

**REPUBLIC OF TURKEY**

**MINISTRY OF CULTURE AND TOURISM**

**DIRECTORATE GENERAL FOR PROMOTION**

**CAMPAIGN BRIEFING**

# CAMPAIGN NOTIFICATION

## CONTENTS

- ✓ Current Situation of Turkish Tourism
- ✓ Tourism Trends and Perspectives
- ✓ Tourism Products of Turkey
- ✓ Target Groups
- ✓ Marketing Objectives
- ✓ Communication Objectives
- ✓ Communication Strategy
- ✓ Consumer Outcome

# **CURRENT SITUATION OF TURKISH TOURISM**

# TURKEY

## GENERAL INFORMATION



**Country Name :** Republic of Turkey

**Language :** Turkish

**Alphabet:** Latin

**Population:** 74.7 million

**Average Age:** 28.5

**GDP:** 772.2 \$ billion (2011)

**16th. largest economy amongst 30 OECD countries**

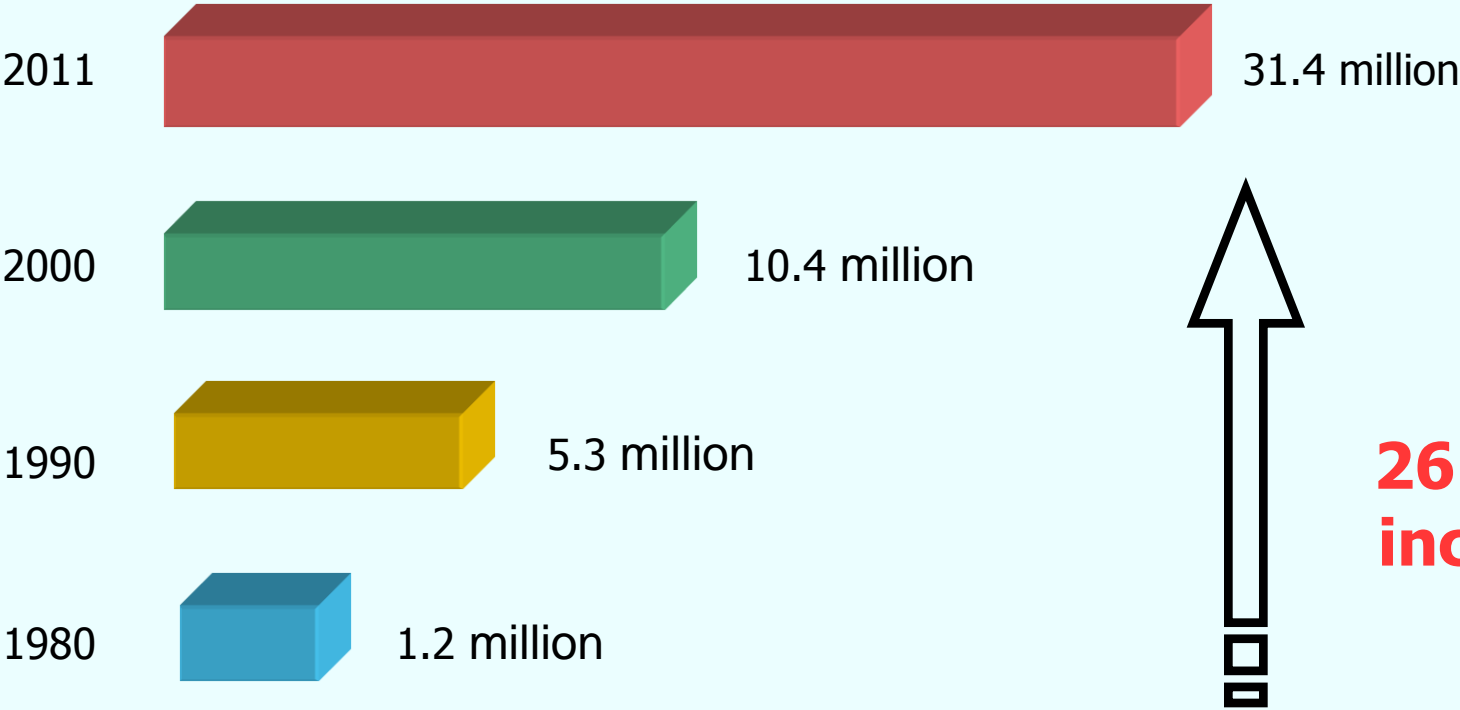
**GDP per Capita:** 10,444 \$

**Growth Rate:** % 8.5 (2011)

# CURRENT SITUATION OF TURKISH TOURISM

## PROGRESS OF TURKISH TOURISM

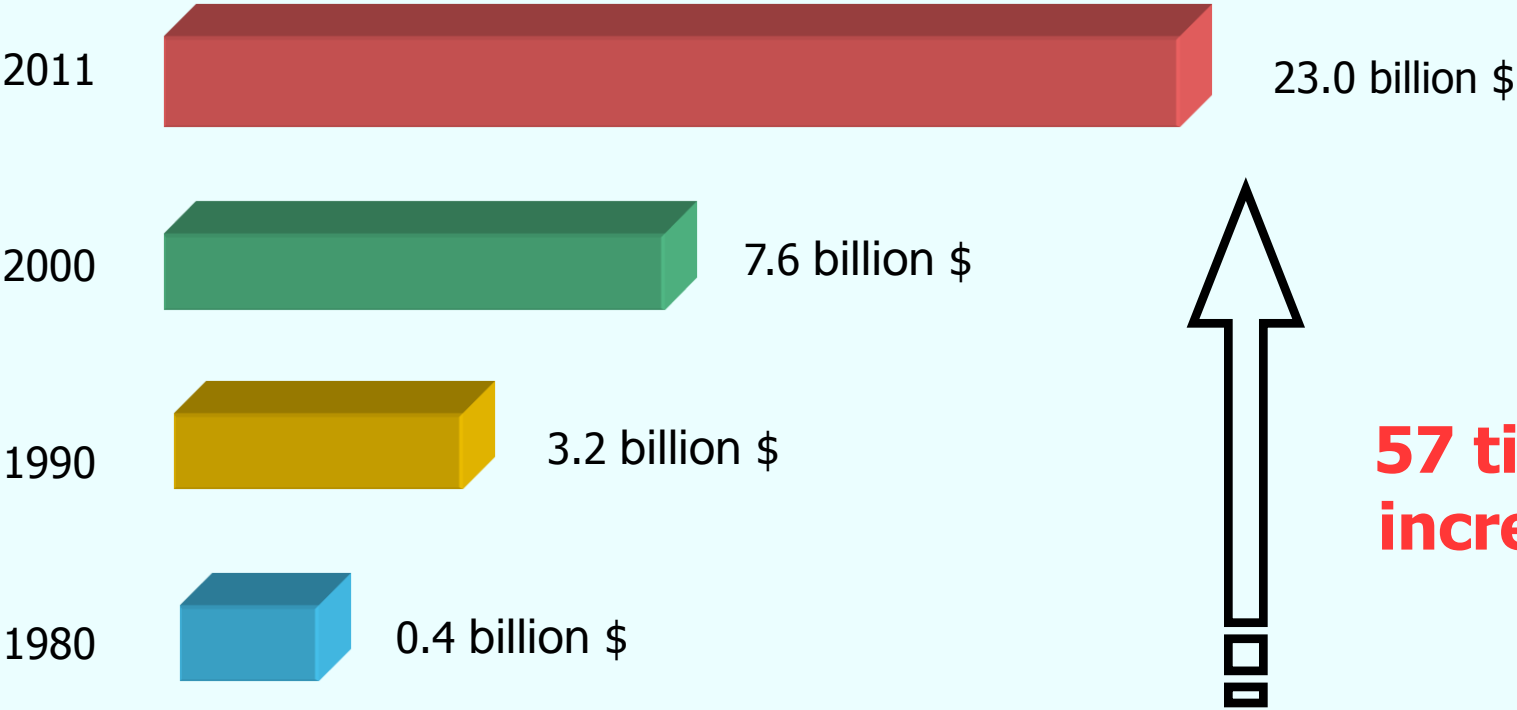
Number of Tourists



# CURRENT SITUATION OF TURKISH TOURISM

## PROGRESS OF TURKISH TOURISM

### Tourism Receipts



# CURRENT SITUATION OF TURKISH TOURISM

## TOURISM STATISTICS - 2011

### Number of Tourists

### Rate of Growth

World : 982 million	→	4.6 %
Europe : 503 million	→	5.8 %
Turkey : 31.4 million	→	9.8 %

### Tourism Receipts

### Rate of Growth

World : 1 trillion USD	→	3.8 %
Europe : 463 trillion USD	→	5.2 %
Turkey : 23 trillion USD	→	10.6 %

# CURRENT SITUATION OF TURKISH TOURISM

## TOURISM WORLD RANKING- 2011

### International Tourist Arrivals (million)

1	FRANCE	77.1
2	USA	62.3
3	CHINA	57.6
4	SPAIN	56.7
5	ITALY	46.1
6	TURKEY	31.4
7	UNITED KINGDOM	28.3
8	GERMANY	28.4
9	MALAYSIA	24.7
10	AUSTRIA	23.0

### International Tourism Receipts (billion \$)

1	USA	116.3
2	SPAIN	59.9
3	FRANCE	46.6
4	CHINA	48.5
5	ITALY	42.9
6	GERMANY	38.8
7	UNITED KINGDOM	32.4
8	AUSTRIA	30.4
9	TURKEY	23.0



# CURRENT SITUATION OF TURKISH TOURISM

## TURKEY TOURISM STATISTICS

### Top Ten Markets- 2011

1	GERMANY	4 826 315
2	RUSSIA	3 468 214
3	ENGLAND	2 582 054
4	IRAN	1 879 304
5	BULGARIA	1 491 561
6	NETHERLANDS	1 222 823
7	GEORGIA	1 152 661
8	FRANCE	1 140 459
9	SYRIA	974 054
10	USA	757 143

# CURRENT SITUATION OF TURKISH TOURISM

## TURKEY TOURISM STATISTICS

### Main Destinations 2011- million person

ANTALYA	10.4
İSTANBUL	8.0
MUĞLA	3.0
CAPPADOCIA	2.5
İZMİR	1.3

# CURRENT SITUATION OF TURKISH TOURISM

## 2023 OBJECTIVES

- ✓ 50 millions visitors
- ✓ 50 billion \$ tourism receipts
- ✓ To be in the first five in terms of number of tourists and tourism revenue.

# **INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES**

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## NEW TOURISTS

- ✓ Make their own holiday organization
- ✓ Go on holiday more frequently for shorter periods
- ✓ Take last minute decisions
- ✓ Follow the social media
- ✓ Consider the brand value
- ✓ Care about the environmental issues
- ✓ Want to live new experiences (Interest for new experiences are spreading to the middle segment)
- ✓ Want to colour their lives by travelling
- ✓ Seek for original arts, crafts, culture, places and experiences

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## BRIC COUNTRIES ARE RISING IN IMPORTANCE

### Travel Expenditures-2011

China	→	+ 38 %
Russia	→	+ 21 %
Brasil	→	+ 32 %
India	→	+ 32 %

### Air Transportation

It is foreseen that marketshare in the international aerial transportation of BRIC countries will be 35% in 2020 and 50% in 2050.

*source: WTTC*

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## BRIC COUNTRIES ARE RISING IN IMPORTANCE

- ✓ In the next 10 years it is foreseen that increase in the international travel from Brasil ( in 2011 6 millions travels occurred) will be more than any travel from other countries.
- ✓ In 2021 It is foreseen that 125 millions Chinese people will make international travel and total travel expenditure will be 100 billion \$.

*Source: WTTC*

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## BRIC COUNTRIES ARE RISING IN IMPORTANCE

### Tourism Demand to Turkey

	2010	2011	2011/2010 (%)
Brasil	65 246	89 442	37.08
Russia	3 107 043	3 468 214	11.62
Indian	63 406	73 731	16.28
China	77 142	96 701	25.35



# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## EUROPE'S POPULATION IS AGING

### Share of population over the age of 60 in general population

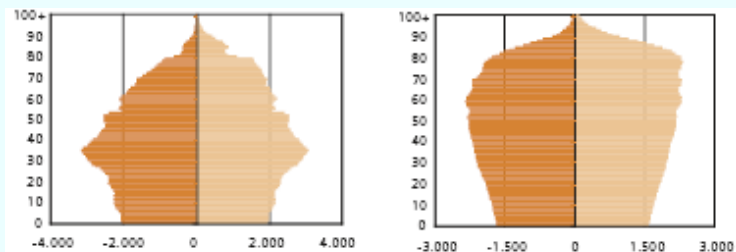
	2000	2020	2050
Germany	22.9%	30%	41%
Spain	21.8%	28%	44%
France	20.7%	29%	38%
Belgium	22.1%	30%	38%
Denmark	19.9%	28%	36%

Because of aging Europe population, types of tourism such as health tourism, ecotourism are coming into prominence.

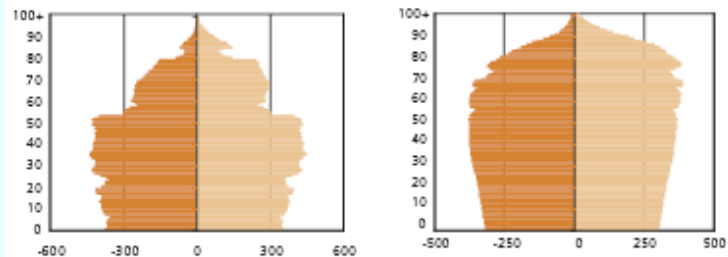
# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## EUROPE'S POPULATION IS AGING

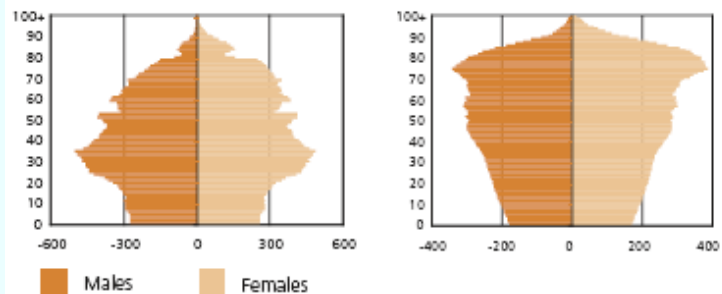
EU  
COUNTRIES



FRANCE



ITALY



# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## SELF ORGANIZATION

- ✓ Cheap airline transport is growing stronger.
- ✓ Online sale by marketing channel is coming into prominence.
- ✓ Mass tourism is gradually giving place to personal travel.

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## TOURISM TYPES

- ✓Types of tourism such as youth, health, golf, gastronomy are increasingly having an important role.
- ✓Tendency to responsible tourism is increasing.
- ✓It is foreseen that cultural tourism will achieve growth more than international tourism by the year 2020.
- ✓Thanks to “Knowledge is power” approach, types of tourism which offer knowledge and kinds of experiences such as ecotourism, adventure tourism, rural tourism in different part of the world are growing stronger.

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## POWER OF DIGITAL

- ✓ As of the end of the year 2011 there are 2.1 billion internet users in the world.
- ✓ Active Facebook users are more than 800 million.
- ✓ It is expected that this number will reach 1 billion at the end of the year 2012.
- ✓ There are 225 (154 millions active) million Twitter users.
- ✓ They post approximately 8,868 tweets per second.
- ✓ There are 1 trillion videos in Youtube.
- ✓ There are 140 youtube videos per capita in the world.
- ✓ There are approximately 40 million blogs in the world.

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## POWER OF DIGITAL

- ✓ While people are deciding on holiday, they are using “travel interpretation” in the internet as the base.
- ✓ Independent travel blogs, friends in social media like Facebook/ Twitter and interpretation shared by foreigners and google research results are more effective than tourist agencies.
- ✓ People who used internet just for surfing earlier are now commenting, sharing photographs, organizing travel and affecting other’s decisions.
- ✓ In European countries not only young population but also middle-aged population are using internet actively.

*Source: WTTC*

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## POWER OF DIGITAL

- ✓ Last-minute bookings are increasing thanks to on-line channels.
- ✓ According to a report by the European Commission, 53% of people who travel in 2011 made their organizations on-line.
- ✓ It is foreseen that the increase in on-line travel marketing between 2010 and 2012 will be two times more than the increase in all travel marketing and reach 313 billion \$.
- ✓ At the end of the year 2012, it is anticipated that one third of purchased travels will be on-line.
- ✓ In 2014 more than 3 billion people of adult population will be acting with mobile or internet technology.

*Source: WTTC*

# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## PERSPECTIVES FOR 2020

### Number of Tourists

World	→	1.6 billion	→	4.1 % growth annually
European	→	717 billion	→	3.1 % growth annually
Asia & Pacific	→	397 billion	→	4.1 % growth annually
America	→	282 billion	→	3.8 % growth annually

Europe's share (2011) → 51%

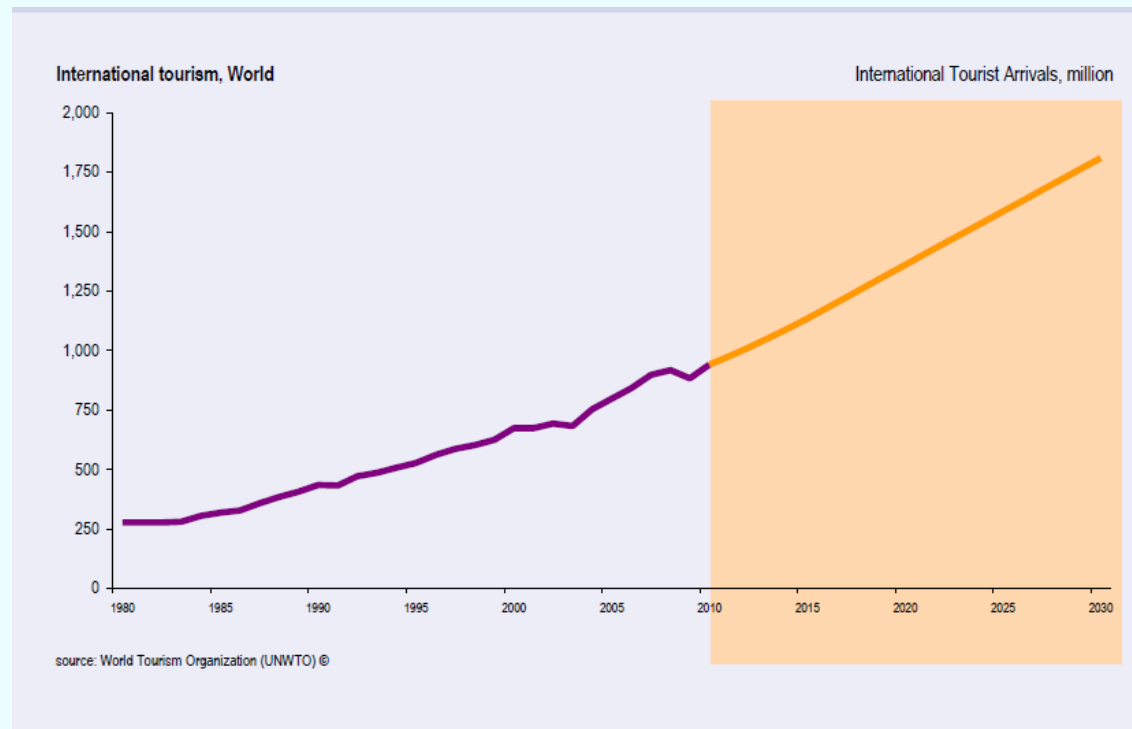
Europe's share (2020) → 46%



# INTERNATIONAL TOURISM TRENDS AND PERSPECTIVES

## PERSPECTIVE FOR 2030

Number of Tourists → 1.8 billion



Source: BMDTÖ

# **GENERAL IMAGE OF TURKEY IN TARGET MARKETS**

# IMAGE OF TURKEY

“Meeting Point of the West and the East”

## Components of Turkey's Image

- ✓ Cradle of civilizations
- ✓ Turkish hospitality
- ✓ Turkish gastronomy
- ✓ Diversity of activities
- ✓ Historical and natural wonders
- ✓ High quality facilities

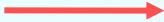
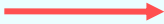
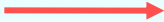

# **TURKEY TOURISM PRODUCT**

# TURKEY TOURISM PRODUCT

## ACCOMMODATION

- ✓ New accommodation facilities at highest quality
- ✓ Qualified and educated staff

### Total Bed Amount of Turkey

1980		82,000
1990		490,000
2000		570,000
2011		945,000

# TURKEY TOURISM PRODUCT

## ACCOMMODATION

### The percentage of hotels younger than 10 years

Turkey	→	44.6%
Spain	→	41.9%
Czech Republic	→	21.3%
Portugal	→	21.2%
Italy	→	19.1%

# TURKEY TOURISM PRODUCT

## ACCOMMODATION

### Hotel Occupancy Rates -2011

1	London	82.4 %
2	Paris	79.0 %
3	Vienna	72.2 %
4	İstanbul	69.9 %
5	Berlin	69.5 %
6	Rome	67.5 %
7	Prag	66.9 %
8	Barcelona	66.3 %
9	Milan	63.1 %
10	Budapest	62.0 %
	European Total	66.3 %

*Source: BMDTÖ*

# TURKEY TOURISM PRODUCT

## ACCOMMODATION

### Hotel Occupancy Rates and Average Prices

#### Country Ranking

2012 - First Quarter

Occupancy Rate (%)			Average Price (Euro)		
1	UK	70,1	1	SWITZERLAND	206,53
2	BELGIUM	67,3	2	FRANCE	148,15
3	SWITZERLAND	66,1	3	NORWAY	130,50
4	TURKEY	66,0	4	RUSSIA	127,92
5	GERMANY	65,8	5	ISRAEL	125,65
6	ISRAEL	65,5	6	ITALY	113,09
7	FRANCE	65,4	7	BELGIUM	112,31
8	AUSTRALIA	64,9	8	HOLLAND	109,54
9	NORWAY	64,2	9	TURKEY	106,65
10	FINLAND	62,9	10	DENMARK	96,57
	European Total	63,7		European Total	100,04

Source: STR Global



# TURKEY TOURISM PRODUCT

## ACCOMMODATION

### Hotel Occupancy Rates and Average Prices

#### City Ranking

2012- First Quarter

Occupancy Rate (%)			Average Prices (Euro)		
1	LONDON	79.6	1	GENEVA	292.56
2	PARIS	77.3	2	PARIS	235.22
3	GENEVA	75.1	3	ZURICH	206.91
4	TEL AVIV	73.7	4	TEL AVIV	183.12
5	İSTANBUL	73.0	5	MOSKOV	155.70
6	MANCHESTER	72.0	6	LONDON	155.35
7	AMSTERDAM	71.9	7	MILAN	139.78
8	ZURICH	71.6	8	ISTANBUL	136.71
9	DUBLIN	70.8	9	AMSTERDAM	132.17
10	WARSAW	70.4	10	ROME	131.23
	Total of European	63.7		Total of European	100.04

Source: STR Global

# TURKEY TOURISM PRODUCT

## SEA TOURISM

- ✓ 8,333 km coast line
- ✓ 355 blue flag beaches (World's Number Four) (2012)
- ✓ 33 marina, 19 of them are with blue flags (2012)
- ✓ Climatic conditions
- ✓ Natural Beauties
- ✓ New and modern accommodation facilities
- ✓ High quality service

*Destinations:* Antalya, Alanya, İzmir, Çeşme, Bodrum, Fethiye, Kuşadası, Marmaris, Didim, Side, Mersin, Belek etc.

# TURKEY TOURISM PRODUCT

## CULTURE / CITY TOURISM

### **Historical and Cultural Richness**

- ✓ 13 big civilizations and historical and cultural values belonging to 3 big religions
- ✓ 171 ongoing archaeological excavation
- ✓ Museums (*Topkapı Palace Museum, Hagia sophia Museum, Zeugma archaeological Museum, Mevlana Museum, Archaeological Museum, Anatolian Civilizations Museum, Ethnography Museum, Boğazköy Museum, Yesemek Outdoor Museum, Turkish and Islamic art Museum, Chora Museum, Ephesus Museum, Birgi Çakırağa Residence*)

# TURKEY TOURISM PRODUCT

## CULTURE / CITY TOURISM

### **11 sites in UNESCO World Cultural Heritage List :**

Historic areas of İstanbul,  
Göreme National Park and Cappadocia,  
Divriği Mosque and ve Darüşşifa,  
Hattuşaş– Boğazköy,  
Mount Nemrut,  
Pamukkale – Hierapolis,  
Xanthos – Letoon,  
Safranbolu Homes,  
Truva Antique City,  
Mosque Selimiye and Social Complex,  
Çatalhöyük Neolithic City

### **37 sites in UNESCO World Cultural Heritage Temporary List**

# TURKEY TOURISM PRODUCT

## CULTURE / CITY TOURISM

### **79 Antique Cities**

Ephesus (İzmir), Perge (Antalya), Aspendos (Antalya), Myra (Antalya), Sagalassos (Burdur), Boğazkale/Hattuşaş (Çorum), Bergama (İzmir), Hierapolis (Pamukkale), Laodikya (Denizli), Zeugma, Yasemek(Gaziantep) etc.

### **Art Activities**

Exhibitions, biennials, carnivals, concerts, activities etc.

# TURKEY TOURISM PRODUCT

## RELIGIOUS TOURISM

### **Monuments Belonging to Three Divine Religions (Judaism, Christianity, Islam);**

- ✓ Hagia Sophia Museum (İstanbul)
- ✓ Mosque Sultanahmet (İstanbul)
- ✓ Mosque Süleymaniye (İstanbul)
- ✓ Church of Santa Claus (Demre/Antalya)
- ✓ Cappadocia,
- ✓ Epheus (İzmir)
- ✓ Church of St. Pierre (Antakya),
- ✓ Aya İrini (İstanbul ),
- ✓ Mosque Selimiye (Edirne)
- ✓ The House of the Virgin Mary (İzmir)
- ✓ Mevlevi Lodge (Konya)
- ✓ Devrulzafaran Monastery (Mardin),
- ✓ Sümela Monastery (Trabzon)
- ✓ Harran (Şanlı Urfa)
- ✓ Divriği Mosque and Hospital (Sivas)

# TURKEY TOURISM PRODUCT

## HEALTH TOURISM

✓ In terms of richness and potential of geothermal resources, Turkey is ranked as the first in Europe, seventh in the World

### ✓ **4 thermal tourism area**

South Marmara, Phrygia, South Aegean and Central Tourism thermal areas

✓ Almost 200 thermal facilities in 46 cities

✓ SPA opportunities

✓ Turkish Baths

✓ 47 hospital accredited by taking JC

# TURKEY TOURISM PRODUCT

## CONVENTION TOURISM

- ✓ Modern convention facilities in İstanbul, Antalya, İzmir and Ankara
- ✓ Convention opportunities of 5 star hotel

### CITY RANKING-2011

1	VIENNE	181
2	PARIS	174
3	BARCELONA	150
4	BERLIN	147
5	SINGAPORE	142
6	MADRID	130
7	LONDON	115
8	AMSTERDAM	114
9	İSTANBUL	113
10	BEIJING	111

*Source: ICCA*



# TURKEY TOURISM PRODUCT

## GOLF TOURISM

18 golf facilities

- ✓ 15 in Belek
- ✓ 2 in İstanbul
- ✓ 1 in Bodrum

### **Antalya/Belek**

Selected "the best Golf Destination of Europe" in 2008 by International Golf Federation (IAGTO).

*World Amateur Golf Championship will be held in Belek in 2012.*

# TURKEY TOURISM PRODUCT

## WINTER TOURISM

Main winter tourism centers:

- ✓ Palandöken
- ✓ Uludağ
- ✓ Kartalkaya
- ✓ Erciyes
- ✓ Sarıkamış
- ✓ Davras

# TURKEY TOURISM PRODUCT

## SHOPPING TOURISM

- ✓ Historical shopping bazaars (İstanbul Grand Bazaar, Egyptian Bazaar, İzmir Kızlarağası Hanı, Ankara Çıkırıkcılar Yokuşu, Gaziantep Coppersmith Bazaar etc.)
- ✓ Modern shopping centers with World Brands
- ✓ "İstanbul Shopping Festival" 18 March - 26 April 2011  
9 June - 29 June 2012
- ✓ "Ankara Shopping Festival " 8 June -1 July 2012

# TURKEY TOURISM PRODUCT

## SPORT AND NATURE TOURISM

- ✓ Surfing
- ✓ Underwater sports
- ✓ Summer camping ground
- ✓ Rafting
- ✓ Mountaineering
- ✓ Trekking
- ✓ Speleology
- ✓ Bird watching
- ✓ Paragliding

# TURKEY TOURISM PRODUCT

## YOUTH TOURISM

- ✓ Camping
- ✓ Fun
- ✓ Sport activities

# TURKEY TOURISM PRODUCT

## GASTRONOMY TOURISM

- ✓ Traditional Ottoman and Turkish cuisine
- ✓ Local cuisine
- ✓ Olive, olive oil
- ✓ Aegean herbs

# TURKEY TOURISM PRODUCT

## IMPORTANT ORGANIZATIONS

- ✓ Convention of Association of British Travel Agents (ABTA) – 10-12 October 2012 / Antalya/Belek
- ✓ Association of Dutch Travel Agents and Tour Operators - October 2012 / İstanbul
- ✓ 400th anniversary of the foundation of diplomatic relations between Turkey and Netherlands - 2012
- ✓ 2012 World Golf Amateur Team Championship - 27 September-7 October 2012 Antalya/Belek
- ✓ 2012 China Culture Year in Turkey, 2013 Turkish Culture Year in China
- ✓ 2013 Mediterranean Games, Mersin
- ✓ Annual Convention of Switzerland Travel Agents Association– October 2013 / İzmir
- ✓ 600th Anniversary of the Foundation of Diplomatic Relations with Poland – 2014
- ✓ ICCA (International Congress and Convention Association) 2014 Congress – Antalya
- ✓ 2015 Australian Year in Turkey and Turkish Year in Australia
- ✓ Botanic EXPO 2016 – Antalya

# TURKEY TOURISM PRODUCT

## IMPORTANT ORGANIZATIONS - NOMINATIONS

- ✓ EXPO 2020 İzmir, "News Routes to a Better World/ Health For All"
- ✓ 2020 Summer Olympics
- ✓ 2020 European Football Championship



# TARGET GROUPS

# TARGET GROUPS

- ✓ 25–44, 44-64 and 65+ age groups
- ✓ Families with children
- ✓ Over middle and high level of education and income
- ✓ Travelling frequently
- ✓ Considering environmental issues
- ✓ Having high brand awareness
- ✓ Interested in activities and other cultures
- ✓ Following social media

# **MARKETING OBJECTIVES**

## MARKETING OBJECTIVES

- ✓ Increasing Turkey's marketing share in main markets and developing markets, preserving in mature markets.
- ✓ Increasing demand from markets such as BRIC countries which grow stronger in respect of international travels
- ✓ Increasing the share of high-income group visitors
- ✓ Increasing per capita tourist expenditure and length of stay
- ✓ Expanding the demand for tourism to 12 months by decreasing seasonality
- ✓ Increasing demand for kinds of tourism such as culture, golf, winter, congress, health, yachting, city, youth, shopping, ecological tourism
- ✓ Ensuring a balanced distribution of tourism to Turkey's different regions.

# **COMMUNICATION OBJECTIVES**

# COMMUNICATION TARGETS

## **As a macro destination:**

- ✓ Strengthening Turkey's image in the world tourism market,
- ✓ Positioning Turkey as a modern and hospitable country with a deep cultural heritage, offering a unique travel experience,
- ✓ Promoting Turkey using different messages from rival countries offering the same promises.

## **Micro destinations:**

- ✓ Establishing an emotional connection between visitors and destinations,
- ✓ Bringing competitive products with comparative advantage into prominence.

**\*Each geographical area or place which becomes a tourist attraction providing unity in itself**  
(Istanbul, Antalya, Izmir, Kapadokya, Muğla, Mersin, Gaziantep, Mardin, Karadeniz, ...etc.)

# COMMUNICATION TONE

Communication tone of the campaign

- ✓ Sincere
- ✓ Friendly
- ✓ Natural
- ✓ Dynamic
- ✓ Impressive

# COMMUNICATION STRATEGY



# COMMUNICATION STRATEGY

- ✓ Narrating travel experience offered by Turkey impressively.
- ✓ Creating creative, attractive and original identity.
- ✓ Narrating Turkey's identity as a macro destination and existing or potential micro destinations' identities to target groups effectively.
- ✓ Underlying the product diversity of Turkey by focusing on culture, health, golf, congress, gastronomy, sport and art activities apart from sea-sand-sun
- ✓ Carrying out projects for promoting international sports, cultural and artistic activities held in Turkey.

# **IMPACT ON TARGET GROUPS**

# CONSUMER OUTCOME

- ✓ Arousing curiosity on people who did not visit Turkey and reaching those who visited Turkey in order to make them come again
- ✓ Making target groups think that visiting Turkey is a matter of prestige enriching them
- ✓ Inspiring interest on tourism types like Culture/city tourism, health tourism, golf tourism, congress tourism, sports and youth tourism, shopping and winter tourism besides 3S tourism
- ✓ Making people talk about the campaign
- ✓ Motivating target groups for making their holidays in Turkey.

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**CAMPAIGN BRIEFING**