

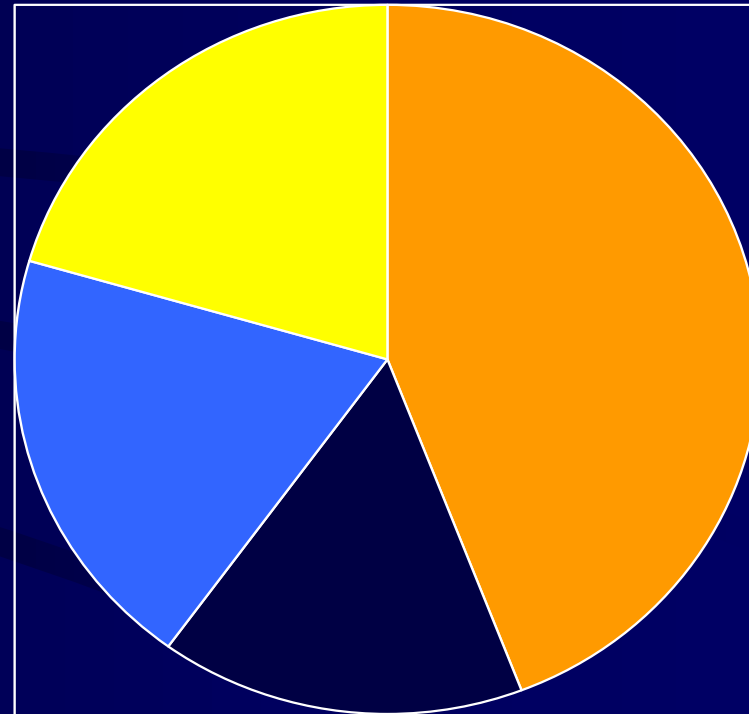
Investments in Marketing Strategies of Turkey

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Major Tourist Generating Countries

- Germany
- Russia
- UK
- Others



■ Germany □ Russia ■ UK ■ Others

Capacity of Establishments

TYPE AND CLASS OF ESTABLISHMENTS	NUMBER OF ESTABLISHMENTS	NUMBER OF ROOMS	NUMBER OF BEDS
5 STAR HOTELS	189	57.376	121.860
4 STAR HOTELS	384	58.602	121.780
3 STAR HOTELS	577	42.915	87.684
2 STAR HOTELS	687	29.387	58.175
1 STAR HOTELS	113	3.157	6.196
HOLIDAY VILLAGES 1st CLASS	72	22.740	49.410
HOLIDAY VILLAGES 2nd CLASS	22	3.803	8.300
APART HOTELS	110	4.567	11.173
OTHERS	258	8.576	18.752
TOTAL	2.412	231.123	483330

SOURCE: Ministry of Tourism

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Estimated Arrivals in 2010 & 2020

Countries	Tourist Arrivals 2003	Estimation 2010	Estimation 2020	In Mediterranean (%)			(%) 2020	Annual Growth Rate 1995-2020
				1995	2002	2003		
France	75.048	88.237	106.093	36	39.1	34.1	30.7	2.3
Spain	51.830	61.798	73.867	23.3	24.9	23.5	21.4	2.6
Italy	39.604	43.881	52.451	18.6	21.3	18.0	15.2	2.1
Greece	13.969	14.315	17.111	6.1	6.4	6.3	4.9	2.1
TURKEY	13.341	17.068	27.017	4.3	5.4	6.0	7.8	5.5
Yugoslavia	7.409	643	1.669	0.1	-	3.3	0.5	8.3
Egypt	5.746	8.693	17.100	1.7	-	2.6	4.9	7.4
Tunusia	5.114	6.305	8.916	2.5	-	2.3	2.6	3.1
Morocco	4.552	5.465	8.692	1.6	-	2.0	2.5	4.9
Cyprus	2.303	3.041	3.893	1.3	-	1.0	1.1	2.5
Malta	1.127	1.502	1.831	0.7	-	0.5	0.5	2

Source: Ekin, WTO.

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Swot Analysis for Turkey

	British Tourists	German Tourists
Strengths	<ul style="list-style-type: none"> •Sea, sun and sand •Culture, nature and history •Hospitality •Good value for money •Language communication •Local transport services •Quality of accommodation •High level of trip satisfaction •High level of repeat visit 	<ul style="list-style-type: none"> •Sea, sun and sand •Culture, nature and history •Quality of accommodation •Local transport services •Level of prices •Cleanliness and hygiene •High level of trip satisfaction •High level of repeat visit
Weaknesses	<ul style="list-style-type: none"> •Harassment •Lack of cleanliness •Poor signposting •Poor airport facilities & services •Poor air-conditioning 	<ul style="list-style-type: none"> •Harassment •Poor language communication •Lack of cleanliness •Poor signposting •Poor air-conditioning

Source: Kozak 2002

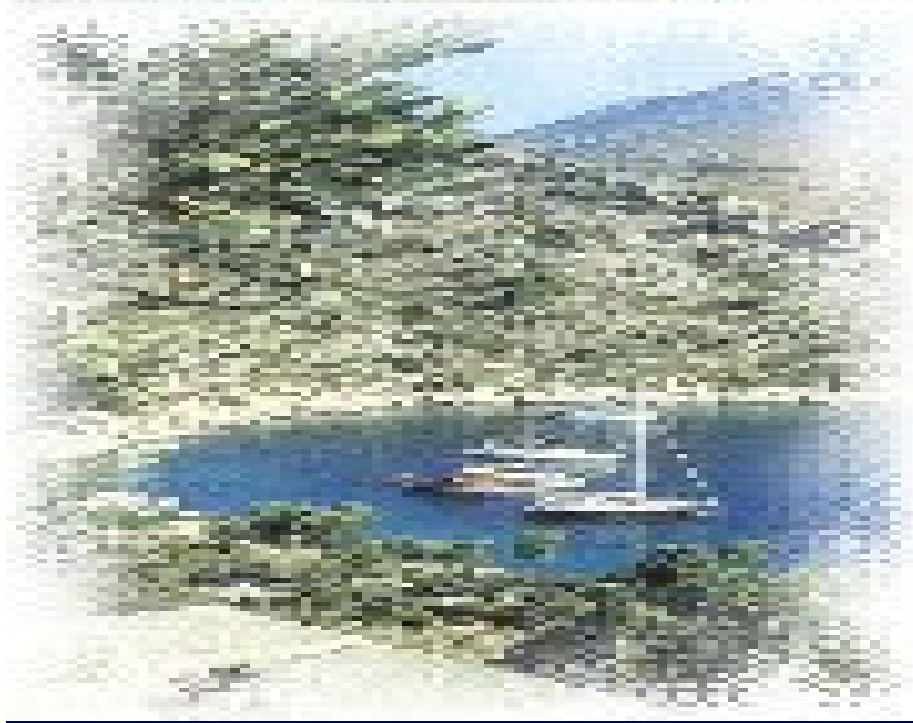
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Main Policies of Turkish Tourism

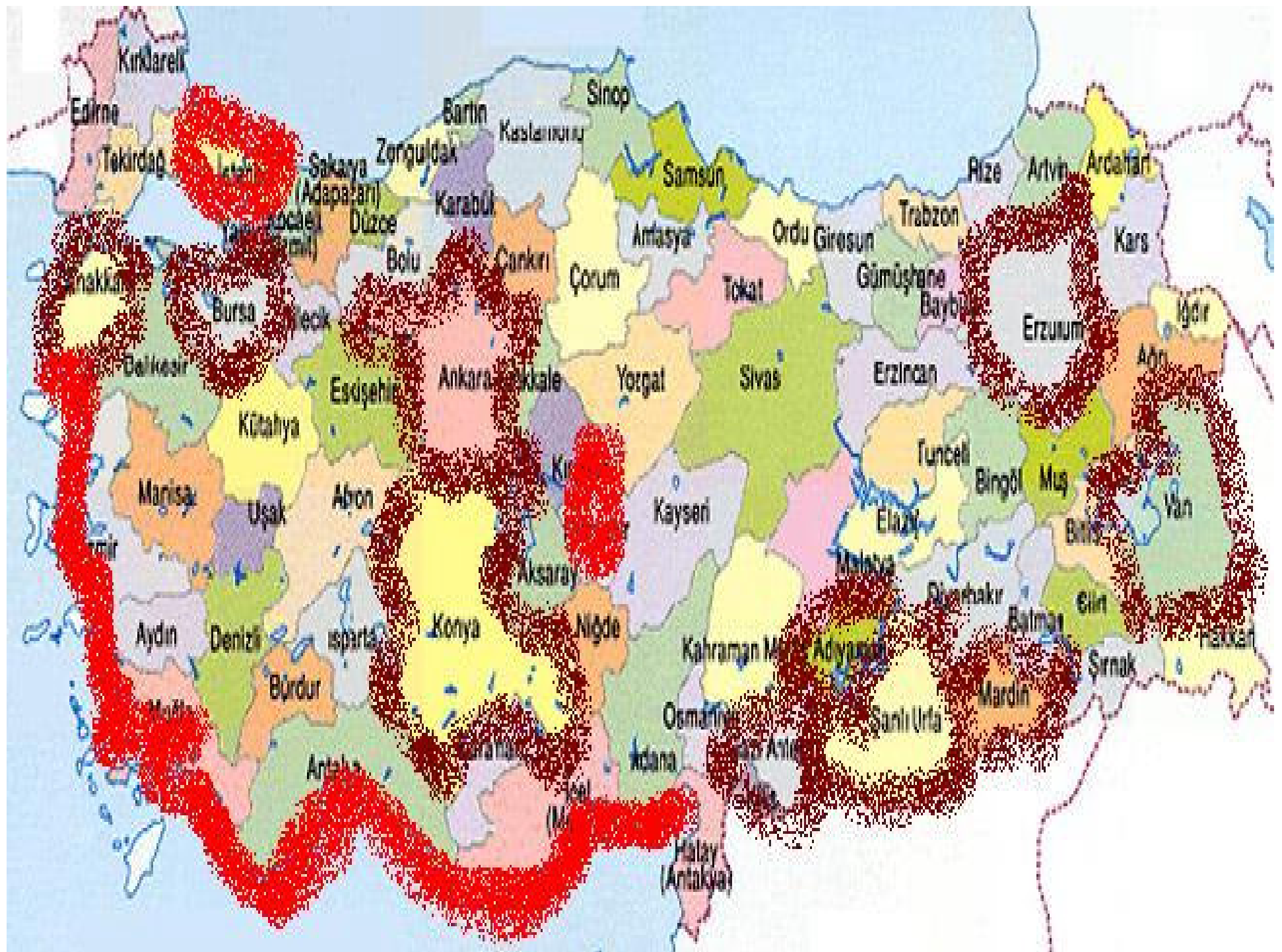
- Developing an efficient and competitive structure
- Enhancing natural resources and cultural heritage
- Creating the best social social environment both for tourists and locals

Contradictions in Tourism Marketing

- Small-scale businesses will be encouraged; there is an increasing capacity of large businesses and more construction
- Nature is significant, but it is at risk now
- Mass tourism will be avoided; still growing and even at risk
- Seasonality problem will be solved; still limited with 3S.
- Service quality will be given more significance; low-paid people are employed.
- Private sector will be encouraged for self-promotion and publicity; public sector is still in progress.
- Selective markets will be a target; but spending pp is still low.
- Inbound tourism will be secured from tour operators; heavily dependent on tourism demand generated through foreign tour operators.







Where Turkey Should Focus?

- ✧ Advertising the physical quality
- ✧ Good value for money
- ✧ Traditional hospitality
- ✧ Turkish food
- ✧ Variety of activities and facilities
- ✧ Differentiated tourism products
- ✧ Location & Climate
- ✧ Accessibility to the transport

The Mediterranean Basin

