

# turizm aktüel



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TURKEY REVEALS PLAN TO SUPPORT  
BELEAGUERED TOURISM SECTOR

TOURISM SECTOR  
SLAMS COURT VERDICT

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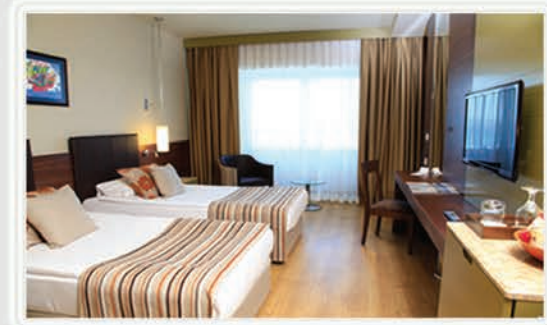
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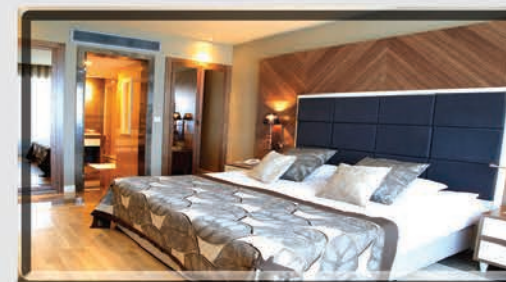
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# A YEAR OF DIFFICULT TESTS

**W**elcome to the Turizm Aktüel ITB Berlin Edition!  
Another year has passed and once again we meet in Berlin, at the  
trade fair making tourism professionals from all over the world meet.

This is the place where we all promote our products, meet each other, learn about  
new trends and keep up-to-date about the aspects of the new season. This is  
where new plans for the future are made. And this trade fair is very important for  
Turkey.

In 2015, much has changed in Turkey but also all over the world. In Turkey change  
has brought negative effects in its wake. It seems that tourism in Turkey has to  
pass through difficult tests once again.

Since many of the fine equilibriums have changed in 2015 and created many  
problems, there is a heavy load which has been left on the shoulders of tourism  
in Turkey. But each bad time has its heroes, and thus we witnessed many people  
who worked hard to promote Turkey abroad against all odds, who tried to keep  
morale up and to motivate others to follow their lead. We want to thank all or  
them from our heart.

Let's admit it, the expectations for tourism in Turkey are not very promising. It  
might be a bit early to be pessimistic, but still, the outlook is not fine. We cannot  
be sure at the moment how things will turn out, but we can be sure that the  
performance of all tourism professionals and of all the sector will play a big role.  
This is the reason why we are all called upon to shape our future actively, to take a  
proactive stance and to work with all our energy.

To give a little bit of information about ourselves: Along with this special edition  
to be presented at the ITB Berlin we have also prepared another special edition  
for the Trade Fair in England. We will represent our branch in Germany where we  
will strive to promote Turkey with our news and editorials. You will find the most  
important and up-to-date news on Turkey and its new hotel investments in this  
edition.

Our next special edition will be published on the occasion of the Arabian Travel  
Market which is held in Dubai in May. We are  
looking forward to meet you there as well soon...

**Hasan Arslan**  
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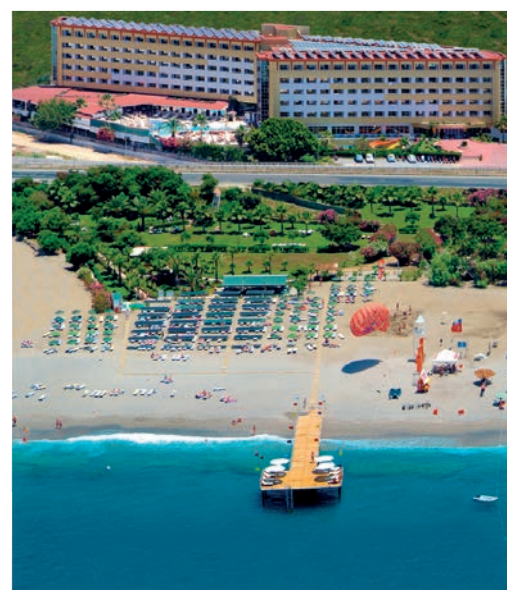


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Prime Minister Ahmet Davutoğlu

# TURKEY REVEALS PLAN TO SUPPORT BELEAGUERED TOURISM SECTOR

Prime Minister Davutoğlu announced the direct grant of TL 255 million in support of the tourism sector, which has been indirectly threatened by lower revenue and political tension in the region.

Prime Minister Ahmet Davutoğlu said the government will grant TL 255 million (\$86.6 billion) directly to the tourism sector in accordance with the Tourism Action Plan that he announced at Çankaya Palace in Ankara on Monday. According to the plan, accommodation fees paid for accommodation facilities that are approved by the Culture and Tourism Ministry will be postponed for six months and split into three installments in 2016. The tourism support package contains more compensatory measures as well. Moreover, the Culture and Tourism Ministry is also working on long-term structural measures, and a campaign will be initiated to spur early bookings for domestic tourism.

Referring to the fact that Turkey is the 17th-largest economy in the world, Davutoğlu said Turkey will not retreat into

its shell in the face of the fire that is terrorizing the Middle East. Instead, it will extend open arms to the world, as the Turkey is an integral part of the world. Davutoğlu added that no one should expect Turkey to change its axis, stressing that Turkey has an open-door policy and is aware of its power and potential. Emphasizing that it is wrong to use tourism as a sanctioning tool in reaction to problems between states, Davutoğlu said tourism is a very vulnerable sector. According to Davutoğlu, Turkey ranks sixth in the world and fourth in Europe in terms of the number of tourists it attracts annually; therefore, using tourism as a tool for manipulating investments is wrong.

The prime minister also said the government will grant \$6,000 per flight to A-group tourism agencies that transfer tourists to certain airports in Turkey. The

application will apply to tourism agencies that carry foreign tourists to six airports across the country. Also, the debts held by tourism companies will be restructured as deemed necessary. Sea tourism facilities will also be included in the scope of the agencies. In response to questions regarding the recent terrorist attacks in Turkey and their potentially negative impact on the tourism sector, Davutoğlu said there has not been a notable decline in the number of tourists due to security concerns. "We are taking preventive measures and already support the tourism sector. We do not expect shrinkage in the sector. There is dark propaganda targeting Turkey. We need to let the world know that Turkey is a safe and democratic country," he added. The prime minister also said the government has allocated a high and specialized budget for

tourism activities this year and boosted promotional campaigns.

The cost of the incentives that will be provided for the tourism sector will be covered through the reserve allocation of the Finance Ministry and will not pose an additional burden for the economy, according to Davutoğlu. He added that Turkey is changing its approach to tourism, which is currently dependent on a few lone countries but aims to attract tourists from various countries. According to the action plan, the construction of a marina in Istanbul was cited as one of the structural measures.

In reference to a December 2015 meeting during which the problems facing the tourism sector were discussed, the prime minister said the motto, "Turkey: Discover your power," was the overarching goal of the agenda. "This is the key phrase of the 'Turkey' brand," Davutoğlu said. "Our stance and self-confidence determine our social, political and individual lives. Our attitude in the face of terrorism and disasters as well as our dignity is determinative. This is why I stress the importance of self-confidence on all occasions. Considering the current state we are in, I reiterate that self-confidence - namely, maintaining

a firm stance - are more important than anything. Self-confidence means discovering one's strength, potential and capacity. It also means gaining the confidence of others, thinking together, listening to each other and respecting others' views. This is the source of our strength," the prime minister said. He stressed that countries that have lost their self-confidence do not have the power to make breakthroughs and conduct reforms as a result.

Davutoğlu also said that thus far, the ruling Justice and Development Party (AK Party) government has overcome internal and external problems as well as global crises through confidence, stability and the national will, adding that Turkey created 6.5 million jobs despite the 2008 financial crisis when even the strongest European countries went bankrupt.

Emphasizing that the AK Party has made significant breakthroughs in almost all fields during its rule - namely, in per capita income, export capacity, congressional tourism and tourist numbers - Davutoğlu said the government will continue to boost growth and development. "As we rely on the national will, we will continue to set Turkey into motion and continue achieving the revolutionary creation of new jobs as we have seen over the past 14 years despite all the problems surrounding us," he concluded







# ISTANBUL RANKS NINTH IN WORLD'S TOP DESTINATIONS LIST

Istanbul took ninth place, and Antalya was ranked 11th in Euromonitor's "Top 100 City Destinations" list, a report which monitors the number of international tourist arrivals has said.

Artvin, a Black Sea destination in Turkey's northeast, was placed at number 100 in the list, which was released Jan. 29. Wouter Geerts, a travel analyst at Euromonitor in London, noted that top cities like Istanbul and Antalya saw increased tourism in 2014 despite geopolitical tensions. He attributed the positive performance to continuing economic growth at key destinations. "Arrivals continued to grow in global urban centers in 2014, illustrating the economic importance of tourism to the world's cities," Geerts said. Hong Kong remained number one in the ranking, as it has been for the past five years, according to the report.

Istanbul moved up two places to enter the top 10 at number nine, registering a 13.2 percent increase in the number of visitors to 11.8 million in 2014. The report noted that an increasing numbers of visitors are coming to Istanbul from the Gulf and other Arab states.

Antalya attracted 11.1 million tourists to its luxury resorts and famous beaches. Artvin pulled in 1.8 million tourists in 2014, just behind Taichung in Taiwan



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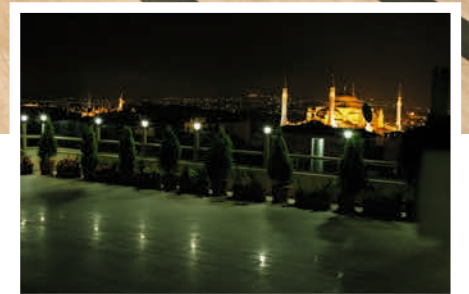
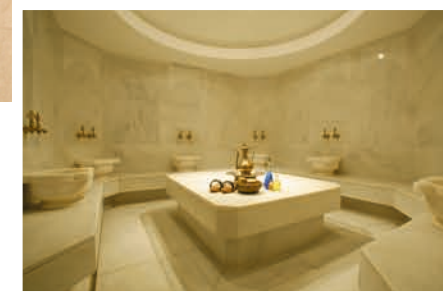
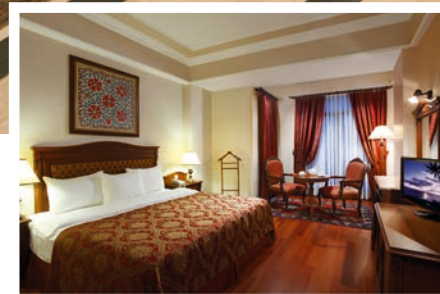
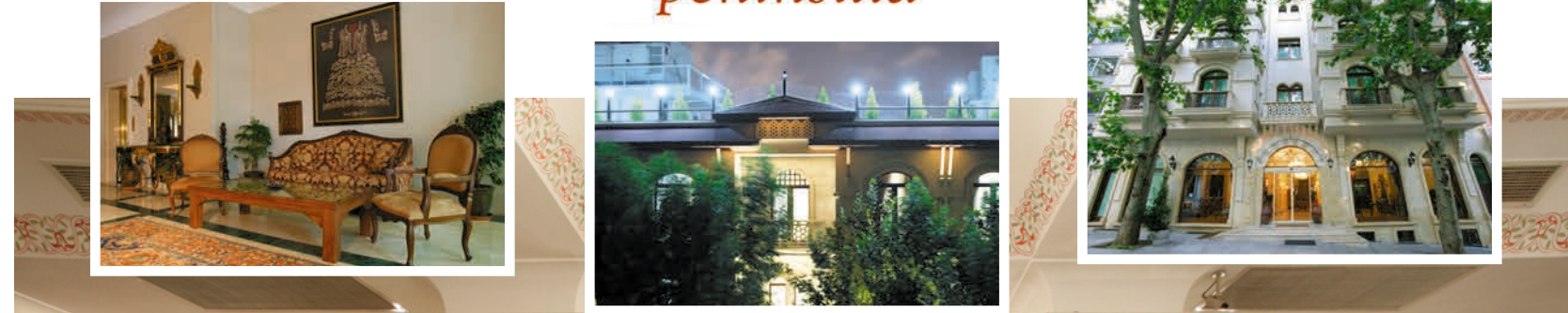
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# TOURISM SECTOR SLAMS COURT VERDICT

The German travel industry has strongly criticised a court verdict on hotel contracting that could cost tour operators millions in back-dated taxes – and possibly even force them to move abroad.



In a long-awaited preliminary verdict on corporate taxation, the financial administration court in Münster has ruled that hotel capacity contracted by tour operators to create holiday packages should count as property rental similar to office buildings or production facilities, and thus be liable to corporate taxation.

However, only the basic rental cost should be liable to taxation and not any additional costs such as heating, electricity, water or cleaning. Moreover, the ruling only covers accommodation in Germany and not in any other country, a court spokesman clarified.

The court found in favour of local tax authorities and against locally-based tour operator Frosch Sportreisen, which had taken legal action over the issue which dates back to a new law introduced in 2008. The company had argued that contracted hotel capacity was a service just like flights and airport transfers that

was required to create a holiday package, and could not be seen as property rental.

The Münster court ruling is not the final word, however, as it granted the right to appeal to the federal financial administrative court over the issue. However, any decision on an appeal could take up to five years, the travel industry fears.

In response, both the German Travel Association (DRV) and the German Tourism Association (BTW), whose members include hoteliers, criticised the verdict as “completely unrealistic and impractical”.



Norbert Fiebig (DRV), left, and Michael Frenzel (BTW)

They demanded a ‘political’ solution with a change in the law to avoid years of uncertainty until the higher court takes a decision.

The DRV described the verdict as “disappointing” and declared that contracted hotel accommodation could not be compared with rented office space or production facilities. “If the verdict is confirmed at a higher level, then it would mean that a rental element would have to be calculated for every hotel in the world offered by a tour operator,” DRV president Norbert Fiebig said. This would be “a bureaucratic monster”.

According to DRV calculations, the German travel industry - primarily tour operators - face potential back-dated tax demands of €1.6 billion, with additional annual costs of €230 million. The DRV already warned ahead of the court hearing that tour operators might be forced to relocate hotel capacity procurement departments outside Germany to avoid these tax payments.

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# TOURISM GIANT SAYS BOOKINGS RECOVERING AFTER SECURITY CONCERNS

**Thomas Cook Group**



Tourism group Thomas Cook said bookings were recovering after customers delayed making holiday plans following terror attacks in Paris last November and in Istanbul in January, which has caused demand for trips to Turkey to plunge.

Last year there were also terror attacks in Egypt and Tunisia, making tourists wary of those previously popular winter sun destinations, and Thomas Cook said it was offering more holidays in Spain, Cyprus, Bulgaria, the U.S. and Cuba as alternatives.

For the summer, when Thomas Cook makes all its profit, customer security worries had so far dented bookings, the company said, with its program 29 percent sold, 2 percentage points lower than where it stood at this time last year.

Shares in the company dipped 3 percent to 93 pence, slightly lagging a 2 percent fall in the British midcap index.

But the company said it was experiencing a later booking pattern and that demand



Peter Fankhauser

for holidays overall was strong, and as such it would stick with its annual guidance provided that the recovery experienced in recent weeks was sustained.

Turkey had last year accounted for about a fifth of Thomas Cook's business on a number of guests basis, but the company had cut its capacity in the country by 29 percent to account for the drop-off in demand following the death of 10 German

tourists in after a suicide bomb in Germany's biggest city on Jan. 12.

The firm's bigger rival TUI Group on Feb. 9 reported a 40 percent drop in bookings to Turkey for this summer due to safety concerns and said it was investing in Cape Verde and Bulgaria as alternatives.

Thomas Cook said that in Europe people still wanted to go on holiday and with continued nervousness about travel due to heightened geopolitical uncertainty, they were more inclined to travel with a tour operator.

"The feedback out of customer research is that they feel safer in the hands of a package operator," CEO Peter Fankhauser said.

The consensus forecast for Thomas Cook's core earnings (EBIT) currently stands at 347 million pounds (\$501 million) according to Reuters data, representing a 12 percent rise on last year's result.

The company was only seeing a minor impact in terms of customers seeking to re-book away from the Caribbean as a result of the Zika outbreak in the Americas.



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**S**pa Hotel Colossae Thermal Hotel is located on land of generous of Turkey. Turizm Aktuel interviewed with Şeref Karakan General Manager of the Hotel from the opening of the hotel 1993.

**We would like hear opening story of Spa Hotel Colossae Thermal Hotel?**

Spa Hotel Colossae Thermal hotel was the first five star Hotel in the region which was opened in 1993. After a couple of years in 1997 the Hotel opened health center by completing documents from the Ministry of Health in order to operate as Thermal Hotel establishment. In 2004 , we added a soccer stadium for our multi sport activi-

ties which we realised opening with the ceremony National Soccer team. In our Health Center , the Hotel has been given the services of a number of different massages, herb baths, peeling, skin and body cares packages which supplies to their guests in order to purify the guests stress. In 2010, the Hotel was totally renovated and continues to give services today's modern face. The Hotel continues to get all the certificates like Green Star License in 2013 from the Ministry of Culture and Tourism of Turkey. Beside this, the Hotel just opened a helicopter landing field for their guests.

**Spa Hotel Colossae Thermal Hotel is located in a special location. Could you**

**tell us more about the advantages of this region to your guests?**

Our Hotel is not just offering accommodation comfort to our guests. There is also possibility to see the historical sites of the region. Like the miniature image of Pamukkale of Kaklik Cave, one of the famous seven churches of Little Asia Laodikya, Aphrodisias was named after Aphrodite, the goddess of love, ancient ephesus which covers one of the ancient wonders of the world named Artemis. Besides this, Buldan and Babadagli Business Center and within the Old city culture, handicrafts and special weaving.

**Do you have care units within the Hotel?**

Within the Hotel; it exits Health Center Complex specialists with the certificates from the Ministry of Health, thermal pools, private thermal baths, sauna, Turkish bath, jacuzzi, steam baths, fitness hall, semi Olympic open pool, soccer, volleyball, basketball area, squash, tennis court, billiard, ping pong, trekking, jogging areas for sporting activities.

Health care programmes are applied after the doctors check ups at Health center for the applications of massage types, mud therapy and also exercises. Anti stress programmes are the major and mostly used when you think of a number of care programmes.



Şeref Karakan always kept Spa Hotel Colossae Thermal at its success position since 1996.



Spa Hotel Colossae Thermal Hotel is not only serving accommodation comfort and also giving an opportunity to visit historical sites of the region.



# TURKEY'S FIRST TOURISTIC SUBMARINE TO HOST VISITORS

One of the alternative ways to attract domestic and foreign tourists, Turkey's first submarine will be hosting visitors for a touristic trip in the southern province of Antalya as of April.



As Turkey seeks to support its tourism industry amid continued regional problems, one Antalya-based firm has hit upon a novel idea to keep people coming to the coast: A 48-seat submarine. Guests from around the world could soon be speeding through the Mediterranean Sea at 130 feet below the waves in "Nemo," a craft built in Finland and renovated in Spain. The chairman of IHS Travel and Touristfly, the company behind the ambitious \$4-million scheme, told Anadolu Agency that they "wanted to bring a new and different alternative to the sector and this project came to our minds."

"I believe it will revive the tourism industry. We are very hopeful about the project," said Yunus Emre Yavuziğit.

The guided underwater tours could start in April from the coastal city of Alanya.

The underwater adventures will continue throughout 11 months of the year and the company plans to enlarge the underwater tours over the coming years.

"We plan to buy more submarines to start tours in the Aegean and the Marmara Sea as well in 2017," added Yavuziğit.

The project comes as Turkey witnesses a decline in the number of foreign visitors from Russia and Europe in 2015. According to data released by the Tourism Ministry last month, foreign tourist arrivals dropped by around 1.61 percent compared to the same period of 2014.

Antalya was one of Russian visitors' most popular destinations until Turkey downed a Russian warplane on the Syria border on Nov. 24 last year. After the subsequent diplomatic row, Russian tourist arrivals have dropped significantly. According to the ministry's figures, the number of Russian tourists coming to Turkey fell by 47 percent in December 2015 compared to the same period of the last year.

Last month's terror attack that killed 11 German tourists in Istanbul's Sultanahmet district has also prompted jitters in the industry.

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# ANTALYA SEES RECORD LOWS IN RUSSIAN TOURISTS WITH 81 PCT DECREASE

The number of Russian tourists visiting Turkey's top holiday resort town of Antalya decreased by 81 percent, as their numbers plummeted to 2,427 in January from 12,870 of January 2015 while the total number of tourists visiting the city in January decreased 17 percent, according to official figures.



**N**umbers also showed that only a total of 97,601 tourists visited Antalya in January, the lowest for January in the last decade.

Antalya hosted some 135,010 tourists in January 2006 and 125,446 in January 2007. It saw its highest turnout in January 2008 with 140,306. In January 2009 and January 2010, Antalya received 106,539 and 140,019 visitors, respectively. After 2010, the number of tourists visiting the city reached a stable level, with 126,272 tourists in January 2011, 122,314 in January 2012, 111,485 in January 2013 and 116,974 in January 2014. Last January, Antalya's total visitors stood at 117,746.

Antalya gathers millions of local and international tourists each year, with its luxury hotels usually overbooked especially in



the summer seasons. Meanwhile in winter, tourism slows down due to dropping temperatures. The Russian market experienced the largest decrease in the number of tourists visiting the city in January 2016, as Russia ranked 5th in 2016, compared to 2nd in 2015 in terms of countries with the highest number of visitors to Antalya.

Turkey was Russia's number one foreign tourism destination for years but this came to an abrupt end following the shooting down of a Russian military plane by Turkish jets on the Syria-Turkey border on Nov. 24, 2015. Upon the incident, Russia imposed economic sanctions against Turkey and travel restrictions on Russian tourists visiting Turkey.

Turkey's tourism industry also expects to see losses in other markets this year

after an Islamic State of Iraq and the Levant (ISIL) suicide bomb attack in Istanbul's top tourist spot Sultanahmet, which killed 11 German tourists on Jan. 12, highlighted security concerns for tourists planning to visit Turkey.

The loss in the German market stood at 16 percent as the number of Germans visiting Antalya decreased to 44,262 in January 2016 from 52,731 in January 2015. While Germans took the top spot for tourists in Antalya, the Dutch followed second. However the Dutch market has also decreased by 20 percent compared to 2015, as this year's January number fell to 4,544 from 5,688.

The number of Israeli visitors saw a 122 percent increase, bringing it to third. In January 2016, the number of Israeli tourists

visiting the city reached to 4,475, a huge leap from 2,008 visitors in January 2015.

Britain came fourth with a 14 percent decrease as Antalya only hosted some 2,965 English tourists in January. British tourists mostly like Antalya for its luxury golf club resorts in the Belek region of the province.

According to the statistics of Antalya's provincial directorate of culture and tourism, among the 38 countries that send tourists to Antalya, only nine surpassed their January 2015 numbers. However, the surplus in the number of tourists arriving from these nine (which included Israel, Ukraine, France, Czech Republic, Hungary, Slovakia, Estonia, Serbia and Syria) covered only 30 percent of the loss caused by the decrease in the Russian market.

# TURKEY RECEIVED MOST TOURISTS FROM GERMANY IN 2015

The number of foreign visitors visiting Turkey in 2015 decreased only slightly compared to tourist numbers for 2014, despite terrorist attacks targeting the country's stability, along with threats and crises from the surrounding region. According to data compiled by state-run, and figures from the Ministry of Culture and Tourism, 36.2 million tourists visited Turkey in 2015, marking just a 1.61 percent decrease compared to 2014.

Following a pattern established over the previous two years, the largest number of tourists to Turkey from a single country were Germans with 5.6 million, an increase of 330,000 visitors over the numbers for 2014. The number of German tourists visiting Turkey has increased by nearly 10 percent since 2013. German tourists are thus important to Turkey's tourism sector and economy, and this helps to explain why German nationals were deliberately targeted in the suicide bombing that took place on Jan. 12 in Istanbul's landmark Sultan Ahmet Square, where 11 elderly Germans were killed.

Russians and British tourists followed Germans with approximately 3.6 million and 2.5 million visitors, respectively. The total number of visitors decreased by 593,000 compared to 2014. Analysts blame this drop on deterioration in the Russian economy and the renewal of armed clashes between Turkish security forces and the PKK terror organization in southeastern Turkey. The decline in tourist revenues was greater than the decline in tourist numbers, due to the weakness of the Turkish lira relative to the dollar and euro, marked by an 8.3 percent decrease for a total of \$31.464 billion. Of this revenue, 81.3 percent came from foreign visitors spending an average of \$756, while the rest was from Turkish ex-patriates, spending an average of \$970. The number of visitors from Russia is expected to continue decline due to ongoing tensions between Russia and Turkey, after the Nov. 24 incident in which Turkish F-16 jets downed a Russian Su-24 bomber for violating Turkey's airspace. Moscow has implemented sanctions on Turkish goods and refused work permits for Turkish workers, and the Russian government has also called on its

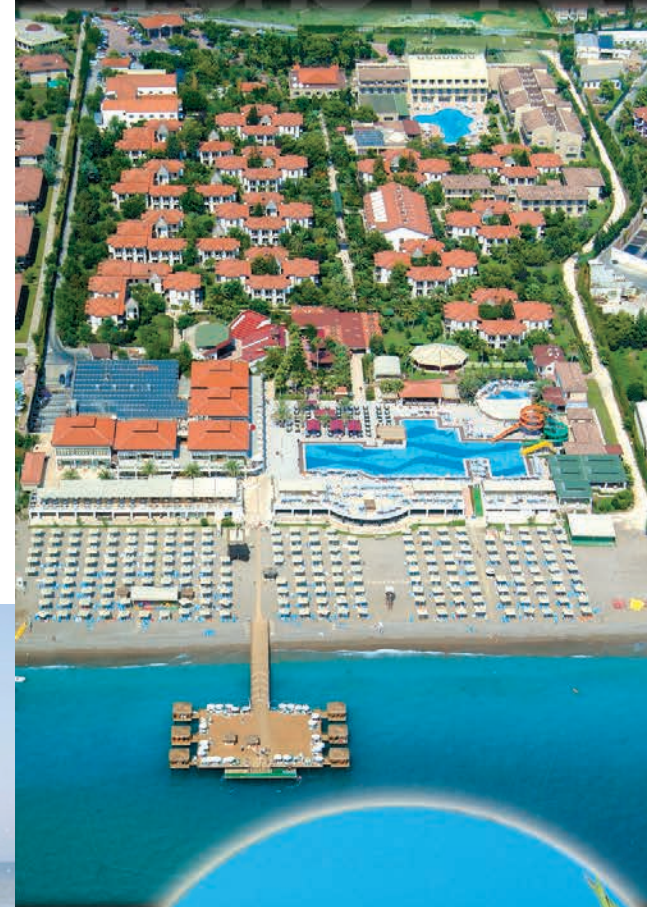


citizens to not travel to Turkey, despite the attraction of its warm beaches. The number of Russian tourists visiting Turkey plunged 46.9 percent in December 2015, dropping to 25,485 in December 2015 from 47,954 in the same month of 2014.

However, the number of tourists visiting Turkey from more than 40 other countries increased in 2015, including major

markets like China and the U.S., along with Iran, from where many more visitors are expected as the Iranian economy should benefit from the lifting of nuclear sanctions.

Istanbul was the main gateway for foreign tourists with 12.4 million arrivals in 2015, followed by Antalya with 10.9 million, Edirne with 3.2 million, Muğla with 2.9 million and Artvin with 2 million.



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# TOURISM ANALYSIS 2016

Germans took fewer holidays last year for the first time since 2010 and there could be a further downturn this year, according to a major annual consumer survey.



In 2015, only 54% of Germans took a holiday of five days or more, compared to 57% in 2014 and 2013, the annual Tourism Analysis by the Hamburg-based research organisation Stiftung für Zukunftsfragen ('Foundation for Future Studies') found. The figure is based on a nationwide survey of 4,000 adults by market researchers GfK.

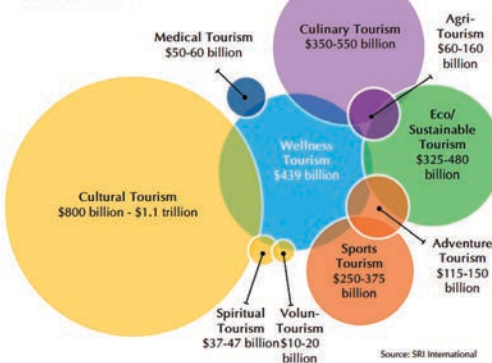
This was the first drop in German travel intensity for five years. "Many Germans are increasingly worried and are questioning the most important condition for a holiday: safety in the destination," commented Ulrich Reinhardt, scientific head of the foundation. Notably, the proportion of people over 55 who took a five-day holiday dropped by six percentage points to 48% but the number of 35-54 year-olds who went on a five-day trip increased by two percentage points to 61%.

The outlook for 2016 is no better, according to the survey results. Asked about

their travel plans for this year, 21% said they are not making any travel plans at all. This is two percentage points more than last year. The number of 'undecided' consumers lay at 37%.

"The pessimism about the future could lead somewhat fewer Germans than usual this year to leave their usual surroundings for at least five days. That suggests that travel intensity in 2016 will not reach the

Global Tourism Industry  
\$3.2 trillion



level of last year," the survey authors wrote.

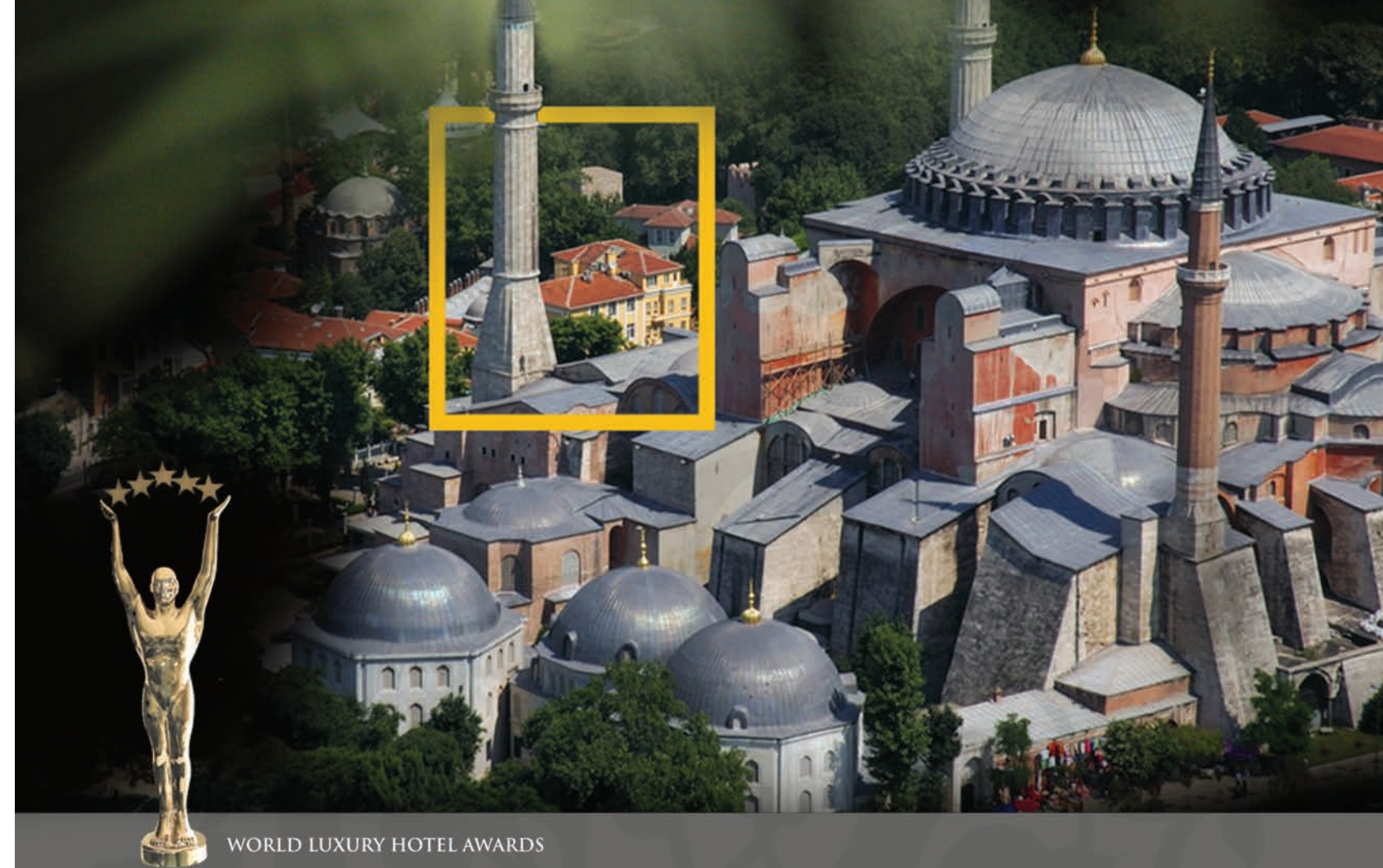
More positively, the average length of a trip actually increased in 2015, for the first time in many years and after a steady reduction over the last decade. The average holiday lasted 12.6 days last year compared to 12.1 days in 2014. According to Reinhardt, "many Germans don't want to cut their holidays any more. Instead they are saving on transportation or accommodation costs and are spending less at the destination, rather than having less time there."

Among other findings, the Tourism Analysis showed that the average holiday cost increased to €1,109 per person last year from €1,071 in 2014.

In terms of destinations, Germany retained top spot in 2015. Among foreign destinations, Spain remained number one ahead of Italy, Turkey, Austria and France. Asia was the top long-haul destination region, followed by North America and North Africa.

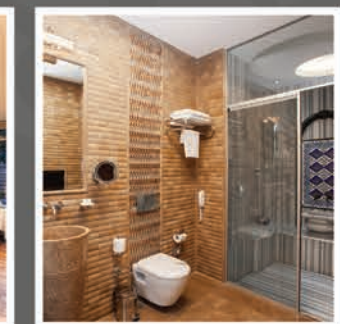
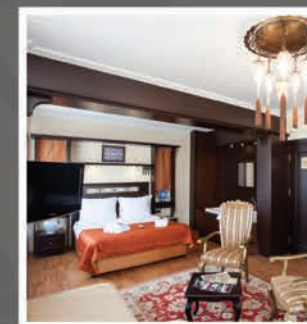
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TUI CEO Fritz Jousen



# Higher **Germany** profits target despite Turkey bookings slump

TUI is hoping for better profits in Germany this year despite the impact of lower bookings for Turkey, Egypt and Tunisia on the performance of the group's largest source market.

Europe's top tour operator has a group-wide 40% slump in bookings for Turkey at present and expects customer volumes for the destination this year to halve from the 1.9 million carried there in 2015 in the aftermath of the Istanbul terror attacks. Egypt and Tunisia are also well down on last year as consumers avoid the two North African destinations.

But with strong demand for Spain TUI is stressing that it can cope with a large-scale customer switch to Western Mediterranean and other alternative destinations. The group has reduced risk capacity in Turkey and increased contingents in Spain and other destinations instead. CEO Fritz Jousen declared: "Our own hotels in destinations outside Turkey, such as Spain and the Canaries, are profiting from the shift in demand."

In the October - December 2015 first quarter, the Central Region, dominated by the large German market, saw a 2.9% drop in customer numbers but a 3% rise

in revenues due to more long-haul bookings. However, the seasonal loss widened to €26.2 million from €20.3 million one year earlier as a result of "challenging trading conditions and weaker demand for North Africa and Turkey as well as lower Canaries margins". TUI Germany currently has a 3% drop in customer numbers for winter 2015/16 but sales are up by 2% due to higher prices. Detailed trading figures for summer 2016 were not disclosed.

However, Jousen underlined that Germany is expected to improve its profits this year despite the higher Q1 loss. "But I've always said the repositioning in Germany is a process of 3-5 years," he emphasised at this week's shareholder meeting in Hanover.

Overall, TUI Group increased Q1 revenues by 5.4% to €3.7 billion, driven mostly by the Northern Region (UK, Nordics), and the cruises and hotel divisions, while the seasonal loss was slightly reduced to €102 million.

At group level, winter 2015/16 bookings are flat but average selling prices are 3% higher, driven by solid growth in the UK and cruises. Summer 2016 bookings are 1% higher and prices 2% higher, also with good growth in the UK while Germany and the Nordics have been more significantly impacted by the drop in demand for Turkey.

Jousen stated: "We have delivered a good start to the new financial year, despite the backdrop of geopolitical turbulence in



some of our destinations. As an integrated tourism group, TUI is strategically well positioned to tackle the challenges in this turbulent market environment. Our global presence in the destinations, our existing capacity and our own hotel and cruise content enhance the resilience of our economic position. Customers benefit from our business model thanks to comprehensive advice provided during the booking process

and personal support offered in the destinations. This service has again given us a competitive edge over pure online providers, in particular during more turbulent times. "Based on current trading and due to the resilience of our integrated business model, we remain convinced that we will be able to deliver the announced underlying EBITA growth of at least 10% in the full financial year 2015/16," he concluded.





# DELPHIN IMPERIAL SWIMS TO THIRD PLACE IN TURKEY

The Delphin Imperial hotel in Lara on the Turkish Riviera was a winner in the latest fvw Hotelometer ranking of German holidaymakers' favourite hotels in Turkey, Spain and Greece.

The hotel jumped from seventh to third place, behind the Aydinbey Kings Palace and the Royal Dragon, in the overall ranking for Turkey in the fortnight from January 11 - 24. New in the top ten ranking were the Delphin Palace and the Grand Hotel Artside.

Families were most interested in the Aydinbey, the Primasol Hane and the Royal Dragon while most enquiries from couples were once again for the Aydinbey, the Adalya Ocean and the Commodore Elite Suites, according to the fortnightly ranking. In Spain, the Labranda Bahia de Lobos moved up to third place behind long-standing number one, the Lopesan Costa Meloneras, and second-placed Sotavento Beach Club in the overall ranking. In the family ranking, the Sotavento Beach Club, the Iberostar Club Cala Barca and the Blau



Punta Reina in Cala Mandia (Porto Cristo) were the top three. Most enquiries from couples came for the Lopesan Costa Meloneras, the Sotavento Beach Club and the Labranda Bahia de Lobos.

In Greece, the Apollonia defended top spot ahead of the Lyttos Beach and the Ikaros Beach in the overall ranking. In the family ranking, the Apollonia, the Lyttos Beach and the Lindos Princess Beach remained the top three hotels. Most enquiries from couples went to the Ikaros Beach, the Apol-

lonia and the Kernos Beach in Malia.

The fvw Hotelometer is a fortnightly ranking of the most popular tourist hotels in Spain, Turkey and Greece, based on all enquiries in the Traveltainment reservations system used by German travel agents and online booking engines. The data, supplied by IT company TrevoTrend and split into different categories (overall, families, couples, singles and star ratings), thus reflect demand trends but do not show actual bookings.



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# 'DEMOCRATIC VALUES KEY' AS DARK CLOUDS GATHER OVER TURKEY'S TOURISM

Amid dark clouds over the tourism sector, Turkey needs to improve its image abroad in order to overcome difficulties it will face over the next two years, Turkish Hoteliers Federation head Osman Ayık. 'Turkey needs to show it is different to other countries. It must improve its image regarding universal values,' says Ayık **BARÇIN YINANÇ**

Turkey has started to be perceived as a "typical Middle Eastern country," posing problems for its troubled tourism sector, Turkish Hoteliers Federation head Osman Ayık has told the exclusive interview.

"Turkey is the most distinctive country in this region and it has been respectful of the universal values. It must improve its image regarding universal values," Ayık said.

**How do you see 2016 in terms of tourism?**

Even before the downed jet crisis with Russia and the terrorist attack in Istanbul's Sultanahmet, we knew we would have a very difficult year in 2016. Last year's attacks in Paris and Ankara have had a very negative effect on people's travel habits. They are less willing to travel from one place to the other. Nowhere is safe. Terror can hit anywhere and therefore all countries need to address this issue.

With 40 million guests Turkey ranks in the top six tourist destinations in the world. Some 55 percent of its tourists come in an organized way, either through travel agencies or tour operators. This is a huge industry and we are only behind Spain

in receiving the most tourists via this organized travel. Organized travel is a huge industry with thousands of agencies, charter planes and hotels accounting for 10 to 15 million people every year. Turkey is one of the most important countries feeding the industry. With such a huge integrated system you cannot just suddenly turn the engine off. If the system stops you will end up having thousands of unemployed people. So we need to overcome the difficulty of



Turkish Hoteliers Federation head Osman Ayık

working within these structures.

But the problem for 2016 and beyond is to rid people's minds of these recent terrorist acts. We need to get back to a stable and peaceful environment, otherwise the global travel industry will be seriously affected. The source of the problem needs to be tackled.

**But that can only happen with measures taken by all countries on an international level.**

If we are to talk about tourism measures to be taken in Turkey, first of all the actors who are stakeholders in the sector obviously can't give up on Turkey easily. But we need to take action to strengthen the hands of these stakeholders. Obviously the government has taken steps like providing credit and cash support to charter firms, and organizing PR campaigns. These might look sufficient in the short term, but we need measures for medium and long-term. We need a very serious PR campaign showing another side of Turkey to world public opinion. Like it or not, there is a situation that has pushed us into a track and we need to get out of this situation very quickly.

**What is that track?**

Turkey has started to be perceived as a typical Middle Eastern country, a typical Islamic country. This is a problem for us.

**Why?**

We seem to be engaged too much in certain things, in terms of international and regional politics. This is problematic. We are the most distinctive country in this region. We are different from all our neighbors and we should not resemble them; on the contrary, they should resemble us. They used to envy us, so we should not aim to be like them.

Events in Tunisia, Egypt, and other Islamic countries have led to a perception disruption. Turkey is a Muslim country, but it can be loyal to universal values. Turkey has always been respectful of universal values and it continues to be so, but we need to explain this in a much clearer way to the world public. We need to explain in a better way so the difference between us and other countries around us becomes crystal clear. We are the country with the longest democratic experience in the region.

**You seem to see a direct correlation with the level of a country's democracy and its potential to attract tourists.**

It must be like that because tourism flourishes only in environments of peace.

That's why Turkey has been a destination of choice until now.

**So do you agree with certain people who have called on the government to reset its Syria policy, for example?**

Our job as a federation is not politics. We are doing technical work and we should not get involved in things outside our area.

Turkey has done something that no other country has done: It has taken in three million Syrians. But even that was not properly explained to the world. All these things have consequences. For example, a lot of people have stopped wanting to go to the Greek islands because of the refugee crisis.

**But if you were to complain about this to the government, the answer would be: "What else should we have done, leave them to their deaths?"**

We aren't saying we should leave refugees to their death. But we should make a call to the world. This is not a problem Turkey can solve on its own.

**But what should be done to change the perception?**

Turkey is the most distinctive country in this region and it has long been respectful of universal values. Turkey needs to change its image over these universal values.

**By universal values, you mean democracy and freedoms?**

All rights and freedoms, everything. There is no need to count them one by one.

**Shouldn't the tourism industry draw certain lessons as well? We used to criticize the energy sector for being dependent on the Russians but it seems Turkey's tourism industry is also dependent on them?**

That's not the case. When our federation set out in the 1980s, we saw tourism as a lever for development and for that we opted for mass tourism. In 35 years we did indeed create a great value sector, worth \$80 billion. Some years the tourism industry has grown by double digits and so far this is a success story. But at one stage we should have perhaps stopped for a moment and evaluated the situation, questioning whether we would be able to continue at that pace. Perhaps we should not have put all our apples into one basket.

But it is not so simple; we also have tourists coming from Europe. It is only in the last 20 years that we have reached the 4 million numbers from Russia.

Still, another mistake we made was about the composition of the product. We made a huge jump in favor of the all-inclusive holiday system in Turkey and now there is a perception that the best all-inclusive holiday you can get is Turkey. That's important, but it also creates a problem. We need to think about problems with the perspective of the 2023 targets, which aim for 50 million tourists every year. Can we reach that figure? Of course we can. I think our difficulties will only go on for two years.

**What needs to be done in the short term?**

The sector needs to be protected for these two problematic years. We have been talking to banks, asking about reorganizing short- and long-term credit. Also, the planned increase in the minimum wage will bring a huge burden to the sector, as we are a labor intensive sector and half of our expenses already go on personnel. We have been asking for an exemption to the minimum wage rise.

Domestic tourism also needs to be revived. At the moment there are 8 to 10 million people in Turkey travelling abroad.

In the long term we need to start addressing the legal framework. A law passed in 1982 introduced one or two small changes, but we need a new law written with a new perspective to serve as our new road map.



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# GERMANS ARE LOOKING BUT NOT BOOKING

Consumers in Germany are making plenty of holiday enquiries at present but are not following through with actual bookings, according to new figures.



Overall interest in holidays is surprisingly higher at present than at the same time last year, according to analysis by data experts Trevo Trend of customer enquiries in German travel agencies and on booking portals in the week of February 11-17 for holidays up to mid-September.

For 26 of the 30 weeks during this period the volume of enquiries is higher than for the equivalent weeks last year. Enquiries for trips in May and June are even well ahead of the same period in 2015.

But this interest is not being converted



into bookings, as recent figures confirm. In January, for example, sales revenues dropped by 12% year-on-year, according to market researchers GfK.

The low booking trend was confirmed

by figures from leading hotel evaluation portal Holidaycheck based on its website traffic over the past three months. Tunisia had 63% less traffic and 47% fewer bookings, Egypt was down 30%, and bookings were also lower for Tunisia. In contrast, bookings for Bulgaria are 72% higher, and Spain and Portugal are up by 40%, it said.

These trends were supported by the results of a major survey of some 3,300 users of the Holidaycheck portal. This found that 76% of customers are worried by the wave of terror attacks which are impacting on their travel planning. As many as 90% of users described beach regions in Egypt and Tunisia as unsafe or very unsafe, while 59% believed package holiday destinations in Turkey were not really or not at all safe.

In contrast, the Caribbean, the USA and European destinations such as Croatia, Bulgaria and Greece were perceived as safe, while opinions were mixed about destinations such as the UAE, Indonesia, Thailand and Mexico.



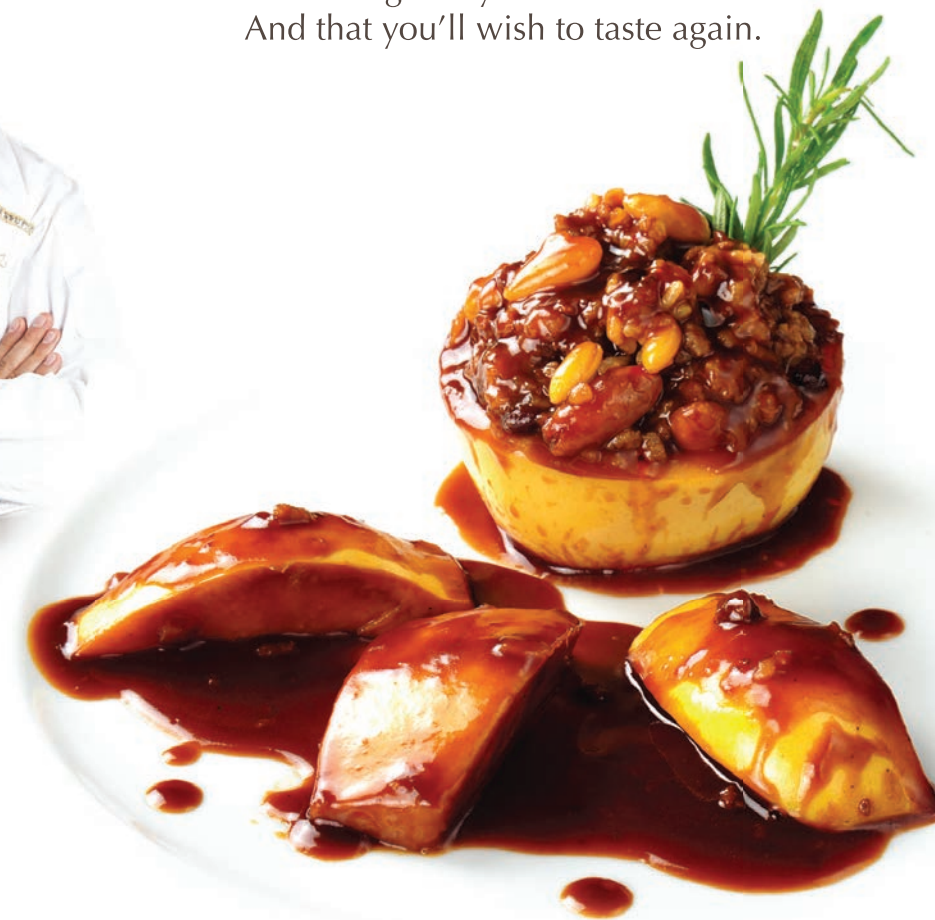
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# 2016 TOP 10 HOTEL INVESTMENT TRENDS

Think London and, yes, Louisville, as well as customized deals. The net result? Another banner year. **ORIANA LERNER**



Hotel guests want to have everything their own way. Why shouldn't hotel investors? Personalization, customization and curation are take-it-for-granted parts of everyone's lifestyle. For 2016, this kind of self-selection means that micro will be the new macro for deal making. There will be less of a herd mentality than ever before as cashed up funds, institutions and high net worth individuals match opportunities with their individual risk profiles and hurdles. And, that's going to mean not only a broader global transaction picture for the next 12 months, but a more robust deal pipeline as well. The new filters for investment are creating new investment trends. Here are 10 strategies that will shape the hotel investment landscape for 2016.

## ONE EVEN WITH A SLOWING ECONOMY, CHINA IS STILL THE BIG STORY.

That's as true for the capital that's driving hotel development within this massive

market as it for the funds flowing into assets worldwide. Some of the money is backing local players such as Wanda Hotels & Resorts and Home Inns & Hotels, but the international giants are still reaping huge rewards in growth terms.

Hilton Worldwide is one that's going full throttle. "As far as rising markets, we're seeing great growth in Asia where we have 240 properties, with more than 67,000 rooms in the pipeline," says Christopher Nassetta, CEO, Hilton Worldwide. "Approximately 80% of these pipeline rooms are located in China, and we continue to see great potential in the country. In fact, we expect to sign more deals this year than last in China as our mix shifts more toward our focused-service brands."

Chinese investors are also giving strong backing to Wyndham Hotel Group. Chip Ohlsson, executive vice president and chief development officer, North America, Wyndham Hotel Group, agrees as the company just signed its 1,000th hotel in China in January 2016.

But, the China story is as much about what's out—capital—and where it's going. And, that's not going to be just trophy deals, despite a few high-profile ones like Anbang Insurance Group's purchase of the Waldorf Astoria New York. Chinese investors are thinking less Champagne and caviar and more bread and butter deals.

## TWO JAPAN IS THE NEXT CHAPTER.

Fueled by metrics like 10% RevPAR growth over the three years from 2012 to 2014, and increasing investment, the country might just be the next China. Currently, Japan is enjoying a boom in inbound tourists (19 million visitors this year, according to Shunsuke Yamamoto, managing director, Fortress Investment Group, New York City) and there are severe hotel shortages in major cities like Tokyo, Osaka and Kyoto, says Seth Sulkin, CEO, Pacifica Capital, Tokyo. As Yamamoto pointed out during a session at HICAP, the leisure market is ex-



ploding. RevPAR in Tokyo is up 22%, while limited-service in Osaka is seeing 30% to 40% gains.

## THERE'S GOOD NEWS EVERYWHERE.

Even in Europe, not necessarily the brightest point of recent forecasts, both Chinese and U.S. investors see major upside, according to a recent Deloitte report. London's luxury pipeline alone is 2,500 rooms by 2021, with resort destinations in Spain and Portugal set to stay hot.

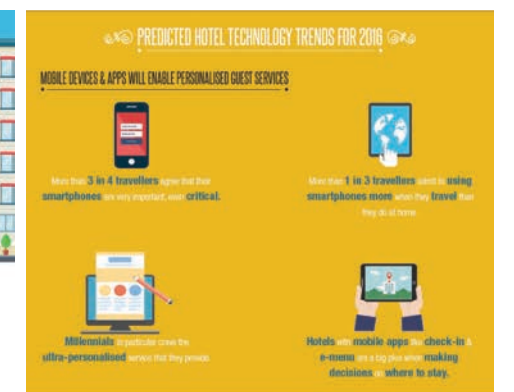
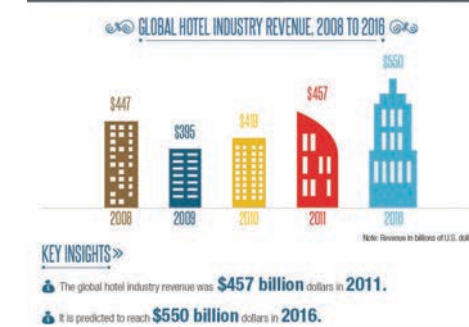
"European RevPAR growth still has potential to rise further, being driven by average rates as many markets have reached occupancy ceilings," says James Kaplan, senior vice president, Minor Hotel Group, Bangkok. The Middle East boom not only will continue, but broaden beyond the giants like Hilton to include heavy-hitting regional powerhouses from established ones like Rotana and Gulf newcomers like Steigenberger, according to a Viability report. Despite challenges getting funding in markets like Nigeria, East Africa (especially Kenya and Ethiopia) is drawing more attention, while Cote d'Ivoire looks set to continue its rise, according to Trevor Ward, managing director, W Hospitality Group, Lagos. The U.S. is becoming a more attractive picture as a whole and executives like Ohlsson see Mexico as a hot spot, especially through partnerships with FIBRAs.

## FOUR MICRO MARKETS CAN YIELD MACRO RETURNS.

The trend toward thinking local with hotel design is just as true for investment. Yes, New York and London still have a place on the investment hit parade, but secondary and tertiary cities are flying

up the charts. "Destinations of continued strength and interest for resorts are Bali, Phuket and Cebu – all of which have excellent international air access," Kaplan says. In the U.S., ask any investor what the hottest targets are, and each one has a different answer, crisscrossing the map from

flyover country to under the radar coastal destinations. "We're seeing some of the capital shift from primary markets to secondary and tertiary markets. Texas and Florida continue to boom this year, and we're also seeing a bump in Midwestern cities like Detroit and Cincinnati – where



we just signed an agreement for a new-construction Dolce Hotels and Resorts property,” Ohlsson says.

Deals will be more strategic than sexy. In terms of M&A activity, insiders expect 2016 to look more like 2015 than the frenzied trading of 2006-07. Small ripples of the international capital flow will be seeking multi-asset targets/portfolio deals. Wanxiang America's decision to partner with Geolo Capitalo to invest up to US\$1 billion in U.S. hotels could be a template for this niche in the investment market. Depending on their appetite for risk, global and funds and private equity players might be shopping a smattering of portfolio deals in the U.S., the U.K. and Germany.

Even with that, single-asset transactions will dominate. That's should be a positive factor in driving the the overall deal pace, and also for motivating domestic investors worried about being elbowed out by foreign investors. “While Asian and Arabian capital has been producing high-profile transactions (like the Waldorf Astoria acquisition or Lotte's purchase of the New York Palace), they are much smaller players than equity funds when it comes to rank and file hotel transactions,” Engel adds. “As long as interest rates remain low, money managers—particularly private equity managers—will execute transactions to deploy funds.”

would likely be a ripple effect through all forms of commercial lending.”

JLL's most recent hotel report forecasts the return of interest in securitization, led by U.S. hotel CMBS issuance. Overall, with exceptions such as Japan's expanding CMBS markets, JLL expects CMBS issuance to be lower in EMEA. But, even at current levels, “that would grow demand for acquisition in EMEA and stretch equity further,” according to JLL.

For these traditional capital partners, it looks like investors will find few surprises. Like Waldman, most foresee small interest rate hikes the market can absorb. Lenders will be more disciplined—experts predict 60/40 debt/equity ratios and 20-25% IRR



However, most experts agree that many headlines will continue to be made by consolidation among hotel companies by companies that want to fill in their brand portfolio. Maybe not as big as Starwood-Marriott, but significant nonetheless. Some REITs should be looking over their shoulders. “Will we see another investor step up and privatize/acquire a hotel REIT? Yes, the likelihood of that is great, particularly if hotel REIT stocks remain depressed,” says Matthew Engel, senior vice president with consultancy T.R. Engel Group, Boston.

### FIVE BANKS WON'T HAVE A MONOPOLY FOR DEAL MAKERS.

“We predominantly use local and regional bank financing for our investments, but we do have some exposure to Commercial Mortgage-Backed Securities (CMBS) for select opportunities,” says Brian Waldman, senior vice president, Peachtree Hotels Group, Atlanta. While he calls CMBS “the driving force in the industry,” Waldman cautions that velocity in that market “poses a greater risk today than rising interest rates. If CMBS scales back, there

thresholds for banks and private equity.

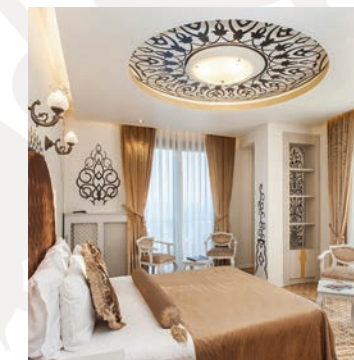
But there's a wildcard at work. In PwC's “Capital Markets 2020: Will it Change for Good,” the “capital users” who responded raised a red flag about new funding sources. It said executives are highly concerned by the threat posed by shadow banking players such as crowd funders and peer-to-peer lenders, with more than two-thirds (70%) stating they see a moderate to severe threat to traditional banks and 16% indicating they believe shadow banking may expand beyond its current 25% market share of financial assets. Only one-fifth



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of respondents agree that shadow banking players present innovative partnership opportunities. In terms of finding capital, bank on the historic financial centers. According to PwC, “Despite shifts in global gross domestic profit and economic power, liquidity pools will continue to aggregate in established global financial hubs. While the majority (76%) expects a financial center rivaling London and New York to emerge, we expect that these two cities will continue to lead the global financial ecosystem through to 2020, as they provide a combination of stability, transparency and rule of law against a global backdrop of global instability, state-directed capitalism and a war for resources.”



### SIX INTEREST RATES WILL LIKELY STAY LOW.

“The European Central Bank is ‘mugging’ the United States, most recently stating that they will continue quantitative easing and maintain near-zero to negative interest rates for the foreseeable future. There is no rationale to support an increase in interest rates in the foreseeable future,” says Lee Pillsbury, chairman, Thayer Lodging Brookfield Hotel Properties, Annapolis, Maryland. If the Fed does raise rates, though, insiders and investors will have to be ready to take lower returns, assume more risk or lower their offers.

groups like the economy and budget City Lodge are the exception to values that still haven’t recovered to a 2010 peak, says Marcel von Aulock, CEO, Tsogo Sun Holdings, Johannesburg. But, he adds, Mozambique is showing strong growth.

### EIGHT NEW BRANDS (AND SOME MARKETS) COULD JUSTIFY A BUDDING INTEREST IN NEW BUILDS.

Premium branded select-service and extended-stay are segments where new-build is a good idea, according to Engel. Kaplan points to mixed-use development as another opportunity.

In African markets with bad existing in-

### SEVEN VALUE TRENDS AND PEAKS TELL DIFFERENT STORIES IN DIFFERENT PLACES.

One size doesn’t even come close to fitting most. In the U.S., room to run will show up mostly in unexpected secondary and tertiary markets. “Phoenix, St. Louis, Kansas City and Richmond are four that immediately come to mind with improved values,” Engel says. “The gateways are approaching a plateau. Values should top out around 2018, with New York the first market to peak.” It’s a shorter timeframe across the pond. Over half the respondents in the Deloitte study see the peak as less than 18 months away for Europe. In South Africa,

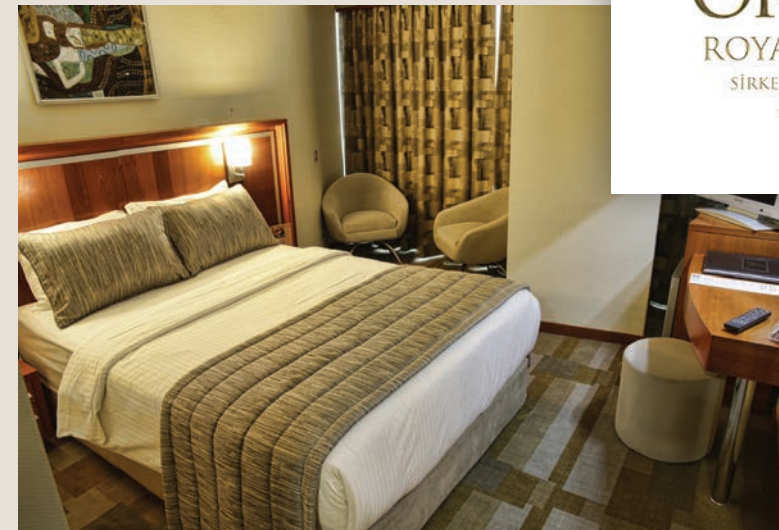
ventories, starting from scratch might be preferable, Ward says. “Conversion deals outside South Africa are almost nil,” he adds. Von Aulock sees another view in South Africa. “New-build prices are just not feasible when compared to what you can buy trading hotels. At Tsogo, we have been buying hotels at around half their replacement cost, and even that has seen implied earnings multiples that made us think twice,” he says.

### NINE AIRBNB WON’T BE THE BIGGEST NON-CAPITAL CHALLENGE.

Forget about the sharing economy or any other trendy threats. Looking beyond the numbers, the biggest issues are familiar—labor and construction costs. “The industry is absorbing tens of thousands of people each year and increasingly it is more difficult to recruit, train and retain qualified hotel staff,” Kaplan says. And, the costs of both human and material resources on the construction side will continue to rise (Turner already reports a 4.52% year-over-year increase in the third quarter of 2015 for U.S. projects), particularly in hot markets like Japan and in key gateways.

### TEN THE RIDE’S NOT OVER YET.

Whatever the timeline or sector, most agree that it’s a glass-half-full outlook when it comes to performance, though it’s a tempered optimism. “The Americas’ and Canada’s performance appears strong as they see accelerating RevPAR growth due to low new supply,” Kaplan says. “The Middle East, an overheated market situation, will improve, while in Australasia growth is expected to increase as a result of rising tourism and solid market fundamentals. While above-mentioned views are likely to hold true for profit and earnings, profitability in terms of returns on investment depends on the size of initial capital outlay.”



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# ROYAL DRAGON IS TURKISH CHAMPION

The Royal Dragon hotel in Kumköy, near Side on the Turkish Riviera, was the most popular hotel in Turkey last year for German tourists, according to the fvw Hotelometer ranking of the most popular hotels in Turkey, Spain and Greece.



The hotel came top of the overall enquiries ranking as well as for families and singles, and was third for couples, analysis of all the rankings since the Hotelometer started last June showed. The Aydinbey Kings Palace came second and the Delphin Imperial Lara was third in the overall ranking for 2015.

To celebrate, the Royal Dragon moved up three places to third in the latest fortnightly ranking covering enquiries made between December 14 and December 27. The Aydinbey Kings Palace remained in top spot ahead of the Primasol Hane Family. Families were also most interested in these three hotels (in the same order of ranking) while most enquiries from couples were for the Aydinbey, the Commodore Elite Suites and the Adalya Ocean (in Evrenseki, Side).

In Greece, the Ikaros Beach Luxury Re-



sort & Spa, the Apollonia Beach Resort and the Lyttos Beach defended their top three places in the overall ranking. In the family ranking, the Apollonia overtook the Lyttos Beach to gain top spot, with the Lindos Princess Beach in third place. Most enquiries from couples again went to the Ikaros Beach, the Kernos Beach and the Agapi Beach.

Spain's top three hotels for German tourists ended the year in their traditional rankings: Lopesan Costa Meloneras, Iber-

ostar Playa Gaviotas and Iberostar Fuerteventura Palace. FTI's Labranda Bahia de Lobos moved up to fourth. In the family ranking, the Hipotels Cala Millor Park moved up to second place behind the Sotavento Beach Club and ahead of the Iberostar Club Cala Barca. Most enquiries from couples came for the Lopesan Costa Meloneras, Iberostar Playa Gaviotas and the Labranda Bahia de Lobos.

The fvw Hotelometer is a fortnightly ranking of the most popular tourist hotels in Spain, Turkey and Greece, based on all enquiries in the Traveltainment reservations system used by German travel agents and online booking engines. The data, supplied by IT company TrevoTrend and split into different categories (overall, families, couples, singles and star ratings), thus reflect demand trends but do not show actual bookings.



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# RADISSON BLU HOTEL KAYSERI: THE PR AMBASSADOR OF KAYSERI

Kayseri will continue to be a rising star in our country and in the neighbouring geography, due to its importance in cultural and history tourism, to its winter sports facilities and also due to its very dynamic economy.

Some facilities add value to the place they are located in. This is true in the case of the Radisson Blu Hotel Kayseri. It acts as if it was a PR ambassador aiming at promoting Kayseri in Germany, the Netherlands, Spain and Dubai and many other places and fairs all over the world. Fercan Başkan, the general manager of the Radisson Blu Hotel will tell our readers about the hotel he manages.

**Could you present the Radisson Blu Hotel Kayseri with its main features?**

The Artaş Group, known for its special projects in Istanbul like the Maslak Eclipse and the Vadistanbul, has opened the Radisson Blu Hotel Kayseri as its second big investment in Kayseri after the Kayseri Park Shopping Mall, as the 10th hotel

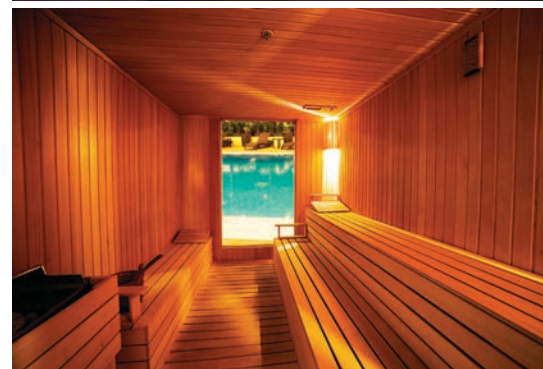
of Radisson in Turkey, in September 2014. Kayseri is one of the major industrial centres of Turkey, thus attracting many businessmen, but because of its winter sports opportunities and its cultural and culinary attractions also leisure tourists. The Radisson Blu Hotel Kayseri plays a major role in establishing the brand of Kayseri in this context, offering businessmen and skiing aficionados service in five star quality, all the while presenting local Seljuk motives in its interior decoration concept.

**You hotel draws attention by its modern architectural style and its special design. What makes you different from the other hotels in town?**

The Radisson Blu Hotel Kayseri is the highest building in Kayseri and also the



Fercan Başkan, "We are special, we are authentic, we have quality. We are working with a successful team boasting of a high level of education and also of experience. This is what makes us special, privileged and successful."



only one equipped with an intelligent building system, thus dominating the silhouette of the city and also leading the accommodation sector in Kayseri. The location of our hotel right in the centre of the city, its panoramic view of the city and of the majestic Mount Erciyes is fascinating our guests. The 244 rooms designed

to be comfortable and 1 king suite are distributed on the 20 floors of our hotel, with special floors catering to businessmen and offering executive rooms. Our guests can use high-speed internet connections free of charge, and are also invited to visit our lounge and our stylish restaurants. With all these features our hotel is one of the most

attractive places in the city.

**Which are the most important services you hotel offers its guests? What makes you special?**

All of our personnel commands experience which enables them to get the Radisson Blues promise of 100 percent guest satisfaction in place. They are educated

every once again in foreign language, marketing, communication skills and first aid. Our first aim is to let our guests experience the traditional hospitality of Anatolia and its priceless tastes. We are proud to offer hotel services at an international level in Kayseri. We are special, we are authentic and we offer high quality. We are working with a team which has lots of experience and is highly motivated, and this makes of special and privileged. Also, as a hotel, we have been awarded the "Green Star" which is given by our Ministry for Culture and Tourism to facilities which act according to principles protecting the environment.

**How is your customer profile?**

We mostly welcome businessmen from Turkey, Germany and from Spain but also



ski fans and winter sports enthusiasts from all over the world. We also offer the businessmen and the NGOs of Kayseri a venue to have their meetings. After many successful promotion activities in and out of Turkey we are a new meeting point for winter sports enthusiasts with our "Kayseri Erciyes Winter Sports and Tourism Centre".

**Which are the restaurant, lounge, spa and meeting facilities you are offering your guests?**

Our lounge and our restaurant are located on the roof terrace with its wonderful view of Mount Erciyes, and they are sought after a lot by our guests from abroad, also for the rich collection of Anatolian and international dishes which are offered in our menu. Our big conference hall with a capacity of up to 900 persons offers services conforming with international standards. Our fitness centre, included in the "City Club", saunas, steam rooms and rooms

for diverse wellness treatments along with an interior swimming pool may be used by our guests.

**But also the rooms of the Radisson Blu Hotel Kayseri are special. What do they offer the guests?**

As you certainly know, standard hotel rooms in Turkey are between 15 and 20 square meters, whereas in our hotel the smallest standard room can boast of 35 square meters. The biggest of our suites measures 250 square meters. All of our rooms are equipped with tea and coffee machines, internet, ironing table and ironing machine. All of these are free of charge.

**How did your guests react on your hotel?**

Our guests are satisfied by their stay and convey as much to us. Also the international sportsmen staying in our hotel during the European Snowboard Championship last year told us they had been very happy with our services and the level of

quality we provided. The satisfaction of our guests and their thanks make us happy and give us the energy and motivation to give even more effort in this direction.

We are also very glad to see that our high standards are causing a very positive feedback, which was one of the reasons Kayseri has been chosen as the venue for the FIS Snowboard World Cup Final which took place in 27th of February 2016 on Mount Erciyes. 85 sportsmen coming from 18 different countries stayed in our hotel. We are very optimistic for the future of Kayseri in tourism, and we are convinced that we will be welcoming many more visitors interested in winter sports, history and culture tours and also in local culinary values in the future.

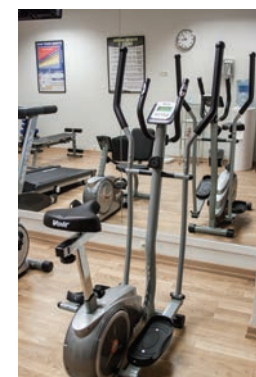
**Is there anything you would like to add on you behalf?**

As Radisson Blu Hotel Kayseri we are contributing a lot to the promotion of Kayseri on international platforms, and with our high quality services we also push up the level in our city. Along with that we are also interested in social responsibility projects which we are leading in Kayseri. For example last year we hosted 75 orphaned children between 7 and 17 years of age for a big brunch. In appropriate months we do not forget our senior citizens but visit them in their home for the aged persons in Kayseri. Our personal donated blood to the Red Crescent. We will go on with projects of this kind as one of the leading tourism facilities in Kayseri in this year as well. I would like to add that I will be very proud and glad to visit many new visitors and to extend the hospitality of Anatolia to them on behalf of the Radisson Blu Hotel Kayseri.




# RECITAL

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Recital Hotel, located in the central part of the historical peninsula Sultanahmet, offers its luxury and hospitality to our guests. Most of the historical attractions of Istanbul are either within a few minute walk or can be easily reached by various means of transportation. Some of the most famous ones in the environs of Recital Hotel are St. Sophia, Blue Mosque, Topkapi Palace, Underground Basilica Cistern, Grand Bazaar, Spice Bazaar, Ancient Hippodrome and Obelisk. Recital Hotel has 31 spacious and individually decorated guest rooms, including 3 Corner Suites, 2 Superior Sea View Rooms, 9 Superior Rooms, 3 Deluxe Rooms partial sea view and 14 Standard Rooms. All rooms have a private bathroom with bathtub or shower, free high-speed and wireless internet connection, hairdryer, direct dial telephone, flat screen HD Lcd TV, satellite system, minibar, self control heating/air-conditioning, and a safe box, tea/Coffee facilities and espresso facilities in the Superior Sea view, deluxe and corner suite rooms. The stylish rooms and luxurious amenities at the Recital Hotel make it an elegant sanctuary that shimmers with sophistication. The hotel has a fitness, a business center and a terrace overlooking the Marmara Sea.



# TIMUR BAYINDIR ONCE AGAIN ELECTED PRESIDENT OF TÜROB



TUROB Chairman Timur Bayındır stated that the sector is going through hard times, but that the reforms implemented regarding tourism will be of crucial value for the industry. “We want to go outside of the Istanbul-Antalya-Muğla triangle, and reach out to the whole country,” said Bayındır. **HALIL TUNCER**

**T**ÜROB Chairman Timur Bayındır said the association has been concerned about the escalating geopolitical and security risks over the sector, but is not in “crisis mode,” calling for the initiation of a number of measures to overcome hurdles. Suggested measures include increasing the number of transit passengers who find accommodation in Turkey and tax cuts for sector players.

“The recent negative developments in our neighboring region, namely terror attacks and political tensions, have triggered concerns in our sector. We have been concerned about the recent developments, but as TÜROB, we [do not perceive] a crisis. In

the face of these negativities, a number of key measures need to be taken immediately to protect the sector and tourism jobs and to remain competitive,” he said.

Bayındır then mentioned a few measures that have already been submitted to the related ministries.

Measures include cuts and postponement in employment taxes, around 50 percent of treasury warranty in loan rates and some discounts in other taxes, just as is the case for exporters.

Bayındır said tourism investments in Turkey have surpassed \$75 billion with over 1.3 million units of bed capacity.

“Only in the last two years, more than

\$3.5 billion was invested in the sector. The investments are expected to reach \$90 billion by 2023 with over 1.3 million jobs,” he said, adding the current sector issues should be seen as opportunities to make required reforms in the sector, such as diversification so as to lure more health, winter and “green” tourists.

He also expressed the highly lucrative opportunity that transit flight passengers offer through an extension of their time in Turkey.

“Some 54 percent of outbound-flight passengers in our airports, approximately 14 million passengers annually, pass through our country not ‘even drinking one



Turkish Airlines CEO  
Temel Kotil

glass of water.’ We aim to realize a project to lure transit air passengers to stay in Turkey in cooperation with the Tourism Ministry, the Ministry of Foreign Affairs and Turkish Airlines. Even 1 million additional overnight stay will add \$1.8 billion extra revenue to the sector,” he said.

In 2015 as a whole, Turkey’s tourism revenues fell 8.3 percent, reaching \$31.46 billion amid a huge decrease in the number of Russian and European tourists.

Bayındır also thanked Tourism Minister Mahir Ünal for the recent \$6,000 financial support for each airplane that carrying 100 or more tourists from foreign countries to airports in Antalya, Alanya, Bodrum, Dalaman, İzmir and Kütahya in April and May 2016.

“We expect the extension of this measure to all airports in Turkey for a wider period of time,” he noted.

Turkish Airlines CEO Temel Kotil has called for tourism representatives to create a task force and to focus on Asia and Africa as the sector players have voiced their concerns amid escalating risks affecting the country’s tourist numbers.

“What we all need to do is to seek new markets together. Let’s join our forces to invite tourists from Asian and African countries to Turkey. The money will be hands of these countries in the future, when Istanbul will become one of the biggest mega-hubs of the world,” he said at the 22nd general board meeting of the Hoteliers Association of Turkey (TÜROB).

Kotil noted that the tourism sector may have some problems right now, but things will recover as Turkey has steadily been becoming a hub.

“While the number of air passengers in Turkey was 19.6 million in 1994, this num-

ber has increased to 123 million in 2014. This figure is expected to increase up to 381 million in 2034, enabling Turkey to reach around 5.4 percent of the world’s air traffic. This is an incredible growth story as the same report has projected North Africa’s share will be around 19 percent, just four-times higher than Turkey’s,” he said, adding that Turkish Airlines has become Europe’s best airline. He said this year the company will focus on Latin America and is growing both in Asia and Africa quite rapidly.

“We’ll do whatever it is necessary to support Turkey’s tourism. We have already had charter flights between Saudi Arabia and the Black Sea provinces for example. We also plan to increase the number of direct flights to Antalya from many countries by this summer after a series of meeting with sector representatives,” he noted.



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## NEW GENERAL MANAGER AT PEGASUS

Turkey's leading low-cost carrier Pegasus Airlines has appointed a new General Manager. Pegasus Airlines has appointed Mehmet Nane as its General Manager. Before joining the airline, Nane was the General Manager of Carrefour. Carrefour is a joint venture of Sabancı Holding and Carrefour, the top retailer in Europe and the second largest in the world with over 10,000 stores in 34 countries. In 2015, Pegasus achieved 13.2% year-on-year growth in the number of guests carried, flying a total of 22.34 million guests. In 2015, 13.81 million guests flew on domestic routes in Turkey, translating to an increase of 15.4% compared to the previous year, while the number of guests flying on international routes reached 8.52 million, registering growth of 9.8% compared to 2014. During 2015, Pegasus grew 1.1 times faster than the Turkish market average on Turkish domestic routes, increasing its market share to 28.3%; and 2.1 times faster than the Turkish market average on international routes, increasing its market share to 9.8%.



Mehmet Nane

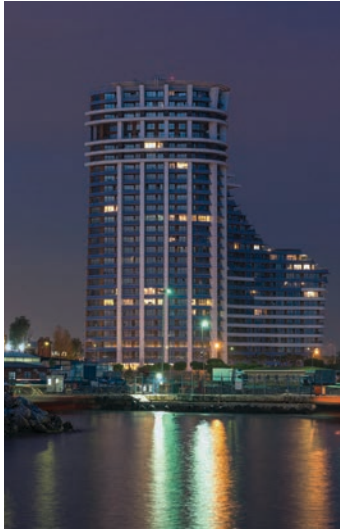
## TAV AIRPORTS' REVENUE PASSES €1 BILLION

TAV Airports increased its revenue by 10% to EUR 1079 million in 2015. The company posted EUR 210 million in net profit. TAV Airports Holding Executive Board Member & CEO Sani Sener stated "The revenue, EBITDA and net profit we have posted are naturally indicators of our success. However, these metrics only go so far to show the true value of an enterprise. I believe what's equally as important

is what we contribute to our country, employees and clients as a company. This year we paid around EUR 500 million to the state in the form of rent, taxes and social security. We paid EUR 200 million to our employees as wages. We invested EUR 88 million to increase passenger comfort and created employment opportunities for our youth. An enterprise must prioritize the benefits of the country, pay its employees fairly, contribute to their development through education and training and invest in the future to be considered truly successful. TAV's main goal is to go after this kind of success. Thus, this year, as in previous years we have crowned our financial success with the social benefits we have created.

## RADISSON BLU HOTEL, ATAKOY OPENS

Radisson Blu opens its seventh hotel in Istanbul, Turkey. Radisson Blu Hotel, Istanbul Atakoy is the latest addition to the group's portfolio. The hotel is located in the Bakirkoy district of Atakoy. The hotel sits midway between Ataturk International Airport and Istanbul Old Town. Its stunning location on the shores of the Marmara Sea puts guests within walking distance of the Atakoy Marina and conveniently close to the Old City and Bakirkoy Ferry Station. Radisson Blu is the leading upscale hotel brand in Istanbul. Our latest addition in Atakoy is another beautiful Turkish delight, fueling our strong ambitions to grow across the country. We plan to add another eight hotels, resorts and residences shortly," said Mark Willis, Area Vice President Middle East & Turkey, The Rezidor Hotel Group.



## DEDEMAN GROUP'S PARK DEDEMAN ELAZIĞ OPENS



Dedeman Group's first hotel in 2016, Park Dedeman Elazığ, has started to receive its guests. Dedeman Group has opened the doors of Park Dedeman Elazığ in one of the oldest settlements in Anatolia, Elazığ, with the partnership of Ballica Hotel Company. Offering accommodation services in the heart of the city, Park Dedeman Elazığ is only 1 km away to the bus terminal and has a distance of 13 km to the airport. Park Dedeman Elazığ is also in close proximity to the Hazar Baba Ski Center, Harput Historical Site and Park 23 Shopping Center, all main attractions of the city. Park Dedeman Elazığ has a total of 72 rooms: 3 suites with different concepts, 66 standard rooms, all decorated with utmost care, three rooms for the disabled and a special floor for non-smoker visitors.



## GOLDEN CROWN HOTEL

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**26<sup>th</sup>-29<sup>th</sup> January 2017**

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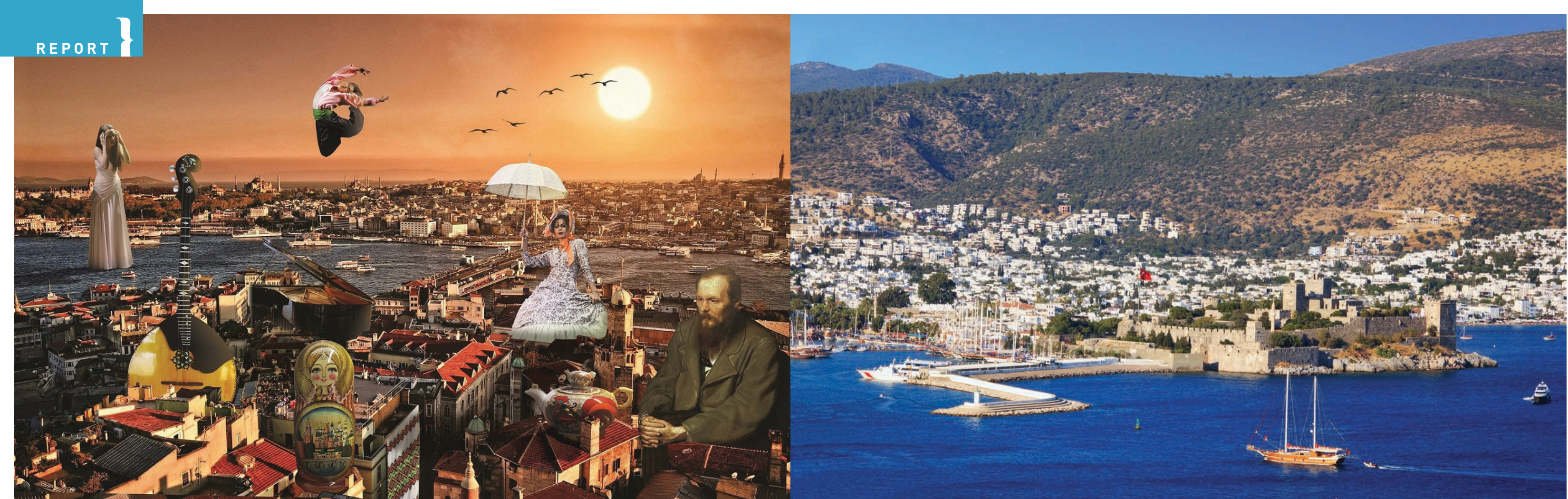
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# TURKISH 2015 TOURISM REVENUES FALL 8.3 PCT TO \$31.46 BLN: DATA



Tourism revenues in Turkey declined 14.3 percent to \$6.57 billion in the final quarter of 2015, the Turkish Statistics Institute (TÜİK) said on Jan. 29. In 2015 as a whole, tourism revenues fell 8.3 percent, reaching \$31.46 billion amid the decrease in the number of Russian and European tourists.

**T**he number of visitors to Turkey fell 1.61 percent in 2015 from the previous year, data from the Tourism Ministry showed on Jan. 28.

While some 81.3 percent of tourism income (excluding GSM roaming and marina service expenditures) was obtained from foreign visitors, the remaining 18.7 percent was obtained from citizens residing abroad, according to TÜİK data.

While average expenditure per capita

was \$756 in 2015, the average expenditure of the foreigners was \$ 715 per capita and the average expenditure of the Turkish citizens residing abroad was \$970 per capita.

In 2015, the number of Turkish citizens visited abroad increased by 9.6 percent compared to the previous year and reached 8.7 million. Average expenditure was \$651 per capita, according to TÜİK data.

## FOREIGN ARRIVALS

A total of 36.2 million foreigners visited the country in 2015, according the Tourism Ministry data. The number of Russian visitors to Turkey decreased to 3.65 million in 2015 from around 4.5 million in 2014, amid Russia's economic troubles. The decline accelerated after the diplomatic crisis between Russia and Turkey erupted on Nov.

24, 2015, with the number of Russian tourists visiting Turkey decreasing by around 46.9 percent to 25,485 in December 2015 compared to the same month of 2014.

Overall, foreign arrivals declined by around 7.3 percent to 1.46 million in December 2015 compared to the same month of 2014.

Despite the drop, the Russian market remained the second largest source of foreign arrivals for Turkey, with over 10 percent of the total. The number one source of arrivals was Germany, which took around 15.5 percent of the total with around 5.6 million visitors, while the U.K. was the third top source of foreign arrivals to Turkey, with a share of around 7 percent of the total.

The number of arrivals from the Middle East and the Gulf increased sharply in 2015

compared to the previous year, although the figures were still much lower compared to arrivals from Europe.

The number of arrivals from Saudi Arabia rose by 31 percent to around 450,000 in 2015 compared to 2014.

Arrivals from Bahrain also saw an increase of 34 percent to around 32,500 in the same period.

Turkish Culture and Tourism Minister Mahir Ünal said earlier that the sector was unavoidably affected negatively by the Russian crisis as well as regional uncertainties.

A number of measures will be taken to recover these losses and the planned EXPO meeting in the Mediterranean resort of Antalya will be a great platform, Ünal said at a meeting in Ankara on Jan. 14, as reported by Reuters.



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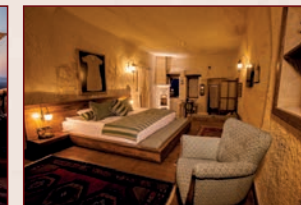


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