



Making Cooperation Work

COMCEC STRATEGY

For Building an Interdependent Islamic World

COMCEC TOURISM OUTLOOK 2014



COMCEC

Aslı TAŞMAZ DADAKOĞLU
COMCEC Coordination Office
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OUTLINE

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

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)



**1/11
JOBS**



**US \$ 1.3
TRILLION
IN
EXPORTS**



**6%
OF
WORLD'S
EXPORT**



**6%
EXPORTS OF
LEAST
DEVELOPED
COUNTRIES**

Source: UNWTO Tourism Highlights, 2013 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

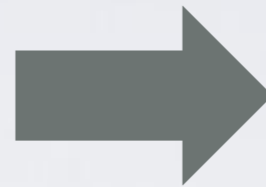


Source: UNWTO Tourism Highlights, 2013 Edition

Key Tourism Trends in the World

- ▶ New destinations will gain importance.

3S



3E

Sun-Sand-Sea

Excitement-
Education-
Entertainment

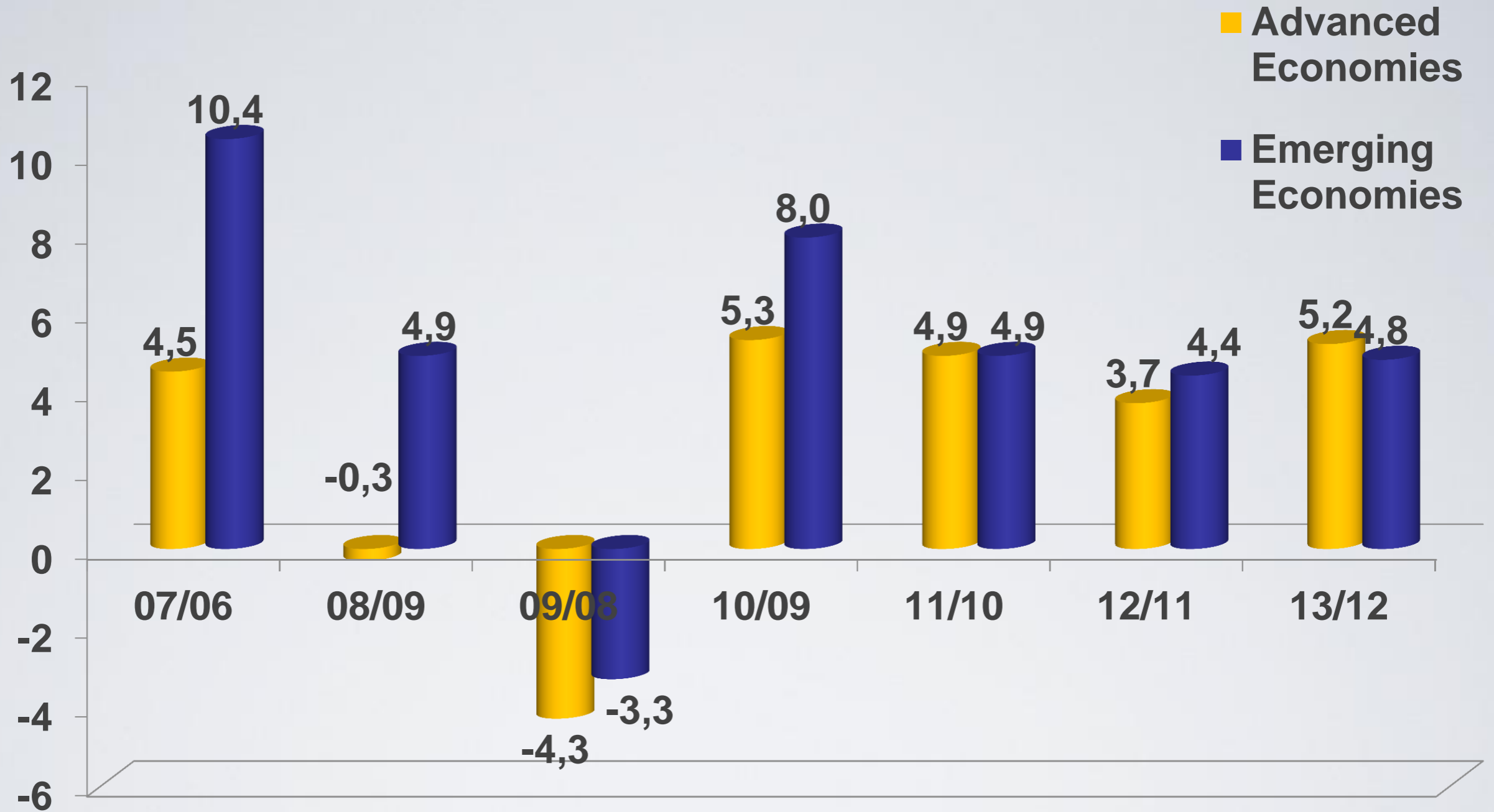
International Tourist Arrivals



* Forecast

Source: World Tourism Organization

International Tourist Arrivals (%)



Source: UNWTO, 2014

International Tourist Arrivals

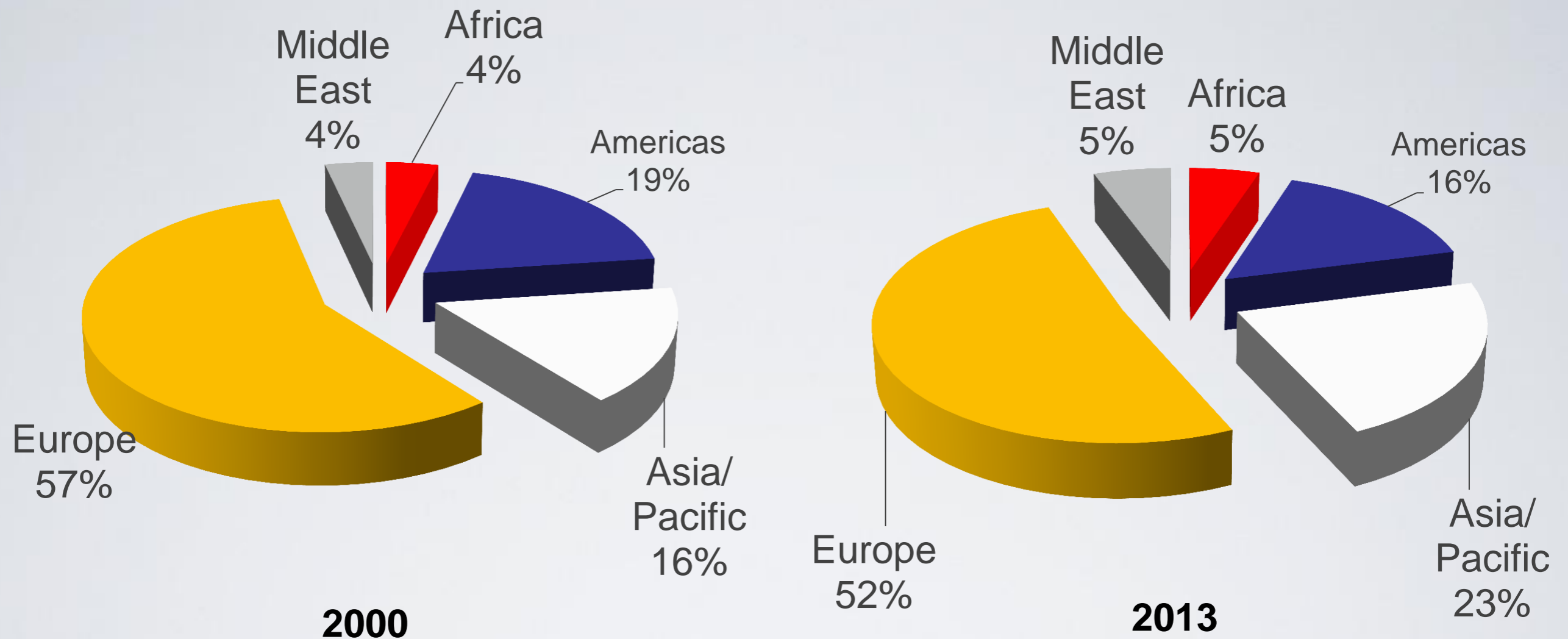
(Millions)

Tourist Arrivals	2000	2011	2012	2013
World	677	996	1.035	1.087
Europe	388.0	516.1	533.9	562.8
Asia and Pacific	110.1	218.6	233.6	247.7
Americas	128.2	156.0	163.0	168.8
Africa	26.2	49.7	53.1	56.1
Middle East	24.1	54.7	51.8	51.9

Source: UNWTO

International Tourism- Market Share

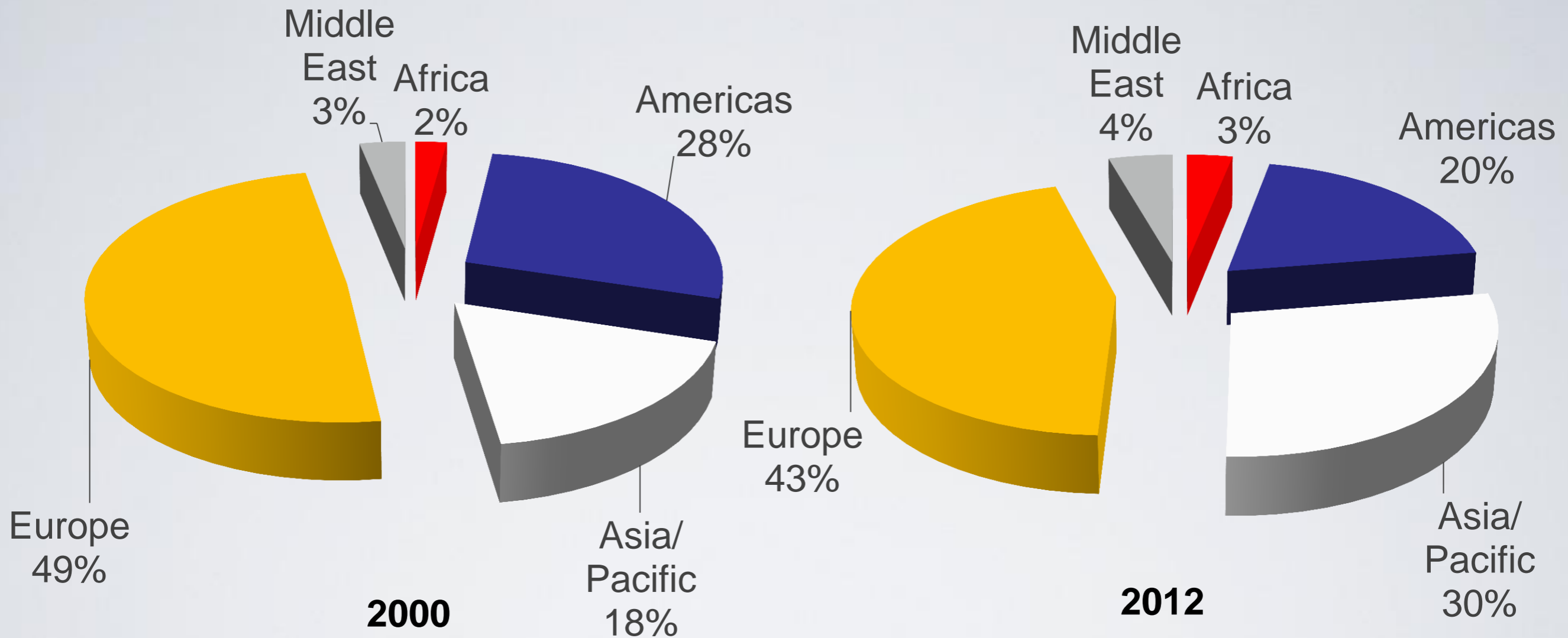
Tourist Arrivals



Source: UNWTO

International Tourism- Market Share

Tourism Receipts



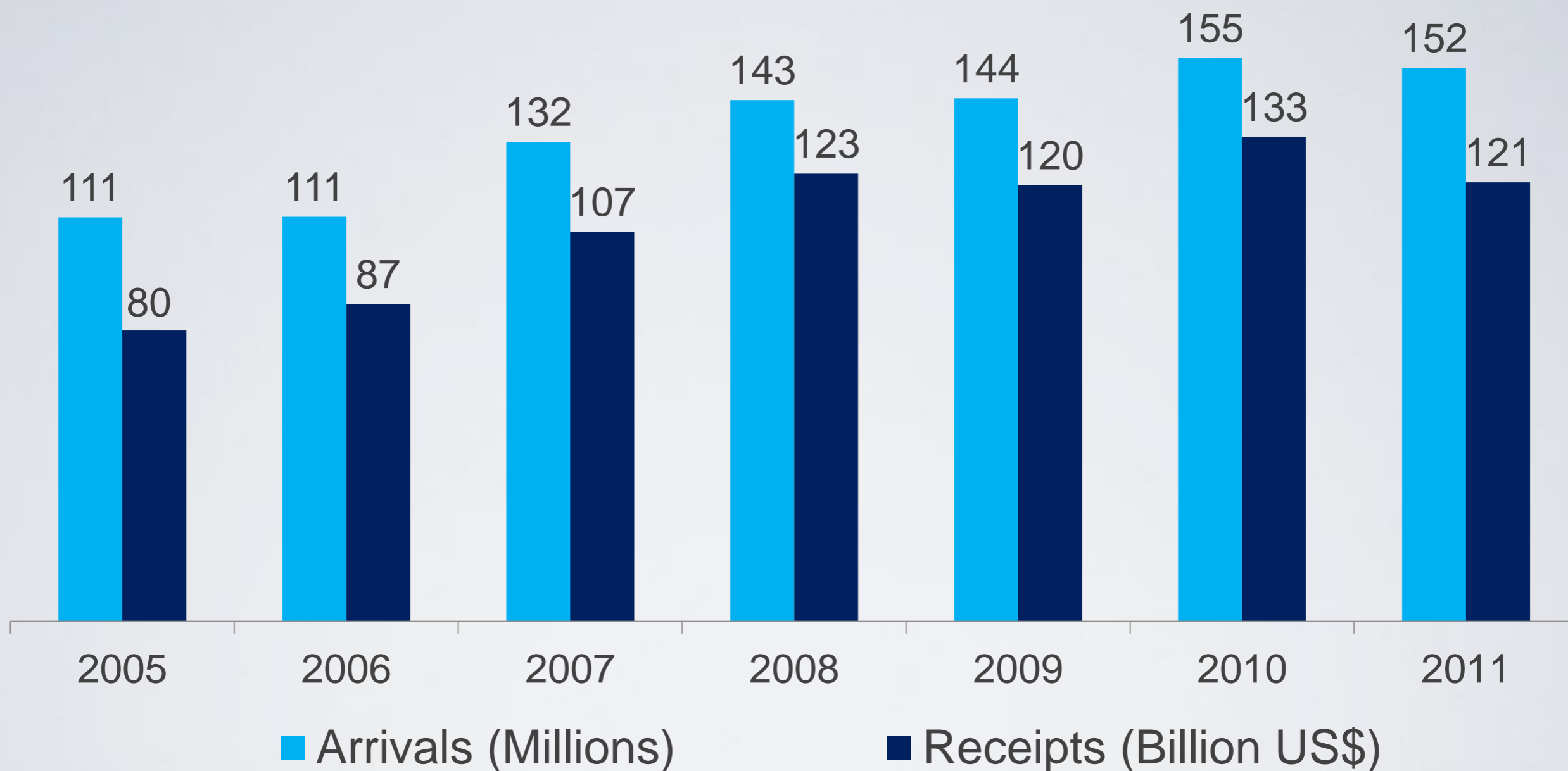
Source: UNWTO, Tourism Highlights 2013 Edition

International Tourism Receipts (US \$ Billion)

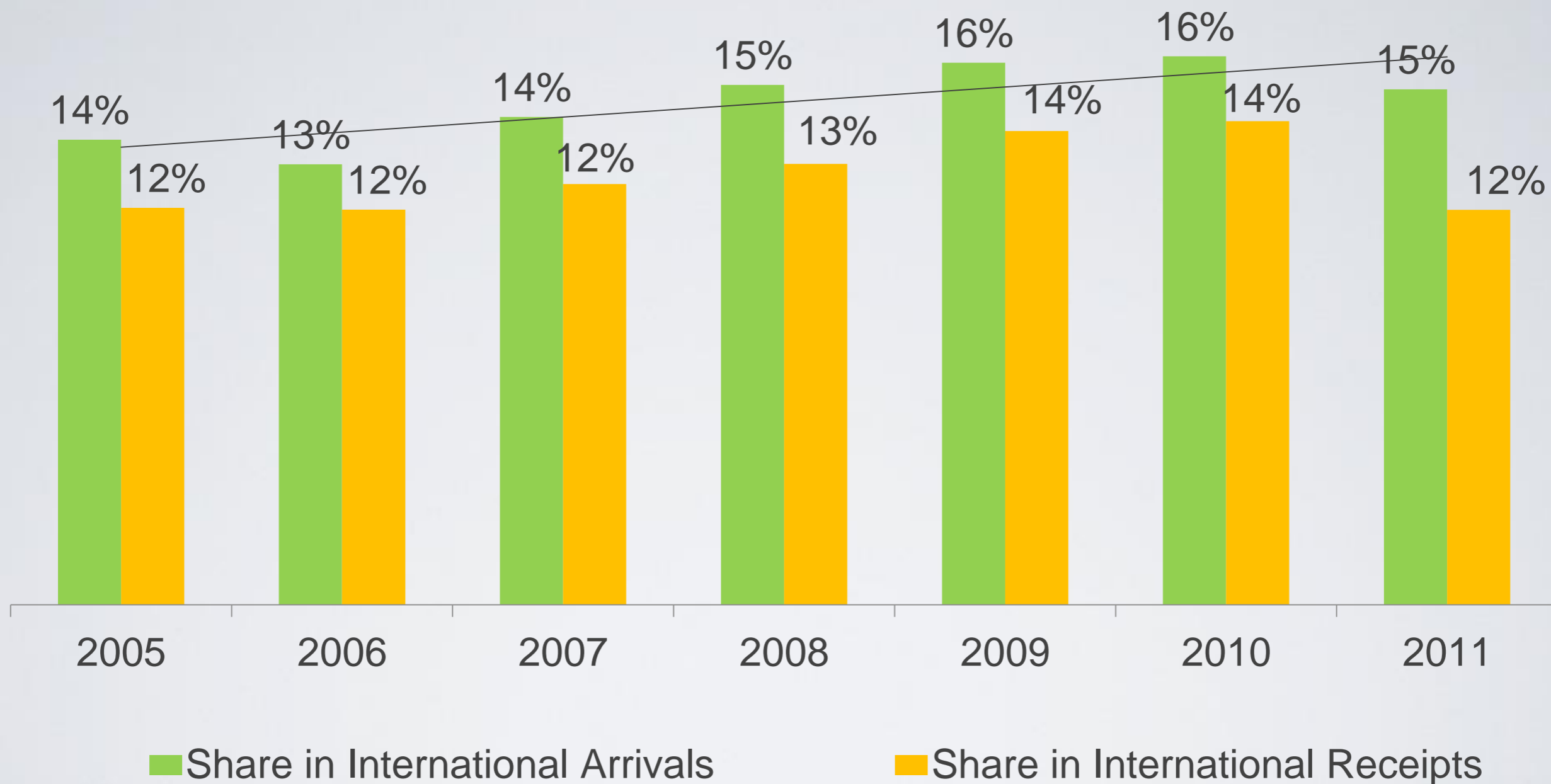
Tourism Receipts	2000	2011	2012
World	475	1.030	1.075
Europe	234,5	463,4	457,8
Asia and Pacific	86,7	289,4	323,9
Americas	132,8	199,1	212,6
Africa	10,8	32,6	33,6
Middle East	12,7	45,9	47

Source: World Tourism Organization, Tourism Highlights, 2002&2013 Edition

International Tourism in the COMCEC Countries

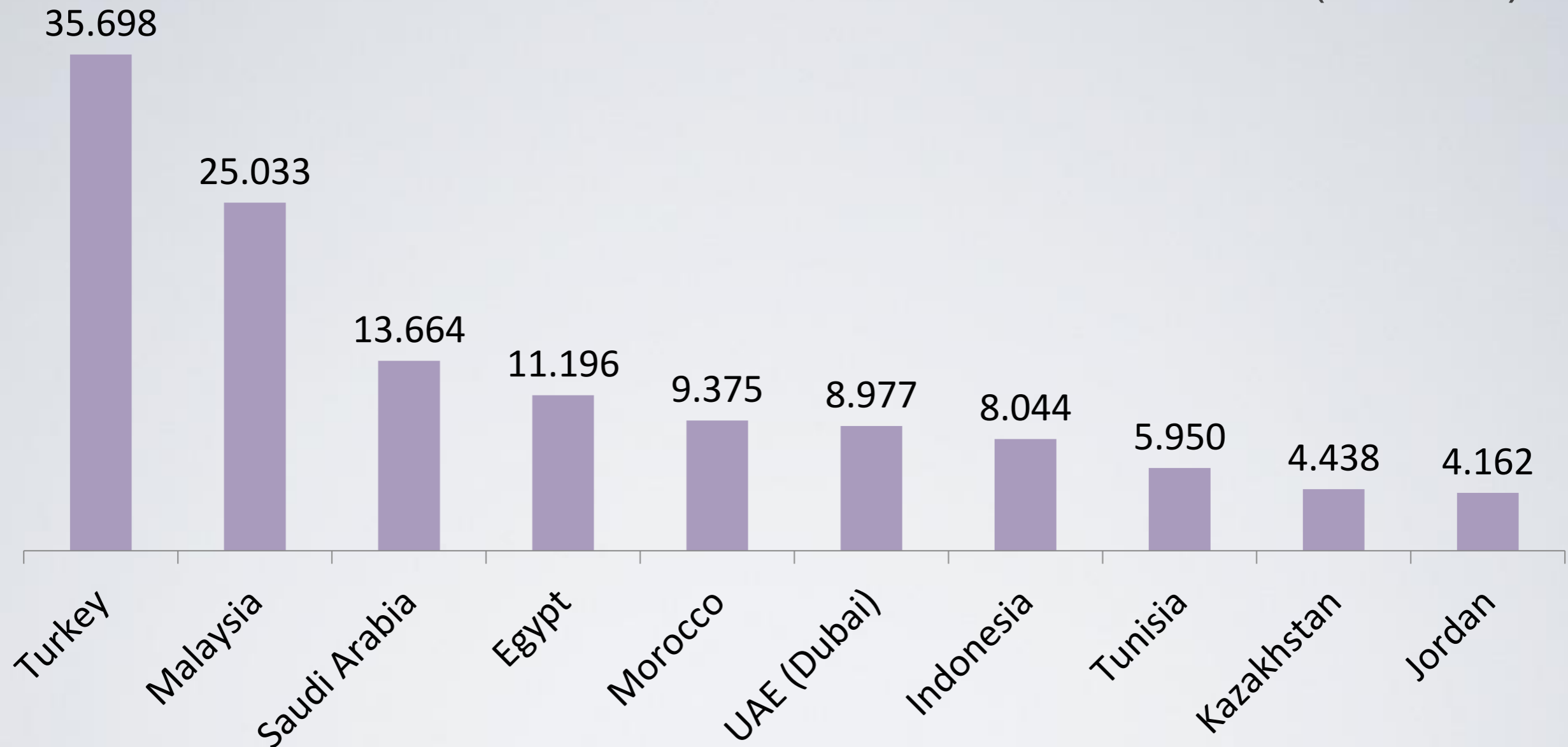


International Tourism in the COMCEC Countries



Top 10 COMCEC Tourism Destinations in International Tourist Arrivals (2012)

(Millions)



□ Top-10 countries hosted **126,5 million international tourist** in 2012.

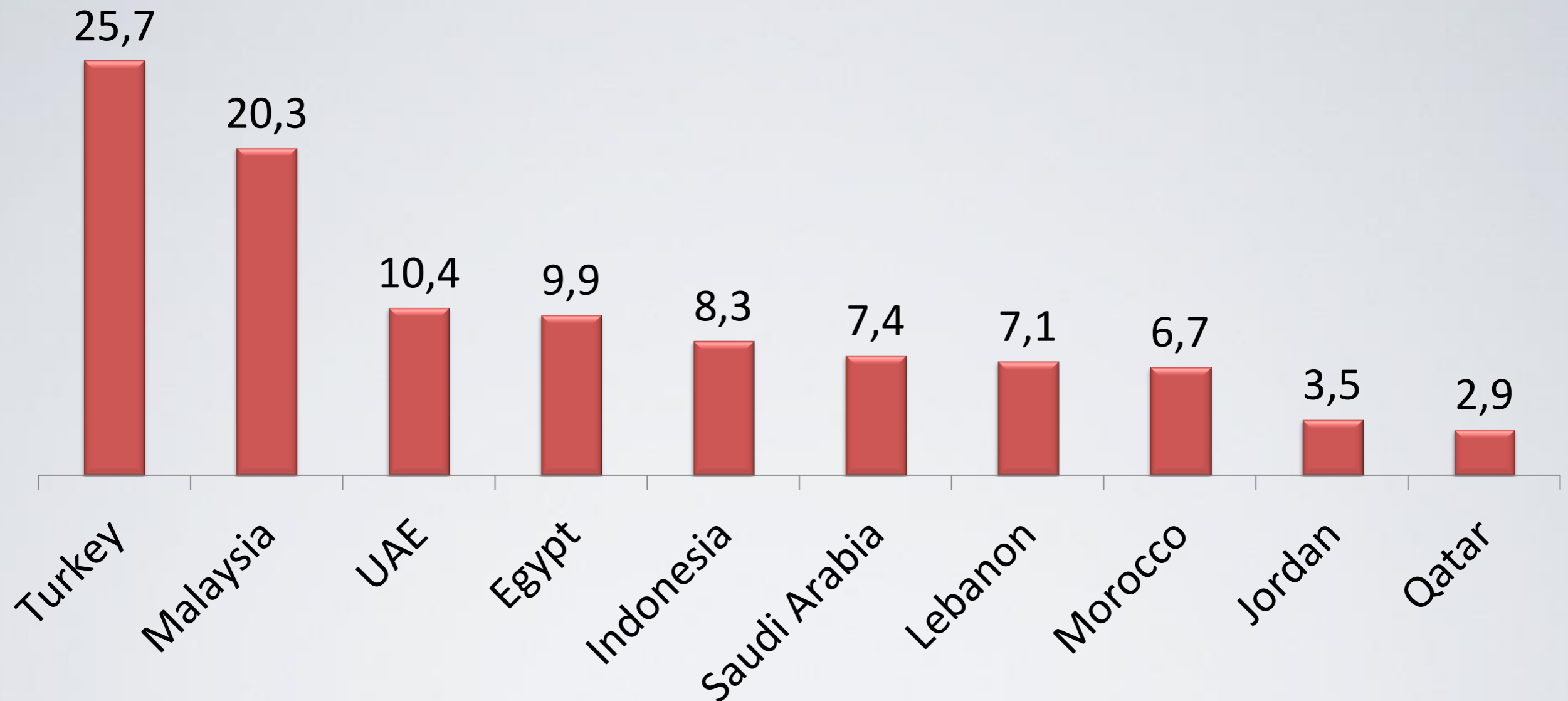
Top 10 Tourism Destinations in International Tourist Arrivals (2012)

2012		(Millions)
1 France	83.0	
2 United States	67.0	
3 China	57.7	
4 Spain	57.7	
5 Italy	46.4	
6 TURKEY	35.7	
7 Germany	30.4	
8 United Kingdom	29.3	
9 Russian Federation	25.7	
10 MALAYSIA	25.0	

Source: UNWTO, Tourism Highlights 2013

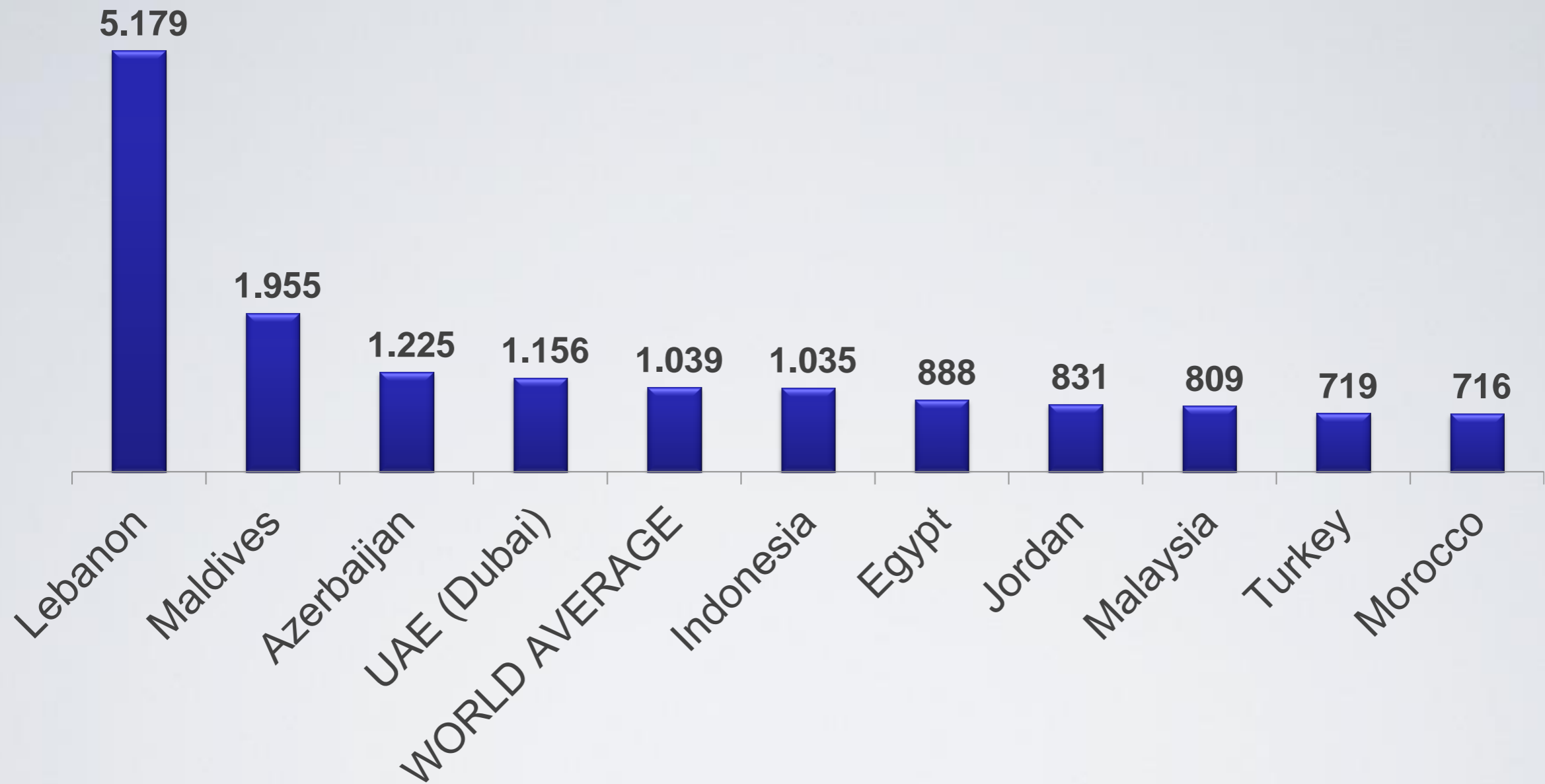
Top 10 COMCEC Tourism Earners in International Tourist Arrivals (2012)

(Billion \$)



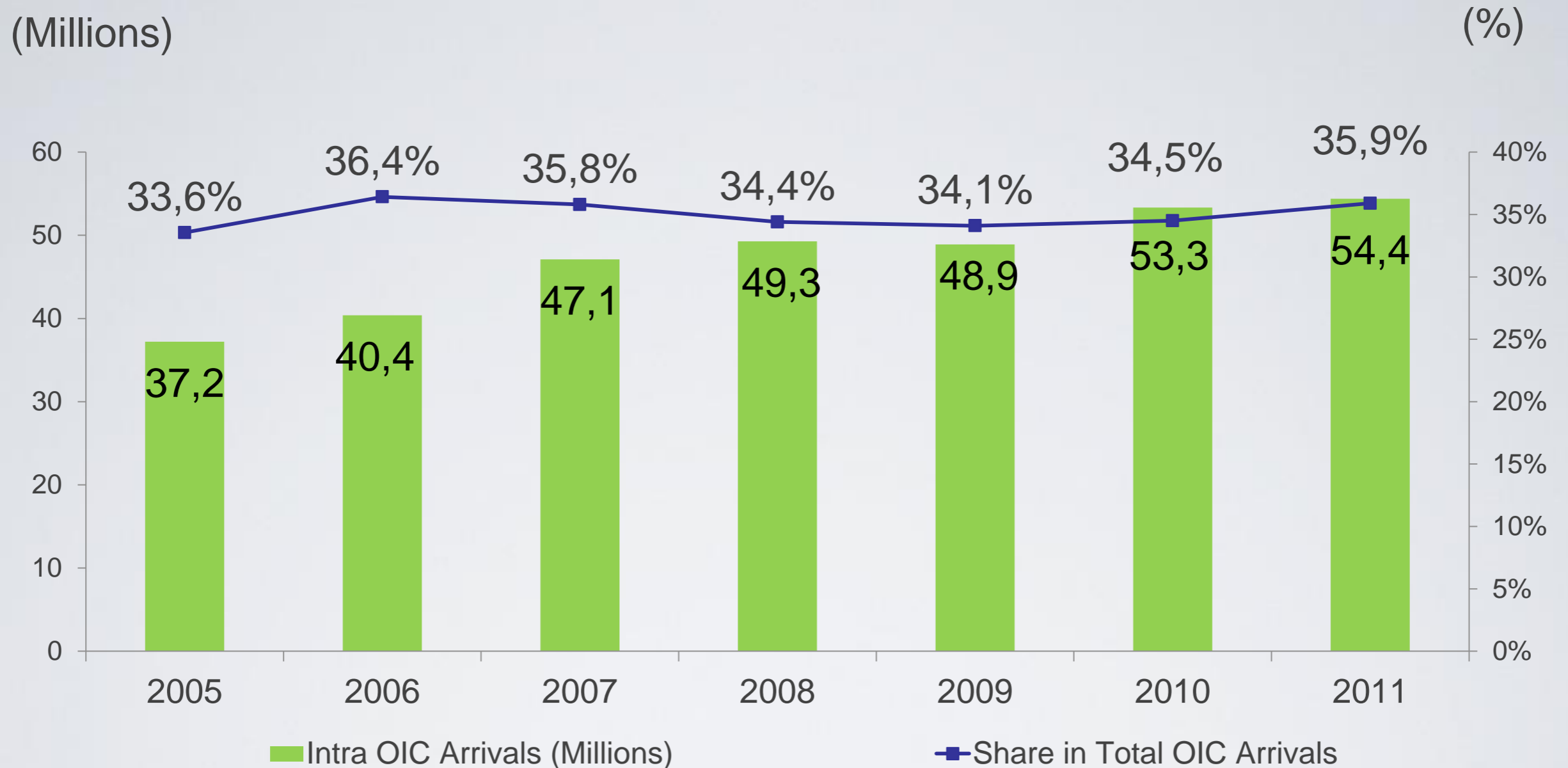
□ Top-10 countries earned **US\$ 102.1 billion** as international tourism receipts in 2012.

International Tourism Receipts per Arrival in the COMCEC Countries in 2012 (US\$)



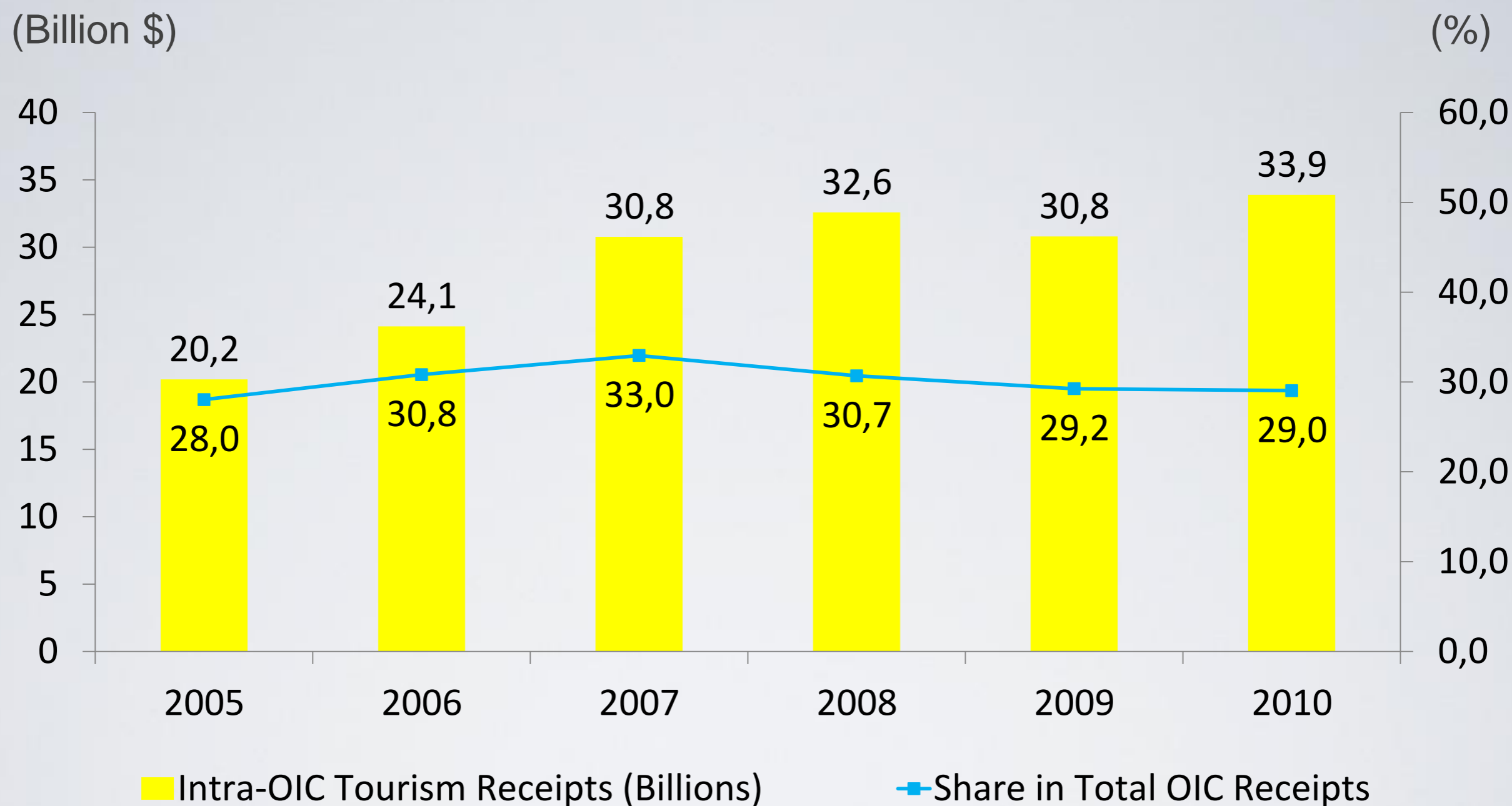
☐ Lebanon is the first country with US \$ 5.179 tourism receipt per visitor.

Intra-OIC Tourist Arrivals 2005-2011



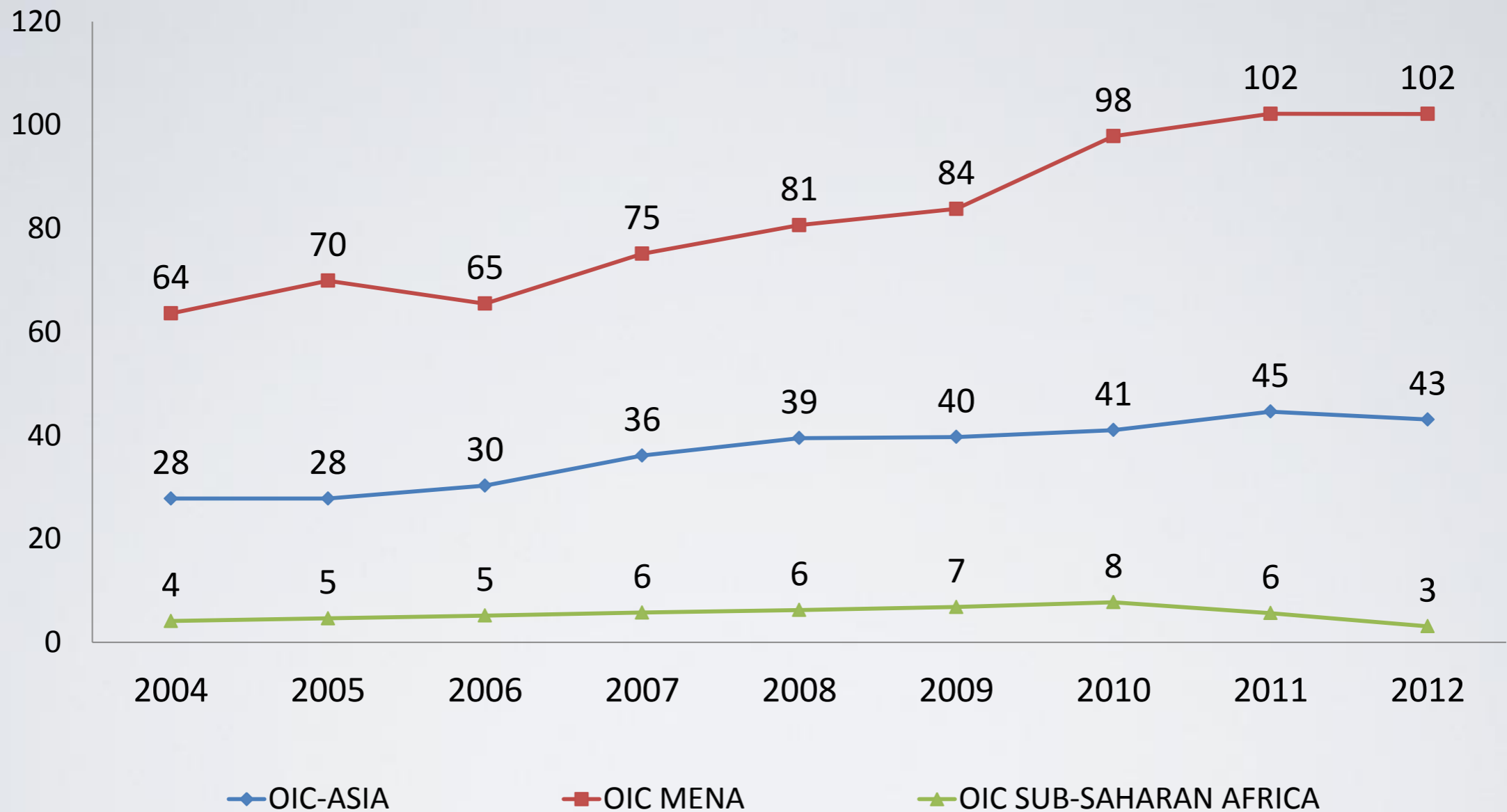
Source: SESRIC, 2013

Intra-OIC Tourism Receipts



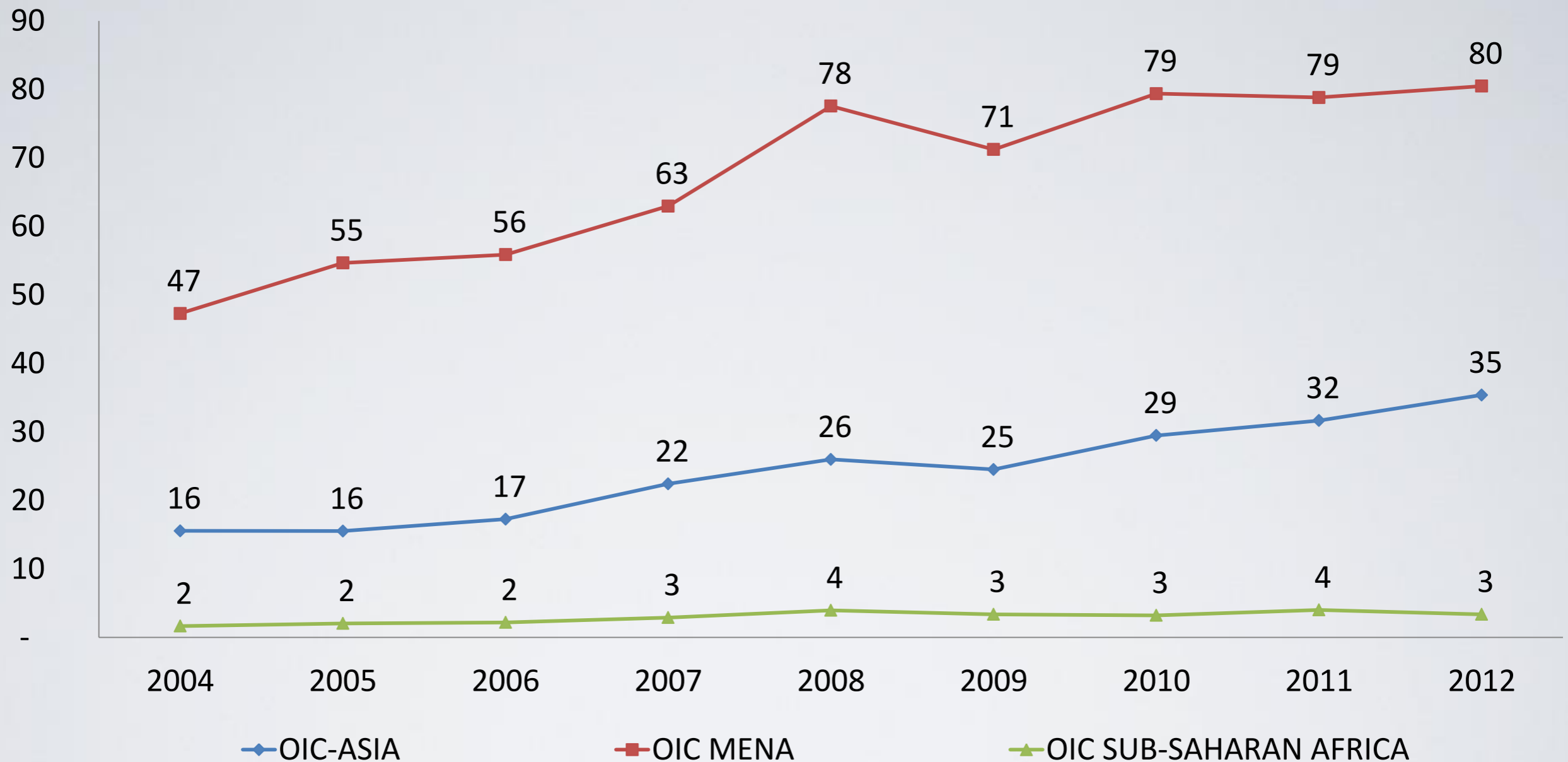
Tourist Arrivals in OIC Regions (OIC-MENA, OIC-Asia, and OIC-Sub-Saharan Africa)

(Millions)



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

(Billion \$)



Recent Developments in the COMCEC Region

- ▶ **Turkey** hosted 35.7 million tourists in 2013.
 - ▶ The turmoil in North Africa and the Middle East
- ▶ **Malaysia** realized 3% more arrivals through September 2013.
 - ▶ The Visit Malaysia Year 2014

Source: UNWTO

Recent Developments in the COMCEC Region

- ▶ **Morocco** recorded 7% increase in tourist arrivals.
- ▶ **Tunisia-** An improved image and a recovery of confidence.
 - ▶ The reputation of tourism products
 - ▶ The improvement in security standards

Source: UNWTO

Recent Developments in the COMCEC Region

- ▶ **Brunei Darussalam** (15%) and **Maldives** (18%)
- ▶ **The United Arab Emirate (UAE) of Dubai** (10%)
 - ▶ the Formula One Championship in Abu Dhabi
- ▶ **Dubai** (10.4%)
 - ▶ investments such as the new air terminal near Jebel Ali.
- ▶ **Oman** (+6%) and **Palestine** (+4%) reported growth.

Source: UNWTO

Recent Developments in the COMCEC Region

- ▶ **Egypt (-18%)** - a significant drop was realized.
- ▶ **Saudi Arabia (-7%)** reported a decline in 2013
 - ▶ On-going construction works in Mecca
 - ▶ The Middle East respiratory syndrome coronavirus (MERS)
- ▶ Countries such as **Lebanon (-7%)** and **Jordan (-6%)** suffered from the conflict in neighboring Syria.

Source: UNWTO

The Travel & Tourism (T&T) Competitiveness Index 2013

- ▶ published by World Economic Forum (WEF)
- ▶ covers 140 economies,
- ▶ uses three sub-indexes
 - ▶ T&T regulatory framework;
 - ▶ T&T business environment and infrastructure;
 - ▶ T&T human, cultural, and natural resources.

The T&T Competitiveness Index 2013 Results for Top-5 COMCEC Members

Economy	Rank	Score	Change since 2011
United Arab Emirates	28	4,86	2
Malaysia	34	4,70	1
Qatar	41	4,49	1
Turkey	46	4,44	4
Bahrain	55	4,30	-15

Source: WEF, 2013

□ United Arab Emirates has the highest rank with 28th score of 4,86 over 5.

The T&T Competitiveness Index 2013 Results for Top-5 COMCEC Members

Economy	T&T Regulatory Framework	T&T Business Environment and Infrastructure	T&T Human, Cultural, and Natural Resources
United Arab Emirates	45	9	35
Malaysia	55	41	17
Qatar	48	31	75
Turkey	64	52	27
Bahrain	77	32	83

Source: WEF, 2013

The T&T Competitiveness Index 2013 Results for COMCEC Members



Source: WEF, 2013

- There are only 4 COMCEC Member States in the first 50 countries.
- There are 19 COMCEC Member States in the first 100 countries.
- In the last 40, there are 21 COMCEC Member States.

Hospitality in the COMCEC Region

Country	City	2013*	2012	Change (%p)
Turkey	Istanbul	68.3	73.0	<u>-4.6</u>
Indonesia	Bali	65.9	69.7	-3.8
	Jakarta	68.7	70.7	-2.1
Malaysia	Kuala Lumpur	73.5	74.9	-1.4
Jordan	Amman	60.5	67.6	<u>-7.1</u>
Kuwait	Kuwait	53.2	52.7	0.5
Lebanon	Beirut	48.8	54.4	<u>-5.6</u>
Oman	Muscat	64.7	57.6	7.1
Qatar	Doha	64.4	56.9	7.5
Saudi Arabia	Riyadh	55.2	55.4	-0.2
UAE	Abu Dhabi	64.4	57.3	7.1
	Dubai	78.4	75.2	3.3
Egypt	Cairo	37.0	44.8	<u>-7.9</u>
	Sharm El-Sheikh	57.4	58.7	-1.3

Source: UNWTO, 2013

Tourism Opportunities and Challenges in the COMCEC Region

Opportunities



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

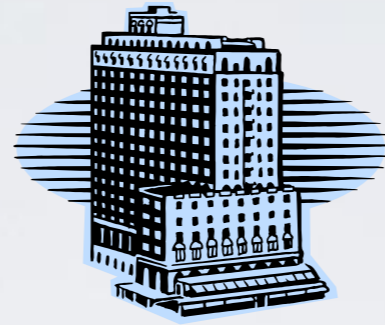
Challenges



- 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

Tourism Investments

Insufficient Tourism Investments and Infrastructures



Your Challenges
Your Solutions
Your Experiences



