

Turkey

Tourism in the economy

Tourism is one of Turkey's most dynamic and fastest growing economic sectors. In 2018, it directly accounted for 7.7% of total employment, directly employing 2.2 million people. Total tourism income represented 3.8% of GDP. Travel exports accounted for 51.9% of total service exports in 2018.

Turkey attracted 45.8 million international tourists in 2018, an increase of 21.7% compared with 2017 which generated TRY 142.4 billion in tourism revenues, a 12% increase compared to the previous year. According to 2018 border statistics, top inbound markets included Russia, accounting for 13.0% of total international arrivals and Germany with 9.8%. Other top markets include Bulgaria (5.2%), United Kingdom (4.9%) and Georgia (4.5%).

Domestic tourism is growing in Turkey with a total of 126.4 million trips recorded in 2018. This is an increase of 4.6% when compared to 2017. Of these trips, 78.5 million were overnight visitors (62.1%) and 47.9 million were same-day visitors (37.9%).

Tourism governance and funding

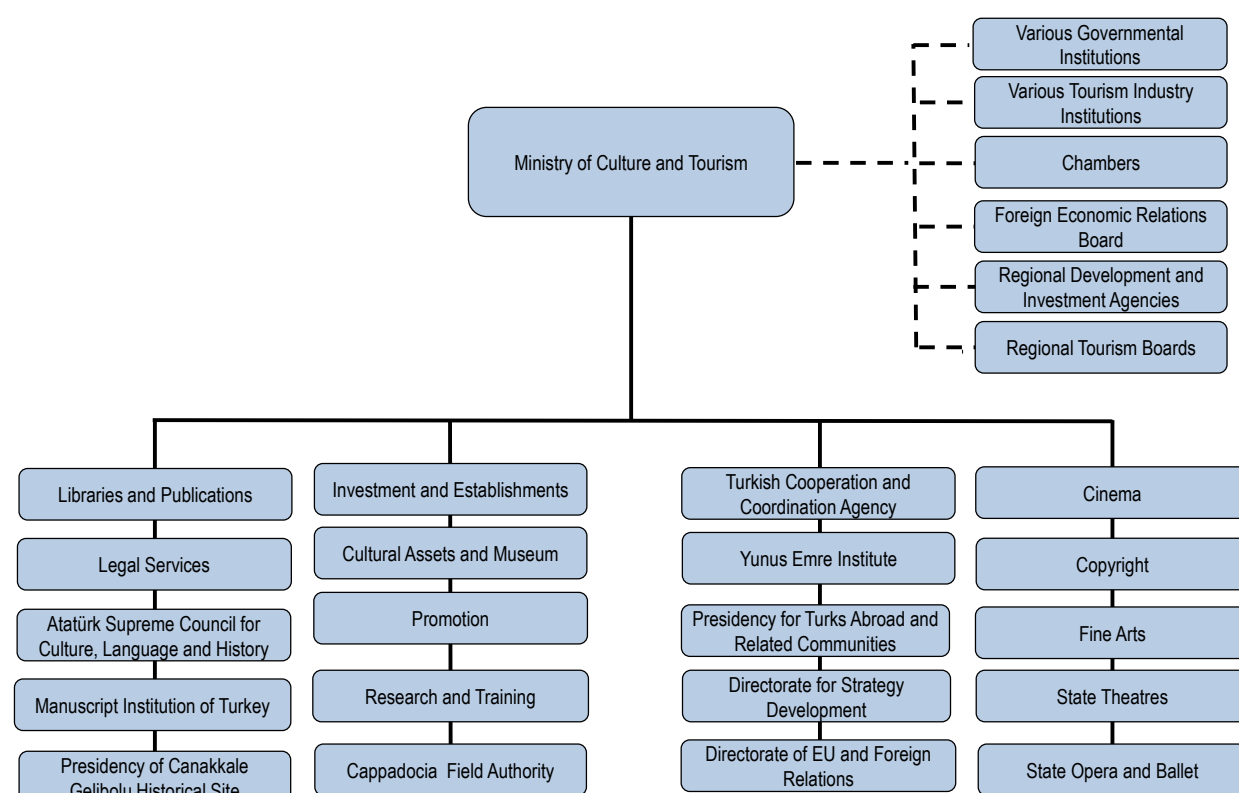
The Ministry of Culture and Tourism is responsible for tourism in Turkey. Its duties are to investigate, develop, protect, maintain, evaluate, disseminate and promote tourism in order to contribute to the strengthening of national unity and economic growth.

Overseas marketing and promotion is 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 regional level Turkey 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 in the regions.

Several professional institutions and private sector associations work closely with the Ministry, both to plan tourism and to 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 Turkey also promotes Turkey's investment opportunities to the global business community and provides assistance to investors.

In August 2019, the Turkey Tourism, Promotion and Development Agency was established to promote the development of tourism capacity. The Agency has an executive board, with member representatives from both public and private sectors.

Turkey: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Culture and Tourism, 2020.

Tourism policies and programmes

The principal national policy documents relating to tourism are the Five-Year National Development Plans and the three-year rolling medium-term programmes known as the New Economy Programme. The current 11th development plan from 2019-2023, is considered to be the roadmap to increase the economic welfare of Turkey over the long-term. Tourism is defined in the Plan as one of the primary sectors to be encouraged. As outlined in the New Economy Programme for the 2019-2021 period, Turkey has begun preparing a *Tourism Master Plan* to deliver the policy priorities. The Ministry of Culture and Tourism, taking account of the tourism perspectives in the above mentioned documents, prepares a Strategic Plan to 2023, which demonstrates the sectoral priorities and activities covering a four year period.

Diversification and innovation of tourism activities in accordance with changing consumer trends and technology, extending the tourism season, increasing the service quality, attracting high spending visitors and increasing length of stay are the essential aims of the Development Plan. Annual Programmes that define the short term priorities and the road map are also published and co-ordinated by the Strategy Budget Office of the Turkish Presidency.

The main issues and challenges facing tourism in Turkey include:

- Addressing seasonality - As a predominantly sun and sea destination, tourism flows and occupancy levels are highly concentrated in the summer season, limiting profitability and the contribution that tourism makes to the economy,
- Enabling the use of tourism as a tool for regional development - while there is great scope for increasing tourism it is currently concentrated in key coastal and city destinations,

- Improving environmental performance - of the tourism industry and by developing new products, ensuring that it is planned and developed sustainably and uses resources wisely,
- Improving the quality of service skills in tourism - with particular regard to education and training of the workforce, and,
- Responding to global unrest and economic crises in nearby countries.

The Government's aim is to ensure a competitive, sustainable and inclusive tourism industry. Current policy objectives include diversifying away from the mass tourism 'sun and sea' product by developing high quality niche tourism experiences that match consumer expectations. These niches include cultural tourism, sports tourism, MICE/business tourism and the health/wellness sector. Extending the season to benefit from a year-round product and spreading the benefits of tourism regionally are other important objectives. The Government is also committed to ensuring that tourism products and services are fully accessible for all visitors.

Developing Turkey's image and brand on the world stage, and as a result increasing Turkey's market share, is considered fundamental. Market research reflects the changing needs and demands of today's visitors and current marketing activity is focussed on both volume and emerging markets with a priority to increase the share of high income tourists and gain additional spend per tourist by increasing the length of stay. India, Republic of China, South Korea and Japan are being prioritised in order to increase tourist traffic and revenue.

Promotions cover a wide range of activity and channels including social and digital platforms, international tourism fairs, hosting influencers, special events, familiarisation trips for trade and media and extensive PR activity. This emphasises the breadth and range of product away from 'sun and sea' to include winter experiences, youth, golf, sailing, health and city tourism. Recently implemented marketing activity drew on the Country's unique values by emphasising the rich cultural and artistic heritage that has existed in Turkey for millennia. The Ministry of Culture and Tourism has focussed on both supply and demand – by prioritising the conservation of heritage assets and by increasing market share through enhancing the image and perception of the country and working to strengthen its brand values worldwide. This dual focus has been underpinned over the last two years by adopting a theme for each year with 2018 being declared as *Year of Troy* and 2019 as *Year of Göbeklitepe*. By promoting such cultural, artistic and touristic values and creating awareness about these values, the series of *Years* aims to enhance the image and perception of the country and strengthen its international brand.

Another future orientated programme has been the development of new social media and digital strategies to grow new markets. The Ministry of Culture and Tourism has introduced the Go Turkey platform, with 6.5 million followers, which draws on the country's natural, historical and cultural values. The platform contains destination and product information that focuses on different experiences in lesser-known destinations, and on other seasons and activities including winter season, health, convention, yacht, youth, city and cultural tourism. Extensive social media activity covers posts on Facebook, Twitter, Instagram, Pinterest, YouTube, LinkedIn, Snapchat and TripAdvisor.

Statistical Profile

Turkey: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	115 088	115 381	106 501	120 872	126 446
Overnight visitors (tourists)	70 894	71 251	68 450	77 179	78 523
Same-day visitors (excursionists)	44 194	44 130	38 051	43 693	47 923
Nights in all types of accommodation	575 871	588 786	605 608	665 194	633 721
Hotels and similar establishments	41 322	39 621	48 623	49 786	55 815
Other collective establishments	23 209	17 294	17 700	19 030	19 116
Private accommodation	511 340	531 871	539 285	596 378	558 790
Inbound tourism¹					
Total international arrivals	41 627	41 114	30 907	37 970	46 113
Overnight visitors (tourists)	39 811	39 478	30 289	37 601	45 768
Same-day visitors (excursionists)	1 816	1 636	618	369	345
Top markets					
Russian Federation	4 460	3 633	857	4 702	5 954
Germany	5 026	5 356	3 827	3 518	4 464
Bulgaria	1 688	1 817	1 688	1 850	2 383
United Kingdom	2 352	2 266	1 588	1 604	2 220
Georgia	1 751	1 907	2 204	2 434	2 066
Nights in all types of accommodation	118 939	109 256	77 460	80 063	112 245
Hotels and similar establishments	118 546	109 014	77 177	79 960	112 118
Other collective establishments	393	242	283	103	127
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	7 982	8 751	7 892	8 887	8 383
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Europe not specified	649	767	922	1 105	1 229
Iraq	1 214	1 401	57	581	1 014
Bulgaria	731	782	939	949	987
Greece	912	1 018	883	1 058	884
Georgia	1 256	1 164	1 187	1 016	778
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	38 855	35 597	26 788	31 868	37 140
International travel receipts	29 552	26 616	18 743	22 478	25 220
International passenger transport receipts	9 303	8 981	8 045	9 391	11 920
Outbound tourism					
Total international expenditure	5 475	5 683	5 025	5 181	4 999
International travel expenditure	5 072	5 368	4 783	4 823	4 595
International passenger transport expenditure	403	315	242	358	404

.. Not available

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

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078053>

Turkey: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed				
	2017	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	492 960	1 801 084	1 926 751	1 969 776	2 062 808	2 222 378
Accommodation services for visitors	21 116	260 777	300 182	267 589	294 958	343 928
Hotels and similar establishments	16 350	219 881	250 289	214 928	247 100	286 101
Food and beverage serving industry	267 094	1 071 945	1 128 515	1 164 473	1 189 288	1 253 134
Passenger transport	164 475	311 570	324 820	362 572	391 243	411 351
Air passenger transport	157	..	..	..	..	..
Railways passenger transport	.. c	..	..	..	..	..
Road passenger transport	161 359	..	..	..	..	..
Water passenger transport	2 959	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	8 809	15 506	13 311	15 727	24 250	27 593
Travel agencies and other reservation services industry	9 240	46 647	49 734	51 324	44 157	50 103
Cultural industry	5 476	32 400	38 565	50 000	56 491	55 111
Sports and recreation industry	16 750	62 240	71 624	58 092	62 422	81 158
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/10.1787/888934078072>



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