

OUTLINE

- The Importance of Tourism for Development
- Tourism Trends
- Overview of International Tourism in the World
- International Tourism in the OIC Member Countries

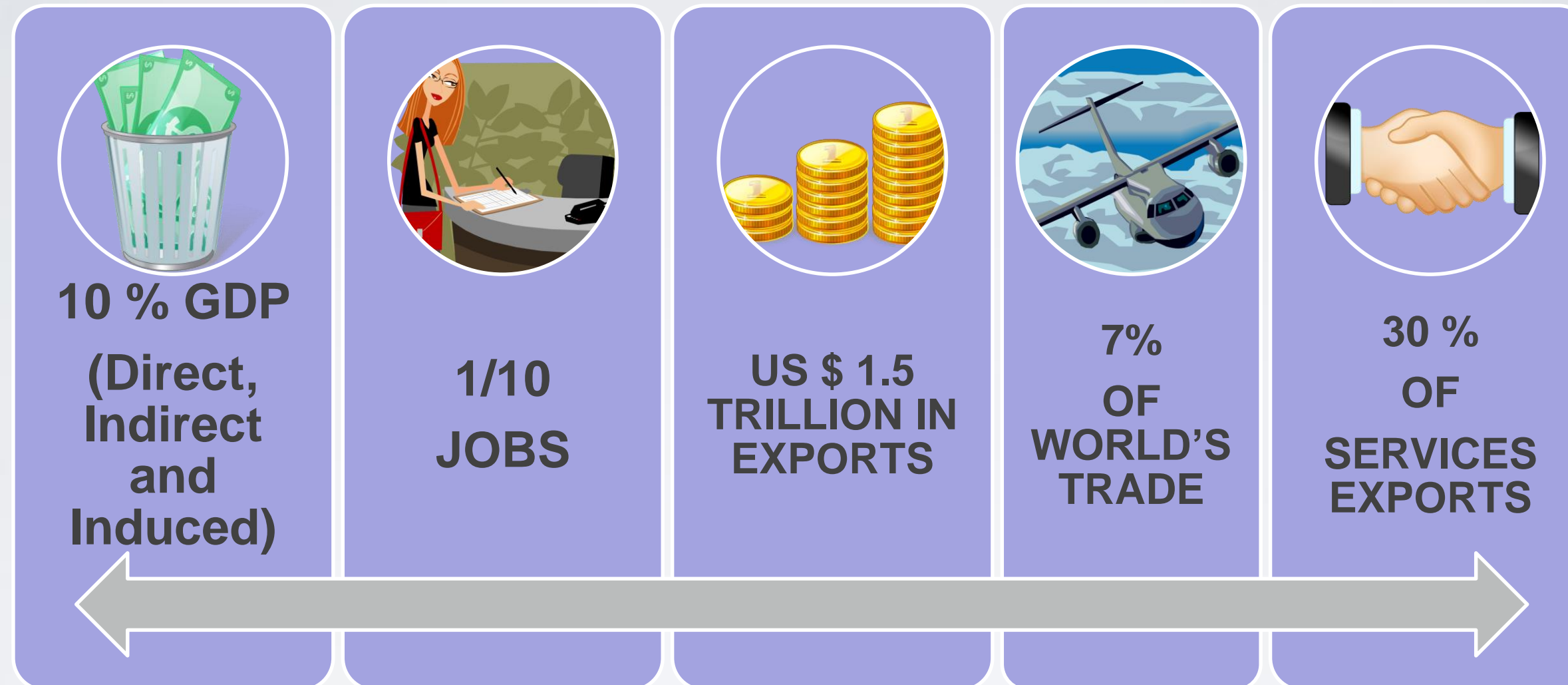
The Importance of Tourism for Development

A remarkable
socio-economic
phenomena

A critical sector
for both
advanced and
developing
economies

Related to more
than 185 supply-
side economic
activities, with
direct and
indirect effects

The Importance of Tourism for Development



Source: UNWTO Tourism Highlights, 2018 Edition

Key Tourism Trends

- Demographic changes
- Behavioral changes
- Advancements in technology
- Crises and risk management
- Sustainability

Source: Horwart HTL Tourism Megatrends, 2016

Demographic Changes



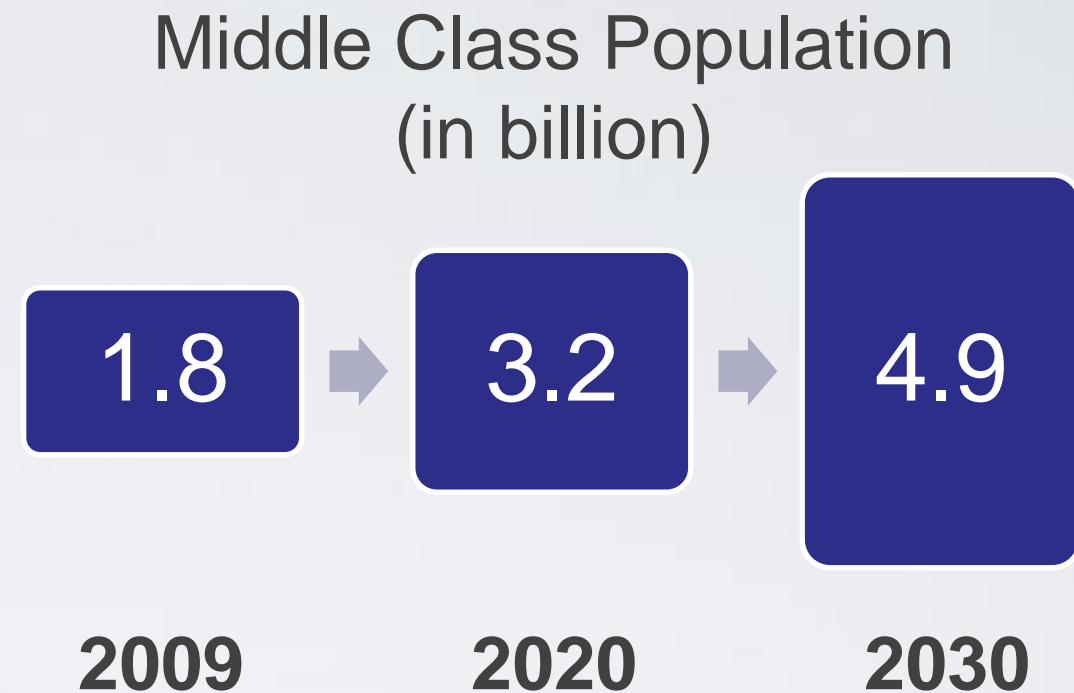
Share of global population
over the age of 60



- Active travelers
- Security is important
- Personalized services
- Soft adventure for «feeling young»
- Health, sport and wellness products

Source: Horwart HTL Tourism Megatrends, 2016

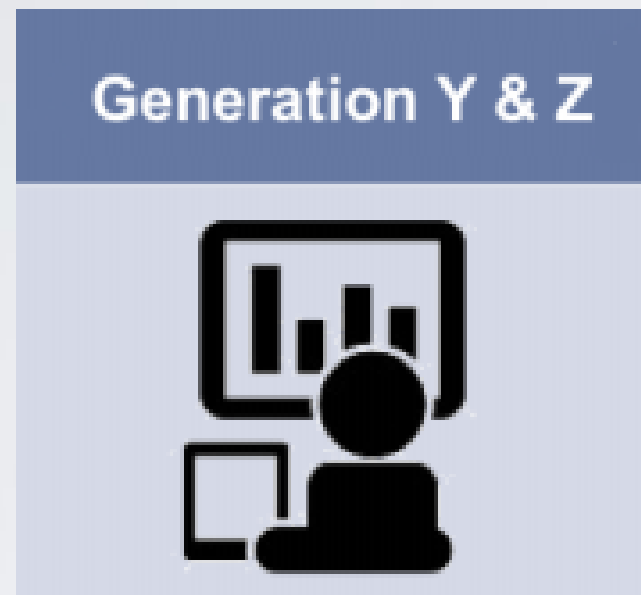
Demographic Changes



- The increase in average income results in a growing middle class
- Emerging source markets

Source: Horwart HTL Tourism Megatrends, 2016

Demographic Changes



Generation Y (Millennials)

- 50 % of all travelers by 2025
- Technology is essential!!!

Generation Z (iGen – 6-20 ages)

- Spend parents' money faster
- High level of involvement in digital trends
- A more dynamic lifestyle

Source: Horwart HTL Tourism Megatrends, 2016

Behavioral Changes



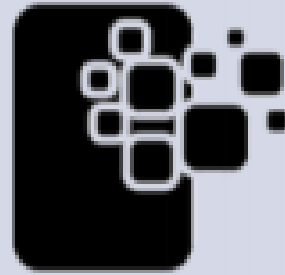
- Increase in the share of emerging economies
- 10 cities are from the Middle East and Asia in the top 20 global destinations by international overnight visitors.



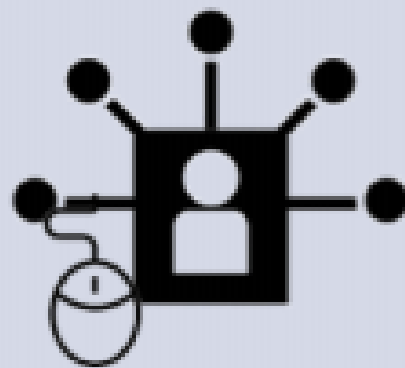
Source: Horwart HTL Tourism Megatrends, 2016

Advancements in Technology

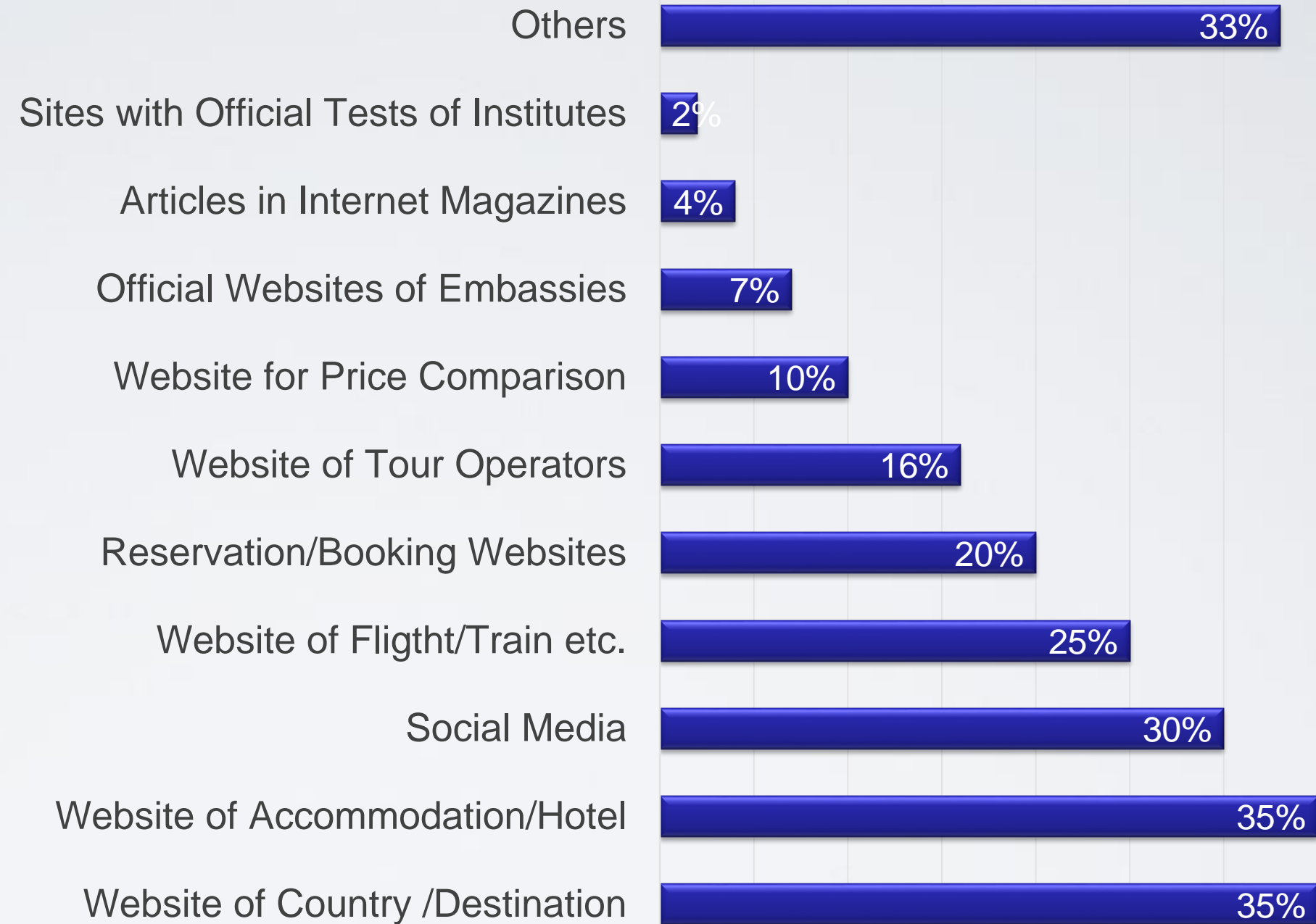
Technological (r)evolution



Digital channels



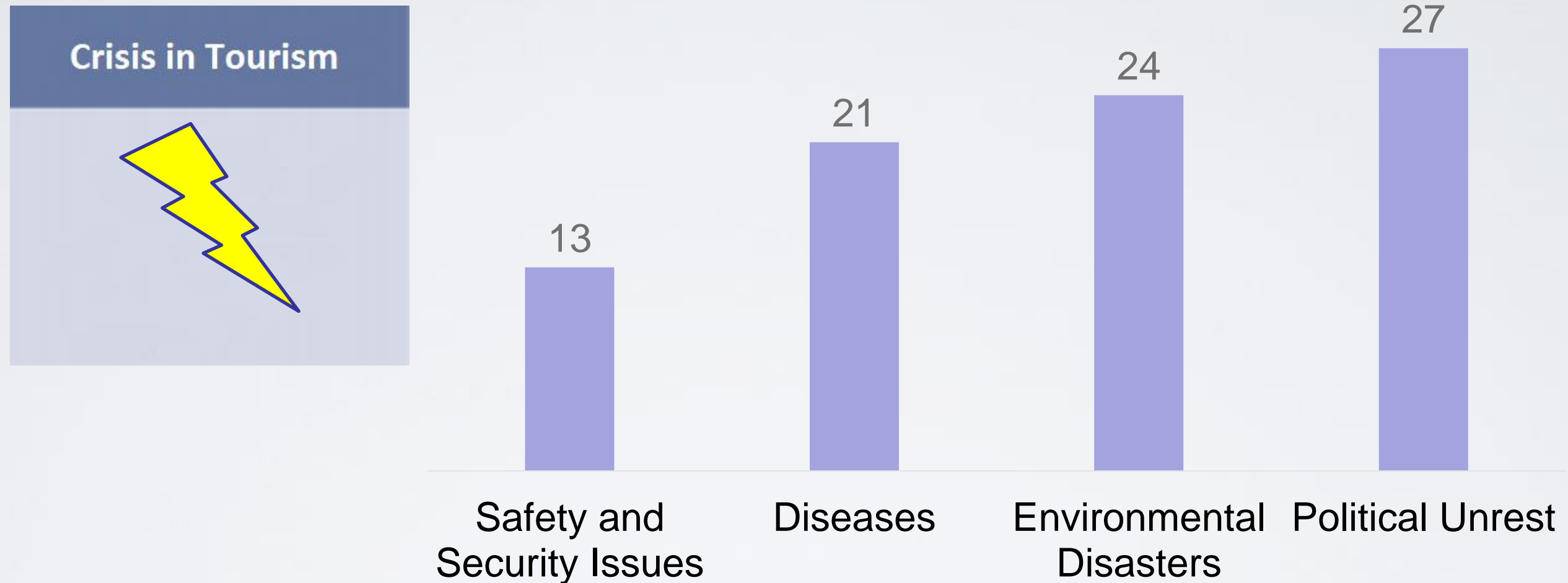
INTERNET INFORMATION SOURCES



Source: ITB World Travel Trends Report 2015-2016

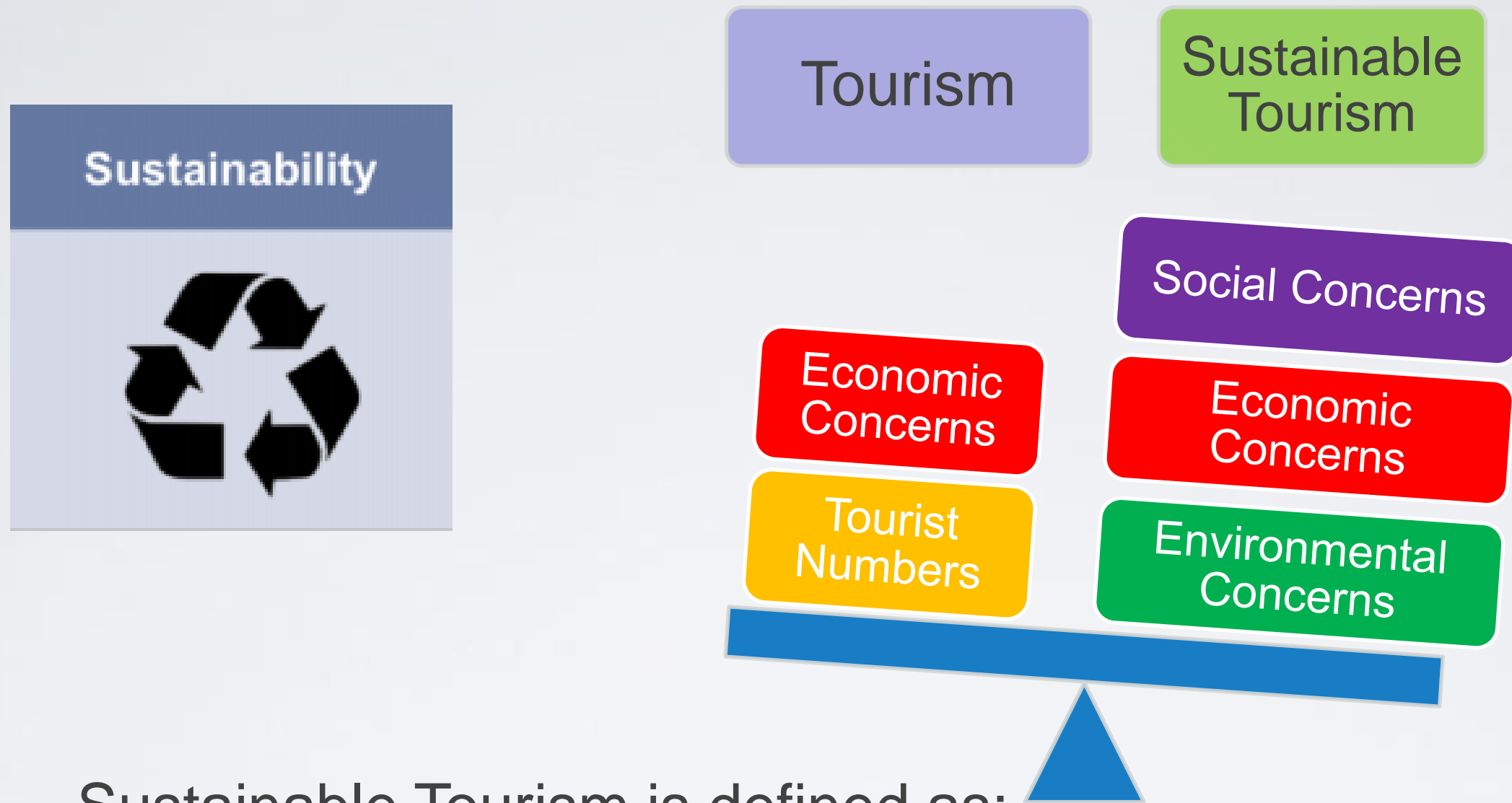
Crises and Risk Management

Time to Recover from Crises for Tourism (months)



Source: WTTC, 2016

Sustainability



Sustainable Tourism is defined as:
« tourism that respects both local people and the traveler,
cultural heritage and the environment»

International Tourist Arrivals

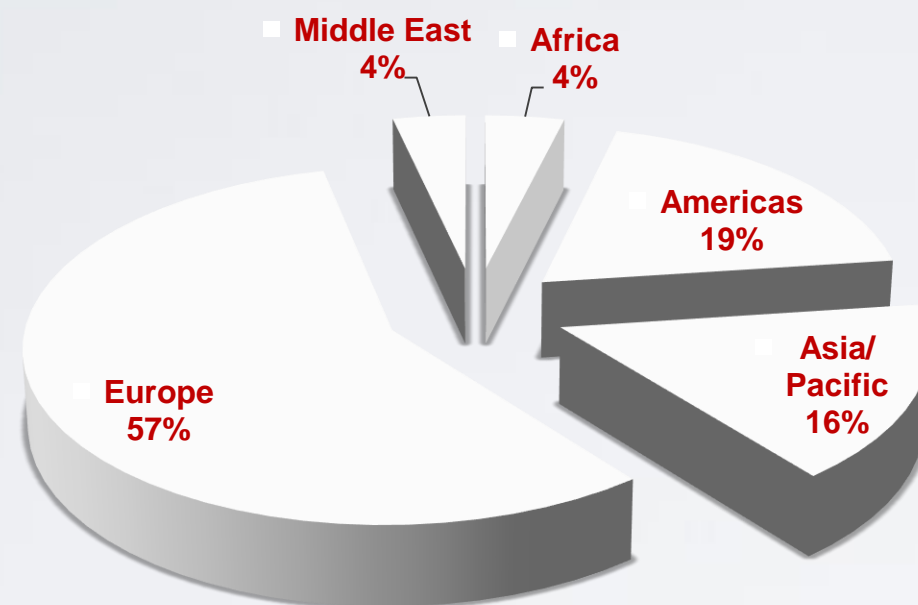
(Millions)



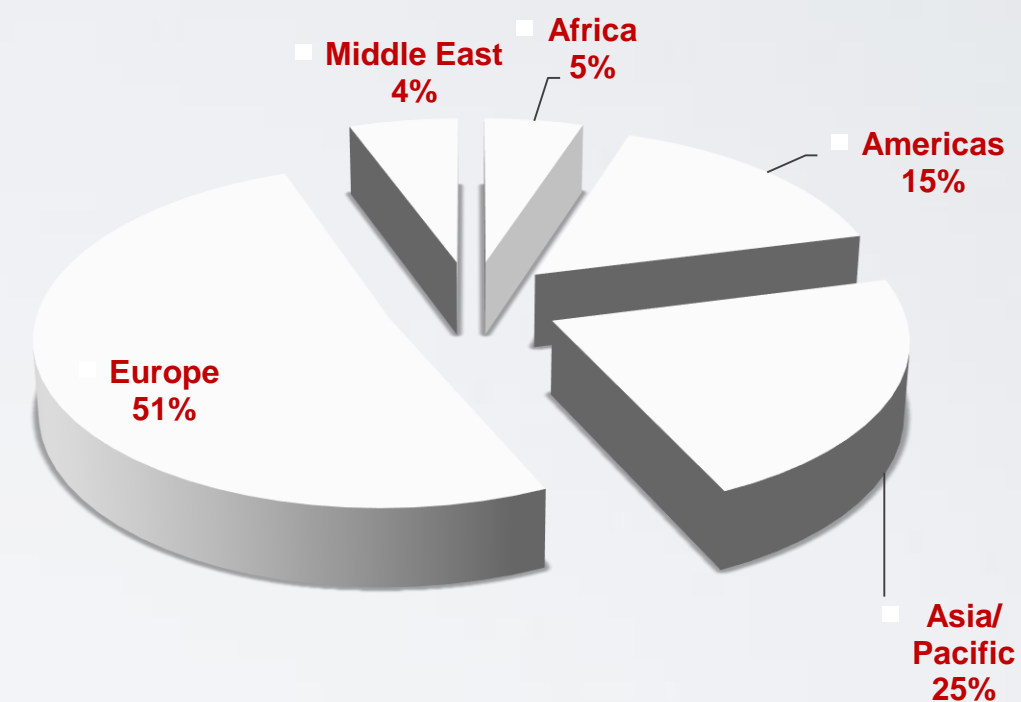
Source: World Tourism Organization

International Tourism- Market Share

Tourist Arrivals



2000

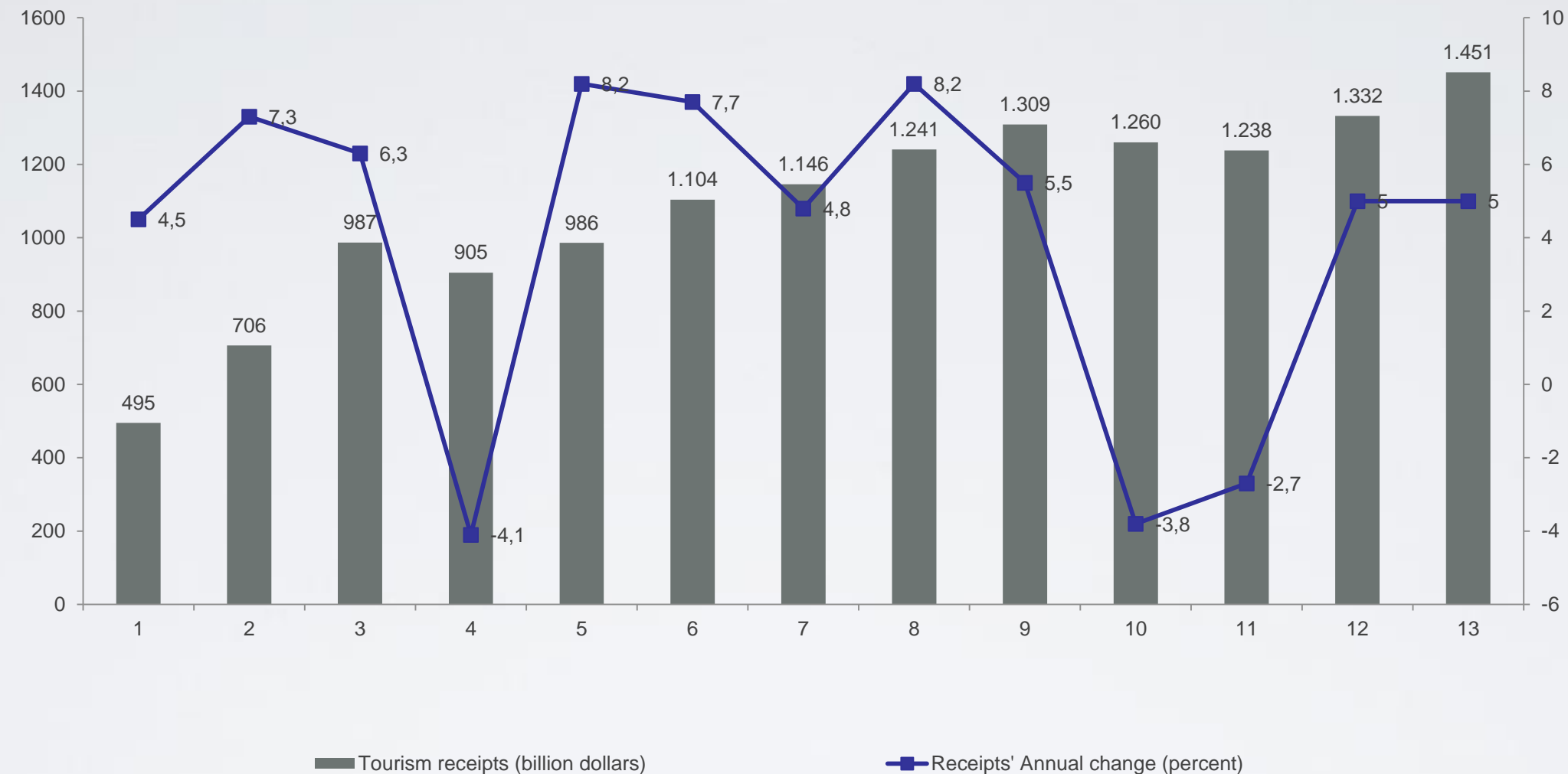


2018

Source: UNWTO, Tourism Highlights 2018 & World Tourism Barometer, Volume 19, Jan 2019

International Tourism Receipts

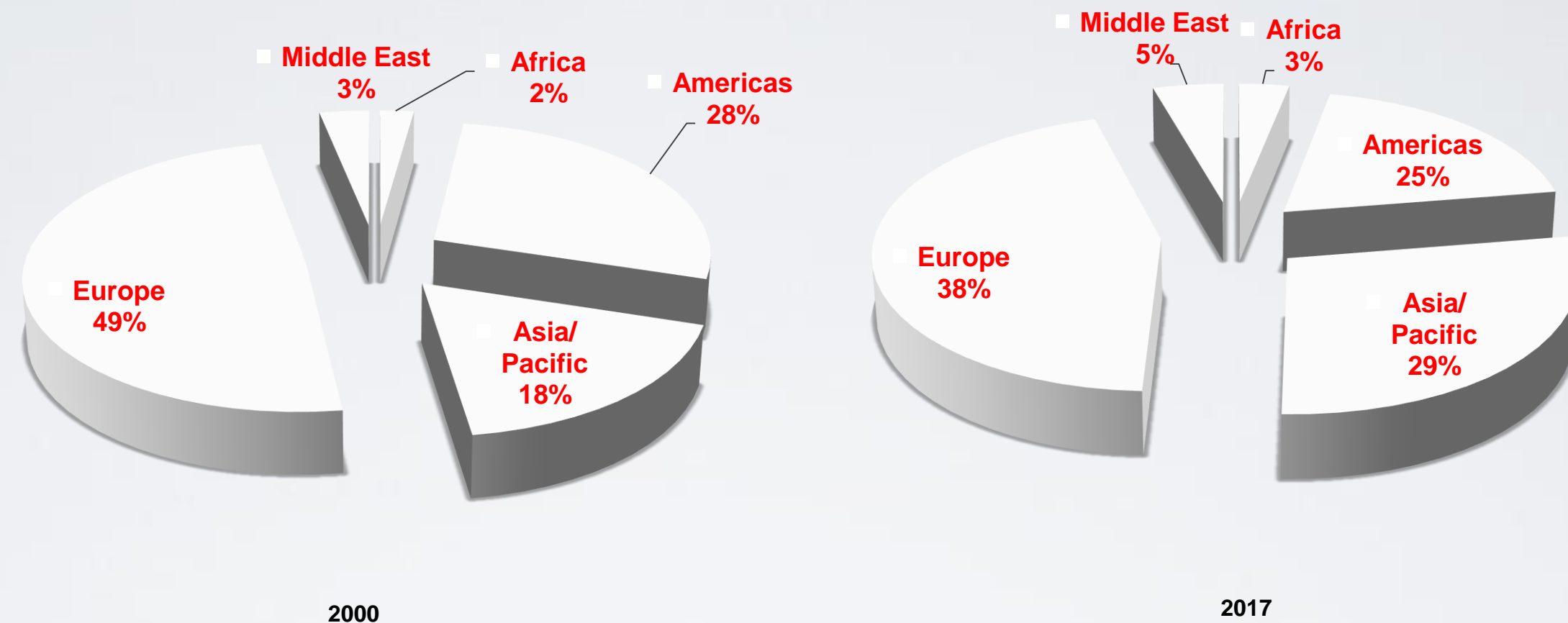
(Billion \$)



Source: World Tourism Organization

International Tourism Market Share

Tourism Receipts



Source: UNWTO, Tourism Highlights 2014 & World Tourism Highlights 2018

Estimates and Forecasts for Travel&Tourism Economic Impact in OIC Member States

COMCEC	2018 \$ billion ¹	2018 % of total	2019 Growth ²	2028 \$ billion ¹	2028 % of total	Growth ³
Total contribution to GDP	589.3	8.8	5	926.1	9.2	4.7
Total contribution to employment ⁴	44.2	7.3	2.6	57.588	7.7	2.7
Leisure spending	293.5	2.5	5.0	477.8	2.5	4.5
Business spending	93.2	0.8	3.2	152.5	0.8	4.7
Capital investment	104.4	6.3	3.9	183.0	7.1	5.4

¹2017 constant prices and exchange rates; ²2017 real growth adjusted for inflation (%); ³ annual real growth adjusted for inflation; ⁴000 jobs
Source: WTTC, Economic Impact 2018 Report-COMCEC

International Tourism in the OIC Member Countries

(Millions)

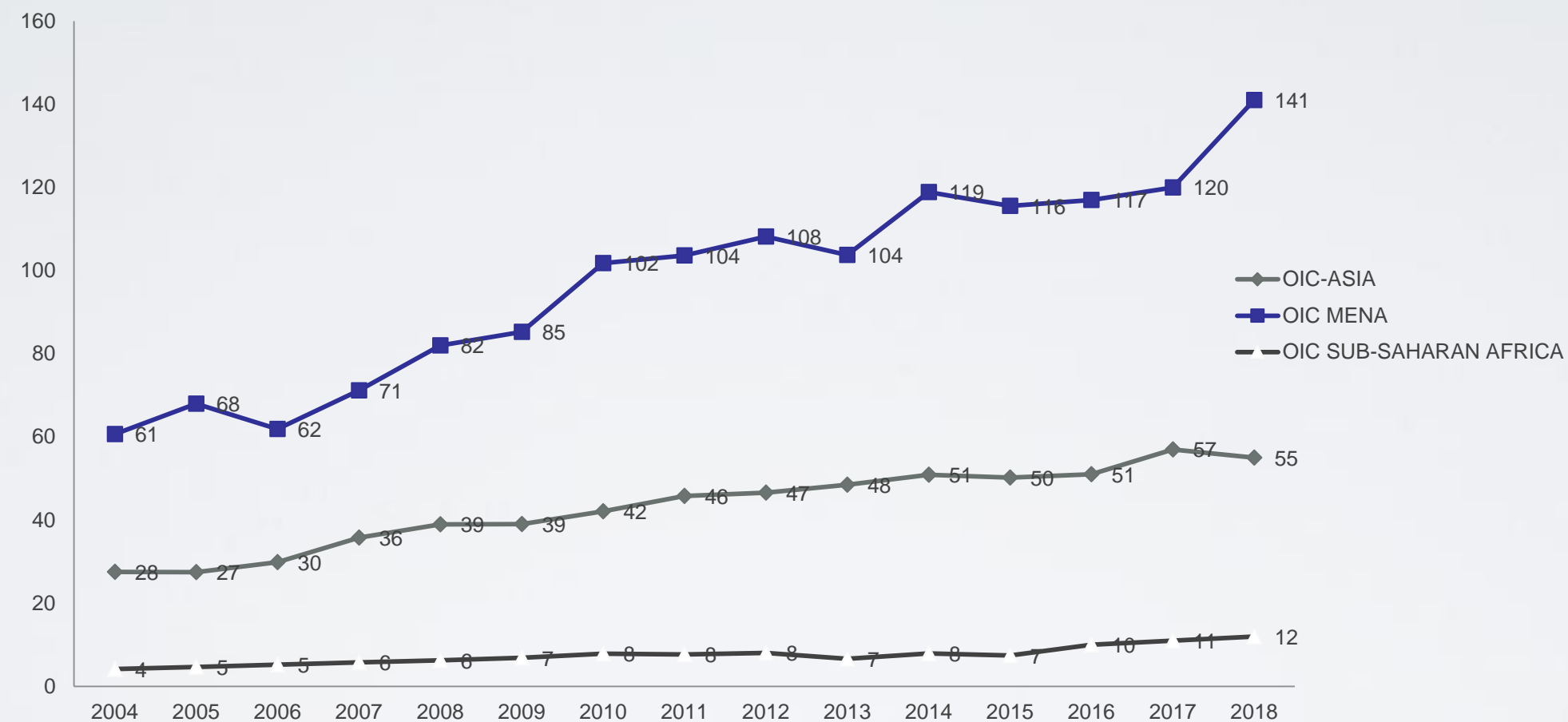
(Billion \$)



Source: UNWTO, 2019 (Last available data for OIC countries were used)

Tourist Arrivals in OIC Regions (OIC-MENA, OIC-Asia, and OIC-Sub-Saharan Africa)

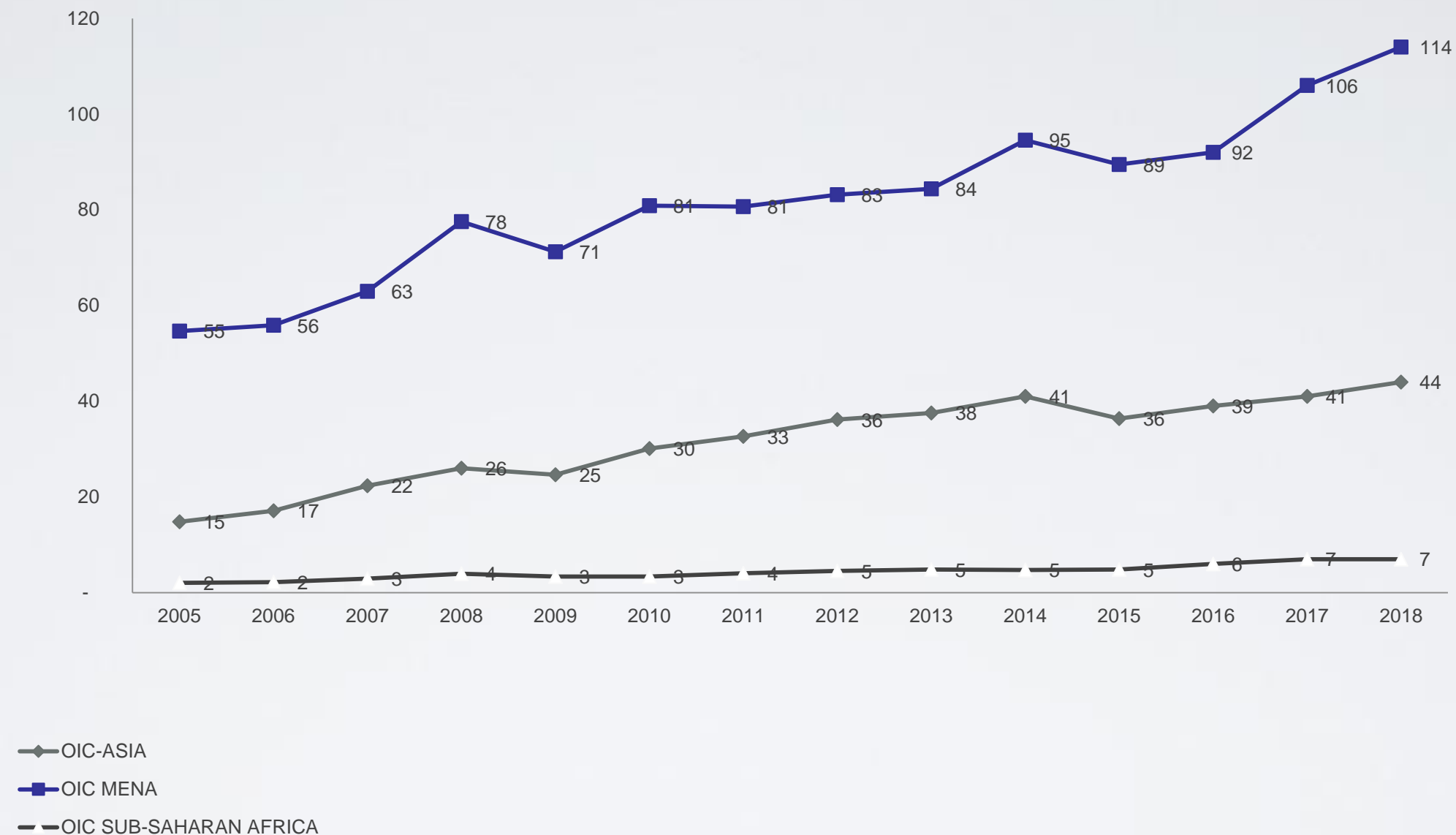
(Millions)



Source: UNWTO, 2018

Tourism Receipts in OIC Regions (OIC-MENA, OIC-Asia, OIC-Sub-Saharan Africa)

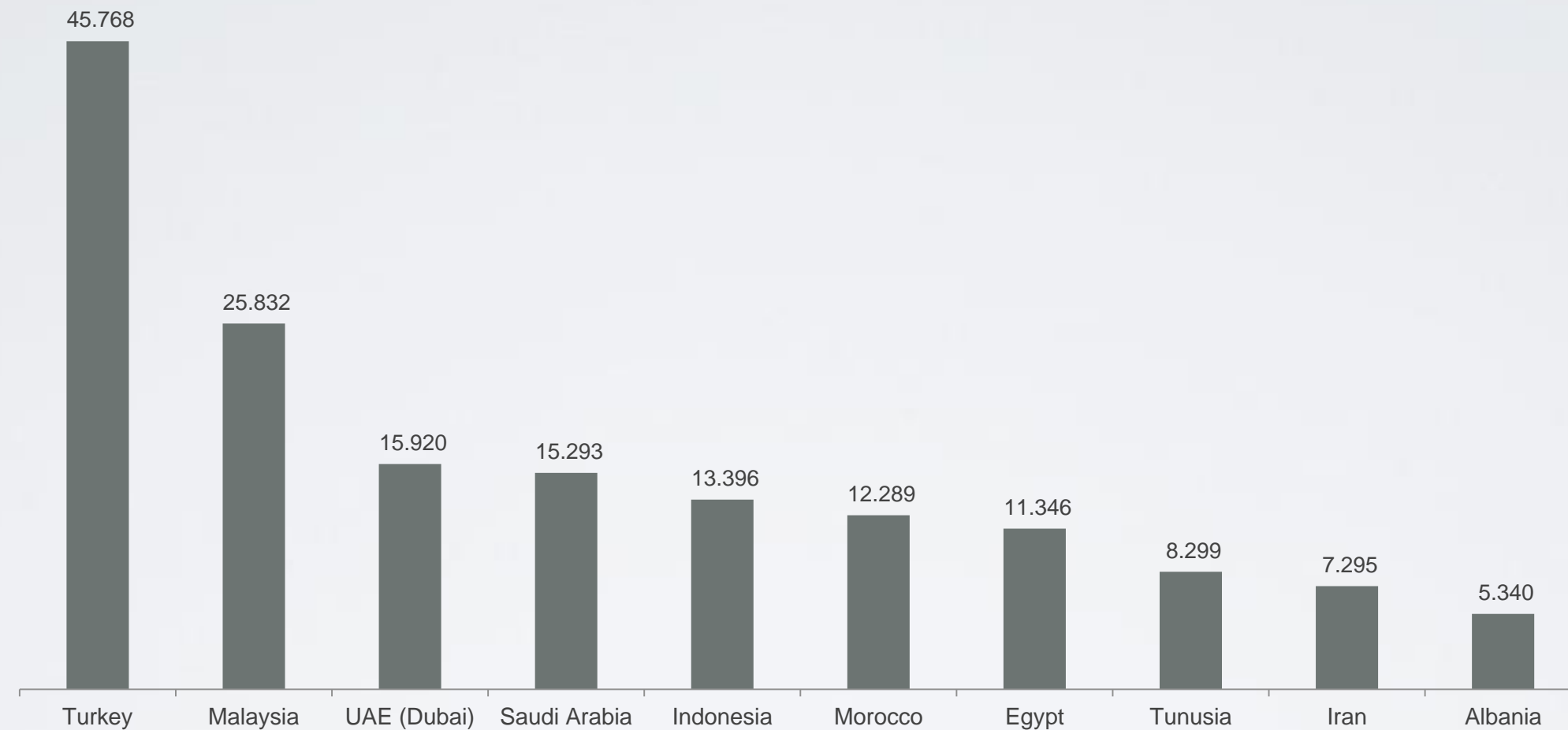
(Billion \$)



Source: UNWTO, 2019

Top 10 OIC Tourism Destinations in International Tourist Arrivals (2017)

(Thousands)

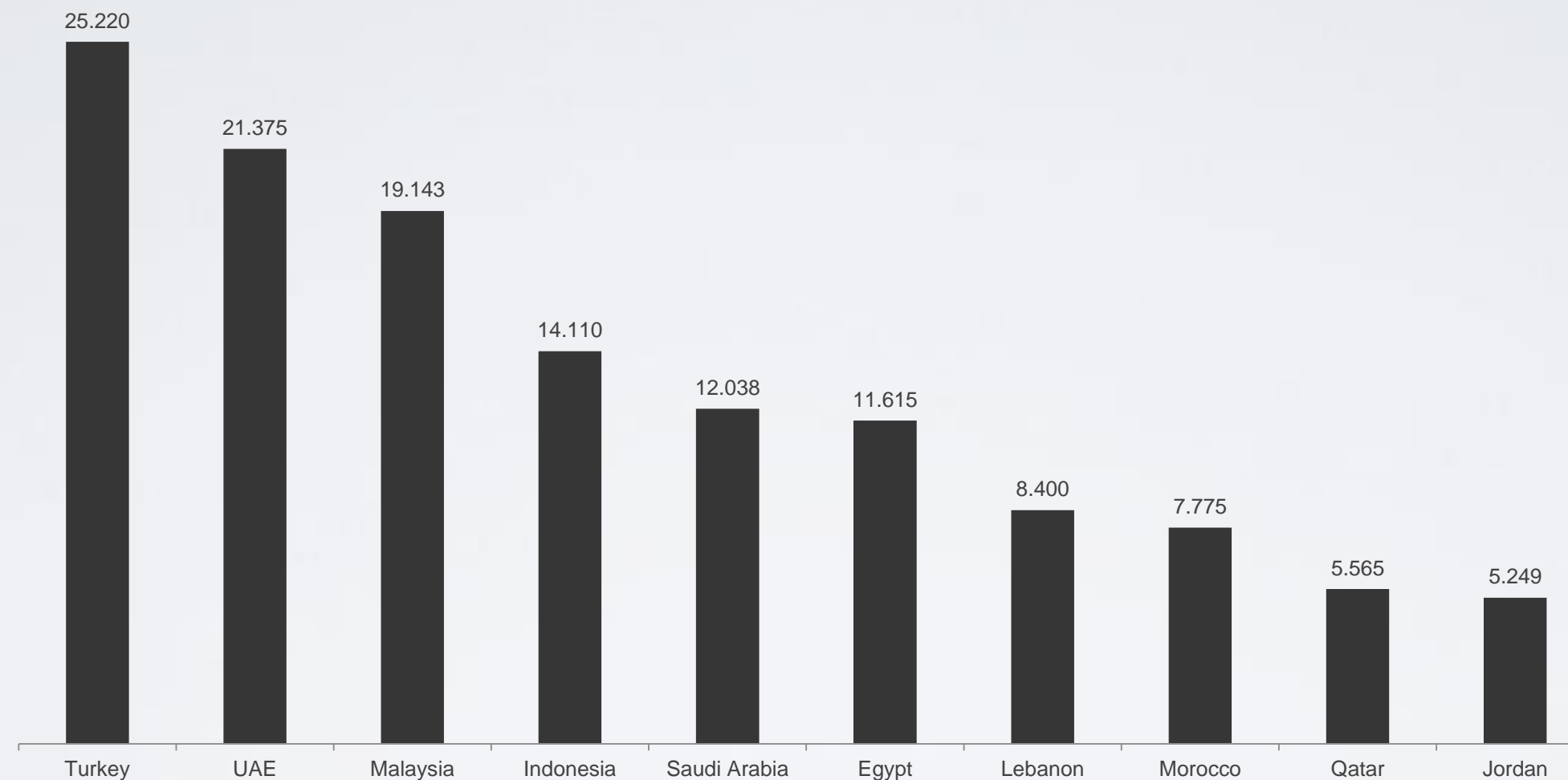


Source: UNWTO, Tourism Highlights 2019 & Tourism Barometer Volume 14, July 2019

❑ Top-10 countries hosted **161 million international tourist** in 2018.

Top 10 OIC Tourism Earners in International Tourism (2017)

(Billion \$)



❑ Top-10 countries earned **US\$ 130 billion** as international tourism receipts in 2018.



COMCEC

Recent Developments in the OIC Member Countries

- ▶ **Turkey** recorded 22% increase in arrivals and 12% increase in receipts in 2018.
 - ▶ Improved demand from Asia and Africa.
 - ▶ Exchange rate fluctuations.
 - ▶ Recovery effects.

Source: UNWTO, 2017

Recent Developments in the OIC Member Countries

- ▶ **Malaysia** had a stable year with 19 billion USD receipts and 26 million arrivals in 2018.
 - ▶ Proximity to potential generating regions.
 - ▶ Launched e-visa service for visitors from China.
 - ▶ New air connections
 - ▶ Invested in rural tourism

Source: UNWTO

Recent Developments in the OIC Member Countries

- ▶ **UAE recorded** 7% increase in arrivals and 2% increase in receipts in 2018.
- ▶ Despite **Saudi Arabia** reported a 15% decrease in arrivals and receipts had a stable year around 12 billion USD.
- ▶ **Indonesia** had a 7% increase in receipts in 2018.
- ▶ **Morocco** enjoyed a 8% increase in arrivals and 4% increase in receipts in 2018.
- ▶ **Egypt** realized significant increase (37%) in arrivals and receipts (50%) in 2018.

Source: UNWTO

Recent Developments in the OIC Member Countries

- ▶ **Tunisia** recovered the effects of crises and posted a 18% increase in arrivals and 31% in receipts in 2018.
- ▶ **Iran** had a large increase (50%) in arrivals.
- ▶ **Albania** enjoyed double digit (15%) growth in arrivals and 13% increase in receipts.
- ▶ **Turkmenistan** (190%), **Palestine** (21%), **Algeria** (10%), **Jordan** (8%), **Maldives** (7%) **Azerbaijan** (6%), and **Lebanon** (6%), are other OIC countries enjoyed significant increase in arrivals in 2018.

Source: UNWTO

Tourism Opportunities and Challenges for the OIC Member Countries

Opportunities

- ☐ Natural Resources
- ☐ Cultural Resources
- ☐ Human Resources
- ☐ Authenticity and novelty
- ☐ Price competitiveness
- ☐ Dynamism

Challenges

- ☐ Insufficient Tourism Investment & Infrastructure
- ☐ **POOR DESTINATION PLANNING & PRODUCT DEVELOPMENT**
- ☐ Travel Facilitation Problems
- ☐ Safety and Security Related Problems
- ☐ Low Tourism Service Quality
- ☐ **INSUFFICIENT MARKETING AND PROMOTION**
- ☐ Insufficient Image Building and Branding
- ☐ **LACK OF TOURISM DIVERSIFICATION**

Destination Management Organizations

Multi
Destination
Tourism
Corridors
(2019-II)



Developing Medical Tourism in OIC (2020-1)



For Building an Interdependent Islamic World

www.comcec.org



Gurel CETIN, PhD

Comcec Coordination Office

October, 2019