MINISTRY OF CULTURE AND TOURISM
THE FUTURE OF MEDITERRANEAN TOURISM

ROBUST AND ADAPTED:

PUBLIC INSTITUTIONS AND LOCAL INITIATIVE AS KEYSTONE FOR THE COMPETITIVENESS OF DESTINATIONS
AGENDA

- Tourism in Numbers
- Success Story
- Branding Turkey
- What Has Been Done
- Turkey Offers
TOURISM IN NUMBERS
TOURISM IN NUMBERS

2011

World : 980 million → % 4.4 growth

2012 - Forecasts

World → 1 billion → %3-4 growth

Source: UNWTO
<table>
<thead>
<tr>
<th>Year</th>
<th>France</th>
<th>Spain</th>
<th>Italy</th>
<th>Turkey</th>
<th>World</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>77.2</td>
<td>46.4</td>
<td>41.2</td>
<td>9.6</td>
<td>674</td>
</tr>
<tr>
<td>Share in World Tourism</td>
<td>11.45</td>
<td>6.88</td>
<td>6.11</td>
<td>1.42</td>
<td>100.00</td>
</tr>
<tr>
<td>2005</td>
<td>75</td>
<td>55.9</td>
<td>36.5</td>
<td>20.3</td>
<td>797</td>
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<tr>
<td>Share in World Tourism</td>
<td>9.41</td>
<td>7.01</td>
<td>4.58</td>
<td>2.55</td>
<td>100.00</td>
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<tr>
<td>2010</td>
<td>77.1</td>
<td>52.7</td>
<td>43.6</td>
<td>27</td>
<td>939</td>
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<tr>
<td>Share in World Tourism</td>
<td>8.21</td>
<td>5.61</td>
<td>4.64</td>
<td>2.88</td>
<td>100.00</td>
</tr>
</tbody>
</table>

Resource: UNWTO World Tourism Barometer, Volume 10, January 2012
TOURISM IN NUMBERS

2000

Turkey : 9.6 million → 20th Place

2011

Turkey : 29.3 million → 6th Place

29.3 mil. (No. of Tourists) = 31.5 mil. (Total No. of Foreign Visitors) - 2.2 mil. (No. of Excursionists)

Source: UNWTO
TOURISM IN NUMBERS

In the 100\textsuperscript{th} ANNIVERSARY of REPUBLIC of TURKEY

2023

50 million tourist arrivals,

50 billion $ tourism receipts.
TOURISM IN NUMBERS

New and high quality accommodation facilities

<table>
<thead>
<tr>
<th>Year</th>
<th>Hotels</th>
<th>Beds</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980</td>
<td>778</td>
<td>82,332</td>
</tr>
<tr>
<td>1990</td>
<td>3.181</td>
<td>496,742</td>
</tr>
<tr>
<td>2000</td>
<td>3.124</td>
<td>568,962</td>
</tr>
<tr>
<td>2011</td>
<td>3.693</td>
<td>945,048</td>
</tr>
</tbody>
</table>
SUCCESS STORY
SUCCESS STORY

There are 3 development periods of Turkish tourism sector:

1. 1<sup>st</sup> Period (1963 – 1982)
2. 2<sup>nd</sup> Period (1982 – 2003)
3. 3<sup>rd</sup> Period (2003 – going on)
SUCCESS STORY

1st Period (1963 – 1982)

- planning and implementations by the STATE
- pioneering projects for tourism development
- protection of natural and cultural values

LAW no. 2634 - TOURISM ENCOURAGEMENT LAW (1982)

- Authorization in tourism oriented land use planning
- Determination of priority zones for tourism development (Tourism Centres)
- Allocation of state owned lands to private investors
- Creation of an efficient tourism sector with increased tourism establishments and bed capacity
- Standardization and licensing of the establishments
- Strengthening the central role of Ministry of Culture & Tourism
SUCCESS STORY


OTHER SUPPORTIVE MEASURES

- Encouragement of the private sector
- Centralized planning, public land allocation through the Ministry of Tourism
- Incentives for infrastructure, water, electricity consumption etc.
- Investment credits through Tourism Development Bank of Turkey
- Diversification, standardization and monitoring of the tourism establishments
- Education and maintaining qualified tourism staff
SUCCESS STORY

3rd Period (2003 – going on)

AMENDMENTS IN TOURISM ENCOURAGEMENT LAW (2003)

- Increase promotion expenses
- Diversification of tourism products (golf/ MICE/ health tourism etc.)
- Upgrading tourism service quality
- Increase bed capacity in favour of alternative-diversified tourism activities
- Maximize private sector’s role, minimize state’s intervention ("Land Development Model")
- Large Scale planning & public land allocation creation of Satellite Tourism Zones – Cities (housing, marinas, golf courses, hotel complexes)
SUCCESS STORY

TOURIST ARRIVALS

- 1980: 1.2 million
- 1990: 5.3 million
- 2000: 10.4 million
- 2011: 29.3 million

Increased 22 times
SUCCESS STORY

TOURISM RECEIPTS

- 1980: 0.4 billion $
- 1990: 3.2 billion $
- 2000: 7.6 billion $
- 2011: 23 billion $

Increased 62 times
INCENTIVES AND SUBSIDIES
Incentives and Subsidiaries in Government Support on Establishments within the Scope of the Decree of the Council of Ministers,

Exemptions in the Real Estate Tax Law No. 1319,

Credit Facilities Supplied by Export Credit Bank of Turkey (EXIMBANK),

Foreign Investment Incentives,

Subsidies in Participation in Tourism Fairs Abroad.
INCENTIVES WITHIN THE SCOPE OF TOURISM ENCOURAGEMENT
LAW NO 2634

- VAT Exemption
- Customs Duty Exemption
- Tax Reduction
- Social Security Premium Support (Employer's Portion)
- Land Allocation
- Interest Support

* Incentives Are Valid for 3 Star, 4 Star, 5 Star and Boutique Hotels That Are Licensed by the Ministry of Culture and Tourism.
BRANDING TURKEY
BRANDING TURKEY

Community Tourism

Ecotourism

Rural Tourism

Culture Tourism

Thermal Tourism
Almost 75% of travellers claim it is important that their visit unharms the environment and the local heritage.

38% of American travellers are willing to pay 5% to 10% more for tourism products and services from environment-minded companies.

58% of travellers are influenced by a ‘green’ rating system when selecting a hotel.

More than 33% of business travellers seek out environment-friendly hotels.

50% would book a more sustainable holiday if it were ready and available.
WHAT HAS BEEN DONE
WHAT HAS BEEN DONE

COLLABORATION BETWEEN PUBLIC-PRIVATE-LOCAL

- ENRICH PRODUCTS
- DEVELOP REGION
- REDUCE RISKS
- ENHANCE BUSINESS
- PROTECT COMMON INTERESTS
WHAT HAS BEEN DONE

DOCUMENTS

- National Development Plan,
- Tourism Strategy of Turkey,
WHAT HAS BEEN DONE

BLUE FLAGS

Environmentally and Friendly

- 314 beaches
- 14 marinas

GREEN STARS

- 22 Hotels
- 5 Hotels are in a waiting list
“by promoting individual tourism in addition to mass tourism, we can support small businesses, increase the employment, and ensure better income distribution. We can develop tourism through smaller investments. We can make the society reconcile with tourism. We can make our people meet with the world.”
THANK YOU

“If you have enough reasons, you can do anything”
ONUR GÖZET
HEAD OF FOREIGN RELATIONS AND EU COORDINATION DEPARTMENT

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