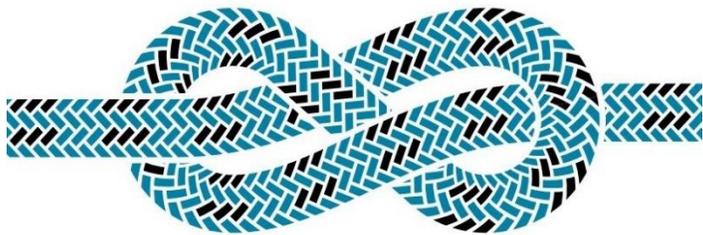




## Tourism Potential Along CAREC Economic Corridors



**5th** CAREC Think Tanks  
Development Forum

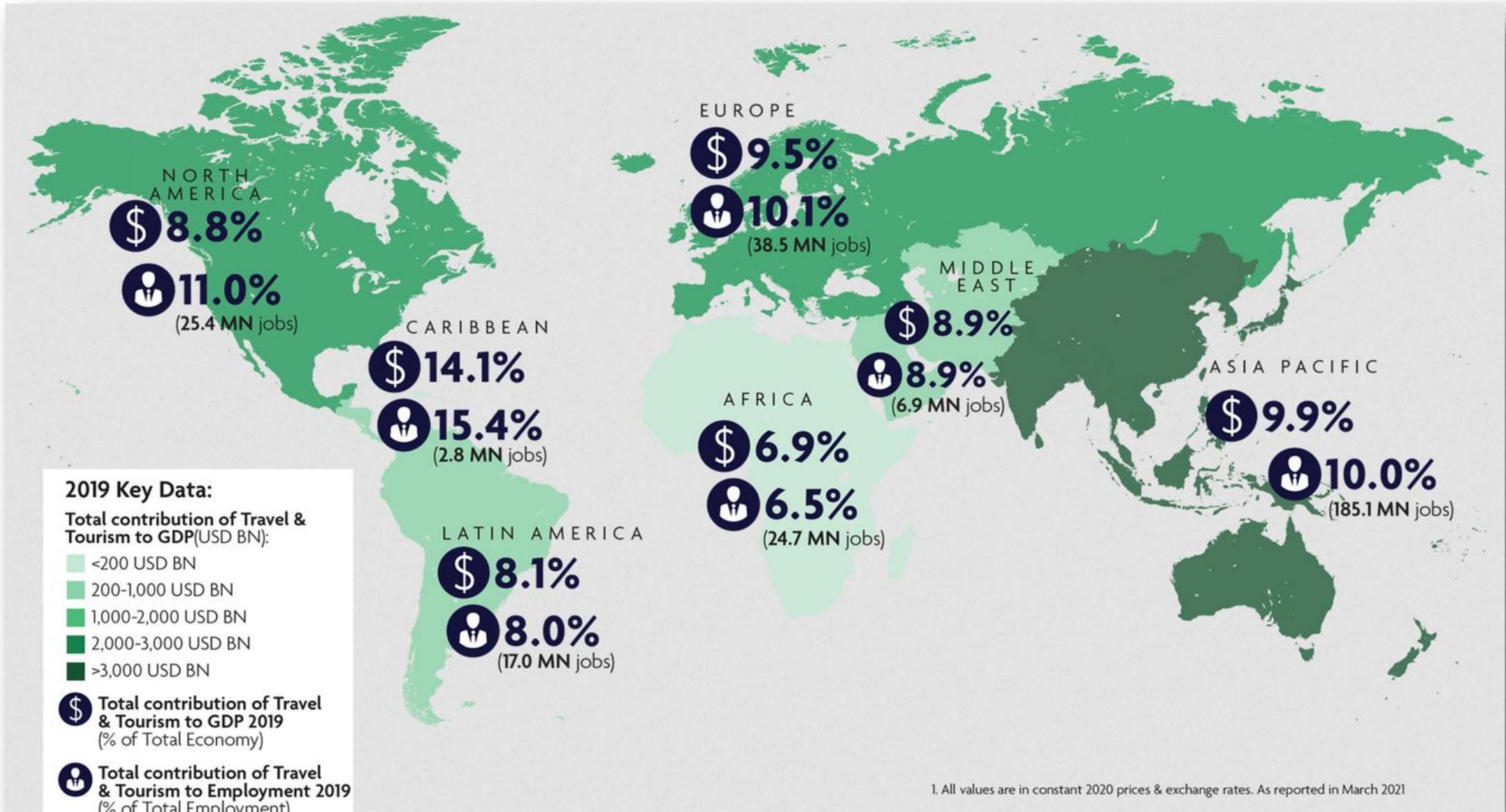
ECONOMIC CORRIDORS: PATHWAYS TO REGIONAL GROWTH



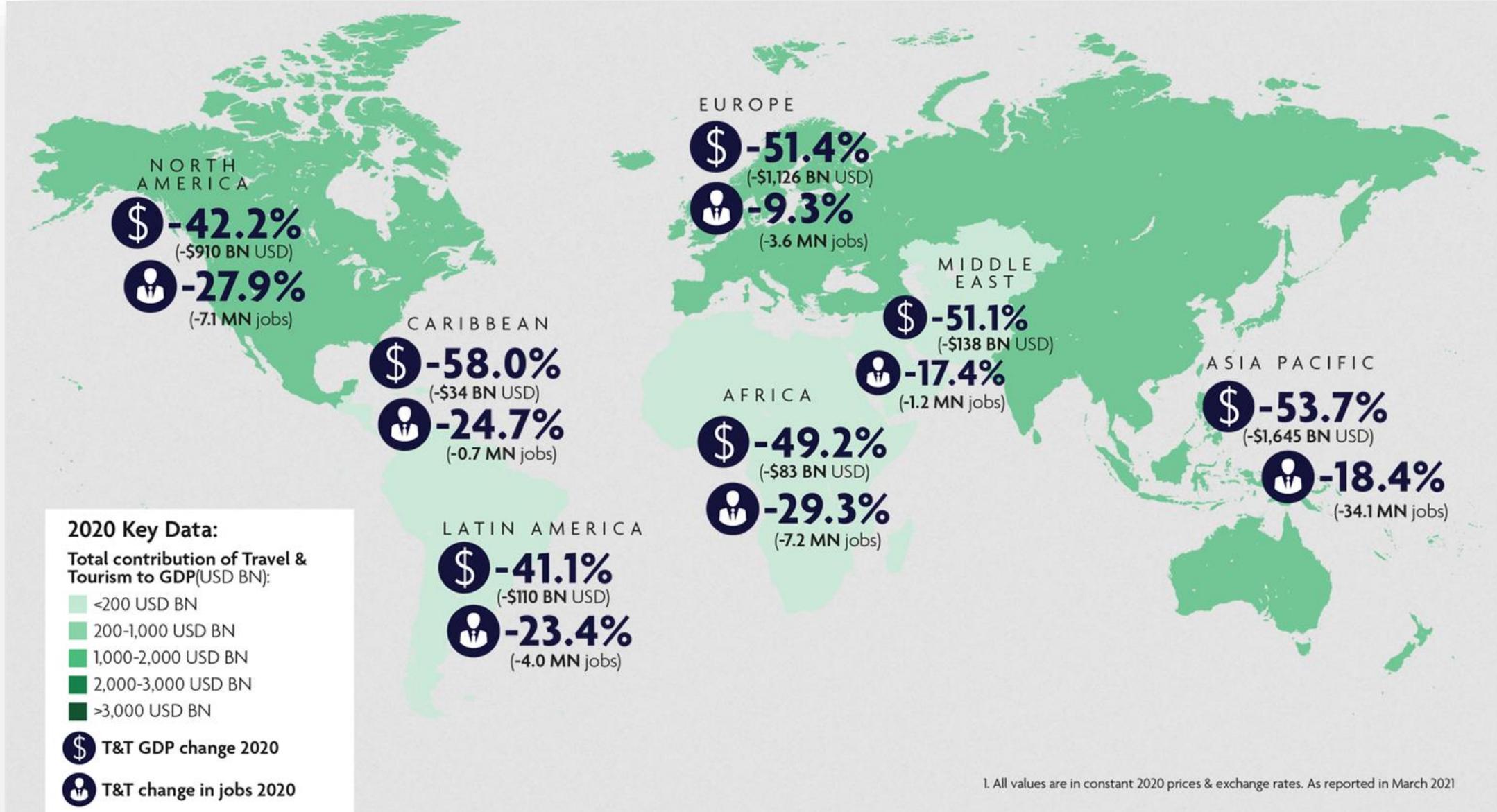
Sanjay Saxena



# Global Tourism Overview 2019



# Global Tourism Overview 2020

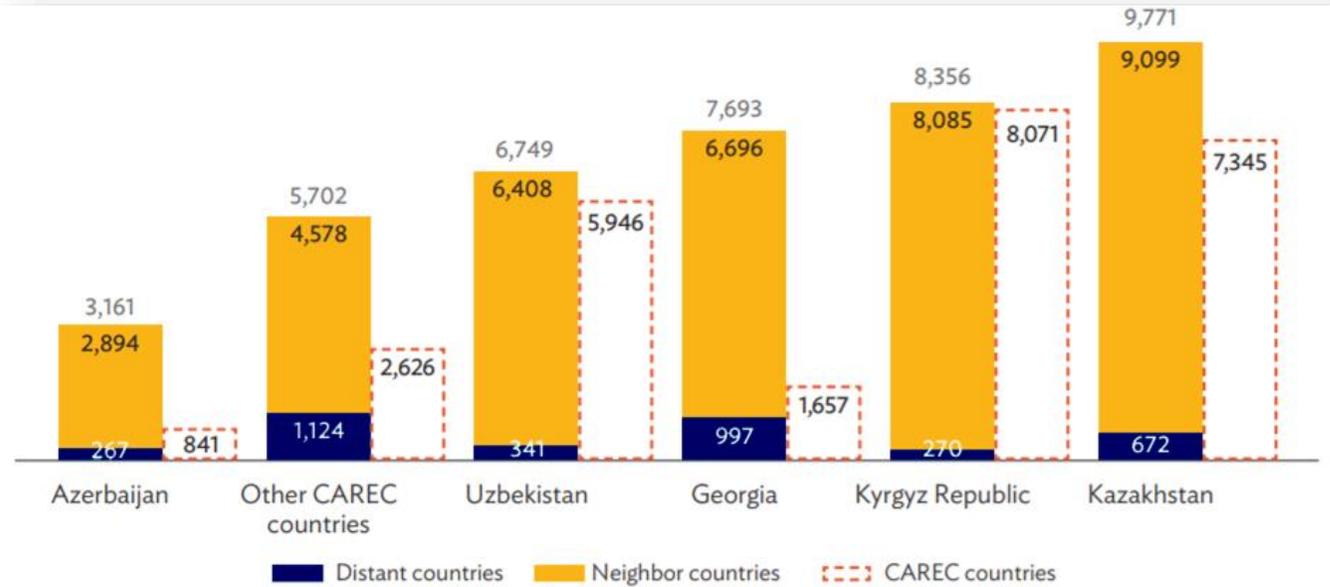


1. All values are in constant 2020 prices & exchange rates. As reported in March 2021

# Tourism in CAREC

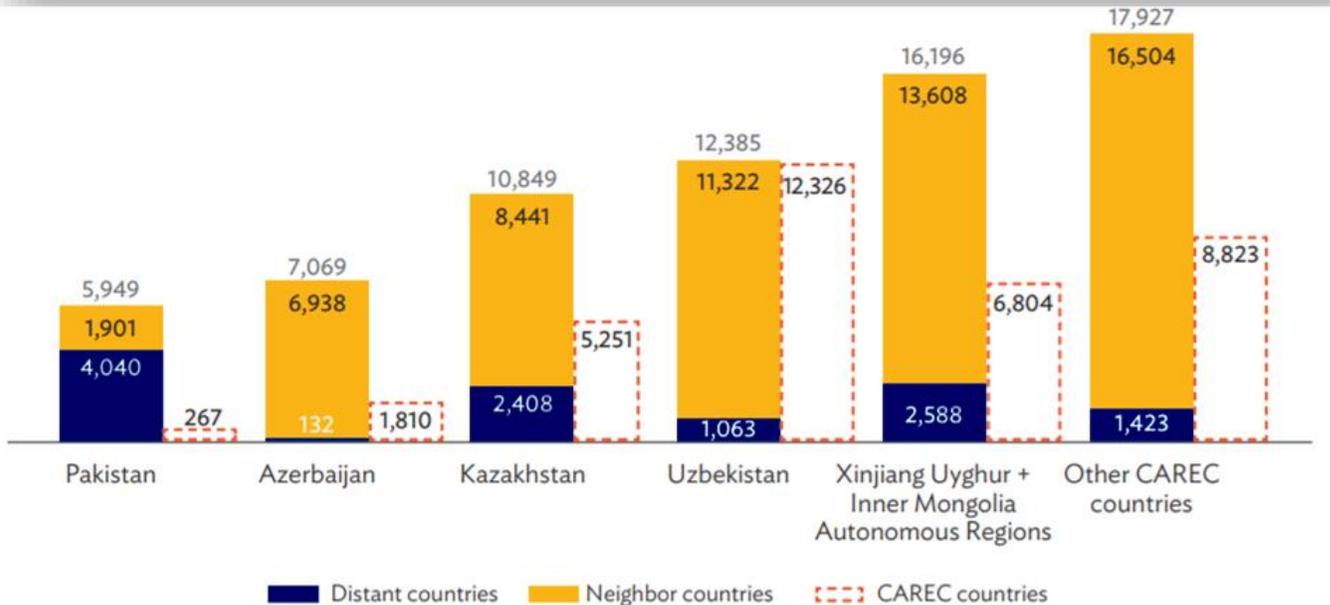
Kazakhstan, Kyrgyz Republic, Georgia and Uzbekistan account for the majority of inbound tourists in CAREC. Of these, Georgia receives most of its tourists from outside CAREC, while the remaining receive inbounds largely from the region itself.

**Inbound Tourists ('000 trips)**

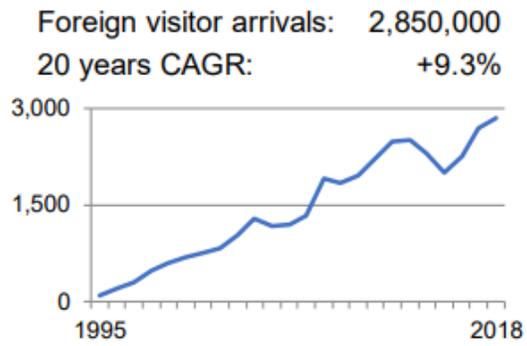


Apart from the regions in PRC, Uzbekistan attracts the maximum of inbound tourist in CAREC, almost all of which are from within the region. On the other hand, Kazakhstan, Azerbaijan and Pakistan receive a majority of their inbound tourists from outside CAREC.

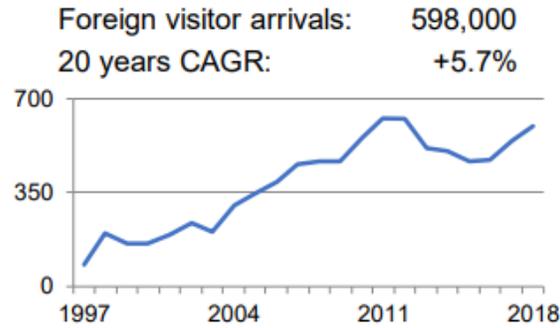
**Outbound Tourists ('000 trips)**



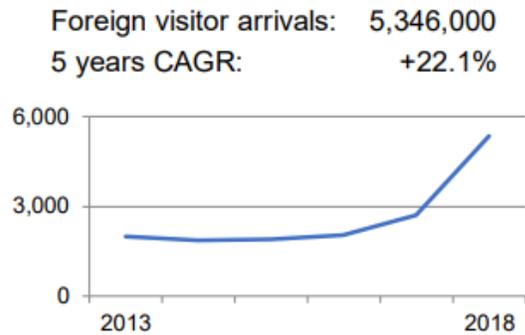
# Visitor Trends



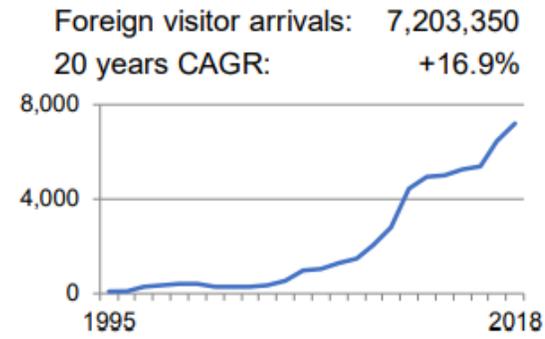
**Azerbaijan**



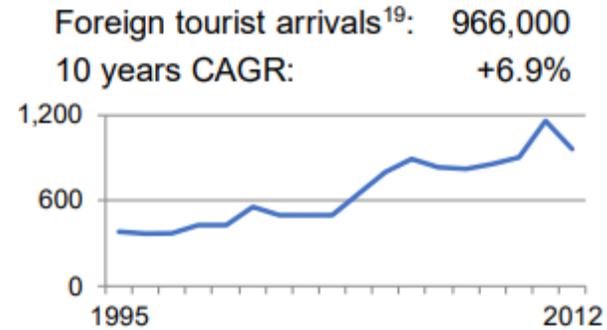
**Mongolia**



**Uzbekistan**



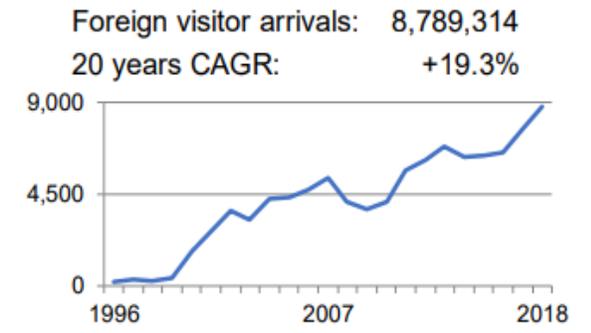
**Georgia**



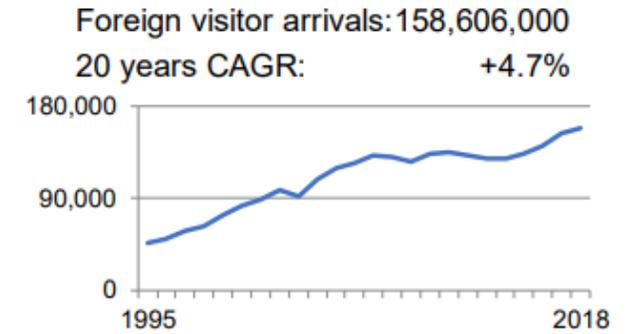
**Pakistan**



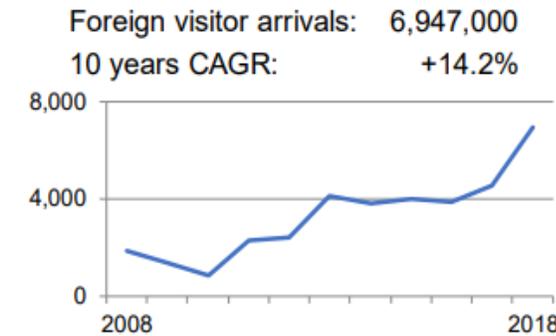
**Tajikistan**



**Kazakhstan**



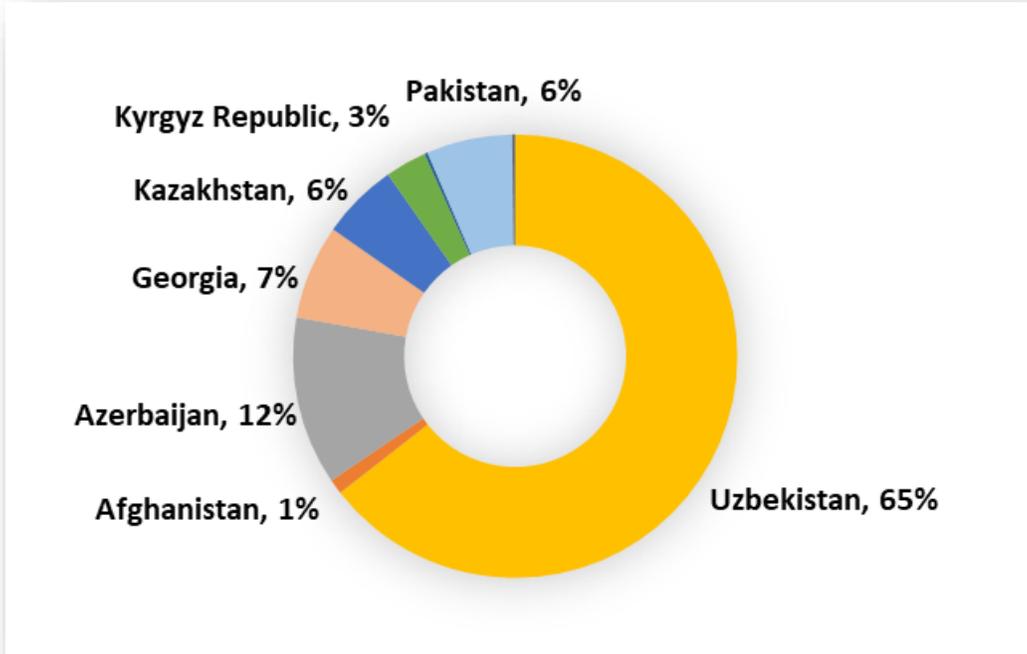
**China**



**Kyrgyz Republic**

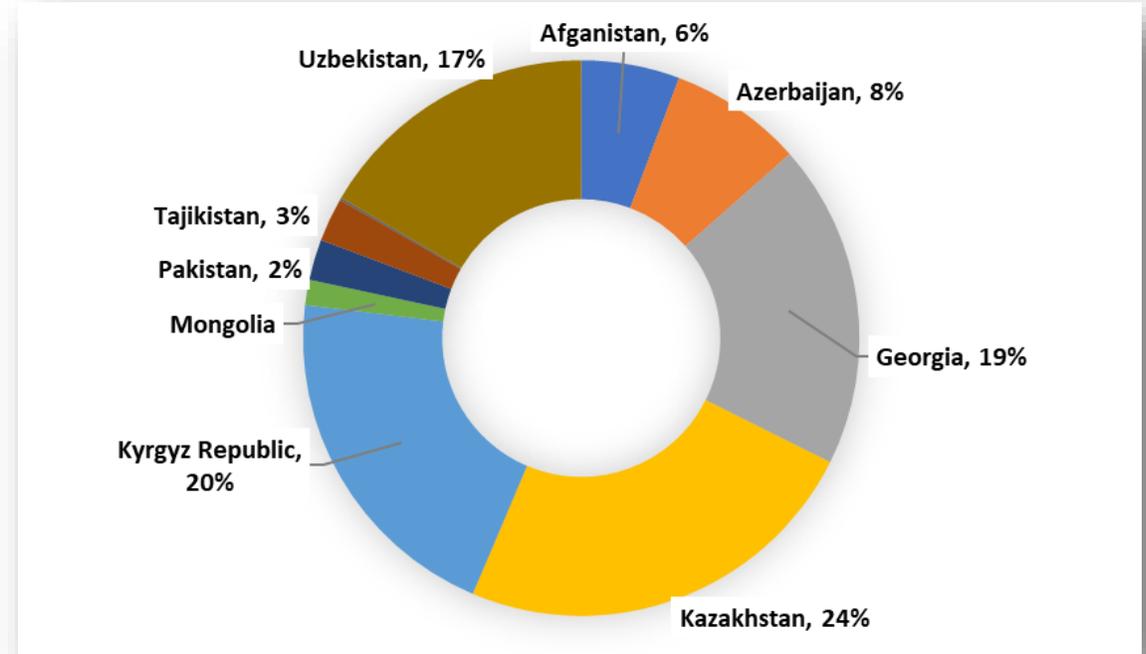
# Tourist Distribution

## Distribution of Domestic Tourists (2019)



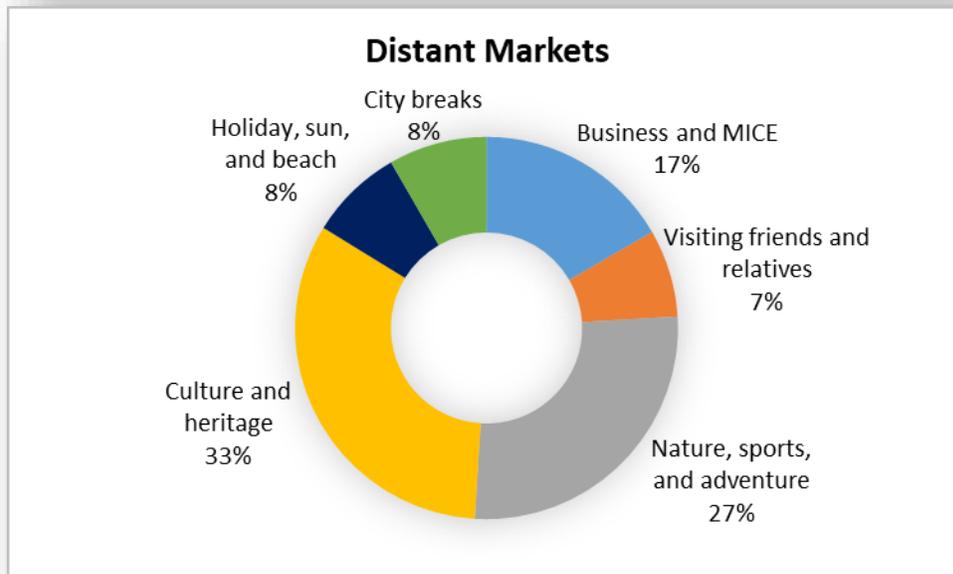
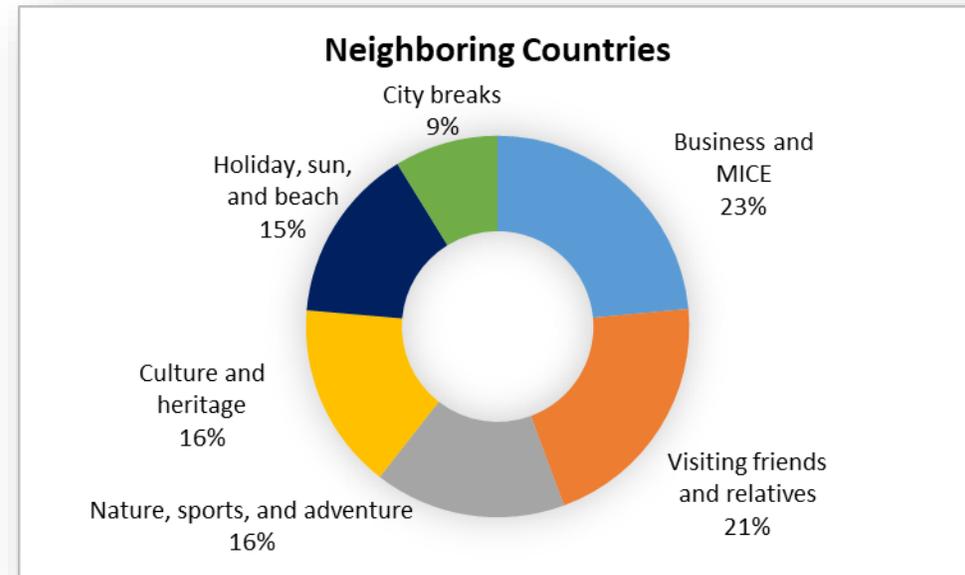
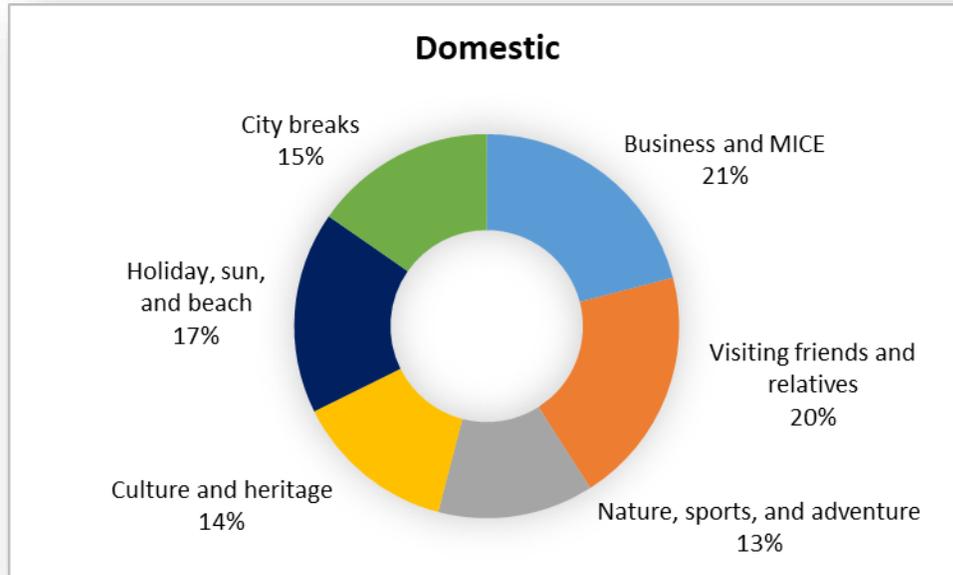
Uzbekistan accounts for the highest percentage of domestic travel with more than 65% of all domestic tourists. Of the remaining countries, Azerbaijan, Georgia and Kazakhstan have a significant share.

## Distribution of International Tourists (2019)



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

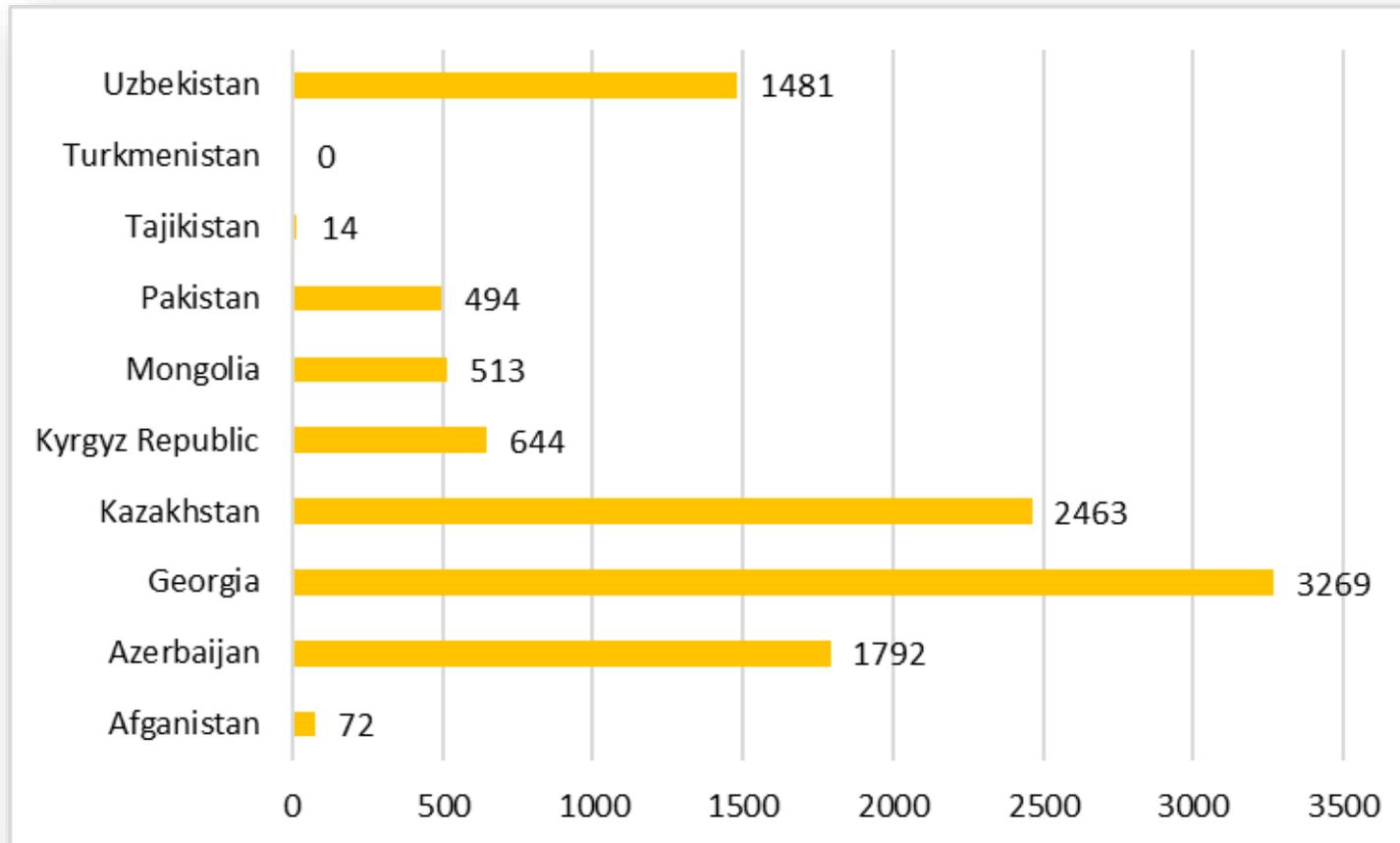
# Travel Motivation



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 3<sup>rd</sup> 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	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

### Adventure Tourism

1.33

Trillion USD

Projected size of the  
adventure tourism  
market in 2023

32%

Growth Rate

Project annual  
growth rate  
between 2021-25

### Business Tourism

1.29

Trillion USD

Global business  
travel spending in  
2020

17.4%

Of Spending

Percentage of  
business travel  
spending in 2020

### Culture Tourism

4/10

Tourists

Choose their  
destinations based  
on cultural offerings

3.77

Billion USD

Projected growth of  
cultural tourism  
between 2021-25

### City Tourism

56.1%

Urban Population

Percentage of the  
worlds population  
residing in cities

1-3

Days

Average length of  
stay per city by  
tourists

# Tourist Sites Theme



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

# Priority Tourism Clusters

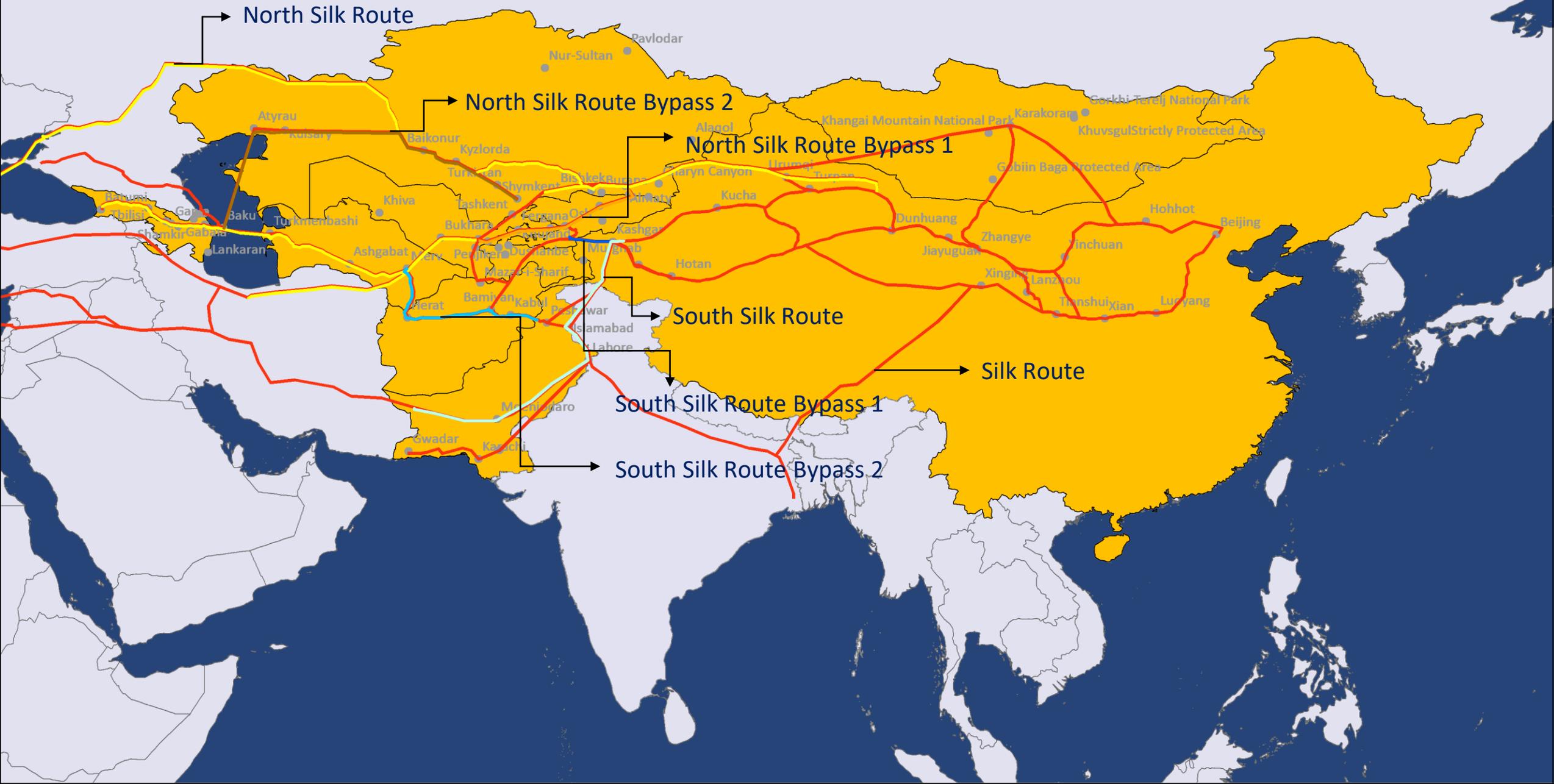


-  Health and Wellness
-  Sun and Beach
-  Culture and Heritage
-  Nature and Adventure
-  MICE

# 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%)
- Portugues Central: 72,357 (20.81%)
- Portugues 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

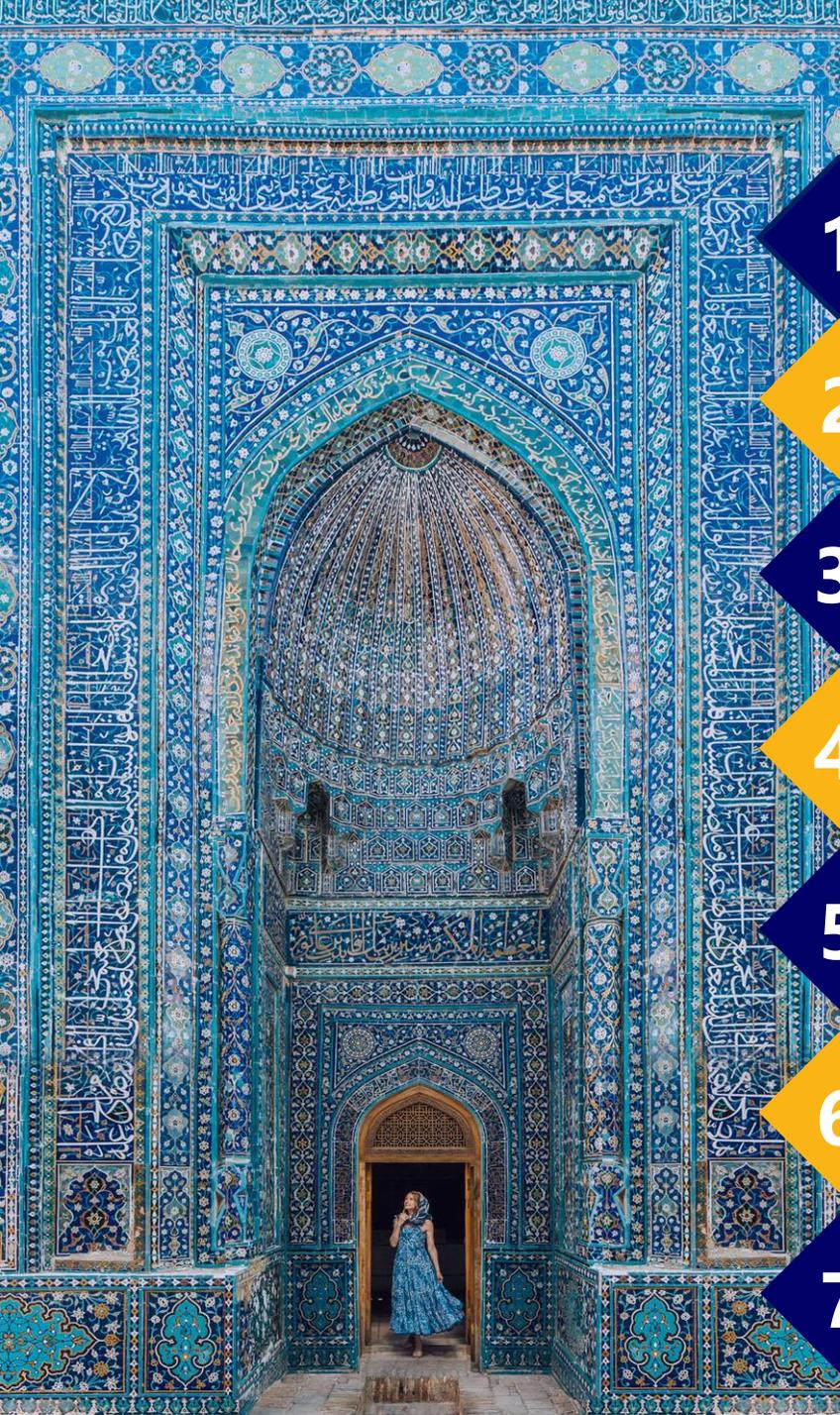
**165**  
Days

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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