

REPUBLIC OF TURKEY

MINISTRY OF CULTURE AND TOURISM

DIRECTORATE GENERAL OF PROMOTION

BRIEFING

CURRENT SITUATION OF TURKISH TOURISM

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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 Revenue

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

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 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

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 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.

IMAGE OF TURKEY

“A harmony of West and 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

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.

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,
Hattuşas– 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 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 TOURISM PRODUCT

HEALTH TOURISM

✓ 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

TURKEY TOURISM PRODUCT

GOLF TOURISM

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.

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 Çıkırıkçılar 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

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
- ✓ 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

COMMUNICATION TARGETS

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

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 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.