PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT & FINANCE OFFICE**

# TOURISM SECTOR IN TÜRKİYE

**INVEST**.GOV.TR

# AGENDA

1. Executive Summary
2. Tourism Sector in the World and Türkiye`s Position
3. Tourism Sector in Türkiye

# EXECUTIVE SUMMARY

1

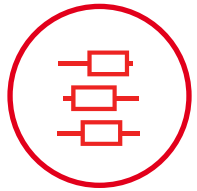
# EXECUTIVE SUMMARY

**FAVORABLE INVESTMENT ENVIRONMENT**

- Türkiye was 4th most visited country in the World with 60.6 million visitors (international tourist arrivals) in 2024
- Türkiye ranked 7th in the World with USD 56.3 billion tourism receipts in 2024
- Türkiye ranked 3rd in the World with 577 blue flag awarded beaches in 2024
- Year-round tourism
- Proximity to major markets and connectivity
- Türkiye has a wide range of tourism source markets, protecting it from asymmetrical shocks

**STRONG INTERNATIONAL PRESENCE**

- Prestigious global hospitality brands have presence in Türkiye
- Successful partnerships with local companies to grow in the region, capitalizing on locals' experience and networks
- Türkiye is geographically well situated to attract arrivals from Western and Eastern Europe as well as the MENA and Asia region.



**ROBUST GROWTH IN THE SECTOR**

- 62,3 Million visitors in 2024, 10% increase comparing with 2023.
- In 2024, tourism revenue of Türkiye reached 61.1 billion USD by increasing 8.3% compared to 2023
- In 2025, target is 65 million visitors with 64 billion USD revenue.
- Contribution of Travel & Tourism to GDP in 2024 was 13%
- More than 3,2 Million - Employment in tourism sector in 2024 which was more than 10% of total employment in Türkiye

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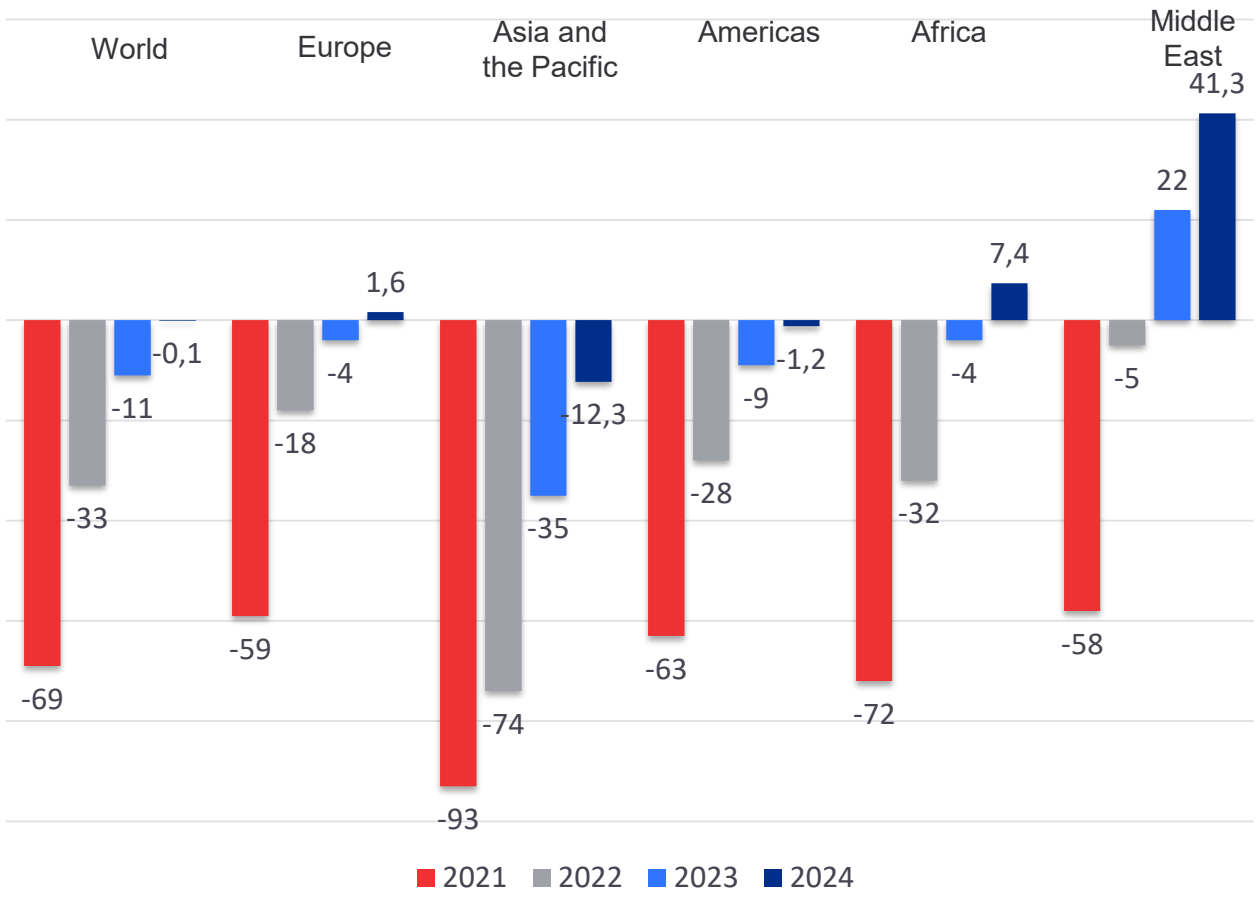
# TOURISM SECTOR IN THE WORLD AND TÜRKİYE`S POSITION

2

# TOURISM SECTOR IN THE WORLD AND TÜRKİYE`S POSITION

## INTERNATIONAL TOURIST ARRIVALS BY REGION, ANNUAL % CHANGE over 2019




Source: UNWTO World Tourism Barometer May 2025

- In 2024, international arrivals (overnight visitors) reached 99,9% of 2019 levels, indicating an almost complete recovery to pre-pandemic numbers.
- The Middle East experienced the strongest relative growth, with international arrivals surpassing pre-pandemic levels by 41,3% in 2024.
- Europe also exceeded pre-pandemic levels for the first time with a 1,6% increase from Q1 2019.
- In 2024, arrivals in Asia and the Pacific recovered to 88% of pre-pandemic levels, following a 65% recovery in 2023.
- The combined income from tourism receipts and international passenger transport reached a global peak of USD 2.0 trillion in 2024—up 11% from 2023 and 15% from pre-pandemic 2019, in real terms.

## INTERNATIONAL TOURIST ARRIVALS, DISTRIBUTION BY REGION IN THE WORLD, 2024

| Region | Share (%) | Tourist Arrivals (million) | Change (%) 24/23* | Change (%) 24*/19 |
|---|---|---|---|---|
| Europe | 51.6 | 755.7 | 12.2 | -0.1 |
| Asia and the Pacific | 21.7 | 317.5 | 33,8 | -12.3 |
| Americas | 14.8 | 216.6 | 8.2 | -1.2 |
| Africa | 5 | 73.9 | 13.5 | 7.4 |
| Middle East | 6.9 | 101.2 | 8.3 | 41.3 |
| World | 100 | 1465 | 12.2 | -0.1 |

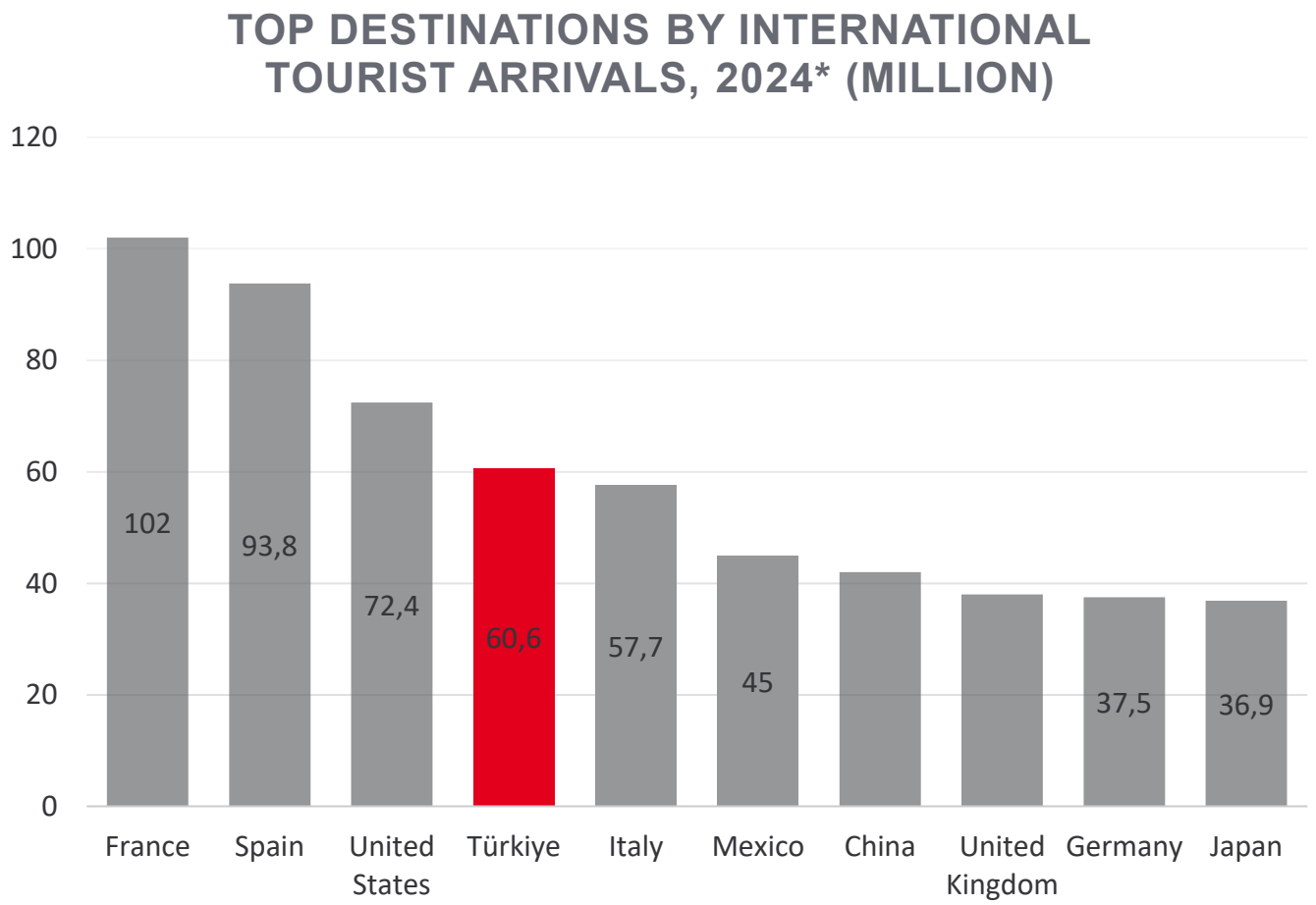
* Provisional Data

Source: UNWTO World Tourism Barometer May 2025

- Europe attracted more than half of total tourists in the world in 2019 with 742.1 million tourist arrivals (50.6%). Asia and the Pacific recorded 360.1 million tourist arrivals (24.5%) while Americas recorded 219.3 million (14.9%), Africa and Middle East recorded around 70 million (4.8%) tourist arrivals in 2019.
- In 2024, Europe attracted 755.7 million tourist arrivals (51.6%). Asia and the Pacific recorded 317.5 million tourist arrivals (21.7%) while Americas recorded 216.6 million (14.8%), Middle East recorded 101.2 million (6.9%) and Africa recorded 73.9 million (6.9%) tourist arrivals.

# TOURISM SECTOR IN THE WORLD AND TÜRKİYE`S POSITION

## TOP DESTINATIONS BY INTERNATIONAL TOURIST ARRIVALS, 2024




* Provisional Data

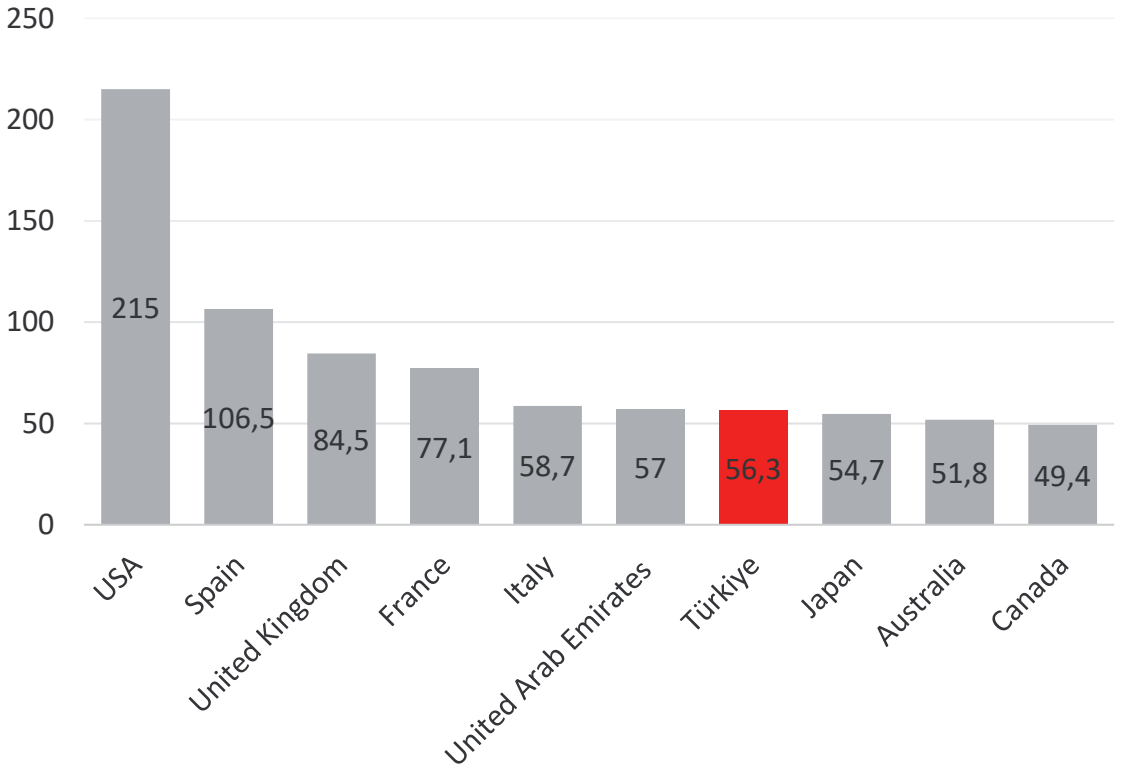
Source: UNWTO World Tourism Barometer May 2024

- France was the most visited country in 2024 with 102 million visitors. Spain came 2nd with 93,8 million visitors. United States recorded 72,4 million tourist arrivals in 2024 ranked as 3rd most visited country.
- Türkiye was the 4th most visited country in the World in 2024. 4.1% of total visitors in the world and 8% of total visitors in Europe with 60,6 million tourist arrivals.
- Mexico ranked 6th,China ranked 7th and United Kingdom ranked 8th. Germany recorded 37,5, Japan recorded 36,9 million arrivals and become 9th and 10th respectively.

# TOURISM SECTOR IN THE WORLD AND TÜRKİYE`S POSITION

## INTERNATIONAL TOURISM RECEIPTS

### INTERNATIONAL TOURISM RECEIPTS, 2024* (USD BILLION)




* Provisional Data
Source: UNWTO World Tourism Barometer May 2025
** data calculated by (total revenue/visitors)
Source UNWTO World Tourism Barometer May 2025

### INTERNATIONAL TOURISM RECEIPTS, 2024** Per Arrival (USD)

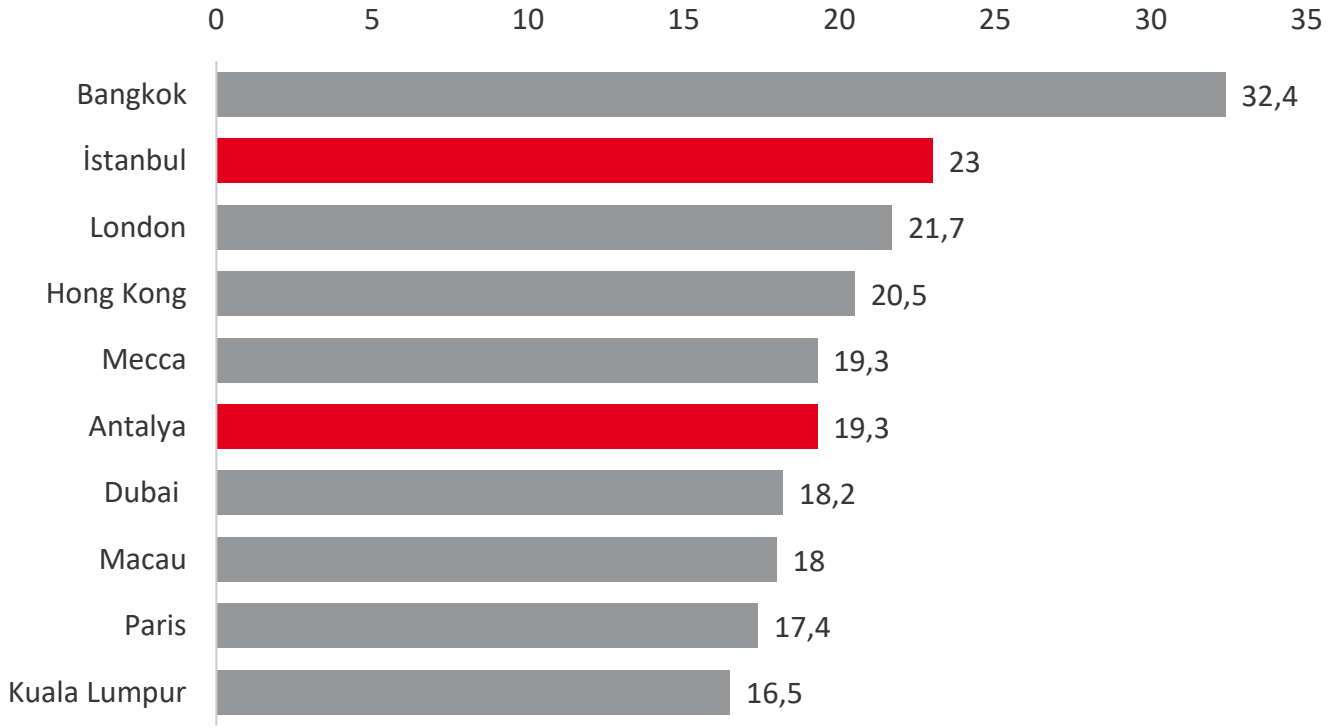
| | | |
|---|---|---|
| 1 | Australia | 6240 |
| 2 | USA | 2970 |
| 3 | Canada | 2482 |
| 4 | UK | ……. |
| 5 | UAE | ……. |
| 6 | Japan | 1482 |
| 7 | Spain | 1135 |
| 8 | Italy | 1017 |
| 9 | Türkiye | 929 |
| 10 | France | 756 |

- Türkiye ranked 7th with USD 56,3 billion tourism revenues in 2024. 14% increase in tourism receipts of Türkiye when compared with previous year.
- Türkiye stood out in Southern Mediterranean Europe with a 7% rise in receipts in Q1 2025, whereas Greece, Italy, and Portugal all recorded 4% growth.
- According to Minister Mehmet Nuri Ersoy, Türkiye's tourism revenue target for 2025 is 64 billion USD, with an expected 65 million visitors.
- Minister Ersoy bases the goal of increasing tourism revenues not merely on boosting visitor numbers, but on raising per capita spending, extending tourism throughout the year, and diversifying tourism products.

# TOURISM SECTOR IN THE WORLD AND TÜRKİYE`S POSITION

## TOP DESTINATIONS BY INTERNATIONAL TOURIST ARRIVALS, 2024

### TOP 10 CITIES IN INTERNATIONAL CITY ARRIVALS, 2024 (MILLION)



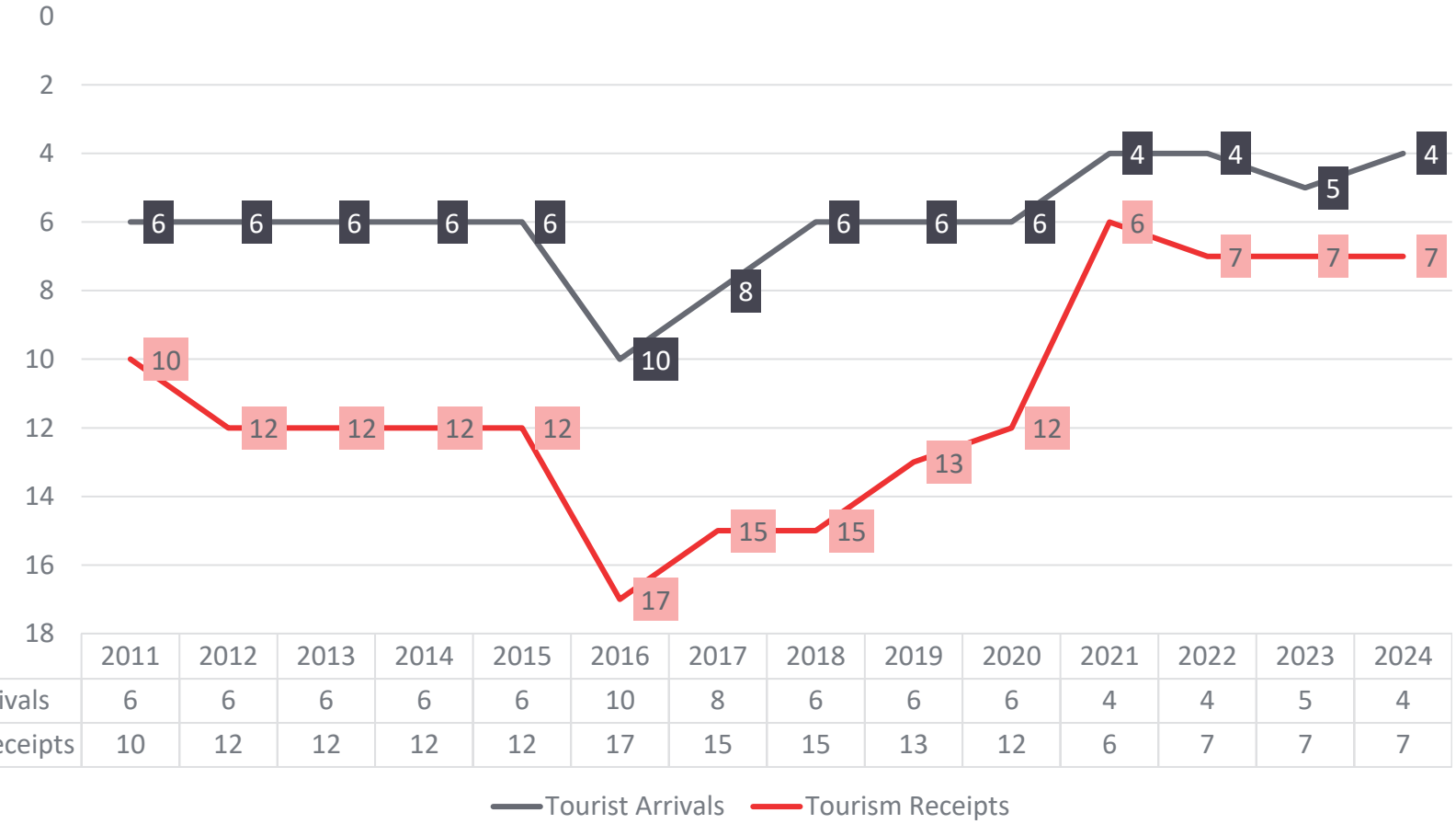

Source: Euromonitor 2023

- In 2024, Istanbul ranked second in the number of international city arrivals with 23 million visitors, marking a 14% year-on-year growth, following Bangkok in the first place with 32,4 million visitors, and ahead of London in third place.
- In 2024, Antalya became the 6th most visited city in the world, following Hong Kong and Mecca, with 19.3 million international visitors. This represents a 17% growth in visitor numbers compared to the previous year

# TOURISM SECTOR IN THE WORLD AND TÜRKİYE`S POSITION

## TÜRKİYE'S RANKING IN WORLD TOURISM LEAGUE BY YEARS

### TÜRKİYE`S RANKING IN WORLD TOURISM LEAGUE BY YEARS




| | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Tourist Arrivals | 6 | 6 | 6 | 6 | 6 | 10 | 8 | 6 | 6 | 6 | 4 | 4 | 5 | 4 |
| Tourism Receipts | 10 | 12 | 12 | 12 | 12 | 17 | 15 | 15 | 13 | 12 | 6 | 7 | 7 | 7 |

- Since 2010, Türkiye mainly secured its place as being the 6th most visited country in the World. In the first year of Covid-19, Türkiye repeated its success, in 2021 climbed 2 steps and became 4th most visited country in the World by 2 consecutive years and after being 5th place in 2023, in 2024 ranked 4th most visited country again.
- Türkiye, which relatively has had low tourism receipts in proportion to the number of visitors for many years, rose in the ranking of tourism revenues after the pandemic, reaching 6th place in 2021 and 7th place in 2022, 2023 and 2024.

Source: UNWTO

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# TOURISM SECTOR IN TÜRKİYE

3

# TOURISM SECTOR IN TÜRKİYE



## KEY DATAS

**62,2***
Million
Foreign Visitors
in 2024

**61,1***
Billion $
tourism revenue in
2024

**972**
$
Tourism Receipts
per Arrival
in 2024

**2nd**
Istanbul ranked
second most visited city
in the World in 2024

**6th**
Antalya ranked
sixth most visited city
in the World in 2024

**1st**
Istanbul Airport is the
busiest in Europe in
2024

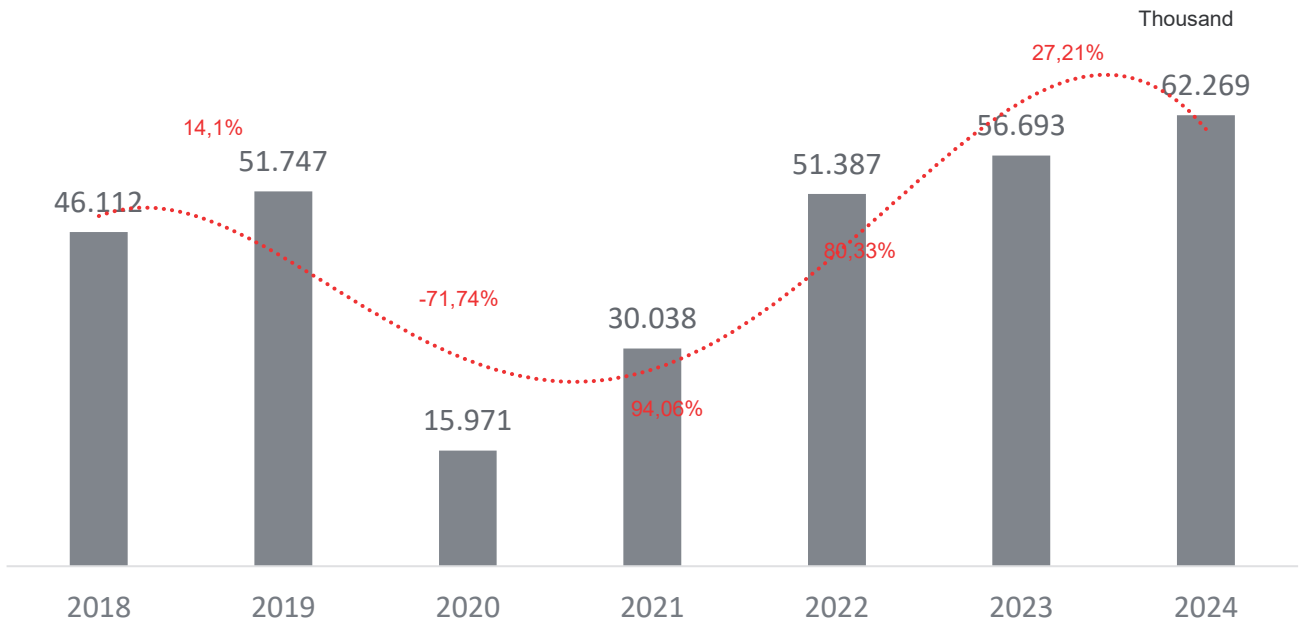
**7th**
Istanbul Airport is the
seventh busiest in the
World in 2024

Source: Ministry of Culture and Tourism*, TurkStat, WTTC (World Travel & Tourism Council),
Note:* Numbers are included of Turkish citizens living abroad.

# TOURISM SECTOR IN TÜRKİYE

## NUMBER OF FOREIGN VISITORS

### NUMBER OF FOREIGN VISITORS 2018-2024 (ANNUAL CHANGE, THOUSAND PEOPLE)




Source: Ministry of Culture and Tourism

- Tourism sector in Türkiye showed strong recovery in 2021, with a 94% increase compared to 2020, reaching 58% of the 2019 level, thanks to COVID-19 precautions and safe tourism certificate.
- In 2022, 51 million foreign visitors visited Türkiye. As an indicator of full recovery, number of foreign visitors turned back to 2019 levels.
- In 2024, more than 62 million foreign visitors visited Türkiye. Which was the record year for Türkiye in terms of number of visitors.

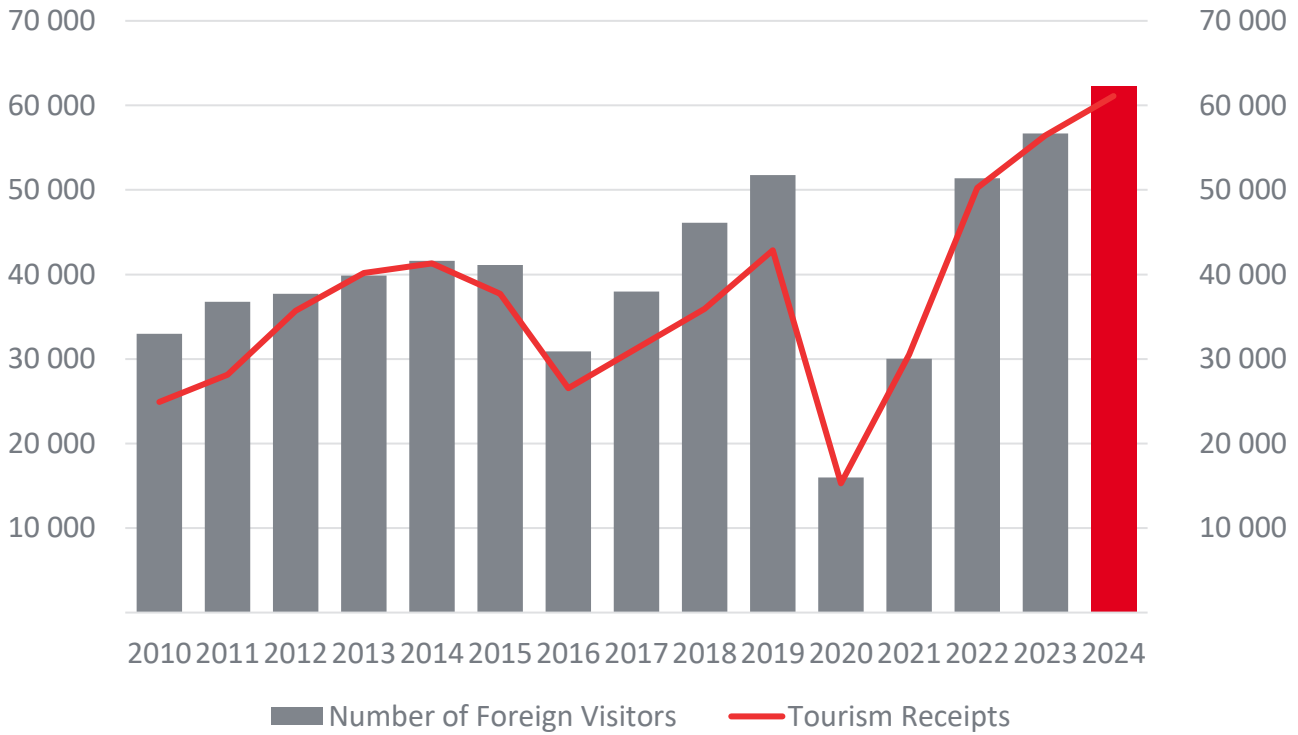
**62,3**

**Million**
**Foreign Visitors in 2024**

**%9,8 ↑**

Source: Ministry of Culture and Tourism

## ARRIVALS OF FOREIGN VISITORS AND TOURISM RECEIPTS BETWEEN 2010-2024
(THOUSAND VISITORS, THOUSAND USD)




Source: Ministry of Culture and Tourism

**Percentage of Foreign Visitors Increase**

- 20,3% — 2019 & 2024
- 9.8% — 2023 & 2024

**Percentage of Tourism Revenue Increase**

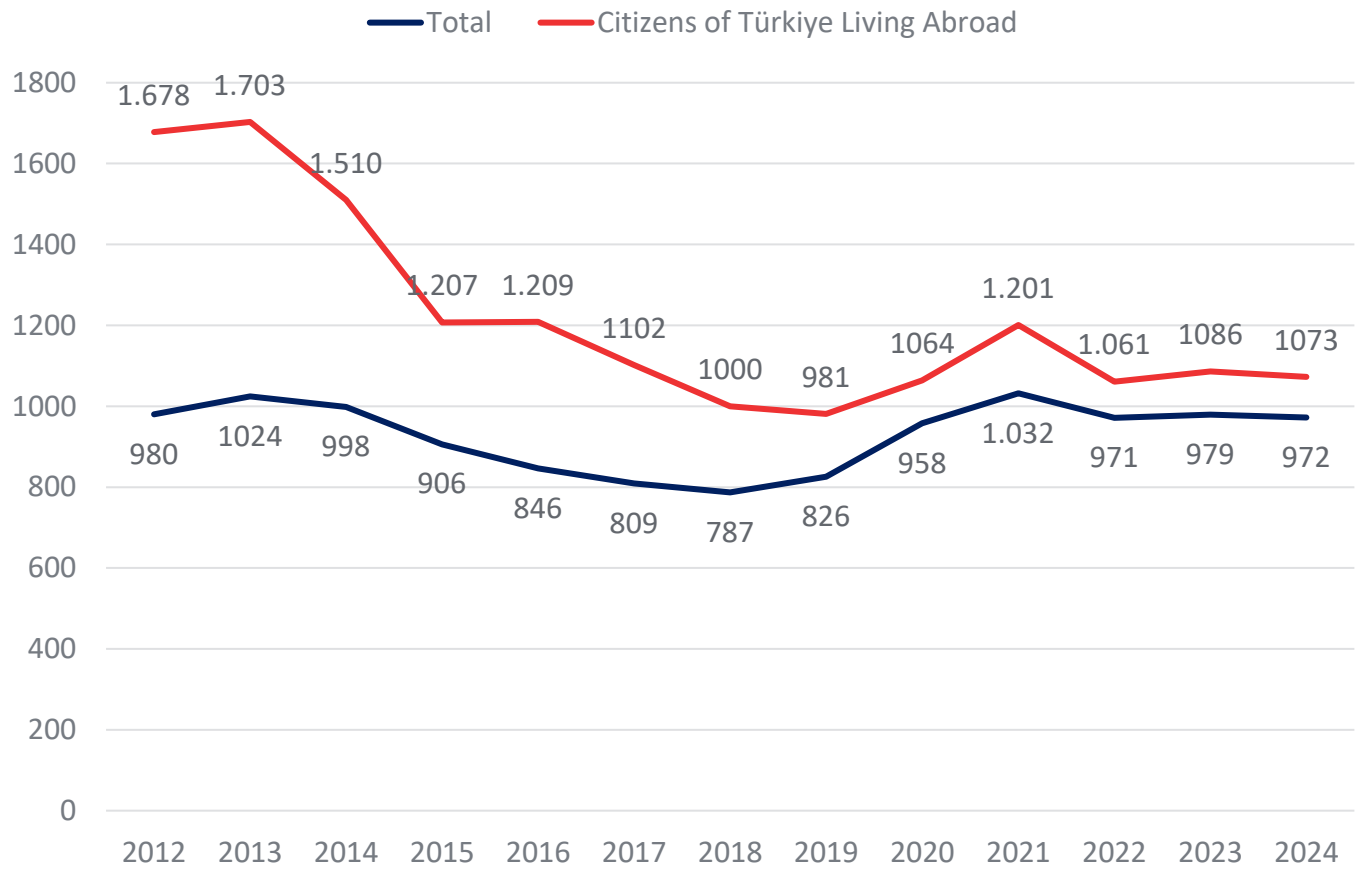
- 42.6% — 2019 & 2024
- 8.3% — 2023 & 2024

**61,1**
**Billion $ tourism revenue in 2024**
Source: Ministry of Culture and Tourism

**52**
**Billion $ tourism revenue from foreign visitors in 2024**
Source: Ministry of Culture and Tourism

- The profile and number of foreign visitors are the main driver in the development of tourism sector in Türkiye. In general, foreign visitors share is more than 85% in total visitors and contribution of citizens of Türkiye living abroad are limited and constant.

## TOURISM RECEIPTS PER ARRIVAL BETWEEN 2012-2024 (ANNUAL CHANGE, USD)




Source: Ministry of Culture and Tourism

**972**

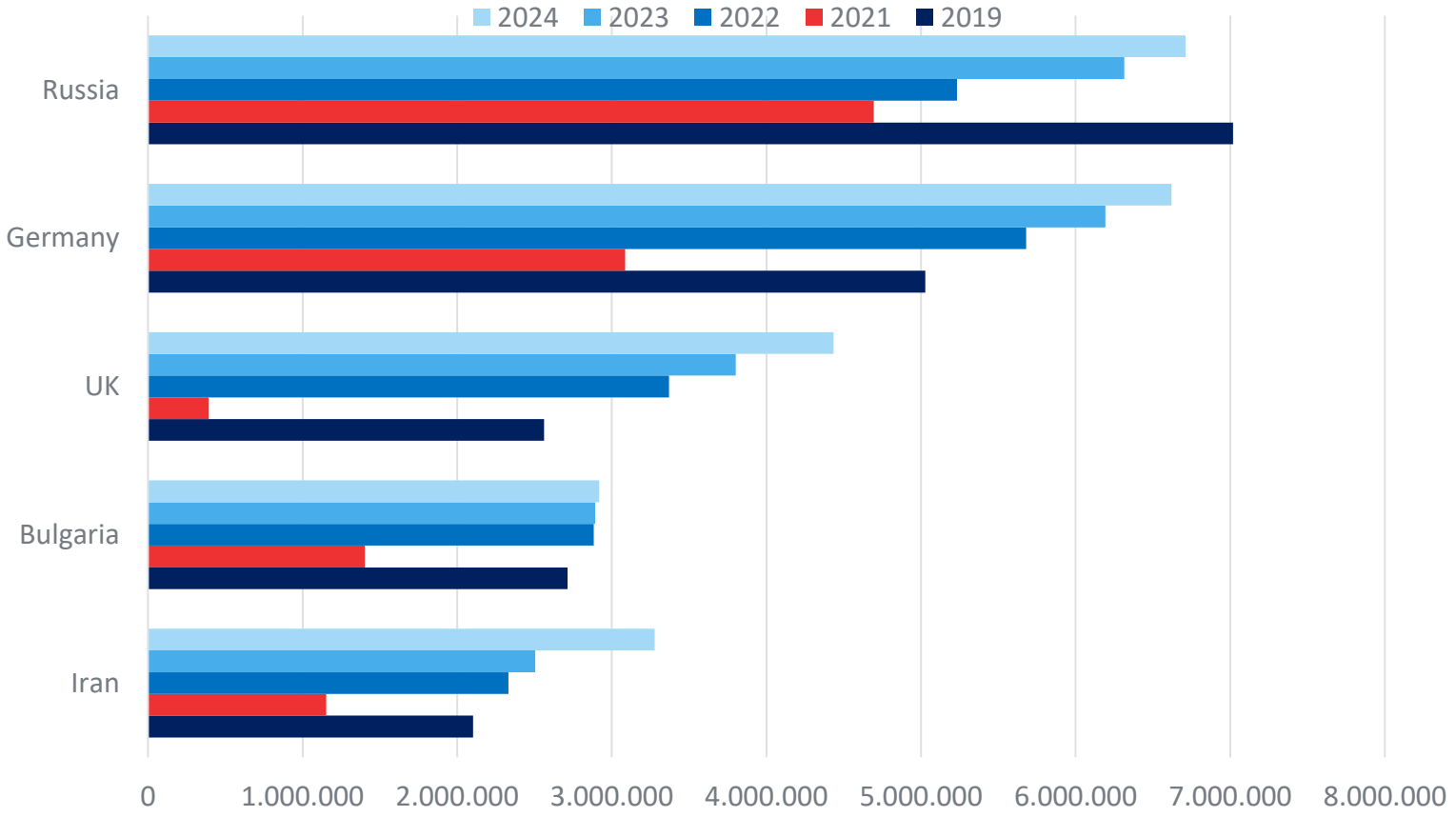
**Billion $**
**Tourism Receipts per Arrival in 2024**

**%23,5 ⬆**
**compared to 2019**
**%0,7 ⬇**
**compared to 2023**

Source: Ministry of Culture and Tourism

- Average expenditure per arrival increased by 23,5% to 972 USD in 2024 when compared with last normal tourism sector season in 2019, before the pandemic.
- Growth trend that seen in tourism arrivals in last years can also be observed in tourism receipts per arrival especially since pandemic.

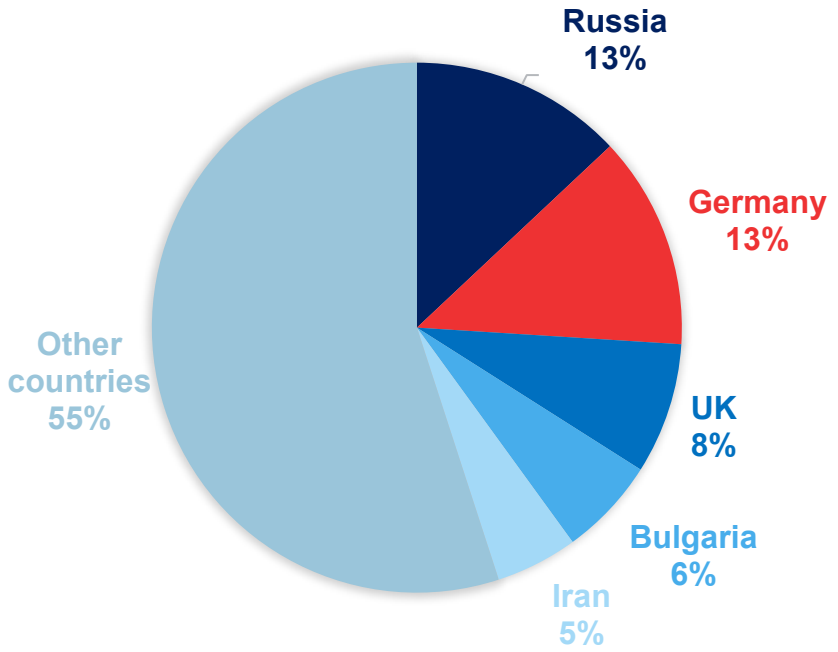
## TOP 5 VISITOR COUNTRIES AND NUMBER OF TOURISTS BETWEEN 2018-2024



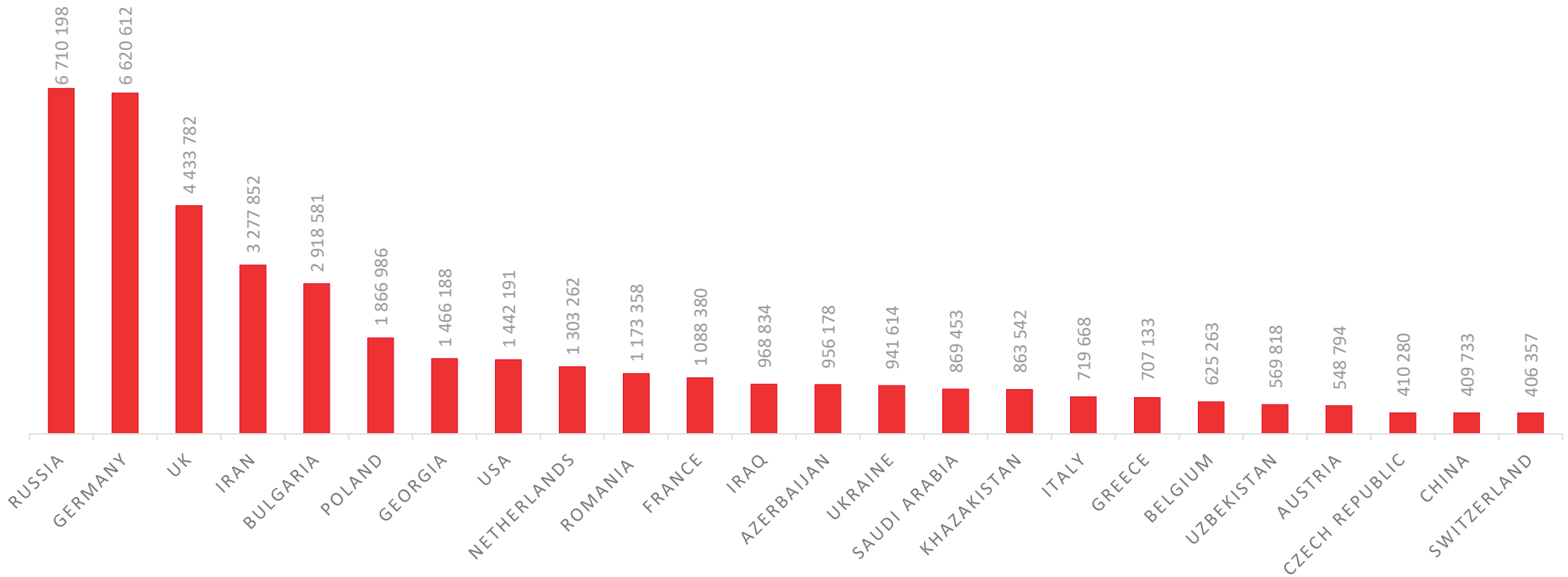

Source: Ministry of Culture and Tourism

## Nationalities of Top Visitors-2024

| | |
|---|---|
| 1– Russia | 6.710.198 tourists |
| 2– Germany | 6.620.612 tourists |
| 3– UK | 4.433.782 tourists |
| 4– Iran | 3.277.852 tourists |
| 5– Bulgaria | 2.918.581 tourists |



## TOP 25 VISITOR COUNTRIES AND NUMBER OF TOURISTS IN 2024




Source: Ministry of Culture and Tourism

# TOURISM SECTOR IN TÜRKİYE

## ARRIVALS TO TOURISM FACILITIES AND OVERNIGHT STAYS

**83,2**

**Million**
**Arrivals to Tourism Facilities in 2024**

**%7,6 ↑**
**Compared to 2023**

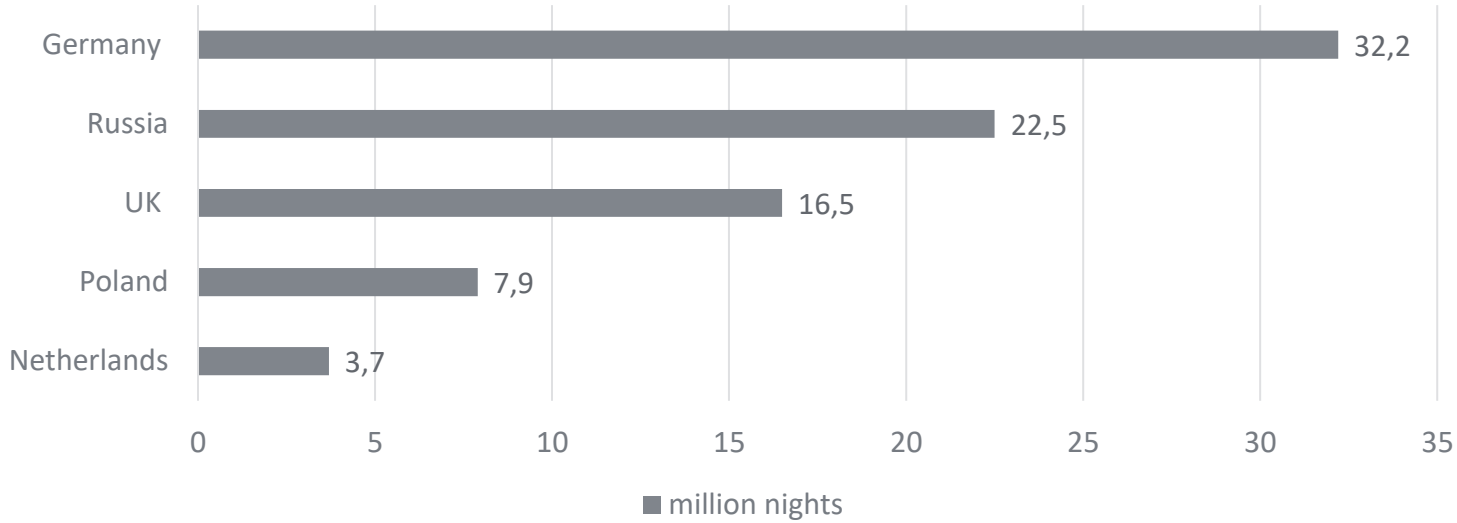
**216**

**Million**
**Overnight Stays in 2024**

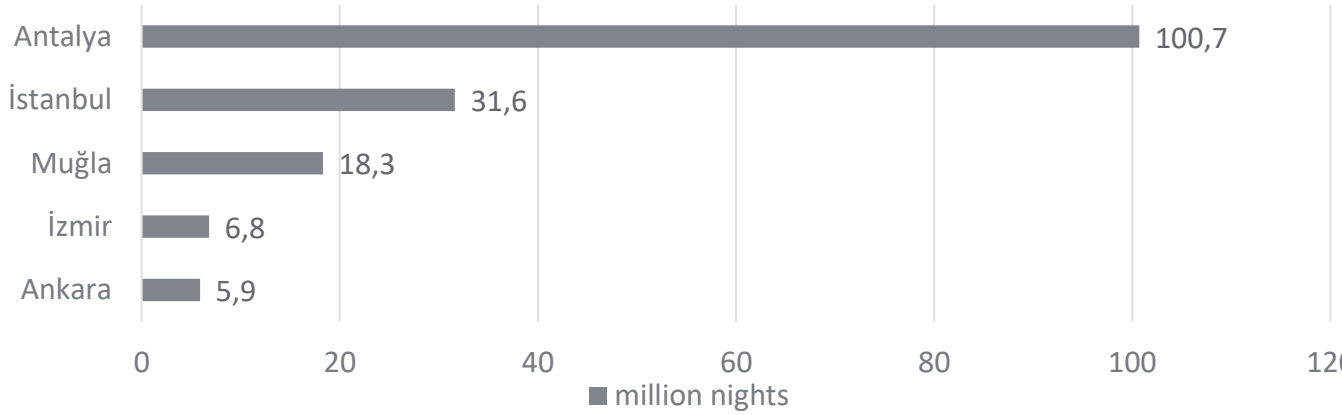
**%6,4 ↑**
**Compared to 2023**

Source: Ministry of Culture and Tourism

### OVERNIGHT STAYS IN 2024 (SOURCE COUNTRY)




### OVERNIGHT STAYS IN 2024 (BY CITY)



# TOURISM SECTOR IN TÜRKİYE

## TOURISM FACILITY SUPPLY

### Total Number of Establishments

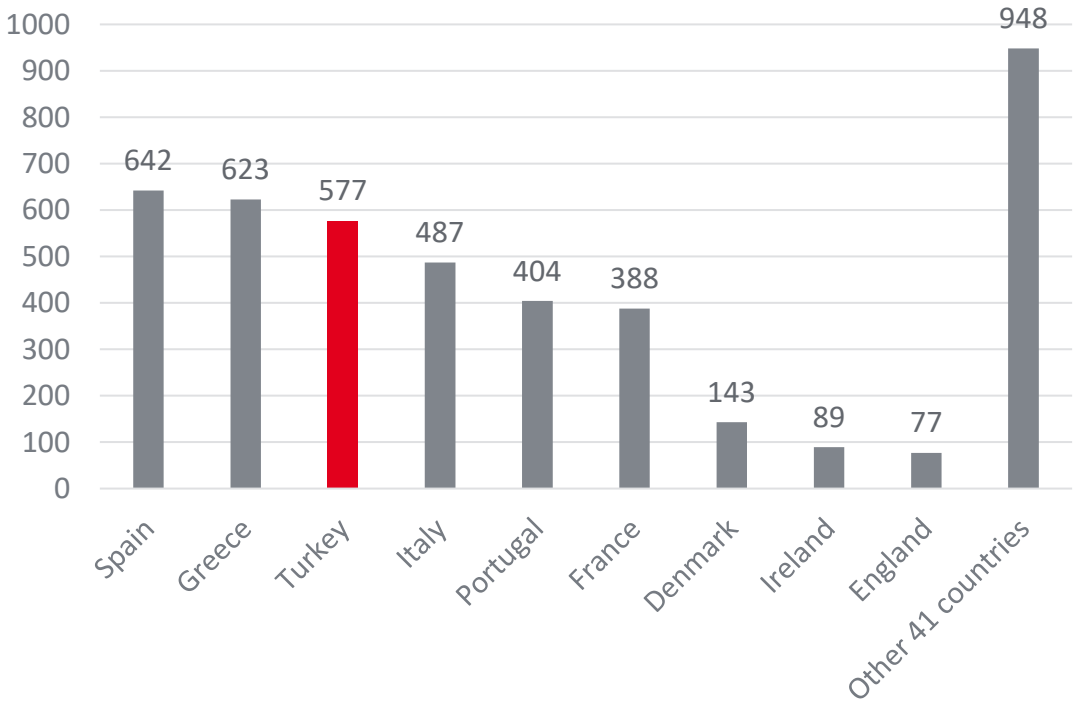
| | 2022 | 2023 | 2025 (August) |
|---|---|---|---|
| | 15,013 | 20,991 | 21,935 |
| | 917,898 | 941,279 | 1,019,661 |
| | 1,898,848 | 1,953,814 | 1,955,559 |

- Türkiye boasts 21,935 tourist accommodation establishments with over 1 million rooms and nearly 2 million bed as of 2025 August.

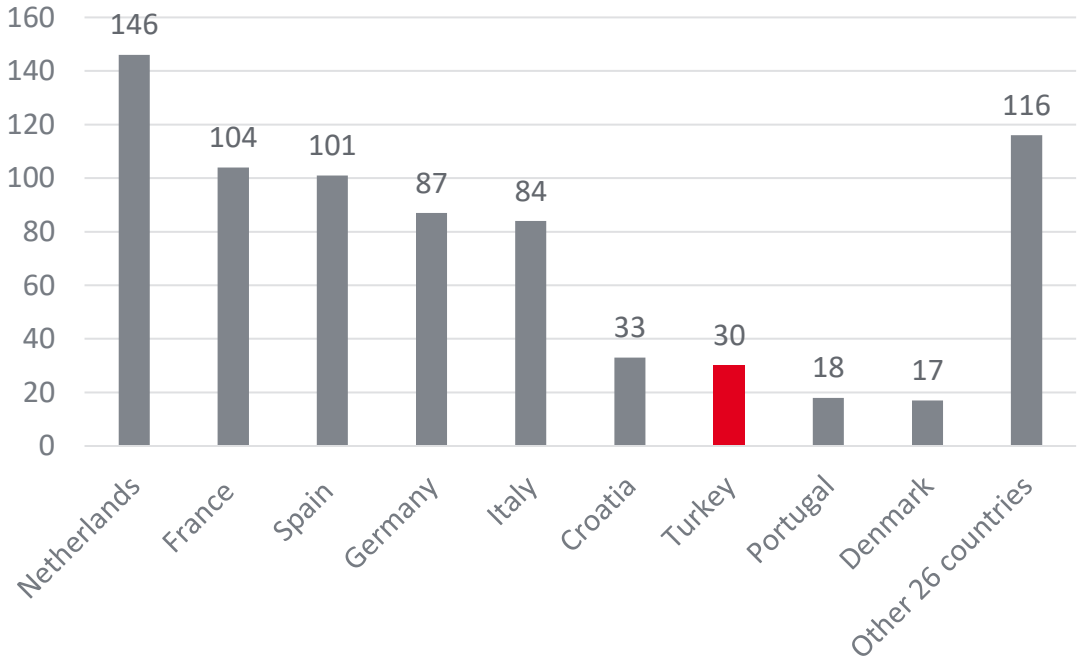
Source: Ministry of Culture and Tourism
Note: With a modification to the Tourism Incentive Law in the year 2022, the permits for facilities previously provided by municipalities are now provided by the Ministry of Culture and Tourism. Consequently, due to the transitional period of 2022-2023, dramatic changes in numbers may be observed.

# BLUE FLAG AWARDED BEACHES AND MARINAS IN TÜRKİYE

## INTERNATIONAL BLUE FLAG AWARDED BEACHES




## INTERNATIONAL BLUE FLAG AWARDED MARINAS




- Türkiye, with 577 blue flag awarded beaches ranked 3rd and with 30 blue flag awarded marinas ranked 7th in the 2025 list.
- The southern Antalya province of Türkiye, often regarded as one of the top tourism destinations in the world, has retained its ranking with the most blue-flagged eco-friendly beaches in the world, with a total of 233. Antalya followed by Muğla with 110, İzmir with 64, Balıkesir with 49 blue flag awarded beaches.

Note: Rankings includes only Northern Hemipshere countries

Source: Blue Flag Global

# TOURISM SECTOR IN TÜRKİYE

## STRATEGIC LOCATION

•Türkiye is geographically well situated to attract arrivals from Western and Eastern Europe as well as the Middle East and North Africa region.

•Türkiye has a wide range of tourism source markets, protecting it from asymmetrical shocks.

**PROXIMITY TO MAJOR MARKETS**
1.3 billion people and $32T GDP in Europe, MENA and Central Asia at 4 hour flight-distance

**CONNECTIVITY**
Turkish Airlines connects you to 353 destinations in 131 countries

**1st**

**Istanbul Airport is the busiest in Europe in 2024 in terms of international passengers***

**7th**

**Istanbul Airport is the 7th busiest in the world in 2024 in terms of international passengers***

**TRANSPORTATION TYPES USED BY FOREIGN VISITORS IN 2024:**

| | |
|---|---|
| 1– Airways | % 75,9 |
| 2– Roadways | % 18,8 |
| 3– Seaways | % 5 |
| 4– Railways | % 0,05 |

**BORDER GATES THAT FOREIGN VISITORS ENTERED TO TÜRKİYE IN 2024:**

| | |
|---|---|
| 1– İstanbul | 18.582.322 |
| 2– Antalya | 15.902.862 |
| 3– Edirne | 4.834.945 |
| 4– Muğla | 3.660.450 |
| 5– İzmir | 1.719.524 |

* International passengers enplaned and deplaned

Source: Ministry of Culture and Tourism, Turkish Airlines, ACI (Airports Council International), UNWTO World Tourism Barometer January 2023

# TOURISM SECTOR IN TÜRKİYE

## UNESCO WORLD HERITAGE LIST

- The United Nations Educational, Scientific and Cultural Organization (UNESCO) has declared 1,154 sites around the world to be of outstanding value to humanity. 897 of the sites are cultural, 218 natural and 39 mixed (cultural and natural).
- Türkiye is home to 19 (17 cultural and 2 mixed) UNESCO World Heritage Sites. Türkiye ranked 16th in the list.
- There are also 1,720 sites in the Tentative List of UNESCO World Heritage Sites.
- Türkiye has 84 sites (77 cultural, 4 mixed and 3 natural) in the Tentative List of UNESCO World Heritage Sites.

Source: UNESCO

# TOURISM SECTOR IN TÜRKİYE

## YEAR-ROUND TOURISM

- Beautiful beaches spread along 4 seas and over 8,300 km of coastline.
- Türkiye is the top choice for Mediterranean holidays, ranking 3rd in the world with a total of 577 Blue Flag beaches.
- Türkiye is home to 19 (17 cultural and 2 mixed) UNESCO World Heritage Sites and has 84 sites (77 cultural, 4 mixed and 3 natural) in the Tentative List of UNESCO World Heritage Sites.
- 22,898 registered archeological sites in Türkiye.
- Türkiye is a country which hosted different cultures throughout history due to its unique geographical location as a bridge between Europe and Asia.
- Architectural heritage of Türkiye extends way back to 9600 BCE in Göbeklitepe to Ottoman Imperial architecture to modern architecture and local architecture styles in Türkiye that consists of palaces, mansions, fortresses and castles, inns and bazaars, religious monuments, cisterns etc.
- Faith tourism, gastro tourism, winter tourism.
- Golf resorts designed by world renowned golf course designers, high quality golf courses that comply with PGA standards.
- Belek, welcomes best golfers all through the year, thanks to the suitable climate with an average temperature of 19°C and sunny days which last more than 300 days. Belek, with 15 different golf courses and luxurious hotels close by them, allows golfers to explore new golf courses whenever they want during the year. Golf courses, the airport and the hotels are in the same region; this provides the golfers the opportunity to play golf in different golf courses without loss of time.
- Halal Tourism is observed to be one of the prospective trends in the last couple of years within Middle Eastern countries. International Muslim traveler arrivals reached 176 million in 2024 and it is expected to reach 186 million in 2025. The estimated arrival could reach 245 million and estimated expenditure could reach USD 235 Billion by 2030.
- In Mastercard-CrescentRating Global Muslim Travel Index 2024, Türkiye ranked 2nd in overall index.
- Newly built medical cities, its numerous hospitals, and high-quality medical services make Türkiye stand out on a global scale.
- In 2024, 1,506,442 patients visited Türkiye for health tourism and received health services. Tourism income from health tourism recorded as more than 3 billion USD in 2024.
- The share of health tourism income in total tourism revenues was %1 in 2002. This rate increased to %4.9 in 2024.
- Outdoor activities, adventure opportunities, recreational activity opportunities are endless in Türkiye such as camping & glamping, cycling, trekking & hiking skiing, diving, windsurfing & kitesurfing, rafting, kayaking.
- Natural wonders to see in Türkiye such as mountains, rivers, lakes, canyons, plateaus, waterfalls, caves, natural parks
- Türkiye ranks 7th worldwide and 1st in Europe in terms of thermal resource richness. Every year, hundreds of thousands of international visitors and patients come to Türkiye's exceptional thermal centers to improve their health and well-being. In the utilization of natural thermal resources, Türkiye holds the 3rd place in Europe, following Germany and Italy. Türkiye is home to over 1,500 thermal springs, around which more than 260 thermal facilities have been established. Thermal therapies in Türkiye can be enjoyed nearly 300 days a year. Many insurance companies from Northern Europe and Scandinavian countries refer their patients to Türkiye for thermal treatments as part of their recovery process.

Source: Ministry of Culture and Tourism, Blue Flag International, Turkstat, UNESCO, Mastercard-CrescentRating Global Muslim Travel Index 2022, GoTürkiye

# TOURISM SECTOR IN TÜRKİYE

## OFFERING LUCRATIVE INCENTIVES IN TOURISM SECTOR

### GENERAL INVESTMENT INCENTIVES

- Customs Duty Exemption
- VAT Exemption

### REGIONAL INVESTMENT INCENTIVES

- Customs Duty Exemption
- VAT Exemption
- Corporate Tax Reduction
- Social Security Premium Support (Employer`s share)

### TOURISM INCENTIVE LAW INCENTIVES

- Land Allocation for Tourism Facility Investments
- Energy Support
- Foreign experts and craftsmen can be employed

### PROPERTY TAX INCENTIVES

- 5 year property tax exemption

## SELECTED INTERNATIONAL HOSPITALITY GROUPS, BRANDS, INVESTORS IN TÜRKİYE

- Many of the top global hotel chains already have a strong presence in the country, and numerous popular brands are represented.
- A range of markets are catered for, from budget holidays to high-end travel and luxury resorts.

PRESIDENCY OF
THE REPUBLIC OF TÜRKİYE
**INVESTMENT &
FINANCE OFFICE**

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