Promoting Regional Tourism Cooperation under CAREC 2030

Regional Consultation Workshop
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Outline Presentation

1. Context

2. International tourism performance, trends and future prospects

3. Strengths and opportunities

4. Challenges

5. Tourism clusters and areas for potential collaboration

6. Recommendations – Way Forward

The center of the world

- The bridge between east and west
- The heart of the world's largest continent –high mountains, greatest deserts, largest inland seas
- Birthplace of civilizations
- Great empires of history
- Art, architecture and science
- Spread of religions and languages
- Vast natural and mineral resources
- 21st century strategic and investment focus
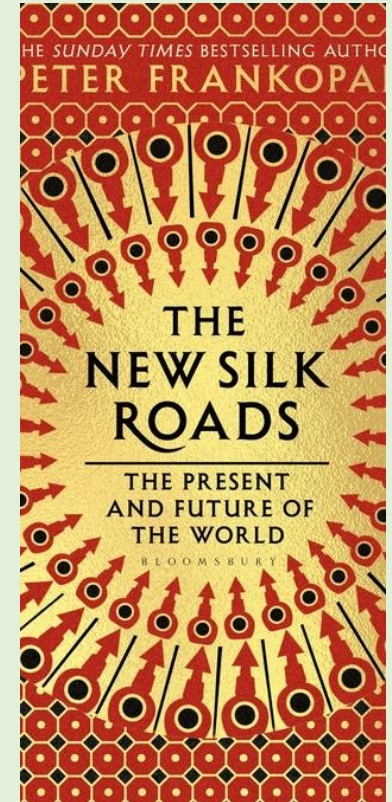
International tourism trends

❑ Tourism growing faster than GDP since 2010
- Increase in international tourism arrivals average 4.8%
- 3% growth in global GDP

❑ Reasons for travel remain fairly constant
- Leisure, recreation, holidays: 53%
- Visits to friends and relatives (VFR), health, religion, other personal: 27%
- Business and professional: 13%
- Other: 7%

❑ Influences on travel decisions have evolved significantly through IT

Taken in a global context, the aggregate share of CAREC countries' tourism arrivals is less than 2% at present.

GREAT POTENTIAL FOR GROWTH

POTENTIAL TO HELP ACHIEVE THE SDGs

Key Growth Segments

❑ Adventure tourism

- Average annual growth rate of 17.4 % (2017–2023)
- Europe, America and Asia-Pacific are driving this growth
- There are 'hard' and 'soft' forms of adventure tourism

❑ Cultural tourism

- One of the largest and fastest-developing global tourism markets
- An estimated 4 out of 10 tourists choose their destination based on its cultural offering
- Importance of intangible factors: atmosphere of a place, famous people, and cultural events

Tourism in the CAREC region

Two broad segments of leisure travel of relevance to the CAREC region today:

- **adventure tourism**
- **culture tourism**

Other significant segments which CAREC countries can further exploit:

- **city tourism**
- **business tourism**
- **event tourism**

Future Prospects in the CAREC region

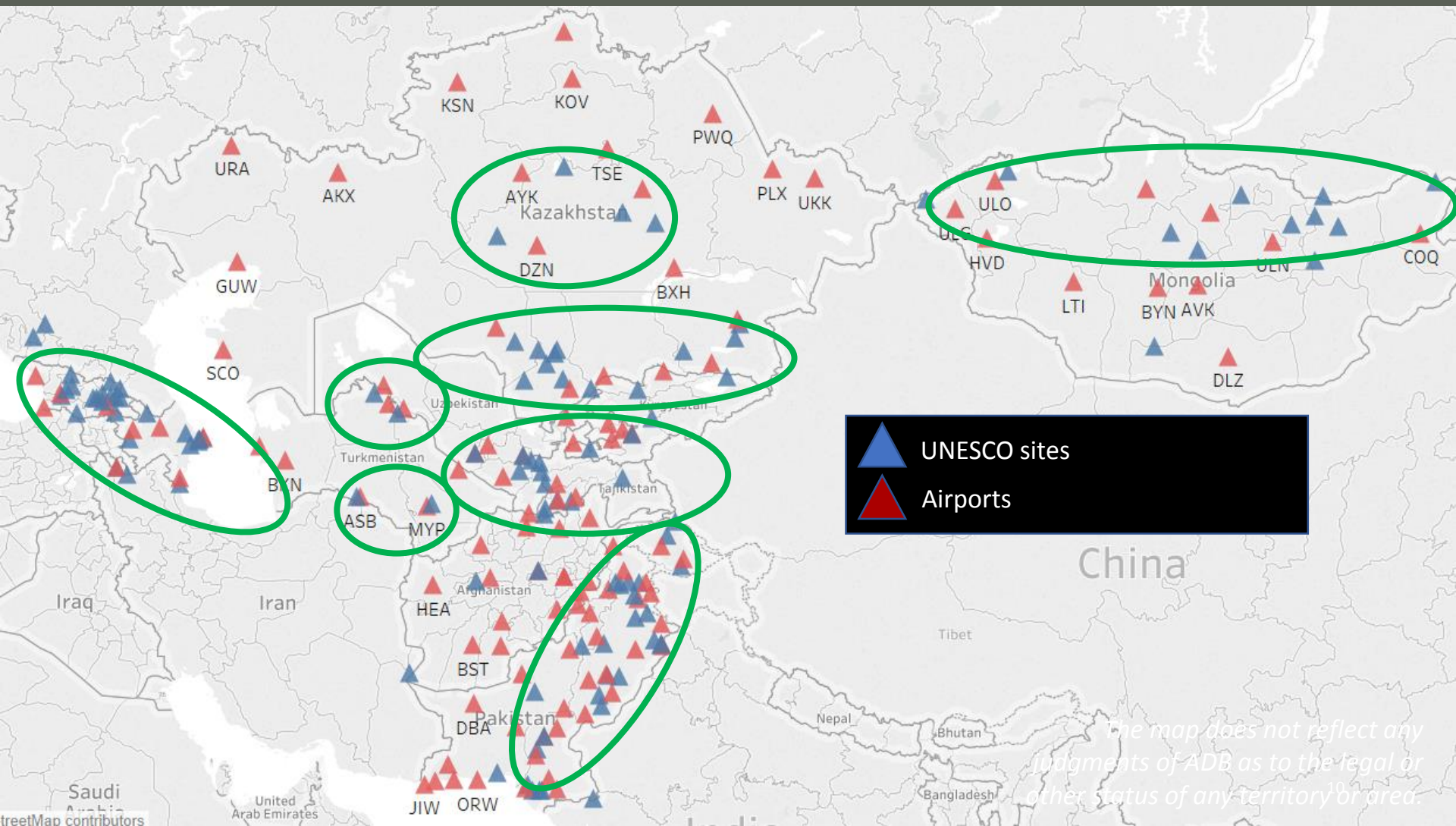| Forecasts of Tourist Arrivals and Visitor Spending in CAREC Countries, 2018-2028				
CAREC Country	Forecast 2018 Tourist Arrivals '000	Forecast 2028 Tourist Arrivals '000	% p.a. growth rate 2018-2028 in Tourist Arrivals	% p.a. growth rate 2018-2028 in Visitor Spending
Azerbaijan	2,125	3,235	4.3	6.1
Georgia	3,500	6,125	5.8	5.4
Kazakhstan	6,010	8,658	3.7	3.5
Kyrgyzstan	4,088	6,130	4.1	3.5
Mongolia	474	1,021	8.0	4.0
Pakistan	1,252	2,054	5.1	6.4
Tajikistan	218	263	1.9	2.0
Uzbekistan	2,066	4,238	7.5	6.9
Overall	19,733	31,724	4.9	n.a. as averages based on local currencies in each country

Strengths

- Outstanding range of unspoiled natural resources

- Steppe, mountain and desert cultures; historic cities and ancient empires; and diverse ethnic groups and cultures

- Quality of lodging and other tourism facilities in capital cities

- Support from governments for tourism development

- "New" destinations for visitors to discover

- CAREC as a trusted development platform to advance regional tourism cooperation

- UNESCO World Heritage Sites close to airports/cities (many Silk Road-related)

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CAREC has many tourism & UNESCO sites near airports

Legend:
- UNESCO sites
- Airports

The map does not reflect any judgments of ADB as to the legal or other status of any territory or area.

Source: CAREC. 2018. *Aviation and the Role of CAREC: A Scoping Study*

Opportunities

- Growing profile of the Silk Road

- Growth trends in international tourism:

  - International tourism forecast to continue to grow at strong rates (Asia in particular)

  - Tourists are increasingly seeking new experiences, authenticity and off-the-beaten track destinations

- Rise of information technology

- New infrastructure linkages under development

- Potential role of tourism in the achievement of the SDGs

Challenges

Appeal
Brand and image perception among consumers

Accessibility
Air and land connections, and visa regulations and border arrangements

Tourism Products
Range and quality of things to see and do related to the interests of the market segments

The success of any destination is a function of a combination of factors:

Personal Safety
Medical facilities and security

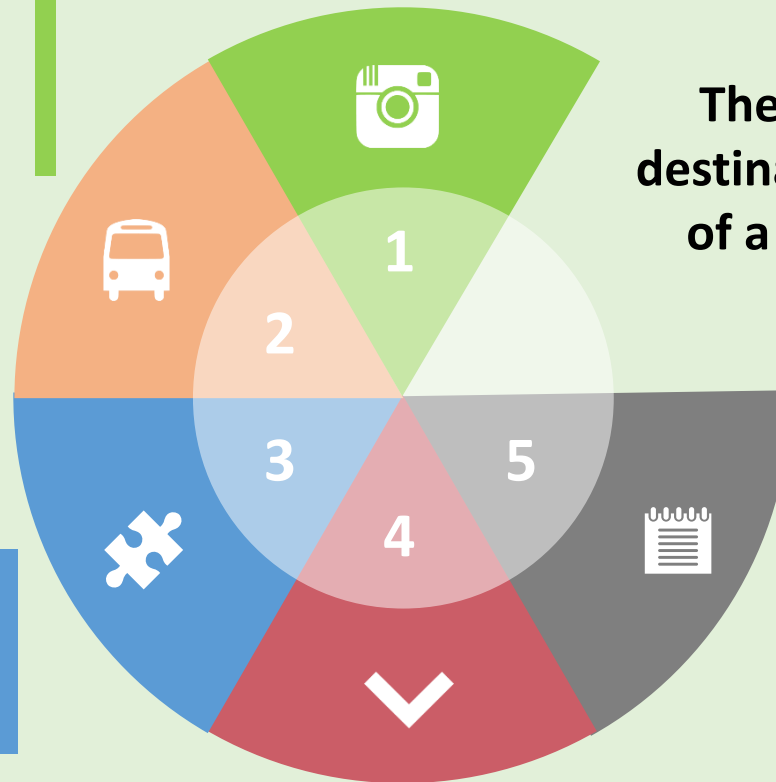**Standards and Service**
Quality of tourist facilities and service delivery of tourism personnel to internationally expected standards

Challenges

- Good awareness of "Silk Road" but limited intention to visit CAREC countries

- Poor air connectivity and inadequate transport infrastructure and facilities on tourist routes

- Complex visa regimes and difficult border crossings for tourists

- Visitors have limited time to travel throughout the region

- Limited tourism experiences to appeal to the middle, non-specialist market segments

- Shortage of skilled workers and language barriers

- Challenging security conditions in certain areas of the CAREC region

- Institutional arrangements where public and private sectors work in unison

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Tourism Clusters: Subregional-based partnerships and shared geographic features

- <u>Caucasus</u>: Azerbaijan and Georgia

- <u>Caspian Sea</u>: Azerbaijan, Turkmenistan and western Kazakhstan

- <u>Almaty-Bishkek Economic Corridor</u>: south-eastern Kazakhstan and Kyrgyz Republic

- <u>Central Core States</u>: south-eastern Kazakhstan, Kyrgyz Republic, Uzbekistan and Tajikistan

- <u>Eastern Sub-region</u>: Mongolia and the Chinese autonomous regions

- <u>Altai region</u>: Mongolia, Xinjiang and Kazakhstan

- <u>Himalayan</u>: Pakistan and Afghanistan

- <u>Pamir mountain range</u>: Tajikistan, Afghanistan and Kyrgyzstan.

- <u>Rivers</u>: Amu Darya and Siri Darya (the Oxus and the Jaxartes), the Indus.
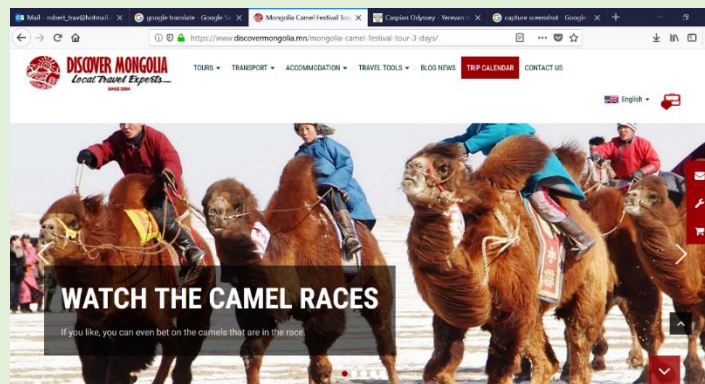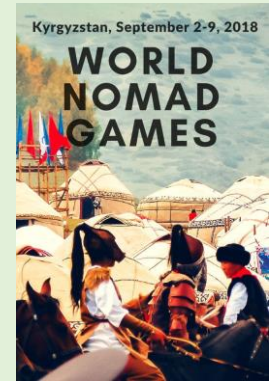
Tourism Clusters: Thematic-based partnerships

- <u>Mountain trekking and climbing</u>: Pakistan and Afghanistan; Tajikistan and Kyrgyz Republic; Tajikistan and Uzbekistan; Kazakhstan and Kyrgyz Republic

- <u>Cultural heritage</u>: all countries have shared aspects of heritage with their neighbours. UNESCO sites offer an immediate opportunity for cross-border visits.

- <u>Combined mountain and cultural/historic features</u>: Afghanistan, Pakistan, Tajikistan and Kyrgyz Republic (Wakhan Pamir) + Uzbekistan (Lapis Mines), ecotourism and wildlife, nomadic cultures.

- <u>Religions</u>: Buddhism, Islam and Islamic architecture, Christianity in east and west.

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Tourism Clusters: Thematic-based partnerships

- <u>Historical figures</u>: Alexander the Great, Emperor Wu of Han, Genghis Khan, Temur the Great, Babur, explorers through the region like Zhang Qian, Ibn Battuta and many more.

- <u>Trade goods</u>: silk, salt, tea, crafts.

- <u>The Great Game then and now</u>: Britain, Imperial Russia, post-Soviet relics and today's evolving picture.

- <u>The Silk Roads</u>

- <u>Desert tourism</u>

- <u>Rail holidays</u>

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Areas for Potential Collaboration

- <u>Facilitation of visa processes</u> and border crossing arrangements

- <u>Tourism development and marketing</u> based around the Silk Road routes

- Researching and creating <u>destination image and branding</u> on a sub-regional basis, under an overall CAREC region marketing umbrella

- Sharing <u>tourism statistics</u> and market information

- Development of appropriate regional <u>tourism experiences</u> along with upgraded and expanded facility and service standards

- CAREC certification schemes for the different types of tourism facilities

- <u>Tourism education and training</u> - common curricula and qualifications

- Improvement of <u>public-private coordination</u> and collaboration

- Development of a standard <u>regional investment framework</u> for foreign investors

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Recommendations: Way Forward

- Establish a <u>CAREC Tourism Working Group</u>

- Establish a <u>CAREC virtual tourism support database</u> / portal to share knowledge

- Develop a more detailed <u>CAREC Tourism Strategy</u> setting out a vision and a roadmap towards 2030

- Develop <u>sub-regional partnerships</u> of countries willing to work on joint activities (product development, cross-border tourism, marketing)

- Identify <u>funding support mechanisms</u> to accelerate access improvements, tourism product development and marketing of CAREC and its sub-regions

Спасибо за то, что вы слушали
Thank you for listening