



Making Cooperation Work

COMCEC STRATEGY

For Building an Interdependent Islamic World

COMCEC TOURISM OUTLOOK 2014 (Revised Edition)



COMCEC

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OUTLINE

- ▶ The Importance of Tourism for Development
- ▶ Overview of International Tourism in the World
- ▶ International Tourism in the OIC Member Countries
- ▶ Tourism Opportunities and Challenges in the OIC Member Countries

The Importance of Tourism for Development

- ▶ A remarkable socio-economic phenomena
- ▶ A critical sector in 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



9 % GDP
(Direct,
Indirect and
Induced)



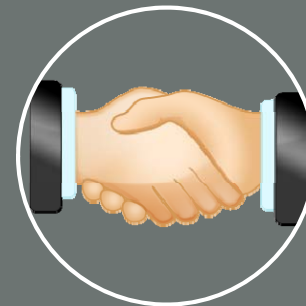
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JOBS



US \$ 1.4
TRILLION IN
EXPORTS



6%
OF
WORLD'S
TRADE



29 %
OF
SERVICES
EXPORTS



Source: UNWTO Tourism Highlights, 2014 Edition

Key Tourism Trends in the World

- ▶ Annually 43 million increase (by 3.3% a year) in international arrivals
- ▶ Increase in the weight of emerging economies
- ▶ 57% int. arrivals ➡ Emerging destinations (2030)
- ▶ Travel between regions vs. Travel within the same region
- ▶ Increase in air transport, but at a much slower pace

Key Tourism Trends in the World

Sustainability

- ▶ Sustainability will be more important than ever.
- ▶ The concept of «**Green Economy**» will gain importance for tourism sector.

Key Tourism Trends in the World

Technology

- ▶ Internet has given power to the consumer.
- ▶ Electronic media (CD-ROM maps, Internet, web sites, etc.)

TECHNOLOGY

- E-tickets
- Improved air and ground traffic handling
- New border control systems
- Waste reduction
- Energy efficiency
- Low air travel costs

Key Tourism Trends in the World

Changing Consumer

- ▶ More experienced and demanding customers
- ▶ Demographic change (ageing, migration and diversification of family structure), changing values and lifestyles
- ▶ Increasing middle classes in emerging economies

Key Tourism Trends in the World

Changing Consumer

- ▶ Singles and couples without children, and 65+ (“the third age”) groups
- ▶ Decrease in average working time, more time for vacation
- ▶ Consumers will be informed and protected within the framework of universal systems

Key Tourism Trends in the World

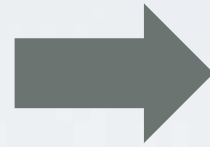


Source: UNWTO Tourism Highlights, 2014 Edition

Key Tourism Trends in the World

- ▶ New destinations will gain importance.

3S



3E

Sun-Sand-Sea

Excitement-
Education-
Entertainment

- ▶ Low-cost accommodations will be the next trend.

International Tourist Arrivals

(Millions)



* Forecast

Source: World Tourism Organization

International Tourist Arrivals (%)



Source: UNWTO, World Tourism Barometer, Volume 12, June 2014

International Tourist Arrivals

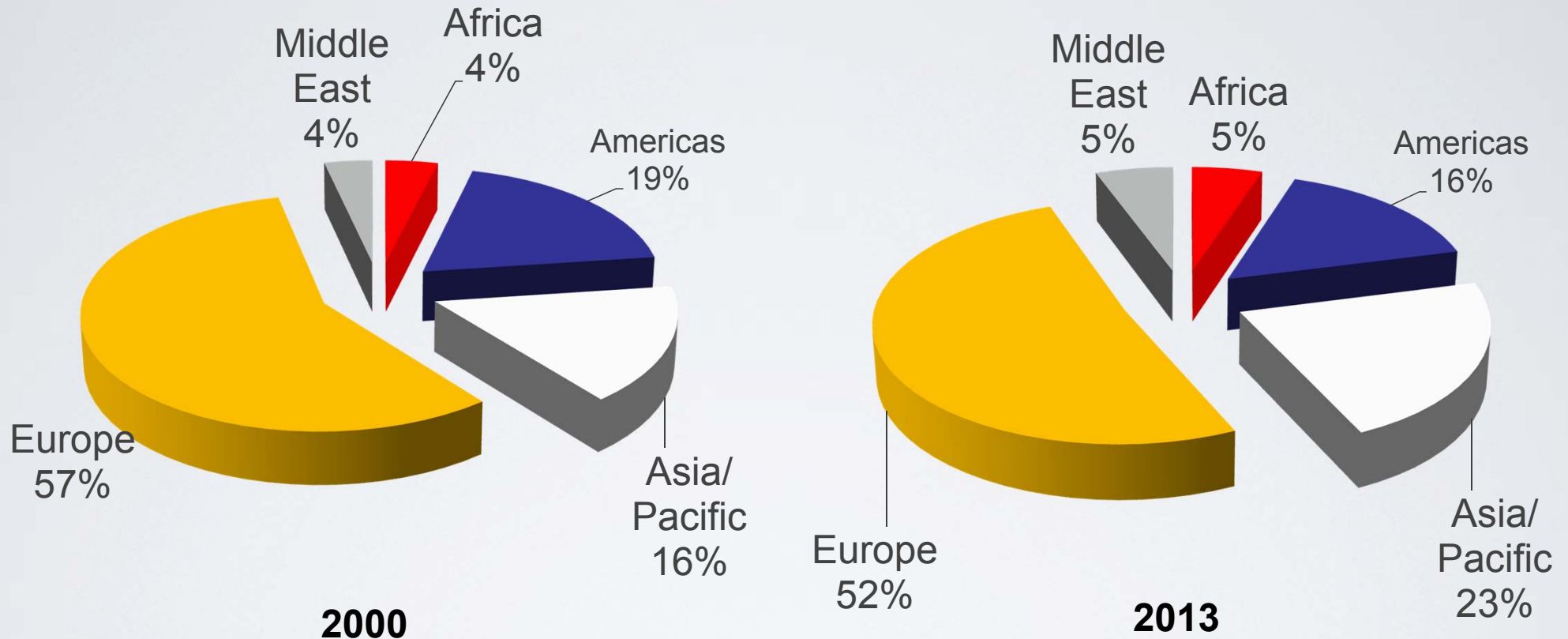
(Millions)

Tourist Arrivals	2000	2011	2012	2013
World	677	995	1.035	1.087
Europe	388.0	515.6	534.1	563.8
Asia and Pacific	110.1	218.5	233.5	248.7
Americas	128.2	156.1	162.7	168.2
Africa	26.2	49.7	53.0	55.9
Middle East	24.1	54.7	51.1	50.8

Source: UNWTO, World Tourism Barometer, Volume 12, June 2014

International Tourism- Market Share

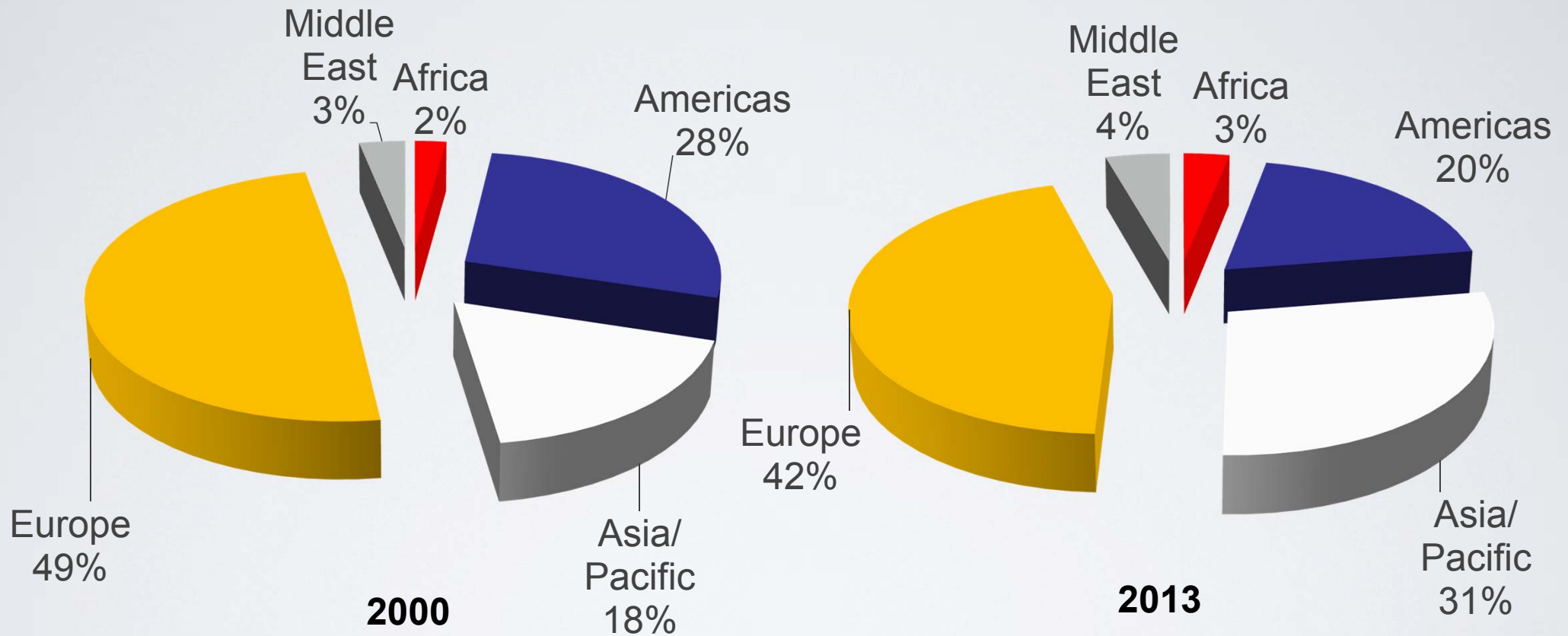
Tourist Arrivals



Source: UNWTO, Tourism Highlights 2014 & World Tourism Barometer, Volume 12, June 2014

International Tourism- Market Share

Tourism Receipts



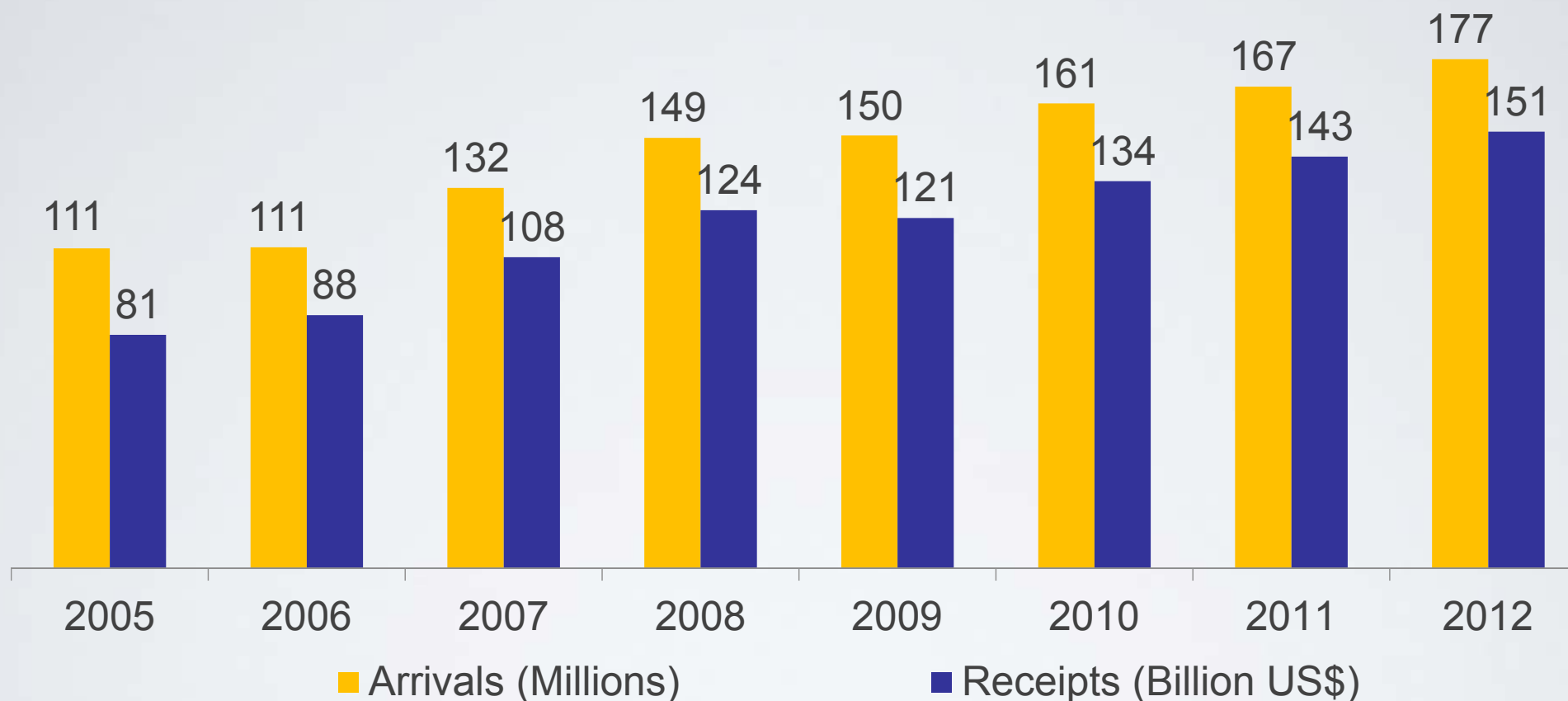
Source: UNWTO, Tourism Highlights 2014 & World Tourism Barometer, Volume 12, June 2014

International Tourism Receipts (US \$ Billion)

Tourism Receipts	2000	2012	2013
World	475	1.078	1.159
Europe	235	454	489
Asia and Pacific	87	329	360
Americas	133	213	229
Africa	11	34	34
Middle East	13	47	46

Source: UNWTO, Tourism Highlights 2002&2013 Edition& Tourism Barometer June 2014

International Tourism in the OIC Countries



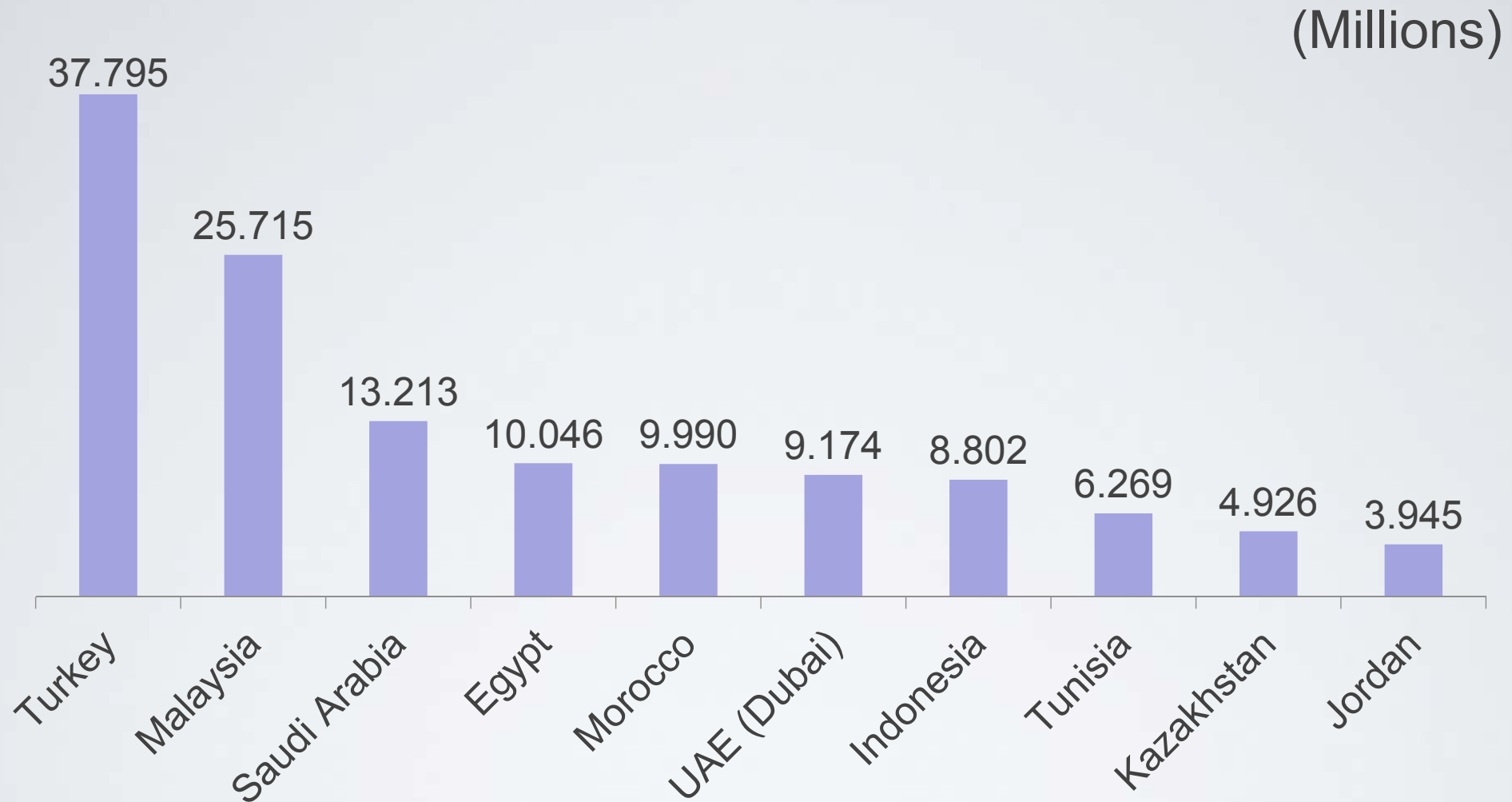
Source: Adopted from SESRIC, 2014

International Tourism in the OIC Countries



Source: Adopted from SESRIC, 2014

Top 10 OIC Tourism Destinations in International Tourist Arrivals (2013)



□ Top-10 countries hosted **129.9 million international tourist** in 2013.

Top 10 OIC Tourism Earners in International Tourist Arrivals (2013)

(Billion \$)



* 2012 data

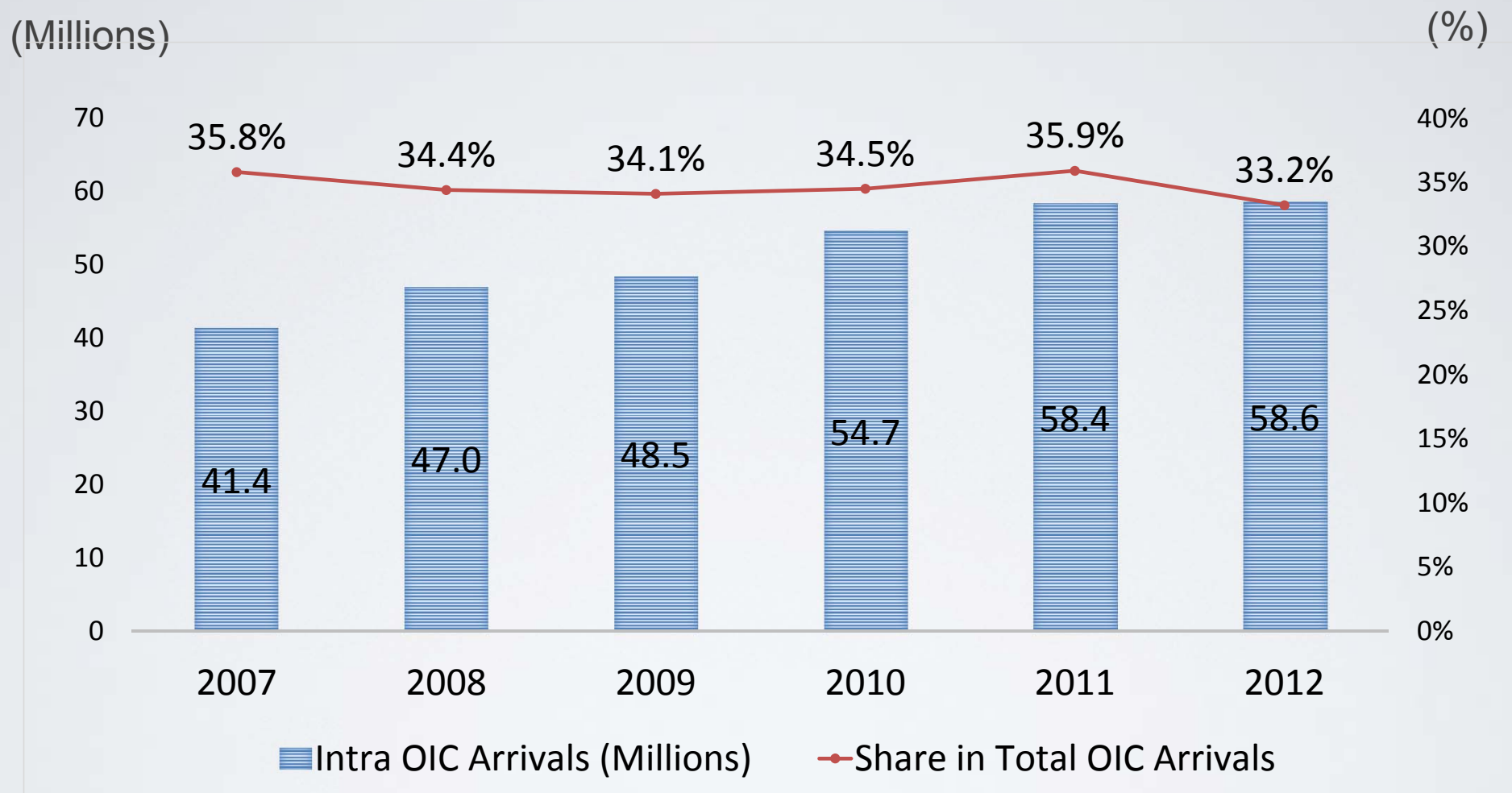
□ Top-10 countries earned **US\$ 105.5 billion** as international tourism receipts in 2013.

Member Countries by Major Surplus on the Travel Balance In 2013 (US\$ billion)

	Tourism Receipts			Tour. Expenditures			Balance		
	2011	2012	2013	2011	2012	2013	2011	2012	2013
Turkey	25.1	25.3	28.0	4.9	4.1	4.8	20.2	21.3	23.2
Malaysia	19.7	20.2	21.0	10.2	11.5	11.9	9.5	8.7	9.1
Morocco	7.3	6.7	6.9	1.3	1.3	1.3	6.0	5.4	5.5
Jordan	3.4	4.1	4.1	1.2	1.1	1.1	2.3	2.9	3.0
Egypt	8.7	9.9	6.0	2.2	2.6	3.0	6.5	7.3	3.0
S. Arabia	8.5	7.4	7.7	17.3	17.0	17.7	-8.8	-9.6	-10
UAE	9.2	10.4	-	13.2	15.1	-	-4.0	-4.7	-
Indonesia	8.0	8.3	9.3	6.3	6.8	7.3	1.7	1.5	2.0
Qatar	1.2	2.9	3.5	1.8	5.6	6.6	-0.6	-2,7	-3.1
Lebanon	6.5	6.0	-	4.0	3.9	-	2.5	2.1	-
Iran	2.4	1.2	-	9.8	6.6	-	-7.4	-5.4	-

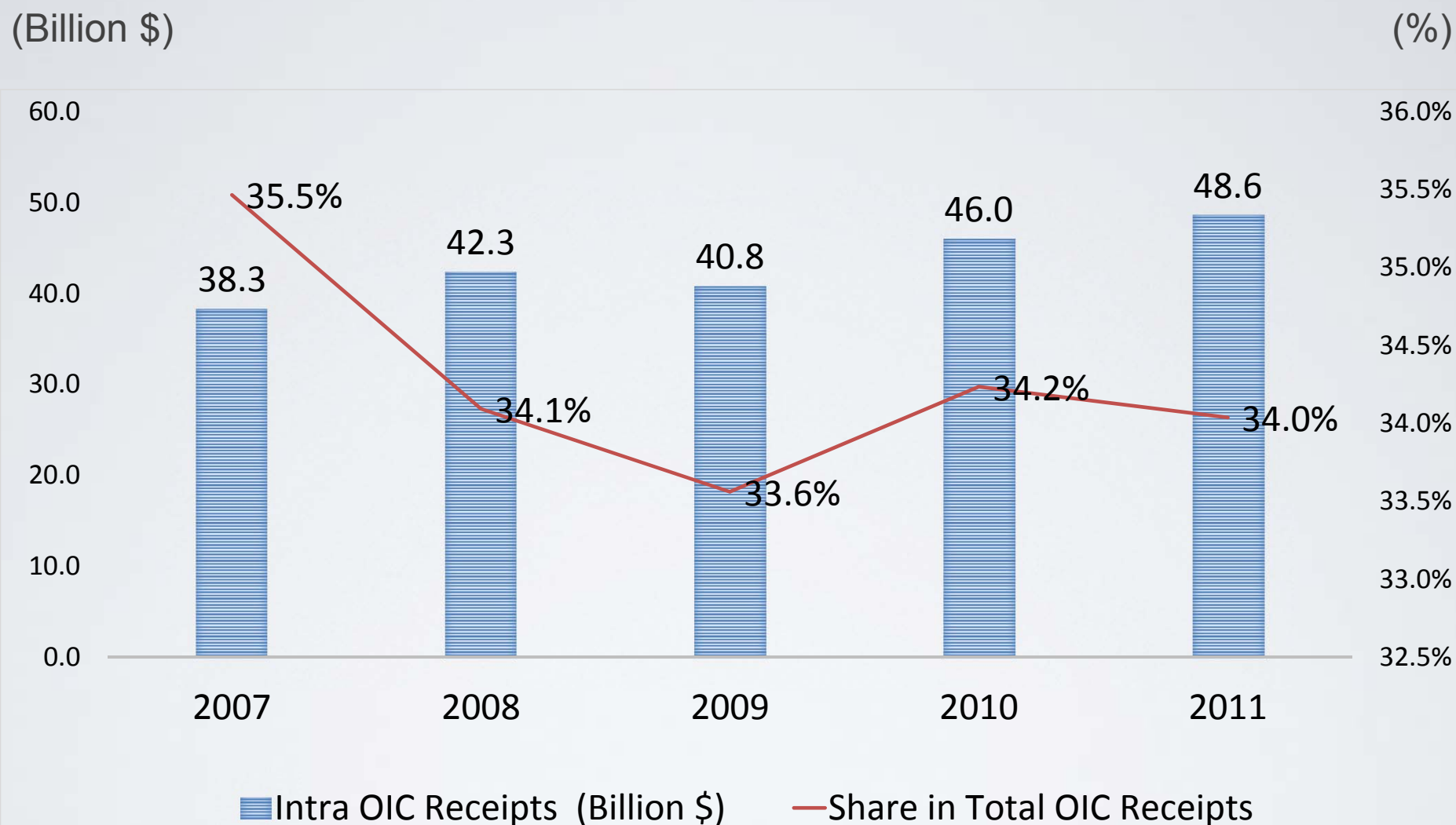
☐ Turkey ranks as 5th, Malaysia as 11th, Morocco as 16th, Jordan as 22th and Egypt as 23th country in international tourism market in 2013.

Intra-OIC Tourist Arrivals 2007-2012



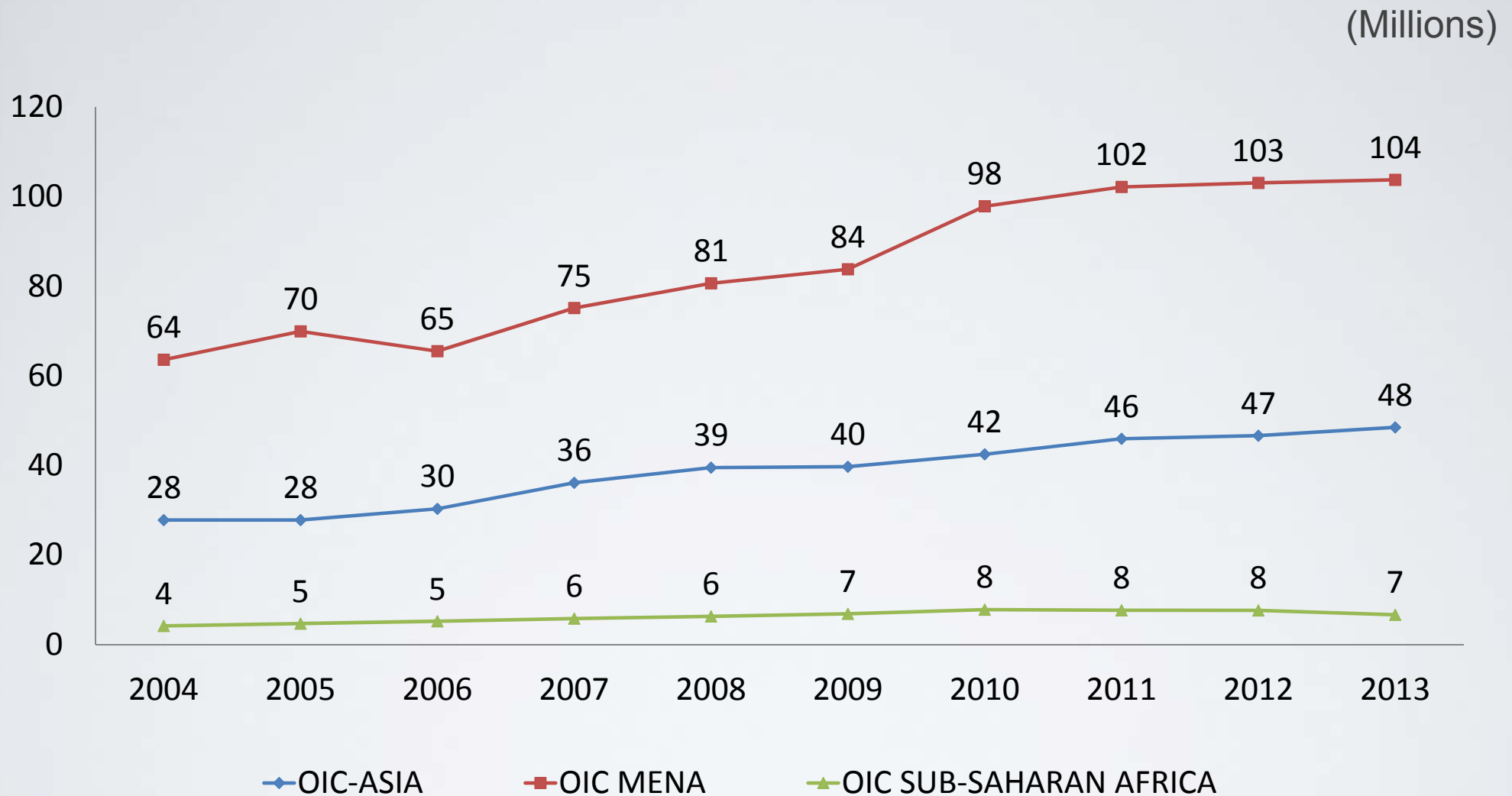
Source: SESRIC, 2014

Intra-OIC Tourism Receipts 2007-2011



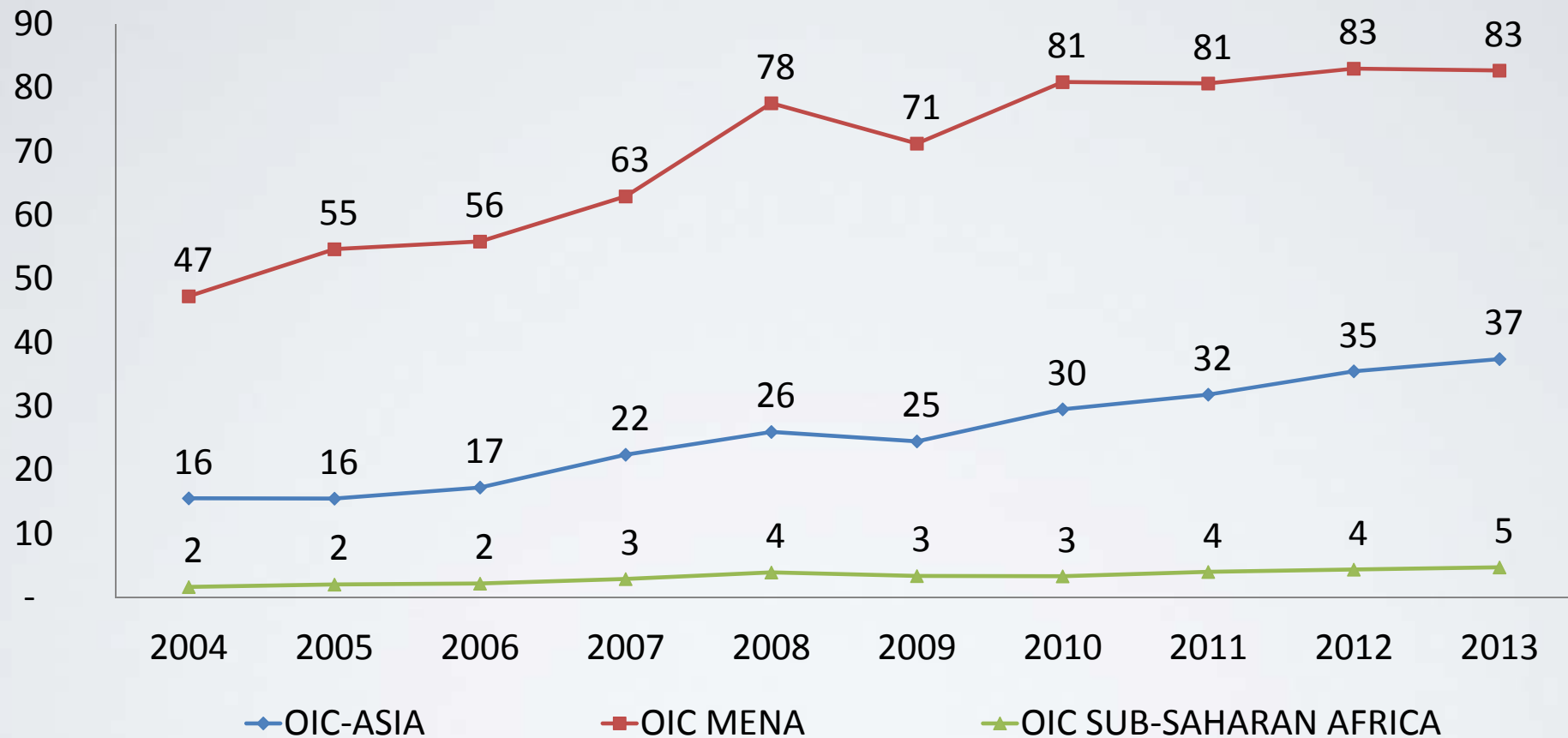
Source: SESRIC, 2014

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



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

(Billion \$)



Recent Developments in the OIC Member Countries

- ▶ **Turkey** realized 5% more arrivals in the first five months of 2014.
- ▶ **Indonesia** and **Malaysia** posted 10% more arrivals in the first half of 2014.
 - ▶ The Visit Malaysia Year 2014
- ▶ **Jordan** reported 3% increase for the first months of 2014.

Source: UNWTO

Recent Developments in the OIC Member Countries

- ▶ **Morocco** recorded 9% increase in tourist arrivals for the first half of 2014.
- ▶ **Tunisia**- An improved image and a recovery of confidence.
 - ▶ The reputation of tourism products
 - ▶ The improvement in security standards
- ▶ **Oman (+28%)** and **Palestine (+26%)** reported solid growth.

Source: UNWTO

Recent Developments in the OIC Member Countries

- ▶ **Egypt (-26%)** - a significant drop was realized.
- ▶ **Lebanon (-9%)** continue to report decreases in arrivals for the year 2014.

Source: UNWTO

Tourism Opportunities and Challenges for the OIC Member Countries

Opportunities



- Natural Resources
- Cultural Resources
- Human Resources
- Authenticity and newness
- Price competitiveness
- Dynamism

Challenges



- Insufficient Tourism Investments and Infrastructures
- Poor Tourism Planning & Product Development
- Travel Facilitation Problems
- Safety and Security Related Problems
- Low Tourism Service Quality
- Insufficient Marketing and Promotion
- Insufficient Image Building and Branding

Challenges and Drivers for Increasing the Quality of Tourism Workforce

Challenges



- Lack of political and financial support of public authorities for education and training
- Limited supply of education and training programmes
- Lack of competencies and attitude of employers
- Incompatible attitude of employees
- Pressure of competition from other countries and sectors

Drivers



- Ageing population
- Changing lifestyles and consumer demands
- Increased use of ICT and the Internet
- Globalisation and economic growth

Source: adopted from OECD, 2012

