

Türkiye

Tourism in the economy and outlook for recovery

Tourism is an important contributor to the economy of Türkiye. In 2019, tourism receipts reached USD 41.3 billion, representing 5.4% of GDP. Tourism-related employment accounted for 8.1% of the workforce, or 2.3 million people. The share of tourism employment in total employment declined to 6.6% in 2021. Tourism receipts fell 67% in 2020 to USD 13.6 billion, with tourism's contribution to national GDP falling to 1.9%. In 2021, Tourism receipts increased by 110% compared to the previous year and reached USD 28.6 billion, with a contribution to national GDP of 3.5%.

The number of international arrivals to Türkiye reached a record high of 51.2 million in 2019. In 2020, 15.9 million tourists visited Türkiye, a decrease of 69% compared to the previous year. The number of international visitors to Türkiye rebounded to 30 million in 2021, up 88% from 2020. The relative strength of international tourism saw Türkiye enter the top five global destinations in 2021. The top source markets included Russia (15.6% of total inbound tourism), Germany (10.3%), Ukraine (6.8%) and Bulgaria (4.7%).

Signs of recovery were also seen in domestic tourism, which recorded 52.8 million tourists, a ten million increase from 2020, however remaining 32.5% below pre-pandemic levels.

2022 is expected to see continued growth, with an expected 42 million international arrivals, although remaining below pre-pandemic levels. Türkiye expects to hit 60 million international arrivals in 2023 and 70 million in 2024.

Tourism governance and funding

The Ministry of Culture and Tourism is responsible for tourism in Türkiye. Its duties are to investigate, develop, protect, maintain, evaluate, disseminate and promote tourism in order to contribute to the strengthening of national unity and economic growth.

Overseas marketing and promotion are directed and co-ordinated by the Promotion Directorate within the Ministry of Culture and Tourism and delivered by a network of 46 overseas offices in 41 different countries. At the regional level, Türkiye has 81 Provincial Culture and Tourism offices that conserve the historical, cultural and natural heritage, diversify tourism, and promote the region through cultural events, festivals and fairs.

Several professional institutions and private sector associations work closely with the Ministry to plan tourism and address specific issues. These bodies include the Association of Turkish Travel Agencies, Touristic Hotels and Investors Association, Hoteliers Federation, Turkish Tourism Investors Association and the Union of Tourist Guides' Chambers. The investment Office of the Presidency of the Republic of Türkiye also promotes Türkiye's investment opportunities to the global business community and assists investors.

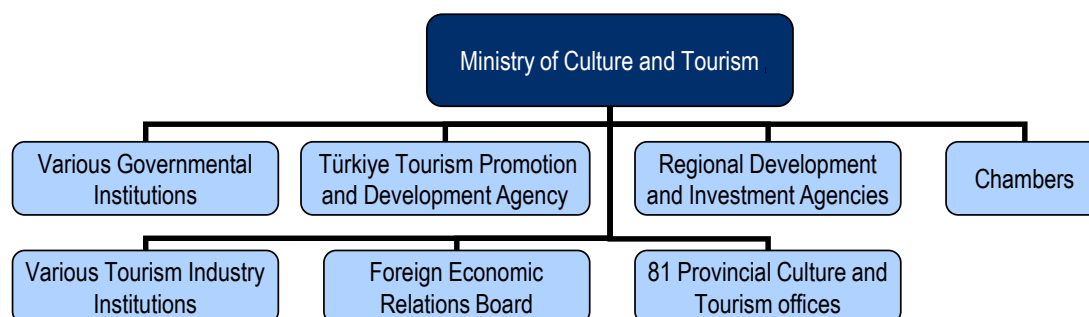
Founded in 2019, the Türkiye Tourism Promotion and Development Agency is dedicated to promoting Türkiye as a brand and a popular destination in both domestic and international tourism markets;

discovering, developing and promoting tangible and intangible natural, cultural and heritage assets; boosting the tourism capacity of Türkiye, increasing the rate of tourism investments in the national economy and raising the quality of service with short, medium and long-term communication and marketing activities.

Operating under the auspices of the Ministry of Culture and Tourism, the Agency is subject to private law provisions. The Agency comprises the Board of Directors, Executive Board, and Advisory Board, with the Board of Directors serving as the decision-making body. The Board of Directors comprises 15 members chaired by the Minister of Culture and Tourism of the Republic of Türkiye.

Türkiye also plans to develop domestic and international tourism in new destinations, using a destination management model to redesign the management structure in the provinces.

Türkiye: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Culture and Tourism, 2022.

Tourism policies and programmes

To prepare Türkiye's tourism industry for future shocks, the Ministry is updating the Tourism Masterplan and setting new goals for 2022-24.

Sustainable tourism is a key priority for Türkiye's post-COVID-19 strategy and a main pillar in the updated Masterplan. In order to redesign Türkiye's sustainable tourism policies and efforts, the Ministry of Culture and Tourism co-operates with local, national, and international stakeholders and academia. Türkiye also updated its Tourism Master Plan 2023 to reflect the impacts and challenges of the pandemic on tourism. In accordance, a crisis management strategy outline was added to the Plan.

Türkiye's tourism industry has been growing steadily over the last 40 years, with new investments in infrastructure such as large hotels, holiday villages, luxury boutique hotels, ports, airports, high-speed trains, roads, highways, and metros in almost all big cities. The rate of tourism-related investment has decreased with the impact of the COVID-19 pandemic.

Türkiye introduced a set of policies and practices to keep tourism businesses running during the restrictions associated with the COVID-19 pandemic, including:

- Providing bank loans for advance payments covering preliminary reservations.
- Delaying social security payments by six months.
- Allowing Ministry-approved travel agencies to work online.
- Postponing debt payments from tourism facilities located on public land.
- Providing fast bank loans with repayment holidays to small-scale tourism operations.
- Postponing accommodation tax in hotels and tourism facilities and hotel rents.
- Paying TRY 1 000 to 3 million households financially affected by the crisis.

The slowdown of travel during the pandemic provided time for tourism policymakers to develop new policies and innovative practices. During this period, the Ministry took the opportunity to redesign its five-year tourism policies, prioritising sustainability and competitiveness.

New programmes include the Safe Tourism Certification to assess COVID-19 measures in tourism businesses across the industry (see box below) and Go Türkiye, a new multi-platform tourism portal. Go Türkiye was completed in 2020 and aims to help spread tourism throughout the country. The portal actively involves tourism NGOs, universities, the private sector, and provincial tourism administrations. A survey conducted in all 81 provinces of Türkiye provided data, opinions, and feedback which will be used for developing new destinations and redesigning tourism in the post-COVID-19 era.

To increase the competitiveness of Türkiye's tourism industry, the Ministry enhanced co-operation with international stakeholders such as the UNWTO, Global Sustainable Tourism Council and the World Economic Forum. The Ministry also continues to work closely with national stakeholders such as industry partners, the business association TÜSİAD, and other ministries involved in tourism and sustainability.

Safe Tourism Programme in Türkiye

As an early response to the increasing need for extra hygiene and sanitation, Türkiye introduced the Safe Tourism Certification Programme. The programme, led by the Culture and Tourism Ministry, was developed with contributions from the Ministries of Health, Internal Affairs and Foreign Affairs, and in co-operation with all the stakeholders in the industry

Facilities which have received verification are publicised on the Ministry of Culture and Tourism's website, and the Safe Tourism Certification logo is placed on visible areas of the verified facility. QR codes on all logos allow guests and customers to access the facility's inspection data, making the process transparent. The certification is designed for the tourism sector, including accommodation facilities, food and beverage facilities, tour and transfer vehicles, culture, art and congress facilities, theme parks and ski lifts.

The programme criteria have been updated several times since 2020 due to the changing needs and new regulations. The Safe Tourism Program sets a series of measures with over 600 parameters and is obligatory for many businesses (for example, accommodation establishments with 30 or more rooms) and is recommended for smaller businesses.

Since the programme started, more than 12 000 facilities have been certified.

Statistical Profile

Türkiye: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	120 872	126 446	124 639	67 142	75 883
Overnight visitors (tourists)	77 179	78 523	78 202	42 847	52 774
Same-day visitors (excursionists)	43 693	47 923	46 437	24 295	23 109
Nights in all types of accommodation	665 194	633 721	637 070	469 091	458 872
Hotels and similar establishments	49 786	55 815	51 633	23 569	41 654
Other collective establishments	19 030	19 116	19 087	9 926	16 480
Private accommodation	596 378	558 790	566 350	435 596	400 738
Inbound tourism¹					
Total international arrivals	37 970	46 113	51 747	15 971	30 039
Overnight visitors (tourists)	37 601	45 768	51 192	15 894	29 925
Same-day visitors (excursionists)	369	345	555	77	114
Top markets					
Russia	4 702	5 954	6 996	2 117	4 684
Germany	3 518	4 464	4 993	1 119	3 083
Ukraine	1 266	1 372	1 515	979	2 049
Bulgaria	1 850	2 383	2 710	1 242	1 402
Netherlands	2 434	2 066	1 989	271	645
Nights in all types of accommodation	80 063	112 245	132 808	40 093	93 124
Hotels and similar establishments	79 960	112 226	132 776	40 083	93 093
Other collective establishments	103	19	32	10	31
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	8 887	8 383	9 651	2 243	2 738
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Iraq	581	1 014	1 046	..	453
Europe not specified	1 105	1 229	1 448	..	403
Bulgaria	949	987	1 253	..	403
Georgia	1 016	778	1 015	..	275
Greece	1 058	884	918	..	87
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	29 116	37 175	41 284	13 595	28 611
International travel receipts	20 691	25 243	29 813	10 221	20 909
International passenger transport receipts	8 425	11 932	11 471	3 374	7 701
Outbound tourism					
Total international expenditure	4 620	5 003	5 259	1 410	2 093
International travel expenditure	4 302	4 601	4 108	1 040	1 657
International passenger transport expenditure	318	402	1 151	370	437

.. Not available

1. Arrivals from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/pdkbye>


Türkiye: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2020	2017	2018	2019	2020	2021
Total	..	..	..	..	..	..
Tourism industries	501 608	2 062 809	2 222 378	2 284 072	1 851 788	1 897 069
Accommodation services for visitors	23 024	294 958	343 928	368 941	297 322	313 745
Hotels and similar establishments	19 091	247 100	286 101	303 333	230 471	246 583
Food and beverage serving industry	271 214	1 189 288	1 253 134	1 305 850	1 045 965	1 059 197
Passenger transport	162 567	391 243	411 351	399 845	344 636	350 232
Air passenger transport	186	..	..	..	..	..
Railways passenger transport	.. c	..	..	..	..	..
Road passenger transport	159 178	..	..	..	..	..
Water passenger transport	3 203	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	10 424	24 250	27 593	28 855	27 606	24 204
Travel agencies and other reservation services industry	11 195	44 157	50 103	50 929	40 964	56 481
Cultural industry	5 455	56 491	55 111	54 065	41 076	35 686
Sports and recreation industry	17 729	62 422	81 158	75 587	54 220	57 525
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  <https://stat.link/j6n8oh>



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