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**THE EFFECT OF TURKISH TV SERIES ON INBOUND TOURISM
OF TURKEY: A CASE OF SAUDI ARABIA AND BULGARIA**

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***Abstract:** Traditionally, the majority of Turkish exports consist of manufactured products. But in recent years Turkey has earned an outstanding success in exporting TV series. One of the most important results of exporting TV Series is to increase demand of travel to Turkey which is known as film-induced tourism effect. Film-induced tourism is a relatively new field in the tourism concept. This new field is researching the impact of TV series and movies on tourism demand. With this new tool, countries have found a very effective way to promote their destinations. Turkey is a unique country in terms of geographic location, history and culture. This position provides a huge advantage and potential to develop a compatible movie industry. But transforming this potential into a comparative and sustainable advantage for a movie production depends on the capacity of cultural and creative industry of the country. This study examines the effects of Turkish TV series on Saudi Arabian and Bulgarian outbound travel to Turkey. In order to investigate the effect of Turkish made TV series on the tourism demand to Turkey, Saudi Arabia and Bulgaria are chosen as two countries located in the Middle East and in the Balkans respectively. The motivation of choosing those countries is that those TV series have very high ratings in both countries. The Chow analysis is conducted in order to observe whether the number of visits to Turkey increased or not. For this purpose, the data split into two data sets. While the former data consists of years of no broadcasting of Turkish TV series, the latter data composes of years of broadcasting of those series for both countries. It is observed that for Saudi Arabia, tourism demand to Turkey increases considerably after the broadcast of TV series.*

***Key Words:** Film-induced tourism, Turkish TV series, Creative industry, Turkey inbound tourism*

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1. Introduction

Tourism has been one of the major economic, social and cultural drivers worldwide especially over the past three decades. International tourist numbers has been constantly increasing, and jumped from 530 million in 1995 to 1.135 billion in 2014 (UNWTO, 2013; UNWTO, 2015). Depending on increased tourism demand worldwide, public and private sectors in destinations have been trying to increase the number of tourists and revenue. For this purpose, different marketing and promoting activities and tools have been used. Placement of a destination in movies and television (TV) series is a relatively new concept and is one of the most effective tools for promoting and marketing of a certain destination. Movies have a huge potential to raise awareness of a destination, to change the image of a city, region or country in a positive or negative way, and to affect the viewers' purchasing behaviors and turn them from being an audience to being a customer. Especially over the last two decades, the effect of movies on tourism has been known and successfully used by some destinations. Placement of a destination, which is also known as movie or film induced tourism, is referred to as a part of creative and cultural industry. Hollywood, the biggest cinema producer in the world, has an important power and capacity in cultural and creative industry and has been producing many movies that effected the tourist flow worldwide. Today, the effect of film induced tourism is known, and that is why countries and destinations try to produce specific movies or cooperate with big producers that would help them to increase their tourist numbers and tourism revenue.

Turkey has been one of the main tourism destination in the world and is the 6th most visited country with its 39.8 million visitors and 12th by means of tourism revenue with \$29.5 billion in the year of 2014 (UNWTO, 2015: 8). Turkey offers a variety of cultural, natural and historical attractions to its visitors. The richness of the Anatolian land by means of diversification of civilizations and cultures and its natural beauties, gives Turkey an important advantage. Yet, Turkey is still known as a sea-sand-sun destination and has not been successful in promoting its wide variety of richness to world. Recently, Turkish TV series play an important role to promote and represent the deepness of cultural, natural and historical resources and attractions to the world. Turkish TV series have reached over 400 million audiences in more than 75 countries. They are so popular especially among the Balkan, Middle Eastern and Central Asian countries. It is stated that the final episode of one of the most popular Turkish TV series "Gümüş", also known as "the Noor", was watched by 85 million people in the Middle East region. In these countries, it is possible to see broadcasting of a few different Turkish TV series at the same time.

The aim of this study is to investigate the effect of Turkish TV series on inbound travel to Turkey. For this purpose, Saudi Arabia and Bulgaria are chosen as two countries that Turkish TV series are so popular in. Yet, tourism development between Turkey-Saudi Arabia and Turkey-Bulgaria had not been so successful due to some political, historical and social obstacles and this is another reason that we chose these two countries. The findings of this study is important by means of, firstly, to contribute to tourism and movie relations and secondly, to show the effects of Turkish TV series on inbound tourism of Turkey which are getting more and more popular in many countries every year.

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2. Film Induced Tourism

Film induced tourism, is a specific pattern of tourism that derives visitors to see screened places during or after the production of a featured film or a television production (Roesch, 2009: 6). Film tourism, sometimes called movie-induced, is defined by Hudson and Ritchie (2006: 387) as 'tourists visits to a certain destination as a result of the destination's being featured on TV, video or cinema'. Films and TV can be pulling forces for potential visitors to visit a certain destination. The main role of films and TV is to generate awareness, desire and action to visit the screened region (Croy and Heitmann; 2011: 188).

Film induced tourism can happen in many different types. For some, it can be the sole purpose of the travel, for others, it may involve the participation in an organized location tour or the visitation of a very specific focal point from a particular scene (Roesch, 2009: 10). Although movies and TV series can be a tool for film induced tourism, there are some differences between them. Movies tend to be a one-off or limited experience for both the producers and the majority of viewers, whereas TV series have a longer screening and filming period. It keeps the region that the series is shot in viewers' mind and also creating a desire to visit the location. Viewers might develop an empathetic relationship with the story, characters and the region that they decide to visit there. That is why TV series tend to have more long term impacts than movies do (Beeton, 2005: 12). The influence on tourists numbers is just one aspect of the tourism and film relationship, but there are more influences such as pre visit and on site experiences, film's role in destination promotion and the representation of people, cultures and places as related to tourism (Croy and Heitmann; 2011: 188). Film tourism can motivate people and therefore can continue bringing visitors to destination for several years after the first screening. Another positive impact is that, film tourism reduces the problem of seasonality. Film locations can attract visitors at any time of the year and all seasons (Vagionis and Loumioti, 2011: 356). Apart from increasing in tourists numbers and revenue, other impacts of film tourism are to create employment, development of tourism infrastructure, diversification of tourism product, host community interaction and cultural exchanges (Beeton 2005: 14; Croy and Heitmann, 2011: 196). Representation of the people, culture and places through pictures, narratives, language and other objects is important by means of effecting the viewer's travel decision. It may also lead to a greater level of pride among locals since it creates images of people, place, race, country and culture (Beeton, 2005: 10; Croy and Heitmann; 2011: 193). These images motivate travel and suggest what tourists should see in the location (Iwashita, 2006: 60). In addition to positive impacts, film tourism might cause negative outcomes on a destination in a few different types as well. If a movie location became an important destination after it was showed on the screen, carrying capacity problems and rising prices might occur which would be unwanted issues by the locals. Also, if the location seems to be different than how it was showed in the film, may cause disappointment among visitors (Soliman, 2011: 228).

The role of film in the tourists experience can be divided into two categories. The first is the pre-visit stage. In this stage films have roles in raising awareness, forming images, developing expectations and making decisions. The second is the on-site roles of the film. In this stage, visitors' behavior is motivated by the movie. Visitors travel to

filmed sites and film-associated sites such as studios, theme parks, festivals and homes of celebrities. Taking part in specific tours is another on-site activity that visitors do during their visit. Eventhough not being showed in the movie, other attractions in the location can also get benefits by means of number of visitors and earnings. (Beeton, 2005: 10; Croy and Heitmann; 2011: 193).

Promotion is stated as the most important and influenced role of movies and TV series on tourism. The role of films in destination promotion is raising pre and on-site experiences of tourists, creating awareness, forming the image, providing further information about the location, developing expectation of the location and providing opportunities for the personalization of the film. It was noted that the main target should be a stronger destination image or brand, positive economic impacts and higher tourist visitation. (Hudson and Ritchie, 2006: 258; Croy and Heitmann; 2011: 194). In order to attract film producers and encourage the studios to use the location, governments and destination stakeholders offer a variety of activities such as incentives, scouting services, sponsorships, labor, expertise, grants and tax credits (Hudson and Ritchie, 2006: 390).

According to Hudson and Ritchie's study (2006) on 140 destination marketing organizations worldwide that attracted film tourists in the past, three main benefits were found out as being, stronger destination image and brand, positive economic impact and increases in tourist numbers. Also, the preservation of sites and attractions and improvements to infrastructure were also stated as important outcomes.

For a movie to be a successful driven for tourism, depends on many different factors. This is a multidisciplinary research field that includes subjects such as psychology, marketing, history, sociology and technology. Movies such as Dallas, Crocodile Dundee, Braveheart and The Lord of the Rings extraordinarily effected its audiences to visit the film destinations. A detailed effects of films are shown in table 1.

Table 1. Film Tourism Impact

Film or TV Series	Location	Impact on Visitor Numbers or Tourist Revenue
Braveheart	Wallace Monument, Scotland	300% increase in visitors year after release
Heartbeat	Goathland, NorthYorkshire, England	Three times the number of normal visitors in 1991
Dallas	Southfork Ranch, Dallas	500,000 visitors per year
The Lord of the Rings	New Zealand	10% increase every year 1998 to 2003 from UK
Last of the Mohicans	Chimney Rock Park, North Carolina	25% increase year after release
Little Women	Orchard House, Concord, Massachusetts	65% increase year after release
Harry Potter	Various Locations in UK	All locations saw an increase of 50% or more
Mission: Impossible 2	National Parks in Sydney	200% increase in 2000
Crocodile Dundee	Australia	20.5% increase in US visitors 1981 to 1988
The Beach	Thailand	22% increase in youth market in 2000

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Film or TV Series	Location	Impact on Visitor Numbers or Tourist Revenue
Four Weddings and a Funeral	The Crown Hotel, Amersham, England	Fully booked for at least three years
Saving Private Ryan	Normandy, France	40% increase in American tourists
Pride and Prejudice	Lyme Park in Cheshire, UK	150% increase in visitors
Miami Vice	Miami	150% increase in German visitors 1985 to 1988
Troy	Canakkale, Turkey	73% increase in tourism

Source: Hudson and Rithchie, 2006: 389

3. Turkish TV Series

Despite of the 40 year history, Turkish TV series have become popular just in the last decade. The demand for Turkish TV series was considered to be limited to the domestic and international market for a long time. Turkish TV series improved significantly in terms of production quality and art in the past 15 years. After producers had realized the importance of expanding to international markets, Turkey started to sell soap operas to foreign countries in 2001 (Skylife, 2015). The exports have sharply increased in recent years and in the last decade Turkey has become the second biggest TV series exporter after the USA and it is planning to reach \$2 billion from exporting cultural products by 2023. It is estimated that Turkish TV series reached 400 million viewers in more than 75 different countries. Turkish TV series reach to its audiences in the Balkans, the Middle East, Central Asia, Russia, Africa, Europe and Latin America which is not only limited to a group with the same cultural background. TV series are one of the most significant revenue sources of the TV channels in Turkey and income from series increased 15 times in 5 years and reached 200 million dollars (2012) and prices of exported series reached 200 thousand dollars from 500 dollars. Turkey wants to develop its cultural, natural and historical background and convert to revenue via film productions. In this way Turkey has so many stories that can be themes of TV series. Recently, adaptations of well-known Turkish novels and biographies of historical figures have been a rising trend (Deloitte, 2014: 16). Most popular TV series is the “Magnificent Century”, which focuses on the life of the 16th century Ottoman, Sultan Suleyman the Magnificent. This series has been highly popular both in Turkey and internationally, being broadcast in 43 countries and watched by over 200 million people (Hürriyet Daily News, 2014). Turkish TV series promote Turkey’s popularity all over the world and serve as Turkey’s cultural, touristic and trade representative alongside the export revenues they generate (Deloitte, 2014: 29,35). The main factors that lead to successful TV series are famous cast, a good scenario, broadcaster support and promotion, production company’s reputation and financial power (Deloitte, 2014: 15) In Addition, the reasons for Turkish TV series’ being successful and popular worldwide are quite varied. It is stated that the most important drive is human and family relations based on cultural and historical elements. This can differ in each country or region since economic, social and cultural factors are different than each other (Dipnot, 2015). Sociologists from Balkan countries pointed out that, cultural and linguistic similarity, family traditions, common history and heritage are the main factors behind the Turkish TV series’ being so

popular in the Balkan countries. Despite the success and huge popularity of TV series, there is still not a specific policy or incentive in Turkey that could support the sector's sustainability and competitiveness. Lack of specialist infrastructure of the sector and institutionalization, weaknesses of the companies, intense competition and inconsistent pricing are the most important challenges that threaten the sector.

The TV series sector can also stimulate other industries such as trade and tourism. One of the most important outcomes of exporting Turkish TV series is to promoting country's positive image and increasing in demand to visit Turkey. It is estimated that visitor numbers from the countries that Turkish TV series are exported, increased 15%. One of the main motivators of tourists from the Middle East, the Balkans and North African countries is the Turkish TV series. It is also known that some of these tourists buy second homes in Turkey which means not just tourism but also trade gets benefit from it. Nature, culture, medical and shopping tours are preferred among film induced tourists and they mostly prefer Istanbul, Bursa, Antalya and Konya. Film induced tourists that come from the Middle East spend three times more than an average tourist (Sabah, 2014, Gezikolik, 2015). Besides, products such as clothes, furniture and jewelry easily become popular and this raises claim to Turkish brands. Also, there has been a strong demand towards the agencies to organize tours to locations and special attractions that are shown in the TV series (Dunya, 2014).

4. Methodology and Findings

Saudi Arabia is the first country that we picked for our research. Saudi Arabia is located in the Arabian Peninsula and it is listed in the high income countries with its \$26.340 GNP per capita (The World Bank, 2015). Despite of the member of the same religion and of sharing common history, the diplomatic relations between Turkey and Saudi Arabia has been generally cold and stagnant due to having different political regimes, perspectives and different cultures since 1923. Turkish and Saudi Arabian relations that didn't achieve development due to mutual negative perceptions have started to show improvement after 1980s by means of trade, cooperation and organizations. Especially in the last decade the improvement has showed a sharp progression (Ataman, 2009: 73). Despite having these improvements, tourism and tourist flow between two countries were still limited. The total population of Saudi Arabia is around 31 million, yet only around 1% of the total population visits Turkey (PRB, 2014). The first Turkish TV series in Saudi Arabia was broadcasted in 2007 with the series named "Çemberimde Gül Oya", followed by "Gümüş", which is known as "the Noor" in Arabian world, and became the most popular Turkish TV series in Saudi Arabia. Therefore we try to examine the effect of Turkish TV series on whether the number of Saudi Arabians traveling to Turkey increase or not.

The second country that we chose for our research is Bulgaria. The population of Bulgaria is about 7.1 million and, it has the biggest Turkish minority of the Balkan countries with the population of almost 590.000 that covers 8% of total population of Bulgaria (PRB, 2014; Milliyet, 2011). GNP per capita is \$7.420 in Bulgaria and it is listed in the upper middle income countries (The World Bank, 2015). Ethnic conflicts and Turkish minorities in Bulgaria have been in the center of the relations between Turkey and Bulgaria. It is known that Bulgarians traditionally have negative perspectives over

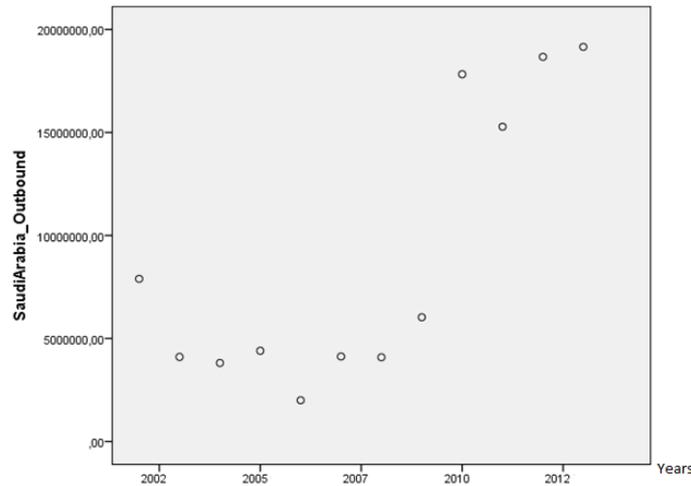
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Turkey due to history. After the cold war, relations between the two countries has started to change in a positive way. These relationships involve not only the Turkish minority but also economic, military, political and cultural cooperation (Kayapınar, 2003: 220,229). These reasons were our main motivators to pick Bulgaria for our research. The first Turkish TV series was broadcast on Bulgarian TV in 2008 with the series named “Binbir Gece” and followed by many others and reached the number of 27 different series over time (Timeturk, 2014). Before the TV series, there had been a significant number of Bulgarians traveling to Turkey. Therefore, we wanted to find out if Turkish TV series have an effect on further increasing the number of travelers.

In order to examine whether Saudi Arabians or Bulgarians are motivated by the TV series to visit Turkey, the number of outbound to all destinations from those countries are graphically displayed so that it is possible to observe the general trends in Figure 1 and Figure 2. The number of outbound to Turkey for both countries is extracted from Ministry of Culture and Tourism (2015). The data related total outbound numbers regarding both countries is obtained from United Nations Data (2015).

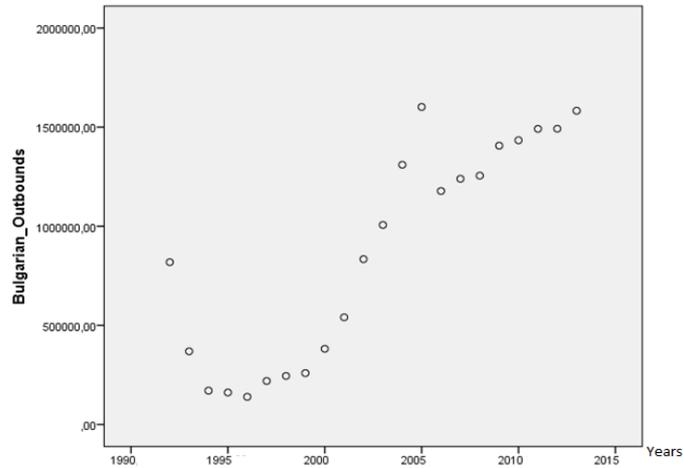
When Saudi Arabia is the case through 2002 and 2009, a steady state with some fluctuations has been witnessed. As of 2010, the number of outbound increased sharply.

Figure 1. The Number of all Outbound Tourists From Saudi Arabia



When Bulgaria is the case through 1992 and 1999, the number of outbound decreased the years. Then a steady increase has been witnessed through 2000 and 2013 with some decrease in 2005.

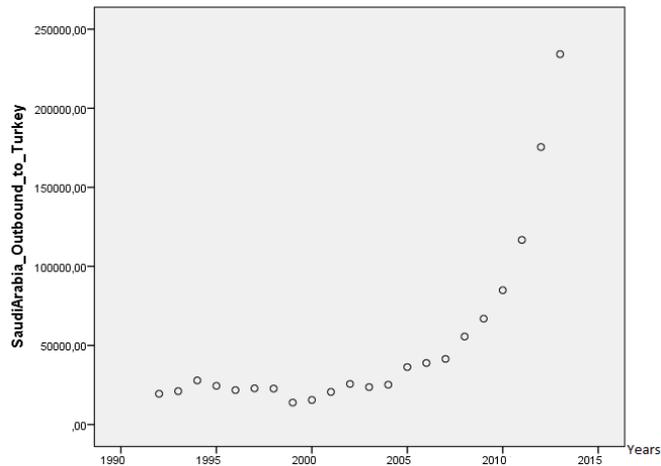
Figure 2. The Number of all Outbound Tourists From Bulgaria



Therefore, it can be said that for both countries, the trend is upward as of 2008.

The number of Saudi Arabians outbound to Turkey is also displayed through the years of 1992 and 2013. Although Saudi Arabians have been showing interest in Turkey as a destination in small numbers having a trend upward with some fluctuations, their percentage in Turkey's portfolio is relatively small in terms of the number of visitations. However, when the Figure 3 is examined, the sharp increase in the number of visitation has been observed starting with 2008. The motivation behind is believed to be the effect of a TV series broadcast in 2007.

Figure 3. The Number of Saudi Arabia Outbound to Turkey

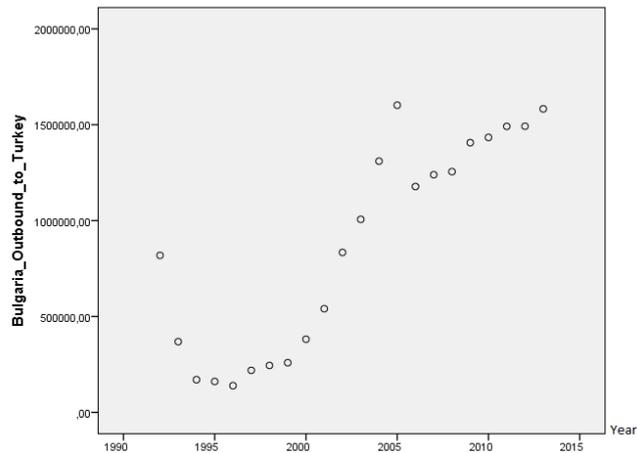


Apart from the trend found in Saudi Arabia, The number of Bulgarians outbound to Turkey is also displayed through the years of 1992 and 2013. Although Bulgarians have been showing interest in Turkey as a destination in large numbers having a trend upward

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with steady increase through the years of 1997 and 2005, the shift in the trend was observed in 2006. When the Figure 4 is examined, increase in the number of visitation has been observed starting with 2009. The motivation behind is believed to be the effect of a TV series broadcast in 2009.

Figure 4. The Number of Bulgarian Outbound to Turkey



In order to measure the effect of TV series on the people of both Saudi Arabia and Bulgaria to visit Turkey as a destination, Chow analysis is conducted to determine whether the trend change occurs or not after one year passed the start of TV series. The results are tabulated in Table 2.

Table 2. Chow Analysis Results

Country	Test Statistics	Table Value	Result
Saudi Arabia	100.84	19.43	Parameters are not equal which means that trend change occurs
Bulgaria	1,09	19.43	Parameters are equal which means that trend change does not occur

5. Conclusion

As a result, Chow analysis shows that while TV series broadcast in Saudi Arabia increase interest in Turkey as a destination, the same is not true for Bulgarians. The trend before 2008 is different than that after 2008 for Saudi Arabians where 2008 is a year that one year passed after first broadcast of Turkish TV series. Hence TV series play a role of attracting viewers to Turkey. However, the trend before 2010 is similar to that after 2010 for Bulgarians where 2009 is a year that one year passed after first broadcast of Turkish TV series. It is difficult to say that TV series do not play a role of attracting viewers to Turkey since the number of outbound steadily increases through the years. However, measuring the effect of TV series on Bulgarians to visit Turkey is difficult to do using Chow analysis.

Tourism industry should establish a strategic cooperation with film industry aiming at marketing destinations embedded in TV series so image development, demand development and image changing activities are implemented in a way of benefiting continuously. Hence, tourism industry has a chance of developing implementations related to pre-visit and on-site visit issues. By doing so, Public contribution to tourism industry can be obtained. The smart way of employing these tools enables not only boost cultural and creative sectors but also help tourism sector reach a point where Turkey has planned to be as top tourism countries in the world. Otherwise, these kinds of successes may diminish without strategic approach.

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