

IMAGINED FUTURES OF POST-COVID-19 TOURISM IN ANTALYA

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ABSTRACT

The Covid-19 pandemic has led to a deep crisis in all tourism destinations in the world, and so did the sun-sea-sand tourism city of Antalya. Will it go 'back to normal' after the crisis or will the crisis trigger a significant change? Will it show an engineering or ecological resilience in the future on the one hand or an adaptive resilience on the other? Because the future is open, actors in the tourism industry face, like all actors, a radical uncertainty about it. Under these conditions, they can only ground their decisions on so-called fictional expectations. In this paper, we connect the 'theory' of resilience with fictional expectations and explore the expectations of tourism entrepreneurs, managers of tourism associations, and government officials in the tourism city of Antalya with a qualitative research approach based on in-depth interviews with leading hoteliers and discourses of tourism leaders in Antalya's tourism. Some expect a return to business as usual, some expect a continuation of changes set in before the crisis as engineering resilience, and others changes triggered by Covid-19 as adaptive resilience. In addition, Covid-19 has intensified collaboration between key actors to strengthen the city's tourism industry in the future.

Keywords

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INTRODUCTION

The Covid-19 pandemic with its travel bans and restrictions, lock-downs, quarantine periods, and infection anxiety has given an enormous blow to the tourism industry in all tourism places in the world. All tourism firms

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(airline carriers and other transportation companies, tour operators, hotels and holiday homes, booking websites, restaurants and cafés, and cruise-ships, tour guides, tourist shops among many others), wherever they are located, have made tremendous losses, and many of them have gone bankrupt, despite state support. The decline of the industry (being very labour intensive) has led to a loss of millions of jobs and deep crises of tourism places.

Over the last decades, the global tourism industry quickly bounced back without any significant structural change after shocks such as the 9/11 terrorist attack, the outbreak of SARS (2002), the global economic crisis (2008), the bird flu (2009), and MERS (2012) (see World Tourism Organization and International Labour Organization, 2013; Gössling et al., 2021). The same applies to the tourism industry in many tourism places such as, for instance, Sri Lanka after the Tsunami in 2004 (Buultjens et al., 2015), Antalya after the Turkish geopolitical crisis in 2015 (Terhorst & Erkuş-Öztürk, 2019), and Bali after the terrorist bomb attack in 2002 (Gurtner, 2007). Thus, in the past, the industry has shown strong resilience to shocks that do not seem to have triggered any significant structural change. The resilience of tourism places in the past seems to conform to so-called ‘engineering’ resilience (self-restorative bounce-back from shocks) or ‘ecological’ resilience (ability to absorb shocks without structural change).

The Covid-19 pandemic, by contrast, has caused such a deep, unprecedented global crisis in the tourism industry that, according to many critical tourism researchers, it offers opportunities for structural change. They advocate and expect more ‘global consciousness to address global problems’, more sustainable tourism, de-globalization, more domestic tourism, de-growth, less over-tourism, less exploitation of tourism workers, and the end of neoliberal globalization (see Lew et al., 2020 and Deep Sharma et al., 2021).

Although major crises and shocks often triggered structural change in the past (think of Schumpeter’s (1939) theory of long-term busts and booms, World War II, and the crisis of Fordism and the Keynesian welfare state), it remains to be seen whether or not the Covid-19 pandemic will be a potential catalyst to ‘adaptive’ resilience of tourism places (adaptive development in response to or anticipation of shocks). We have to “be careful what you wish for” (Hall et al., 2020) and the ‘forgetfulness’ of tourists and tourism entrepreneurs is high (Formaki, 2021). More importantly, the tourism industry has a strong interest in boosting up its pro-growth strategy of the pre-Covid-19 era if only because tourism firms

that did not go bankrupt suffer from large debts with banks and tax authorities; and so have local and national states that are structurally dependent on the unlimited growth of the tourism industry. Thus, structural change in tourism will be strongly opposed by the vested interests of pro-tourism industry boosters. This potential conflict is already visible in academia where recently a truly ideological struggle has started between pro-industry boosters and pro-limits critics who advocate environmental limits, ecological concerns, human rights and more equality, and worker rights among others (Higgins-Desbiolles, 2021).

This paper is about the expected recovery from the Covid-19 crisis of the tourism industry in Antalya, a sea-sand-sun tourism city that welcomed around 10 million foreign visitors just before the Corona outbreak. Because the Covid-19 pandemic is not over yet, we obviously cannot analyse Antalya's resilience in retrospect. But what we can do is to explore the fictional expectations (a concept coined by Beckert, 2016) and anticipations of tourism firms and policy makers to the city's post-Covid-19 (if it will ever be) tourism development. Tourism entrepreneurs and policy makers have to look ahead to anticipate to the future and to ground their decisions on future expectations. Because the future is open, they cannot form rational expectations based on a probability calculus but can only rely on so-called fictional expectations and narratives of the future. In this paper, we aim to answer the following research question.

Do tourism entrepreneurs and policy makers in Antalya expect that the city's tourism industry will go 'back to normal' or show significant changes in the post-Covid-19 era, and, if so, what are those changes? And do they already act accordingly? In other words, do they expect Antalya's tourism industry will bounce back to the same development path as before or bounce forward to a new development path that significantly differs from the pre-Covid-19? In case of bouncing back they implicitly expect an 'engineering' or 'ecological' resilience of the city's tourism industry and in case of bouncing forward an 'adaptive' resilience.

This paper is organized as follows. In the first section, we shortly discuss some main points in the debate on regional economic resilience (but do not intend to review the voluminous literature) and argue, following Pike et al. (2010, p. 66-67) and Bristow and Healy (2014a, 2014b, 2015) for an agency perspective on it. From that perspective, we can connect the 'theory' of regional economic resilience with that of fictional expectations discussed in the following section. Although we rely on the Beckert's work on fictional expectations (Beckert, 2013, 2016; Beckert & Bronk, 2018), he is certainly not

alone in pointing out the role fictional expectations, imaginaries, and narratives play in economic life. A long time ago, the economist Shackle (1979) did, and Nobel Prize winners Akerlof and Shiller have recently analysed how animal spirits and narratives drive major economic events (Akerlof & Shiller, 2009; Shiller, 2019). In the subsequent sections, we present our research methodology and empirical results.

LITERATURE REVIEW: MAIN POINTS IN THE DEBATE ON REGIONAL ECONOMIC RESILIENCE

Regional economic resilience literature focuses on how countries and regions are resistant to economic shocks and how they recover after such a shock. Resilience is often interpreted in terms of economic growth rate but it can, in principle, be broader interpreted, such as, for instance, in terms of environmentally sustainable development or level of living. Martin (2012) discussed the concept of resilience under three different meanings of it. Firstly, '*Engineering*' resilience refers to the economy returns to its pre-shock equilibrium growth path without any change of its structure. Secondly, '*Ecological*' resilience is defined as "the magnitude of a shock that can be absorbed before the system changes its form, function or position". Thirdly, '*Adaptive*' resilience, reflecting more an evolutionary view, refers to the capacity of an economy to adapt and to renew its economic structure. Evolutionary economic geographers tend to distinguish between adaptation and adaptability but interpret them differently. According to Pike et al. (2010), adaptation concerns changes with preconceived paths in the short run, whereas adaptability is about developing new pathways. Evenhuis (2017, p. 3), on the other hand, argues for another view. According to him, adaptation refers to the actual process occurring in a regional economy to deal with unforeseen changes whereas resilience refers to the underlying capacity: the unobservable, hypothesized potential of a regional economy to cope with disturbances more generally. Adaptability depends on the diversity of the region's economic structure, and it depends on the capacity of a region to reorient its extra-regional connections (Evenhuis, 2017, p.3). Thus, regional economic resilience is not a static property of a regional economy that is only present when a shock occurs. It is a feature that is continuously, i.e. in both shock- and non-shock periods, produced and reproduced, be it more intense in shock periods (Martin, 2018). The latter are periods of stronger 'creative destruction' than non-shock periods, that is more old economic activities die off and more 'new combinations' are created. Nevertheless, also in 'normal' (non-shock) periods regional economies adapt themselves to changing circumstances and innovate. The

higher the adaptability and innovativeness of a regional economy in 'normal' times is, the less vulnerable it is to shocks and the more successfully it recovers from shocks.

The evolutionary approach to regional economic resilience has been criticized for ignoring politics. Regional economic restructuring (in a broad sense) is hardly possible without state intervention. This criticism is only partly right, however, because it is aimed at one version of evolutionary economic geography. In more recent discussions among evolutionary economists and evolutionary economic geographers (Martin & Sunley, 2015), as well as in empirical research on regional economic resilience, much attention has been paid to the role of institutional arrangements and policy making in regional economic resilience (see, for instance, Bristow & Healy, 2014a, 2014b, 2015; Eraydin, 2016; Evans & Karecha, 2014; Kakderi & Tasopoulou, 2017).

Fictional Expectations

Expectations of the future have almost completely ignored in discussions on regional economic resilience, and researchers on regional economic resilience will, at first look, be inclined to believe that they have nothing to do with each other. This is not surprising because, first, the different conceptualizations of resilience share a common emphasis on defining resilience in terms of the functioning of the regional economy as a system or complex adaptive system in which the role of agency is largely ignored (Pike et al., 2010, p. 66-67; Bristow & Healy, 2014a, 2014b, 2015). Second, and related to it, almost all empirical research is oriented to the past, not to the future. Most resilience literature is about comparative research on how countries and regions are resistant to and recover from shocks on the basis of their previous spatial characteristics and production structures (Brakman et al., 2015; Capello et al., 2015; Eraydin, 2016; Giannakis & Bruggeman, 2017). But regions are not actors, entrepreneurs and policy makers among others are. They interpret shocks, analyse whether or not and, to what extent, they are part of a long-run tendency, and form expectations of the future according to which they may or may not proactively change their strategic behaviour. People are active agents in resilience, and resilience is a set of capacities that can be intentionally developed and acquired. When economic and political actors take a decision, they have to form expectations of the effects and consequences of their decisions in the future.

Lucas' (1972) theory of rational expectations is the most sophisticated formulation of the idea of rationality of expectations. To neoclassical

economists, expectations of the future are about a future that is, in principle, knowable, although its knowability may be limited by the learning capacity of actors. Thus, they believe that, in principle, the future can be predicted on the basis of sufficient knowledge of the past and the present. It is a deterministic view on the future in which there is no place for uncertainty in the sense of Frank Knight (1921) who defined uncertainty as situations in which actors cannot form rational expectations of the future on the basis of a probability calculus. If one rejects a deterministic view on the future and accepts that the future is open, then all actors face radical uncertainty about the future. But how then do economic and political actors anticipate the future and take their decisions under conditions of radical uncertainty? According to Keynes, decisions under conditions of uncertainty can only be taken as a result of 'animal spirits' that refer to the emotions and instincts that guide the behaviour of investors and consumers in a market economy. For instance, a self-fulfilling prophesy (an expectation or prediction comes true simply because individual or collective actors behave accordingly) is an important mechanism in getting out a crisis or shock. This idea has been further elaborated by economists like Nobel Prize winners Akerlof and Shiller (2009). They distinguish, in addition to the well-known consumption-, investment-, and government expenditure multiplier, a confidence multiplier that represents the change in income that results from a one-unit change in confidence, however, it might be conceived or measured. Changes in confidence will result in changes in income and confidence in the next round, and each of these changes will in turn affect income and confidence in yet further rounds. Thus, positive expectations of the future may have a positive effect on bouncing back or bouncing forward (in case of adaptive resilience) from a shock. In the same vein, Shackle (1979) and Köhn (2017, p. 177-192) claim that economic actors base their actions on imaginations, fictions, and narratives under conditions of uncertainty. Likewise, the leading economic sociologist Beckert (2016) argues that "they imagine how the future will look like and base their decisions on what he calls 'imaginaries' or 'fictional expectations'". They refer to "*images actors form as they consider future states of the world, the way they visualize causal relations, and the ways they perceive their actions in influencing outcomes*" (Beckert, 2016, p. 9).

Fictional expectations are the opposite of the neoclassical concept of rational expectations, and are not only individually but also socially constructed by a variety of social factors, and take the form of narratives, discourses, and theories that are historically and geographically specific. The social construction of fictional expectations is part of a power struggle

among interest groups. Dominating fictional expectations of the future gives power to interest groups because they steer individual and collective decisions.

Some of these ideas, be it in different form and without referring to above-mentioned literature, have recently been penetrated a little bit in resilience literature. Evenhuis (2017, p. 8) hints, very shortly, at the role of narratives and anticipation of changes in the future, and Martin (2018, p. 860), who has been leading discussions on regional economic resilience, points out the importance of business confidence in resilience. Business confidence is one form of fictional expectations of businesses. A confidence in the underlying strength of a region's economy encourages investment and innovation, which reinforces that strength and further boosts confidence. In case of a lack of confidence, a converse circular process will operate. Although fictional expectations of the future are, to a large extent, collective, not all entrepreneurs behave accordingly. Real entrepreneurs in the Schumpeterian sense sail against the wind and innovate, irrespectively what others expect of the future, and other business leaders don't have the resources to behave according to dominant fictional expectations and don't survive or have to accept lower profit rates. In the past, for instance, many tourism entrepreneurs, tourism researchers, and policy makers believed that the future of successful post-mass tourism is in upgrading tourism services to middle- and higher classes. Nevertheless, a lot of tourism entrepreneurs did not share that belief and did not enter those sub-markets.

METHODOLOGICAL REMARKS

Our research strategy raises a few questions that have to be clarified. First, it is ambiguous what post-Covid-19 tourism means. Almost all epidemiologists and virologists argue (it is their collective fictional expectation!) that Covid-19 will never completely disappear but could pose less danger over time (Telenti et al., 2021). Thus, strictly spoken there is no post-Covid-19 era. However, we could speak of a post-Covid-19 era when all or the majority of Turkish citizens and all foreign tourists visiting Turkey are vaccinated and able to proof it. However, this demanding definition is somewhat problematical because the vaccination coverage varies among inhabitants of outbound countries that would like to visit Turkey. It would imply that Antalya would miss out a significant number of potential foreign tourists and would slow down the city's economic resilience. A lighter criterion of the end of the post-Covid-19 period is that Turkey allows all foreign tourists to visit the country that are either vaccinated or tested in 48

hours before entering the country. Turkey has chosen this lighter criterion for visiting the country in 2021.

Secondly, it is important to stress that our research is limited to the supply side of Antalya's tourism economy. If both tourism firms and policy makers in Antalya and foreign tourists would believe that tourism has to take a new development path, then structural change is most likely. If, by contrast, it is believed both on the supply side and demand side that business as usual is the best of all worlds, then Antalya's tourism economy would bounce back to normal. But other combinations are also possible in which Antalya's tourism firms and policymakers believe a new development path is necessary whereas foreign tourists don't believe, as well as the other way around (Brouder, 2020). In this paper, we explore the fictional expectations of tourism entrepreneurs (who played a leading role as opinion leaders in Antalya's mass tourism growth) and leading policy makers in Antalya's tourism. Antalya is a mass tourism city of Turkey and has attracted yearly more than 10 million visitors till the recent years both (geo)political and Covid-19 crisis. Given its mass tourism character (consisting of mostly foreign tourists), it also attracts tourists for golf-, eco-, and heritage tourism. The growth of Antalya's tourism has led the growth of related and unrelated sectors (Erkuş-Öztürk & Terhost, 2018). Given its foreign tourism-oriented structure, it is not surprising that the Covid-19 crisis affected the development of Antalya's tourism. Tourism entrepreneurs like all entrepreneurs have, under conditions of uncertainty, to form fictional expectations of future demand and act accordingly.

To analyse the fictional expectations of Antalya's future, we applied a qualitative research method to answer the following open ended questions. Do tourism entrepreneurs and policy makers in Antalya expect that the city's tourism industry will go 'back to normal' or show significant changes in the post-Covid-19 era, and, if so, what are those changes? And do they already act accordingly? Are there future expectations collectively shared or not, and if so to what extent? Do they expect less foreign tourism arrivals in the future by plane? Do they expect environmental awareness of tourists that reduces air traffic? Do they expect a growth of domestic tourism after the Covid-19 crisis? Do they expect more environmentally friendly tourism measures from the national government? Do they expect overtourism in the future? Do they expect cheaper tourism alternatives for domestic tourism? Do they expect a shortage of labour due to the Covid-19 crisis?

To answer the questions above, we used both primary and secondary data. We got primary data from in -depth interviews which started in

September 2020 with managers of leading hotels that played a key role in the development of Antalya's tourism (such as Champion hotels (the first mass-tourism hotel in Antalya), Crystal hotels (one of the biggest chain hotel in Antalya centre), Nirvana Cosmopolitan hotels (first luxury 7- star luxury city vegan hotel), Nirvana Chains Kilit Global Group leader (one of the biggest investor in the diversification of Antalya's tourism), Nashira Resorts, Olympos Lodge boutique hotel (one of the best and old boutique hotel investor), and other key actors such as the manager of Anex Tour and Coral Travel (one of the best tour operators in Antalya), BETUYAB (Belek Tourism Investors Union, First private tourism investors association), and the Free Zone Manager in Antalya.

Table 1. *Source of data and in-depth interviews*

Data Type	Stakeholders	Type of Stakeholder
<i>Primary Data</i> In-depth interviews	Champion Hotels Manager	Visionary, 1st mass tourism hotel investor in Antalya
	Crystal Hotels Manager	Important Hotel chain leader in Antalya
	Nirvana Hotels Manager	Big Hotel Chains in Antalya
	Nirvana Cosmopolitan Manager	Leading investor of the biggest City Vegan Sport Hotel in Covid-19 Crisis time
	Nashira Resorts	Leading hotel chain in Antalya
	Olympos Lodge Manager	Oldest leading boutique hotel in Antalya, Kemer
	Kilit Global	Investor, Diversified tourism companies
	Anex Tour Manager	Important tour operator in Antalya's tourism
	Coral Travel Manager	Important tour operator in Antalya's tourism
	Betuyab Manager	Belek Tourism Investors Union, First private tourism investors association)
<i>Secondary Data</i> Discourses of 12 speeches from Resort 2020 Congress speakers	Antalya Free Zone Manager	Yacht construction companies information
	Cem Kinay's Talk	Starter of All-inclusive system in Turkey
	Club Marvy's Talk	Manager of Club Mary, differentiated concept hotel
	Turofed Leaders Talk	Turkey's Hoteliers Federation
	Mehmet Ersoy, Responsible of the Ministry	Ministry of Culture and Tourism
	Denizbank Financial Services Manager	
	5 Tour leaders	
	2 Tourism bloggers	

We completed 10 in-depth interviews with opinion leaders in Antalya's tourism and when we got repetitive replies we stopped at May 2021. In the second stage, we used secondary data from the keynote speeches of the Resort Congress 2020's video records of future tourism strategies of the national government and private sector leaders. There were 12 speeches ranging from Cem Kinay (starter of All-inclusive system in Turkey), Club Mary hotel manager, Turofed (Turkish Hoteliers Federation) leader, 5 tour leaders, Manager of Ministry of Culture and Tourism, DenizBank Financial Services Manager, 2 Tourism bloggers. Research

questions are analysed by using narratives of interviewees. We used codes for every interviewee, gave quotations of discourses and analysed them.

FICTIONAL EXPECTATIONS OF FUTURE TOURISM IN ANTALYA

Two preliminary remarks should be made before presenting our empirical research. First, in most resilience literature, including evolutionary economic-geographical one, the region as a whole but not the individual firm is the research object. However, one of the key concepts of evolutionary economic geography is variety, which implies that the adaptability and innovativeness of firms between and within industries vary in pre-shock and shock periods. The same can be said of the future expectations of tourism entrepreneurs in Antalya. As shown below, they vary in many respects.

Second, the concepts of engineering and ecological resilience presuppose that regional economies are in a static equilibrium before a shock after which they return to a new static equilibrium. Evolutionary economic geographers, by contrast, who embrace the concept of adaptive resilience, stress that regional economies follow a dynamic development path, and the higher the adaptability and innovativeness of regions are in pre-shock periods, the less vulnerable to shocks they are and the more quickly recover from them. Thus we should not conceive of regional economic development in terms of a static period without change which is disturbed by a shock and followed by a new static period.

There are various indications that over the last twenty years the development path of Antalya's tourism economy has been very dynamic with a lot of adaptability and innovativeness. Antalya's tourism economy has been fairly resilient to crises like the bird flu in 2003, the global financial crisis of 2008, and the Turkish (geo)political crisis in the period 2014-2018 (Terhorst & Erkuş-Öztürk, 2019). This is in line with the region's adaptability and innovativeness. Its tourism economy has been strongly diversified over the last twenty years (Erkuş-Öztürk & Terhorst, 2018, and many hotels and restaurants have been fairly innovative (Erkuş-Öztürk & Terhorst, 2016, 2017). As shown below, the future expectations of some interviewees reflect a static view of both the pre- and post-Covid-19 period because they do not refer to the dynamics of Antalya's tourism economy at all. Their future expectations are labelled as 'business as usual'. Other interviewees, by contrast, expect that Antalya's tourism economy will be as adaptive and innovative in the post-Covid-19 era as before. Thus they implicitly refer to adaptive resilience. However, the expectations of some of

them are explicitly related to the Covid-19 pandemic whereas those of others reflect tendencies that were set in earlier and have hardly or not been triggered by the Covid-19 crisis. The former expectations are labelled 'expectations triggered by Covid-19' and the latter 'expectations based on pre-Covid-19 tendencies'. Figure 1 presents the organization of the empirical analysis.

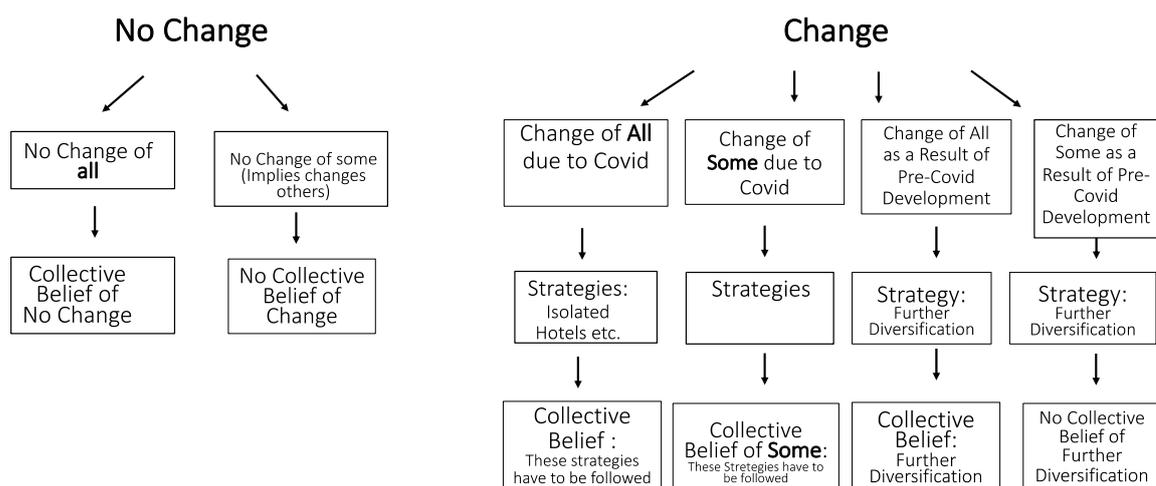


Figure 1. Organization of the empirical analysis

Post-Covid-19 expectations: business as usual

Some interviewees of the tourism industry in Antalya expect that, even in the long term, they do not need to change their business strategy because tourists will come anyway. They expect to return to normal times because the Covid-19 crisis is temporary. They argue that holiday culture is so firmly settled in the world that people will go again on holiday after Covid-19 and tourism demand will grow again in the future. Particularly Antalya's tourism economy will be successful because they expect that foreign tourists cannot find elsewhere along the Mediterranean coast such a high-quality place at low prices as Antalya.

All interviewees (including the ones who ground their expectations on more dynamic views) expect Antalya's competitive position will be strong again in the future on the basis of high value for money. In the words of a financial manager of a 5 star-hotel in Manavgat:

"our five-star mass-tourism all-inclusive concept is our asset and not comparable to other countries; we offer high-quality services for lower prices. So we will always be selected by foreign tourists. Many hotel investors will continue to ground their business model on the all-inclusive concept".

The interviewees who expect business as usual do not believe that Antalya's tourism market will change after Covid-19. The European and Russian markets will remain the most important ones for Antalya (and Turkey) due to their proximity and high quality for low prices. Thus Covid-19 will not lead to a greater share of domestic tourists.

Notwithstanding EU-plans to levy a tax on kerosine and to oblige airline carriers to buy CO₂-emission rights, and a growing environmental consciousness among European tourists as is reflected in the term 'flight shame', all interviewees do not expect that all these things will affect Antalya's tourism. According to the manager of a luxury boutique hotel:

"I don't expect big changes in the future of airline traffic. Maybe long-distance flights will decline somewhat. But it won't affect Turkey, because Europe is nearby and Turkey is accessible by other modes of transportation such as by car and cruise".

Thus the environmental impact of airline tourism is downplayed by our interviewees. More generally, many interviewees do not expect that climate change nor Turkish climate policy will have any impact on Antalya's tourism. The manager of Coral Travel, for instance, says:

"Climate change won't have much impact on Antalya because it will not have much effect on Mediterranean countries. Of course, if summers will become hotter here, just as hot as in Thailand, tourists will visit us anyway, just as they will continue to visit Thailand".

And no interviewee believes that the Turkish government can and will apply strict measures to stimulate more environmentally friendly tourism. It is too dependent on the existing tourism system.

In short, the interviewees who expect business as usual in the future have implicitly a static view of the tourism economy of Antalya. Covid-19 has disturbed the equilibrium of the city's tourism economy to which, they expect, it will return in the future. Their expectations of the future reflect an engineering or ecological view of regional economic resilience.

Expectations based on pre-Covid-19 tendencies

Some interviewees conceive Antalya's tourism economy in more dynamic terms and expect that Antalya will follow the same development path in the post-Covid-19 era as before. Tourism entrepreneurs, representatives of tourism business associations and public institutions, all say that Antalya's tourism has shown strong resilience to former crises. Although a lot of firms

will go bankrupt during the current crisis, many will survive and will do their business in the same way as prior to the pandemic. In the words of one interviewee, who is the first hotel investor in Antalya:

“The current tourism system will remain the same in the post-Covid-19 era because Turkey and Antalya have adapted successfully to various crises during recent decades”.

Because of the high adaptability and innovativeness in the past, Antalya’s post-Covid-19 development path will continue after the crisis. According to the manager of Champion hotels:

“We are Turkish tourism specialists who created Antalya’s tourism industry from scratch. In the distant past, when there was no tourism here, we imagined a bright future for Antalya’s tourism. Ever since then, we have been innovative and creative in shaping the future of the region’s tourism. We were, for instance, forerunners in creating retirement hotels, forest hotels, and hot water hotels. We imagined what Antalya should look like in the future and created Antalya’s Tourism Development Plan which has been applied. So we will again create a successful future for Antalya”.

And the manager of a big hotel chain believes in the continuity of the current system by creating more diversification:

“Besides focusing on luxury tourism in Antalya, fantastic theme parks, free-trade and shopping zones should be developed to balance seasonal differences. If we create shopping centres for big brands (like Prada and Versace), tourists will come here in winter and combine holidays with shopping. Such kinds of attractions should be developed to support winter tourism. I believe that the domestic market is also always a solution in Turkey’s future tourism”.

There is a broadly shared belief among the interviewees that Antalya should focus on high-quality tourism in the future. This view is certainly not new because it has been advocated by many entrepreneurs and representatives of tourism business associations over the last two decades. To overcome the problem of overtourism other Mediterranean countries struggle with, they argue that high-quality tourism can prevent overtourism. But focussing on high-quality tourism implies less room for domestic tourism. The prices of most hotels are in Euros, and due to the gap between the Euro and the Lira (which has widened over the last years), domestic tourists, except for higher classes, cannot afford holidays in Antalya.

Cem Kınay, establisher of the all-inclusive system in Turkey, also stresses the need for more diversification:

“Innovative services must be developed, especially for people below 40 years old. New generation, Y and Z generation already know many things and criticize everything, so you need to develop the quality for not be criticized by the new generation who are critical about holidays. Influencers such as on Instagram and their followers are very important in defining new trends. I expect that Mardin, Hatay, Göbeklitepe, Egean and Mediterranean inner localities will become favourable destinations in Turkey”.

The manager of the Champion hotels point to another form of diversification, the rise of ‘hybrid hotels’:

“Staycations, hotel apartments with a lot of services where people can combine work (online) and holidays”.

But, if the current crisis would last long and these staycations would become more popular, Coral Travel manager says, then

“It would imply large-scale renovation of hotel buildings. Their costs would be so high that it can only be realized with help of the state”.

In short, these interviewees expect that Antalya’s tourism economy will be as adaptive and innovative after the crisis as before. Thus they implicitly interpret resilience in terms of adaptive resilience. However, the changes they expect in the future are not triggered by the Covid-19 crisis but are a continuation of tendencies that started long before the current crisis, namely a focus on high-quality tourism and more diversification.

Expectations triggered by Covid-19

The current crisis has given an opportunity to big firms to take over other firms that have come into problems due to the pandemic (*“big firms invest themselves out of the crisis”*). For instance, some interviewees in Antalya said that when one hotel goes bankrupt, bigger hotels buy it at a low price. In other words, big hotels use the crisis as an opportunity to buy other hotels. As a result, hotel industry concentration will, *ceteris paribus*, increase. A good example is a big hotel chain in Antalya having their own vineyards, meat production farms, and cleaning firms among others. This group has bought other hotels that went bankrupt during the Corona crisis and has renewed them into environmentally friendly hotels with a lot of social distance possibilities and environmentally friendly products and services. They started to serve more ecological and vegan food and invited Michelin-starred chefs. In addition, they have their own large parks and sports complexes.

According to many interviewees who expect Covid-19 will trigger a change in the future, the pandemic has changed the demand and this will continue to be in the future. Although the European and Russian markets will remain the most important ones, the domestic market of higher-class Turks has grown during the crisis and is expected to grow further after Covid-19. In the words of a manager of a 5-star hotel:

“The pandemic has one advantage, namely that higher-class Turks started to visit good Turkish hotels”.

During and after the pandemic, tourists have become very conscious of the danger of Corona and other viruses and about the environmental degradation and climate change due to tourism. Consumers are still afraid of viruses in general and new varieties of Corona in particular. They don't shake hands and embrace friends anymore and feel uncomfortable in dense concentrations of the population. Consequently, they visit big cities less than before, and prefer to make their holidays under extremely hygienic conditions, not in hotels but in private (luxurious) villas with private pools in isolated places or, less luxuriously, in caravans in isolated places. Thus most of the big hotel owners and tourism summit actors believe that the growth of Antalya's tourism in the future is found in less crowded places, and isolated holiday areas in nature, i.e. retirement and hot-water hotels, B-leisure, wo-cations, request based experiences, quality experiences, staycations, glamping (luxurious tents on spacious grounds with private pools), hybrid hotels, more new boutique hotels, luxurious caravans in isolated nature, more villa tourism, and more yacht tourism. All these have increased tremendously in 2021 summer according to tourism specialists. In the words of a free zone manager,

“Yacht companies made profit and order of Yacht construction has increased tremendously this summer which shows us a clue to future tourism”.

Particularly new tourism firms will exploit the changed demand of those tourism services. They offer private villas, caravans and specialized luxury resorts with private pools in isolated places that offer more diversified services than before. According to some private investors:

“Due to Covid, small hotels in the luxurious niche market will show a high growth rate in the future (private room pools and services like in Kaş villas and Kemer boutique hotels such as Olympos Lounge)”.

Many interviewees expect that Corona will lead to new, flexible reservation systems and, therefore, changing relations between local tourism firms and tour operators. In tourism production networks there is

always the struggle of who pays and receives when. The risk of cancelled trips is lowest for tour operators when consumers have to pay in advance whereas hotels are paid afterward (and vice versa). After Corona tourists still remember their bad experience with tour operators and airline carriers that refused to return their advanced money although they were obliged by law in many countries and no longer want to pay in advance. Likewise, hotels in destinations want to be paid in advance to avoid the burden of risk being shifted on their shoulders. All this will lead to new systems of insurance backed by the state. Tourists will become not only more hesitant to book a long time in advance but will also prefer to compose and arrange their own package tours and make their reservations by themselves instead by tour operators and travel agencies. As one interviewee declares:

“In ten years, self-reservations systems will be of great importance. Booking via tour operators and travel agencies will decline. So the tourism value chain will change, because self-reservation systems, online bookings, and last-minute options will become more popular. Tour operators will lose market power unless they change their systems and provide new cancellation policies.”

Collaboration triggered by Covid-19

From the foregoing, it is clear that, during the Covid-19 crisis, all actors in Antalya’s tourism industry have a very optimistic view of the future (and downplay the environmental impact of flight tourism). This confidence in the future business, being important in regional economic resilience, has provoked collaboration between local tourism entrepreneurs, tourism business associations, the national Ministry of Culture and Tourism, and banks; and, equally important, this collaboration is expected to be continued after the crisis. All those actors already closely worked together before the crisis (Erkuş-Öztürk, 2011; Erkuş-Öztürk & Terhorst, 2012), but have since then intensified their collaboration to mitigate the effects of the crisis and strengthen the region’s tourism industry in the future.

The central state has, in collaboration with the Deniz Bank, supported hotels with credit guarantees for hygiene measures among others, and the payment of salaries so that workers could stay employed; and it gave a tax reduction to tourism firms. To mitigate the effects of the crisis, the national Ministry of Culture and Tourism created, in collaboration with TUROFED (Turkish Tourism Hoteliers Federation), AKTOB (Union of Mediterranean Touristic Hoteliers and Operators), TUROB (Turkish Hotel Association), and TUREB (Turkish Tourist Guide Organization) the so-called Tourism Safety Certificate that is intended to

protect tourists against Covid-19. According to a manager of TUROFED (Turkish Tourism Hoteliers Federation):

“In the short term we successfully applied the health certificate successfully to protect our visitors. We created test centres by ourselves, and if one tourist is infected by Covid, we host him or her free of charge in hospitals and hotels. In addition, travel agencies arranged the flights of these covid tourists free of charge. This certificate will continue to be operative in the future.”

The national Ministry of Culture and Tourism and the above-mentioned tourism associations set up the Turkish Development Agency, an organization that has to promote the digitalization of tourism in the future and it created a new website (GoTurkey.com). The aim of this organization is to support flexible booking systems (it is opposed to early booking practiced by tour operators), customer relation management (CRM), digital and TV advertising, and to develop a digital experience platform. In addition, it collaborates with regional development agencies and with Cem Kinay, a big name in Turkish tourism, to support local tourism. In sum, the collaboration between government officials, managers of tourism associations, and tourism firms, intensified by Covid-19, has helped shape the future expectations of Antalya’s tourism.

CONCLUSION

The kernel of our theoretical argument in this paper is that actors who face radical uncertainty about the future have no choice but to base their decisions on fictional expectations. These expectations play an important role in the economic resilience of regions. A sunny view of the future has a positive effect on regional economic resilience. All our interviewees believe that Antalya’s tourism economy will prosper again in the post-Covid-19 era, particularly on the basis of high quality for low prices. This does not mean that all their other expectations of the future are the same. Some interviewees have a static view of Antalya’s tourism economy and their expectations are implicitly based on an engineering conception of regional economic resilience. They expect business as usual in the future, i.e. the European and Russian markets will remain as dominant as before, and they are blind to the environmental impact of flight tourism and do not expect that environmental consciousness of foreign tourists will have any effect on the development of tourist arrivals. Most other interviewees, by contrast, have a dynamic view of Antalya’s tourism economy. They have implicitly an adaptive conception of resilience in their minds but their expectations differ regarding the role the Covid-19 crisis plays. Some interviewees point

to the adaptability of Antalya's tourism economy: it quickly bounced back from earlier crises and flexibly responded to new developments in the past. They expect and advocate more diversification of the city's tourism economy and believe that it can easily respond to environmental policy changes in the future (although they do not expect strict environmental policy measures). But their expectations of the future are not triggered by the Covid-19 crisis: they expect tendencies that have been started (long) before the crisis. Other interviewees expect a lot of changes that are triggered by the Covid-19 crisis and have made already decisions on the basis of their expectations. They expect (and some have already acted accordingly) a strong growth of Turkish higher-class tourists, more environmentally friendly hotels with a lot of social distance possibilities in isolated places, more luxurious villa and caravan tourism with private pools, more B-leisure, staycations, clamping, and hybrid hotels. In addition, they expect a growing importance of self-reservation systems that will undermine the market dominance of tour operators. Finally, Covid-19 has intensified collaboration between key actors regarding credit guarantees, payment of salaries, tax reductions, the health certificate, and the foundation of the Turkish Development Agency.

In the foregoing we have seen that some fictional expectations are collectively shared among our interviewees whereas others are not. It would be very interesting to explore whether or not the variety of their fictional expectations of tourism firms is related to the characteristics of firms.

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