

# Tourism Industry in Turkey



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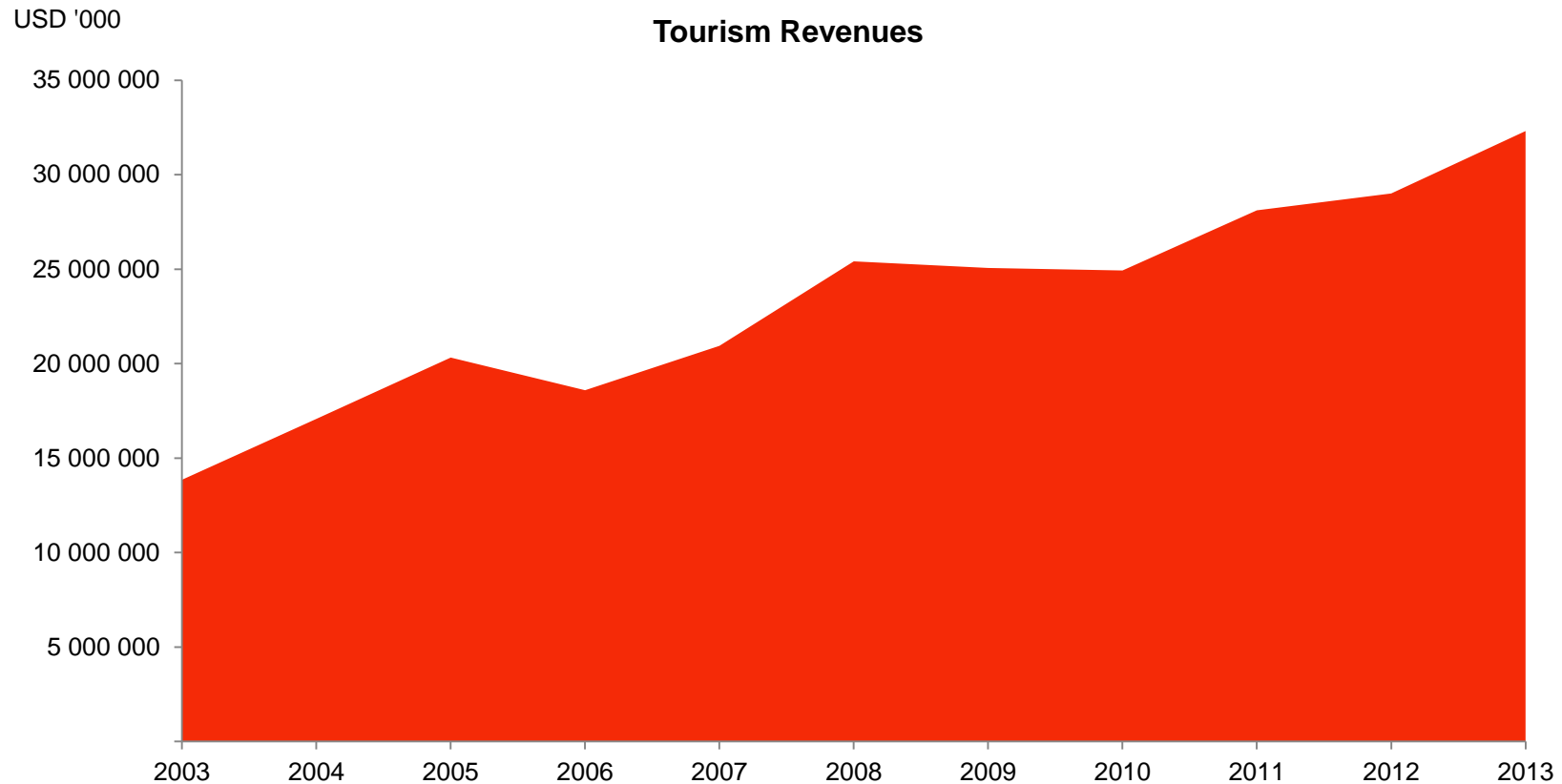
## ▶ Introduction

- One of the world's **most popular** tourism destinations thanks to:
  - **Natural** attractions
  - Four different **seas** with long summers
  - Unique **historical** and **archaeological** sites, crossroad for many ancient civilizations
  - Improving touristic **infrastructure**
  - Tradition of **hospitality**
- An ideal destination **not only** for sun, sea and sand, but also for:
  - **Golf** Tourism
  - **Yacht** Tourism
  - **Congress** Tourism
  - **Winter** Sports
  - **Health & Thermal** Tourism
  - **Faith** Tours
  - **Mountaineering**
  - **Underwater** Diving
  - **Rafting**



## ► Tourism Revenues

- Tourism revenues reached **USD 32.3 bn** in 2013.
- The annual average growth rate btw. 2003 and 2013 was **8.8%**.





# B. Visitors

## ▶ Number of Visitors

- Turkey ranks **6<sup>th</sup>** in terms of tourist arrivals.

International Tourist Arrivals, 2012		
Ranking	Country	mn people
1	France	83.0
2	USA	67.0
3	China	57.7
4	Spain	57.7
5	Italy	46.4
<b>6</b>	<b>Turkey</b>	<b>35.7</b>
7	Germany	30.4
8	UK	29.3
9	Russia	25.7
10	Malaysia	25.0

Source: World Tourism Organization (UNWTO), 2013

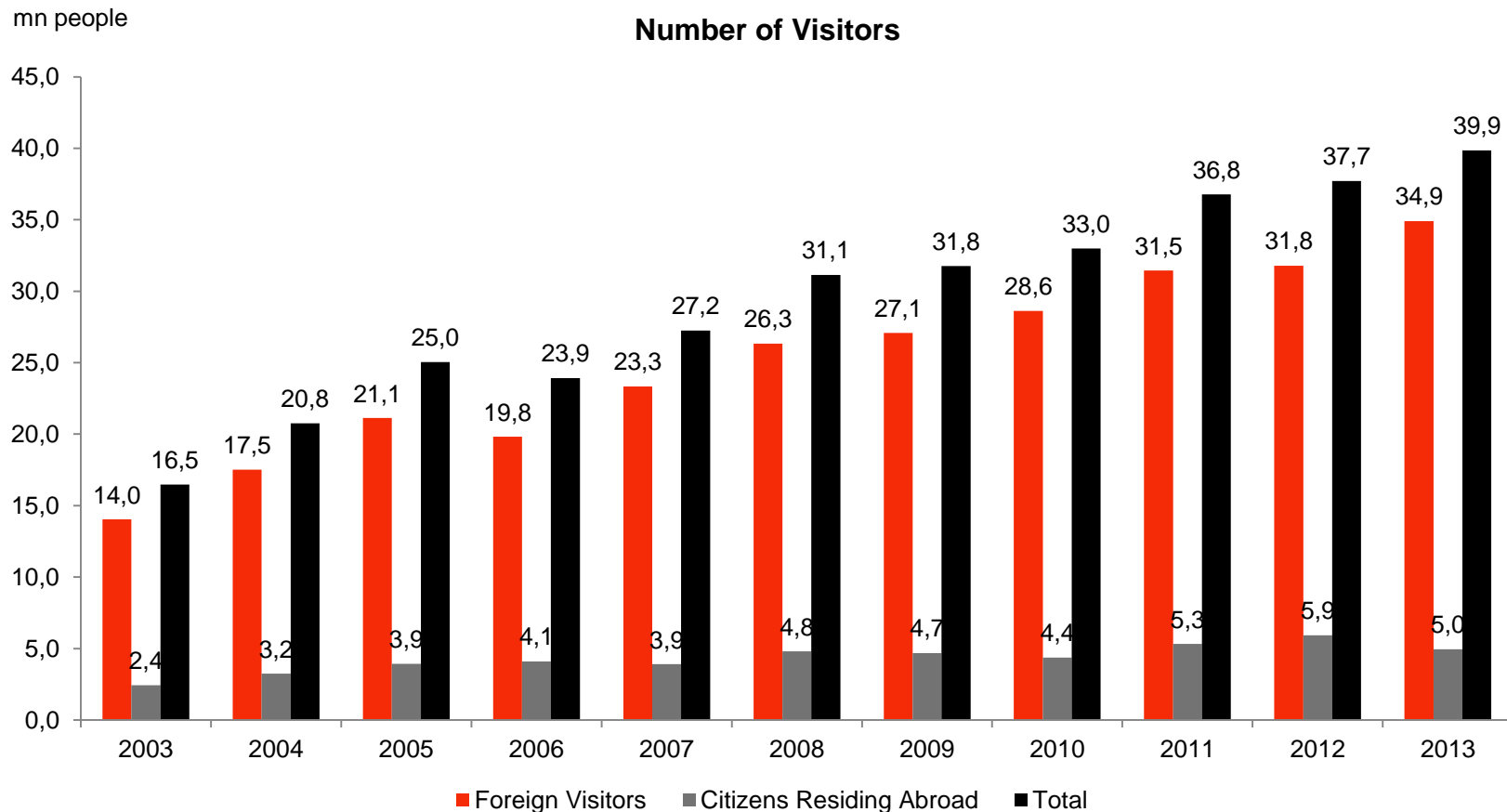
- **6,877** travel agencies in 2012. (Source: Ministry of Culture and Tourism, 2013)
- **13,628** tourist guides in 2012. (Source: Ministry of Culture and Tourism, 2013)



# B. Visitors

## ▶ Number of Visitors

- **9.2%** average annual growth in the number of foreign visitors btw. 2003 and 2013.





## ▶ Nationalities of Visitors

- **Germany, Russia and UK** are the main countries where visitors come from.

Nationalities of Visitors		
Nationality	Number of Visitors, 2013	Share %
Germany	5,041,323	14.4%
Russia	4,269,306	12.2%
UK	2,509,357	7.2%
Georgia	1,769,447	5.1%
Bulgaria	1,582,912	4.5%
Netherlands	1,312,466	3.8%
Iran	1,196,801	3.4%
France	1,046,010	3.0%
USA	785,971	2.3%
Ukraine	756,187	2.2%
Other	14,640,318	41.9%

Source: Ministry of Culture and Tourism, 2014



## B. Visitors

### ► Means of Transport & Provinces of Entry

- Main provinces of entry are **Antalya, Istanbul** and **Mugla**.
- **71%** of the foreigners arrive by airways.

Distribution of Foreigners Arriving in Turkey by Provinces of Entry and Means of Transport - 2013

	Means of Transport				Total	Share %
	Air	Land	Train	Sea		
ANTALYA	10 905 129	-	-	215 601	<b>11 120 730</b>	31.9%
ISTANBUL	9 869 794	-	-	616 503	<b>10 486 297</b>	30.0%
MUGLA	2 566 477	-	-	496 212	<b>3 062 689</b>	8.8%
EDIRNE	-	2 828 930	11 549	-	<b>2 840 479</b>	8.1%
ARTVIN	1 703	1 879 695	-	56	<b>1 881 454</b>	5.4%
IZMIR	865 796	-	-	532 663	<b>1 398 459</b>	4.0%
Other	662 860	2 721 326	17 430	718 374	<b>4 119 990</b>	11.8%
Total	24 871 759	7 429 951	28 979	2 579 409	<b>34 910 098</b>	100.0%
Share %	71.2%	21.3%	0.1%	7.4%	<b>100.0%</b>	

Source: Ministry of Culture and Tourism, 2014



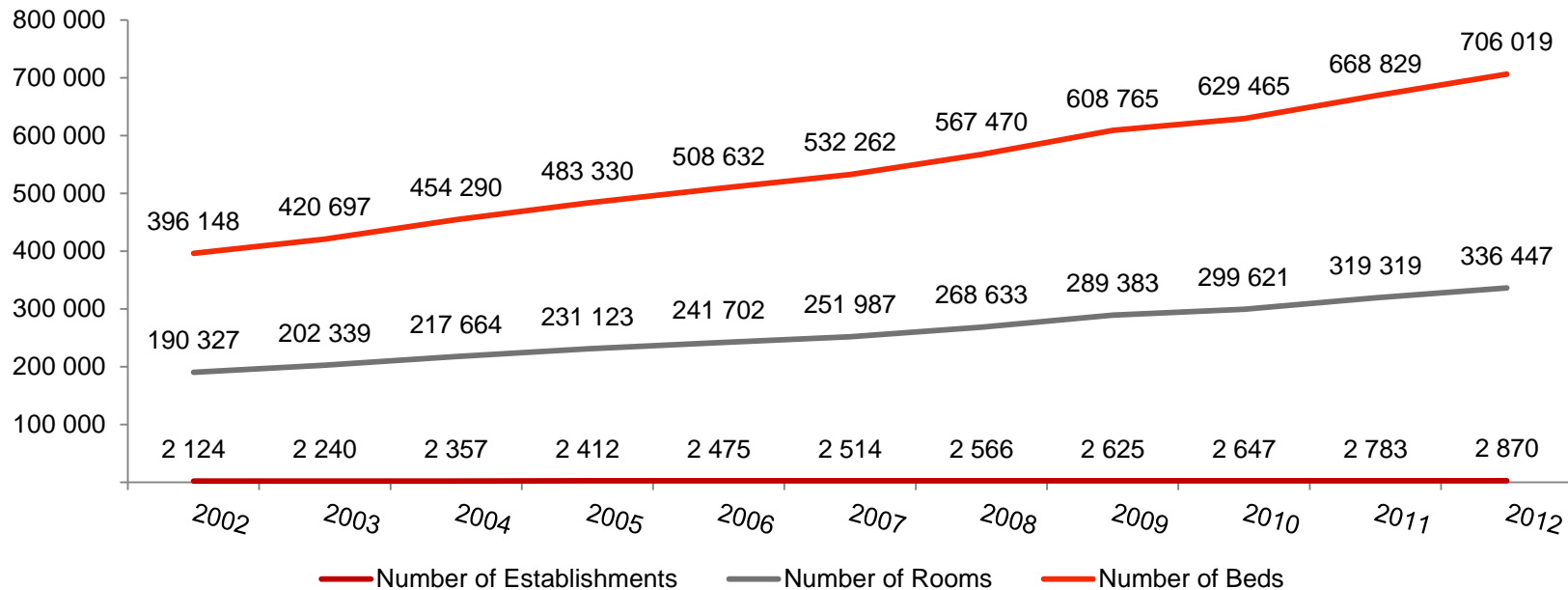


# C. Tourism Infrastructure

## ▶ Accommodation Establishments

- **2,870** accommodation establishments and **706 thousand** beds in 2012.

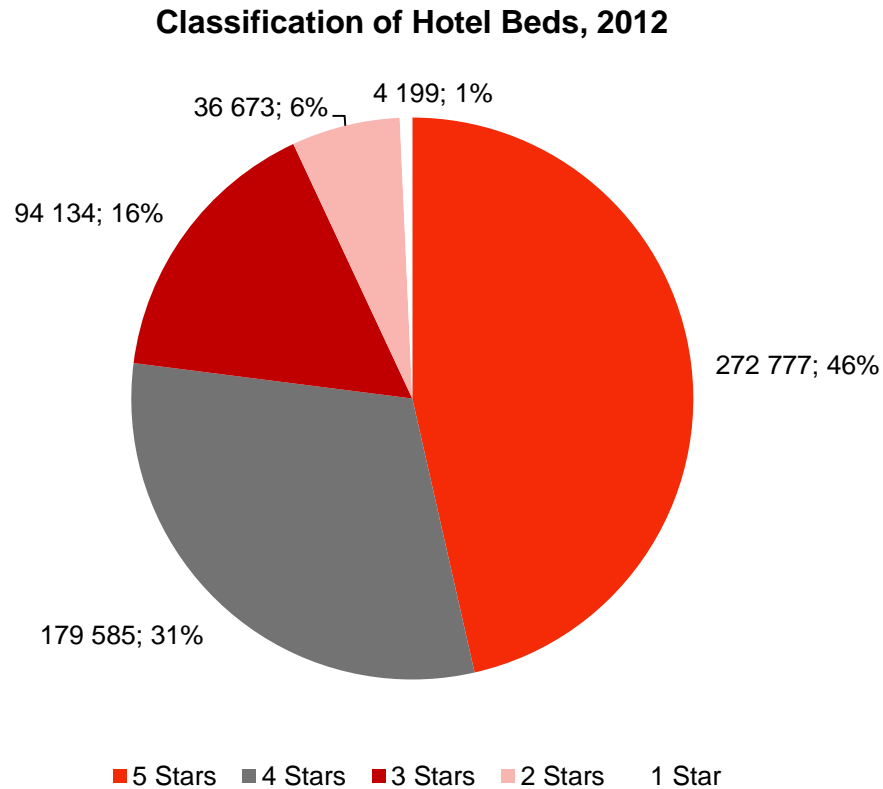
Number of Tourism Operation Licenced Accommodation Establishments





## ▶ Hotel Beds

- **706 thousand** beds in tourism licensed accommodation establishments; 587 thousand of them are in hotels.
- **46%** of the hotel beds belong to 5 star hotels.





# D. Types of Tourism

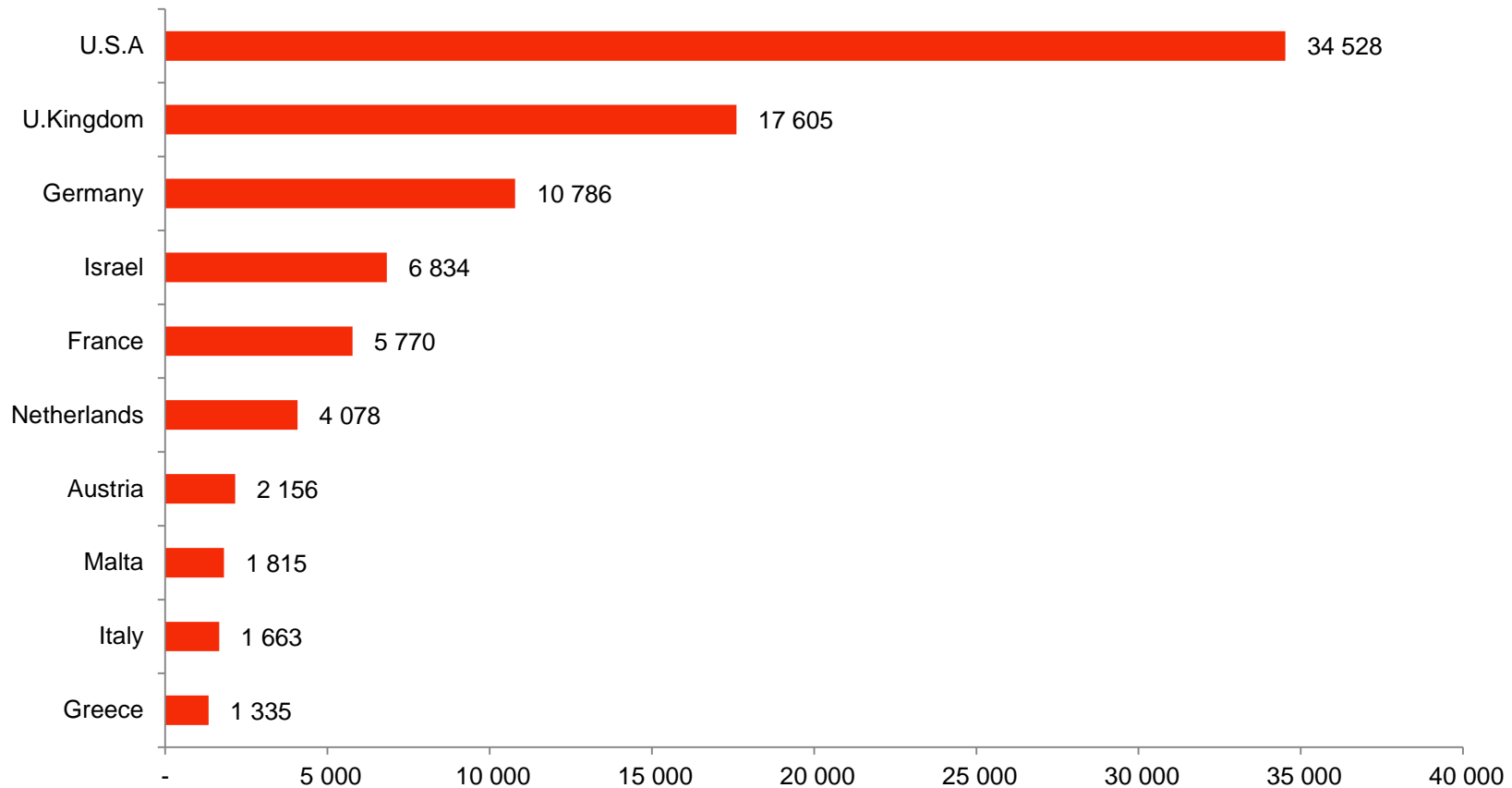
## ▶ Beach Tourism

- **382** blue flag beaches, ranks **2<sup>nd</sup>** in the world after Spain. (Source: The Foundation for Environmental Education, 2014)
- **10%** of the blue flag beaches in the world. (Source: The Foundation for Environmental Education, 2014)
- **954** yachting companies, with **1,704** yachts and **17,109** beds in 2012. (Source: Ministry of Culture and Tourism, 2013)
- **91,594** foreign yachts (Flag Q yachts + yachts which have renewed their transitlog+ yachts have arrived on their route) and **104,169** foreign yachtsmen and crew members arrived Turkish ports in 2012. (Source: Ministry of Culture and Tourism, 2013)
- **21** blue flag marinas. (Source: The Foundation for Environmental Education, 2014)



## ▶ Yacht Tourism

Distribution of Foreign Yachts Arrived in Turkish Ports by their Flags, 2012



Source: Ministry of Culture and Tourism, 2013



## ▶ Congress Tourism

- Turkey ranks **21<sup>st</sup>** in the world and **13<sup>th</sup>** in Europe in terms of the number of meetings, with **179** meetings in 2012. (Source: International Congress and Convention Association, 2012)
  
- Istanbul ranks **9<sup>th</sup>** in the world and **8<sup>th</sup>** in Europe in terms of the number of meetings, with **128** meetings in 2012. (Source: International Congress and Convention Association, 2012)



# D. Types of Tourism

## ▶ Winter Tourism

Center	Bed Capacity		Current Mechanical Facilities		
	Current	Target	Number	Capacity (person/hour)	Length (meters)
Erzurum Palandoken	2466	8850	16	24563	25788
Bursa Uludag	1600	4300	20	15000	18514
Bolu Koroglu	1580	4000	14	7000	10380
Kayseri Erciyes	920	6000	15	22750	25689
Kastamonu Cankiri Ilgaz	917	1300	2	1439	1593
Kocaeli Kartepe	800	1000	4	6400	3250
Kars Sarikamis	639	12000	3	4148	5573
Isparta Davraz	467	1600	4	3800	3577

Source: Ministry of Culture and Tourism, 2014

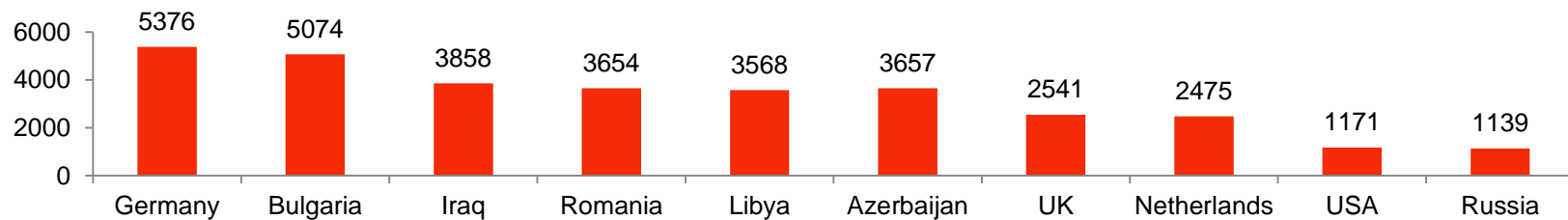


# D. Types of Tourism

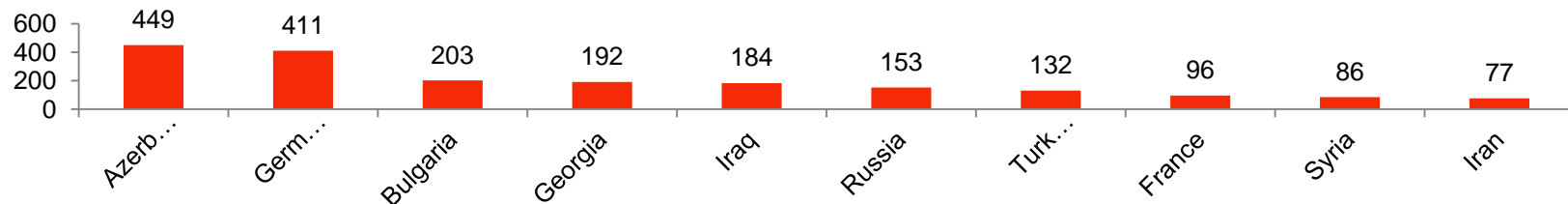
## ► Health & Thermal Tourism

- **1,500** thermal sources
- Turkey ranks **1<sup>st</sup>** in Europe **7<sup>th</sup>** in the world in terms of the potential of geothermal resources.
- **51** thermal hotels with **8,048** rooms and **17,216** beds in 2012.
- 2023 target: **USD 20 bn** revenues from health tourism, **2 mn** foreign patients

Health Tourists in Turkish Private Hospitals, Top 10 Nationalities, 2011



Health Tourists in Turkish Public Hospitals, Top 10 Nationalities, 2011





# E. Main Companies

## ▶ Top 10 hotel chains in Turkey

Hotel Name	Number of Hotels, 2012	Number of Rooms, 2012
Hilton Int Group	22	5,519
Crystal Group	11	5,144
Rixos	10	4,533
InterContinental Group	16	3,394
Paloma-Diana	10	3,225
Kaya Group	9	3,076
WOW	5	2,914
Club Voyage	7	2,785
Delphin Group	5	2,644
Limak Group	9	2,578

Source: Resort Magazine, 2012





# E. Main Companies

## ▶ Main Tourism Companies

Company Name	Net Sales (TRY mn, 2012)*
Alkan Grup	913.7
Setur Servis	789.9
Odeon Turizm	780.0
ETS Tur	486.5
Tantur Turizm	348.7
Vista Turizm	328.9
Trek Turizm	284.0

\*EUR 1 = TRY 2.31 in 2012  
Source: Capital Magazine, 2013



## ▶ Targets and Expectations

- **2023** targets of the government:
  - **63 mn** tourists
  - **USD 86 bn** external tourism revenues
  - **USD 1,350** revenues per tourist

Source: Ministry of Culture and Tourism, 2007

- **USD 24 bn** (incl. accomodation investments of **USD 13 bn**) of investment will be needed to reach 2023 targets.

Source: Turkish Tourism Investors Association, 2014

- Total contribution of travel and tourism to GDP is forecast to rise from **TRY 192.6 bn** in 2013 to **TRY 301.3 bn** (11.9% of GDP) in 2024.
- Total contribution of travel and tourism to employment is forecast to rise from **2.3 mn** jobs in 2013 up to **3.1 mn** jobs in 2024.
- Travel and tourism investment is forecast to rise from **TRY 37.3 bn** in 2013 to **TRY 63 bn** in 2024.

EUR 1 = TRY 2.528 in 2013

Source: World Travel & Tourism Council, 2014

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