



Making Cooperation Work

COMCEC STRATEGY

For Building an Interdependent Islamic World

COMCEC TOURISM OUTLOOK 2023



COMCEC

Gurel CETIN, PhD
Comcec Coordination Office
October, 2023

OUTLINE

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

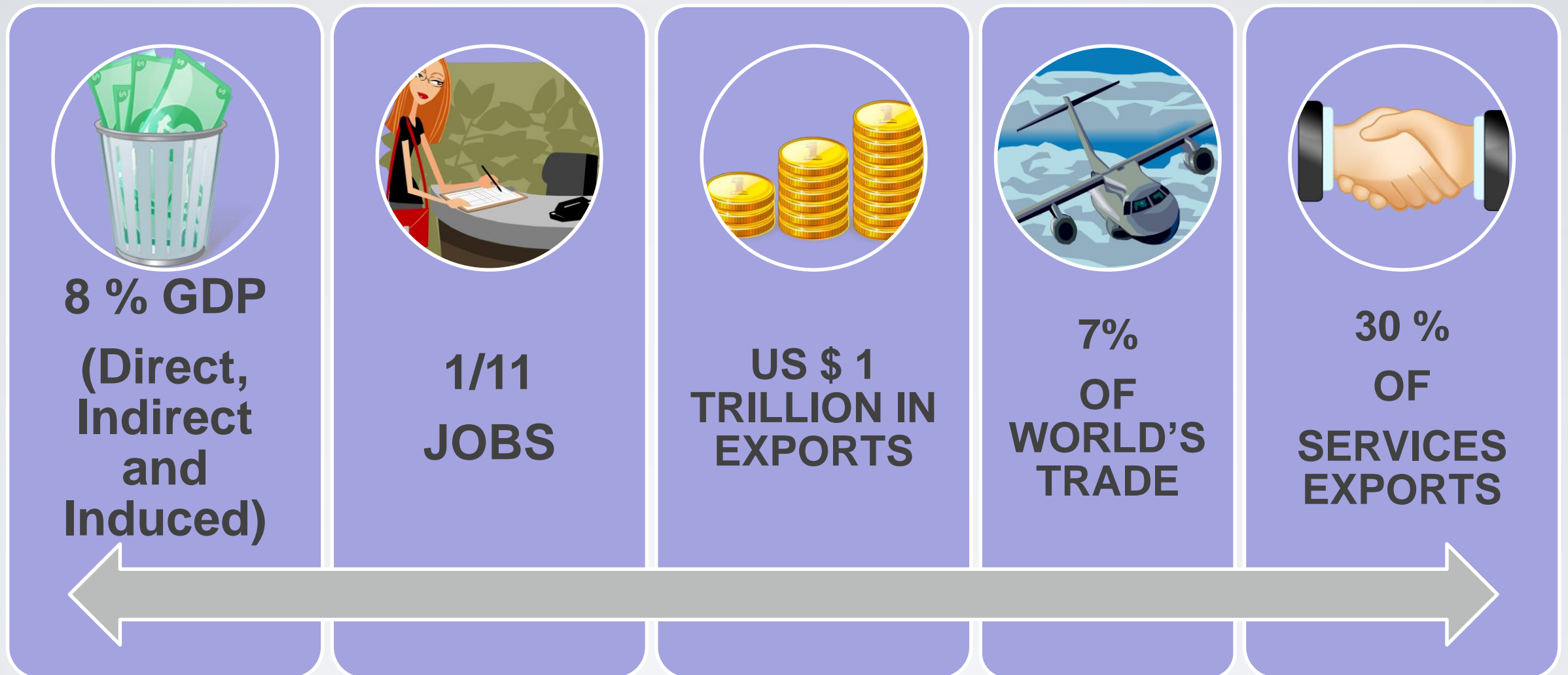
The Importance of Tourism for Development

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



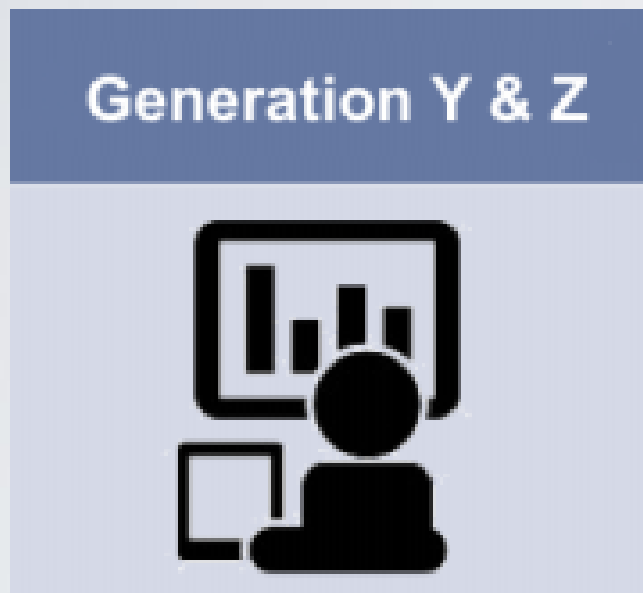
Middle Class Population
(in billion)



- 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 – 6-25 ages)

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

Source: Horwart HTL Tourism Megatrends, 2016

Behavioral Changes



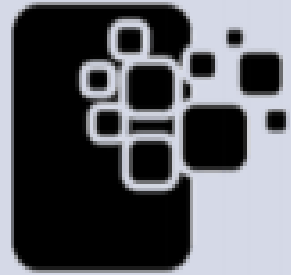
- Increase in the share of emerging economies
- 10 cities are from the Middle East and Asia in the top 20 global destinations by international overnight visitors.



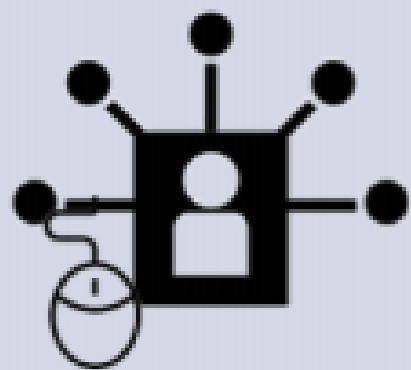
Source: Horwart HTL Tourism Megatrends, 2016

Advancements in Technology

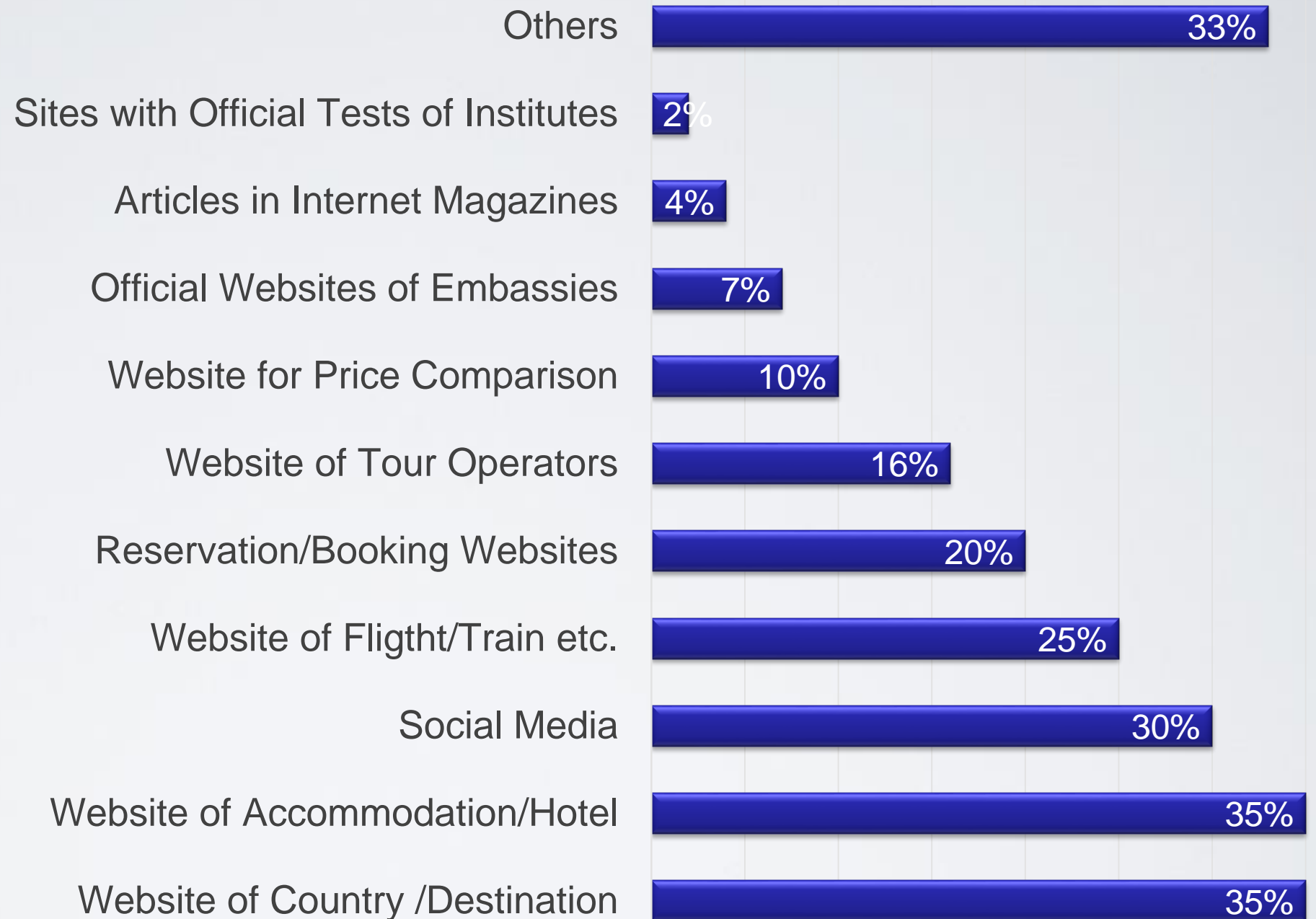
Technological (r)evolution



Digital channels



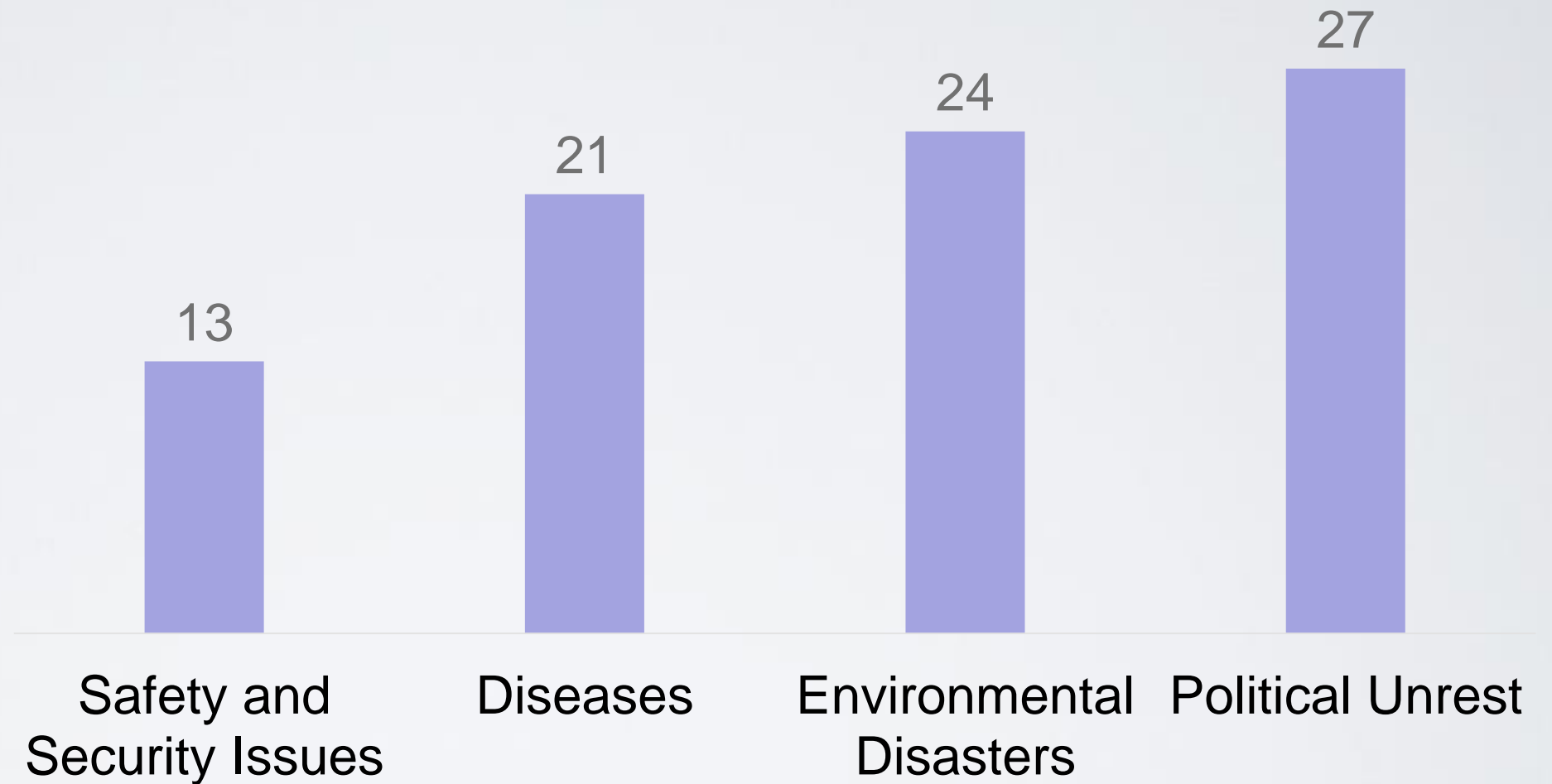
INTERNET INFORMATION SOURCES



Source: ITB World Travel Trends Report 2015-2016

Crises and Risk Management

Time to Recover from Crises for Tourism (months)



Source: WTTC, 2016

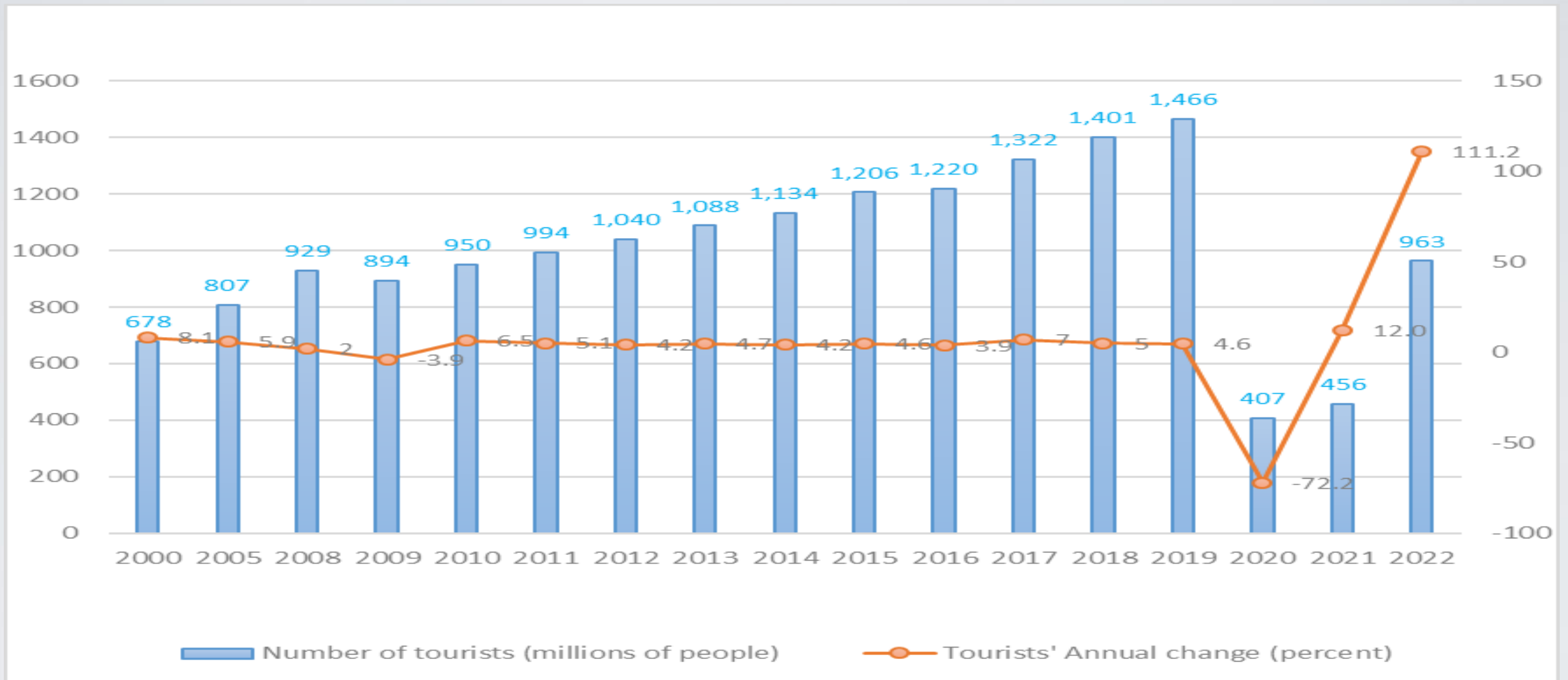
Sustainability



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

International Tourist Arrivals

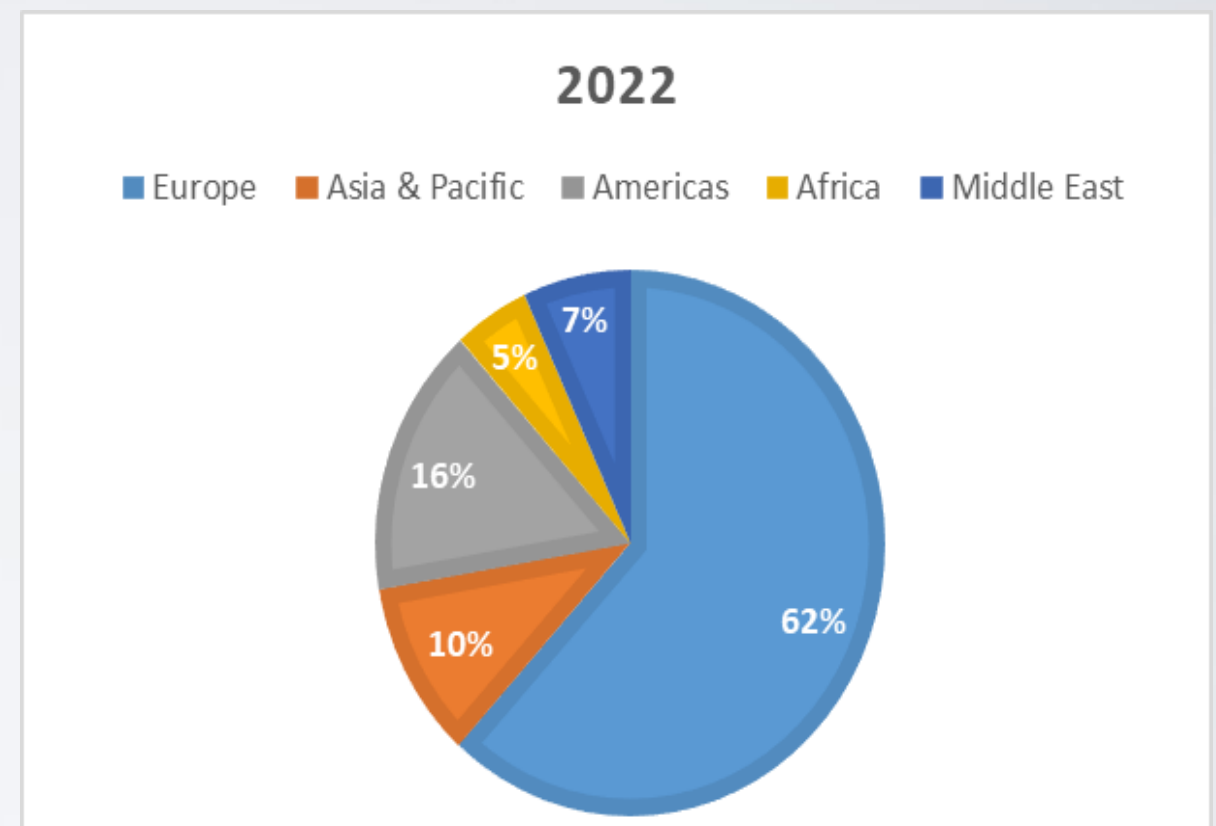
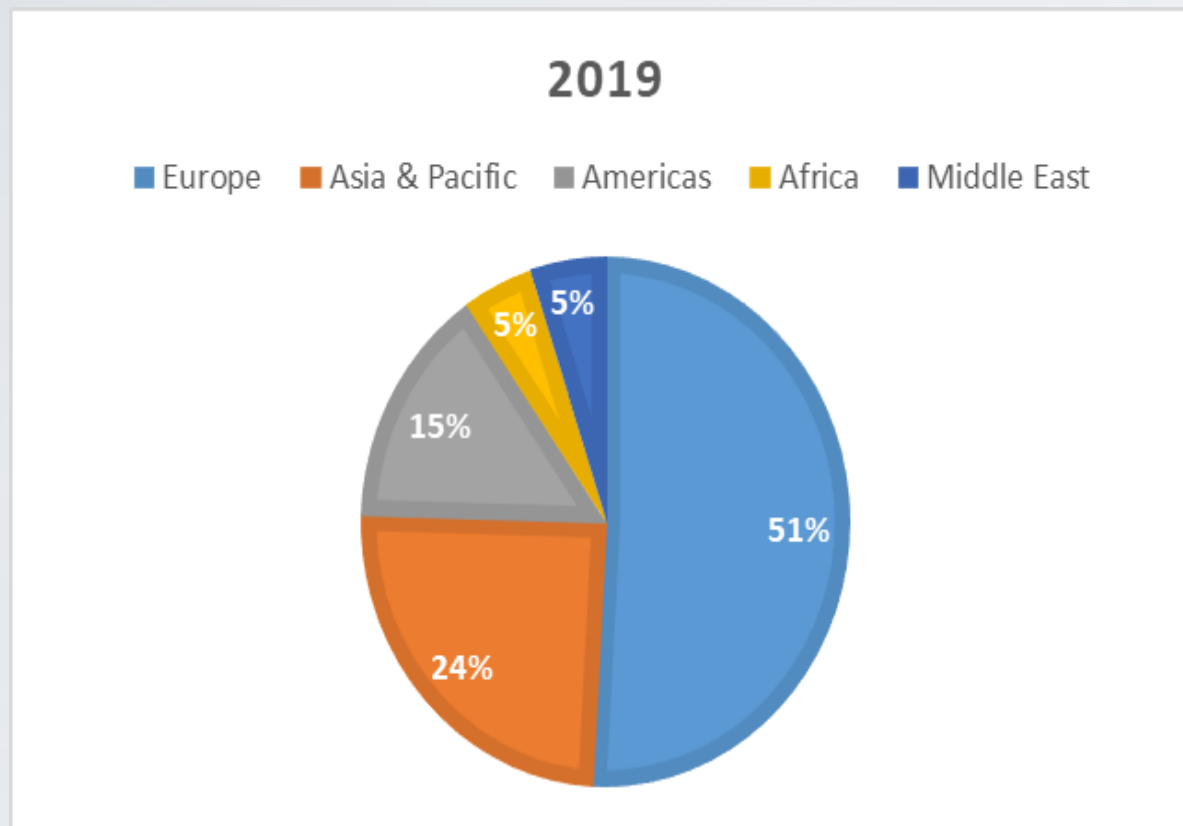
(Millions)



Source: World Tourism Organization

International Tourism- Market Share

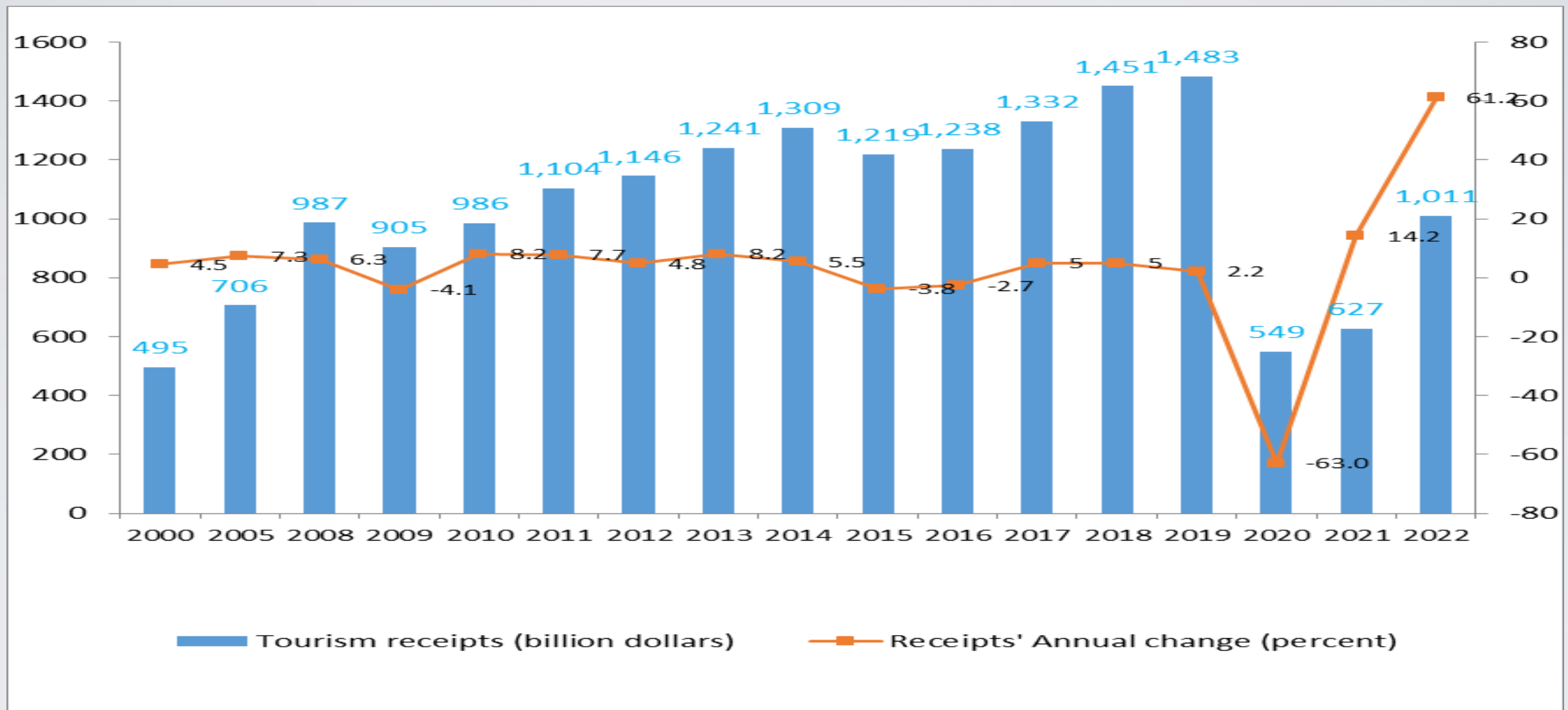
Tourist Arrivals



Source: UNWTO, 2023a

International Tourism Receipts

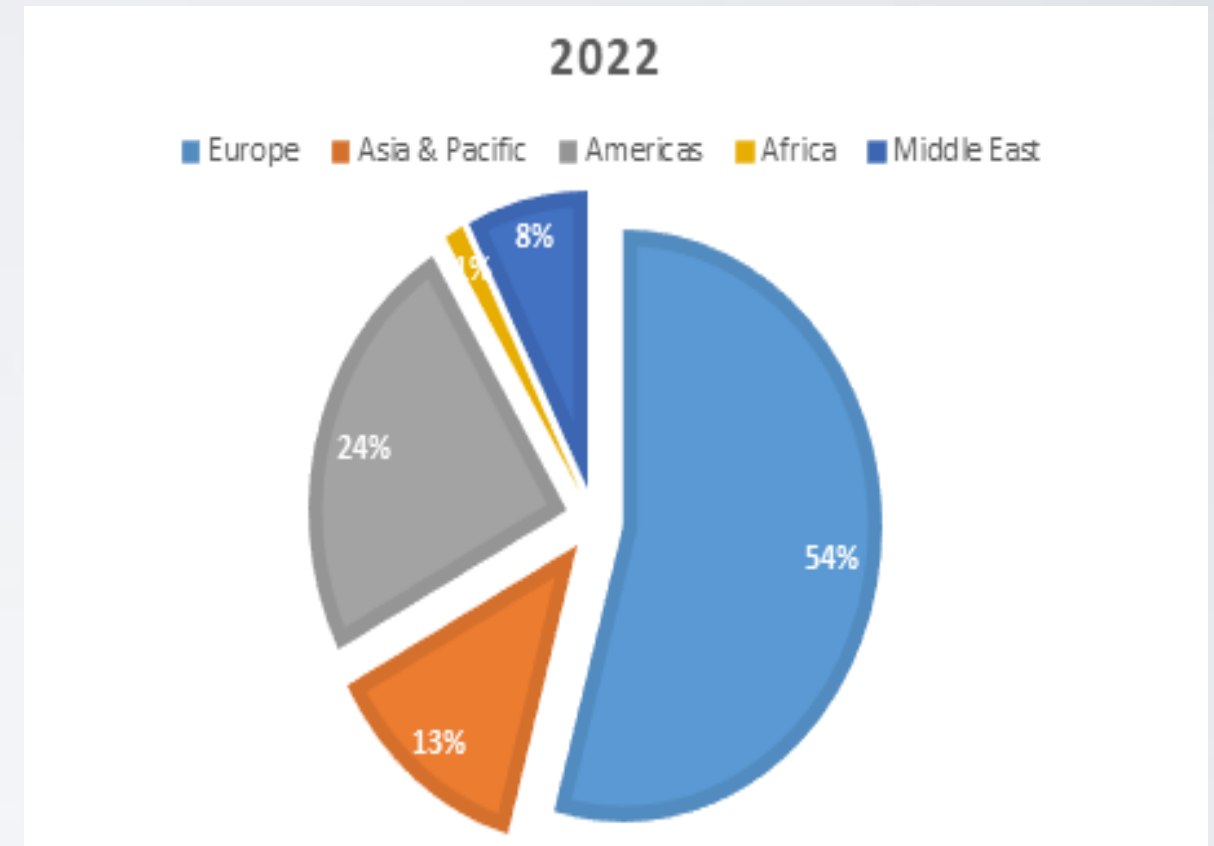
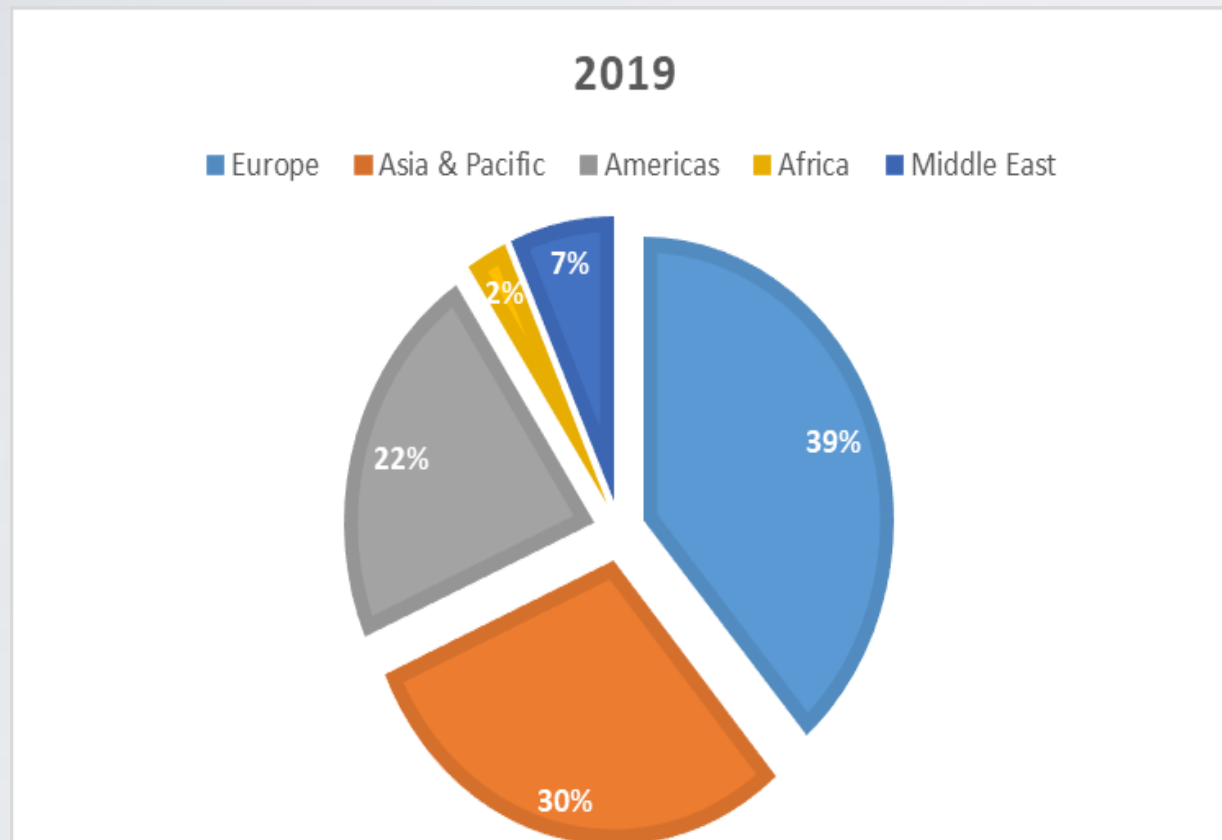
(Billion \$)



Source: World Tourism Organization

International Tourism Market Share

Tourism Receipts

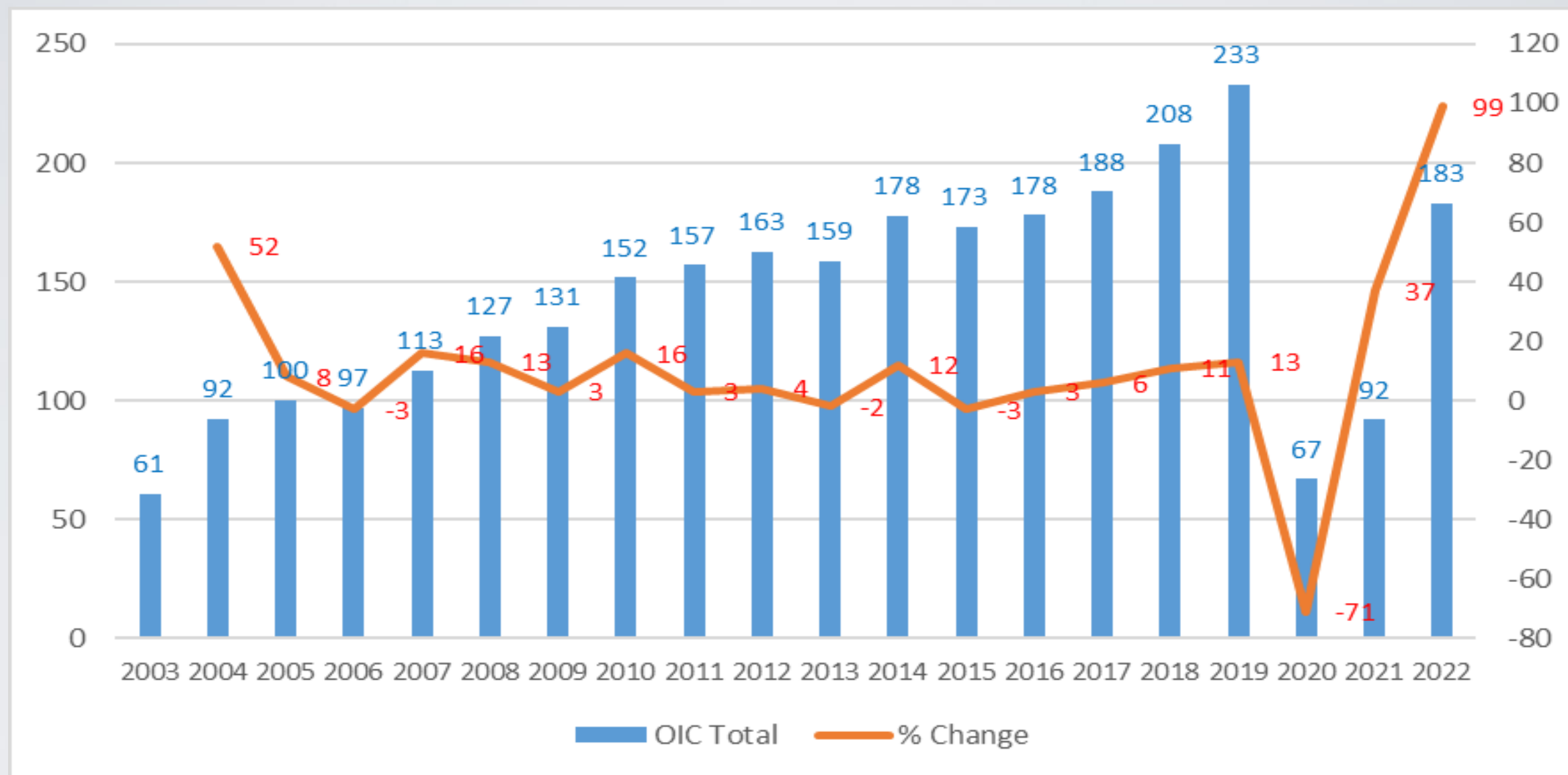


Source: UNWTO, 2023a

International Arrivals in the OIC Member Countries

(Millions)

(Billion \$)

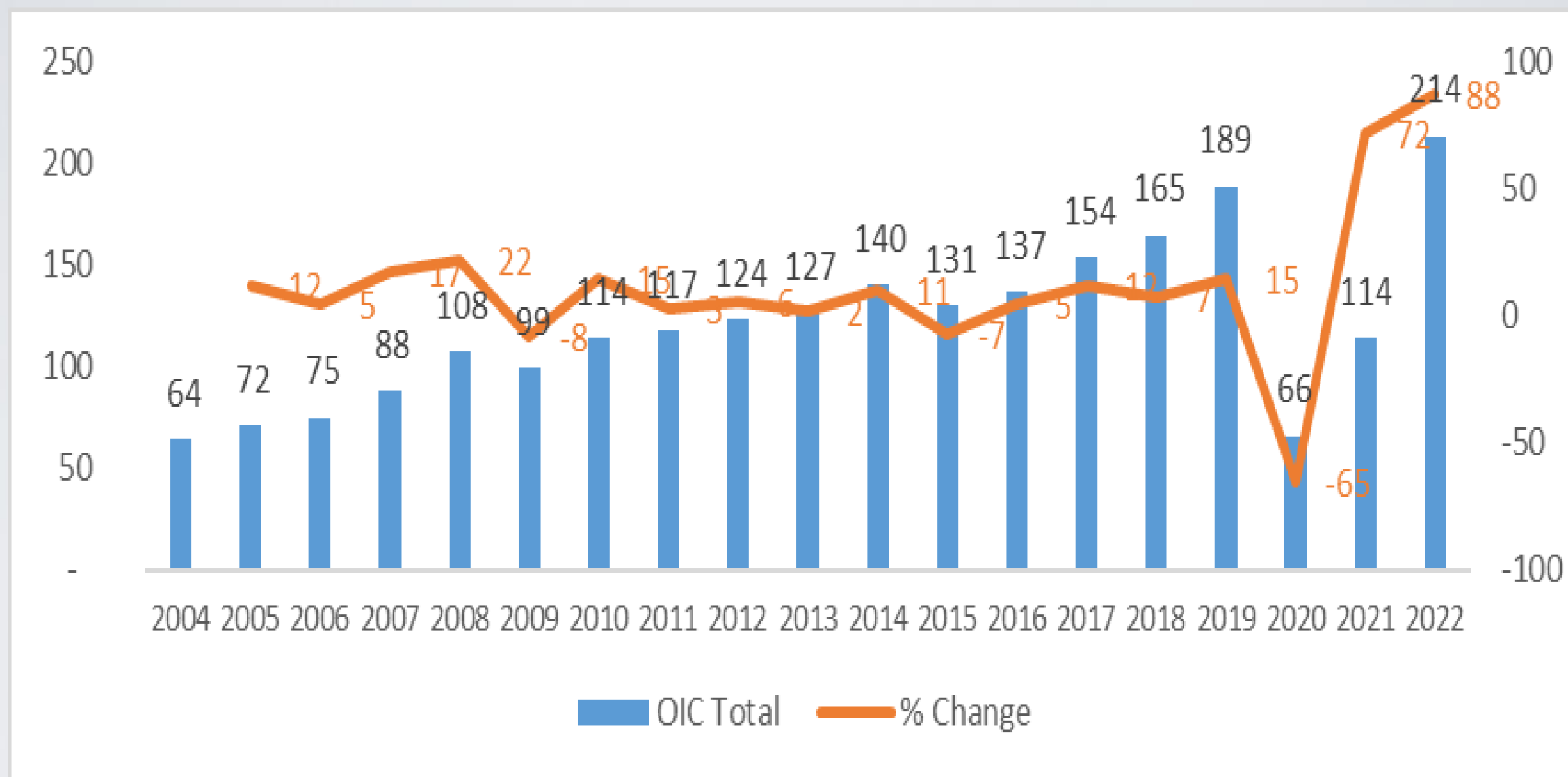


Source: Adopted from UNWTO, 2023c (Last available data for OIC countries were used)

International Receipts in the OIC Member Countries

(Millions)

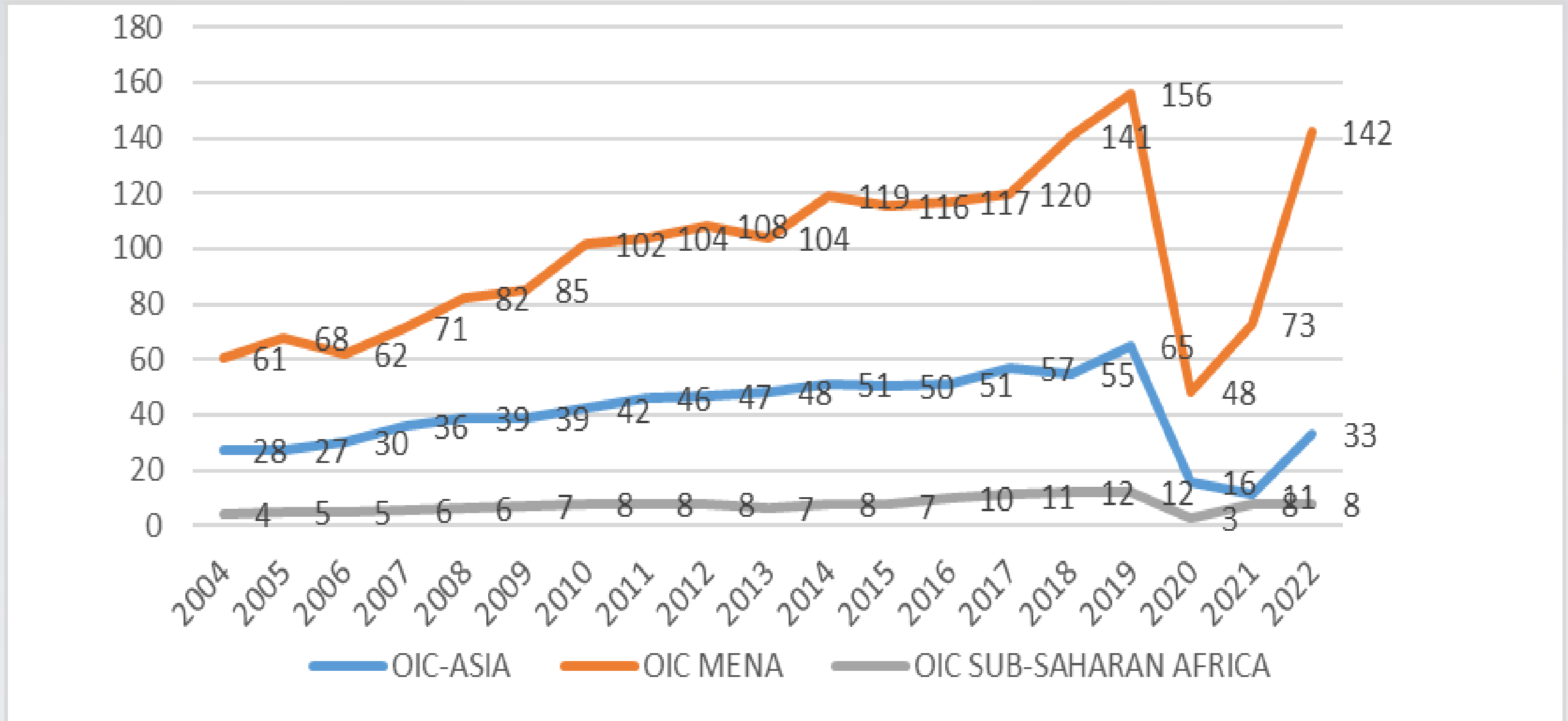
(Billion \$)



Source: Adopted from UNWTO, 2023c (Last available data for OIC countries were used)

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

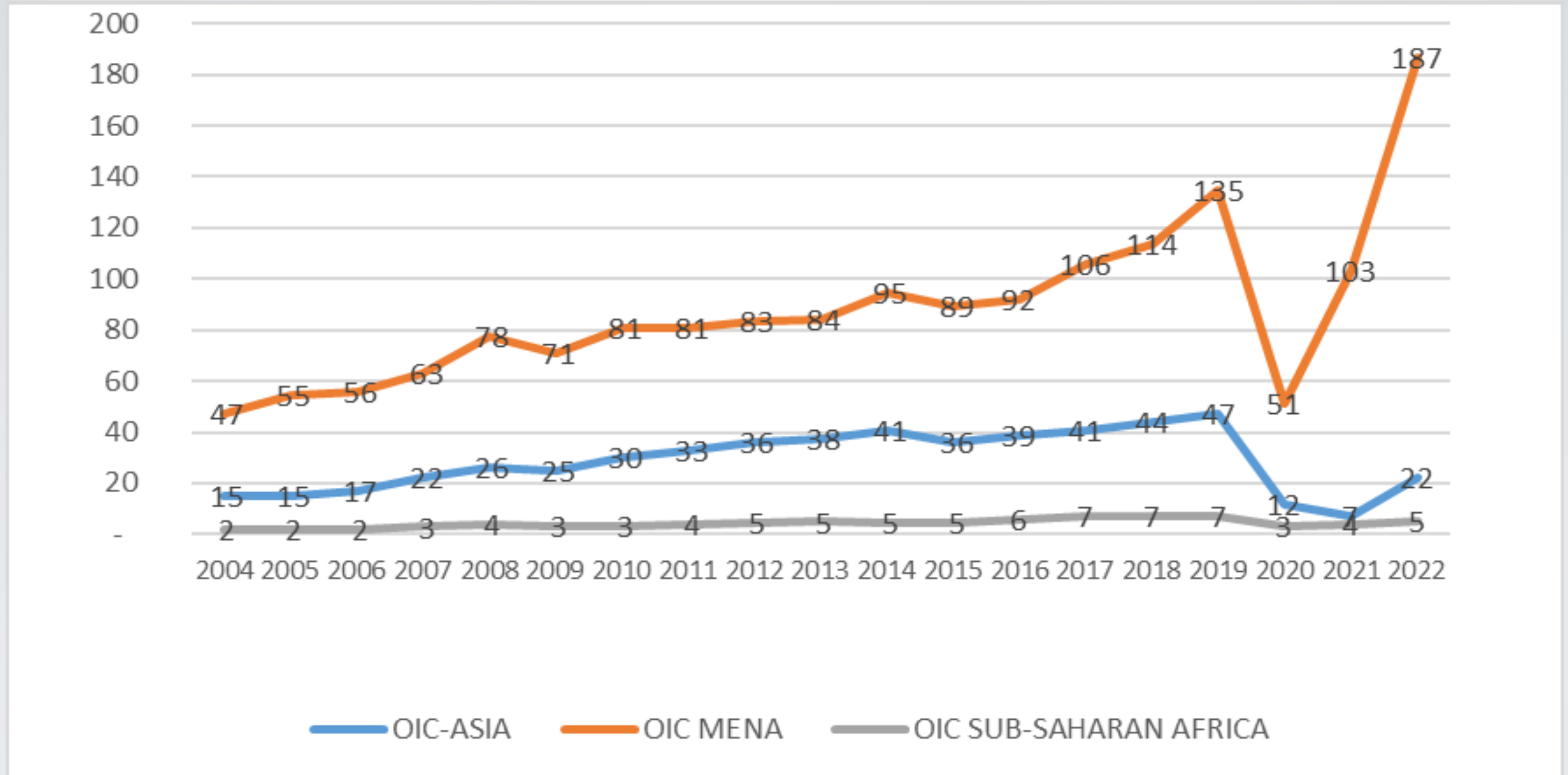
(Millions)



Source: Adopted from UNWTO, 2023c (Last available data for OIC countries were used)

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

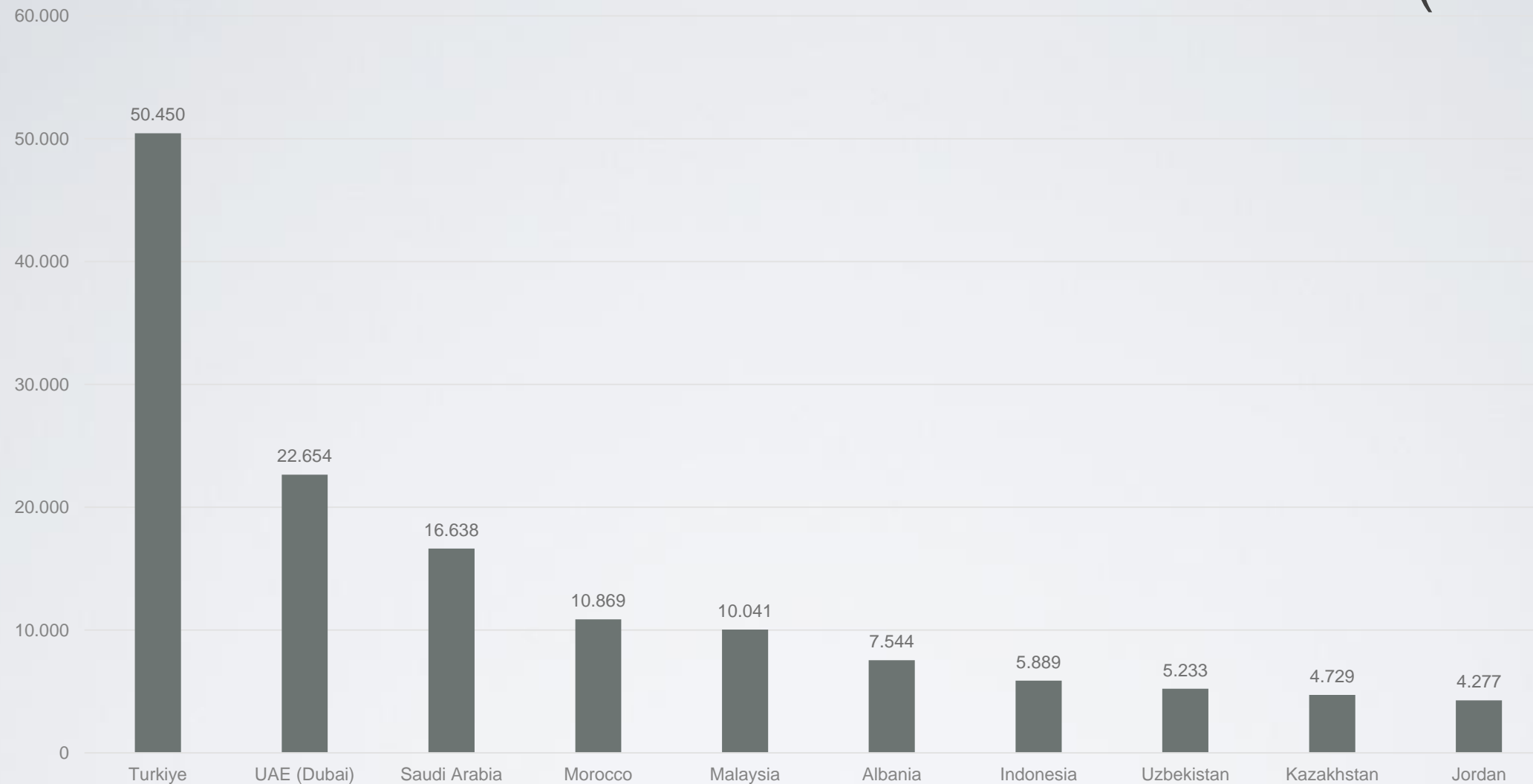
(Billion \$)



Source: Adopted from UNWTO, 2023c (Last available data for OIC countries were used)

Top 10 OIC Tourism Destinations in International Tourist Arrivals (2023)

(Thousands)

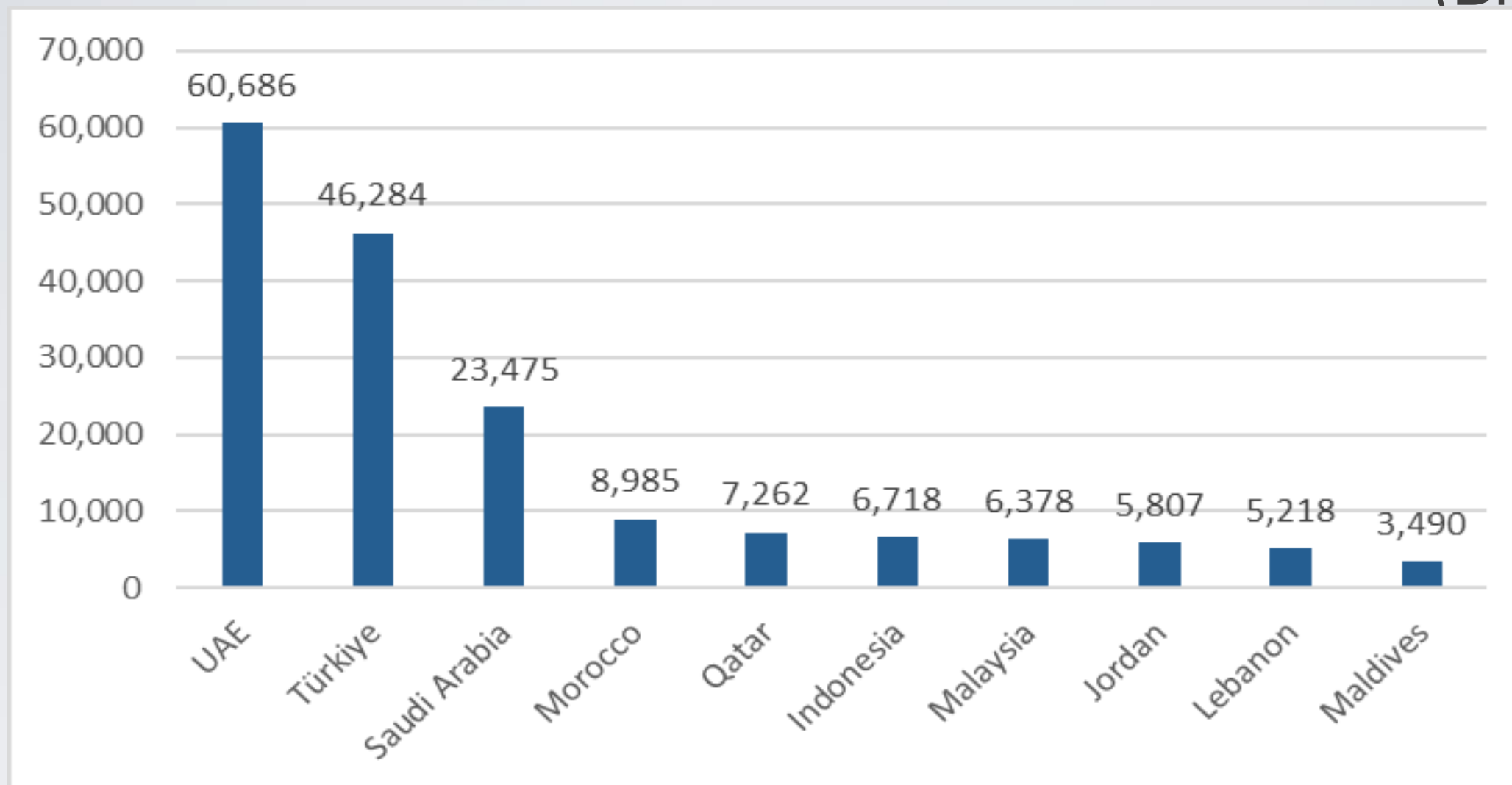


Source: Adopted from UNWTO, 2023c (Last available data for OIC countries were used)

☐ Top-10 countries hosted **138 million international tourist** in 2022.

Top 10 OIC Tourism Earners in International Tourism (2023)

(Billion \$)



□ Top-10 countries earned **US\$ 175 billion** as international tourism receipts in 2022.

Recent Developments in the OIC Member Countries

- ▶ Türkiye (4th) and Saudi Arabia (13th) were ranked in the top 20 countries in terms of arrivals in the World.
- ▶ UAE (4th), Türkiye (6th) and Saudi Arabia (11th) were also ranked at top 20 list in terms of receipts in the World in 2022.
- ▶ Gulf countries experienced and extraordinary growth compared to pre-pandemic year of 2019. Mega events in the region (e.g. World Cup, World Expo) not only attracted millions but also increased average spending.

Source: UNWTO, 2017

Recent Developments in the OIC Member Countries

- OIC members in Asia such as Malaysia and Indonesia have suffered from the impacts of pandemic and extended travel restrictions on their source markets.
- Countries with limited restrictions during Covid-19 such as Albania, Uzbekistan and Kazakhstan had made it to the top ten list in 2022.
- The visa regime of countries towards Russian citizens also affected the results.

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**

COMCEC ANALYTICAL TOPICS (2023 – 2024)





Making Cooperation Work

COMCEC STRATEGY

For Building an Interdependent Islamic World

THANK YOU

www.comcec.org

comcec@comcec.org



COMCEC

Gurel CETIN, PhD
Comcec Coordination Office
October, 2019