273	274	275	276	277	278	279
280	281	282	283	284	285	286	287	288
289	290	291	292	293	294	295	296	297
298	299	300	301	302	303	304	305	306
307	308	309	310	311	312	313	314	315
316	317	318	319	320	321	322	323	324
325	326	327	328	329	330	331	332	333
334	335	336	337	338	339	340	341	342
343	344	345	346	347	348	349	350	351
352	353	354	355	356	357	358	359	360
361	362	363	364	365	366	367	368	369
370	371	372	373	374	375	376	377	378
379	380	381	382	383	384	385	386	387
388	389	390	391	392	393	394	395	396
397	398	399	400	401	402	403	404	405
406	407	408	409	410	411	412	413	414
415	416	417	418	419	420	421	422	423
424	425	426	427	428	429	430	431	432
433	434	435	436	437	438	439	440	441
442	443	444	445	446	447	448	449	450
451	452	453	454	455	456	457	458	459
460	461	462	463	464	465	466	467	468
469	470	471	472	473	474	475	476	477
478	479	480	481	482	483	484	485	486
487	488	489	490	491	492	493	494	495
496	497	498	499	500	501	502	503	504
505	506	507	508	509	510	511	512	513
514	515	516	517	518	519	520	521	522
523	524	525	526	527	528	529	530	531
532	533	534	535	536	537	538	539	540
541	542	543	544	545	546	547	548	549
550	551	552	553	554	555	556	557	558
559	560	561	562	563	564	565	566	567
568	569	570	571	572	573	574	575	576
577	578	579	580	581	582	583	584	585
586	587	588	589	590	591	592	593	594
595	596	597	598	599	600	601	602	603
604	605	606	607	608	609	610	611	612
613	614	615	616	617	618	619	620	621
622	623	624	625	626	627	628	629	630
631	632	633	634	635	636	637	638	639
640	641	642	643	644	645	646	647	648
649	650	651	652	653	654	655	656	657
658	659	660	661	662	663	664	665	666
667	668	669	670	671	672	673	674	675
676	677	678	679	680	681	682	683	684
685	686	687	688	689	690	691	692	693
694	695	696	697	698	699	700	701	702
703	704	705	706	707	708	709	710	711
712	713	714	715	716	717	718	719	720
721	722	723	724	725	726	727	728	729
730	731	732	733	734	735	736	737	738
739	740	741	742	743	744	745	746	747
748	749	750	751	752	753	754	755	756
757	758	759	760	761	762	763	764	765
766	767	768	769	770	771	772	773	774
775	776	777	778	779	780	781	782	783
784	785	786	787	788	789	790	791	792
793	794	795	796	797	798	799	800	801
802	803	804	805	806	807	808	809	810
811	812	813	814	815	816	817	818	819
820	821	822	823	824	825	826	827	828
829	830	831	832	833	834	835	836	837
838	839	840	841	842	843	844	845	846
847	848	849	850	851	852	853	854	855
856	857	858	859	860	861	862	863	864
865	866	867	868	869	870	871	872	873
874	875	876	877	878	879	880	881	882
883	884	885	886	887	888	889	890	891
892	893	894	895	896	897	898	899	900
901	902	903	904	905	906	907	908	909
910	911	912	913	914	915	916	917	918
919	920	921	922	923	924	925	926	927
928	929	930	931	932	933	934	935	936
937	938	939	940	941	942	943	944	945
946	947	948	949	950	951	952	953	954
955	956	957	958	959	960	961	962	963
964	965	966	967	968	969	970	971	972
973	974	975	976	977	978	979	980	981
982	983	984	985	986	987	988	989	990
991	992	993	994	995	996	997	998	999
1000	1001	1002	1003	1004	1005	1006	1007	1008
1009	1010	1011	1012	1013	1014	1015	1016	1017
1018	1019	1020	1021	1022	1023	1024	1025	1026
1027	1028	1029	1030	1031	1032	1033	1034	1035
1036	1037	1038	1039	1040	1041	1042	1043	1044
1045	1046	1047	1048	1049	1050	1051	1052	1053
1054	1055	1056	1057	1058	1059	1060	1061	1062
1063	1064	1065	1066	1067	1068	1069	1070	1071
1072	1073	1074	1075	1076	1077	1078	1079	1080
1081	1082	1083	1084	1085	1086	1087	1088	1089
1090	1091	1092	1093	1094	1095	1096	1097	1098
1099	1100	1101	1102	1103	1104	1105	1106	1107
1108	1109	1110	1111	1112	1113	1114	1115	1116
1117	1118	1119	1120	1121	1122	1123	1124	1125
1126	1127	1128	1129	1130	1131	1132	1133	1134
1135	1136	1137	1138	1139	1140	1141	1142	1143
1144	1145	1146	1147	1148	1149	1150	1151	1152
1153	1154	1155	1156	1157	1158	1159	1160	1161
1162	1163	1164	1165	1166	1167	1168	1169	1170
1171	1172	1173	1174	1175	1176	1177	1178	1179
1180	1181	1182	1183	1184	1185	1186	1187	1188
1189	1190	1191	1192	1193	1194	1195	1196	1197
1198	1199	1200	1201	1202	1203	1204	1205	1206
1207	1208	1209	1210	1211	1212	1213	1214	1215
1216	1217	1218	1219	1220	1221	1222	1223	1224
1225	1226	1227	1228	1229	1230	1231	1232	1233
1234	1235	1236	1237	1238	1239	1240	1241	1242
1243	1244	1245	1246	1247	1248	1249	1250	1251
1252	1253	1254	1255	1256	1257	1258	1259	1260
1261	1262	1263	1264	1265	1266	1267	1268	1269
1270	1271	1272	1273	1274	1275	1276	1277	1278
1279	1280	1281	1282	1283	1284	1285	1286	1287
1288	1289	1290	1291	1292	1293	1294	1295	1296
1297	1298	1299	1300	1301	1302	1303	1304	1305
1306	1307	1308	1309	1310	1311	1312	1313	1314
1315	1316	1317	1318	1319	1320	1321	1322	1323
1324	1325	1326	1327	1328	1329	1330	1331	1332
1333	1334	1335	1336	1337	1338	1339	1340	1341
1342	1343	1344	1345	1346	1347	1348	1349	1350
1351	1352	1353	1354	1355	1356	1357	1358	1359
1360	1361							

[illegible]

(X) • Estimated number.

(X): Estimated number of

Source: I.R.N.C. Film Number: 1998 Year of transition page: 233

TABLE:17
The Position of the Tourism Sector
in the economy of TRNC

Years	GSYİH		Turizm Sektörü		Oran (%)
	Current Prices	Constant Prices	Current Prices	Constant Prices	
1991	4,013,496.4	7,082.0	195,160.0	178.2	4.9
1992	6,828,157.3	7,424.5	385,483.2	221.9	5.6
1993	16,297,966.1	7,144.0	1,140,742.1	235.0	7.0
1994	34,717,616.5	7,360.0	1,797,093.8	243.6	5.1
1995	63,281,198.5	7,637.7	2,746,901.1	210.9	4.1
1997 (xx)	116,476,177.1	7,764.0	4,904,495.1	229.1	2.0

(x) Constant prices

(xx) Expected realization

Source : T.R.N.C. Prime Ministry Planning Office
1998 Year of transition, page : 22 4

FESTIVALS JOINED BY TOURISM INDUSTRY YEARS: 1991-1998

	YEARS				1998
	1994	1995	1996	1997	
				JOINED	
Y FESTIVAL (BELGUEM)		JOINED	JOINED	JOINED	JOINED
ISM FESTIVAL (HELSINKI-FINLAND)					
TOURISM FESTIVAL (ViYANA-AUSTRIA)	JOINED	JOINED	JOINED	JOINED	JOINED
T MAN (MANCHESTER-ENGLAND)		JOINED	JOINED	JOINED	JOINED
RISM FESTIVAL (HAMBURG-GERMANY)	JOINED	JOINED	JOINED	JOINED	JOINED

Table - 19 Balance of Payments

(Million US \$)

	1990	1991	1992	1993	1994	1995
RENT ACCOUNTS						
Foreign Trade						
Exports (Fob)	65.5	52.5	54.6	54.5	53.4	67.3
Imports (Cif)	3815	301.1	371.4	363.9	286.6	366.1
Balance	-316.0	-248.6	-316.8	-309.4	-233.2	-298.8
Invisibles Account						
Tourism Revenues(Net)	224.8	153.6	175.1	224.6	172.9	218.9
Other Invisibles(Net)	74.8	68.4	118.3	83.8	56.1	67.6
Invisibles Account Balance	299.6	222.0	293.4	308.4	229.0	286.5
RENT ACCOUNT						
Balance	-16.4	-26.6	-23.4	-1.0	-4.2	-12.3
CAPITAL MOVEMENTS						
Foreign Aid and Loans	24.6	52.0	38.4	31.6	23.9	30.8
a) Foreign Aid and Loans						
by Turkey	22.5	49.6	36.8	30.1	22.1	28.4
b) Other Foreign Aid	2.1	2.4	1.6	1.5	LS	2.4
Imports by Waiver	169.9	113.1	147.2	160.7	136.1	151.6
Other Capital Movements(Net)	-169.3	-106.7	-143.9	-129.7	-107.9	-105.9
CAPITAL MOVEMENTS						
Balance	25.2	58.4	41.7	62.6	52.1	76.5
OVERALL BALANCE	8.8	31.8	18.3	61.6	47.9	64.2
CHANGE IN REVERVES	-6.5	-32.8	-16.2	-68.0	-47.1	-66.1
Increase(-) Decrease(+)						
NET ERRORS AND OMISSIONS	-2.3	1.0	-2.1	6.4	-0.8	1.9

Annual average exchange rates at dollar basis:

1990 1 US \$ = 2,618.98 TL

1991 1 US \$ = 4,199.67 TL

1992 1 US \$ = 6,896.25 TL

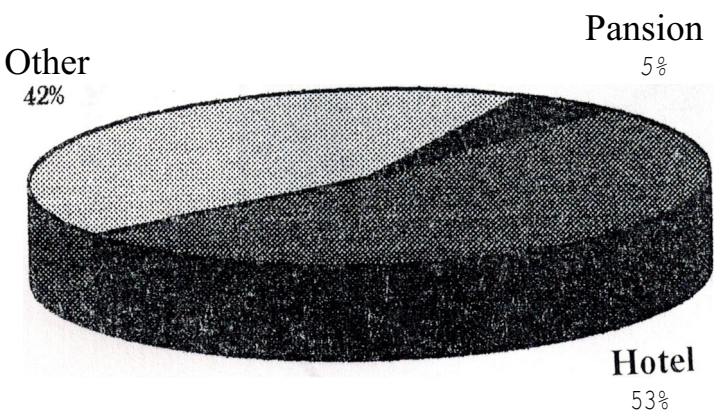
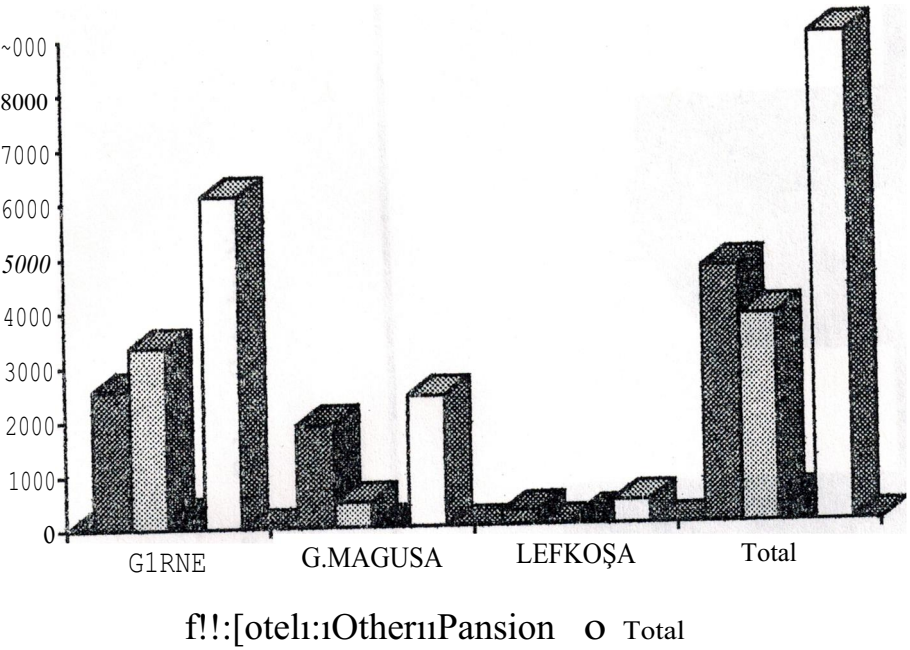
1993 1 US\$ = 11,106.99 TL

1994 1 US \$ = 29,915.67 TL

1995 1 US\$ = 46,554.51 TL

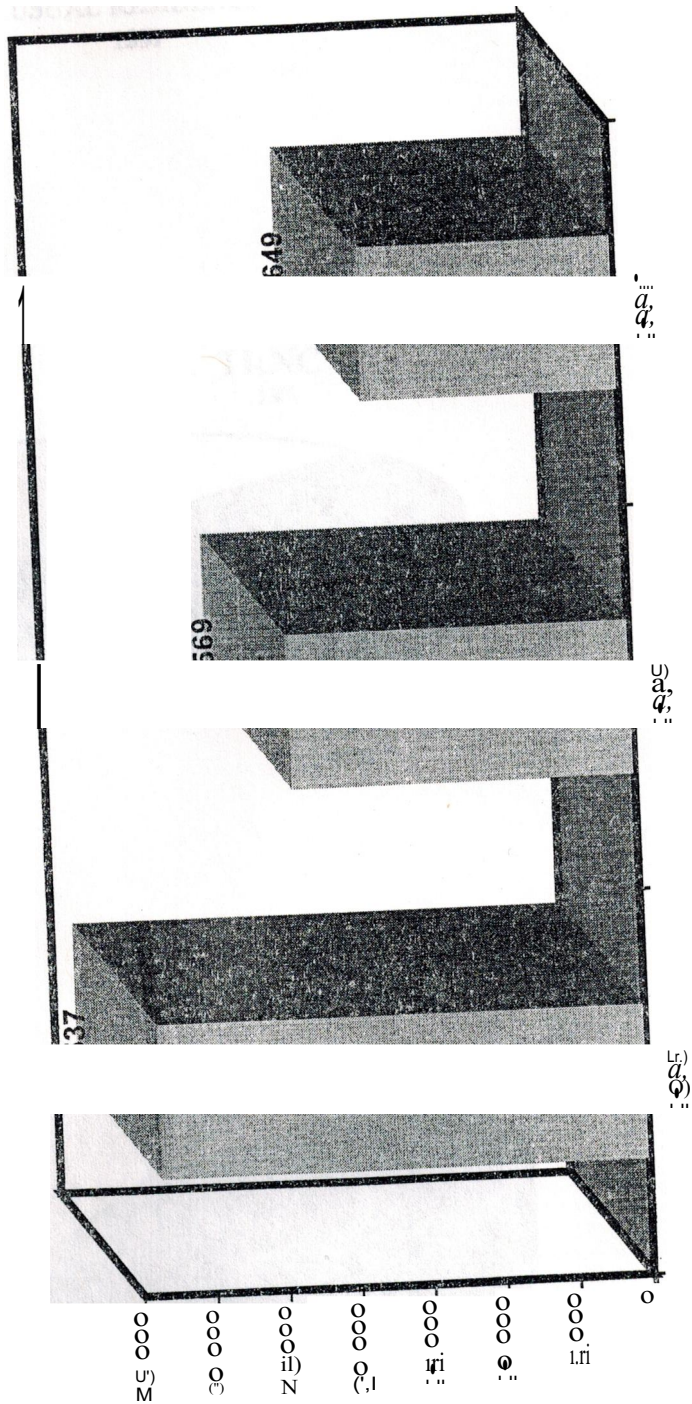
Source: State Planning Organization

GRAPHIC I
 BED CAPACITY BY TYPE OF ESTABLISHMENT
 1997



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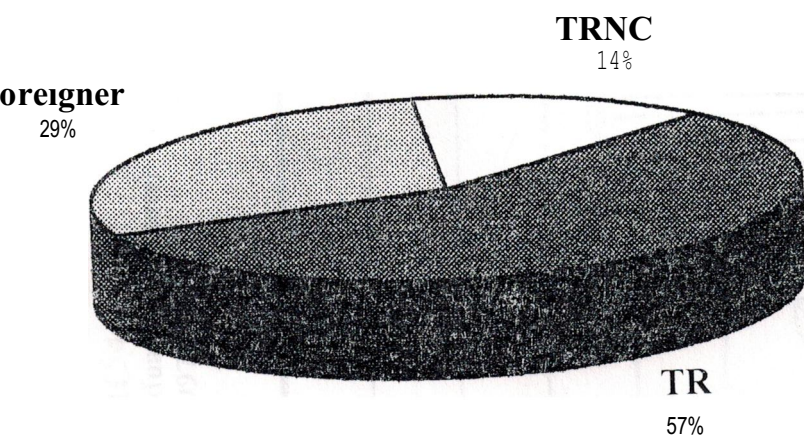
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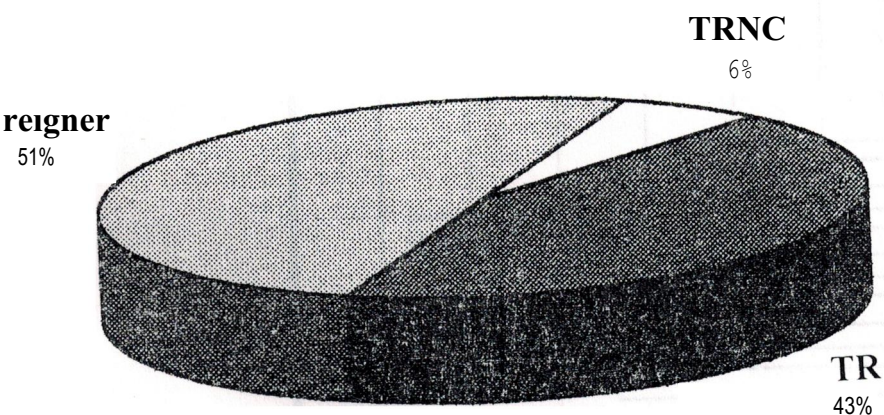
GRAPHIC 3

OF TOURISTS AND BEDNIGHTS IN TOURIST ACCOM. EST. BY COUNTRY OF
USUAL RESIDENCE
1997

(No. of tourists)



(No. of bednights)



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