

Turkey

Tourism in the economy

Turkey has experienced a significant growth and change in tourism accompanied by the economic and political restructuring since the turn of the century. In 2016, Turkey received 31.3 million international tourists, with international receipts (exports) amounting to USD 22.1 billion. However, despite this positive long-term trend (up 210% between 2002 and 2014), figures for 2016 represent a decrease from 2014 when the figures for international arrivals and receipts were 39.8 million and USD 37.4 billion, respectively.

Tourism governance and funding

The Ministry of Culture and Tourism is responsible for tourism in Turkey, with a number of directorates covering activities relating to marketing, investment, training and the conservation of heritage and assets. Turkey also has 81 Provincial Culture and Tourism Directorates. The Ministry of Culture and Tourism has 46 Culture and Promotion Offices in 41 different countries, which undertake promotional and marketing activities, and cultural and art events to promote Turkey as a tourism destination. Other key ministries include the Ministry of Environment and Urbanisation, the Ministry of Food, Agriculture and Livestock, the Ministry of Economy, the Ministry of Development, the Ministry of Forestry and Water Affairs, and the Ministry of Transport, Maritime and Communications. Local administrations and municipalities also have responsibilities for tourism.

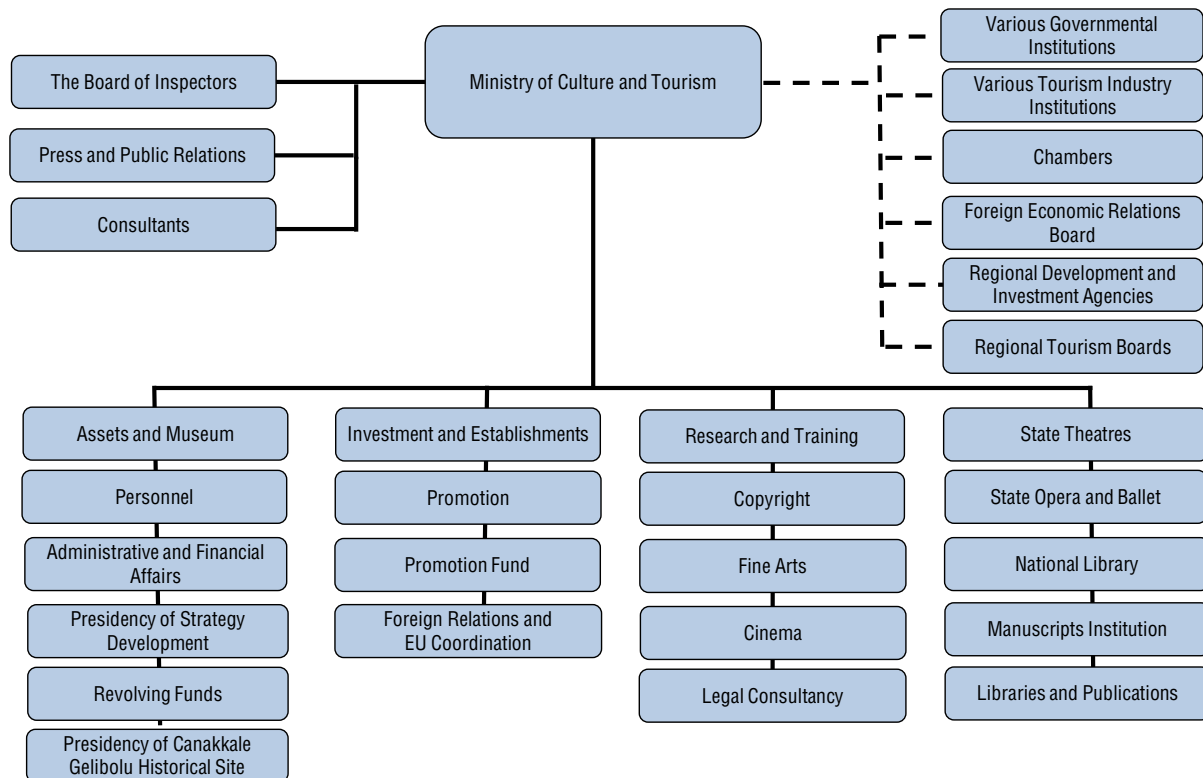
Several professional institutions and private sector associations work closely with the Ministry of Culture and Tourism on planning the future of tourism in Turkey and addressing specific issues. These include the Association of Turkish Travel Agencies, Touristic Hotels and Investors Association, Hoteliers Federation, Turkish Tourism Investors Association, the Tourist Guides' Association, and the Prime Minister's Investment Support and Development Agency. There are also many local associations throughout Turkey in the travel and tourism sector.

The overall public budget allocated to tourism sector in 2017 is TRY 493.6 million and the share of the Ministry of Culture and Tourism is TRY 138.3 million. The Ministry's budget includes TRY 20 million to support tourism investments, TRY 42.2 million for winter tourism infrastructure works, and TRY 40 million for thermal tourism infrastructure works. The Ministry also has an additional budget of TRY 28.7 million to support access to drinking water and sewerage systems in tourism intense areas.

- The Ministry of Culture and Tourism of Turkey organises a Tourism Council periodically with the participation of both central and local government representatives and private sector representatives,

- The Tourism Strategy of Turkey-2023 puts emphasis on Tourism Councils to ensure coordination across the tourism industry at national and regional levels. Tourism Councils should support efforts for further diversification and continuous quality improvement of tourism products.

Turkey: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Culture and Tourism, 2018.

Tourism policies and programmes

The most important challenge to fostering competitive, sustainable and inclusive tourism development in Turkey is to ensure that an accurate and positive impression of the country is conveyed to those who have not visited previously.

Other policy issues and challenges facing tourism in Turkey are:

- Addressing seasonality of demand. As a sun and sea destination, tourism flows and occupancy levels are quite peaked, limiting profitability and the contribution of tourism to the economy,
- Increasing employment, and tourism as a source for development, in the different regions of Turkey,
- Improving the sustainability of tourism products, including addressing issues of climate change and use of resources,
- Responding to global political and economic crises and their effect on tourism,
- Improving quality and skills in tourism.

A number of actions are being pursued to address these challenges, including:

- Diversifying the offer and developing more niche and special interest tourism products,
- Implementing a market-oriented approach which takes account of consumer expectations,
- Focusing on digital promotion and marketing,
- Increasing demand from traditional and emerging growth markets,
- The development of 33 National Standards and 24 Qualifications for vocational training.

The 2015-19 Strategic Plan of the Ministry of Culture and Tourism sets out Turkey's tourism objectives and goals regarding marketing and promotion, which include:

- Enhancing Turkey's competitiveness, market share and brand value in tourism on an international scale,
- Spreading and developing tourism activities all year round and across all the regions of the country by diversifying alternative tourism types, particularly health tourism, and enhancing the quality of tourism sector.

The Tourism Strategy of Turkey-2023 supports diversification by improving the infrastructure required for specialist tourism sectors and activities, aiming to increase tourism revenues in order to generate employment and increased incomes for all segments of society with a balanced use and conservation of strategic natural, cultural, historical and geographical assets. The 10th Development Plan, for 2014-18, supports activities to enhance health tourism, winter tourism, golf tourism, cultural tourism, cruise tourism, and convention tourism.

The focus of Turkey's destination marketing strategy is on the country's product diversity and on motivations to travel other than sea-sun-sand tourism, seeking to spread visits throughout the year and to the regions in a balanced way.

The Ministry also focuses on growing domestic tourism, promoting cultural and touristic values to Turkish citizens by giving support to appropriate fairs and events, and aiming to make holidays available to all segments of the community through pricing strategies such as low prices during the off season. The Ministry also works in co-operation with the Association of Turkish Travel Agencies (TURSAB), through an "early reservation campaign" offering low prices for domestic visitors making reservations four to seven months in advance.

One of the 25 Priority Transformation Programs designed to achieve the 2023 targets and objectives as part of the Tenth Development Plan, is the Health Tourism Improvement Program. The program, which is a collaboration between the Ministry of Health and the Ministry of Culture and Tourism, enhances competitiveness by raising the quality of services in the field of thermal tourism. The target is to establish capacity of 100 000 beds supplying thermal tourism services to 1.5 million foreign tourists, and a revenue target of USD 3 billion. The Ministry provides investment and planning support to selected thermal tourism centres, establishing new models for development including the integration of a thermal hotel with a care centre and park.

Since 2007, the UN Development Programme and the Ministry of Culture and Tourism have worked in partnership for local economic development. Together with Anadolu Efes, a leading entrepreneurial Turkish group, the partnership is implementing the "Future is in Tourism" project. To date, 13 destinations have been selected for this capacity building project which is designed to provide local tourism actors and NGOs with the necessary guidance, tools and resources to contribute to sustainable tourism development through partnerships with public and private institutions.

The Ministry's tourism agenda is mainly focused on competitiveness, sustainable tourism planning, keeping up with recent global tourism trends, destination based planning and marketing. Travel is constantly changing to new trends such as adventure trips, solo travel, and responsible tourism. Technology plays an important role in researching and organising the pre, during and post stages of a journey. In addition, the Ministry of Culture and Tourism attaches great importance to social and digital media as a means to promote Turkey, and also to the use of video and film.

Use of video and film media in the promotion of Turkey

Since 2014, a global advertisement and image campaign “Turkey: Home” has been sharing the life style, historical, cultural and natural values of the country through use of digital tools and multiple social media channels. 21 promotional films have been produced, including *Turkish Coffee*, *Grand Bazaar*, *Two Continents*, *Baklava*, *Troy*, *Poetry*, and *Evil Eye Bead* as well as the more usual destination specific films. The Global Image Campaign now has almost 7 million followers.

A themed advertisement film “Turquois” has been shown outdoors on digital screens and billboards, TV channels, and cinemas in target countries. An introductory film, taken to various festivals in co-operation with the International Committee of Tourism Film Festivals (CIFFT) was chosen as the best film of 2016 (www.hometurkey.com).

Statistical profile

Table 1. Turkey: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	106 226	112 161	115 088	115 381	106 501
Overnight visitors (tourists)	64 922	68 452	70 894	71 251	68 450
Same-day visitors (excursionists)	41 304	43 709	44 194	44 130	38 051
Nights in all types of accommodation	556 803	557 459	575 871	588 786	605 608
Hotels and similar establishments	..	..	..	..	..
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	37 715	39 861	41 627	41 114	30 907
Overnight visitors (tourists)	35 698	37 795	39 811	39 478	30 289
Same-day visitors (excursionists)	2 017	2 066	1 816	1 640	618
Top markets					
Germany	5 029	5 041	5 250	5 581	3 890
Georgia	1 405	1 769	1 755	1 912	2 206
United Kingdom	2 457	2 509	2 600	2 512	1 711
Bulgaria	1 492	1 583	1 694	1 821	1 691
Netherlands	1 274	1 312	1 304	1 232	906
Nights in all types of accommodation	90 822	89 594	97 581	96 400	65 793
Hotels and similar establishments	90 762	89 543	97 315	96 345	65 657
Specialised establishments	..	..	..	..	..
Other collective establishments	60	51	266	55	136
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	5 803	7 526	7 982	8 751	7 892
Overnight visitors (tourists)
Same-day visitors (excursionists)
Top destinations					
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TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	31 566	36 192	38 766	35 451	26 695
International travel receipts	25 345	27 997	29 552	26 616	18 743
International passenger transport receipts	6 221	8 195	9 214	8 835	7 952
Outbound tourism					
Total international expenditure	4 585	5 253	5 475	5 686	5 036
International travel expenditure	4 094	4 817	5 072	5 368	4 783
International passenger transport expenditure	491	436	403	318	253

.. Not available

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933641412>


Table 2. **Turkey: Enterprises and employment in tourism**

	Number of establishments ¹	Number of persons employed				
	2015	2012	2013	2014	2015	2016
Total	..	..	..	..	..	..
Tourism industries	400 718	1 173 512	1 230 069	1 286 450	1 329 551	..
Accommodation services for visitors	15 345	237 428	246 807	263 847	284 400	..
Hotels and similar establishments	11 669	230 401	240 633	257 519	276 050	..
Food and beverage serving industry	201 273	532 320	551 110	575 349	607 190	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	133	23 054	25 322	27 844	31 473	..
Railways passenger transport	.. c	.. c	.. c	.. c	.. c	..
Road passenger transport	149 688	281 908	292 777	292 609	267 513	..
Water passenger transport	2 857	8 498	9 413	9 744	10 662	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	6 585	11 785	14 178	20 385	25 478	..
Travel agencies and other reservation services industry	7 220	39 504	45 897	44 506	49 075	..
Cultural industry	4 750	8 769	11 969	12 593	13 400	..
Sports and recreation industry	12 867	30 246	32 596	39 573	40 360	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available; c Confidential data

1. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933641431>



From:
OECD Tourism Trends and Policies 2018

Access the complete publication at:
<https://doi.org/10.1787/tour-2018-en>

Please cite this chapter as:

OECD (2018), "Turkey", in *OECD Tourism Trends and Policies 2018*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2018-40-en>

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