NEAR EAST UNIVERSITY FACULTY OF ECONOMICS AND ADMINISTRATIVE SCIENCES GRADUATE STUDIES

ARE ON ST

NORTH CYPRUS TOURISM

BY
ALTINAY YAVUZ

A THESIS

Presented to the Faculty of The Graduate Studies in the Near East University
In Partial Fulfillment of Requirements
For the Master Degree
Under the Supervision of Prof. Dr. Mevlüt Çağlar

July 98 Lefkoşa-K.K.T.C

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1.INTRODUCTION

North Cyprus tourism sector offers to service with 60 hotels, 79 of "A" class of tourism agencies and representations tour operator, its nature and history. According to the North Cyprus government planning organizations' data, in 1995 tourism income was 218.9 million dollar, in 1996 it failed 180.3 million dolar and 1996 declared disaster year of the tourism sector by Ministry of tourism. In 1997, it lived %100 full of capacity and for next years should be lived exactly the same success. In this frame, it has to determine the target which generate especially foreign customer's wants/needs and to be pleasant them from coming in North Cyprus until return their own country. Now an public survey need to understand what's the wrongs, deficiency and rights:For these reasons 23 questions prepared and asked 12 years old and over 12. And the sample size is 50 individuals representative of the North Cyprus visitors. Thus the result of Marketing Research existing, Ouestionnaire obtains information from potential customers and help to identify the strategies. After determining strategies that have to apply each area. Thus sector income can be increased in this way.

1.1ACCORDING TO THE DISTRIBUTION OF YEARS NET INCOME OF TOURISM.

YEAR	NET INCOME OF TOURISM (Million Dolar)
1990	224.8
1991	153.6
1992	175.1
1993	224.6
1994	172.9
1995	218.9
1996	180.3
1997	230.9

1.2.ACCORDING TO THE DISTRIBUTION OF YEARS USE OF CAPACITY IN TOURISTIC ACCOMANDATION.

YEAR	USE OF CAPACITY (%)
1990	37.6
179,377	
1991	22.6
1992	32.4
3 281,37	
1993	40.1
1994	38.6
1995	38.6
1996	32.5
1997	42.5

1.3.ACCORDING TO THE DISTRIBUTION OF YEARS ENTERED VISITORS FROM HORBOURS TO TRNC

YEA	R T.C	FOREIGN	TRNC	TOTAL
1990	224,26	57,541	74,681	375,491
1991	179,379	40,858	66,012	286,249
1992	210,178	57,440	78,466	346,084
1993	281,370	77,440	93,669	452,982
1994	256,549	95,079	109,787	461,415
1995	298,026	87,733	134,374	520,133
1996	289,195	76,000	133,099	498,294

2.1.TRNC VISITOR SURVEY

Please ask if interviewee is 12 years and older. Only continue if this is the case. (Questions asked 50 people)

Q1)How old are you?

	Educational purposes	7
	A day out	ε
	To visit friends or relatives	7
	For business purpose	I
		CODE
(7)	why have you come to hor	i. surgyo n

As part of a holiday 5
Other 6

Q3) Have you visited TRNC before?

een to TRNC before?	imes have you	Q4)How many t
		No(2) m.s
	49	Xes(1)

	(GL	e)Oth
nondroiM(b	sosia	b)Nic
c)Famagusta	enia.	a)Kyı
stay?	re do you	б2)Мре

Q6)a)What kind of accommodation do you use on your visit?

Hotel/Motel
Self catering flat/ house
Staying with friends or relatives
Rented a house
Other

b) How much do it cost approximately for you to stay in this type of accommodation.

\$,DM,TL.....

Q7)Where will you visit today?

- -Nicosia
- -Kyrenia
 - -Famagusta
 - -Morphou
 - -Lefke

Q8)How long have you spent approximately today?

- -Less than 1 hour
- -1-3 hours
- -3-5 hours
- -5-7 hours
 - -More than 7 hours

Q9)Which attractions have you vi	sited on TRNC today?
a)Kyrenia	b)Nicosia
.Bellapais	.Selimiye Mosque
.The port of Kyrenia	.Mevlana Tekke
.The Lusignan Castles	.Büyük Han and Kumarcılar
.Beaches of Kyrenia	Han.
(swimming, watersports, etc Ship Museum) .Dervish pasha konagi (Mansion)
*	.The Bedesten
c)Famagusta	
.The old town	
.St.Nicholas Cathedral	
.Salamis	
.The Monastery of Saint Barna	bas
.Beaches of Famagusta	
Toil	
d)Morphou(Güzelyurt)	
.The Monastery of St. Mamas	
.Vouni Palace	
e)Lefke	
f)Other	
Q10)Have you purchased or used	a Guide?
Yes	
No	
Q11)Do you think that the facilit	ies in TRNC are
adequate?e.g:Car Parks,Toilets,Ba	anks, Shops, Eating places.
Yes	
No	
If No, Why not?	
m	

Q12)What do you particularly	like	about i	n TRN	C?	
1) = 4 mines					
2)					
3) in Remai					
Q13)Are there any particularly 1)	dislik	e abou	t TRN	C?	
2)					
3)					
accet price					
Q14)If you could rate on a sca	ale of 1	to 5 (with 5	being	the ton
and best mark), how would yo					
TRNC?			8		
lagro agest			3	4	5
Transportation	-	_		•	
Overcrowded					
Car parking facilities					
Toilets					
Shops					
Cleanliness					
Service/customer care					
i.e.in shops,restaurants,etc.					
Attractions to visit					
Restaurants					
Nature					
Pub/Disco Beaches, Sea, pool					
_	- an ah a	TD?	VIC 9		
Q15)How did you originally he		out IKI	NC?		
Holiday brochure/travel sh					
Word of mouth					
Tourist information centre					
Newspaper/magazine					
Radio, Television					

- Q16)Which do you choose transportation vehicle for visit in TRNC?
 - a)Bus departures
 - b)Taxi
 - c)Car Rental
 - d)Tour Bus/Minibus
- Q17)Why is chosen it?
 - .Convenience of departure
 - .Ticket price
 - .Direct/Non stop service to destination
 - .Part of tour package
 - .Company travel department selected
 - .Travel agent suggestion.
- Q18)Do you mind answering a few questions about how much you yourself have spent today?

Yes Q21

No Q19

Q19)Can you tell me approximately how much it has cost you to trravel from home to TRNC.

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Q20)a-How much money have you yourself spent on goods and services in TRNC today?

b-Can you please give me an indication of the type of goods and services which you have purchased?

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		No(2) m.s	
	49	Xes(1)	

	:per	1O(9)
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c)Famagusta	yrenia	a)K
stay?	ere do you	O2)MP

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b) How much do it cost approximately for you to stay in this type of accommodation.

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(swimming, watersports, etc Ship Museum) .Dervish pasha konagi (Mansion)
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c)Famagusta	
.The old town	
.St.Nicholas Cathedral	
.Salamis	
.The Monastery of Saint Barna	bas
.Beaches of Famagusta	
Toil	
d)Morphou(Güzelyurt)	
.The Monastery of St. Mamas	
.Vouni Palace	
e)Lefke	
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No	
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Yes	
No	
If No, Why not?	
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1)					
2)					
3)					
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3)					
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Q14)If you could rate on a sca	le of 1	to 5 (with 5	being	the tor
and best mark), how would you TRNC?	u rate 1	the foll			
Lord agent massin			3	4	5
Transportation	1	Lui	3	7	3
-					
Overcrowded Car parking facilities					
Toilets					
Shops					
Cleanliness					
Service/customer care					
i.e.in shops,restaurants,etc. Attractions to visit					
Restaurants					
Nature					
Pub/Disco					
Beaches, Sea, pool	4				
Q15)How did you originally he		ut TRI	NC?		
Holiday brochure/travel sh					
Word of mouth					
Tourist information centre					
Newspaper/magazine					
Radio, Television					

- Q16)Which do you choose transportation vehicle for visit in TRNC?
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Q20)a-How much money have you yourself spent on goods and services in TRNC today?

b-Can you please give me an indication of the type of goods and services which you have purchased?

Q21)What is your nationality?

Country.....

Q22)Do you mind telling me what your occupation is?

(If they are a student, unemployed, retired or a housewife, probe to find out their father's occupation, intended occupation, previous occupation or their husband's occupation respectively)

Q23)Do you think you will visit TRNC again?

Yes

No

Don't know.

2-1 THE RESULTS OF MARKETING RESEARCH QUESTIONNAIRE

Q1) How old are you? n=50

12-25 %20

26-35 %16

36-45 %20

46-55 %34

56-65 %6

65-over %4

Q2)Why have you came to North Cyprus?

For business purpose %14
To visit friends or relatives %12
A day out %4
Educational purpose %14
As part of holiday %44
Other %12

Q3)Have you visited North Cyprus before?

Yes %52

(221)

No %48

Q4)How many times have you been to TRNC before?

From 26 people out of 50.

Once -11 people %42.30

3 times-4 people %15.38

4 times-3 people % 11.38

7 times-8 people %30.76

Q4) Where do you stay?

a)Kyrenia %52

b)Nicosia %18

c)Famagusta %24

d)Morphou %6

e)Other %0

Q6) a) What kind accommodation do you use on your visit?

Hotel/Motel %68

Self catering flat/house % 6

Staying with friends or relatives %12

Staying rented house %14

b) How much do it approximately for you to stay in this of accommodation.

6 people except: Staying with friends and relatives.

45 million-59 million(TL) %45.45 -20 people

60 million-70 million (TL) %38.6 -17 people

100 sterlin-200 sterlin %9.09 - 4 people

250\$-300\$ %6.81 - 3 people



Q7) Where will you stay?

-Nicosia %12
-Kyrenia %40
-Famagusta %26
-Morphou % 8
-Lefke % 8
-Other places % 6

Q8) How long have you spent your time apprroximately today?

-Less than 1 hour %20 -1-3 " %20 -3-5 " %18 -5-7 " %26 -More than 7 " %16

Q10)Have you purchased or used a guide?

Yes-%58 No-%42

Q11)Facilities in TRNC are adequate?

Yes-%30 No -%70

Q12)What do you particularly like about TRNC?

They like natural environment with their historical places, both temperatures of the air and sea, its coastline pleasantly and it's not crowded.

Q13)Are there any particularly dislike about TRNC?

Mostly consumers dislike service quality of the facilities.

Q14)How would you rate the following attributes for TRNC?

```
Transportation 1(%14) 2(%26) 3(%56) 4(%0) 5(%4)
            1(%0 ) 2(%0 ) 3(%16) 4(%24) 5(%60)
   Nature
                1(%0) 2(%0) 3(%0) 4(%20) 5(%80)
   Overcrowded
   Car parking faci. 1(%14) 2(%44) 3(%30) 4(%12) 5(%0)
   Toilets 1(%20) 2(%56) 3(%24) 4(%0) 5(%0)
   Shops 1(%28) 2(%24) 3(%36) 4(%12) 5(%0)
   Cleanliness 1(%44) 2(%28) 3(%28) 4(%0) 5(%0)
   Service customer 1(%56) 2(%14) 3(%30) 4(%0) 5(%0)
   care
   Attraction to visit 1(%0) 2(%0) 3(%20) 4(%20) 5(%60)
   Pubs/Disco 1(%0) 2(%0) 3(%24) 4(%50) 5(%26)
                1(%50) 2(%34) 3(%16) 4(%0) 5(%0)
   Restaurants
   Beaches, sea, pool 1(%0) 2(%0) 3(%26) 4(%50) 5(%24)
Q15) How did you originally hear about TRNC?
    Holiday brochure/travel shop %24
Word of mouth %26
Tourist information centre %10
Radio, Television
                          %18
   Newspaper/magazine %16
                          % 6
Others
Q16) Which do you choose transportation vehicle for visit in
TRNC?
    a) Public Bus or minibus %26
                      %16
    b)Taxi
    c)Car rental %24
                    % 6
    d)Private car
                      %28
    e)Tour bus
```

Q17) Why is chosen it?

a)Because of Ticket price

b) " " Convenience of departure, direct service to destination.

c)Because of Convenience of departure, direct service to destination, ticket price, travel agent suggestion.

d)Because of Conveience of departure, ticket price.

e) " direct service,part of tour package,company travel department selected.

Q18)Do you mind answering a few questions about how much you yourself have spent today?

Yes %80 Q21 No %20 Q19

Q19)Can you tell me approximately how much it has cost you to travel (from home to TRNC)?

160\$,120\$,180\$,26million,70sterlin,60\$,20million,28million,14million.

Q20) a)How much money have you yourself spent on goods and services in TRNC?

They have spent between 70\$ and 150\$.

b) They have purchased mostly drinking, eating and shopping facilities.

Q21) What is your nationality?

TRNC %12

TC %56

Foreign country %32

2-2 AN OVERVIEW PRODUCT

North Cyprus is the third largest island in the Mediterranean. Its products is both ranges from being natural and man-made. Nature of North Cyprus espacially its the unique climate offers year-around opportunities to visitor for a perfect holiday.Rainfall is concentrated in December and January, and the avarage sea temperature is above degree of 20 centigrade for more than half the year.North Cyprus is renowned for its wild flowers that carpet the island in spring and scent of orange, lemon and grapefruit blossom fill the air. In addition of these, The costline of North Cyprus offers finest and safety bathing in the Mediterranean.

Mainly North Cyprus can divide into 3 district regions.

1) Kyrenia, the area of north coast between the sea and besparmak mountains, where the majority of holiday complexes are found.

2) Famagusta, the ancient port with its long open beaches.

3) Nicosia and Morphou: The capital city and the western coast famous for its citrus groves.

The Hotels of North Cyprus are built 46 hotels in Kyrenia, 10 hotels in Famagusta and 4 hotels in Nicosia and Morphou.

3- DETERMINATION OF STRATEGIES

3-1 PRODUCT

Northern Cyprus has a limited but rather varied infra-structure of hotels. Most of the touristic places are, for the time being, concentrated around Kyreia and Famagusta, but it must not ignored that the magnificent Karpas peninsula will be developed as well in the coming years. There is a choice between five, four, three stars hotels and holiday villages which are used %68 by interviewee. Flats and traditional villas also exist at the seaside or in typically Cyproit villages which are used in terms of self

catering flat %6, rented houses %14 by interviewee. North Cyprus product satisfies the customers' needs by providing the core attributes effectively; wherever possible augmenting these with further added value. Most attractions provide additional facilities-shop, restaurants, car parks, banks, toilets, gymnasium, bus service etc which will appeal to the visitor and generate additional revenue/profits for the provider. TRNC visitor survey results of question 10(Do you think that the facilities are adequate in TRNC?)

Yes %30

1

th

No %70

Depend on these results, most of consumer mainly didn't be pleased the facilities which are dirty toilets, service quality in restaurant, cafe and transportation services. For service quality, Management should be controlled their staff because the "quality" rating of any attraction is closely linked to the quality of service provided by staff that is explained theother step of strategy in "people".

Question 14, toilets are taken bad rate by consumer. For this reason toilets numbers should be increased immediately and kept to clean everrytime especially at district of attractions. Otherwise sector revenue will not increase. When coming through the 21th century, sector has to complete these complain and look to the future for satisfaction by confidence.

-The importance of branding-

Successfull product presentation can be replicated through branding. Branding distinguishes a service from its competitors and by emphasizing its differentiation it acts as buying cue to prospective purchasers who find safety in its familiarity. Many hotel companies have explaited this strategy and it is increasingly being adapted in tourism. Just as Dedeman Olive Tree an example of branding for a holiday village in terms of the nature of its product and the assocaited environmental image.

There are a few hotels depends Ministry of tourism make a loss so that they have to privatize immediately. When doing these Employee and government rights should be equally protected during aggreement of privatization. Just as Salamis By Hotel an example of privatize by this way. Same application should be done the others hotels then new investments will be generate to increase their reveneu.

3-2 PROMOTION

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Firstly, promotional effects are directed at providing information to potential customers. Potential customers of TRNC are Germany, Turkey, Finland and Russia. Ministry of tourism will be expected to come 5 million tourists from these potential country including of tourism planning for next 10 years. How it can be achieved? TRNC won its indepence in 1974.But it has not recognized its indepedence the other country of world except Türkiye so that for effective promotion we should be joined to fairs thus we can tell face to face our culture, natural environment and history more effectively. And tourism information offices should be established especially in Turkey, Istanbul and Antalya .Thus customer can be taken more information about TRNC both authority and broushers. As before preparing broushers by ministry of tourism, it should be included to present of hotels facilities widely, determined slogans that show interest customer. After that historical, culturel and natural environment should be briefly explained and showed with photograph.

In fact, advertisement agencies or advisors must be used this promotion works which is less cost than set up special advertising departments.

3-3 PRICE

Pricing is the one element of the marketing mix that generates reveneu directly: all the others incur costs. There are 3 options concerning the price level.

- a) Equal to the market.
- b) Above to the market

c)Below to the market

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Equal to the market is the easiest in time and effort since it abdicates the decision to competitors. If on the basis of quality, image, features or reputation an attraction has no unique attributes then this in the long run may be an appropriate approach though it will not bring fame or fortune. Secondly, pricing above the market ,involves cansiderably more risk but can bring high rewards in terms of profits and status. Finally, pricing below the market may be necessary on some occasions to compesate for such disadvantageous factors as poor location or to increase market share if visitors are price concious. However in the same way that high prices may go outside the cunsomers top price thresold, customers may become suspicious if prices are below the market norm.

The over all pricing strategy decisions will need to be made regarding the use of an "all-in" price or seperate prices for each facility. These may involve price discrimination on the basis of age, family grouping party size and so on, or party of entry according to demand patterns or regularity of use (season tickets). All type accommodation prices are between 40 million TL and 90 million TL according to the result of Q6-b). The ministry of tourism did not cotrolled this type of accommodation price until 1996 and competition generated between each competitors. Now the ministry of tourism decided to control hotel prices. This procedure will be as follows, competitors will give to fix their price amount to the ministry. Then if it will find flexible by members of ministry, they can use their price. Thus hotels prices will be cotrolled by ministry. Approximately, consumers had spent between 30\$ and 70\$ goods and services. The type of goods and services are mostly drinking, eating, swimming, transportation, shopping.

Shopping price is fixed and there is no bargaining. However gold jewellery, leather clothes and textiles are sold at reasonably cheap prices.

Transportation prices, customers was chosen car rental %24, public bus or mini bus %26 because of ticket price which are very reasonable. Taxi prices are very expensive and there are nocounters. For that reason authorities have to warn visitors who ask for the price before departure during their visiting. The ministry of tourism has planned to use taximeter which will be reliable as soon as possible.

3-4 PLACE

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Accessibility is one of the major determinants of success in tourism. According to the result of Q7, Kyrenia would visit %40, Famagusta would visit %26 and Nicosia would visit %12 by interviewee. And they had visited some attraction which are briefly writting in Appendix. The average attraction must be well situated in terms of transport facilities, customer flows, and its environs if it is to attract viable numbers. There are not overcome the location drawbacks. But transport facilities are not enough because of bus departures are only between big and smaller town so that customer do not go to the attraction location. And public transport service is reduced after 5 pm and during the week-end. Mainly, in the summer months (May to September) the bus service system must be improved after 5pm and during the week-end and supplied to service Bellapais and Salamis.

3-5 PEOPLE

There is increasing evidence to suggest that the "quality" rating of any attraction is closely linked to the quality of service provided by staff.

Results of Q12 most of interviewee dislike the service quality. For this reason staff is being insufficient, quality rating is reduced. For continous satisfaction staff training is necessary. Commitment, courtesy and care are the hallmarks of good recruitment, training and people management. Thus quality and productivity will be improved, sector will able to compete in the world market. The positive effect on staff morale is mirrored in the improvement of the bottom line. The ethos and atmosphere of the attraction is set

by the people working in it and their interface with visitors.

3-6 PHYSICAL FEATURES

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Pysical features are dominating influence in all attractions and will vary according to whether

they are natural or built. If natural, the features will be central to their appeal. But man-made attractions may originally have been built far removed from tourism(for example, castles and historic houses) and will since have been adapted various ways. In Famagusta, such as The old town, designers will have been used and enhanced pyhsical features with clever design and interpretation so that the final product has a different ethos and appeal. When doing this, architecture and artifacts have to preserved history so that visitors are able to appreciate the original features.

Purpose-built tourism attractions need to weld ergonomic functional features with the desired ambience and image. It is a highly skilled activity and depends on good design that meets the established criteria of "fitness for purpose". In this frame, Saray hotel that is placed in center of Nicosia serviced espacially for diplomatic community, it has to be rebuilt its external and internal features have to be done the aesthetics of style, decor and color.

4- CONCLUSION

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When coming to the 21th. century North Cyprus may be loosed their preference because of S-300 rockets that may settle in South Cyprus. And this will be a big disadvantage for island like in 1974.

At Global level, continous quality is depended education of people. Thus North Cyprus tourism sector will provide to improve income and productivity with quality otherwise it will stand back of world competition.

Transportation is a big problem for sector that is supplied by plane or boat. And it has direct air links only with Turkey. Cyprus Turkish airlines which is the biggest airlines company organize to fly from/to North Cyprus. When coming North Cyprus it has a complaint, planes are not fulled so managers do not organize to fly much more. The other words they have not gained revenue from those flights. An example from South Cyprus lived same problems but companies that organized to fly did not gain revenue in 1996. Despite of damage, companies transported 2 million people in South Cyprus. And this system should be acceptable for TRNC tourism sector transportation. Finally this problem will be solved an agreement between TRNC government and Cyprus Turkish Airlines managers.

5- APPENDIX

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Visitor number	Age (X1)	Before visited(X2)
(1)	(2)	(3) 0=no, 1=yes
1	55	1
2	50	1
3	22	0
4	19	0
5	38	1
2 3 4 5 6 7 8 9	46	1
7	65	0
8	21	0
9	19	0
10	70	1
- 11	54	1
12	58	1
13	49	0
14	41	0
15	35	1
16	37	1
17	18	0
18	26	0
19	54	1
20	48	1
21	35	1
	22	

22	49	1
23		0
24	45	0
25		0
26		
27		
28		0
29		0
30		1
31		1
32		1
33		1
34		0
35		1
36		0
37		0
38		1
39		1
40	18	0
41	51	1
42	47	1
43	31	0
44	39	0
45	30	0
46	25	0
47	24	0
48	27	0
49	50	1_
50	55	1

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Central Tendency(X1) =40.5 Central Tendency(X2) =0.52 StandardDeviation(X1)=3.76 Standard Deviation(X2)=0.4995

Visitor Q9)Which attraction have you visited on TRNC today? Number Port of Kyrenia 1 Bella Pais, Beaches of Kyrenia 3 St. Nicolas Cathedral, Salamis, Beaches of Famagusta The Old Town. 5 Port of Kyrenia 6 The Monastry of St. Mamas, Vouni Palace Beaches of Kyrenia, Bella Pais, Dervish Pasha konagi 8 The Monastry of St. Mamas, Vouni Palace. 9 Salamis, swimming. 10 Selimiye Mosgue(St. Sophia Cathedral), Mevlana tekke, Bella Pais, Port of Kyrenia. 11 The Lusignan castle, Ship museum, Part of Kyrenia 12 BellaPais, The port of Kyrenia, The Lusignan castles, Ship museum. 13 St. Nicolas Cathedral, The Old Town, Salamis. 14 The Old Town, St. Nicolas Cathedral, Swimming. 15 The Port of Kyrenia, Bella Pais, Ship Museum. 16 Selimiye Mosque, Mevlana Tekke, The Bedesten. 17 Visiting Lefke. 18 The Lusignan castle in Karpas peninsula. 19 Bella Pais, The port of Kyrenia, Ship museum, The Lusignan castle in Kyrenia. 20 Beaches of Famagusta. 21 St. Sophia cathedral, Büyük han and Kumarcilar han, Vouni palace, The monastery St. Mamas. The port of Kyrenia, Ship museum. 23 Salamis, St. Nicolas Cathedral, Beaches of Famagusta 24 St. Nicolas Cathedral, The old town, Kyrenia Beaches 25 Dervish pasha konagi, The bedesten, Selimiye mosque Kyrenia beaches. 26 Visiting Lefke.