

INVEST IN  TÜRKİYE

# TOURISM SECTOR IN TÜRKİYE



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



# AGENDA



1

Executive  
Summary

2

Tourism Sector in the World  
and Türkiye's Position

3

Tourism Sector  
in Türkiye

## EXECUTIVE SUMMARY



## FAVORABLE INVESTMENT ENVIRONMENT

- Türkiye was 4<sup>th</sup> most visited country in the World with 29.9 million visitors in 2021
- Türkiye ranked 6<sup>th</sup> in the World with USD 26.6 billion tourism receipts in 2021
- Türkiye ranked 3<sup>rd</sup> in the World with 529 blue flag awarded beaches in 2022
- Year-round tourism
- Proximity to major markets and connectivity
- Occupancy rate in Istanbul ranked at 2<sup>nd</sup> place in Europe in 2021
- 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 Middle East and North Africa region



## ROBUST GROWTH IN THE SECTOR

- 51,4 Million visitors in 2022, same level as 2019, recovery from Covid-19.
- In 2022, 45 million foreign visitors visited Türkiye. As an indicator of full recovery, number of foreign visitors turned back to 2019 levels
- 46,3 Billion USD tourism receipts in 2022. Highest tourism revenue of Türkiye
- Contribution of Travel & Tourism to GDP in 2021 was 7.3%
- 2.42 Million - Employment in tourism sector in 2021. 8.4% of total employment in Türkiye



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2 Tourism Sector in the World and Türkiye's Position

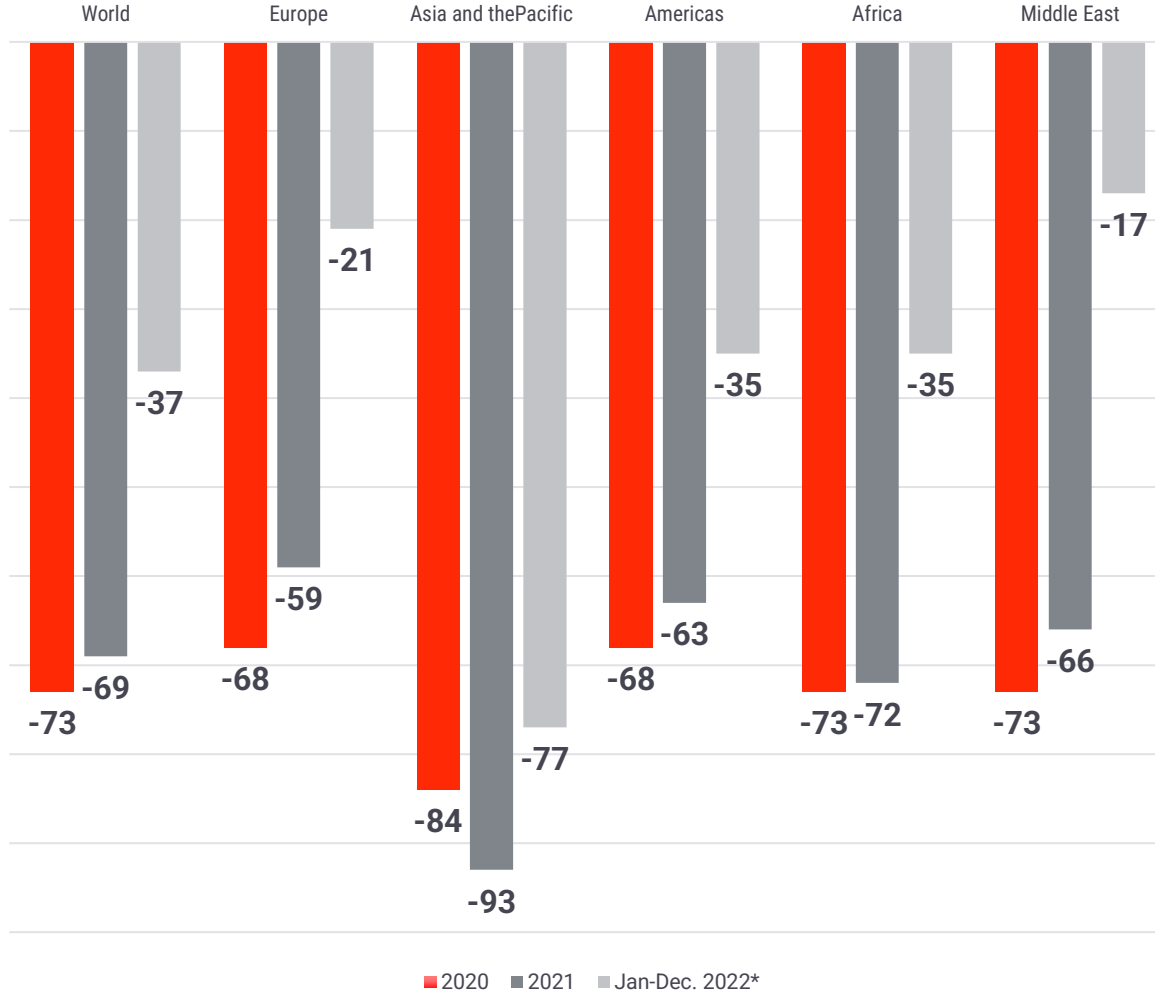
3 Tourism Sector in Türkiye



# TOURISM SECTOR IN THE WORLD AND TÜRKİYE'S POSITION

# TOURISM SECTOR IN THE WORLD AND TÜRKİYE'S POSITION

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



\* Provisional Data

Source: UNWTO World Tourism Barometer January 2023

- Over 900 million tourists travelled internationally in 2022, double those in 2021 though still 37% fewer than in 2019.
- International tourism recovered 63% of pre-pandemic levels in 2022. All regions enjoyed significant increases in 2022 while Europe and Middle East in the lead.
- Europe, the world's largest destination region, recorded 585 million arrivals in 2022 to reach nearly 80% of pre-pandemic levels (-21% over 2019).
- The Middle East enjoyed the strongest relative increase across regions in 2022 with arrivals climbing to 83% of pre-pandemic numbers (-17% versus 2019). The region welcomed large events such as Expo 2020 Dubai and the FIFA World Cup in Qatar, as well as a highly attended Hajj pilgrimage in Saudi Arabia.
- Africa and the Americas both recovered about 65% of its pre-pandemic visitors, while Asia and the Pacific reached only 23%, due to stronger pandemic-related restrictions.
- The year 2022 saw a strong rebound in tourism spending, resulting in the recovery of pre-pandemic levels in income across many destinations.

# TOURISM SECTOR IN THE WORLD AND TÜRKİYE'S POSITION

## INTERNATIONAL TOURIST ARRIVALS, DISTRIBUTION BY REGION, 2022



Region	Share (%)	Tourist Arrivals (million)	Change (%) 22/21*	Change (%) 22/19*
Europe	63.8	584.9	92	-21.4
Asia and the Pacific	9.2	84.4	241	-76.5
Americas	15.5	142.4	74.9	-35.1
Africa	4.9	45	132.4	-34.6
Middle East	6.6	60.3	144.4	-17.4
World	100	917	101.6	-37.4

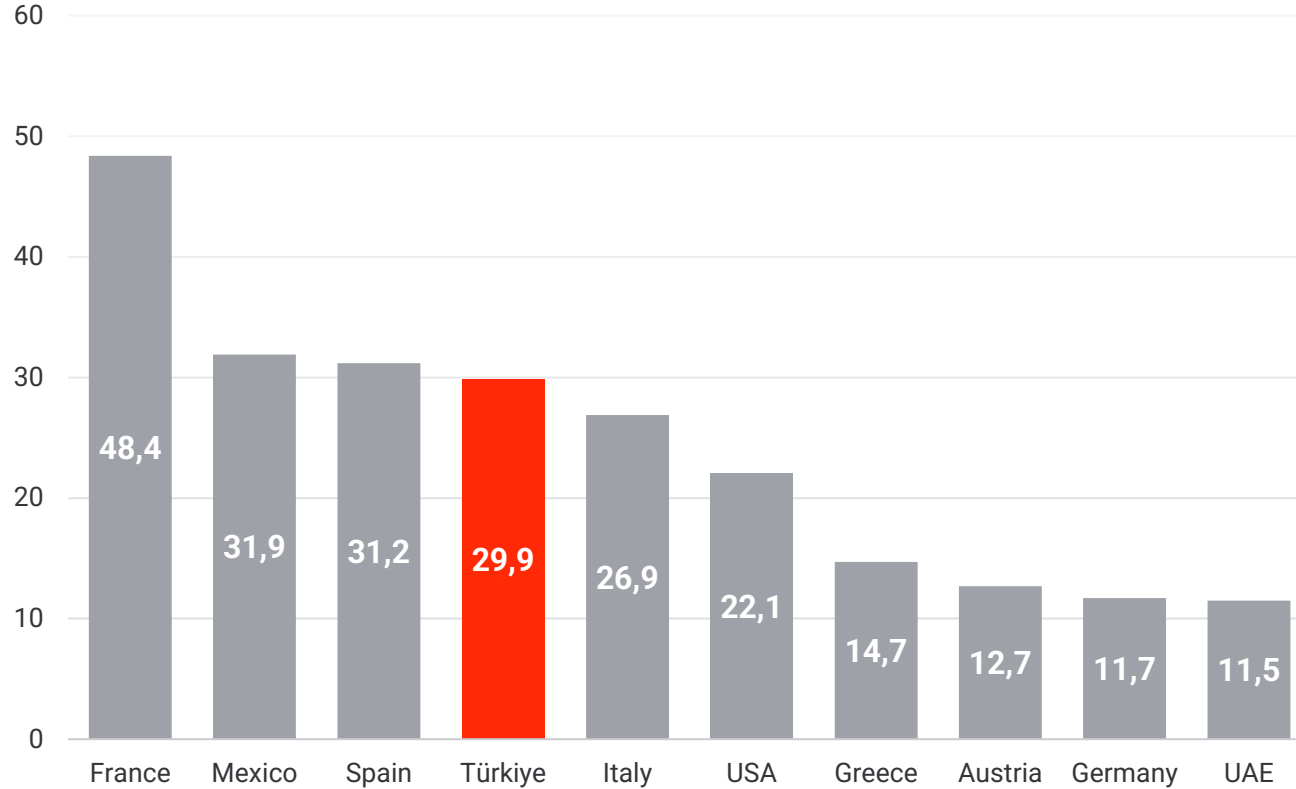
\* Provisional Data

Source: UNWTO World Tourism Barometer January 2023

- Europe attracted more than half of total tourists in the world in **2019** with 746.3 million tourist arrivals (50.9%). Asia and the Pacific recorded 360.4 million tourist arrivals (24.6%) while Americas recorded 219.3 million (14.9%), Africa and Middle East recorded 70 million (4.8%) tourist arrivals in 2019.
- In **2022**, Europe attracted 584.9 million tourist arrivals (63.8%). Asia and the Pacific recorded 84.4 million tourist arrivals (9.2%) while Americas recorded 142.4 million (15.5%), Middle East recorded 60.3 million (6.6%) and Africa recorded 45 million tourist arrivals.
- Europe's share increased from 50.9% to 63.8% when 2022 and 2019 tourist arrivals were compared.



### TOP DESTINATIONS BY INTERNATIONAL TOURIST ARRIVALS, 2021\* (MILLION)



- France was the most visited country in 2021 with 48,4 million visitors. Mexico came 2<sup>nd</sup> with 31,9 million visitors. Spain recorded 31,2 million tourist arrivals in 2021 ranked as 3<sup>rd</sup> most visited country.
- Türkiye was the 4<sup>th</sup> most visited country in the World in 2021. 6.6% of total visitors in the world and 9.8% of total visitors in Europe with 29.9 million tourist arrivals.
- Türkiye followed by Italy with 26,9 million visitors. USA ranked 6<sup>th</sup> and recorded 22.1 tourist arrivals. Greece recorded 14.7, Austria recorded 12,7 million, Germany recorded 11,7 million and UAE recorded 11,5 tourist arrivals in 2021.

\* Provisional Data

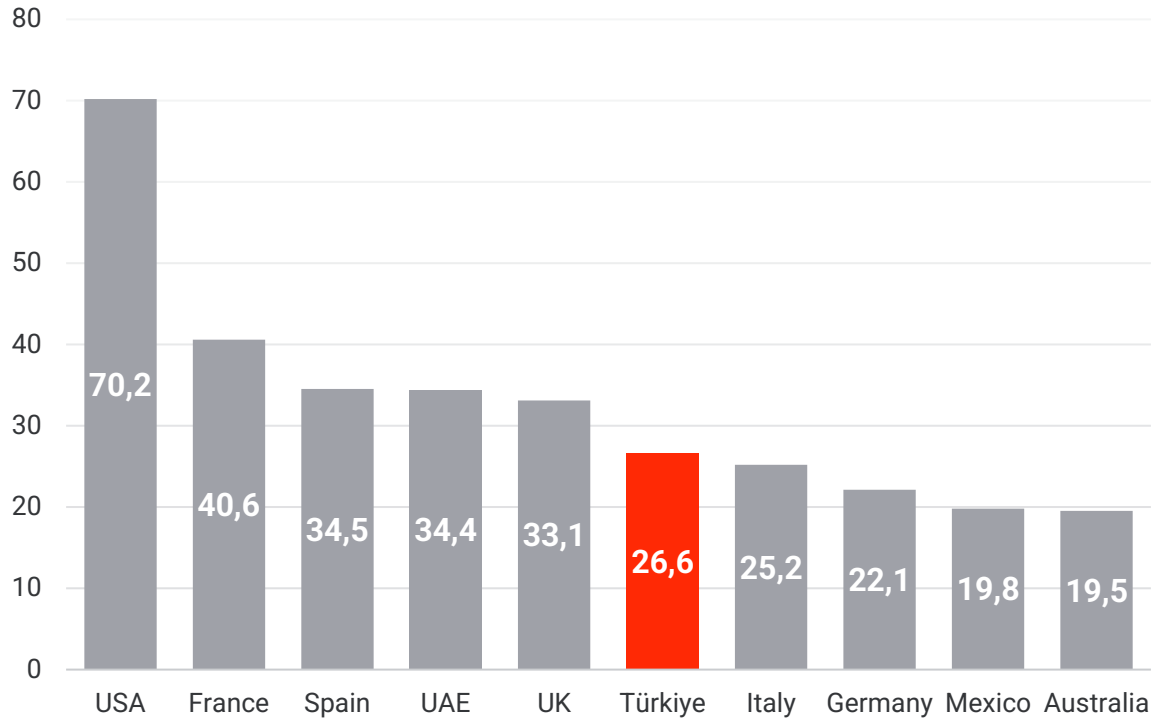
Source: UNWTO World Tourism Barometer January 2023

# TOURISM SECTOR IN THE WORLD AND TÜRKİYE'S POSITION

## INTERNATIONAL TOURISM RECEIPTS



### INTERNATIONAL TOURISM RECEIPTS, 2021\* (USD BILLION)



\* Provisional Data

Source: UNWTO World Tourism Barometer January 2023

### INTERNATIONAL TOURISM RECEIPTS, 2021\* Per Arrival (USD)

USA	3,180
France	840
Spain	1,110
UAE	3,000
UK	5,270
<b>Türkiye</b>	<b>890</b>
Italy	940
Germany	1,890
Mexico	620
Australia	68,690

- Türkiye ranked 6<sup>th</sup> with USD 29.8 billion tourism revenues in 2021. 99.8% increase in tourism receipts of Türkiye when compared with previous year.
- Notable increases in international tourism receipts were recorded across most destinations, in several cases higher than their growth in arrivals. This was supported by the increase in average spending per trip due to longer periods of stay, the willingness by travelers to spend more in their destination, and higher travel costs partly due to inflation.
- In 2022, several destinations reported tourism receipts above pre-pandemic levels in the first ten to twelve months of 2022, including Türkiye (+40%), Romania (+25%), Mexico (+13%), Portugal (+15%), Latvia (+14%), Pakistan, Morocco (both +6%) and France (+1%).

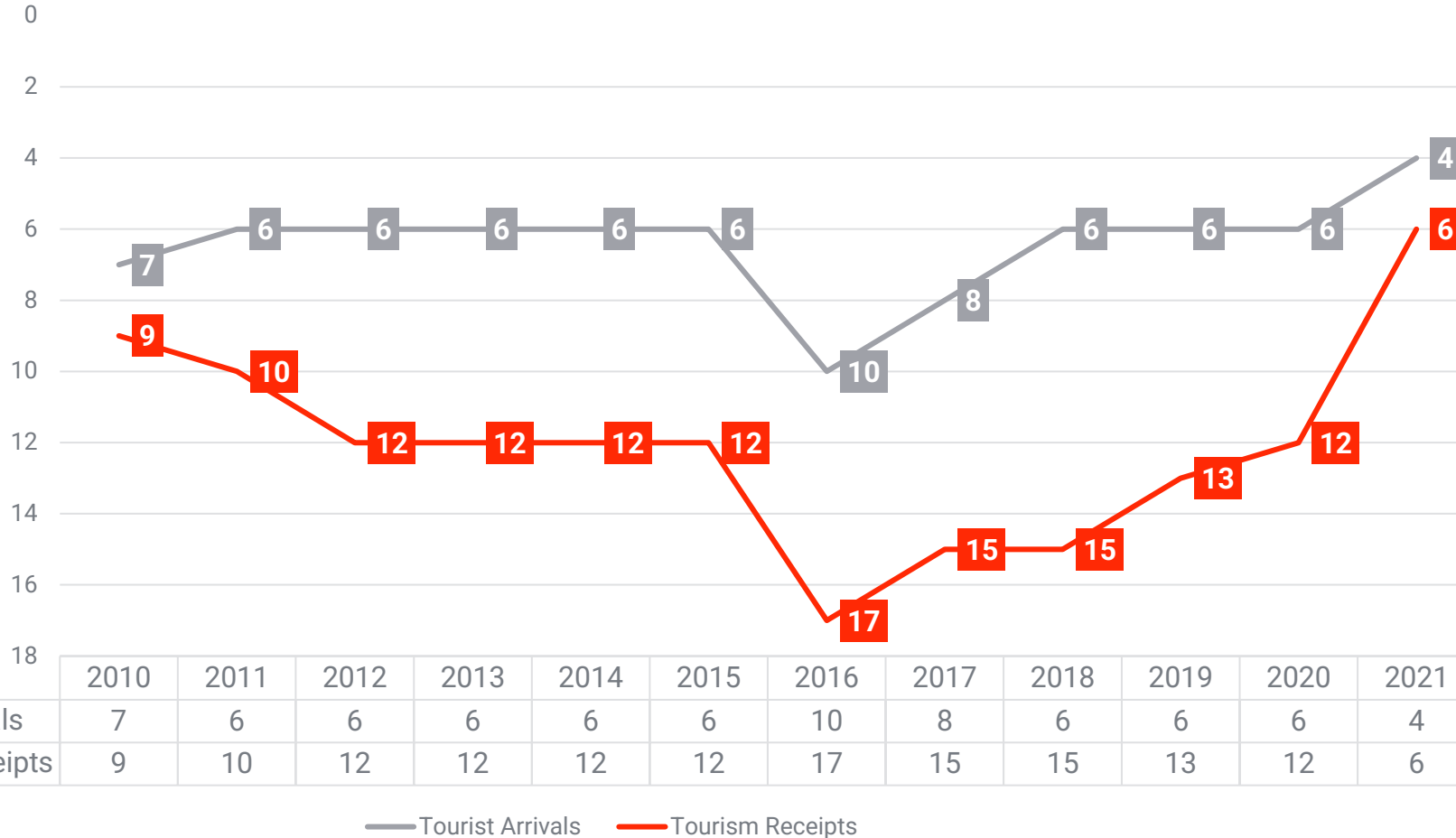


# TOURISM SECTOR IN THE WORLD AND TÜRKİYE'S POSITION

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



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



- Since 2010, Türkiye mainly secured its place as being the 6<sup>th</sup> most visited country in the World. In the first year of Covid-19, Türkiye repeated its success, in 2021 climbed 2 steps and became 4<sup>th</sup> most visited country in the World.
- Covid-19 measures and safe tourism certificate have positively affected the tourism sector in Türkiye. Also not closing the borders completely helped Türkiye to be discovered and rediscovered by high spending tourists.
- In tourism receipts, as an indicator of elevating tourist profile, Türkiye ranked 6<sup>th</sup> in 2021.
- Türkiye is expected to be in the top countries in 2022 rankings as UNWTO shared Türkiye tourism receipts are above pre-pandemic levels.

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# TOURISM SECTOR IN TÜRKİYE



**51,4**

Million  
visitors in 2022

**46,3**

Billion \$  
tourism revenue in 2022

**2,42MN**

Contribution of Travel &  
Tourism to Employment in 2021

8.4% of total jobs  
Change: +14.0%

**7,3%**

Contribution of Travel &  
Tourism to GDP in 2021

TRY 525.5BN (USD 59.3BN)  
Change: +60.6%  
Economy change: +11.4%

**44,6MN**

Foreign Visitors in 2022

**\$901**

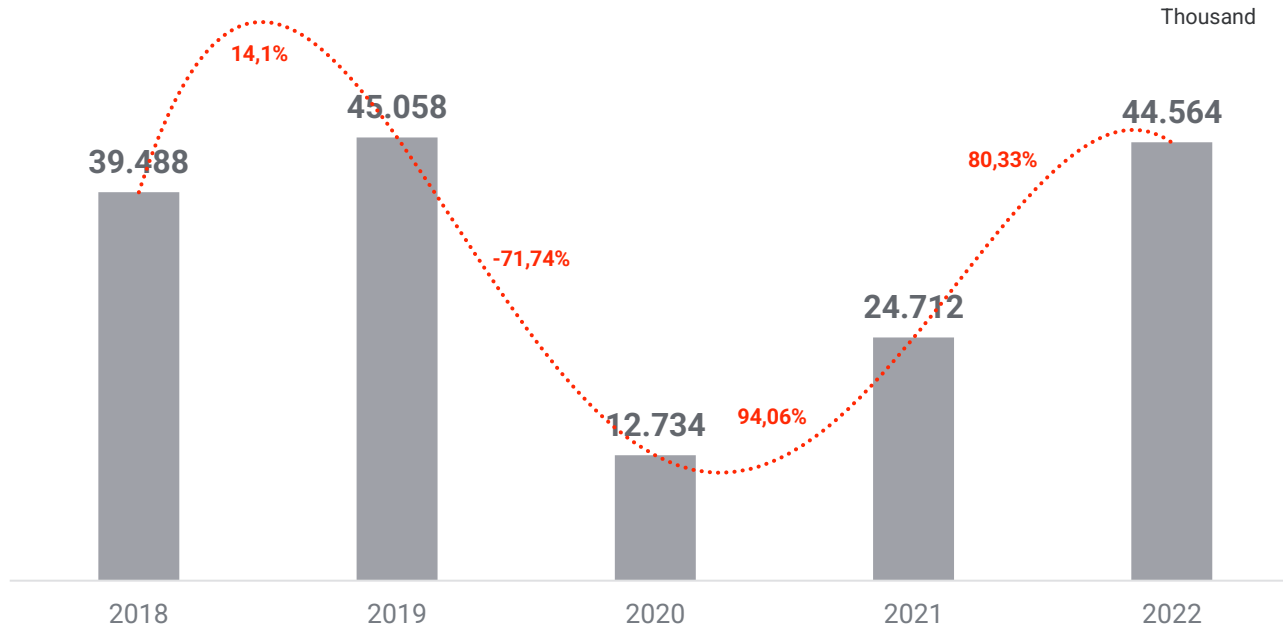
Tourism Receipts  
per Arrival in 2022

**2<sup>nd</sup>**

Occupancy rate in Istanbul ranked at  
in second place in 2021 in Europe



### NUMBER OF FOREIGN VISITORS 2018-2022 (ANNUAL CHANGE, THOUSAND PEOPLE)



Source: Ministry of Culture and Tourism

- Number of foreign visitors decreased dramatically by 72% in 2020 with travel restrictions, closed borders, travel bans due to Covid-19.
- Tourism sector in Türkiye showed strong recovery in 2021 with 94% increase by the help of covid-19 precautions and safe tourism certificate.
- In 2022, 45 million foreign visitors visited Türkiye. As an indicator of full recovery, number of foreign visitors turned back to 2019 levels.

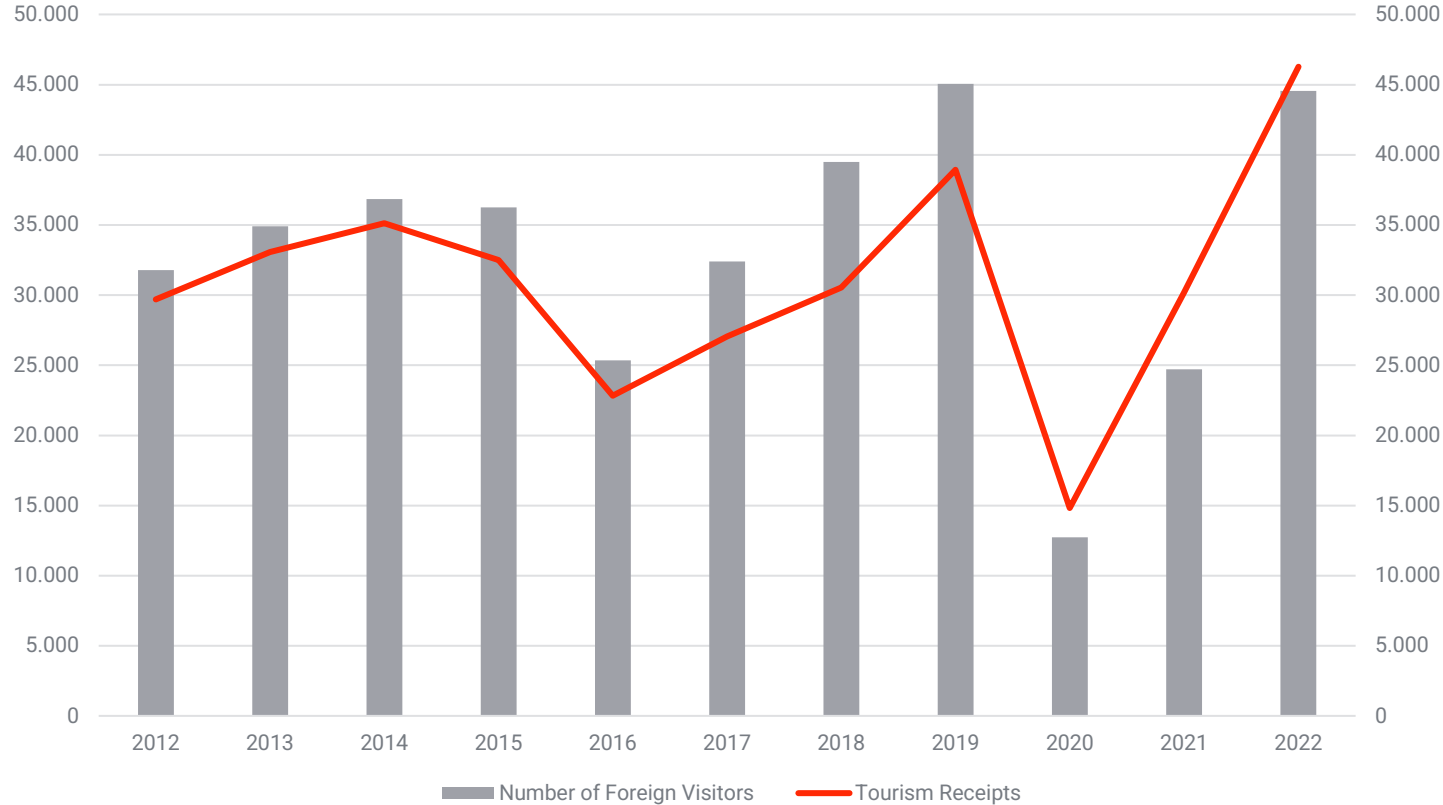
**44,6**  
Million  
Foreign Visitors in 2022

**%80,33 ↑**

Source: Ministry of Culture and Tourism



### ARRIVALS OF FOREIGN VISITORS AND TOURISM RECEIPTS BETWEEN 2010-2020 (THOUSAND VISITORS, THOUSAND USD)



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 80% in total visitors and contribution of citizens of Türkiye living abroad are limited and constant.

↑ **18.9%**  
2019 & 2022

↑ **53.4%**  
2021 & 2022

**46,3**  
Billion \$  
tourism revenue in 2022

Source: Ministry of Culture and Tourism

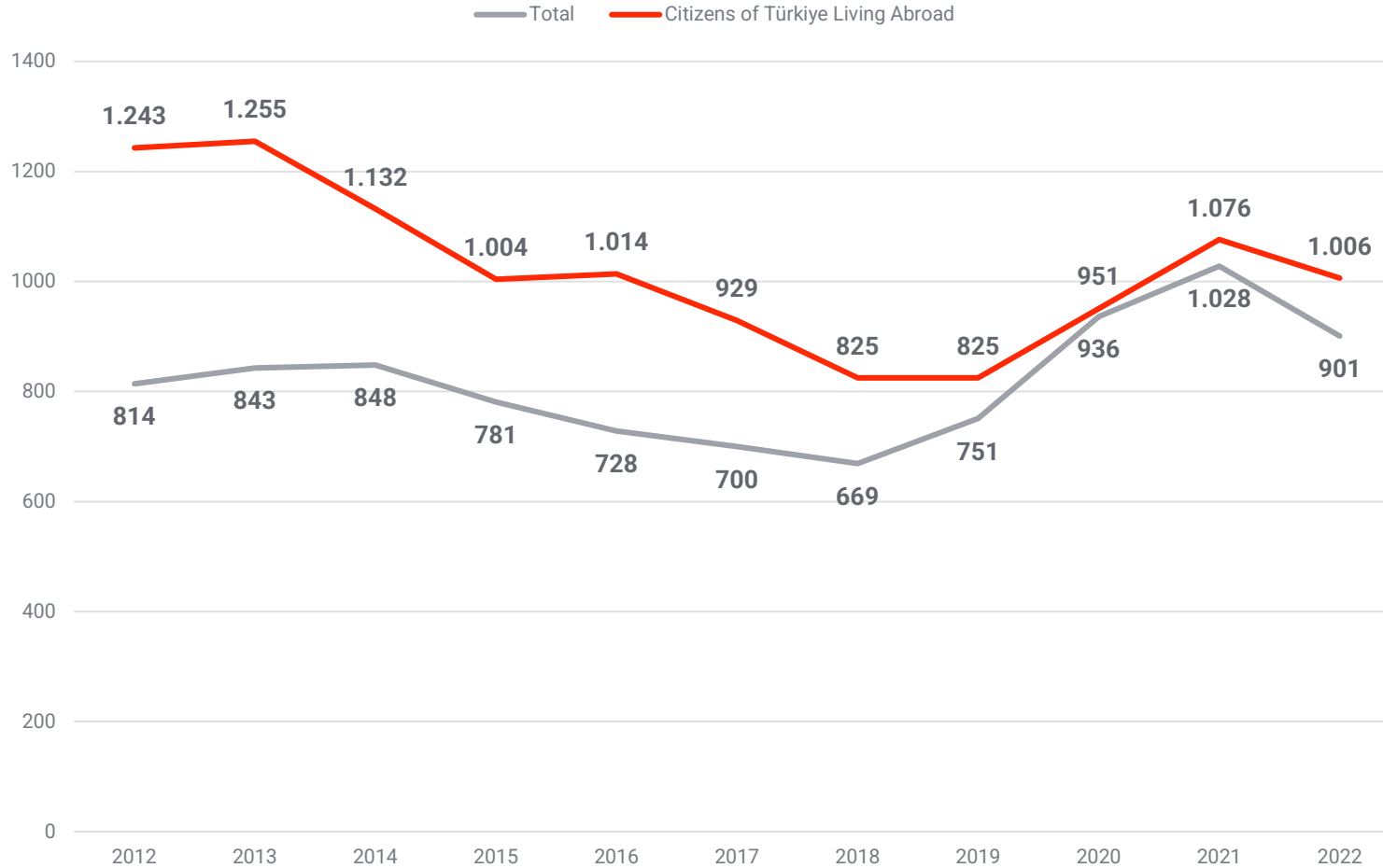
**39,2**  
Billion \$  
tourism revenue from  
foreign visitors in 2022

Source: Ministry of Culture and Tourism





### TOURISM RECEIPTS PER ARRIVAL BETWEEN 2012-2022 (ANNUAL CHANGE, USD)



Source: Ministry of Culture and Tourism

# \$901

Tourism Receipts per Arrival  
in 2022

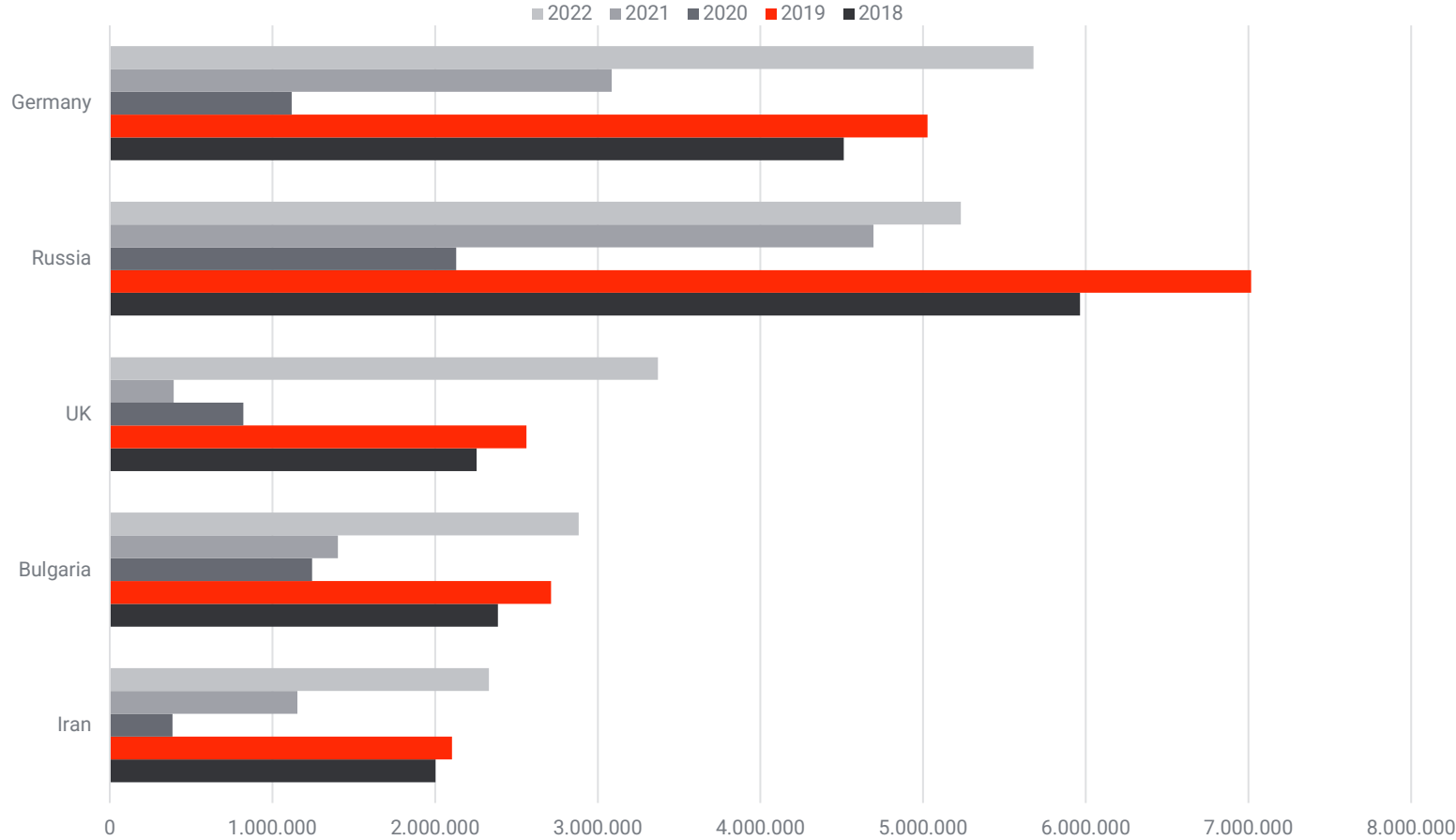
**%20 ↑**  
compared to 2019

Source: Ministry of Culture and Tourism

- Average expenditure per arrival increased by 20% to 901 USD in 2022 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.



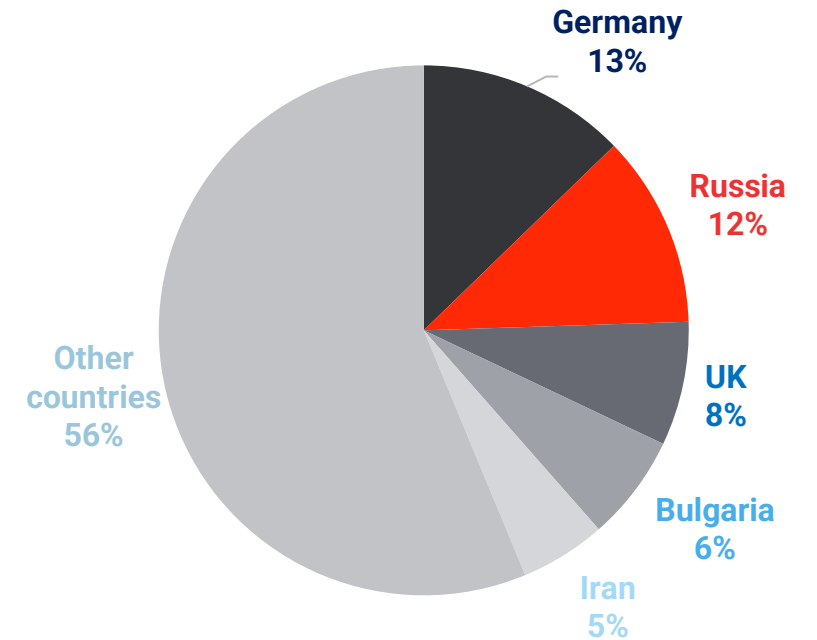
### TOP 5 VISITOR COUNTRIES AND NUMBER OF TOURISTS BETWEEN 2015-2020



Source: Ministry of Culture and Tourism

### Nationalities of Top Visitors-2022

1- Germany	5.679.194 tourists
2- Russia	5.232.611 tourists
3- UK	3.370.739 tourists
4- Bulgaria	2.882.512 tourists
5- Iran	2.331.076 tourists





## TOURISM EXPENDITURES AND GROWTH RATES OF THE TOP 10 COUNTRIES WITH THE HIGHEST TOURISM EXPENDITURES (2019 and 2021)

Rank (2019)		(USD Billion)	Rank (2021)		(USD Billion)
		2019			2021*
	World	1,494		World	637
1	China	254,6	1	China	105.7
2	USA	132,3	2	USA	56.9
3	Germany	93,1	3	Germany	47.8
4	United Kingdom	70,6	4	France	34.6
5	France	50,5	5	UK	24.3
6	Russian Federation	36,2	6	UAE	21.8
7	Australia	36.0	7	Korea(ROK)	16.7
8	Canada	35,3	8	Italy	15
9	Korea (ROK)	32,7	9	Belgium	14.7
10	Italy	30,3	10	India	14.3

\* Provisional Data

Source: UNWTO World Tourism Barometer March 2021, UNWTO World Tourism Barometer January 2023

- Travellers from China and United States created 25,9% of total tourism expenditures, while top 10 countries in the list created 51,6% of total tourism expenditures in **2019**.
- Travellers from China and United States created 25,5% of total tourism expenditures, while top 10 countries in the list created 64,2% of total tourism expenditures in **2021**.
- Germany, UK and Russia, top 3 source countries of Türkiye are at the top 10 list of countries with the highest tourism expenditures.

UNWTO published only 2021 rankings in January 2023 tourism barometer but the recovery can also be seen in outbound tourism, with strong international spending in the first ten to twelve months of **2022** from major source markets such as France (-4% over 2019), Germany (-8%), Italy (-10%) and the United States (-15%), compared to 2019. Emerging markets with robust growth in spending in 2022 include Qatar (+29%), India (+10% through June) and Saudi Arabia (+7% through September)



# 92,4

Million  
Arrivals to Tourism  
Facilities in 2022

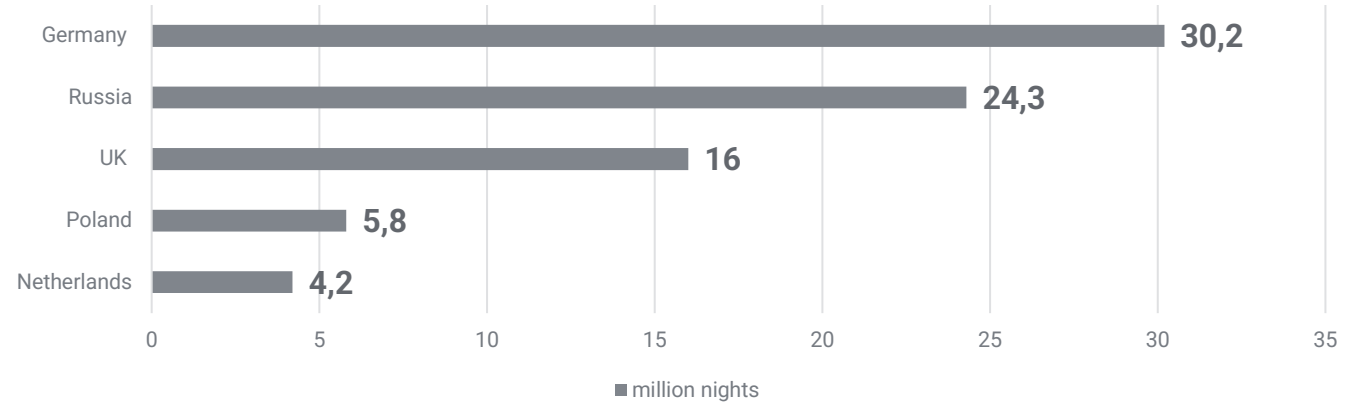
**%30,6 ↑**  
Compared to 2021

# 237,7

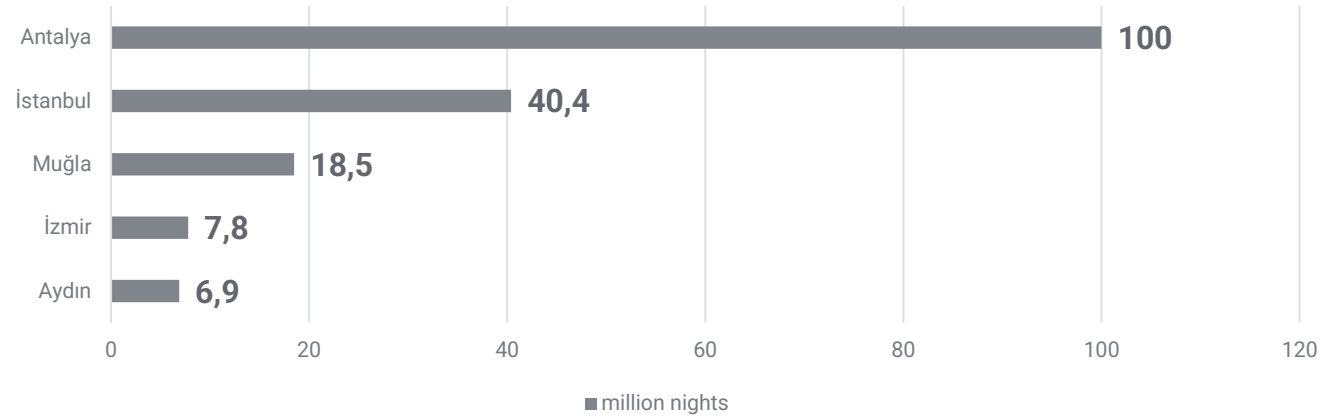
Million  
Overnight Stays in 2022

**%35 ↑**  
Compared to 2021

### OVERNIGHT STAYS IN 2022 (SOURCE COUNTRY)

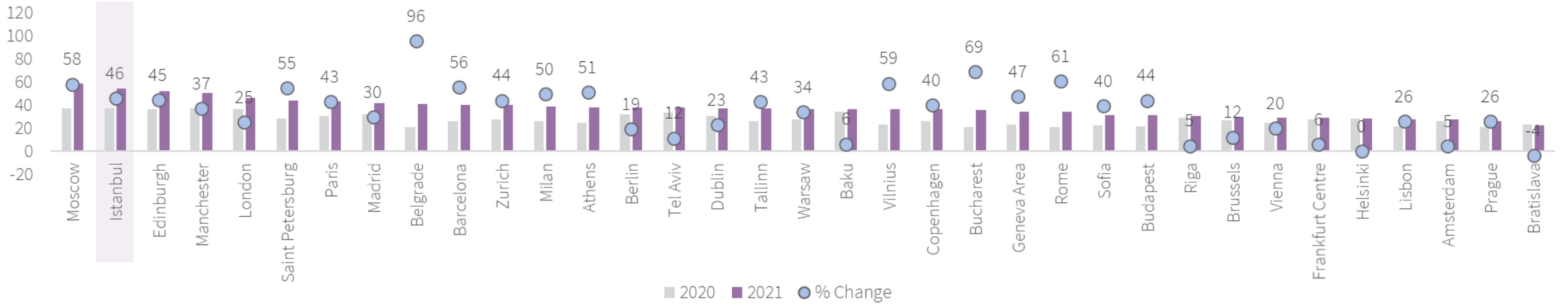


### OVERNIGHT STAYS IN 2022 (BY CITY)

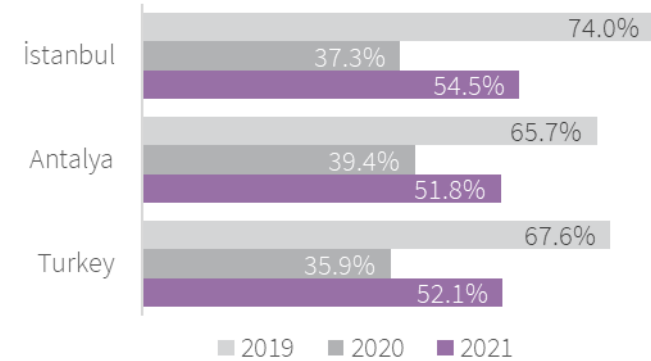




### OCCUPANCY RATE IN ISTANBUL RANKED AT 2<sup>ND</sup> PLACE WITH 54.5% RATION IN 2021



Türkiye	<u>67.6%</u>	<u>35.9%</u>	<u>52.1%</u>
	2019	2020	2021
Europe	<u>72.2%</u>	<u>33.1%</u>	<u>43.3%</u>
	2019	2020	2021



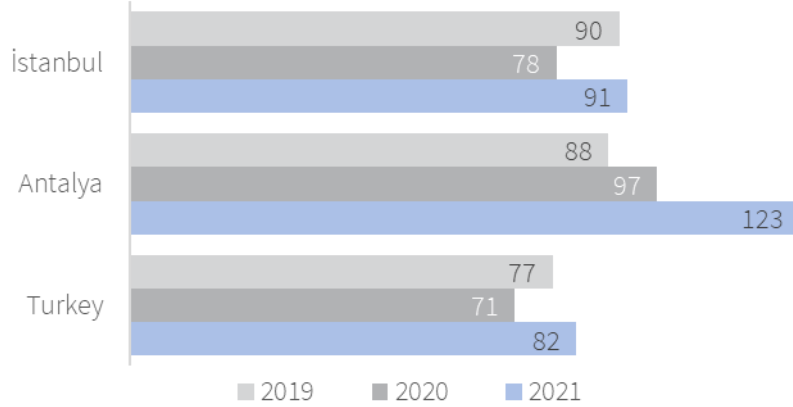
According to STR, global occupancy rates reached 57% in December 2022, from 43% in January 2022. Global occupancy saw a gradual improvement throughout 2022, with peak rates above 65% in the June-October period. The Middle East (65%) saw the highest occupancy rates in December, followed by Europe (58%), Africa (56%), the Americas and Asia and the Pacific (both 54%).





### AVERAGE DAILY RATE, in EUR

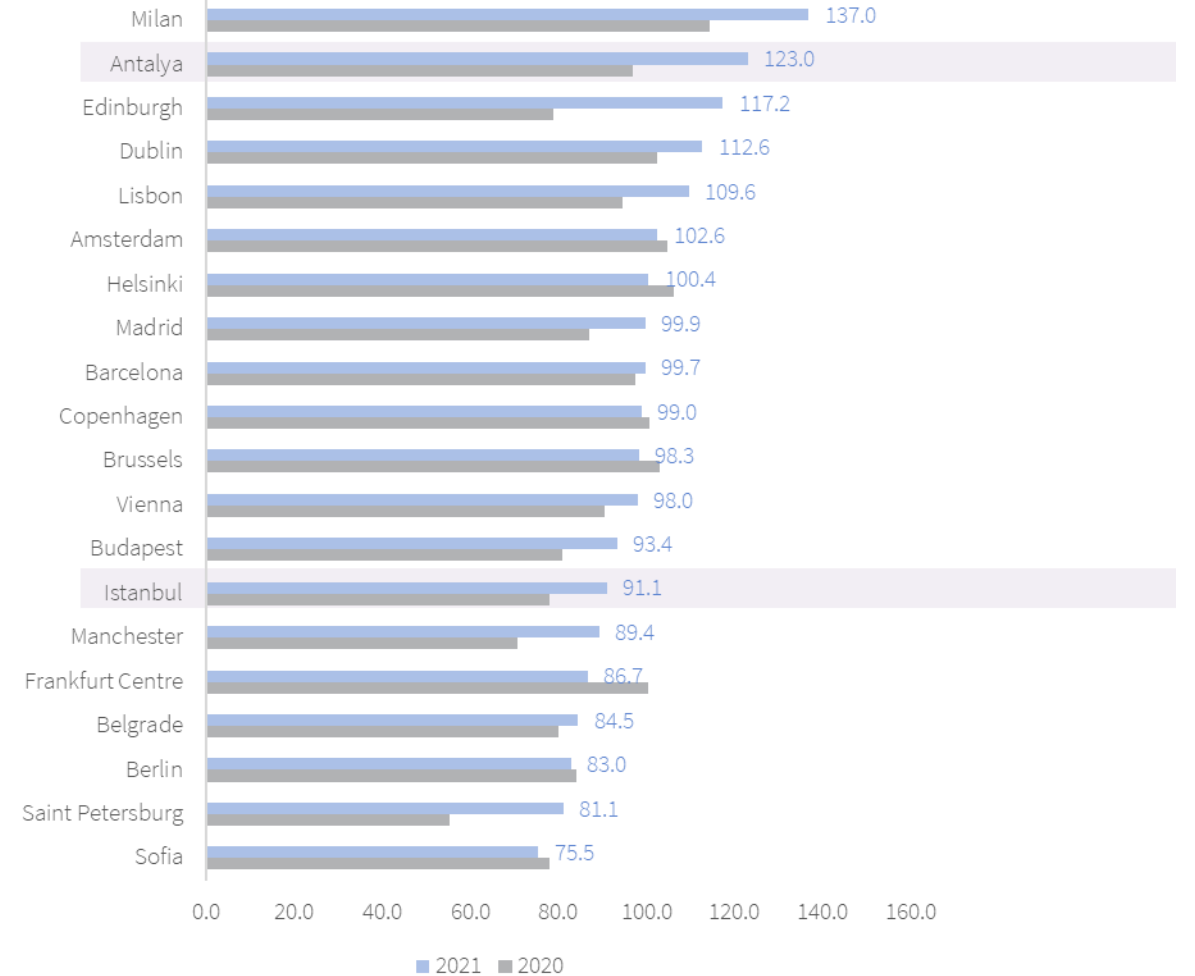
Türkiye	<b>77.5</b> 2019	<b>70.5</b> 2020	<b>81.7</b> 2021
Europe	<b>113.4</b> 2019	<b>91.3</b> 2020	<b>104</b> 2021



- ADR figures have fully recovered to pre-pandemic levels in 2021, especially for the coastal regions of Türkiye such as Antalya, Muğla and Bodrum. In Antalya, ADR was realized at 122.5 EUR0, well above the European average of 104 EUR.

Source: STR

### AVERAGE DAILY RATE, in EUR

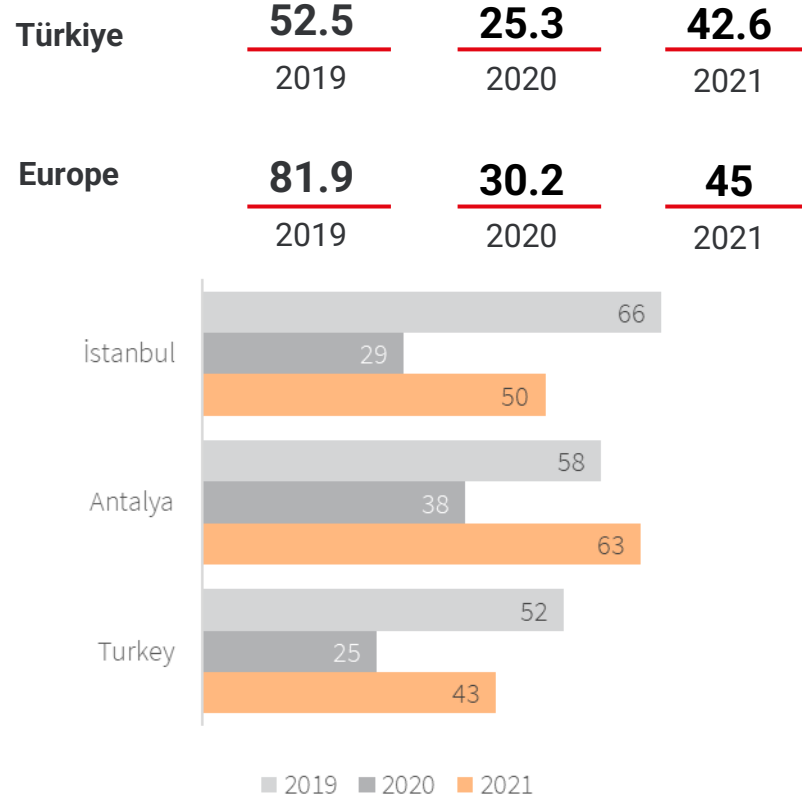


# TOURISM SECTOR IN TÜRKİYE

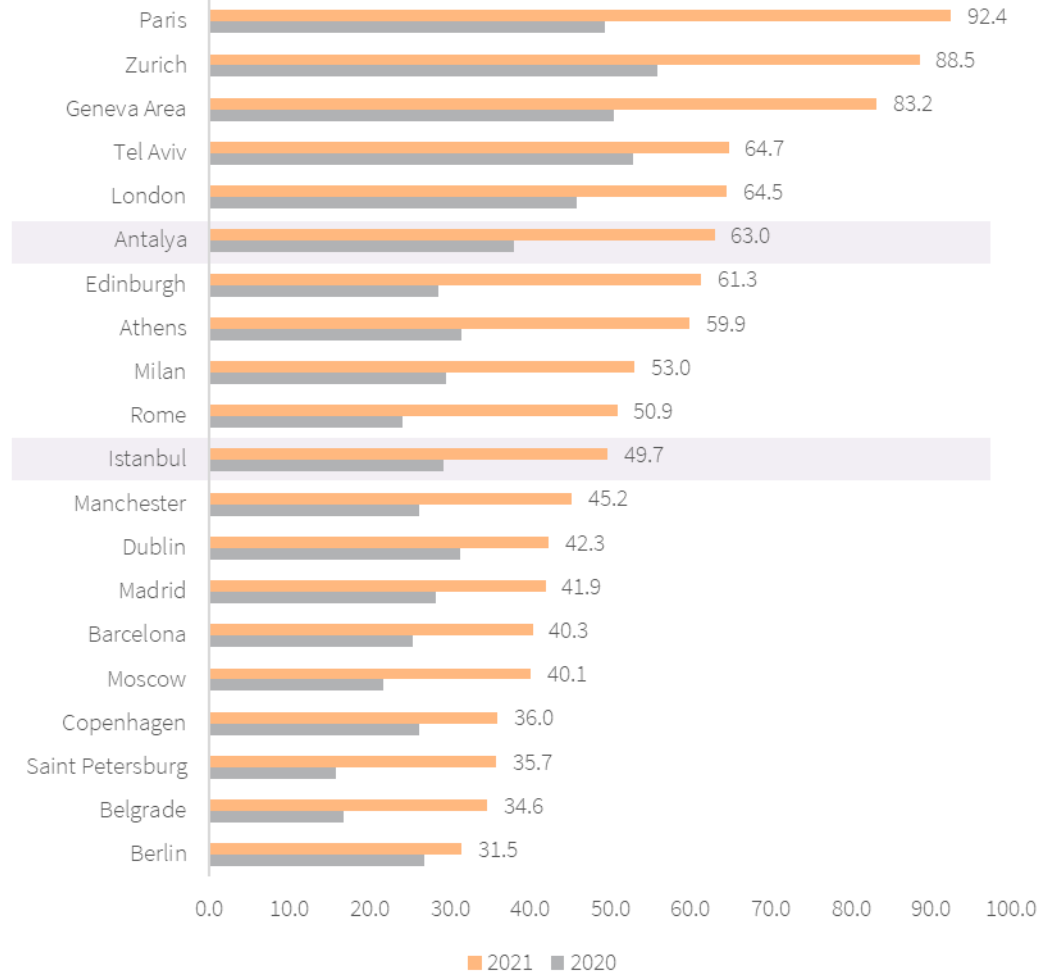
## KEY PERFORMANCE INDICATORS REVENUE PER AVAILABLE ROOM



### Revenur per Available Room, in EUR



### Revenue per Available Room, in EUR



Source: STR



### Total Number of Establishments



**12,865**

2019

**13,476**

2020

**14,831**

2021



**795,297**

2019

**818,417**

2020

**848,663**

2021



**1,718,862**

2019

**1,764,340**

2020

**1,825,589**

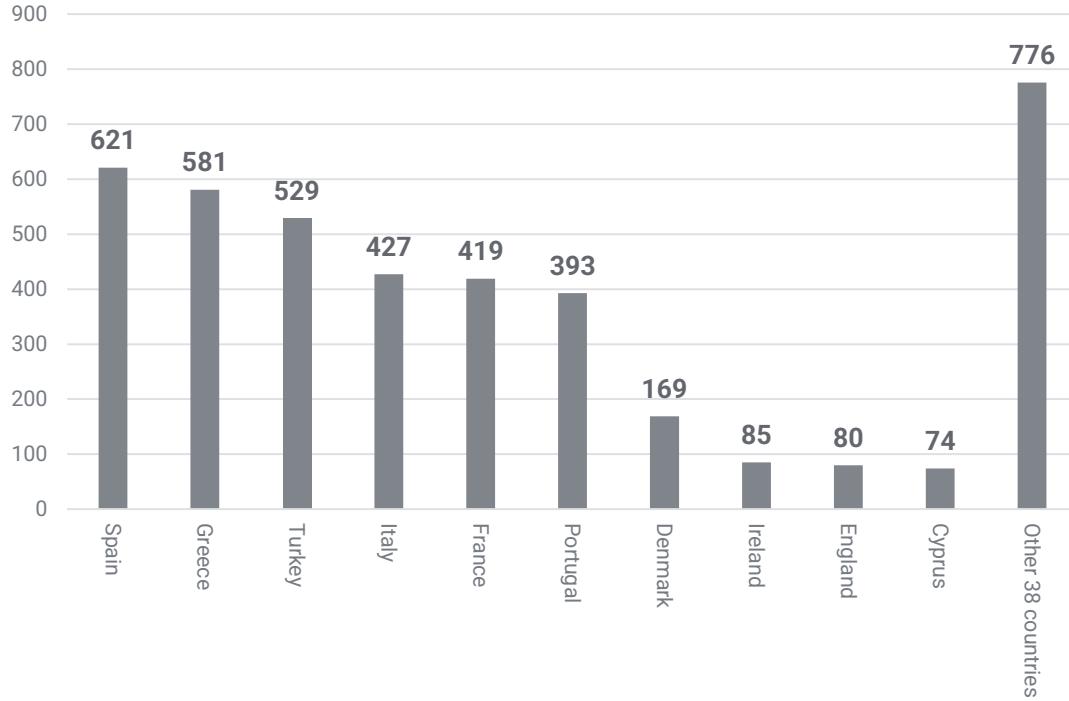
2021



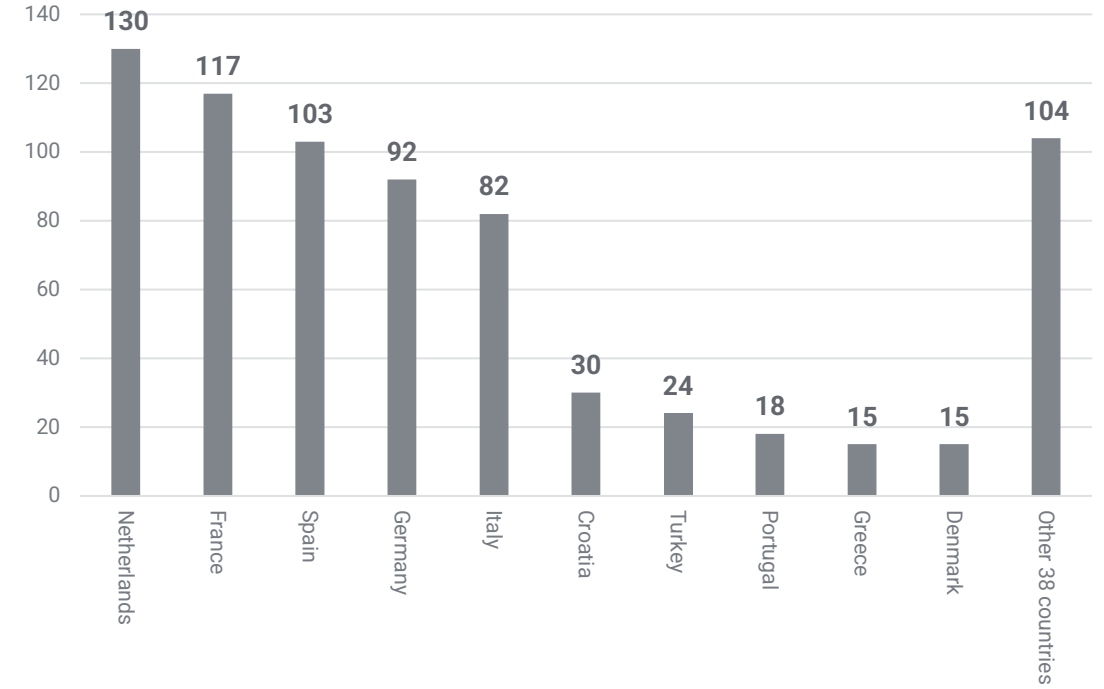
- Türkiye boasts 14,831 tourist accommodation establishments with over 848,000 rooms as of 2021 year-end – a 7.67% annual increase in terms of establishments.
- While 64% of total tourism facility stock is licensed by municipality, 32% of hotels have a tourism operating license and 4% a tourism investment license.



### INTERNATIONAL BLUE FLAG AWARDED BEACHES



### INTERNATIONAL BLUE FLAG AWARDED MARINAS



- Türkiye, with 529 blue flag awarded beaches ranked 3<sup>rd</sup> and with 24 blue flag awarded marinas ranked 7<sup>th</sup> in the 2022 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 231. Antalya followed by Muğla with 111, İzmir with 66, Aydın with 36 blue flag awarded beaches.

Note: Rankings includes only Northern Hemisphere 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 \$26T GDP in Europe, MENA and Central Asia at 4 hour flight-distance

**CONNECTIVITY**  
Turkish Airlines connects you to 290 destinations in 128 countries

## UNWTO COMMENT

Higher food and energy prices result in lower purchasing power and weaker consumer confidence, which could weigh on travel demand in 2023, specially in terms of spending. Travellers may increasingly seek value for money and take trips closer to home in response to the challenging economic environment.

## STRATEGIC LOCATION

## TRANSPORTATION TYPES USED BY FOREIGN VISITORS IN 2022:

1– Airways	% 76,05
2– Roadways	% 20,20
3– Seaways	% 3,71
4– Railways	% 0,04

**2nd**  
Istanbul Airport is the 2<sup>nd</sup> busiest in the world in 2021 in terms of international passengers\*

\* International passengers enplaned and deplaned

## BORDER GATES THAT FOREIGN VISITORS ENTERED TO TÜRKİYE IN 2022:

1– İstanbul	16.018.726
2– Antalya	12.818.472
3– Edirne	4.636.437
4– Muğla	2.989.731
5– İzmir	1.462.458

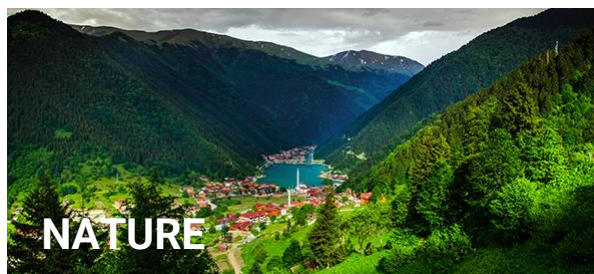




- The United Nations Educational, Scientific and Cultural Organization (UNESCO) has declared 1,154 sites around the world to be of outstanding value to humanity. 897 of the sites are cultural, 218 natural and 39 mixed (cultural and natural).
- Türkiye is home to 19 (17 cultural and 2 mixed) UNESCO World Heritage Sites. Türkiye ranked 16<sup>th</sup> 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.



# 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 3<sup>rd</sup> in the world with a total of 529 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 7400 BCE in Çatalhöyük 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 and gastro 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 160 million in 2019. As international travel has opened, it is projected that Muslim traveler arrivals will reach 140 million in 2023 and get back to 160 million in 2024. The pre-pandemic projection of 230 million arrivals by 2026 will now be reached only in 2028. The estimated expenditure could reach USD 225 Billion by 2028.
- In Mastercard-CrescentRating Global Muslim Travel Index 2022, Türkiye ranked 2<sup>nd</sup> in overall index.
- Newly built medical cities, its numerous hospitals, and high-quality medical services make Türkiye stand out on a global scale.
- In 2022, 1,258,382 patients visited Türkiye for health tourism and received health services. Tourism income from health tourism recorded as 2.119.059.000 USD in 2022.
- The share of health tourism income in total tourism revenues was %1 in 2002. This rate increased to %4.6 in 2022.
- 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's thermal resources rank 7<sup>th</sup> in the world and 1<sup>st</sup> in Europe. Hundreds of thousands of international patients and tourists visit Türkiye's unique thermal facilities every year to get better and healthier. Türkiye is ranked 3<sup>rd</sup> in Europe (after Germany and Italy) in terms of the utilization of its natural thermal resources. It boasts more than 260 thermal facilities established over an area of more than 1,500 thermal resources. In Türkiye thermal cures available almost 300 days in a year. Insurance companies from many Northern European and Scandinavian countries send their patients to Türkiye for thermal treatments as part of their recuperation.



### 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



### Global Top 20 Arrivals Recovery To Pre-Pandemic Levels Overview

Global Top 20	2022 Recovery to Pre-Pandemic Levels	2023 Recovery to Pre-Pandemic Levels	Medium Term Recovery to Pre-Pandemic Levels
Italy			
France			
Spain			
United States			
Hong Kong, China			
Türkiye			
Mexico			
United Kingdom			
Thailand			
Germany			
Macao, China			
China (Mainland)			
Japan			
Greece			
Austria			
United Arab Emirates			
Malaysia			
Russia			
Canada			
Poland			

Pre-Pandemic Levels= 2019. Dark Green= 2022 recovery, light green= 2023 recovery, orange= medium term recovery, red=uncertainty surrounds medium term recovery. Source: Fitch Solutions estimates and forecasts

\*Global arrivals are calculated using data from over 150 of the key tourism destination markets for which data is collected and forecast by Fitch Solutions.

### Key View

KEY FORECASTS (TÜRKİYE 2019-2026)								
Indicator	2019	2020	2021e	2022f	2023f	2024f	2025f	2026f
Total arrivals, '000	45,058.29	12,734.21	24,712.27	29,161.21	40,232.03	45,106.65	45,390.74	45,582.77
Total arrivals, '000, % y-o-y	14.1	-71.7	94.1	18.0	38.0	12.1	0.6	0.4
International tourism receipts, TRYbn	234.98	96.52	236.86	521.18	1,004.14	1,213.03	1,182.21	1,218.83
International tourism receipts, TRYbn, % y-o-y	32.3	-58.9	145.4	120.0	92.7	20.8	-2.5	3.1
International tourism receipts, USDbn	41.42	13.77	26.76	31.60	43.66	49.01	49.32	49.54
International tourism receipts, USDbn, % y-o-y	12.6	-66.7	94.3	18.1	38.2	12.3	0.6	0.4

e/f = Fitch Solutions estimate/forecast. Source: National sources, Fitch Solutions

- According to Fitch Solutions report, in 2022 only Mexico and UAE were expected to show recovery to pre-pandemic levels. Türkiye, Italy, United Kingdom and Austria expected to recover to pre-pandemic levels in 2023.
- Türkiye succeeded to recover to pre-pandemic levels in 2022 by performing same in tourist arrivals as 2019 and surpassing the 2019 performance by 18.9% in tourism receipts.
- According to Fitch solutions key forecasts, Türkiye forecasted to reach 2022 tourist arrivals performance in 2024 and 2022 tourism receipts performance in 2023.



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

THE PENINSULA  
HOTELS



SHANGRI-LA  
HOTELS and RESORTS

ĀMAN

SOHO HOUSE



ACCOR  
LIVE  
LIMITLESS

Marriott  
INTERNATIONAL

Kempinski  
HOTELIERS SINCE 1897

WYNDHAM  
HOTELS & RESORTS

FOUR SEASONS

IHG  
HOTELS & RESORTS

HYATT®

MILLENNIUM  
HOTELS AND RESORTS

RHG RADISSON  
HOTEL GROUP

ADIA

ARTIC | Al Rayyan Tourism Investment Co.  
شركة الريان للاستثمار السياحي

PASHA  
Holding

مجموعة الفردان  
Alfardan Group

HIS

TUI GROUP

Club Med

RIXOS  
HOTELS

RAFFLES  
HOTELS & RESORTS

THE RITZ-CARLTON

Fairmont

INTERCONTINENTAL  
HOTELS & RESORTS

PARK HYATT®

W  
HOTELS

STREGIS

swissôtel  
Hotels & Resorts

JW MARRIOTT

DOUBLETREE  
by Hilton®

GRAND  
HYATT

WYNDHAM GRAND®

SOFITEL  
HOTELS & RESORTS

L X R  
HOTELS & RESORTS

Hampton  
by HILTON

M  
GALLERY

Radisson  
BLU

SIX SENSES

THE  
LUXURY  
COLLECTION

CONRAD  
HOTELS & RESORTS™

Barceló  
HOTEL GROUP

WANDA®  
Hotels & Resorts  
万达酒店及度假村

- 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  
OFFICE**

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