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March, 2014





**Combination of
contemporary and
traditional...**



STORY OF DEVELOPMENT/ TURKEY TOURISM INDUSTRY

MINISTRY OF CULTURE AND TOURISM
General Directorate of Investment and Establishments

DEVELOPMENT OF TURKISH TOURISM SECTOR

1st PERIOD (1963-1982)

- **INDULGE IN PIONEERING PROJECTS FOR TOURISM DEVELOPMENT (SOUTH ANTALYA TOURISM DEVELOPMENT PROJECT, SIDE ETC.)**
- **STANDARDIZATION OF TOURISM ESTABLISHMENTS**
- **CERTIFICATION OF ACCOMODATION AND DAILY CATERING FACILITIES**

DEVELOPMENT OF TURKISH TOURISM SECTOR

2nd PERIOD (1982-2003)

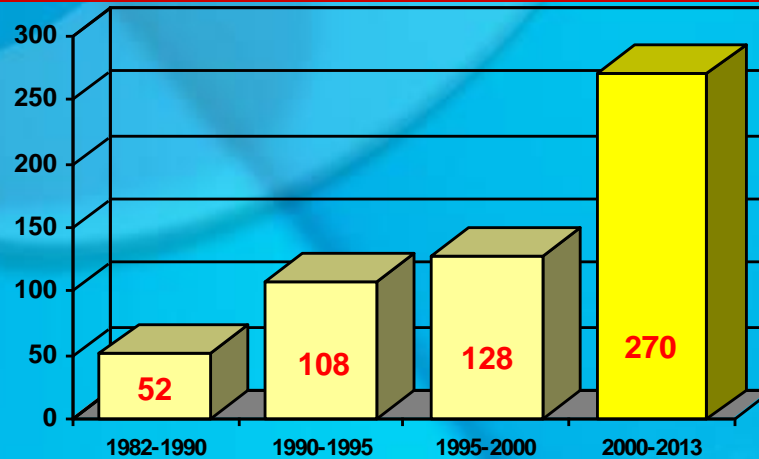
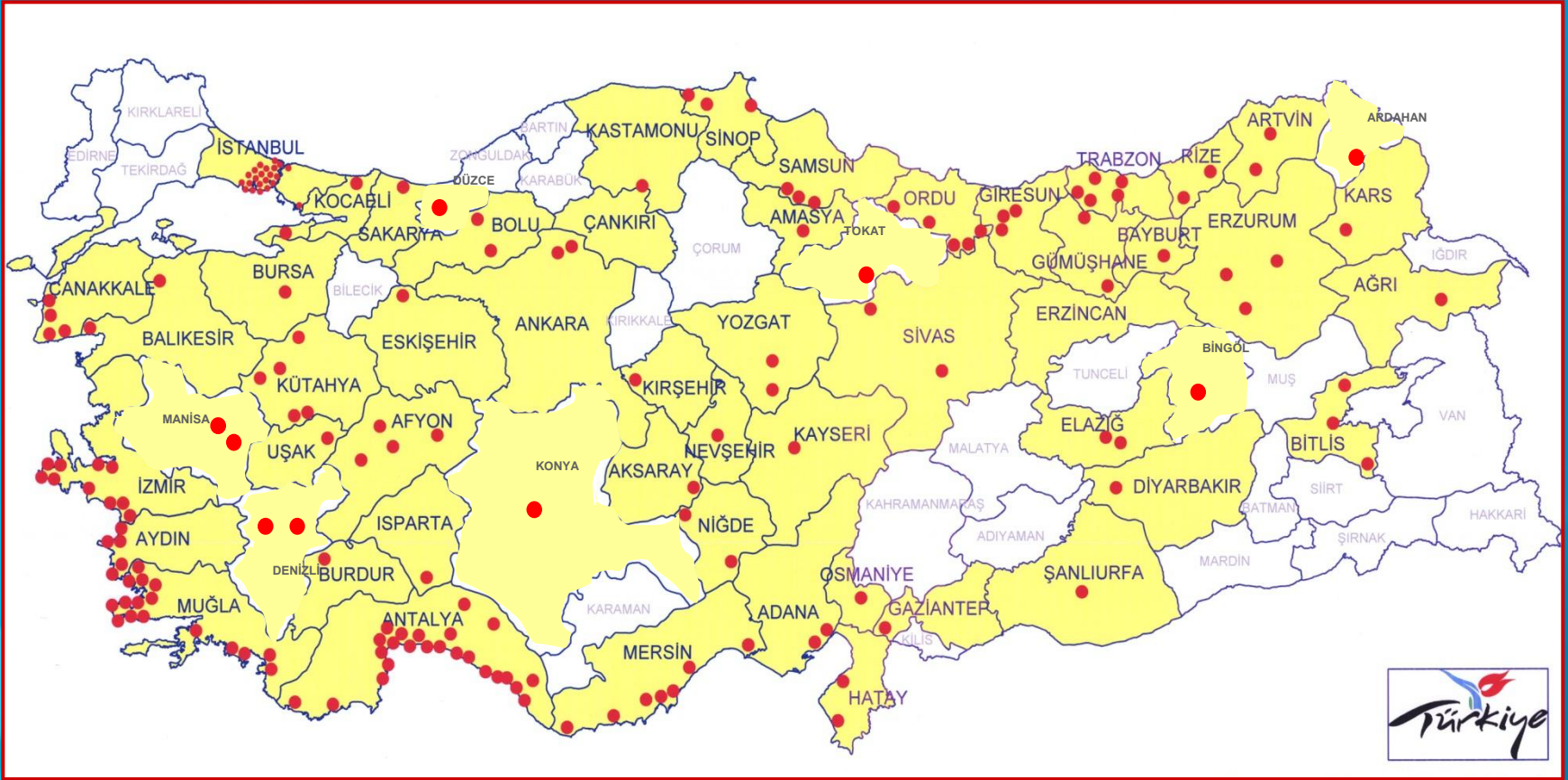
- **TOURISM ENCOURAGEMENT LAW #2634**
- **AUTHORIZATION IN TOURISM LAND USE PLANNING ONLY FOR 1/1000 IMPLEMENTATION PLAN**
- **DECLARATION OF TOURISM ZONES (TOURISM CENTERS)**
- **ALLOCATION OF PUBLIC LAND TO TOURISM INVESTORS**
- **INFRASTRUCTURE INVESTMENTS**
- **DIVERSIFICATION , STANDARDIZATION AND CONTROL OF TOURISTIC ESTABLISHMENTS**
- **EDUCATING QUALIFIED TOURISM STAFF**

DEVELOPMENT OF TURKISH TOURISM SECTOR

3rd PERIOD (2003-)

- **AMENDMENTS IN TOURISM ENCOURAGEMENT LAW**
- **AUTHORIZATION IN TOURISM PLANNING INCLUDING ALL SCALES 1/25.000, 1/5000 & 1/1000**
- **DIVERSIFICATION OF TOURISM PRODUCTS (GOLF, THERMAL...)**
- **DEFINING NEW INVESTMENT AREAS IN FAVOR OF DIVERSIFIED TOURISM ACTIVITIES**
- **BRAND CREATION**
- **ECOLOGICAL AND ECONOMIC PRODUCTIVITY**
- **SUSTAINABLE TOURISM**

DECLARED AREAS FOR TOURISM



TOURISM ENCOURAGEMENT LAW (1982)

- **PLANNING + LAND ALLOCATION**
- Allocation of state owned lands to private investors



TOP TOURISM DESTINATIONS

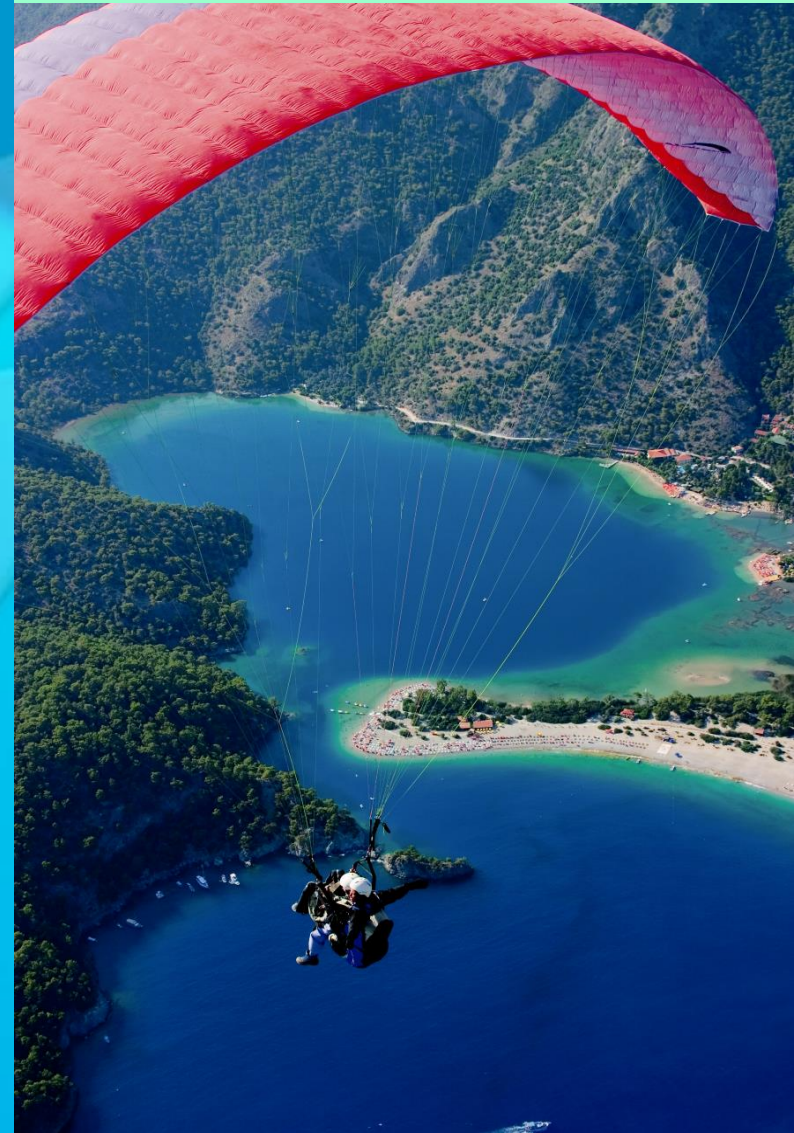
MEDITERRANEAN



ANTALYA - BELEK

Antalya – Belek voted the
“Best Golf Destination in Europe 2008” by
the IAGTO
(International Association of Golf Tour
Operators)

FETHIYE



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TURKEY TOURISM STRATEGY

KÜLTÜR VE TURİZM BAKANLIĞI • 2006

TURKEY TOURISM STRATEGY (2023) OBJECTIVES

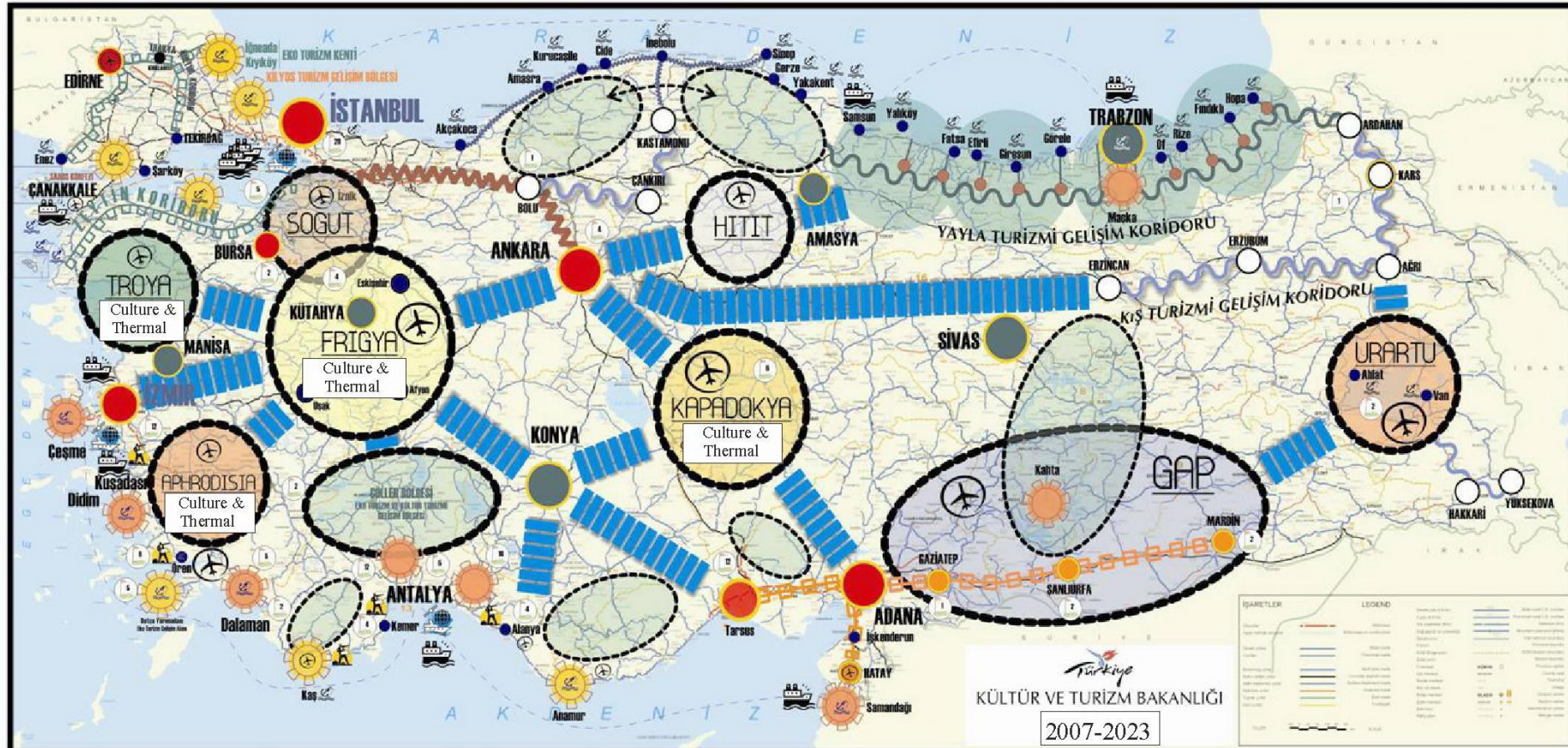
- **To ensure sustainable development of tourism,**
- **To diversify tourism facilities and spread these facilities over all regions, make 12 months tourism**
- **To be at one of the top five tourism destinations of the world in 2023.**
- **65 million visitors + 50 billion revenue in 2023**

GOALS

- To be among the **5 top** countries in the world
- To **increase expenditure** per visitor
- Regional **balanced** development
- Spread tourism into **12 months**
- Establishment of **National Tourism Council** public+private sectors cooperation
- Increase number of **cultural** tours and visitors
- Expand **alternative tourism** potential (golfing, MICE, ecological and health tourism)
- To be the **1st destination** in health tourism in EU
- To bring Turkey and Istanbul among the **top 10** countries in the world in **MICE tourism**
- To realise **100 golf courses** by the year 2020



TOURISM STRATEGY OF TURKEY CONCEPTUAL ACTION PLAN



LEGEND

The Focus of Development

Existing Tourism Cities	Winter Sport	City Tourism	Thematic Development	Plateau Tourism Development
Proposal Tourism Cities	Marina	Culture and Religious	Ecological Development	

The Links of Development

Silk Road	Religious and Gourmet Tourism	Function Links	Plateau Tourism Route
Winter Tourism Route	Sea Transport Route	Olive And Culture Route	West Black Sea Tourism Route

Transport and Other...

	Airport		Marina
	Cruise Port		Marinas Transformed From Fishing Shelter
	Mega Yatch		Marinas Transformed From Fishing Shelter
			Re-evaluated Tourism Potential Areas

TOURISM DIVERSITY IN TURKEY



HEALTH AND THERMAL TOURISM



GOLF TOURISM



YACHT TOURISM



CULTURE TOURISM



WINTER SPORTS



HEALTH AND THERMAL TOURISM IN TURKEY

HEALTH TOURISM

- **Medical Tourism** (Eye, dentistry, aesthetic, cardiovascular surgery, prosthesis etc. treatments)
- **Thermal Tourism** (Cure treatment, Spa&Wellness, aquatherapy etc.)
- **Elderly Care Tourism** (Elderly resorts and home caring type hotel facilities etc.)





POTENTIAL OF GEOTHERMAL RESOURCES IN TURKEY



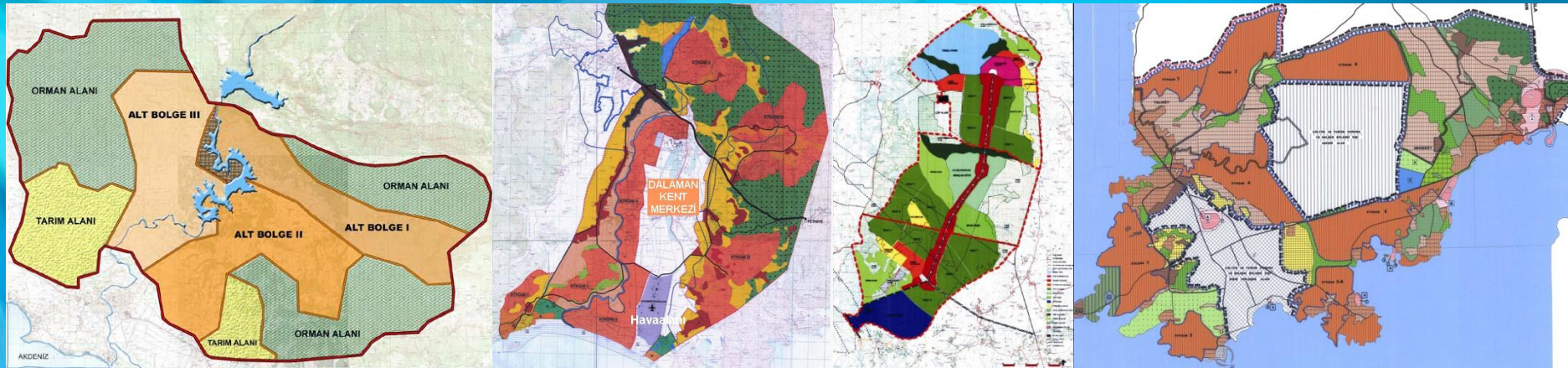
POTENTIAL OF THERMAL TOURISM IN TURKEY

- There are approximately 1300 geothermal resources with water flow rates between 2 - 500 liter/second in Turkey.
- Turkey is among the first seven countries in the World for its potential hot mineral resources.
- Turkey is the third country in Europe with 240 thermal spas having hot mineral springs. Comes after Italy(300 spas) and Germany(with 260 spas).
- 64 of these thermal springs are declared as Thermal Tourism Centers, 4 of them is Culture and Tourism Conservation and Development Regions.

NEW VISION FOR THERMAL TOURISM INVESTMENTS:

THERMAL TOURISM CITIES

Priority zones are aimed to be developed as a thermal tourism destination and these thermal tourism-oriented destinations will be integrated with other tourism potentials such as golf, winter sports, culture, nature, water sports, etc nearby. 12 months tourism will be possible at the destinations.

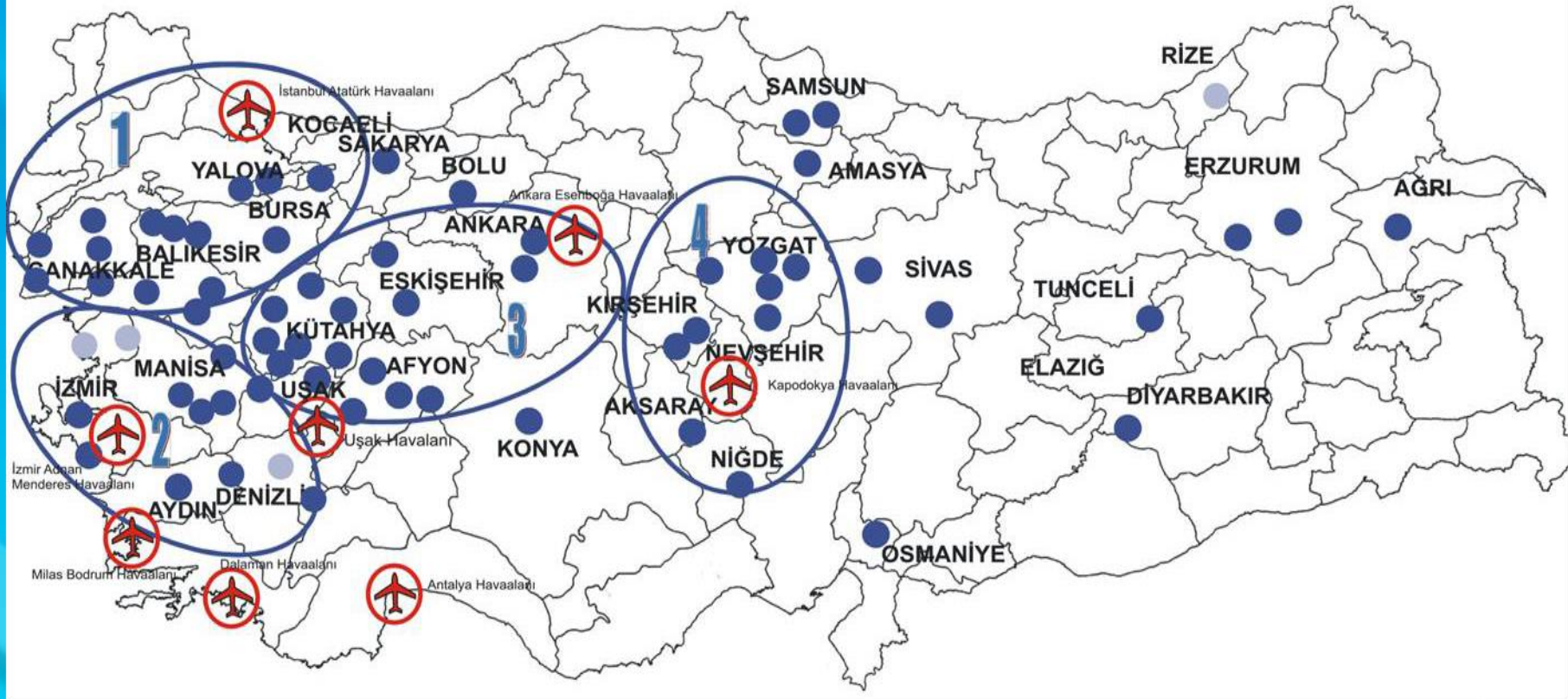


'MODERN' AND 'QUALIFIED' THERMAL TOURISM FACILITIES

THERMAL + CURE CENTER + CURE PARK
HOTEL (treatment + therapy) (recreation/relaxation/entertainment)



THERMAL TOURISM CENTERS



Regions of Thermal Tourism Master Plan

- 1 South Marmara:** Balıkesir, Çanakkale, Yalova
- 2 South Aegean:** Aydın, Denizli, İzmir, Manisa
- 3 Phrygia:** Afyonkarahisar, Ankara, Eskişehir, Kütahya, Uşak
- 4 Middle Anatolian:** Aksaray, Kırşehir, Nevşehir, Niğde, Yozgat

TARGETS OF THERMAL TOURISM

SHORT TERM : 50.000 BEDS

MIDDLE TERM : 200.000 BEDS

LONG TERM : 500.000 BEDS

***TO BECOME WORLD'S TOP THERMAL
TUORISM DESTINATION***

Thermal Facilities in TURKEY

Thermal Tourism Establishments	2006		2010		2013**	
	NUMBER OF FACILITY	NUMBER OF BEDS	NUMBER OF FACILITY	NUMBER OF BEDS	NUMBER OF FACILITY	NUMBER OF BEDS
TOURISM OPERATION LICENSE	37	9.736	50	15.796	74	22.326
TOURISM INVESTMENT LICENSE	8	2.438	15	7.757	31	13.998
LICENSED BY MUNICIPALITY	33	5.593	35	6.174	43	6.033
TOTAL	78	17.767	100	29.727	148	42.357

Source: Ministry of Culture and Tourism (15.11.2013)

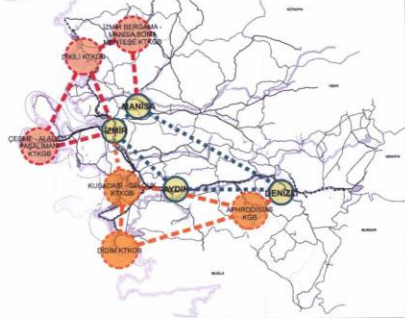
**Temporary data

YALOVA THERMAL TOURISM CENTER

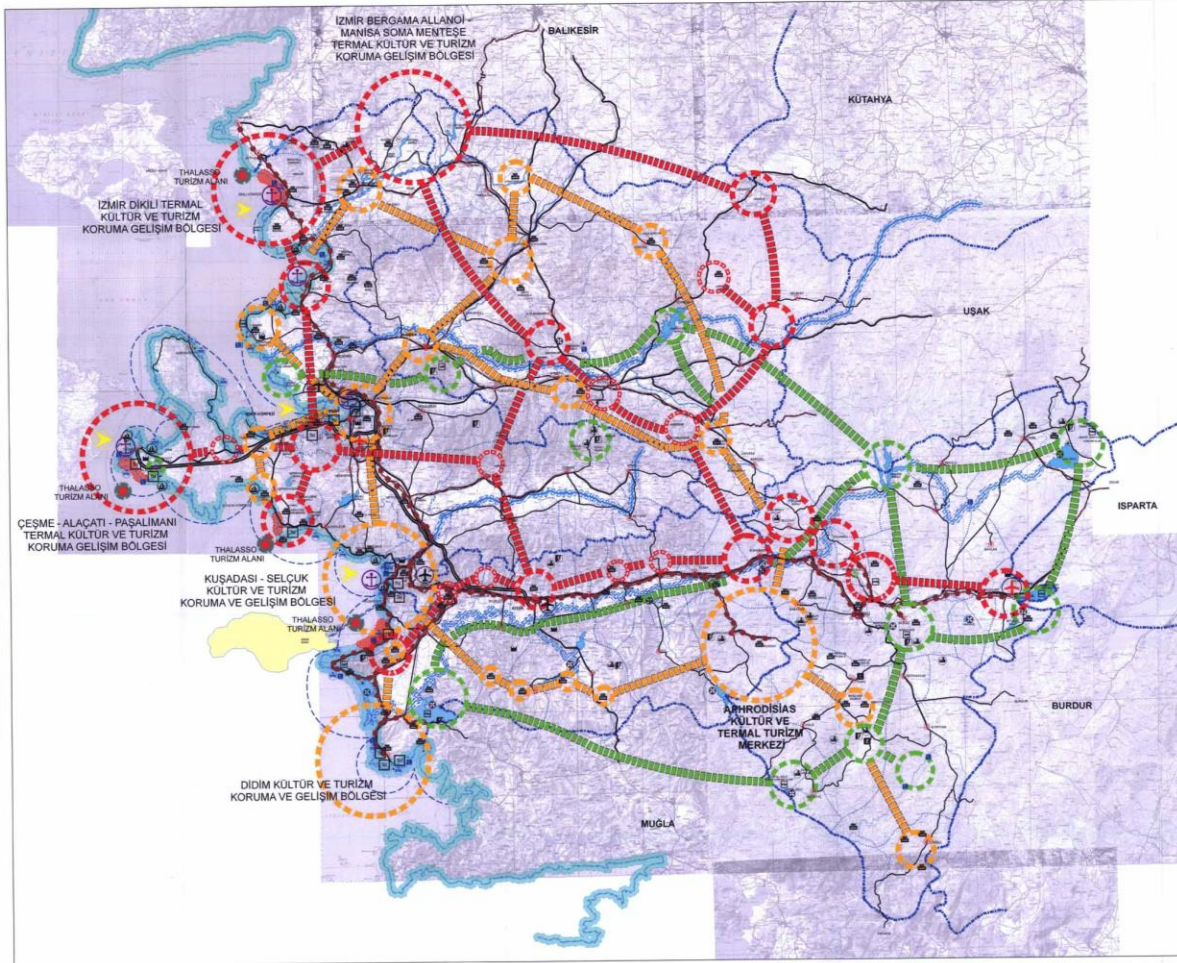


SOUTH AGEAN THERMAL TOURISM MASTER PLAN

BÖLGE MASTER PLAN KAVRAMSAL ŞEMA



BÖLGE MASTER PLAN ULAŞIM ŞEMASI



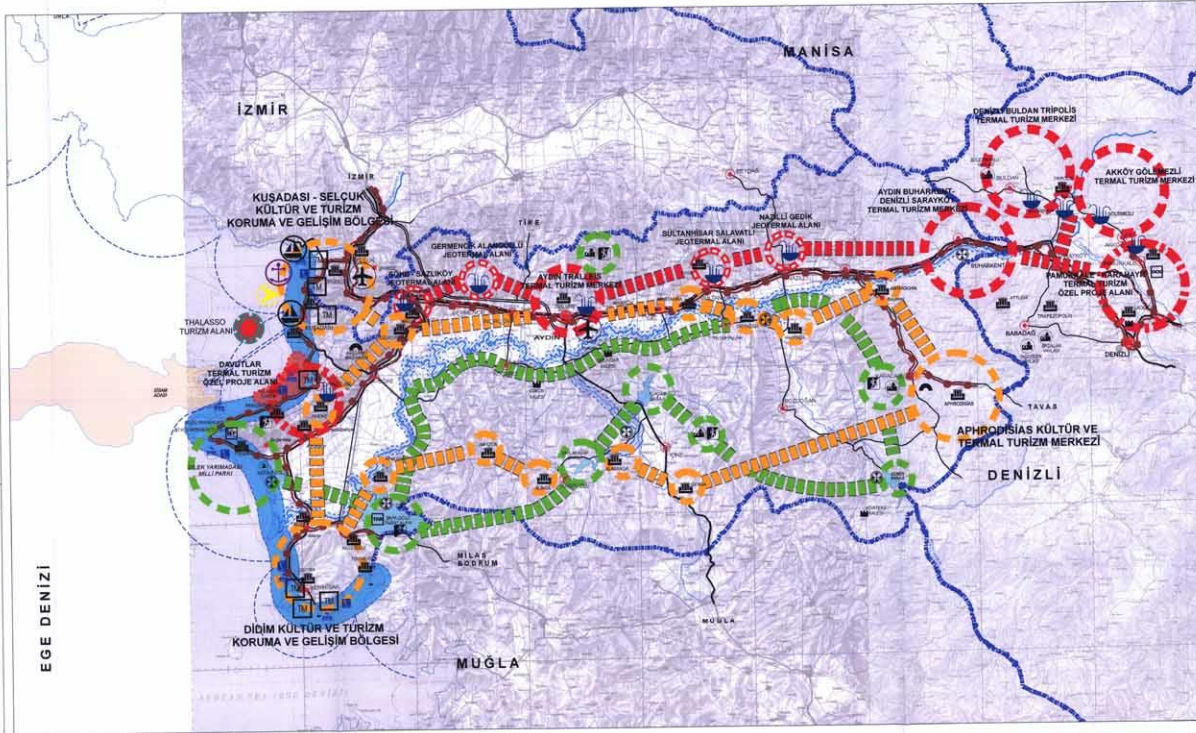
GÜNEY EGE THERMAL TURİZM
BÖLGE MASTER PLANI -
PLAN ÖNERİLERİ

GÖSTERİM

- Yollar**
 - Denizyolu
 - Karayolu
 - 8 Yolu
 - Otoyol
 - Denizyolu
- Tur Gözergahi**
 - 1. Kademe Havaalanı
 - 2. Kademe Havaalanı
 - 3. Kademe Havaalanı
 - Liman
 - Yat Limanı
- Osak Noktaları**
 - Termal Turizm Kenti
 - Termal Turizm Özel Proje Alanı
 - Jeotermal Kaynak Alanı
 - Turizm Odakları
 - Doğa Turizmi Odakları
 - Thalasso Turizm Odakları
- Turistik Kullanımlar**
 - Turizm Merkezleri
 - Antik Kent
 - Köy Turizmi
 - Doğa Sporları
 - Yayla Turizmi
 - Kayaklı Su Kaynaklarına Dayalı Rekreatif Turizm
 - Su Sporları
 - Pilaj
 - Dünya Mirası
 - Rekreatif
 - Kaleler
 - Mağaralar
 - Mavi Bayrak
 - Sınır Kapısı
 - Thalasso Turizm Alanı
- Milli Parklar**
 - Milli Park
 - Tabiat Koruma Alanı
 - Ornitolojik Turizmi (Sulak Alanları)
 - Özel Çevre Koruma Alanı
 - Kıyı Turizm Alanı
 - Nehir Rekreatif Kuşağı

ÖLÇEK 1:500.000

The figure consists of two maps of the study area in the Taurus mountains. The top map shows the location of the study area within the Taurus mountain range, highlighting the study area in red and the study area in blue. The bottom map shows the location of the study area within the Taurus mountain range, highlighting the study area in red and the study area in blue.



- Turizm Merkezleri
- Artık Kent
- Doğa Sporları
- Yayla Turizmi
- Kayaklı Su Kaynaklarına Dayalı Rekreasyon Turizmi
- Su Sporları
- Plaj
- Rekreasyon
- Kaleler
- Mağaralar
- Mavi Bayrak
- Thalasso Turizm Alanı
- Sınır Kapısı

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Turkish Bath



Çaylaklı Hamamı



YALOVA THERMAL TOURISM CENTER



İZMİR BALÇOVA THERMAL TOURISM CENTER



FOR MORE INFORMATION PLEASE CONTACT WITH:
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Thank you...

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