REPUBLIC OF TURKEY
MINISTRY OF CULTURE AND TOURISM
DIRECTORATE GENERAL OF PROMOTION
BRIEFING
CURRENT SITUATION OF TURKISH TOURISM
## CURRENT SITUATION OF TURKISH TOURISM

### TOURISM STATISTICS - 2011

<table>
<thead>
<tr>
<th>Number of Tourists</th>
<th>Rate of Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>World : 982 million</td>
<td>4.6 %</td>
</tr>
<tr>
<td>Europe : 503 million</td>
<td>5.8 %</td>
</tr>
<tr>
<td>Turkey : 31.4 million</td>
<td>9.8 %</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tourism Revenue</th>
<th>Rate of Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>World : 1 trillion USD</td>
<td>3.8 %</td>
</tr>
<tr>
<td>Europe : 463 trillion USD</td>
<td>5.2 %</td>
</tr>
<tr>
<td>Turkey : 23 trillion USD</td>
<td>10.6 %</td>
</tr>
</tbody>
</table>
## CURRENT SITUATION OF TURKISH TOURISM

## TURKEY TOURISM STATISTICS

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Top Ten Markets- 2011</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>GERMANY</td>
<td>4 826 315</td>
</tr>
<tr>
<td>2</td>
<td>RUSSIA</td>
<td>3 468 214</td>
</tr>
<tr>
<td>3</td>
<td>ENGLAND</td>
<td>2 582 054</td>
</tr>
<tr>
<td>4</td>
<td>IRAN</td>
<td>1 879 304</td>
</tr>
<tr>
<td>5</td>
<td>BULGARIA</td>
<td>1 491 561</td>
</tr>
<tr>
<td>6</td>
<td>NETHERLANDS</td>
<td>1 222 823</td>
</tr>
<tr>
<td>7</td>
<td>GEORGIA</td>
<td>1 152 661</td>
</tr>
<tr>
<td>8</td>
<td>FRANCE</td>
<td>1 140 459</td>
</tr>
<tr>
<td>9</td>
<td>SYRIA</td>
<td>974 054</td>
</tr>
<tr>
<td>10</td>
<td>USA</td>
<td>757 143</td>
</tr>
</tbody>
</table>
## Main Destinations

### 2011 - million person

<table>
<thead>
<tr>
<th>Destination</th>
<th>Million Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANTALYA</td>
<td>10.4</td>
</tr>
<tr>
<td>İSTANBUL</td>
<td>8.0</td>
</tr>
<tr>
<td>MUĞLA</td>
<td>3.0</td>
</tr>
<tr>
<td>CAPPADOCIA</td>
<td>2.5</td>
</tr>
<tr>
<td>İZMİR</td>
<td>1.3</td>
</tr>
</tbody>
</table>
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
New Tourist

- Making their own holiday organization
- Going on holiday more frequent
- Taking last minute decisions
- Following the social media
- Considering the brand value
- Caring about the environmental issues
- Wants to live new experiences
SAFE 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.
Types of tourism are increasingly having important role such as youth, health, golf, gastronomy.

Tendency to responsible tourism is increasing.

It is being foreseen that cultural tourism will achieve growth more than international tourism by the year 2020.

Thanks to approach of “Knowledge is power” types of tourism which offer knowledge and kinds of experiences in the different part of world are growing stronger such as ecotourism, adventure tourism, rural tourism.
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

SEA TOURISM

✓ 8,333 km coast line
✓ 355 blue flag beaches (World's Number Four) (2012)
✓ 33 marina, 19 of them are 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.
Historical and Cultural Richness

- 13 big civilizations and historical and cultural values belonging to 3 big religions

- 171 ongoing archaeological excavation

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
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.
Monuments Belonging to Three Divine Religion (Jewishness, Christianity, Muslimism);

- 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 is ranked as the first in Europe, seventh in the World in respect of richness and potential of geothermal resources.

4 thermal tourism area

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

Almost 200 thermal amenities in 46 cities

SPA opportunities

Turkish Baths

47 hospital accredited by taking JC
TURKEY TOURISM PRODUCT

CONVENTION TOURISM

✓ Modern convention amenities 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
18 numbers of golf facilities

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

**Antalya/Belek**

Was selected as “the best Golf Destination of Europ” in 2008 by International Golf Federation (IAGTO).

*World Amateur Golf Championship will be held in Belek in 2012.*
Main winter tourism centers:

- Palandöken
- Uludağ
- Kartalkaya
- Erciyes
- Sarıkamış
- Davras
SHOPPING TOURISM

- Historical shopping bazaars (İstanbul Grand Bazaar, Egyptian Bazaar, İzmir Kızlarağası Hanı, Ankara Çikrikçılars Yokuşu, Gaziantep Coppersmith Bazaar etc.)

- Modern shopping centers presenting World Brands

- “İstanbul Shopping Festival” 18 March - 26 April 2011
  9 June - 29 June 2012

- “Ankara Shopping Festival ” 8 June -1 July 2012
SPORT AND NATURE TOURISM

- Surfing
- Underwater sports
- Summer camping ground
- Rafting
- Mountaineering
- Trekking
- Speleology
- Bird watching
- Paragliding
Camping
Fun
Sport activities
GASTRONOMY TOURISM

- Traditional Ottoman and Turkish cuisine
- Olive, olive oil
- Aegean herbs
TARGET GROUPS
TARGET GROUPS

- 25–44, 44-64 and 65+ age groups
- Families with children
- Over the 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
COMMUNICATION
OBJECTIVES
Turkey as a macro destination:

✓ Strengthening her image in the world tourism market,
✓ Positioning her as a modern and hospitable country having a deep cultural heritage, offering a unique travel experience,
✓ Promoting her using different messages from rival countries offering same promises.
Communication tone of the campaign

- Sincere
- Friendly
- Natural
- Dynamic
- Impressıve
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 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, art activities held in Turkey.
CONSUMER OUTCOME
CONSUMER OUTCOME

✓ Making a sensation on people who did not visit Turkey and reaching people who visited Turkey in order to make them come again

✓ Making target groups think that visiting Turkey adds value and enriches 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 on taking their holiday in Turkey.