

TURKEY IN TARGET MARKETS

AND

TRAVEL SATISFACTION

GERMANY

Turkey's Image: In the German market, Turkey has a positive image as a tourism destination with its beaches, high-quality services and hospitality. Furthermore, Turkey is perceived as an affordable travel destination.

According to a poll by Institut für Freizeitwirtschaft in Germany about the "Image of the visited countries", Turkey is ranked at top of the list thanks to her service quality and sympathetic attitude towards children.

Components of Satisfaction:

- ❖ Sea, Sun, Beach
- ❖ Long tourism season
- ❖ Cost/service balance
- ❖ High quality hotels
- ❖ Cultural diversity

Resource: Turkish Culture Office in Berlin, Turkish Culture Office in Frankfurt, TouristScope/TUI, GfK- TravelScope and DRV(German Tour Operators and Travel Agencies Association)

RUSSIAN FEDERATION

Turkey's Image: Turkey's image in Russian Federation is that she is "the most popular and preferred holiday destination." According to a poll, 47 % of the Russians think of Turkey as the most appropriate travel destination. With her affordable prices, high quality accommodation, original history and cultural values, Turkey is considered as a modern tourism destination.

The first county which comes to mind when you think of holiday in Russian Federation is Turkey. Recently, Russian tourists have been interested in other destinations of our

country than the line between Antalya and Bodrum. Thus, Turkey, which has become a well-known brand in Russian Federation market, has been keeping its place as the number 1 destination.

Connotations associated with Turkey are: “a sunny place (37,8%), enjoyable(27,7%), picturesque (21,2%), amicable (19,6%), relaxing (18,2%), a land of contrasts (17,8%), Mediterranean (15,8%) and unique (14,9%)”.

In this survey, 48 % of those questioned said that they visited Turkey before and tend to visit again. 30% states that they have never been to Turkey but would like to visit.

Components of Satisfaction: 59.4 % of the visitors stated that they were absolutely pleased with their holidays. 7% of the visitors were not very pleased with their vacations.

- ❖ Hotel quality
- ❖ Service quality
- ❖ Hot climate
- ❖ Natural beauties
- ❖ Visa convenience
- ❖ Entertainment opportunities
- ❖ Fair price

Resource: Turkish Culture and Tourist Office in Moscow "Turkish Tourism Market Survey"

GREAT BRITAIN

Turkey's Image: The general view on Turkey is that she is a sunspot, culturally rich place. The image of Turkey is positive for the British in general and she is defined as “sunny” (68%), “historical” (55%) and “cultural” (48%)

The image of Turkey is positive for the British who have visited Turkey in recent years and for those who haven't visited Turkey yet but plans to do so. 7 people out of 10 see Turkey as “sunny” and one in two sees as “historical/cultural”

Most of the holidays spent in Turkey are seaside holidays. Cultural/historical tours come second. 8 people out of 10 visit historical places and museums during their stay.

One third of the British have stated that they have already visited Turkey. The number of those who have visited Turkey in last two years is almost equal to those who have visited earlier. The other one third has never been to Turkey, but she is among the countries they would like to visit.

Components of Satisfaction: Hot climate, historical and cultural values, fair price, natural values, Turkish hospitality, family friendly, accommodation facilities.

Those who have already visited Turkey were asked to evaluate their holiday and 76% have stated that their holidays were better than expected at least in one aspect. Moreover, seven out of ten have stated that they liked their last visit to Turkey and ranked their trips as 1. or 2. from 1 to 5 range (1 is the best point).

Those who have visited Turkey in recent years have positive views on Turkey and the key aspects of their holidays. Most of them have stated that accommodation facility standards are better compared to their earlier visits. Almost one in two says so. In addition, four out of ten who visited Turkey more than once have stated that there is an improvement in varieties of trips and facilities.

Resource: Mintel Consultancy "Turkey in United Kingdom Market 2011" Research

NETHERLANDS

Turkey's Image: Turkey is perceived by 63% of Dutch visitors as a sunny country with a good climate, nice beaches (21%), nice sea (20%), delicious food and drinks (14%) and friendly Turks (10%).

The Dutch find Turkey hospitable, unique and a traditional country. While Dutch who visited Turkey view it as luxurious, safe and tolerant, those who have never been visited Turkey think just the opposite. There are negative views among those who have never been to Turkey.

In addition, Turkey has an established view of an "all inclusive cheap destination" in Dutch market.

Components of Satisfaction: 92% of Dutch visitors were pleased with their trips and they advised Turkey to their friends.

- ❖ Fair price options
- ❖ Sea and beach
- ❖ Nice weather
- ❖ Cultural richness
- ❖ Turkish cuisine
- ❖ Health trips and family holiday chances.

Resource: NBTC-NIPO “Turkey as Tourism Country in Dutch Market) Research

FRANCE

Turkey’s Image: In general, Turkey has a positive image on tourism. However, due to misinformation and lack of knowledge, Turkey is known as an Arabic country by the French who have never visited it, which overshadows the attractiveness of natural and cultural varieties of our country.

Components of Satisfaction: Service quality, cultural diversity

Resource: Turkish Culture and Tourist Office in Paris

U.S.A

Turkey’s Image: Turkey is viewed as a tourism destination standing out with “its historical, cultural, archeological and natural richness” as a result of all kinds of promotional activities for long years. According to a survey conducted to a selected target group of Americans among 8 million who have a habit of travelling overseas, 50% want to visit Turkey. 22.6% of this target group has stated that they “want very much to visit or revisit Turkey” 24.4% of the group have stated that they can see it as an option to visit Turkey.

Components of Satisfaction:

- ❖ Natural beauties, historical and cultural richness: Turkey has a variety of historical, cultural and archeological richness as well as natural beauties. In addition, Turkey has 9 destinations inscribed in UNESCO’s World Heritage List.

- ❖ Religious: St. Paul lived in Turkey and the seven churches are in the Aegean Region, Turkey.
- ❖ Turkish Hospitality: American tourists focus on tourism types which enable them to contact with local people and experience the destinations they visit. In this respect, Turkish hospitality is a strengthening factor for American tourists.
- ❖ Cruising: 60 % of American tourists travelling the first time to Turkey prefer cruising. It is an advantage for Turkey that cruise ships which are preferred by high-income American tourists mostly aged 55 and above as safe and comfortable travels drop by Turkish harbors.
- ❖ Economical Factors: USD is very strong in Turkey and it enables advantage in price and quality outside the Euro region.

Resource: Turkish Culture and Tourist Office in New York, Menlo Consulting Group "USA Market Report"

UKRAINE

Turkey's Image: Turkey is generally known as a fun destination for summer vacations. Additionally, it is viewed as a country of contrasts besides being friendly, suitable for family vacations and comfortable with a price/quality balance.

Entertainment, sea, beach, cultural trips, all inclusive services are mostly associated with Turkey.

Components of Satisfaction: Most of Ukrainian visitors plan to revisit the country. Satisfied Ukrainian tourists emphasize high quality service, comfort and Turkey's openness as a holiday destination.

Ukrainian tourists think that in Turkey everyone can find something to do.

- ❖ Easy visa procedures
- ❖ Comfort
- ❖ Service quality
- ❖ Developed infrastructure of hotels (animation and entertainment services for children)

- ❖ SPA, Turkish bath, fitness, other sports facilities
- ❖ Fair price
- ❖ Natural beauties (shores)
- ❖ Thermal resources
- ❖ Shopping opportunities
- ❖ Turkish hospitality

Resource: Pravda Research "Turkey's Image in Ukraine Market" Research

AUSTRIA

Turkey's Image: Turkey has a positive image in Austria and comes second on the list of most liked countries following Italy. According to them, Turkey is a traditional beach holiday destination and has a rich culture. At the same time, 86 % of Austrians think of Turkey as a 'sympathetic' holiday destination.

Preferences of tourists according to the type of holiday are as follows:

39% Sea, sand, sun

23% recreation and wellness

21% family vacation

10% fun and adventure (disco, sport activities, action, etc.)

11% mountaineering (nature tour, tracking, etc.)

Preferences of the Australian in planning a vacation are as follows:

45% Those who want to rest and relax on their vacation.

30% Those who want to have more than one vacation in a shorter term.

19% Those who do not take the risk of bad weather, and go abroad to a southern place on vacation.

19% Those who want to know more international cities on their future vacations.

- 12% Those who feel comfortable in holiday villages.
- 8% Those whose vacation in the future will draw attention on activities, and theme parks.
- 7% Sport activities, entertainment.
- 6% Big organizations, concerts.

Components of Satisfaction:

- ❖ Turkish cuisine
- ❖ Turkish hospitality
- ❖ Natural beauties
- ❖ Cultural richness

Resource: Turkish Culture and Tourist Office in Vienna, Temmel, Seywald and Partner Market Research

SWITZERLAND

Turkey's Image: There is a positive view on Turkey in Switzerland in general. It is described as an exciting, interesting, mystic, hospitable tourism country successfully synthesizing modern and historical.

Components of Satisfaction:

- ❖ Turkish hospitality
- ❖ Cultural richness
- ❖ Beautiful beaches
- ❖ Price/quality balance
- ❖ Turkish cuisine
- ❖ Shopping opportunities
- ❖ Nice climate

Resource: Gretz Communications Market Research

SPAIN

Turkey's Image: Turkey has an overall positive image as a travel destination in the Spanish market.

Components of Satisfaction:

- ❖ Fair prices
- ❖ Turkish cuisine
- ❖ Cultural and historical diversity
- ❖ Friendly Turkish people

Resource: Turkish Culture and Tourist Office in Madrid

ITALY

Turkey's Image: Italians have a positive perception on the cultural and historical richness of Turkey.

Components of Satisfaction:

- ❖ Turkish people's friendly attitude
- ❖ Accommodation quality
- ❖ Turkish cuisine
- ❖ Historical and cultural beauties
- ❖ Climate
- ❖ Archaeological sites / museums / monuments sightseeing opportunities, cultural enrichment
- ❖ Opportunity to combine culture and sea vacation
- ❖ Favorable prices

Moreover, Turkey's tourism product marketing of our country "as the geographic proximity, to hospitality, safe and clean" is thought to be useful to emphasize.

Resource: Turkish Culture and Tourist Office in Rome

BELGIUM

Turkey's Image: Turkey, with its natural beauty, rich historical and cultural aspects, is perceived as a tourist country in Belgium, especially for sea-sand-sun vacation.

Components of Satisfaction:

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|--------------------------------|-------|
| ❖ Natural Beauty | 28.2% |
| ❖ Warmth sun | 27.5% |
| ❖ Family holiday habits | 15.7% |
| ❖ Beauty of the beaches | 14.6% |
| ❖ Interest in changes | 13.4% |
| ❖ Natural Beauty, and calmness | 13.4% |
| ❖ Fair prices | 11.6% |
| ❖ Gastronomy | 7.6% |
| ❖ Shopping | 3.3% |

Resource: WES

DENMARK

Turkey's Image: About 45% of Danes have no information about Turkey. 32% of Danes have positive, 33 % neutral, 13 % negative and 6 % very positive opinion on Turkey. 11% have not disclosed an opinion on Turkey. According to this essentially negative 18% of Danes, 38% is basically a positive image of Turkey.

The last one year, Turkey's image on Danes seems to gain momentum in a positive direction. Among the reasons is Turkey finds a broader place in world politics and its competitive tourism countries, faces a bad outcome.

Components of Satisfaction:

50 % of Danish visitors indicate that they can travel to Turkey one more time. This suggests that the half of Danish visitors left the country with positive impressions. One in every six Danes suggests Turkey as a travel destination to their friends and families.

Resource: Optimizers "Turkey in Denmark Market" Research

FINLAND

Turkey's Image: When Finns' classical view on holidays based on sea, sand and sun is considered, Turkey has a positive image with its nice climate, coasts, accommodation facilities, golf courses and mountaineering, diving, yachting, sailing and paragliding opportunities. Especially in the last two years the culture, history, and urban tourism has increased interest. Beside the modern face of Istanbul, it has culture and tradition within and is seen as a city break destination.

Components of Satisfaction:

- ❖ Fair Price
- ❖ Shopping opportunities
- ❖ Natural beauty (shores)
- ❖ Entertainment
- ❖ Suitable for family vacation

Resource: Taloustutkimus "Tourism Market in Finland" Research

CHINA

Turkey's Image: Turkey has a positive image as a bridge between Asia and Europe and with her cultural diversity.

Components of Satisfaction:

- ❖ A country with different cultures and rich history
- ❖ According to Europe price / cost advantages
- ❖ Turkish hospitality
- ❖ Suitable climate
- ❖ Turkish cuisine
- ❖ Shopping opportunities

Resource: Turkish Culture and Tourist Office in Beijing

JAPAN

Turkey's Image: With her historical, cultural and natural richness, Turkey has a positive image on Japanese people who are interested in cultural tourism. Japanese activities in 2010 in Turkey played an important role in bringing the two societies closer and Turkey is perceived as a warm and friendly country.

Components of Satisfaction: 95 % of Japanese visitors are pleased with visit to Turkey.

- ❖ Lifestyle and cultural diversity
- ❖ Friendly behavior of people
- ❖ Accommodations' quality
- ❖ Quality of guidance
- ❖ The charm of Istanbul and Cappadocia
- ❖ Turkish cuisine
- ❖ Fair price
- ❖ Climate
- ❖ Convenient public transportation

In addition, according to information received from some tour operators and travel agents who have a significant market share in Japan, most tourists (90%) that visited Turkey were happy with their holidays.

Resource: Commons "Market Research in Japan"

SOUTH KOREA

Turkey's Image: According to the South Korean tourists Turkey, for its historical and cultural country, has the image (due to their common past) as the brother country.

Components of Satisfaction: South Korean tourists who visited Turkey largely remained satisfied with their journey.

- Its rich history
- Religious significance (especially Christianity)
- Turkish cuisine
- Brother country
- The beauty of nature

Resource: Tokyo, Culture and Tourism Counselor

UNITED ARAB EMIRATES

Turkey's Image: Turkey comes first to mind as a holiday destination in the UAE market share, which is increasing 24% every year. According to the survey, Turkey is positively associated with the following attributes: exciting, green, historical, attractive, family destination, the land of contrasts, sunny, Muslim, friendly, safe, and European. Turkey, other than any perceptions, is seen as the most popular tourist destinations. Besides this, Turkey's expensive image perception has taken place by reasonably price image.

Components of Satisfaction: 96% of tourists who visited Turkey remained satisfied with their journey. 76% of those who visited Turkey said that they want to visit again. According to survey results, 25% of participants did not go to Turkey, but Turkey is in the first place among the countries they want to visit.

- ❖ Accommodation quality and modern entertainment facilities
- ❖ Variety of activities
- ❖ Turkish cuisine
- ❖ Clean environment and clean hotels
- ❖ Modern entertainment facilities.
- ❖ Ease of travel within the country
- ❖ Turkish hospitality

Resource: Vision Way Research & Consultancy "Turkey in UAE Market" research, Medium Rare Advertising "Market Report"