

MARKET REPORTS_2013



UNITED STATES OF AMERICA

| | |
|---------------------------------------|---|
| Population | 313,232,044 |
| Tourism Authority | OTTI (Office Of Travel & Tourism Industries) , TIA (Travel Industry Association of America) |
| International Travels | 60.3 million (Source: OTTI) |
| Preferred Foreign Destinations | 42% - Mexico (5.2 million visitors) 14% - Europe (1.8 million visitors) 12% - Caribbean Islands (1.5 million visitors) 12% - Canada (1.5 million visitors) |



UNITED STATES OF AMERICA

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 18.6 Days |
| Target Age Groups | Between 30 - 65 |
| Time for Decision Making | 90 days |
| Reservation Time | December - May |
| Preferred Reservation Type | Internet, Travel Agencies / Tour Operators |
| Preferred Accommodation Type | 5 star luxury hotels, boutique hotels |
| Travel Motivations | Holiday/Entertainment 40%, Cultural and historical places 32%, Family/friends visit 34%, Business 18%, Spa and wellness centers |
| Preferred Season for International Travels | May - October |



UNITED STATES OF AMERICA

TURKEY IN U.S.A MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 757,143 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 17.79 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 220,742 visitors / 1.88 % change |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 10th (2.61 %) |
| Market Share at the Total Arrivals (2011) | 4th |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 120 |
| Preferred Holiday type | Visiting cultural and historical sites, city tours, spa and wellness packages |
| Most visited destinations | 1. Istanbul 2. Cappadocia 3. Kusadasi (Ephesus) |



GERMANY

| | |
|---------------------------------------|--|
| Population | 81,843,809 (2012) |
| Tourism Authority | GNTB (The German National Tourist Board) |
| Total Travels | 76.2 Million <i>fur.de</i> |
| International Travels (pax) | 53.6 Million (2011) <i>fur.de</i> 53.4 Million (2010) <i>fur.de</i> |
| Preferred Foreign Destinations | 1.Spain 12.3% 2.Italy 8.2% 3.Turkey 7.4% 4. Austria 5.2% 5. France 3.0% <i>fur.de(2011)</i> |



GERMANY

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 10.5 days (2011) generally 12.9 days |
| Target Age Groups | Families with children and best ager /18-39 age 85% ADAC |
| Time for Decision Making | 6-12 months before travelling / last minute |
| Reservation Time | 3-6 months before travelling and last minute rises |
| Preferred Reservation Type | 35% travel agency, 28% hotel, 15% internet, 7% Tour operator, 7% Transportation (road, airways, railways etc.) |
| Preferred Accommodation Type | 42% Hotel, 25% acquaintance and relative, 10% apart or room rentals, 10% pension/hostel <i>fur.de (2011)</i> |
| Travel Motivations | Sun Sea Sand, City tours, resting, culture and shopping |
| Preferred Season for International Travels | Summer Season (June, July, August) |



TURKEY IN GERMAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 4,826,315 (<i>Culture and Tourism Ministry</i>) |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 10.06 % (<i>Culture and Tourism Ministry</i>) |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 1,383,153 (-0.32%) (<i>Culture and Tourism Ministry</i>) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | #1 (15.34%) (<i>Culture and Tourism Ministry</i>) |
| Market Share at the Total Arrivals (2011) | 1.Spain 2. Turkey <i>GFK</i> |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 8 main tour operators and approximately 10,370 travel agencies. (TUTI, REWE Group, Thomas Cook, Alltours, FTI, Öger Tours, Schauinsland Reisen, GTI Travel) |
| Preferred Holiday type | Package Tour |
| Most visited destinations | <ol style="list-style-type: none"> 1. Mediterranean 2. Marmara 3. Aegean 4. Middle Anatolia |



NETHERLANDS

| | |
|---------------------------------------|--|
| Population | 16.733.727 |
| Tourism Authority | Ministry of Economy Bureau of Tourism and Congres Center |
| International Travels | The number dutch poeple going to abroad as a holiday: 12;8 million |
| Tourism Expenditure | For holidays in abroad; 12,4 milyar euro (2011) For holidays in the Netherlands: 2,8 milyar euro (2011) |
| Preferred Foreign Destinations | France, Gemany, Spain,Austria, Italy,Turkey, England, Greece, US. |



NETHERLANDS

TOURIST PROFILE

| | |
|-------------------------------------|--|
| Length of stay | 8-11 days |
| Target Age Groups | Young couples without children, families with children, senior people, the ones who like trekking and biking, and active, alternative holiday lovers |
| Time for Decision Making | Between December and April |
| Reservation Time | Between January and May |
| Preferred Reservation Type | Organised travels (%71): via travel agencies, tour operators, banks, booking centers Unorganised travels (%29): via direct from the owner, without advanced booking, without booking etc. |
| Preferred Accommodation Type | 4/5 stars hotels, All inc. Resorts/holiday willages, apart hotels |
| Travel Motivations | Warm climate, resenable prices, hospitality, See-sun-beach, culture and natural sports |



NETHERLANDS

TURKEY IN DUTCH MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 1.222.823 (2011) |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | % 14 |
| Arrivals to Turkey in the First 6 Months of 2012 and Change Percentages | Arrivals to Turkey in the period of January-May 2012: 347.596 (% 3,93) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | % 3,89 number 6 |
| Market Share at the Total Arrivals (2011) | 444.702 % 11,44 increase (2011 / according to week 52.) |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 112 |
| Preferred Holiday type | Sea-sun-beach holidays, cultural holidays, city trips, nature and sport activities |
| Distribution of Incoming Tourist According to the Destinations | Alanya, İstanbul, Side, Antalya, Marmaris, Bodrum ve Nevşehir |



POLAND

| | |
|---------------------------------------|--|
| Population | 38,501,284 |
| Tourism Authority | <ul style="list-style-type: none">- Ministry of Sport and Tourism of the Republic of Poland- Polish Organization of Tourism- Polish Chamber of Tourism- Polish Tourism Development Agency- Institute of Tourism- Polish Union of Tourist Organisers |
| International Travels | 6,300,000 |
| Preferred Foreign Destinations | Turkey, Greece, Egypt, Spain, Bulgaria, Italy, Croatia etc. |



POLAND

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 7-14 days |
| Target Age Groups | 18-50 years |
| Time for Decision Making | 1-6 months |
| Reservation Time | 1-6 months |
| Preferred Reservation Type | organized trip or travelling by self |
| Preferred Accommodation Type | - Hotel, hostel, guesthouse -- summer house, rented house, villa/apartment, youth hostel -- hosted by friends, family |
| Travel Motivations | Beach, see, sun tourism, active tourism, culture tourism |
| Preferred Season for International Travels | April-October |



TURKEY IN POLISH MARKET

| | | | | | | | | | | | |
|---|---|-------|---------|-------|--------|-----|--------|-----|--------|---------|--------|
| Incoming Tourists to Turkey | 486,319 | | | | | | | | | | |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 13.55 % | | | | | | | | | | |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 2011 - 89,462 2012 – 88,728 exchange rate – 0.82 % | | | | | | | | | | |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | Poland among countries sending tourists to Turkey takes 16th place. At the polish market Turkey takes 1st palce . | | | | | | | | | | |
| Market Share at the Total Arrivals (2011) | <table> <tr> <td>Itaka</td> <td>107,000</td> </tr> <tr> <td>Wezyr</td> <td>70,000</td> </tr> <tr> <td>TUI</td> <td>43,000</td> </tr> <tr> <td>GTI</td> <td>35,000</td> </tr> <tr> <td>Sun&Fun</td> <td>16,000</td> </tr> </table> | Itaka | 107,000 | Wezyr | 70,000 | TUI | 43,000 | GTI | 35,000 | Sun&Fun | 16,000 |
| Itaka | 107,000 | | | | | | | | | | |
| Wezyr | 70,000 | | | | | | | | | | |
| TUI | 43,000 | | | | | | | | | | |
| GTI | 35,000 | | | | | | | | | | |
| Sun&Fun | 16,000 | | | | | | | | | | |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 16 | | | | | | | | | | |
| Preferred Holiday type | Beach, See and Sun Tourism, Nature Tourism, Culture Tourism | | | | | | | | | | |
| Most visited destinations | Antalya, Bodrum, Dalaman, Izmir, Cappadocia, İstanbul, Fethiye, Marmaris etc. | | | | | | | | | | |



SWITZERLAND

| | |
|---------------------------------------|--|
| Population | 7,870,100 (2010) |
| Tourism Authority | Schweiz Tourismus (Federal Economy Ministry) |
| International Travels | 15 million |
| Preferred Foreign Destinations | 1.France, 2. Italy, 3.Germany, 4.Spain, 5.Austria, 6.UK, 7. USA, 8.Turkey, 9. Greece, 10.Hungary (2010) |



**Turkey**



SWITZERLAND

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 6,23 Days |
| Target Age Groups | 18-70 |
| Time for Decision Making | After Christmas for Eastern, March-May for summer holidays, August for Autumn (October)holidays, September for Christmas |
| Reservation Time | 47 % : more than 2 months before, 26 % : 2 months before, 16 % : 1 month before, %7: 2 weeks before, %4: Last Minute |
| Preferred Reservation Type | Travel agency and internet |
| Preferred Accommodation Type | 26 %; 2-3 stars hotels, 19 %; 5 stars hotels, 16 %; relative/friend |
| Travel Motivations | 73 %; Relaxation, 63 %; Escape from daily life, 54 %; Meet with different cultures, 45 %; Meet with foreign people, 39 %; Fun, 28 %; sport, 25 %; to be with family, 11 %; health |
| Preferred Season for International Travels | April, July-August, October, December |



Turkey



SWITZERLAND

TURKEY IN SWISS MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 328,825 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 21.28 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 93,581 4.81 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 20 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 90 |
| Preferred Holiday type | Sun-Sea-Sand, culture, golf, yachting, sports |
| Most visited destinations | Antalya, İstanbul, Aegean, Cappadocia, Eastern Anatolia |



AUSTRIA

| | |
|---------------------------------------|--|
| Population | 8,404,252 (2011) |
| Tourism Authority | National Tourism Office of Austria (ANTO) |
| International Travels | 5.3 million people, 16.4 million travels (Resource: Statistic of Austria 2011) |
| Preferred Foreign Destinations | 1. Italy (21%) 2. Croatia(15%) 3. Spain (8%) 4. TURKEY (6%) 5. Greece (5%) 6. Egypt (4%), 7.France (3%), others (38%) Resource: Statistic of Austria 2011 |



AUSTRIA

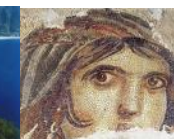
TOURIST PROFILE

| | |
|---|--|
| Length of stay | 5-8 days (Resource: Statistic of Austria 2011) |
| Target Age Groups | 14 - 65 |
| Time for Decision Making | Between December and February, short holidays (city trips) and last minute reservations are getting more important |
| Reservation Time | January –March |
| Preferred Reservation Type | Travel Agencies and internet |
| Preferred Accommodation Type | 46.3 % (4-5 stars) Hotels, Club Hotels and Pensions, 34.5% , Friends-Relatives ans summer residence 19.2%, others (Apart Hotel, Wellness/Health, Camping) |
| Travel Motivations | Hot climate, sea, sports, culture, shopping and gastronomy |
| Preferred Season for International Travels | 78 % summer, 22 % winter. Holidays in foreign countries mostly between May and September |



TURKEY IN AUSTRIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 528,966 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | + 5.73 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 119,645 / - 17.48 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | With 6 % on the 4th Place among the most popular travel destinations |
| Market Share at the Total Arrivals (2011) | With 1.75 % on the 15th Place |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 638 |
| Preferred Holiday type | Antalya, Muğla, İstanbul and Cappadocia Culture/City Tours (30%), Wellness (15%), Beach Holiday (20%), far destination/luxury Holiday (23%) |
| Most visited destinations | Antalya, Muğla, İstanbul and Cappadocia |



UNITED KINGDOM

| | |
|---|--|
| Population | 62,232,000 |
| Name of the tourism authority | Visit Britain |
| Number of International departures | 56.1 million (2011) (Source: Office for National Statistics) |
| Preferred Outbound Destinations | Spain (10.5 million), France (9million), USA (3 million), Ireland (2,9 million), Turkey * (2,6 million), Italy (2,5million), Germany (2 million), Portugal (1,9 million), Nederland (1,7 million) Greece (1,6 million) 2010 – Source: ONS – * Turkish Ministry of Tourism |



UNITED KINGDOM

TOURIST PROFILE

| | |
|---|---|
| Average length of stay in Turkey | 11 days (Source: Office for National Statistics) |
| Target age groups for Turkey | 55+, 45-54, 35-44, 25-34, 16-24 |
| Booking periods for Turkey | The first quarter of the year is the most popular period. (30 % of the package holidays sold). 57 % of package holidays are sold in 12 months before the summer season (Source: GfK) |
| Preferred booking methods for Turkey | 65 % book via travel agency of which 46,5 % internet, 32,2 % personal visit, 15,1 % telephone. (Source: TGI) |
| Preferred accommodation type | Mainly hotels (Self Catering and BB used to be common yet recent years All Inclusive has become popular) Those who visit independently (35 % prefers BB) |
| Travel motivations for Turkey | Good weather, culture and history, great beaches, value for money, friendly people (Source: Mintel) |
| Preferred periods visiting Turkey | 90 % visit between May -October |



UNITED KINGDOM

TURKEY IN BRITISH MARKET

| | |
|--|--|
| Number of the arrivals to Turkey | 2,582,054 (2011) (Source :Turkish Ministry of Culture and Tourism) |
| Change in percentage of the number of arrivals to Turkey 2011/2010 | -3.42% (Source :Turkish Ministry of Culture and Tourism) |
| Number and change in percentage of the arrivals to Turkey in the first 5 months of 2012 | 537,346 / -10.61% (Ministry of Culture & Tourism in Turkey, General Directorate of Investment & Enterprise) |
| Rank of the country in terms of arrival numbers in Turkey (2011) | 3rd place (Source :Turkish Ministry of Culture and Tourism) |
| Rank in the package holiday market | 3rd (Source : Gfk) |
| Number of travel agencies and tour operators operating to Turkey | 180 tour operators, 93 travel agencies (each chain is considered as one agency) |
| Preferred holiday type in Turkey | 65 % of the arrivals are via package holiday. Mainly beach holidays. |
| Preferred destinations in Turkey | 61.8 % Mugla, 16 % Antalya, 14 % Istanbul, 4,4 % Izmir, 3.1 % Aydın |



SWEDEN

| | |
|---------------------------------------|---|
| Population | 9.5 Million |
| Tourism Authority | Swedish Travelling and Tourism Council |
| International Travels | 12.7 Million |
| Preferred Foreign Destinations | Neighbour countries and Spain, Turkey, Italy, Greece, Egypt, Tunisia (Mediterranean), Thailand |



SWEDEN

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 1 week |
| Target Age Groups | Middle income families with children (mass tourism and culture tourism), high income families (thermal and golf) |
| Time for Decision Making | January-May |
| Reservation Time | Since Christmas and through summer last minutes |
| Preferred Reservation Type | Pre reservation/via travel agencies or internet individual organizations |
| Preferred Accommodation Type | Apartment Hotels, All Inclusive |
| Travel Motivations | See-sand-sun, culture, golf and thermal |
| Preferred Season for International Travels | June-July/heavy-August-September |



Turkey



TURKEY IN SWEDISH MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 571,917 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 27.87 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 20.55 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | Antalya became leader destination in 2011 |
| Market Share at the Total Arrivals (2011) | Antalya became leader destination in 2011 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 30 |
| Preferred Holiday type | Mass tourizm (sea+sun+sand), culture, thermal and golf |
| Most visited destinations | Antalya, Bodrum, İstanbul, Marmaris |



NORWAY

| | |
|---------------------------------------|---|
| Population | 4.9 Million |
| Tourism Authority | Norges Turistad |
| International Travels | 3,680,000 |
| Preferred Foreign Destinations | Neighbour countries and Spain, Turkey, Italy, Greece, Egypt, Tunisia (Mediterranean), Thailand |



NORWAY

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 1 week |
| Target Age Groups | Middle income families with children (mass tourism and culture tourism), high income families (thermal and golf) |
| Time for Decision Making | January-May |
| Reservation Time | Since Christmas and through summer last minutes |
| Preferred Reservation Type | Pre reservation/via travel agencies or internet individual organizations |
| Preferred Accommodation Type | Apart Hotels, All Inclusive |
| Travel Motivations | See-sand-sun, culture, golf and thermal |
| Preferred Season for International Travels | June-July/heavy-August-September |



TURKEY IN NORWEGIAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 375,502 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 25.42 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 6.20 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | Antalya became leader destination in 2011 |
| Market Share at the Total Arrivals (2011) | Antalya became leader destination in 2011 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 20 |
| Preferred Holiday type | Mass tourism (sea+sun+sand), culture, thermal and golf |
| Most visited destinations | Antalya, Bodrum, istanbul, Marmaris |



DENMARK

| | |
|---------------------------------------|--|
| Population | 5,6 milion |
| Tourism Authority | 'Visit Denmark Authority' related to Ministry of Trade and Industry |
| International Travels | 15.5 milion (2011) |
| Preferred Foreign Destinations | Germany, Sweden, Spain, Italy, France, Turkey, Greece, Tayland |



DENMARK

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 1 - 2 weeks |
| Target Age Groups | 20-65 |
| Time for Decision Making | February-may |
| Reservation Time | 2-3 month before |
| Preferred Reservation Type | Tour Operator (by using internet and phones) |
| Preferred Accommodation Type | Luxury hotels and holiday villages, apart hotels and camping |
| Travel Motivations | Sea-sand-sun, culture, sport, health and ecology |
| Preferred Season for International Travels | June-October |



TURKEY IN DANISH MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 369,000 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | + 17 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 86,842 + 4.42 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 5th |
| Market Share at the Total Arrivals (2011) | 2nd |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 40 |
| Preferred Holiday type | Sea-sand-sun, wellness, golf, culture and eco tourism |
| Most visited destinations | Antalia, South Egean region and İstanbul |



FINLAND

| | |
|---------------------------------------|---|
| Population | 5,401,267 |
| Tourism Authority | Ministry of Industry and Commerce (Finnish Tourism Board) |
| International Travels | 11,990,000 (2011) 2,091,000 (2011 – only tourism purposes) |
| Preferred Foreign Destinations | Spain, Greece, Turkey, France, USA, Austria, Thailand, Egypt, Bulgaria, Netherlands, Portugal, Poland, Switzerland, Italy, UAE, Croatia (2011) |



FINLAND

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 7 days |
| Target Age Groups | 25-44 and 50+ |
| Time for Decision Making | Oct.-Nov., January-March, June-July and last minute. |
| Reservation Time | Parallel to decision making |
| Preferred Reservation Type | Package tours via tour op. %80, individual trips %20 |
| Preferred Accommodation Type | 2-4 Stars Hotel 70 %, Apart 30 % |
| Travel Motivations | Fun-relaxing (60%), golf, yachting, spa and faith (20%), business (13%), shopping-popularity (10%), cultural urban tourism (15%) |
| Preferred Season for International Travels | February, April-November |



TURKEY IN FINNISH MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 186,562 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 30.28 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 59,708 (-1.02%) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 3rd |
| Market Share at the Total Arrivals (2011) | 3rd in ranking, 15 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 6 |
| Preferred Holiday type | Sea-sand-sun, city tourism, golf, cultural sites, sailing, paragliding, yachting and nature |
| Most visited destinations | Alanya (45%), Marmaris (5%), İstanbul (15%), Fethiye (4%), Belek (7%) ve Bodrum (5%), Side (5%), Antalya (6%), Kemer(5%), İzmir (3%) |



ITALY

| | |
|---------------------------------------|---|
| Population | 60,626,442 (January 2011) |
| Tourism Authority | Ministry of Tourism (Department for Development and Competitiveness of Tourism) , ENIT (National Tourism Agency) |
| International Travels | 2011- 59,086,000 pax 2010- 61,547,000 pax |
| Preferred Foreign Destinations | 2011 : 1-Switzerland 2-France 3-Slovenia 4-Austria 5-Spain 6-Germany 7-UK 8-USA 9-Greece 10-Croatia |



TOURIST PROFILE

| | |
|---|--|
| Length of stay | 7 days |
| Target Age Groups | 18 - 65 age group - middle and high income level |
| Time for Decision Making | Last minute |
| Reservation Time | Last minute |
| Preferred Reservation Type | Internet and travel agencies |
| Preferred Accommodation Type | 3-4-5 star hotels, holiday villages, boutique and apart hotels (travel by caravan is also preferred) |
| Travel Motivations | Natural beauties (sea-beach), history and culture, moderate prices, sports and fun, gastronomy, desire to visit famous destinations and favorite places in cities |
| Preferred Season for International Travels | August, July, September, June, January are the most preferred months. May and April are also important. (End of March and beginning of April is important for Easter holiday) |



TURKEY IN ITALIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 752,238 (2011) |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 12.1% |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 177,970 / -7.1% |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 2.39% / 11th |
| Market Share at the Total Arrivals (2011) | N/A |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 58 |
| Preferred Holiday type | Sea, culture/city, faith, shopping |
| Most visited destinations | İstanbul & Cappadocia (55%), İzmir (21%), Muğla (11%), Antalya (8%) |



SPAIN

| | |
|---------------------------------------|--|
| Population | 47,150,800 |
| Tourism Authority | Ministry of Industry Trade and Tourism |
| International Travels | 13,346,738 |
| Preferred Foreign Destinations | European countries (France, Portugal, Italy), Morocco, Croatia, Latin American countries and Turkey |



SPAIN

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 7 days |
| Target Age Groups | 25-54 age group, middle-and upper-income women and men aged between 18-29 and 40-54 |
| Time for Decision Making | After January for the summer holidays, after September for winter holidays |
| Reservation Time | 1 month before the long holidays, last minute short holidays |
| Preferred Reservation Type | Internet and travel agents |
| Preferred Accommodation Type | 4-5 star hotels, friend's house, home rentals and timeshare |
| Travel Motivations | Culture, sports, health, faith, marine tourism, honeymoon, congresses and insentif |
| Preferred Season for International Travels | Easter Holiday months, from June to August, at Christmas time |



TURKEY IN SPANISH MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 300,084 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | -6.61 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 85,913 (+7,2%) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 13 (WTO 2010) |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 39 |
| Preferred Holiday type | Culture / religion tourism and marine tourism |
| Most visited destinations | Cappadocia, Istanbul, the Aegean and Mediterranean |



FRANCE

| | |
|---------------------------------------|--|
| Population | 65,027,000 |
| Tourism Authority | Tourism Consultancy |
| International Travels | 13,6 million (2010) |
| Preferred Foreign Destinations | Spain, Italy, Belgium-Luxemburg, Germany, England, Morocco and Turkey |



FRANCE

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 17 days |
| Target Age Groups | 25 years old and over |
| Time for Decision Making | Two months earlier |
| Reservation Time | Within the last month |
| Preferred Reservation Type | Internet |
| Preferred Accommodation Type | Furnished rent, camping and hotel |
| Travel Motivations | Cultural tourism, Urban tourism, seaside and trekking |
| Preferred Season for International Travels | July-August and December |
| Average Expenditure per Person | 500 € |



FRANCE

TURKEY IN FRENCH MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 1,149,459 (2011) |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | + 23 % |
| Arrivals to Turkey in the First 6 Months of 2012 and Change Percentages | - 17,27 % (first six months) |
| Rank and Market Share at the Total Arrivals to Turkey (2011) | 8th rank |
| Market Share at the Total Arrivals (2011) | Marmara / Nouvelles Frontières, Thomas Cook, Pacha Tours, Blue Days, Fram, Look Voyages, Mavie / IQ, HAVAS, IGL, Mondo Terra, Turquie Vision, Jet Tours |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | Almost 40 Tour Operators and about 800 agencies (selling Tour Operators' programmes) |
| Preferred Holiday type | Cultural tourism, Urban tourism, seaside and trekking |
| Most visited destinations | 1-Istanbul 2-Antalya and surroundings 3-Bodrum and surroundings 4- Cappadocia 5- South Coasts of Izmir and Ephesus 6- Anatolia tours with cultural purpose |



BELGIUM

| | |
|---------------------------------------|--|
| Population | 10,896,000 |
| Tourism Authority | The federal state of Belgium has two authorities: Flandres, minister Geert Bourgois and Wallonia, minister Paul Furlan. |
| International Travels | 2,320,000. Summer and Winter holidays Source Abto |
| Preferred Foreign Destinations | 1. Spain 2. France 3. Turkey 4. Greece 5. Italy 6. Tunisia 7. Germany 8. Egypt 9. Austria 10. Morocco |



BELGIUM

TOURIST PROFILE

| | |
|---|---|
| Length of stay | Two weeks preferred by 48% of Belgians One week preferred by 12% of Belgians |
| Target Age Groups | 60 plus target group which is growing by 3% a year. |
| Time for Decision Making | Up to six months in advance, but the last minute reservations up to a couple of days before the trip is growing. |
| Reservation Time | Between six months and a couple of days |
| Preferred Reservation Type | Tour operators direct or online. Growing importance of the internet direct bookings even without tour operators. |
| Preferred Accommodation Type | Hotel |
| Travel Motivations | Sun Sea and pleasure |
| Preferred Season for International Travels | Summer Holidays |



TURKEY IN BELGIAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 585,860 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | +7.89% |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 138,460 – 7.46 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 1.86% Place 7th in Europe |
| Market Share at the Total Arrivals (2011) | 1.86% |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | Jet AIR, Thomas Cook, Pegase, Neckermann, Correndon, Desti Travel, Club Med (7) cover more than 90% of the market. |
| Preferred Holiday type | Sun and Sea vacations (61%) Round trips (25%) Mountains (20%) and City (12%) |
| Most visited destinations | 1. Antalya. 2 Istanbul 3. Bodrum 4. Kusadasi |



BOSNIA AND HERZEGOVINA

| | |
|---------------------------------------|---|
| Population | 4,622,163 |
| Tourism Authority | *Federal Ministry of Enviroment and Tourism *Ministry of Trade and Tourism of Republic of Srpska |
| Preferred Foreign Destinations | Croatia, Montenegro, Serbia, Turkey, Scandinavian Countries, Germany, Austria and Egypt |



BOSNIA AND HERZEGOVINA

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 1 week |
| Preferred Reservation Type | Tour package vacation by Tour Operator |
| Preferred Accommodation Type | 3-4 star hotels, Holiday Village |
| Travel Motivations | Tour package price, All inclusive, Historical ties |
| Preferred Season for International Travels | May, June, July, August and September |



BOSNIA AND HERZEGOVINA

TURKEY IN BOSNIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey 2011 | 56,522 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 19.60 % |
| Arrivals to Turkey in the First 6 Months of 2012 and Change Percentages | 18,528, 13.18 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 10 |
| Preferred Holiday type | Mass Tourism (sea- sand - sun) and Cultural Tourism |
| Most Visited Destinations | Istanbul, Antalya, Marmaris, Bodrum, Kuşadası, Side and Bursa |



BULGARIA

| | |
|---------------------------------------|--|
| Population | 7,093,635 (July 2011) |
| Tourism Authority | Ministry of Energy, Economy and Tourism |
| International Travels | 1,060,612 |
| Preferred Foreign Destinations | Turkey, Greece, Romania, Serbia |



BULGARIA

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 7 days |
| Target Age Groups | 25-64 year-old people |
| Time for Decision Making | January-May |
| Reservation Time | March-May |
| Preferred Reservation Type | 80% by a tour operator, 20% other |
| Preferred Accommodation Type | They prefer to stay in a friend's house, hotel or to rent a house. Generally 3-4 star hotels and package programs are preferred. In the recent years, as a result of the growing economy, an increase in the travelling potential and demand of the Bulgarian citizens has been observed. |
| Travel Motivations | Geographical proximity, good climate, suitable prices and service quality |
| Preferred Season for International Travels | May-September, December |



TURKEY IN BULGARIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 1,491,561 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 4.02 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 509,286, -8.27 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 4.74%, 5th rank |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 30 |
| Preferred Holiday type | Sea, Culture, Shopping and Religion |
| Most visited destinations | Efes and Kusadasi (because of the interest in St.Mary), with the start of the charter flights – Antalya, Bodrum, Izmir, also the interest in Istanbul is bigger in the weekends; Cappadocia is a potential destination. |



ROMANIA

| | |
|---------------------------------------|--|
| Population | 21,904,551 (July 2011) |
| Tourism Authority | Ministry of Regional Development and Tourism |
| International Travels | 9,999,000 |
| Preferred Foreign Destinations | Turkey, Bulgaria, Greece, Spain, Italy, Croatia |



ROMANIA

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 7-15 days |
| Target Age Groups | 25-50 year-old people |
| Time for Decision Making | January-May |
| Reservation Time | March-May |
| Preferred Reservation Type | 75 % by a tour operator, 15 % other, 10 % online |
| Preferred Accommodation Type | When visit Turkey Romanian tourists prefer 3-4-5-star hotels, all inclusive |
| Travel Motivations | Geography proximity, no visa problems, good climate, currency of the all inclusive concept, suitable prices and service quality |
| Preferred Season for International Travels | June-August |



TURKEY IN ROMANIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 390,248 people |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 9.88 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 103,861 people 5.79 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 1.24 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 30 |
| Preferred Holiday type | Sea, Culture, Shopping, Religion |
| Most visited destinations | Antalya (60% Kemer, Belek, Side, Alanya), Marmaris, Fethie and Bodrum. Also, by car from Buchares Romanians visit Canakkale, Istanbul and Kusadasi. |



GREECE

| | |
|---------------------------------------|---|
| Population | 10,760,136 (July 2011) |
| Tourism Authority | Ministry of Culture and Tourism |
| Preferred Foreign Destinations | Turkey, France, Spain, Italy, Egypt, Morocco |



GREECE

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 1 week or 3-4 night accommodation, short vacations are preferred |
| Target Age Groups | 25-34 year-old people |
| Time for Decision Making | January-March |
| Reservation Time | March-May |
| Preferred Reservation Type | 80 % by a tour operator, 20% other |
| Preferred Accommodation Type | 3-4-star city hotels, if it is all inclusive program - 4-5-star hotels |
| Travel Motivations | Sea, culture, sport (winter sports), nature, shopping, gastronomy and suitable prices |
| Preferred Season for International Travels | March-August, October-November |



TURKEY IN GREEK MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 702,017 people |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 4.73 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 241 766 -4.64 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 2.23 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 60 |
| Preferred Holiday type | Cultural and religious tours are preferred to sea vacations in addition to the suitable prices |
| Most visited destinations | Ege destinations like Istanbul, Kusadasi, Bodrum, Cesme and Marmaris; also Black sea region; Cappadocia and East Anatolia are potential destinations. |



SERBIA

| | |
|---------------------------------------|---|
| Population | 7,120,666 (2011 statistics - excluding Kosovo) |
| Tourism Authority | Ministry of Economy and Regional Development, Tourism Department |
| International Travels | 802,499 by travel agencies (2011 statistics) |
| Preferred Foreign Destinations | Greece, Montenegro, Turkey, Croatia, Egypt, Tunisia, Spain |



SERBIA

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 10 days |
| Target Age Groups | High-income educated people who love travelling, people older than 25, families |
| Time for Decision Making | March - June |
| Reservation Time | Last minute |
| Preferred Reservation Type | Tour-operators and travel agencies |
| Preferred Accommodation Type | Package tour arranged hotels, All-inclusive hotels |
| Travel Motivations | Sun-sea-sand, culture, shopping, skiing |
| Preferred Season for International Travels | June – September, November – March (skiing/winter holidays) |



TURKEY IN SERBIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 137,934 (2011) |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 21.57 %(2011/2010) |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 40,520 14 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 0.44 % (2011) |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | Travel Agencies: 150 Tour Operators: 8 |
| Preferred Holiday type | Sun-sea-sand, culture |
| Most visited destinations | Antalya (Alanya, Kemer), İstanbul, Kuşadası, Marmaris, Bodrum |



CROATIA

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 4 (7-10 days summer holidays / lately increased demand for extended weekend programs and city breaks (2-4 days) |
| Target Age Groups | High-income educated people who love travelling, people older than 25, families |
| Time for Decision Making | last minute decisions |
| Reservation Time | end of May and June. Lately most Croatian tourist prefer travelling in June or September when the prices in foreign destinations are lower |
| Preferred Reservation Type | via travel agencies - direct booking / lately increase of on line booking |
| Preferred Accommodation Type | Hotels and all-suite hotels, Apartments, Tourist Resorts |
| Travel Motivations | Leisure, recreation, culture, sport and entertainment |
| Preferred Season for International Travels | spring / summer |



SLOVENIA

| | |
|---------------------------------------|---|
| Population | 2,055,496 |
| Tourism Authority | Ministry of Economic Development and Technology - Tourism and Internationalisation Directorate |
| International Travels | 2,668,960 |
| Preferred Foreign Destinations | Croatia, Austria, Italy, Bosnia & Herzegovina, Serbia, Germany, France |



SLOVENIA

TOURIST PROFILE

| | |
|---|--|
| Length of stay | travel: 2–5 days, longer tours up to 12 days; holidays 1 week |
| Target Age Groups | 25-44 (957000 travels abroad), 45-64 (755000 travels abroad) |
| Time for Decision Making | first minute (holidays: from 5 to 2 months prior) or last minute (1 week up to 1 day before); travel: 1 month up to 3 days prior |
| Reservation Time | first minute (from 5 to 2 months prior, or last minute 1 week up to 1 day before) |
| Preferred Reservation Type | private arrangement for Croatia, tour operators for international travels and holidays |
| Preferred Accommodation Type | holidays: apartments and hotels 4*, 5*; travel: hotels from 2*/3* |
| Travel Motivations | Relaxation/resting, sightseeing, recreation |
| Preferred Season for International Travels | Holidays: May – October; skiing: November – March; travel: April – June, September – November |



TURKEY IN SLOVANIAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 41,870 (2011), 12,023 (January-May 2012) |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 8.48% |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 12,023, 13.18 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 0.13% |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | Holidays tour operators 7 Travel tour operators: 8 Travel agencies: more than 20 |
| Preferred Holiday type | Relaxation/resting, sightseeing |
| Most visited destinations | Istanbul, Kapadokya, Kamp alanları, Antalya |



MACEDONIA

| | |
|---|---|
| Population | 2,066,718 |
| Tourism Authority | Ministry of Economy ATAM (Association of Travel Agencies of Macedonia) Chamber of Tourism and Economy |
| Number of Travel Agencies and Tour Operators | 460 |



MACEDONIA

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 15 days |
| Target Age Groups | 18-50 age group |
| Preferred Accommodation Type | Hotel, motel ve pension |
| Travel Motivations | Culture, nature and business tourism |
| Preferred Season for International Travels | <ul style="list-style-type: none">• between 15 June – 15 August ,• Christmas and following period (Noel of Orthodox),• For Albanian, Turkish, Bosnian and Moslem population Ramadan period |



MACEDONIA

TURKEY IN MACEDONIAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 115,541 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 7.59 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 38,786 / 9.12 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 20 |
| Distribution of Incoming Tourist According to the Destinations | Marmara Region, Aegean Region, Mediterranean Region and other destinations |
| Most effective promotion type and period | Outdoor/ Printed and visual media, March –June, September-October |



RUSSIA

| | |
|---------------------------------------|---|
| Population | 143,000,000 |
| Tourism Authority | Federal Agency for Tourism |
| International Travels | 14,500,000 |
| Preferred Foreign Destinations | Turkey, China, Egypt, Finland, Thailand, Germany, Spain, Greece, Italy |



RUSSIA

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 9-10 days |
| Target Age Groups | 20-50 |
| Time for Decision Making | Generally in last minute |
| Reservation Time | At least 1 month before the holiday and last-minute sale |
| Preferred Reservation Type | Tour operators package tour |
| Preferred Accommodation Type | All - Inclusive 5 and 4 star hotels, resorts |
| Travel Motivations | Coastal tourism, cultural tourism, shopping, winter tourism |
| Preferred Season for International Travels | July-August, May-June, September and Christmas |



TURKEY IN RUSSIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 3,468,214 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 11.6 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | -6.74 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 2 |
| Market Share at the Total Arrivals (2011) | 1- Turkey, 2- Egypt, 3- Thailand, 4- Spain, 5- Greece, |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 50 tour operators, more than 10 000 travel agencies |
| Preferred Holiday type | 85% of Russian tourists visit Turkey for the purpose of coastal tourism |
| Most visited destinations | Antalya 78 %, Istanbul 14 %, Izmir 1 %, others 2 % |



UKRAINE

| | |
|---------------------------------------|--|
| Population | 45,573,607 (1 May 2012) |
| Tourism Authority | Ministry of Infrastructure of Ukraine; State Agency of Tourism and Resorts of Ukraine |
| International Travels | In 2011, total number of international travelers for tourism – 1 395 257 people. |
| Tourism Expenditure | Private business and international organizations invest tourism in Crimea. 5 million Euro were financed by the European Union to support the project of tourism development in Autonomous Republic Crimea. The project will be realized within three years (2012-2014). Also 1 billion hrn. were invested by private business of Ukraine for tourism development in Crimea in 2012. |
| Preferred Foreign Destinations | Turkey, Croatia, Montenegro, Greece, Bulgaria, Spain, Egypt, Israel, Thailand and the UAE. |



TOURIST PROFILE

| | |
|---|--|
| Length of stay | 10 days (average) |
| Target Age Groups | <ul style="list-style-type: none"> • 22-45 years with middle income. Are ready to rest abroad from time to time on cheap beach resorts or buy sightseeing tours in Europe. • 22-45 years with high and above the average income. Rest abroad at regular basis. |
| Time for Decision Making | 60% potential tourists think about the rest for 1 to 2 months before it started, almost 30% potential tourists decide to 1-2 weeks before travel. About 10% make decision at once and buy the latest offerings. |
| Reservation Time | The average reservation period is 20 days |
| Preferred Reservation Type | Package tour |
| Preferred Accommodation Type | 4-5 star hotels |
| Travel Motivations | Simplicity of visa obtaining, climate, flights duration, all inclusive, service, quality, entertainment etc. |
| Preferred Season for International Travels | Summer, velvet season, May and New Year holidays |



TURKEY IN UKRANIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 602,404 persons in 2011 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | increased by 6% |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 181,015 visitor arrived to Turkey and Change Percentages is 0.22% compared to the same period in 2011 |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 1 |
| Market Share at the Total Arrivals (2011) | 1 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | Total number is 7 500. Number of tour operators is 6. 80-90% of travel agencies and tour operators making operations to Turkey. |
| Preferred Holiday type | Sun-sand-sea, culture and winter tourism |
| Most visited destinations | Distribution of Incoming Tourist from Ukraine according to the destinations <u>in 2011</u>: Antalya-58.3%, Istanbul -25.7%, Mugla - 6.8%, other destination-9.2%. |



KAZAKHSTAN

| | |
|---------------------------------------|---|
| Population | 16,009,597 (2011) |
| Tourism Authority | Tourism Industry Committee Kazakhstan Tourist Association Kazakhstan Association of Hotels & Restaurants |
| International Travels | 207,495 (2011- According to The Agency of Statistics of The Republic Of Kazakhstan) |
| Tourism Expenditure | 869,000 USD (2011-According to Kazakhstan Tourist Association) |
| Preferred Foreign Destinations | Turkey , U.A.E., Thailand, Malaysia, Egypt, The Czech Republic,Crotia, Bulgaria, Germany, Spain, Russia |



KAZAKHSTAN

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 10 days |
| Target Age Groups | Families with children, middle age group (30-45) |
| Time for Decision Making | Before 1-2 months |
| Reservation Time | 1-2 weeks |
| Preferred Reservation Type | Travel agencies, face to face |
| Preferred Accommodation Type | Ultra all inclusive, villa accommodation |
| Travel Motivations | Sea-sand-sun, health, shopping, culture |
| Preferred Season for International Travels | Summer season (between may- september) Winter season (Christmas holidays) |



KAZAKHSTAN

TURKEY IN KAZAKSTANI MARKET

| | |
|---|----------------------------------|
| Incoming Tourists to Turkey | 315,907 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 27.49 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 83,175 28.80 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 24. (2011) |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | About 30 |
| Preferred Holiday type | Sea-sand-sun, shopping |
| Most visited destinations | Antalya, Bodrum, Marmaris |



AZERBAIJAN

| | |
|---------------------------------------|--|
| Population | 9, 111,100 |
| Tourism Authority | Ministry of Tourism |
| International Travels | 3,175, 606 |
| Preferred Foreign Destinations | Russia, Georgia, iran, Turkey, Ukrain |



AZERBAIJAN

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 10 days |
| Target Age Groups | 18-45 age |
| Time for Decision Making | Before 1 week |
| Reservation Time | 1 month |
| Preferred Reservation Type | Travel agencies |
| Preferred Accommodation Type | All inclusive |
| Travel Motivations | Sea-sand-sun, shopping, culture |
| Preferred Season for International Travels | June, July, August |
| Average Expenditure per Person | 700—1500 USD |



AZERBAIJAN

TURKEY IN AZERI MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 579,685 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 18,98 % |
| Arrivals to Turkey between January-May Months of 2012 and Change Percentages | 194,543 /-15,90 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 4 |
| Market Share at the Total Arrivals (2011) | 1 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 85 |
| Preferred Holiday type | Sea-sand-sun |
| Most visited destinations | Istanbul, Antalya, Bodrum, Mediterranean, Izmir, Aegean, Black sea |



KYRGYZSTAN

| | |
|---------------------------------------|--|
| Population | 5,571,200 |
| Tourism Authority | The Ministry of Culture and Tourism of Kyrgyzstan |
| Preferred Foreign Destinations | Turkey, UAE, Egypt, France |



KYRGYZSTAN

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 7-15 days |
| Target Age Groups | 16-50 Age Groups |
| Time for Decision Making | One month before the travel |
| Reservation Time | Once week before the travel |
| Preferred Reservation Type | Travel agency |
| Preferred Accommodation Type | Pension, holiday villages and 3,4,5 Star Hotels |
| Travel Motivations | Travel, shopping, culture, religious tourism |
| Preferred Season for International Travels | April-December month |



TURKEY IN KYRGYZ MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 44,183 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 15.51% |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 12,244 12.59 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 68 |
| Preferred Holiday type | Travel, shopping, culture, religious tourism |
| Most visited destinations | Istanbul, Kemer, Izmir, Antalya, Pamukkale, Ankara |



UNITED ARAB EMIRATES

| | |
|--|--|
| <p>Population</p> | <p>6,900,000 people (2010) 16.6% Emirati (Citizens), 23% Other Arabs, 42.3% South Asian: Indian, Pakistani, Bangladeshi 12.1% Other Asian communities, including China, the Philippines, Thailand, Iran, Korea & Afghanistan. 6% Western expatriates, from Europe, Australia, Northern Africa, Africa and Latin America</p> |
| <p>Tourism Authority</p> | <p>All of the seven emirates has its own tourism authority.</p> |
| <p>International Travels</p> | <p>Almost most of the Emirati citizens (&16.6 of whole population) travel internationally.</p> |
| <p>Tourism Expenditure</p> | <p>10 billion USD</p> |
| <p>Preferred Foreign Destinations</p> | <p>England, Germany, France, Switzerland, Spain, Greece and South Cyprus are opponents of Turkey. Egypt, Syria, Lebanon and Morocco are also favourite destinations for Arabs.</p> |



UNITED ARAB EMIRATES

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 1 week |
| Target Age Groups | People aged 30 yo and above with high-income. |
| Time for Decision Making | Last minute |
| Reservation Time | Last minute |
| Preferred Reservation Type | Travel agents |
| Preferred Accommodation Type | 4-5 stars hotels |
| Travel Motivations | Shopping, nature, culture and history |
| Preferred Season for International Travels | April – September (Number of the tourists are expected fall substantially due to Holy Ramadan next 4-5 years) |



UNITED ARAB EMIRATES

TURKEY IN U.A.E MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 35,579 (2011) This number shows just Emirates citizens who are %16.6 of whole population. Numbers of people visiting Turkey with or without visa from U.A.E. are not included in this figure. |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 16.73 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 13,691 80.45 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 0.11 % This number shows just Emirates citizens who are %16.6 of whole population. Numbers of people visiting Turkey with or without visa from U.A.E. are not included in this figure. |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | No Specialist tour agents for Turkey |
| Preferred Holiday type | Shopping, nature, culture and history |
| Most visited destinations | Istanbul, Bursa, Yalova and other destinations |



KINGDOM OF SAUDI ARABIA

| | |
|---|---|
| Country Population | 27,136 millon (8,429 millon foreigner – 2010 census) |
| Tourism Authority | Saudi Comitee for Tourism & Antiquities |
| Number of Peoples Travel Inretnationally | About 8 millon person |
| Preferred Destinations | Bahreyn, UAE, Kuwait, Egypt Turkey, Malaysia, Indonesia, England, Austria, Switzerland USA, Australia, |



KINGDOM OF SAUDI ARABIA

TOURIST PROFILE

| | |
|--|--|
| The Average Length of Stay | 15-30 days |
| The average Age of the Target Group | 18-65 |
| Desicion-Making Time | April - May |
| Rezervation Time | May – June |
| Preferred Type of Reservation | Airlines, Travel Agencies, directly from hotels and internet. |
| Preferred Type of Accommodation | Private/apartment: 54.2 %, Hotel: 25.6%, Pension: 18% |
| Travel Motivations | Safety, Ticket and accommodation prices, Climate, entertainment and shopping opportunities, Religion-Language-Cultural Partnership. |
| Preferred Period of Outgoing | May-July |



KINGDOM OF SAUDI ARABIA

TURKEY IN SAUDI ARABIAN MARKET

| | |
|---|--|
| The amount of Coming Courists to Turkey 2011 | 116,711 Person |
| The Rate Change in the Amount of Tourists Comig to Turkey 2010/2011 | 37,41 % |
| The amount of arrivals in first 5 months of 2012 and Rate of Change | 39,609 Rate of Change: 2011/2012: 61.39% |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 100 Agencies |
| Preferred Holiday type | Highland Tourism, Thermal Tourism |
| Most visited destinations | İstanbul, Yalova, Bursa, Eastern Black Sea , Hatay, Antalya |



EGYPT

| | |
|---------------------------------------|---|
| Population | 81,584,000 (July 2012) |
| Tourism Authority | Ministry of Tourism Egyptian Tourism Development Authority Egyptian Travel Agents Association Egyptian Tourism Federation Egyptian Hotel Association |
| International Travels | 4.5 million |
| Preferred Foreign Destinations | Turkey, Araps Countries (U.A.E ve Saudi Arabia) and European Countries |



EGYPT

TOURIST PROFILE

| | |
|---|---|
| Length of stay | Two weeks |
| Target Age Groups | Between 15 – 45 |
| Time for Decision Making | Last minute |
| Reservation Time | Especially summer, whole year |
| Preferred Reservation Type | Tour operators, privately |
| Preferred Accommodation Type | Hotel, holiday village and pension |
| Travel Motivations | Shopping, culture, religious |
| Preferred Season for International Travels | June-September |
| Average Expenditure per Person | 1500 USD |



EGYPT

TURKEY IN EGYPTIAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 79,665 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 17,87 % |
| Arrivals to Turkey in the First 6 Months of 2012 and Change Percentages | 62,57 % (first five months) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 0,40 % |
| Market Share at the Total Arrivals (2011) | After Spain |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 1176 |
| Preferred Holiday type | Shopping, culture, religious |
| Most visited destinations | Istanbul, Antalya, Bursa, Izmir and partly Black sea |



ISRAEL

| | |
|---------------------------------------|---|
| Population | 7.4 million |
| Tourism Authority | Israel Tourism Ministry |
| International Travels | 1.9 million |
| Preferred Foreign Destinations | 1-USA, 2-Greece and Greek Islands 3-Malta 4-France 5-Italy 6-Spain |



ISRAEL

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 5-6 days |
| Target Age Groups | Under age of 18 and between 45 and 60 ages |
| Time for Decision Making | The Last Minute Reservations |
| Reservation Time | 15-20 days before |
| Preferred Reservation Type | through travel agencies and Internet |
| Preferred Accommodation Type | All inclusive price |
| Travel Motivations | Natural Beauties, culture, sports and entertainment |
| Preferred Season for International Travels | July-August |
| Average Expenditure per Person | 550-600 USD |



Turkey



TURKEY IN ISRAELI MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 75,432 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 27,63 % |
| Arrivals to Turkey in the First 6 Months of 2012 and Change Percentages | 24,283 Rate of change: 18,79 % |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 12 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 7 Big Tour Operations and approximately |
| Preferred Holiday type | 1-Sea –Sand –Sun 2-Hiking-Trekking |
| Most visited destinations | Antalya, İstanbul, Muğla |



CHINA

| | |
|---------------------------------------|--|
| Population | 1,313 million |
| Tourism Authority | China National Tourism Administration (CNTA) |
| International Travels | 70.25 million (2011) (71 % of this figures travels to Hong Kong ,Macao and Taiwan) |
| Preferred Foreign Destinations | Hong Kong, Macau, Taiüwan, Japan, S.Korea, Malaysia, Maldives, Tayland,USA,England, France. |



CHINA

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 7-10 days |
| Target Age Groups | 20-45 age |
| Time for Decision Making | August-December |
| Reservation Time | 1 month |
| Preferred Reservation Type | Package tour |
| Preferred Accommodation Type | 5 star hotels |
| Travel Motivations | Culture, history, shopping, cuisine, security, nature beauty |
| Preferred Season for International Travels | February (Chinese New Year) October (National Day Holiday) |



Turkey



TURKEY IN CHINESE MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 100,000 (2011) |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 25.35 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 13.77% |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | First 20 |
| Market Share at the Total Arrivals (2011) | First 20 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 500 |
| Preferred Holiday type | City Tour, Culture tourism , Shopping |
| Most visited destinations | İstanbul, Cappadocia, Pamukkale, Kuşadası, İzmir, Antalya |



JAPAN

| | |
|---------------------------------------|--|
| Population | 127,530,000 |
| Tourism Authority | Ministry of Land Infrastructure, Transportation and Tourism Japan Tourism Agency |
| International Travels | 16,994,200 |
| Preferred Foreign Destinations | China, South Korea, Hong Kong, Taiwan, Tailand Hawaii, ABD, Europe: France, Germany, Italy, Spain |



JAPAN

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 5-7 days; Lang Haul Destianations: 8-14 days |
| Target Age Groups | <ul style="list-style-type: none">•20-30 Women•30-40 Men and Women (specificially have have business career)•Seniors who have high level of income, intellegence and like travelling |
| Time for Decision Making | 2-3 months prior |
| Reservation Time | Min. 1 month prior |
| Preferred Reservation Type | Internet, agencies |
| Preferred Accommodation Type | Luxury Hotels |
| Travel Motivations | Nature, historical places, architecture, cuisine, shopping |
| Preferred Season for International Travels | March-May, August-October |



TURKEY IN JAPANESE MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 188,312 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | - 3.63 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 76,732 6.88 % |
| Market Share at the Total Arrivals to Turkey (2011) | 0.65 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | Tour Operator: 25 (Aprx) Travel Agencies: 69 (Aprx) |
| Preferred Holiday type | Historical and Cultural Places, Nature, UNESCO World Heritages |
| Most visited destinations | İstanbul, Cappadocia, Konya, Denizli, Çanakkale, Safranbolu, İzmir |



SOUTH KOREA

| | |
|---------------------------------------|---|
| Population | 50,515,000 |
| Tourism Authority | Ministry of Culture , Sports and Tourism http://www.mcst.go.kr |
| International Travels | 12,693,733 |
| Preferred Foreign Destinations | China, Japan, Thailand, USA, HongKong, Philippine, Macao, Singapore, Taiwan, Malaysia |



SOUTH KOREA

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 7.7 days |
| Target Age Groups | •20'-30' women •40+ men and women who have high level of income intelligence and like travelling |
| Time for Decision Making | 2~3 months prior to travel |
| Reservation Time | 1~2 months prior to travel |
| Preferred Reservation Type | Internet-Agencies |
| Preferred Accommodation Type | Hotels |
| Travel Motivations | Relaxing, Nature, Historical Places, Shopping |
| Preferred Season for International Travels | July for summer holiday |



SOUTH KOREA

TURKEY IN SOUTH KOREAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey (Y2011) | 149,943 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 21.59 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 65,549 5.17 % |
| Market Share at the Total Arrivals (2011) | 0.52 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | Around 60 travel agencies make travel products for Turkey and almost 7,929 travel agencies are selling tour packages to Turkey in Korea. |
| Preferred Holiday type | History, Culture, Religion, Appreciation of nature & Landscape, Unesco World Heritage Sites |
| Most visited destinations | Istanbul , Antalya, Izmir, Cappadocia, Denizli, Ankara, Konya, Çanakkale |



MALAYSIA

| | |
|---------------------------------------|--|
| Population | 29,365,538 |
| Tourism Authority | Ministry of Tourism Malaysia |
| International Travels | 8,080 million |
| Preferred Foreign Destinations | Thailand, China, Indonesia, Singapore, Hong Kong, Australia, India, Vietnam, Taiwan and South Korea |



TOURIST PROFILE

| | |
|---|--|
| Length of stay | 10-15 days |
| Target Age Groups | 25-44 ages |
| Time for Decision Making | Before 1 and 2 months |
| Reservation Time | Last minute |
| Preferred Reservation Type | Travel agency |
| Preferred Accommodation Type | Hotel |
| Travel Motivations | Historical, cultural, religious places and shopping |
| Preferred Season for International Travels | Public holidays and school breaks (November-December, February-March, May-July) |



TURKEY IN MALAYSIAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 36,222 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 11.60% |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 16,456 (7.39 %) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 0.12 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 72 travel agencies/ tour operators |
| Preferred Holiday type | Historical, cultural, religious places and shopping |
| Most visited destinations | İstanbul, Kapadokya, Bursa, Ankara, Konya, Pamukkale, İzmir ve Çanakkale. |



AUSTRALIA

| | |
|---------------------------------------|--|
| Population | 22,620,600 |
| Tourism Authority | Ministry of Tourism Australia |
| International Travels | 6,737 million |
| Preferred Foreign Destinations | New Zealand, US, England, Thailand, China, Indonesia, Singapore, Hong Kong, and Japan |



AUSTRALIA

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 15-20 days |
| Target Age Groups | 25-44 ages |
| Time for Decision Making | Before 2 and 3 months |
| Reservation Time | Last minute |
| Preferred Reservation Type | Tourism agency and private |
| Preferred Accommodation Type | Hotel |
| Travel Motivations | Historical, cultural, trekking, climbing, alternative tourism varieties and shopping |
| Preferred Season for International Travels | School breaks (March, April and May-August) |



AUSTRALIA

TURKEY IN AUSTRALIAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 156,009 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 18.47 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 43,279 (1.66 %) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 0.50 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 90 travel agencies/operators |
| Preferred Holiday type | Historical, cultural, trekking, climbing, alternative tourism varieties and shopping |
| Most visited destinations | İstanbul, Kapadokya, Antalya, Mugla Ankara, Pamukkale, İzmir ve Çanakkale |



INDONESIA

| | |
|---------------------------------------|---|
| Population | 242,325,638 |
| Tourism Authority | Ministry of Tourism and Economy Indonesia |
| International Travels | 8,807 million |
| Preferred Foreign Destinations | Thailand, China, Singapore, Hong Kong, Australia, Kuwait, Saudi Arabia and South Korea |



INDONESIA

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 2-3 weeks |
| Target Age Groups | 25-54 ages |
| Time for Decision Making | Before 1 and 2 months |
| Reservation Time | Last Minute |
| Preferred Reservation Type | Tourism Agency |
| Preferred Accommodation Type | Hotel |
| Travel Motivations | Historical, cultural, religious places and shopping |
| Preferred Season for International Travels | Public holidays and school breaks (November-December, February-March, May-July) |



TURKEY IN INDONESIAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 40,282 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 65.44 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 21,212 (79.46 %) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 0.13 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 65 travel agencies/tour operators |
| Preferred Holiday type | Historical, cultural, religious places and shopping |
| Most visited destinations | İstanbul, Kapadokya, Bursa, Ankara, Konya, Pamukkale, İzmir ve Çanakkale |



SINGAPORE

| | |
|---------------------------------------|---|
| Population | 5,183,700 |
| Tourism Authority | Ministry of Tourism Singapore |
| International Travels | 16,933 million |
| Preferred Foreign Destinations | Malaysia, Thailand, China, Indonesia, Hong Kong, Australia, US, Taiwan and South Korea |



SINGAPORE

TOURIST PROFILE

| | |
|---|--|
| Length of stay | 12-18 days |
| Target Age Groups | 25-54 ages |
| Time for Decision Making | Before 3 and 4 months |
| Reservation Time | 3 months early |
| Preferred Reservation Type | Travel Agency |
| Preferred Accommodation Type | Hotel |
| Travel Motivations | Historical, cultural, religious places and shopping |
| Preferred Season for International Travels | School breaks (November-December, May-July) |



SINGAPORE

TURKEY IN SINGAPOREAN MARKET

| | |
|---|--|
| Incoming Tourists to Turkey | 20,957 |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 10.9 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 7,499 (18,98%) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 0.07 |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | 50 travel agencies/ tour operators |
| Preferred Holiday type | Historical, cultural, religious places and shopping |
| Most visited destinations | İstanbul, Kapadokya, Bursa, Pamukkale, İzmir ve Çanakkale |



INDIA

| | |
|---------------------------------------|---|
| Population | 1.22 Billion |
| Tourism Authority | Ministry of Tourism |
| International Travels | 12.5 Million (2010) 14.2 Million (estimated for 2011) |
| Preferred Foreign Destinations | Singapore, Malaysia, Thailand, Hong Kong & Macau, Switzerland, England, Germany , Netherlands , France , Spain , Italy , US, Australia, Dubai, Canada. |



**Turkey**



INDIA

TOURIST PROFILE

| | |
|---|---|
| Length of stay | 5-7 days |
| Target Age Groups | 30-65 Age |
| Time for Decision Making | 1 week to 1 month before departure |
| Reservation Time | 1 week to 1 month before departure |
| Preferred Reservation Type | Travel Agents and Online |
| Preferred Accommodation Type | 4-5 star hotels |
| Travel Motivations | Exploring new cultures, visiting popular/expensive destinations (as a status symbol) |
| Preferred Season for International Travels | May-June, Sep-Oct, End of December |



TURKEY IN INDIAN MARKET

| | |
|---|---|
| Incoming Tourists to Turkey | 73,731 (2011) |
| Change Percentages in Number of Incoming Tourists to Turkey 2011/2010 | 16.28 % |
| Arrivals to Turkey in the First 5 Months of 2012 and Change Percentages | 31,255 (12.69%) |
| Rank and Market Share at the Total Arrivals to Turkey(2011) | 51st, 0,23 % |
| Number of Travel Agencies and Tour Operators Making Operations to Turkey | Approximately 400 |
| Preferred Holiday type | Leisure, History Culture, MICE, Shopping, Honeymoon, |
| Most visited destinations | Istanbul, Antalya, Izmir, Cappadocia |



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