



Tourism Potential Along CAREC Economic Corridors



5th CAREC Think Tanks
Development Forum

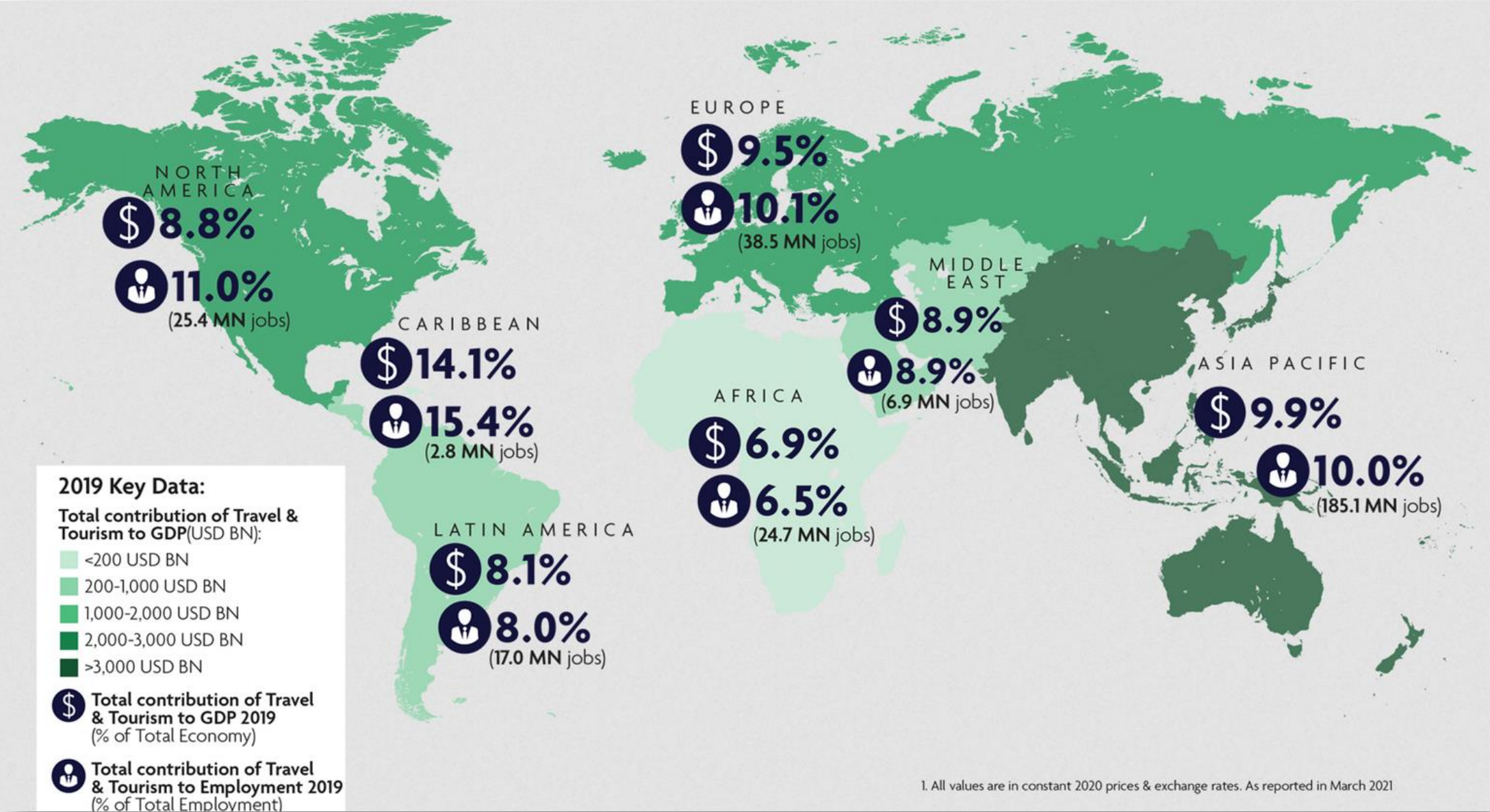
ECONOMIC CORRIDORS: PATHWAYS TO REGIONAL GROWTH



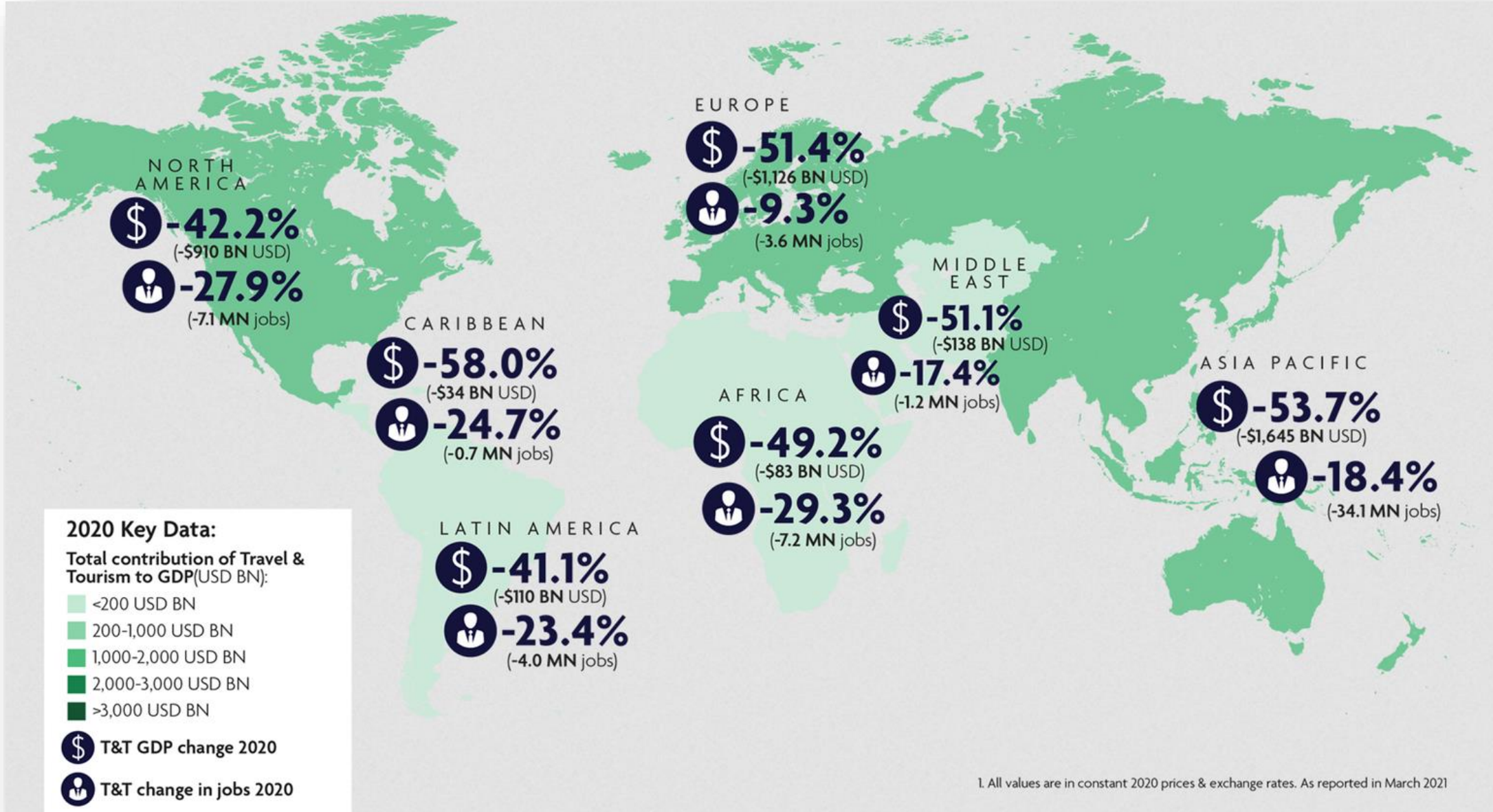
Sanjay Saxena



Global Tourism Overview 2019



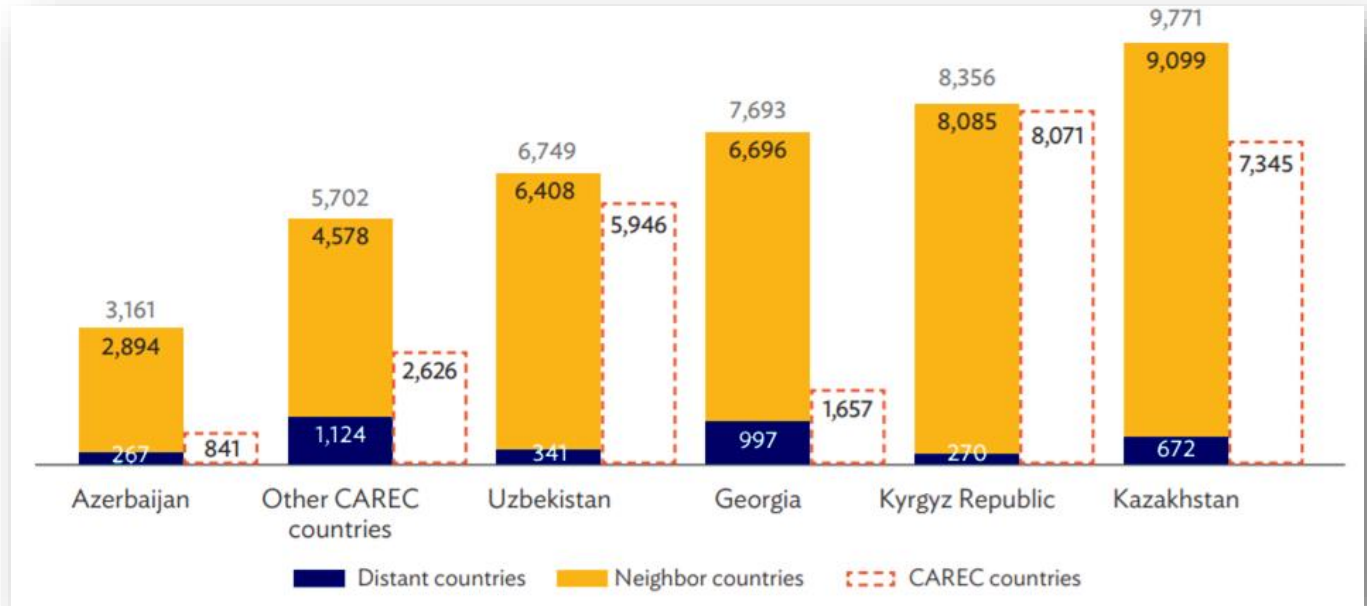
Global Tourism Overview 2020



Tourism in CAREC

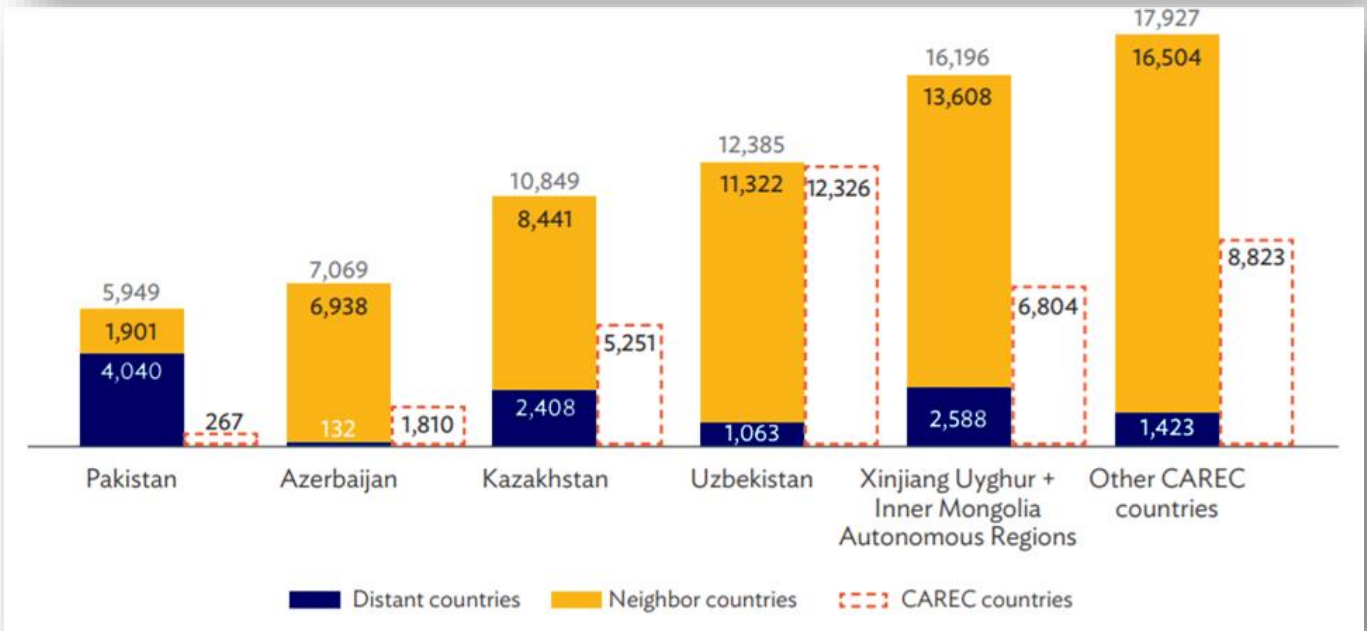
Kazakhstan, Kyrgyz Republic, Georgia and Uzbekistan account for the majority of inbound tourists in CAREC. Of these, Georgia receives most of its tourists from outside CAREC, while the remaining receive inbounds largely from the region itself.

Inbound Tourists ('000 trips)

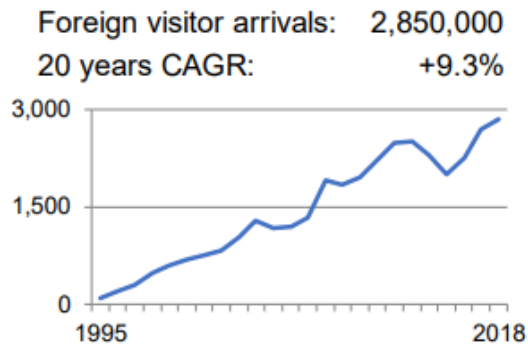


Apart from the regions in PRC, Uzbekistan attracts the maximum of inbound tourist in CAREC, almost all of which are from within the region. On the other hand, Kazakhstan, Azerbaijan and Pakistan receive a majority of their inbound tourists from outside CAREC.

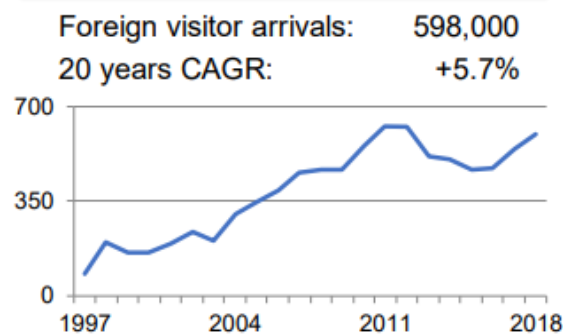
Outbound Tourists ('000 trips)



Visitor Trends



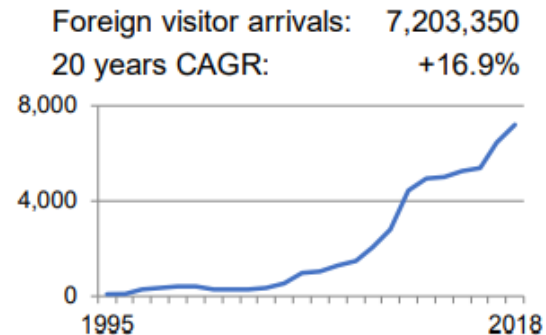
Azerbaijan



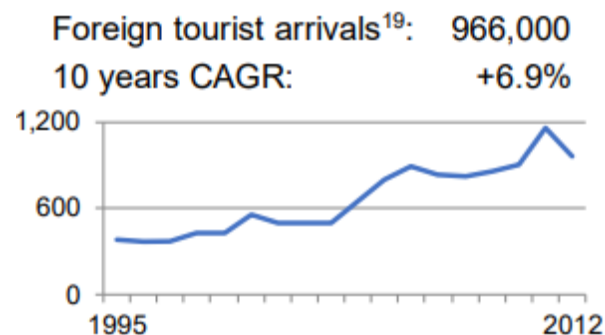
Mongolia



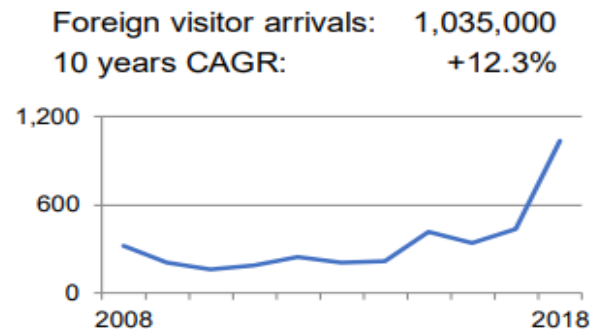
Uzbekistan



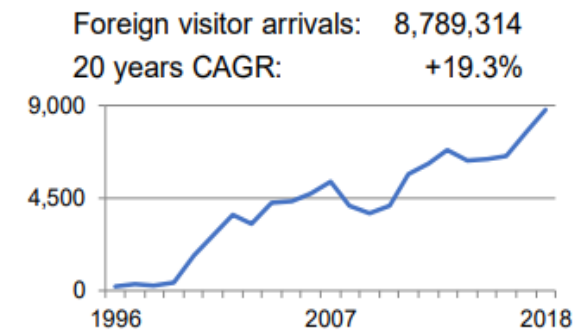
Georgia



Pakistan



Tajikistan



Kazakhstan



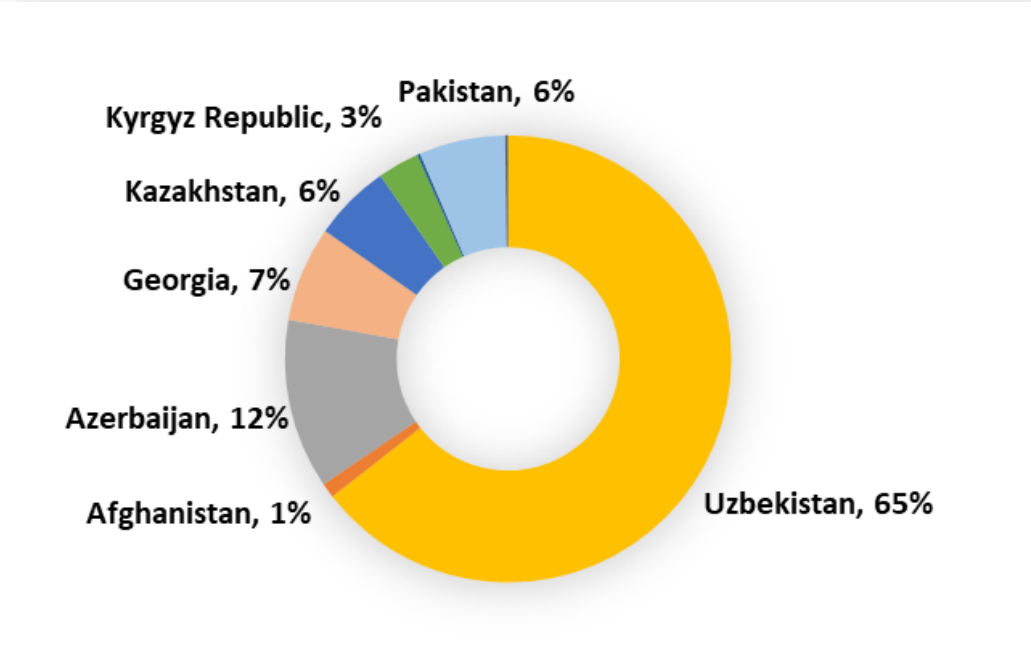
China



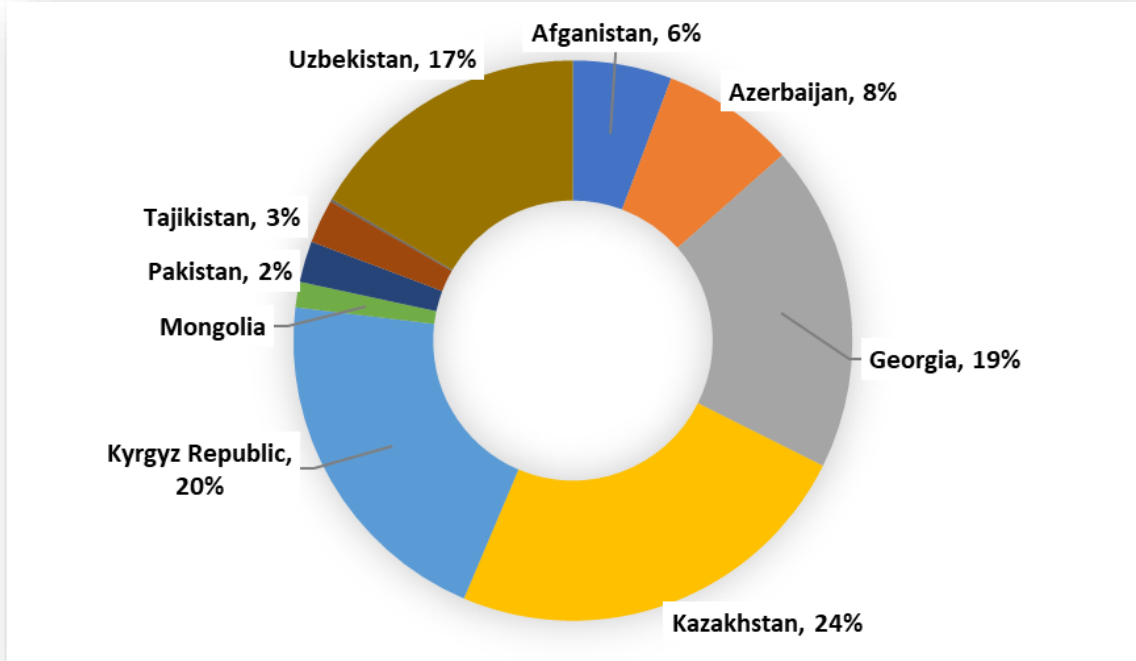
Kyrgyz Republic

Tourist Distribution

Distribution of Domestic Tourists (2019)



Distribution of International Tourists (2019)

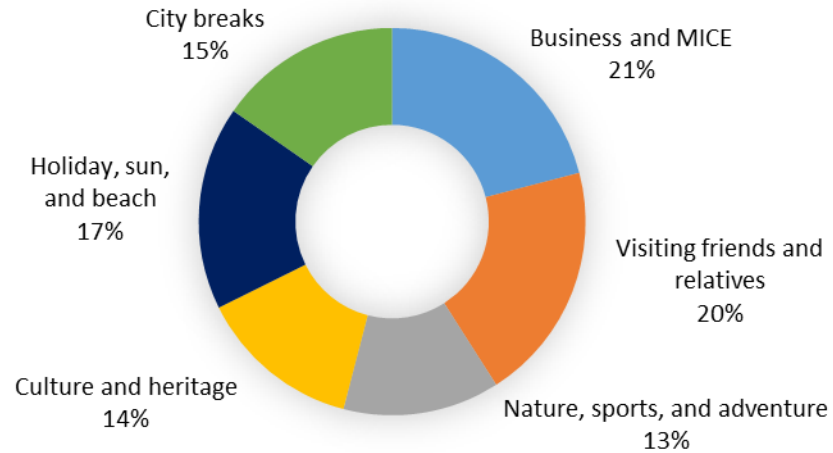


Uzbekistan accounts for the highest percentage of domestic travel with more than 65% of all domestic tourists. Of the remaining countries, Azerbaijan, Georgia and Kazakhstan have a significant share.

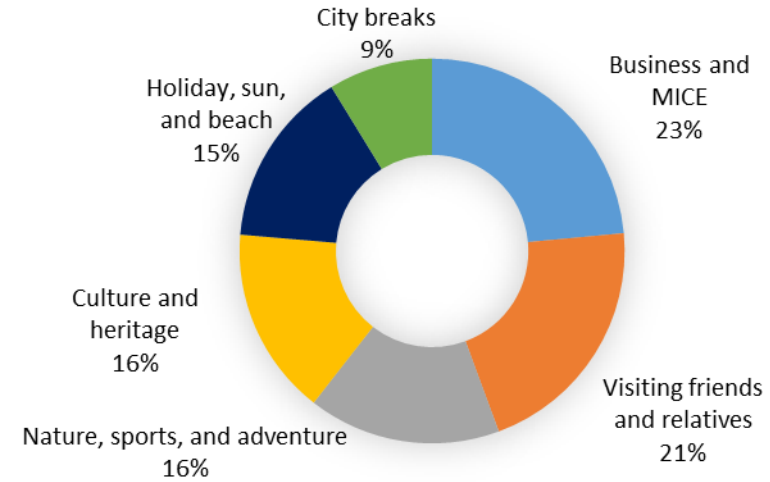
Kazakhstan, Kyrgyz Republic, Uzbekistan and Georgia are the most popular CAREC destinations among international visitors making up for more than 75% of all international tourists

Travel Motivation

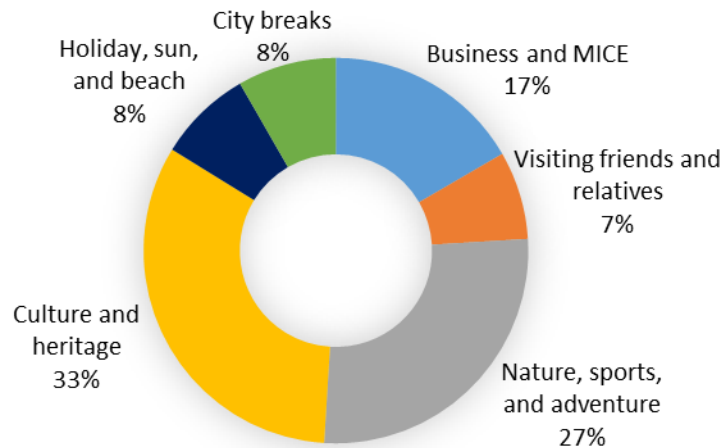
Domestic



Neighboring Countries



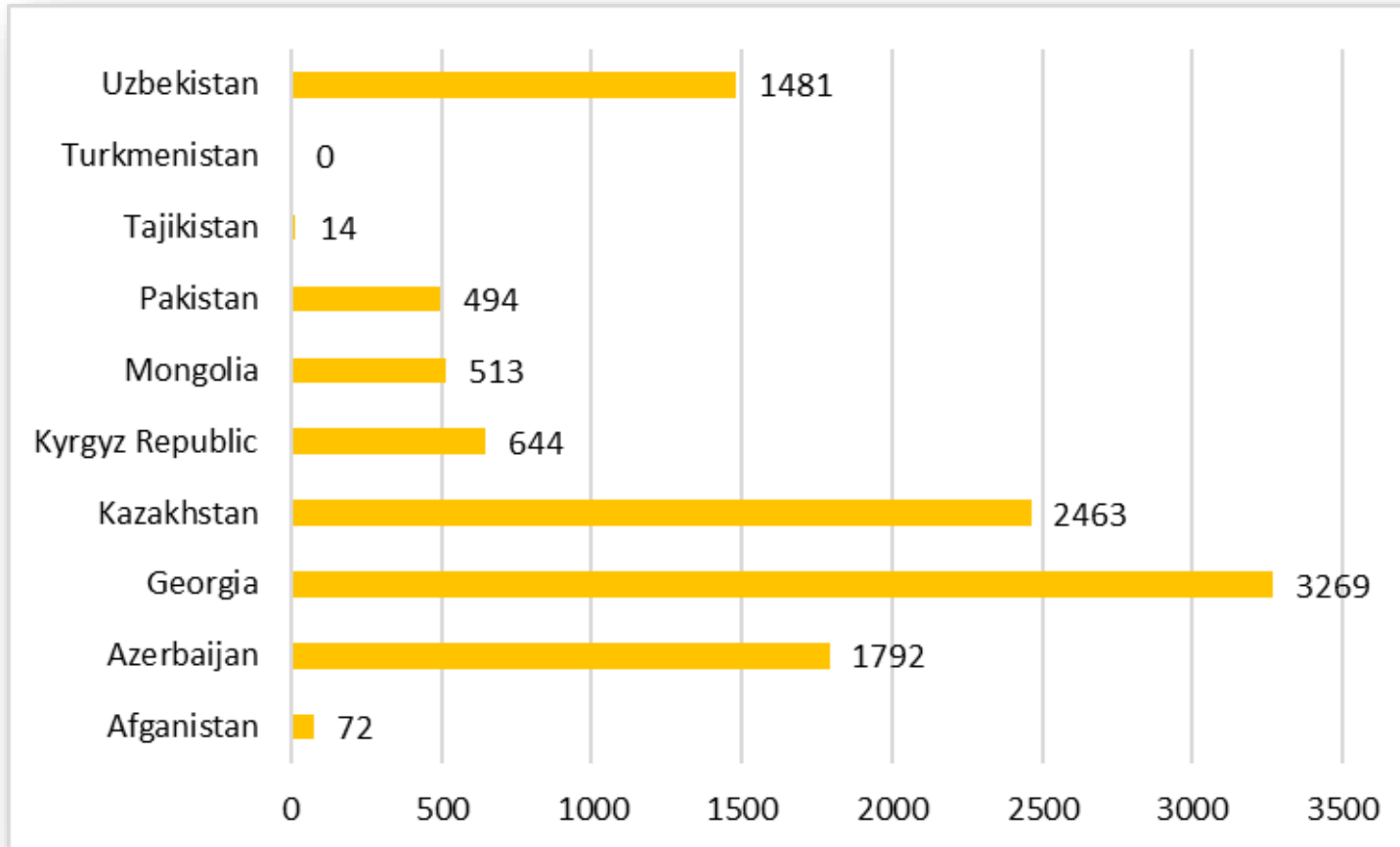
Distant Markets



The travel motivations for domestic visitors and visitors from neighboring country are significantly different from those from distant markets. Majority of the former travel for business and MICE or for visiting friends and relatives as well as for holiday, sun and beach. On the other hand, visitors from distant holidays hardly travel for business or visitation, and are motivate to travel because of culture and heritage or nature sports and adventure.

Tourist Spend

International Tourism, Expenditure (Million USD)



Despite being the 3rd most popular destination for international tourists in CAREC, Georgia leads the region in tourist expenditure (USD 3.2 Bn), a sign of attracting higher-end travelers. Kazakhstan, Azerbaijan and Uzbekistan follow all with more than USD 1 Bn tourist expenditure.

Visa Requirements

CAREC Countries

Traveling from Traveling to	AFG	AZE	PRC	GEO	KAZ	KGZ	MON	PAK	TAJ	TKM	UZB
AFG		C	C	C	C	C	C	C	C	C	C
AZE	C		A/B	F	F	F	B	B	F	B	F
PRC	C	C		C	C	C	C	C	C	C	C
GEO	B	F	B		F	F	B	B	F	F	F
KAZ	C	F	C	F		F	F	C	F	C	F
KGZ	B	F	B	F	F		F	B	F	B	F
MON	C	C	C	C	F	F		C	C	C	C
PAK	C	C	C	C	C	C	C		C	C	C
TAJ	B	F	B	F	F	F	A/B	B		A/B	F
TKM	C	C	C	C	C	C	C	C	C		C
UZB	B	F	B	F	F	F	B	B	F	B	

A = visa on arrival, B = eligible for e-visa, C = visa required prior to travel, F = visa-free

Visitor-Friendly Visa Requirements

Azerbaijan, Georgia, Kazakhstan, Kyrgyz Republic, Tajikistan and Uzbekistan

Restrictive Visa Requirements

Afghanistan, China, Pakistan, Mongolia and Turkmenistan

International Markets

Traveling from Traveling to	GER	USA	BRA	ZAF	UAE	JPN	SIN	IND	AUS
AFG	C	C	C	C	C	C	C	C	C
AZE	B	B	B	B	A/B	A/B	A/B	B	B
PRC	C	C	C	C	F	F	F	C	C
GEO	F	F	F	F	F	F	F	B	F
KAZ	F	F	F	C	F	F	F	C	F
KGZ	F	F	A/B	A/B	F	F	F	B	F
MON	F	F	F	C	C	F	F	C	C
PAK	C	C	C	C	C	C	C	C	C
TAJ	A/B	A/B	A/B	A/B	A/B	A/B	A/B	B	A/B
TKM	C	C	C	C	C	C	C	C	C
UZB	B	B	B	B	B	F	F	B	B

A = visa on arrival, B = eligible for e-visa, C = visa required prior to travel, F = visa-free

Visitor-Friendly Visa Requirements

Georgia, Kazakhstan, Kyrgyz Republic, Mongolia and Tajikistan

Restrictive Visa Requirements






Afghanistan, Pakistan and Turkmenistan

Key Areas of Growth



Tourist Sites Theme



-  Health and Wellness
-  Sun and Beach
-  Culture and Heritage
-  Nature and Adventure
-  MICE

Priority Tourism Clusters



Economic Corridor



Silk Route



Case Study: Santiago de Compostela, Spain

347,578
Pilgrims

Recorded Pilgrims
which requested
certificates*

Caminos/Routes:

- Frances: 189,937 (54.64%)
- Portuges Central: 72,357 (20.81%)
- Portuges Coastal: 22,292 (6.41%)

Motivation:

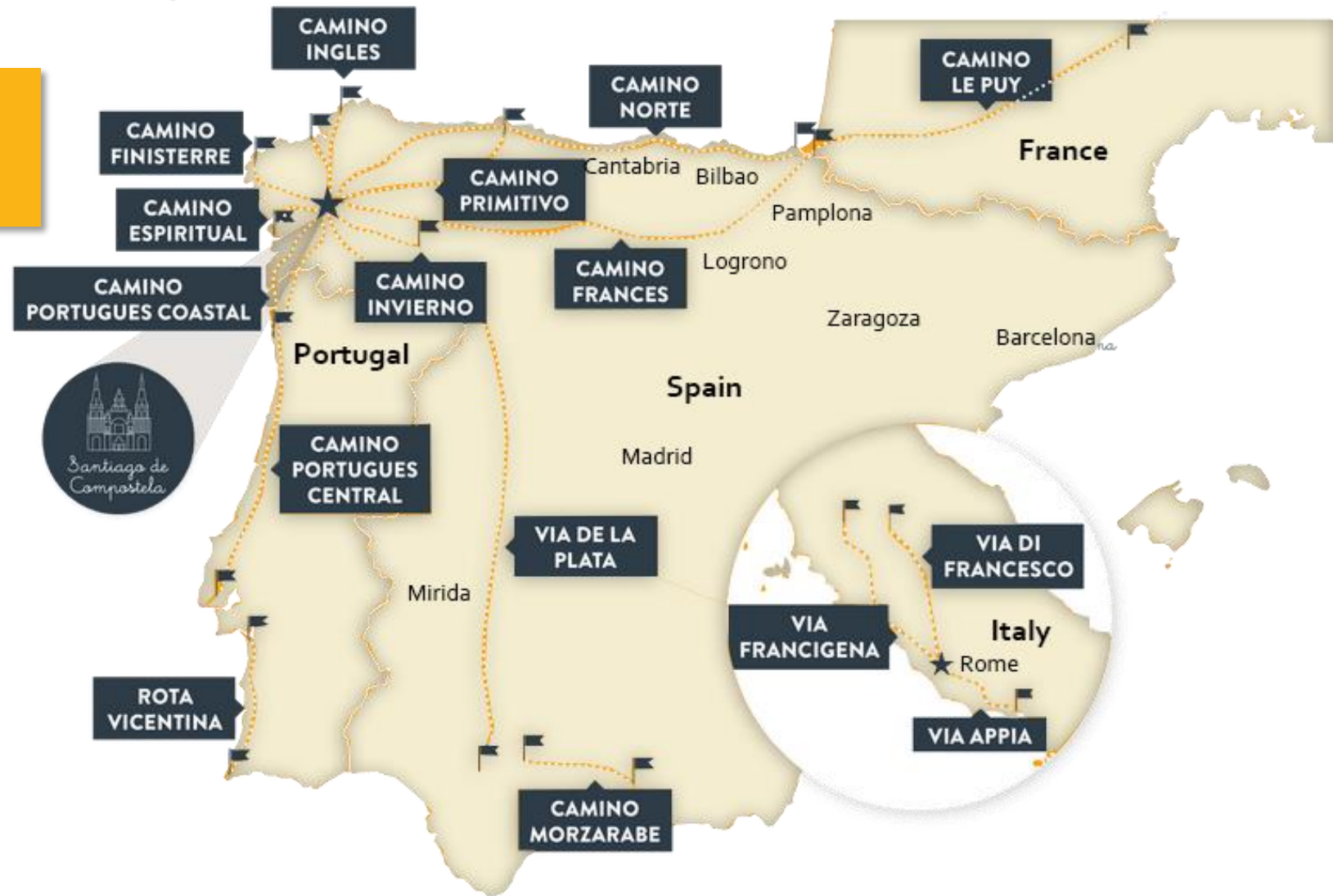
- Both Religious & Cultural: 166,841 (48.7%)
- Religious: 142,510 (40.3%)
- Cultural: 38,235 (11%)

Modes of Transport:

- Walking: 327,281 (94.16%)
- Bicycle: 19,563 (5.63%)
- Horseback: 406 (0.12%)

Nationality:

- Spain: 146,350 (42.1%)
- Italy: 27,749 (7.98%)
- Germany: 26,167 (7.53%)



*Does not include pilgrims who chose a different Jacobean route or section of the Camino that does not finish in Santiago; nor those who do not request the Pilgrim Certificate. Actual number are more.
Source: <https://oficinadelperegrino.com/en/statistics/>

Case Study: Appalachian Trail, USA

2,193

Miles

Length of the
Appalachian Trail

3+

Million

Annual Number of
Visitors at the Trail

14

States

Number of States
the Trail Traverses

930

Hikers

Number of Hikers
that Completed the
Entire Trail in 2019

165

Days

Average Number of
Days Taken to
Complete the Trail

241

Thousand

Annual Number of
Volunteers that
Manage the Trail





Key Recommendations

1

Improve Tourism Infrastructure

2

Improve Tourism Statistics and Data

3

Development of Silk Route Circuits

4

Adapting to Global Trends and Resilience

5

Creative Industries & Informal Sector Revitalization

6

Develop Economic Corridors and Thematic Clusters

7

Customized marketing strategies to target different segments

A



Presentation

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