

ADVERTISEMENTS TENDER - 2014 CAMPAIGN INFORMATION REPORT

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INTRODUCTION

Turkey has taken giant steps in economic, social and cultural aspects in the last decade. The size of Turkish economy has reached to 800 billion US\$, and became the 17th largest economy of the world, the sixth largest one in Europe. During these years, Turkey has embraced culture of democracy to a deeper extent, found stability in every field, and become a worldwide brand. As an extension of the same process, the image of the country has also changed. However, that change was yet to bring the image of Turkey to the desired level since “image of a country” is a joint product of long-lasting and complex processes. A general overview would indicate that a marked difference has been appearing between the current status of the image of Turkey and its perceived extent. Due to this difference, the level of development attained by our country in recent years is not perceived by the wider world to the extent due. The current status has brought forth problems in reputation management.

The Ministry of Culture and Tourism considers the eradication of the above-referred problem, and the continuation of worldwide activities which bridges the gap between the perceived image and the realities of Turkey as its prime tasks. The Ministry carries out worldwide promotion, advertisement, tourism and culture fairs, joint cultural projects, and public relations activities. Those activities are regarded quite important in attracting more visitors to our country and in promoting the positive perception of our country.

Along with the activities of the Ministry, it is of great importance to produce a strategy which positively contributes to the image of Turkey. Within that context, a global integrated marketing strategy is planned to be implemented across the world.

This *Information Report* is prepared to provide guidance to the applicants, who would submit bids to the “Tender of Advertisement 2014”, for the preparation of their campaign proposals.

I. WORLD TOURISM: TODAY

According to the United Nations World Tourism Organisation (UNWTO), the international tourism (overnight visitors and passenger carriage) represents 30 per cent of the world's export of services, and 6 per cent of the total exports of goods and services of the world. The tourism ranks fifth in the World's exports sectors which are petroleum, chemical, food, and automotive industries.

1. Assessment of 2012

According to the data of the United Nations World Tourism Organisation, the tourism market of the world grew by 4 per cent in 2012, and the international tourist arrivals reached to 1,035 million. More than half of those arrivals (535 million) were welcomed in European countries.

2012	Number of Arrivals	Rate of Growth
World	1,035 million	4 %
Europe	535 million	3.3 %

Tourism receipts on the international tourism arrivals was 1,075 billion US\$. European countries has accounted for 457 billion US\$ of the total tourism receipts.

2012	Tourism Receipts	Rate of Growth
World	1,075 billion USD	4 %
Europe	457 billion USD	2 %

2. Assessment of 2013

- According to the report entitled "European Tourism 2013 – Trends & Prospects" published by the European Travel Commission in the first quarter of 2013, tourism in whole Europe has maintained a tempered growth in the first quarter of 2013. The economic developments in Europe in the remainder of 2013 are expected to directly influence the continent-wide tourism performance.
- According to the Forecast of Economic Growth by the IMF, the global economic recession is reduced and a trend of tentative global economic growth is projected. The economic situation of the countries is directly reflected on their tourist arrivals.

	2011	2012	Projections	
			2013	2014
World Output	3.9	3.2	3.5	4.1
Advanced Economies	1.6	1.3	1.4	2.2
United States	1.8	2.3	2.0	3.0
Euro Area	1.4	-0.4	-0.2	1.0
Germany	3.1	0.9	0.6	1.4
France	1.7	0.2	0.3	0.9
Italy	0.4	-2.1	-1.0	0.5
Spain	0.4	-1.4	-1.5	0.8
Japan	-0.6	2.0	1.2	0.7
United Kingdom	0.9	-0.2	1.0	1.9
Canada	2.6	2.0	1.8	2.3
Other Advanced Economies	3.3	1.9	2.7	3.3
Newly Industrialized Asian Economies	4.0	1.8	3.2	3.9
Emerging and Developing Economies	6.3	5.1	5.5	5.9
Central and Eastern Europe	5.3	1.8	2.4	3.1
Commonwealth of Independent States	4.9	3.6	3.8	4.1
Russia	4.3	3.6	3.7	3.8
Excluding Russia	6.2	3.9	4.3	4.7
Developing Asia	8.0	6.6	7.1	7.5
China	9.3	7.8	8.2	8.5
India	7.9	4.5	5.9	6.4
ASEAN-5 ¹	4.5	5.7	5.5	5.7
Latin America and the Caribbean	4.5	3.0	3.6	3.9
Brazil	2.7	1.0	3.5	4.0
Mexico	3.9	3.8	3.5	3.5
Middle East and North Africa	3.5	5.2	3.4	3.8
Sub-Saharan Africa	5.3	4.8	5.8	5.7
South Africa	3.5	2.3	2.8	4.1

- In some European countries (Britain, Italy, Spain, Netherlands, etc.) the lingering effects of the economic recession and increasing prices of journeys abroad increases the interest for the domestic market.
- The key factor of the growth in Europe will cause the demand to rise in the far markets (especially China, Japan, USA, and India).

3. UNWTO Tourism Towards 2020 Forecasts

UNWTO forecasts 4,1 percent average annual growth in international tourist arrivals until 2020, and the international tourist arrivals received will be 1,6 billion in 2020.

World	1.6 billion	average annual growth 4.1 per cent
Europe	717 million	average annual growth 3.1 percent
Asia Pacific	397 million	average annual growth 4.1 percent
Americas	282 million	average annual growth 3.8 percent

II. TRENDS IN TOURISM

- Mass tourism is gradually replaced by individually arranged journeys.
- Besides the sun and sea, increasing number of people travels abroad for culture, religion, youth, health, golf, culinary, and medical tourism.
- Until 2020 culture tourism is forecasted to grow more than the international tourism.
- Cities are outperforming countries, and became single stronger brands.
- Peoples' attachment to destination brands is rising.
- Tourism variants such as eco-tourism, adventure tourism, and rural tourism that follow the maxim "knowledge is power" and offering diverse experiences and knowledge at distinct places of the world are getting stronger.
- Travelling public does not want to feel "like a tourist" at the destination. They would like to sample the daily life there and interact with the local people.
- Gradually the allure of adventure tourism attracts diverse age groups and income levels.
- Remarkably short and frequent holidays with higher travel prices are becoming noticeable.
- Low cost flights and strengthening digital channels put independent holidays to the forefront..
- The preference of encountering original crafts, arts, culture, spaces, and experiences are rising.
- Sustainable tourism approach makes people more sensitive to environment, culture, and nature.
- Travel plans are susceptible to last minute change. According to a report of the TripAdvisor, for example, 40 per cent of people who made reservations change their mind at the last moment and look for another destination.

Source: ITB-2013, Hotel Resort & Insider-2013

1. Population in Europe is getting older

As the average age of global population increases, the age groups who can travel public changes, too.

According to the report of ITB 2013, 23 per cent of those who can travel in 2012 are aged 55 or over, 35 per cent are in the category of 15-34 age groups, while 42 per cent are of 35-54 age groups.

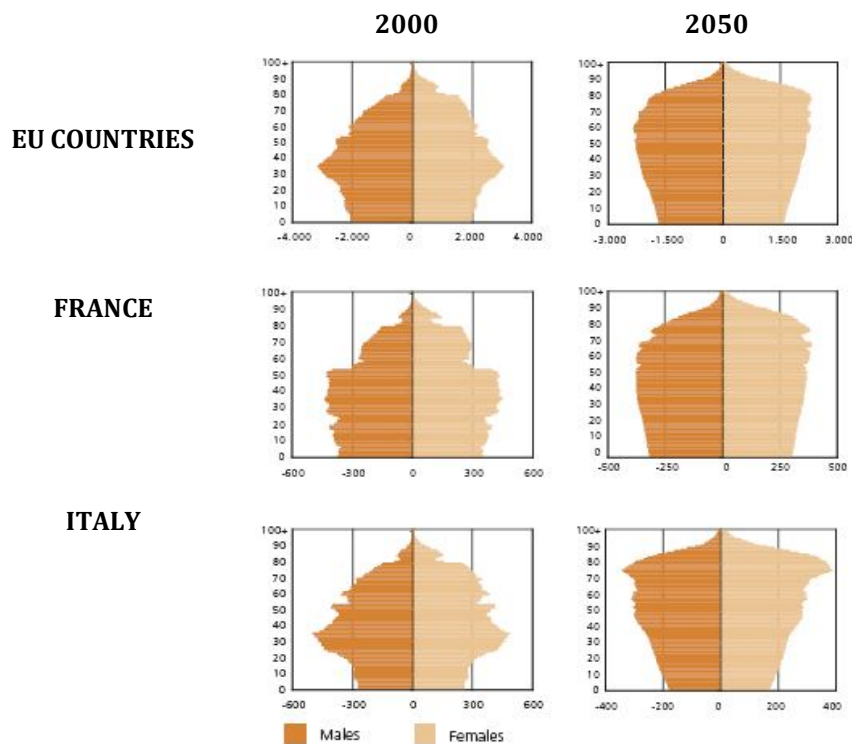
Furthermore the increasing average age of population in European countries, principally Germany, Spain, France, Belgium, and Scandinavia, is predicted to accelerate, and population over 60 years of age in some countries is expected to exceed 40 per cent by 2050.

Proportion of aged 60+ in the 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%

Source: Eurostat

European Population Pyramids



As the European population is getting older, the tourism variants, such as medical tourism, eco tourism, are becoming more prominent.

2. The Significance of Digital Media is increasing

- The share of online sales among the travel sales channels is steadily increasing. According to a European Commission Report, 54 per cent of travel sales in 2012 were made on the internet while 24 per cent were made through the travel agents.
- The social media and bloggers greatly affect the travel decisions and habits. The Google search results are more effective than those of the guidance provided by travel agents.

- Those who use internet for surfing add their comments, share photographs, plan travels, and affect each other's decisions these days.
- The young and middle aged population use internet actively in European countries.
- Last minute's reservations are on the rise owing to the merits of on-line channels.

Source: WTTC

3. Importance of BRIC Countries in Tourism is on the Rise

Tourism Expenses - 2012

China	+40 per cent
Russia	+31 per cent
Brazil	+32 per cent
India	+32 per cent

Source: UNWTO

- While 10 million Chinese travelled internationally in 2000, it reached to 83 million in 2012. However, a mere 2.5 million travelled through Europe.
- Chinese tourists expenditure has increased by 8 times over the last decade, and reached to 102 billion US\$ in 2012.
- Russia was ranking 5th in tourism expenses in 2012 which represented a 32 per cent increase (to 43 billion US\$).
- A marked increase was recorded in the tourism expenses of Brazilian visitors. Brazil was ranking 29th in tourism expenses in 2005, but moved up to ranking 12th with 22 billion US\$ in 2012.
- Over the next ten years, the increase in international travel in Brazil is expected to be greater than that of all other countries.

III. TOURISM MARKET OF TURKEY

Population: 75.6 million

Average Age: 30,1

GDP: 786 billion US\$ (2012)

GDP per Capita: 10,300 US\$

Growth Rate: 2,2 per cent (2012)

The 17th largest economy of the world

Turkey has recorded the highest average growth (5.1 per cent) in the period between 2003 and 2012 among the OECD Countries.

OECD projects that it will grow with an average rate of 4.3 until 2023, and become the champion of growth among the OECD Countries.

1. Last Decade of Tourism in Turkey

The number of visitors arriving in Turkey in 2002 was 15.2 million; in 2012, this figure reached to 36.7 million.

The tourism receipts of Turkey in 2002 was 12.4 billion US\$; in 2012 this figure reached to 29.3 billion US\$.

The number of visitors excluding the Turkish citizens living abroad in 2012 was 31.7 million.

	NUMBER OF TOURIST ARRIVALS (Including Turkish Citizens)	TOURISM RECEIPT (Billion US\$)
2002	15 214 514	12.420
2003	16 302 053	13.854
2004	20 262 640	17.076
2005	24 124 501	20.322
2006	23 148 669	18.593
2007	27 214 988	20.942
2008	30 979 979	25.415
2009	32 006 149	25.064
2010	33 027 943	24.930
2011	36 151 328	28.115
2012	36 776 645	29.351

Turkey is ranking 6th among the countries with most international tourist arrivals in 2012.

NUMBER OF INTERNATIONAL TOURIST ARRIVALS IN 2012

1	FRANCE	77.1
2	USA	62.3
3	CHINA	57.6
4	SPAIN	56.7
5	ITALY	46.1
6	TURKEY	31,7
7	UNITED KINGDOM	28.3
8	GERMANY	28.4
9	MALESIA	24.7
10	AUSTRIA	23.0

While the main markets of Turkey are Germany, Russia, and United Kingdom; and its emerging markets are countries in the Middle East and Balkans; its recent developing markets are China, Japan, India, and Brazil.

Countries that send most tourist to Turkey –2012

COUNTRIES	2012	2011	2010
Germany	5 028 745	4 826 315	4 385 263
Russian Fed.	3 599 925	3 468 214	3 107 043
United Kingdom	2 456 519	2 582 054	2 673 605
Bulgaria	1 492 073	1 491 561	1 433 970
Georgia	1 404 882	1 152 661	1 112 193
Holland	1 273 593	1 222 823	1 073 064
Iran	1 186 343	1 879 304	1 885 097
France	1 032 565	1 140 459	928 376
USA	771 837	757 143	642 768
Syria	730 039	974 054	899 494
Others	12 806 311	11 961 488	10 491 331
Total	31 782 832	31 456 076	28 632 204

2. Our Principal Destinations

The top touristic destinations of our country are Antalya (10.3 million), Istanbul (9.3 million), Mugla (3 million), Cappadocia (2.5 million), and Izmir (1.3 million).

	International Tourist Arrivals		
	2012	2011	2012/2011
Antalya	10 298 769	10 464 425	% 1,58
Istanbul	9 383 054	8 056 390	% 16,47
Mugla	2 986 629	3 076 508	- % 2,92
Cappadocia	2 571 821	2 511 904	% 2,3
Izmir	1 368 251	1 370 018	- % 0,13

The international arrivals between January-June increased by % 16,8 to Istanbul, %7 to Antalya, %3 to Mugla, %10 to Cappadocia and %2 to Izmir.

	January-June 2013	January-June 2012	Change
Istanbul	4 941 118	4 231 419	% 16,8
Antalya	4 326 057	4 019 519	% 7,6
Mugla	1.047.525	1.016.356	% 3
Cappadocia	1 209 541	1 095 189	% 10,4
Izmir	507 980	497 458	% 2,1

Furthermore, the international arrivals from Arab countries to Istanbul between January-June 2013 period has increased by 50 per cent. The increase partially attributes to the prime time serials of various Turkish TV channels that broadcast in the region, and creates considerable interest.

3. TARGETS OF 2023

50 million international arrivals

50 billion US\$ tourism receipts

Finding a place in the top five with regard to international arrivals and tourism receipts

IV. TOURISM PRODUCT OF TURKEY

1. Sea Tourism

- 8,333 km shore line
- Climatic conditions
- Natural beauty
- Blue Flag beaches and marinas
- New and modern accommodation facilities
- High Quality Service

Blue Flag Beaches: There are 383 Blue Flag Beaches in Turkey. Also, 21 marinas and 13 yachts were awarded Blue Flags. After Spain and Greece, Turkey is the third in most Blue Flag awarded countries.

Principal Sea Tourism Destinations: Antalya, Alanya, Izmir, Çeşme, Bodrum, Fethiye, Kuşadası, Marmaris, Didim, Side, Mersin, Belek, Aydın, etc.

2. Culture/City Tourism

Historical and cultural heritage

- Historical and cultural heritage of 13 great civilisations and 3 major religions
- Ongoing archaeological excavations at 171 sites

Principal Museums: Topkapi Palace Museum, Ayasofya (Hagia Sophia) Museum, Zeugma Mosaic Museum, Goreme Open-air Museum, Mevlana Museum, Istanbul Archaeology Museum, Anatolian Civilizations Museum, Ethnographic Museum, Bogazkoy Museum, Turkish and Islamic Arts Museum, Kariye Museum (The Chora Church), Ephesus Museum etc.

Our sites in the UNESCO World Heritage List

1. Historical Places of Istanbul
2. Goreme National Park and Rock Sites of Cappadocia
3. Great Mosque and Hospital of Divrigi
4. Hattusha: the Hittite Capital
5. Mount Nemrut
6. Xanthos - Letoon
7. Hierapolis-Pamukkale
8. City of Safranbolu
9. Archaeological Site of Troy
10. Selimiye Mosque and the Social Complex in Edirne
11. Neolithic Site of Catalhoyuk

Also 37 sites of our country is included in the Temporary List of World Heritage.

Ancient Cities

There are 79 ancient cities in Turkey.

Principal Ancient Cities: Ephesus (Izmir), Perga (Antalya), Aspendos (Antalya), Sagalassos (Burdur), Catalhoyuk (Konya), Bogazkale/Hattusha (Corum), Pergamon (Izmir), Hierapolis (Pamukkale), Myra (Antalya), Laodicea on the Lycus (Denizli), Zeugma (Gaziantep), Gobeklitepe (Sanliurfa), etc.

Art Activities

Exhibitions, biennials, festivals, concerts, performances, etc.

3. Religious Tourism

Principal Monuments of Three Abrahamic Religions (Judaism, Christianity, Islam):

- Hagia Sophia Museum (Istanbul)
- Sultanahmet Mosque (Istanbul)
- Süleymaniye Mosque (Istanbul)
- St Nicholas of Myra (Santa Claus) Church (Demre/Antalya)
- Cappadocia,
- Ephesus (Izmir)
- St Pierre Church (Antakya),
- Hagia Irene (Istanbul),
- Selimiye Mosque (Edirne)
- House of the Virgin Mary (Izmir)
- Lodge of Mevlevi Dervishes (Konya)
- Deyr ul-Zafaran Monastery (Mardin),
- Sumela Monastery (Trabzon)
- Harran (Sanlı Urfa)
- The Grand Mosque and Hospital of Divrigi (Sivas)

4. Health Tourism

- In terms of the number and potential of geothermal resources, Turkey ranks 1st in Europe and 7th in the world.
- There are 4 thermal tourism regions
- Southern Marmara, Phrygia, Southern Aegean and Central Anatolia thermal tourism regions
- Almost 200 thermal spring facilities in 46 provinces
- Spa availability
- Turkish Baths
- JCI Accredited 47 hospitals

5. Convention Tourism

Istanbul is ranking 9th among the international convention cities in 2012, and first among the conventions with 500+ participants.

Convention Tourism Cities Ranking in 2012

1	Vienna	195
2	Paris	181
3	Berlin	172
4	Madrid	164
5	Barcelona	154
6	London/Singapore	150
7	Copenhagen	137
9	Istanbul	128
10	Amsterdam	122

6. Golf Tourism

There are 18 golf courses (championship courses) in Turkey.

- In Belek 15
- In Istanbul 2
- In Bodrum 1

IAGTO (International Association of Golf Tour Operators) selected Belek (Antalya) as the “Best Golf Destination (in Europe)” in 2008.

In 2012 the World Amateur Team Championship was held in Belek.

7. Winter Tourism

Principal Winter Tourism Destinations

- Palandoken
- Uludag
- Kartalkaya
- Erciyes
- Sarıkamis
- Davras etc. winter tourism centres

8. Nature Sports

- High Pastures tourism
- Surf/sail
- Underwater sports
- Rafting
- Mountaineering
- Trekking
- Caving
- Bird watching
- Paragliding

Principal Destinations of Nature Sports: Black Sea Region, Mediterranean Region, Aegean Region

9. Shopping Tourism

- Historic shopping places (Istanbul Grand Bazaar, Egyptian Bazaar, Izmir Kızlaragası Inn, Ankara Cıkırcılar Yokuşu (Winder Slope), Gaziantep Bakırcılar Çarsısı (Coppersmiths' Market), etc.)
- Modern shopping malls offering the world brands

Shopping Festivals: İstanbul Shopping Festival and Ankara Shopping Festival

10. Youth Tourism

- Camping
- Entertainment
- Sports activities

11. Culinary Tourism

- Traditional Ottoman and Turkish cuisine

V. NOMINATIONS TO IMPORTANT INTERNATIONAL ORGANISATIONS

- EXPO 2020 Izmir, “New Routes to a Better World / Health for All”
- 2020 Summer Olympics
- 2020 European Football Championship

VI. GENERAL IMAGE OF TURKEY IN TARGET MARKETS

“Meeting Point of East and West”

Constituents of the Image of Turkey

- Cradle of Civilisations
- Historic and natural heritage
- Turkish hospitality
- Traditional Turkish Cuisine
- Variety of Tourism
- High quality tourist resorts

VII. PROMOTION STRATEGY AND TARGETS OF TURKEY

1. Target Audience

- Age groups 25–44, 44-64, and 65+
- Families with children
- Levels of education and income are medium or higher.
- Persons travelling quite frequently
- Ecologically sensitive people
- People with great awareness of brands
- People interested in activities and other cultures
- People following social media

2. Marketing Targets

- Increasing Turkey's market share in target markets
- Increasing the share of upper income level group visiting our country
- Increasing per capita expenditure and duration of stay
- Reducing seasonality, and spreading tourism demand over 12 months
- Increasing demand to tourism variants such as culture, golf, winter, convention, health, yachting, city, youth, shopping, and eco-tourism
- Ensuring a balanced distribution over the tourism regions

3. Communication Strategy and Targets

- Strengthening the image of Turkey in the world tourism market,
- Creating an original, attractive and unique identity
- Positioning Turkey as a country with a deeply-rooted cultural heritage offering a matchless travelling experience, and a modern hospitable country
- Introducing the travel experiences Turkey offers strikingly
- Promoting with messages dissimilar to the messages of rival countries who offered similar promises.
- Promoting principal destinations such as Istanbul, Antalya, Izmir, Mugla, Cappadocia, Black Sea, Nemrut, Mardin, Gaziantep, etc., at the forefront.
- Stressing the variety of product range by focusing on travel motivations such as culture, health, golf, convention, culinary, sports and artistic activities, and shopping to diversify from sea-sand-sun.
- Stressing the hospitality of the Turkish people and adding human aspect in promotions by presenting segments of daily life.

4. The Intended Impact on the Target Audience

- Prompting interest in those who have not visited Turkey yet, and creating the desire to revisit Turkey among those who travelled Turkey
- Motivating target audience to have their holidays in Turkey.
- To make sure that the target audience consider visiting Turkey a matter of prestige and add value to this prestige
- Prompting interest in tourism varieties such as culture-city, health, golf, convention, sport, youth, shopping, winter, etc., besides the Sea-Sand-Sun tourism
- To make sure that the campaign is a topic of conversation (vital impact).