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**COMCEC COORDINATION OFFICE**  
**August 2018**





**Standing Committee  
for Economic and Commercial Cooperation  
of the Organization of Islamic Cooperation (COMCEC)**

# **COMCEC TOURISM OUTLOOK 2018**

**COMCEC COORDINATION OFFICE  
August 2018**



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## **Preface**

The COMCEC Strategy, adopted during the 4th Extraordinary Islamic Summit held in Makkah Al-Mukarramah on 14-15 August 2012, envisages Working Group Meetings as one of the main instruments for its implementation. Through the Working Groups, country experts get the chance of elaborating the issues thoroughly in the respective cooperation areas and sharing their good practices and experience. The Working Groups are established for each cooperation area defined by the Strategy, namely Trade, Transport and Communication, Tourism, Agriculture, Poverty Alleviation, and Finance.

The COMCEC Outlooks are prepared in each cooperation area of the Strategy with a view to exploring the global trends and current situation in the OIC Member Countries in the respective area and enriching the discussions during the Working Groups Meetings by providing up-to-date data.

The COMCEC Tourism Outlook 2018 is prepared by Dr. Gurel CETIN, consultant at the COMCEC Coordination Office, with the objective of providing general information on the status of tourism in the Member States. It dwells on the major issues with regards to tourism sector development in the light of international tourism trends, provides insights on the current status of the OIC Member States and makes comparative analyses with the different country groupings to demonstrate the situation in the Member States and thus the cooperation potential.

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## Introduction

Tourism industry has experienced continued expansion and diversification, becoming one of the most rapidly developing industries in the world. Transformed from an activity of privileged travelers only some decades ago, tourism today enables more than one billion people to move across international borders each year. Globalization of goods and services, increased leisure time, the technological and transport revolutions, relaxation in visa procedures, and rising middle class have positioned tourism as a major growth tool. Because of the geographical expansion, competition between the tourist-receiving countries has been intensifying to obtain the highest share from the expanding international tourism market as a result of the enhanced transportation facilities and additional income allocated to travel expenses, in line with the improving welfare.

Tourism has continued to be a critical sector in both advanced and developing economies for economic development, poverty alleviation and sustaining employment. Growth of the tourism industry also contributes to employment, raises national income, and support balance of payments. In this regard, tourism sector is an important driver of growth and prosperity and can play a leading role in reducing poverty particularly in developing countries and the Least Developed Countries (LDCs).

As a trade in services category, tourism ranks fourth after fuels, chemicals and food products. As a major source of foreign exchange and investment, tourism also creates much needed employment and investment opportunities. Tourism's unparalleled cross-cutting nature and multiple links to the other economic sectors, further positions it as an efficient multiplier in global development strategies. Hence, there is a substantial emphasis on developing and facilitating the tourism industry within the Organization of Islamic Cooperation (OIC). COMCEC Economic Summit held in 2009 has defined the tourism as one of the three priority sectors together with agriculture and transportation. In addition to this, tourism sector is identified by the COMCEC Strategy as one of the six cooperation areas (among trade, transportation, agriculture, poverty alleviation, and finance).

This 2018 Outlook aims to provide a brief account of the situation in the OIC Member Countries. In this respect, the major issues with regards to development of tourism industry in the light of international tourism trends, the current situation in the member countries and some comparisons regarding competitiveness of the OIC Member States were analyzed.

## The Importance of Tourism for Development

A strong tourism sector contributes in many ways to development and the economy. It makes both direct contributions, by raising the national income and improving the balance of payments, and indirect contributions, via its multiplier effect and by providing the basis for connecting countries, through hard and soft infrastructure attributes that are also critical for a country's general economic competitiveness, international trade and foreign direct investment. Over the past decades, many new destinations have emerged, challenging the traditional ones in Europe and North America. For many developing countries, tourism is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development. The main positive economic impacts of tourism relate to foreign exchange earnings, contributions to government revenues, generation of employment and investment opportunities. Local recruitment and business opportunities in tourism help reduce rural-urban migration. While fostering gender equality, entry level jobs in tourism require less skilled workforce and this also enhances recruitment opportunities among younger generations.

Based on the information from countries with data available, the World Travel & Tourism Council (WTTC) estimated that travel & tourism's contribution directly to worldwide gross domestic product (GDP) was 3.2 % in 2017 and is expected to rise by 4% in 2018. The forecasted growth of tourism's contribution to GDP is around 3.8% on the average for the next ten years. This is much faster than the growth in global economy which was around 3.2% in 2017. With direct and indirect effects of more than 185 supply-side economic activities that have significant connections to tourism, its total contribution to GDP is calculated as 10.4%, a total of US\$8.3 trillion, and is expected to grow by 4 to US\$8.6 trillion in 2018. It is also estimated that travel and tourism sector have attracted capital investment of US\$882 billion in 2017 (WTTC, 2018a). Tourism provided 118 million direct (3.8% of total employment) and 195 million indirect and induced jobs with a total of 313 million (9.9% of total employment) jobs in 2017 and direct contribution to employment is expected to rise by 2.4% in 2018. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment industries, banking & finance, promotion and publicity services; tourism's contribution to employment tends to be much higher. In 2017, nearly 313 million jobs were supported in tourism related industries (WTTC, 2018a). Tourism's contribution is estimated as 9.9% of the overall number of jobs or one in 10 jobs globally (UNWTO, 2018a). According to the WTTC, travel & tourism will support 414 million jobs which indicates 11.6% of total employment by 2028 (WTTC, 2018a).

**Figure 0.1 Why Tourism Matters?**



Source: UNWTO, Tourism Highlights 2016 Edition.

According to the UNWTO, total exports earnings generated by international tourism in 2016 reached US\$ 1.4 trillion or US\$ 4 billion a day on average. International tourism represents 7%

of the world's exports in goods and services, up from 6% in 2015, as tourism has grown faster than world trade over the past four years. Tourism exports account for as much as 30% of the world's exports of commercial services. Globally, tourism ranks third after fuels and chemicals and ahead of food and automotive products as an export category. However, in many emerging economies, tourism is the largest export category. While tourism represents 30% of services exports globally, the industry has 40% share in emerging economies' services exports (UNWTO, 2017a). Tourism is also important for export diversification; particularly for commodity and oil exporting countries tourism has the potential to offset weaker export revenues.

In over 150 countries, tourism is one of the top five foreign exchange earners and in 60 countries it is the number one source of foreign currency income. In 23 of the 49 Least Developed Countries, international tourism is among the top three foreign exchange earners, and for 7 LDCs, it is their single largest revenue earner (UNWTO, 2012b).

It is acknowledged that tourism contributes in alleviating poverty and empowering women, youth and migrant workers and provides new employment opportunities. There are three main pathways through which tourism affects poverty reduction. Firstly, the wages and earnings of workers or entrepreneurs who participate in the sector can be regarded as direct effects of tourism. Tourism is more labor intensive than other sectors, and uses a relatively high proportion of unskilled or semi-skilled labor. For advanced, diversified economies, the contribution of tourism to GDP ranges from approximately 2% for countries where tourism is a comparatively small sector, to over 10% for countries where tourism is an important sector of the economy. For small islands and developing countries, the weight of tourism can be even larger, accounting for up to 25% in some destinations like in some Member Countries as Maldives. Secondly, indirect effects occur through the tourism value chain which includes inputs like food and beverage, construction, transportation, furniture and many other sectors. Evidence suggests that in developing countries, the inter-sectoral impact adds an extra 60-70 % on top of the direct effects of tourism. Finally, dynamic effects of tourism occur on the livelihood strategies of local households, the business climate for small enterprise growth or infrastructure development in countries. Moreover, tourism tends to employ more women and young people than other industries and enhance their economic welfare (Ashley, et al., 2007).

A cross country study by the IMF showed that an increase of one standard deviation in tourism activity would lead to an additional annual growth of about 0.5 percentage point per year, *ceteris paribus* (everything else being constant) (IMF, 2009). Thus, particularly low income economies should view investing in its tourism industry as a means to stimulate growth over the long term and enabling the poor to share in economic gains.

## Overview of International Tourism in the World

### Key Tourism Trends in the World

The last six decades have witnessed extraordinary growth in international tourism volume. In spite of the multiple challenges and shocks –from human induced crises, to natural disasters; tourism, although affected, has always bounced back, proving its resilience and capacity to recover. During the next two decades tourism is expected to sustain its growth. International tourist arrivals are estimated to increase on average by 43 million annually between 2010 and 2030 (Tourism Towards 2030, 2012).

The share of emerging economies in the international tourism market is increasing. This increase will be slightly higher than the rate achieved in the period 1995-2010. For the decade 2010-2020, increases will be more moderate in the first years and pick up in the middle of the period, and they will gradually slowdown. Over time, the rate of growth is expected to decrease gradually, from 3.7% in 2014 to 2.5% in 2030. This is the result of a combination of four factors (Tourism Towards 2030, 2012):

- The base volumes are higher, so smaller increases still add substantial numbers;
- Lower GDP growth, as economies mature;
- A lower elasticity of travel to GDP;
- Increasing transport costs.

Future arrivals will be spread wider across the globe and travel between regions will continue to grow slightly faster than travel within the same region. The share of emerging economies in the international tourism will surpass the share of advanced ones. Many of the new arrivals will be to destinations in Asia, Latin America, Central and Eastern Europe, Africa and the Middle East. The future brings enormous opportunities for tourism to take a central role in the political and economic agenda, seeking recognition for its contribution to economic growth and development. It also brings added challenges and responsibilities for tourism sector to take the lead in mitigating its potential negative impacts on host communities and the environment (Tourism Towards 2030, 2012).

Over the past six decades tourism has experienced a continued growth not only in traditional destinations in Europe and North America but also in other parts of the world. According to Tourism Towards 2030; by 2030, 58% of international arrivals will be recorded in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa. Asia and the Pacific will gain most of the new arrivals. South Asia will be the sub-region with the fastest growth in international arrivals. North-East Asia will be the most visited sub-region by 2030. With the advancements in aviation technology and open skies agreements; air transport industry has substantially reduced travel time and travel costs for long haul travel (Cetin et al., 2016). Air transport will continue to increase its market share, but at a much slower pace. The cost of air transport will cease declining, and is expected to grow at an average annual rate of 1.1% per year from 2010 to 2030 (Tourism Towards 2030, 2012).

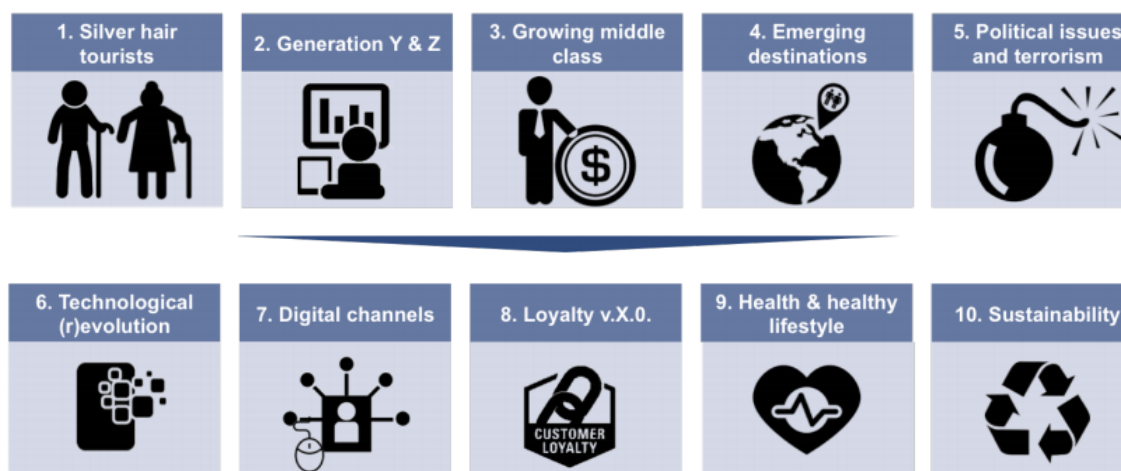
Conclusions with respect to the consumer profile and the trends of the next 20 years reached by assessing results of various studies conducted by the World Tourism Organization can be summed up as follows:

- Long-haul travel and overseas travel will increase and new destinations in relevant regions will gain importance.
- Electronic media (interactive maps, Internet, web sites, etc.) will be increasingly more important for choosing destinations and making reservations.
- In line with the increasing education and welfare level of individuals, the number of experienced traveler groups will increase.
- Preferences of tourists will become diverse and demand for innovation and variety will rise; the emphasis will be on comfort and adventure. For product development, 3S (i.e., sun-sand-sea) will be replaced by 3E (i.e., excitement-education-entertainment).
- In parallel with an increase in average human life expectancy, retirement period will be longer and people will have more time for vacation.
- Singles, and couples without children, and 65+ ("the third age") groups are anticipated to constitute the larger percentage of the world population with more resource allocated to travel and entertainment. By the year 2030, the fastest increases are in those 65 and older group, which will see a jump in developing countries by 140 percent. By 2040, the global population is projected to reach 1.3 billion and older people accounting for 14 percent of the total (Hammond, 2011).
- Average working time will decrease and people will have more time for vacation.
- Consumers will be informed and protected within the framework of universal systems, and the influence of campaigns addressed to consumers for a sustainable and balanced development of tourism will be stronger.

Horwart HTL (2015) has also identified 10 global trends which will influence mid- and long-term tourism development. Among these, first five of trends will have a major influence on demand in the tourism sector but will also impact the second set of trends, which concerns changing supply. Together, they represent forces which will shape the future of tourism.

According to this report, global population is aging and as a result *silver hair tourists'* segment is emerging -- with specific desires and needs in terms of customization, service consumption, security and desired products. The share of world's population over the age of 60 increased from 8% in 1950 to 17% in 2017. According to forecasts, this segment's share will reach 22% by 2050. Silver hair tourists are an important tourist segment and are expected to spend more than all other age groups on travels with a satisfactory disposable income, less home responsibilities and empty nests, more time to travel and relatively good health. They require tailor-made services and prefer to build trust through face-to-face interaction with providers. They also have different preferences and interests, expectations and needs, and their focus is often based on special interest. Health and wellness travel is popular among silver hair tourists (Horwart HTL, 2015; UN, 2017).

**Figure 0.1 Tourism Megatrends**



**Source:** Horwath HTL, 2015

In addition to aging population, generation Y (also known as Millennials) and generation Z, (known as iGen) are also an important market for tourism sector. These generations are technology driven age groups. Among these, millennials are expected to represent 50% of all travelers by 2025 and before that the entire tourism value chain is being adjusted to meet their lifestyle requirements. To meet their needs, tourism services will be more transparent and tech savvy, with a strong focus on empathy and customer connection. On the other hand, generation Z is believed to be totally different from generation Y in so much as they already have higher access to information, a more dynamic lifestyle, and a higher level of education, an accelerated adoption of change and faster spending (Horwart HTL,2015).

The increase in average income and the fall in levels of absolute poverty are resulting in a growing middle class. It is expected that the middle class will increase from 1.8 billion in 2009 to 3.2 billion by 2020 and 4.9 billion by 2030. Most of this growth is expected from Asia-Pacific and this segment's characteristics and needs will have a growing importance and impact on the tourism products and services (Horwart HTL,2015).

The weight of emerging destinations in the international tourism market is increasing. According to UNWTO; by 2030, 58% of international arrivals will be to the emerging destinations.

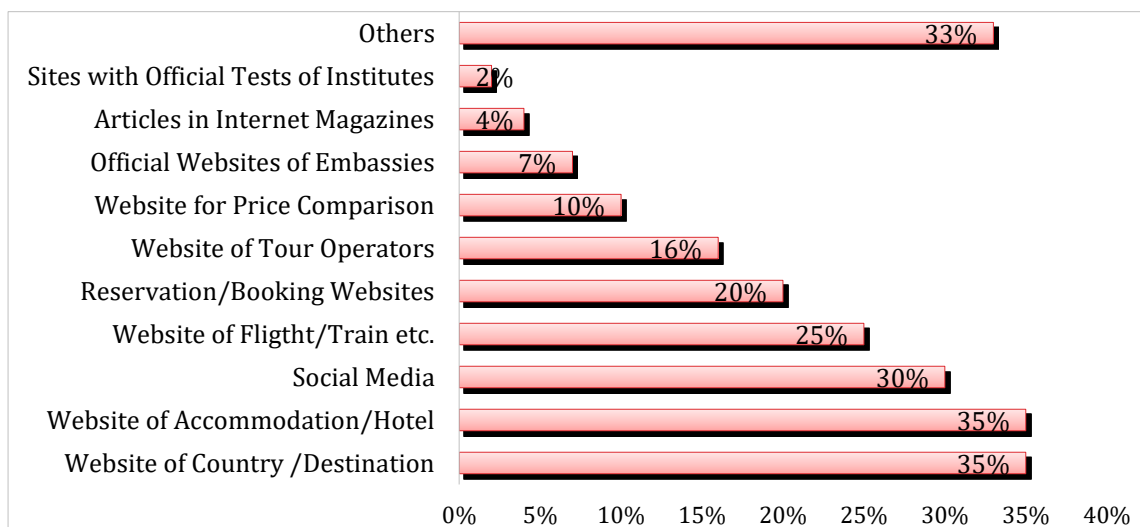
Governments around the world are facing numerous political, social, economic and environmental issues that might influence tourism destinations. Political tensions, terrorism and civil riots impose a threat to the future of tourism in any destination. According to a research by WTTC, the impact of these crises on tourism and the length of time needed to return to previous levels differ widely depending on the type of crisis and other diverse factors. Whether tourists are directly targeted or affected, which locations are involved, the extent of infrastructural damage, the time of the year, as well as the scale and tone of media coverage are the factors that affect the scale of their impact on tourism. In contrast to popular opinion, terrorism does not have the most enduring impact, however political turmoil has a much more gradual impact, often lasts for a long time and is difficult to judge when it is over. To be



successful, it is clear that crisis management strategies and tools are becoming a necessity for all tourism stakeholders. Five-point crisis communications plan should cover clear information, consistency, openness and accessibility and sympathy for victims. Governments and authorities should also ensure clear and effective communications (ITB, 2015).

Among supply side trends, tourism is strongly influenced by the progress of the technological revolution. The Internet has already changed the way tourists search, book and experience their travel. The whole industry has to adopt new technology trends and reshape the way they provide services. 75% of international travelers use online information sources to plan their trip. As displayed on figure 3.2 around 30% of these 'online' international travelers actively use social media when researching about their trip (ITB, 2015) besides the official web sites of destinations and service providers.

**Figure 0.2 Internet Information Sources**



**Source:** ITB World Travel Trends Report 2015-2016

International travelers focus on the most relevant social media for travel information rather than the biggest social media platforms. Review sites, travel blogs and travel forums are used much more intensively than generic social networks.

Loyalty within tourism sector is expected to decline in future. There will be less complicated sign-up forms. Physical loyalty cards and loyalty programs now have to be integrated into the tourist experience. These programs are expected to customize tourist services rather than offering only discounts and upgrades.

Health and healthy lifestyle will become increasingly important in tourists' decision making and tourism sector will offer products and services according to traveler's health and healthy lifestyle needs.

The sharing economy has shown incremental growth in recent years and is forecast to reach USD 335 billion by 2025, according to projections by PricewaterhouseCoopers. Tourism is one of the sectors that much of this growth occurred, as the fast paced growth of peer-to-peer and

shared usage platforms is changing the tourism marketplace and giving people new options for where to stay, what to do and how to get around. Sharing economy platforms have adopted different business models, some of which closely resemble traditional tourism activities, while others appeal to users' sense of community (OECD, 2016).

This rapid growth of the sharing economy is placing pressure on existing tourism policy frameworks. This requires a balanced, informed approach, which considers all interests. Tourist protection, safety and quality assurance frameworks are important factors to translate to the sharing economy model. Taxing and regulation of sharing economy and impact on residents are other challenges to be dealt by legislative bodies. Governments should make sure that they capture the opportunity to stimulate innovation and support the development of tourism, while addressing the challenges it poses for the traditional tourism sector and the impacts on society (OECD, 2016).

Governments are recommended to modernize policy and regulatory approaches, re-think policy incentives, better understand the policy environment and test new approaches, utilize the data, strengthen data collection and research on the impacts of the sharing economy on tourism and local communities (OECD, 2016). Increased local planning, management and marketing of destination and regional leadership and institutionalization in tourism through DMOs at destination level also emerge as a necessity (Edgell, 2015).

Economic, social and environmental costs and benefits have to be balanced in order to ensure the long-term sustainable development of tourism. Sustainable tourism development requires the participation of all relevant stakeholders at the destination level including and engaging particularly the locals.

### **International Tourist Arrivals**

According to the UNWTO (2018a), international tourist arrivals grew by 7% in 2017, and reached 1.322 million tourists. Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 529 million in 1995 and 1.322 million in 2017 (UNWTO, 2018a). 2017 was the eighth consecutive year of above-average growth (more than 4%) in international tourism following the 2009 global economic crisis. Despite ongoing geopolitical, economic and environmental challenges in various regions of the world, demand continued to be strong in most of the destinations.

Tourism flows were influenced by three major factors in 2016 and 2017. These were fluctuations in exchange rates, decline in the price of oil and other commodities which increased disposable income in importing countries but weakened demand in exporting countries and increased global concern about safety and security in some destinations (UNWTO, 2017a).

The strong momentum in growth is expected to continue in 2018 based on 2017 and is expected to be 4-5%, above the UNWTO's long term projections (for 2030: +3.8% a year on average between 2010 and 2020). International tourist arrivals already grew by 6% between January and April 2018, compared to same period of last year. UNWTO forecasts international tourist arrivals to increase by 4% to 5% over the full year 2018 (UNWTO, 2018a). Arrivals to Europe and Americas are both expected to rise by 3,5-4,5%, Asia and the Pacific by 5-6%, Africa by 5-7% and Middle East by 4-6% in 2018.

**Table 0.1 International Tourism Arrivals and Tourism Receipts**

	2000	2005	2010	2015	2016	2017
Number of tourists (millions of people)	674	809	953	1.189	1.235	1.322
Annual change (percent)	8,1	5,9	6,5	4,5	3,9	7
Tourism receipts (billion dollars)	495	701	961	1.196	1220	1332
Annual change (percent)	-	-	11,7	-4,5	2.0	5

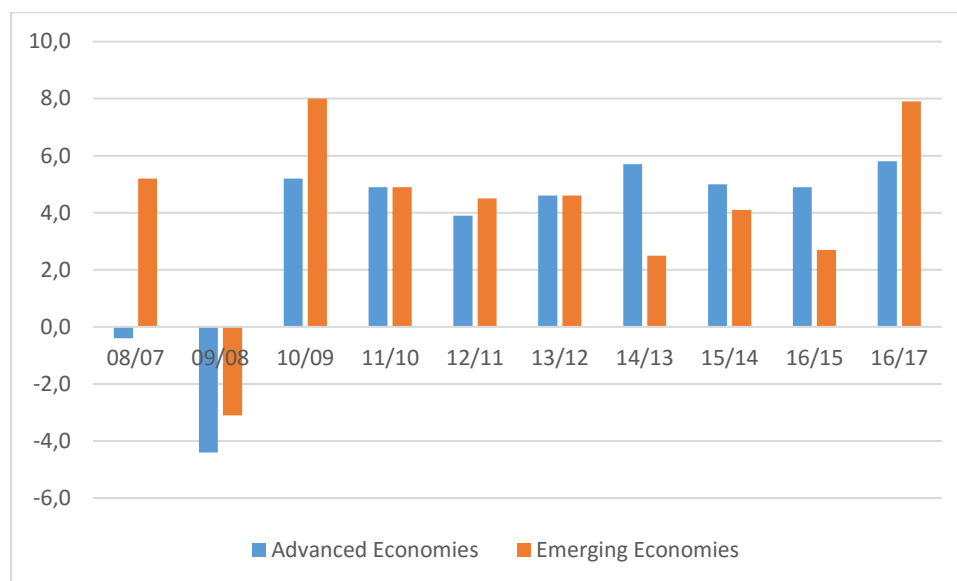
**Source:** World Tourism Organization

International tourism market has become characterized by wide geographical distribution and continuous diversification of destinations. New destinations have been emerging in the developing regions of Asia-Pacific, the Middle East and Africa and this rapid expansion of new markets has increased the competition in the tourism sector.

While many destinations recorded an overall growth, results are more mixed than usual across destinations. According to the UNWTO, growth rate in advanced economies (+5.8%) were below the advanced economies (+7.9%), with Africa (+9%) showing the strongest results in 2017. In 2017, international tourist arrivals to advanced economies were 725 million, while it was 597 million for emerging economies.

Results across emerging economy destinations were uneven in a context of lower commodity prices and weaker economic growth. In 2017, the economic scenario remained comparatively volatile with growth gradually picking up in advanced economies contrasting with a slowdown in emerging ones.

As displayed on Figure 3.3, the growth of international tourist arrivals in emerging economies is greater than advanced economies for the years 2007-2012. However, since 2013, advanced economy destinations showed relatively faster growth in tourist arrivals than emerging economy destinations up until 2017. In 2017 emerging destinations performed well with a 8% growth, while advanced economy destinations grew by 6%.

**Figure 0.3 Change in International Tourist Arrivals (%)**


Source: World Tourism Organization, Tourism Barometer 2017 July & Tourism Highlights 2017

In terms of regions, the UNWTO reports that Africa (+9%) was the best performer in 2017 and the number of international tourists grew by 5 million to reach 63 million in this region. Growing purchasing power, relative safety, increased air connectivity, more affordable travel and visa relaxation arrangements were major reasons of the growth.

**Table 0.2 International Tourism Arrivals by Region (Millions)**

Tourist Arrivals	2000	2010	2015	2016	2017	Share (%)
<b>World</b>	<b>674</b>	<b>949</b>	<b>1.186</b>	<b>1.235</b>	<b>1.323</b>	<b>100</b>
<b>Europe</b>	386.4	488.7	607.6	616	671	51
<b>Asia&amp;Pacific</b>	110.3	205.4	279.2	308	323	24
<b>Americas</b>	128.2	150.1	192.6	200	207	16
<b>Africa</b>	26.2	49.7	53.5	58	63	5
<b>Middle East</b>	22.4	54.8	53.3	54	58	4

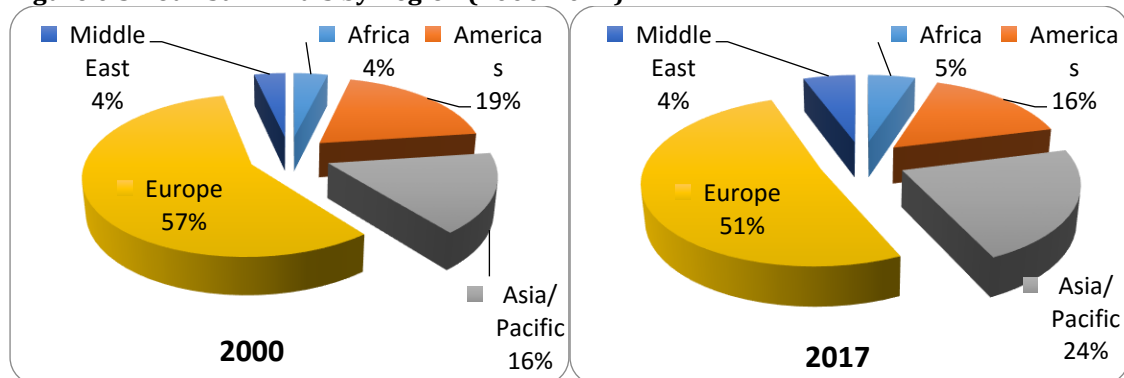
Source: World Tourism Organization, 2018a

According to the Table 3.2, **Europe** (+2%), **Asia and the Pacific** (+9%), **the Americas** (+3%), **Africa** (+8) showed continued growth in 2016 except **Africa** (-4%).

In 2017, Europe (+8%) hosted more than half of the international tourists (671 million). This is an increase of 52 million from 2016. Asia and the Pacific recorded 15 million more international tourist arrivals compared to 2016 to reach 323 million. International tourist arrivals in the Americas grew 7 million to reach 207 million. Limited data available for Africa points to an estimated 9% increase corresponding to 5 million more arrivals which confirms a strong recovery partly due to simpler visa procedures, air and sea connectivity and strengthening security.

To analyze the tourism trends in these regions, it would be useful to compare the results of the last decade. The figure below compares the shares of tourist arrivals by regions for the years 2000 and 2017.

**Figure 0.3 Tourist Arrivals by Region (2000-2017)**



Source: UNWTO, 2016

The figure demonstrates that there is a tendency of increase in tourist arrivals in Asia-Pacific Region and decrease in Europe and Americas Region.

According to Tourism Towards 2030, UNWTO's long-term outlook and assessment of future tourism trends, the number of international tourist arrivals is expected to increase by 3.3% a year on average from 2010 to 2030. This represents some 43 million more international tourist arrivals every year, reaching a total of 1.4 billion arrivals by 2020, 1.5 billion arrivals by 2023 and 1.8 billion by 2030.

International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4 percent a year) of advanced-economy destinations (2.2 percent a year). Emerging economies' annual growth rate is 4,5% while arrivals to advanced economies only grew by 3,5%. The market share of emerging economies increased from 30% in 1980 to 45% in 2017, and is expected to reach 58% by 2030, equivalent to over 1 billion international tourists.

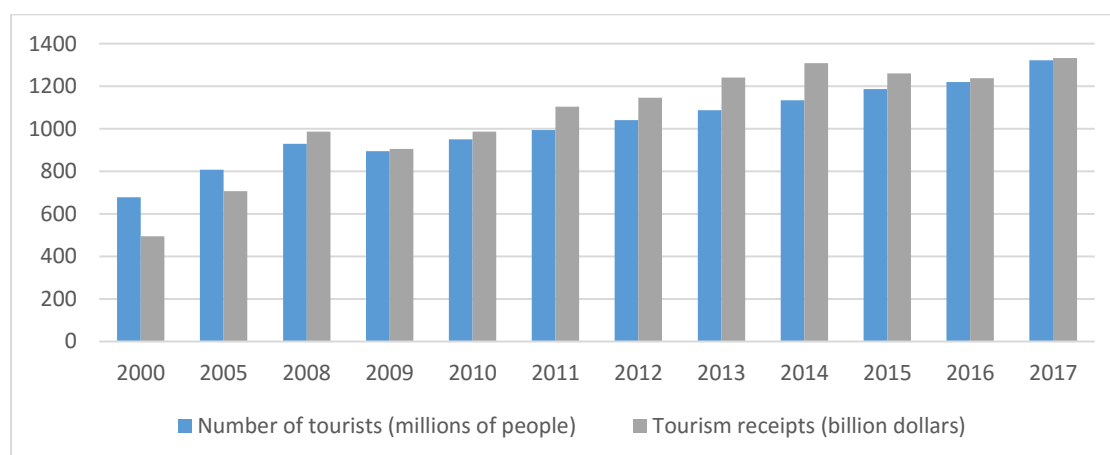
### International Tourism Receipts

As an internationally traded service, inbound tourism has become one of the world's major trade categories. International tourism accounts for 30% of the world's export of services and 7% of overall exports of goods and services. Tourism has been growing faster than global trade for the past several years. International tourism receipts are the earnings generated in receiving countries from expenditures of international visitors on accommodation, food and drink, local transport, entertainment, shopping and other services and goods. For the receiving country receipts count as exports and for many destinations tourism is a vital source of foreign currency earnings and an important contributor to the economy, creating much needed employment and opportunities for development. From the period 1980 to 2017, international tourism receipts increased from US\$ 104 billion in 1980 to US\$ 1,332 billion in 2017 (UNWTO, 2018a). Average spending per arrival was also a little bit above 1000 US\$.

Figure 3.5 shows the international tourism receipts as well as tourist arrivals for the period 2005-2017. International tourism receipts grew by 5 % in real terms (i.e. using local currencies at constant prices in order to adjust for inflation and exchange rate fluctuations) in 2017 by reaching to US\$ 1,332 billion. The strong exchange rate fluctuations in 2016 and 2017 significantly influenced receipts for individual destinations and regions expressed in current US dollars. In absolute terms, international tourism receipts in destinations around the world decreased by US\$ 94 billion compared to 2016. 64 of 112 destinations saw which have observed an increase 64 recorded double digits.

In addition to receipts earned in the destinations (the travel item of the balance of payments), international tourism also generated US\$ 216 billion in exports through international passenger transport services rendered to non-residents in 2016. As such, total receipts from international tourism, including international passenger transport, might be expected to exceed US\$ 1.5 trillion in 2017 resulting a contribution of US\$ 4 billion a day to global export earnings.

**Figure 0.4 International Arrivals & Tourism Receipts (2005-2017)**



Source: UNWTO, 2018a

Based on 2016 data, advanced economy destinations (+1.6%) recorded somewhat slower growth also in receipts than emerging economy destinations (+4.4%). By region, the largest increase in receipts for the Middle-East was recorded as +13% (in real terms) in 2017. It is followed by Africa and Europe by +8%, Asia & Pacific by +4% and Americas by 1%.

**Table 0.3 International Tourism Receipts by Region (Billion \$)**

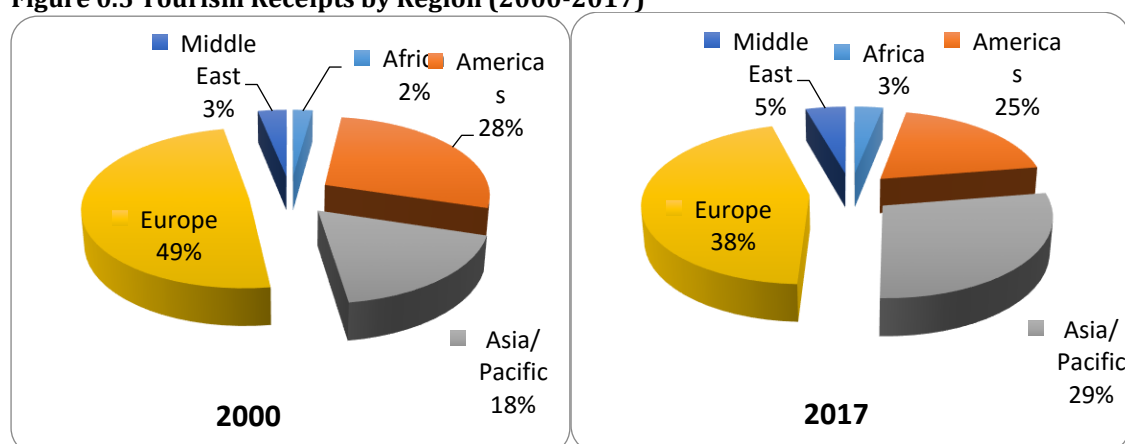
Tourism Receipts	2000	2015	2016	2017	Share (%)
<b>World</b>	<b>475</b>	<b>1,196</b>	<b>1,220</b>	<b>1,332</b>	<b>100</b>
<b>Europe</b>	234.5	449.6	447.3	511.6	38.4
<b>Asia &amp; Pacific</b>	86.7	349.4	366.7	389.5	29.2
<b>Americas</b>	132.8	305.6	313.2	325.7	24.5
<b>Africa</b>	10.8	32.8	34.8	37.8	2.8

<b>Middle East</b>	<b>12.7</b>	<b>58.2</b>	<b>57.6</b>	<b>67.8</b>	<b>5.1</b>
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Source: UNWTO, Tourism Highlights 2002&2013&2017&2018 Edition

In Europe, international tourism receipts grew by 1% in real terms to US\$ 511 billion, representing 38% of worldwide receipts. Individual destinations had mixed results for 2016 while Iceland, Norway, Ireland, Georgia, Slovakia, Bulgaria, Romania, Lithuania, Portugal, Spain, Cyprus and Malta reported double digit growth some important destinations such as Turkey, France and Belgium recorded declines, because of terrorist attacks and security concerns. The preliminary data on 2017 and 2018 shows stronger growth indicators globally as shown in table 3.3.

**Figure 0.5 Tourism Receipts by Region (2000-2017)**



Source: UNWTO, Tourism Highlights 2013 & 2017 Edition

Accounting for 29% of international receipts, in 2017, Asia-Pacific region earned US\$ 390 billion in international tourism receipts, this means an increase of 4% in real terms compared to 2016. According to the UNWTO (2018a); Americas, accounts for 25% of international tourism receipts worldwide, and increased its tourism receipts by 1% in real terms to US\$313 billion.

Based on 2017 data, parallel to its growth in arrivals Africa experienced a strong rebound in receipts as well. Receiving 38 billion USD in 2017 the region enjoyed an increase of 8% in real terms compared to 2016.

International tourism receipts in Middle East grew by almost 13% to 68 billion US\$ in 2017. Strong recovery of Egypt and robust results in other major destinations lead to larger growth rates.

## International Tourism in the OIC Member Countries

In the light of the above mentioned overview of the trends in international tourism, this section aims to assess the performance and economic role of the international tourism in the Member Countries.

The OIC Member Countries are located in four continents on all over the world. Besides their geographical heterogeneity, the Member Countries do not constitute a homogenous economic group due to their different development levels. Most of the Member Countries are developing countries and 21 of them are the Least Developed Countries (LDCs).

Given these conditions, it is expected that tourism might play an important role in economic field regarding particularly sustainable development and poverty alleviation in the Member Countries.

According to WTTC, the direct contribution of Travel & Tourism to GDP in 2017 was \$212.8 billion (3.3% of GDP) in the OIC member states. This is forecasted to rise by 4.5% in 2018. The direct contribution of Travel & Tourism to GDP is also expected to grow by 4.5% yearly to \$344.8 billion (3.4% of GDP) by 2028.

The total contribution of Travel & Tourism to Member States' GDP (including indirect and induced impacts) was USD561,5 bn in 2017 (8.7% of GDP) and is expected to grow by 4.3% in 2018 and rise by 4,7% pa to USD926.1 bn by 2028 (9.2% of GDP) (WTTC. 2016).

**Table 0.1 Estimates and Forecasts of Travel & Tourism Economic Impact in OIC Member States**

COMCEC	2017 \$ billion <sup>1</sup>	2017 % of total	2018 Growth <sup>2</sup>	2028 \$ billion <sup>1</sup>	2028 % of total	Growth <sup>3</sup>
<b>Direct contribution to GDP</b>	212.8	3.3	4.5	344.8	3.4	4.5
<b>Total contribution to GDP</b>	561.5	8.7	4.3	926.1	9.2	4.7
<b>Direct contribution to employment<sup>4</sup></b>	16.801	2.8	2.7	22.530	3.0	2.7
<b>Total contribution to employment<sup>4</sup></b>	42.982	7.3	2.6	57.588	7.7	2.7
<b>Leisure spending</b>	293.5	2.5	5.0	477.8	2.5	4.5
<b>Business spending</b>	93.2	0.8	3.2	152.5	0.8	4.7
<b>Capital investment</b>	104.4	6.3	3.9	183.0	7.1	5.4

<sup>1</sup>2017 constant prices and exchange rates; <sup>2</sup>2018 real growth adjusted for inflation (%); <sup>3</sup>annual real growth adjusted for inflation; <sup>4</sup>000 jobs

Source: WTTC, Economic Impact 2018 Report-OIC

Travel & Tourism in OIC generated 16,801,000 jobs directly in 2017 (2.8% of total employment) and this is forecast to grow by 2.7% in 2018. This includes employment by hotels, travel agents,



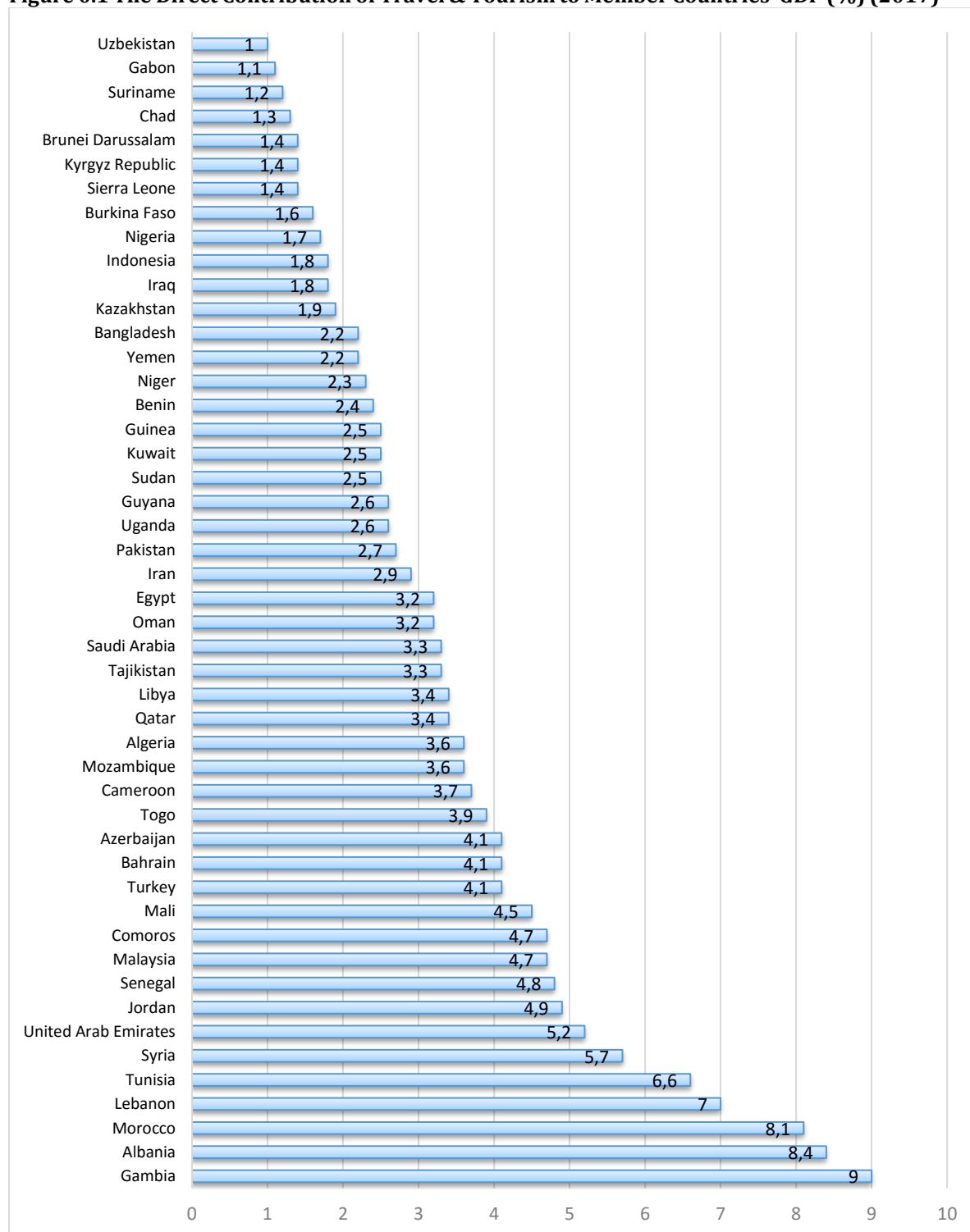
airlines and other passenger transportation services. It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists. By 2028, Travel & Tourism will account for 22,530,000 jobs directly, an increase of 3% pa over the next ten years. Total contribution of travel and tourism to employment in OIC member states is 42,982,500 jobs in 2017 (7.3% of total employment) (WTTC, 2018). Leisure spending (inbound and domestic) in OIC member states generated 76% of direct travel & tourism GDP in 2017.

In Figure 4.1, direct contribution of travel and tourism to GDP can be seen for 48 member countries in 2017. This figure expresses the importance of travel and tourism for economies of member states. Meanwhile, this figure excludes Maldives, since travel and tourism's direct contribution was 39.6% in Maldives which makes the figure inapprehensible to analyze. As one of the small island developing states, Maldives is the most tourism-dependent country which relies on tourism income. This dependence on tourism in particularly island countries would make them more vulnerable, as the tourism might be unstable, particularly sensitive to economic fluctuations in the tourists' countries of departure and to international political events.

Because of its multiplier impact many countries have embraced tourism as a tool to boost their economy. GDP contribution of travel and tourism is relatively high in countries like Albania (8.5%), Gambia (8.2%), and Morocco (8.2%). As the tourism sector is vulnerable to crises, these countries are particularly more sensitive to economic fluctuations and to international political events.

According to the WTTC data for the year 2017, countries with little reliance on tourism as part of GDP include Uzbekistan and Gabon, travel and tourism makes up about 1 percent of total GDP in each. These countries are less dependent on tourism industry in their economy. It is important to note that diversification in an economy is healthy, however if a country or region becomes dependent for its economic survival upon one industry, it can put major stress upon this industry as well as the actors involved to perform well.

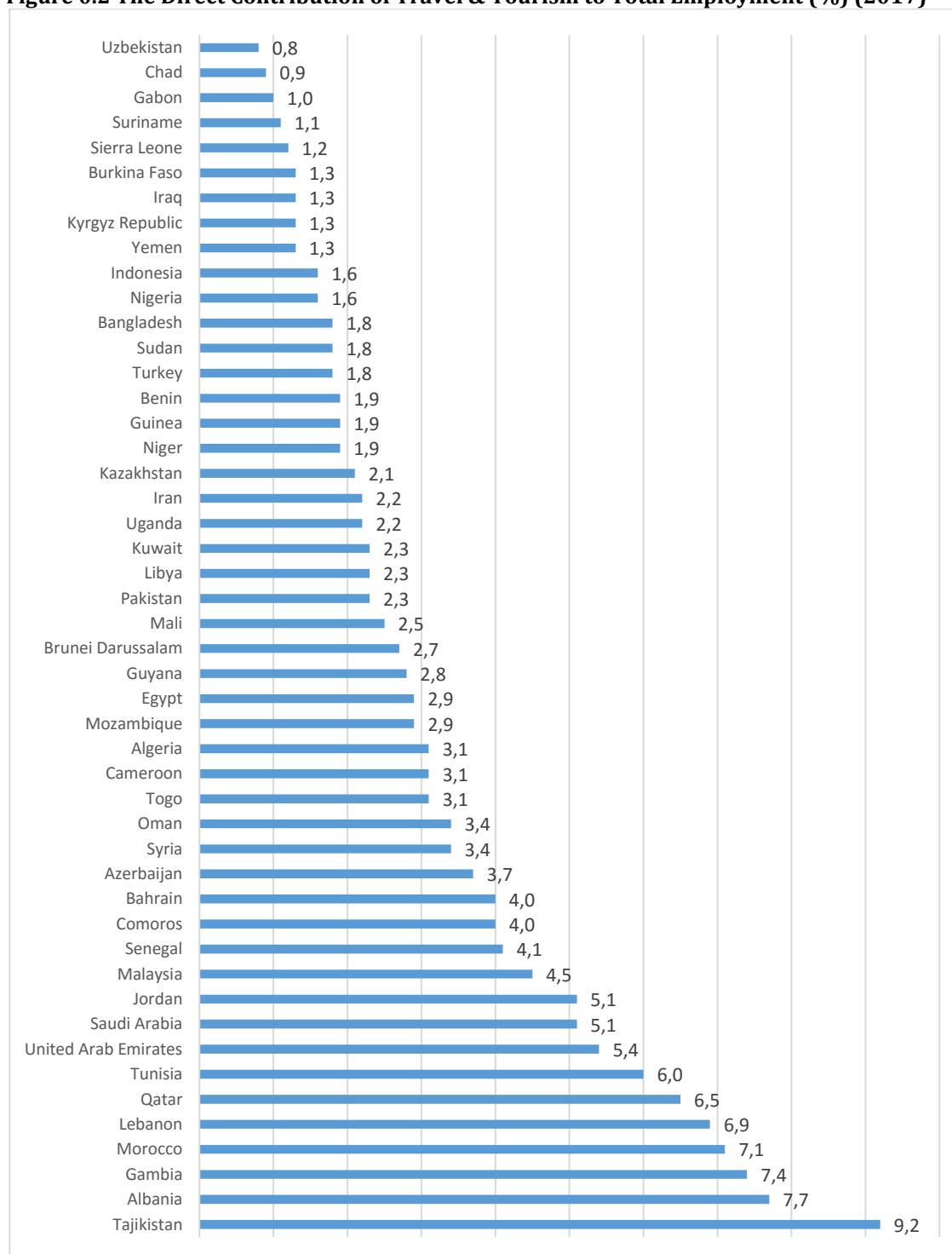
**Figure 0.1 The Direct Contribution of Travel & Tourism to Member Countries' GDP (%) (2017)**



Source: WTTC, Country Reports, 2018

In Figure 4.2, direct contribution of travel and tourism to total employment of 48 member states can be explored excluding Maldives.

**Figure 0.2 The Direct Contribution of Travel & Tourism to Total Employment (%) (2017)**



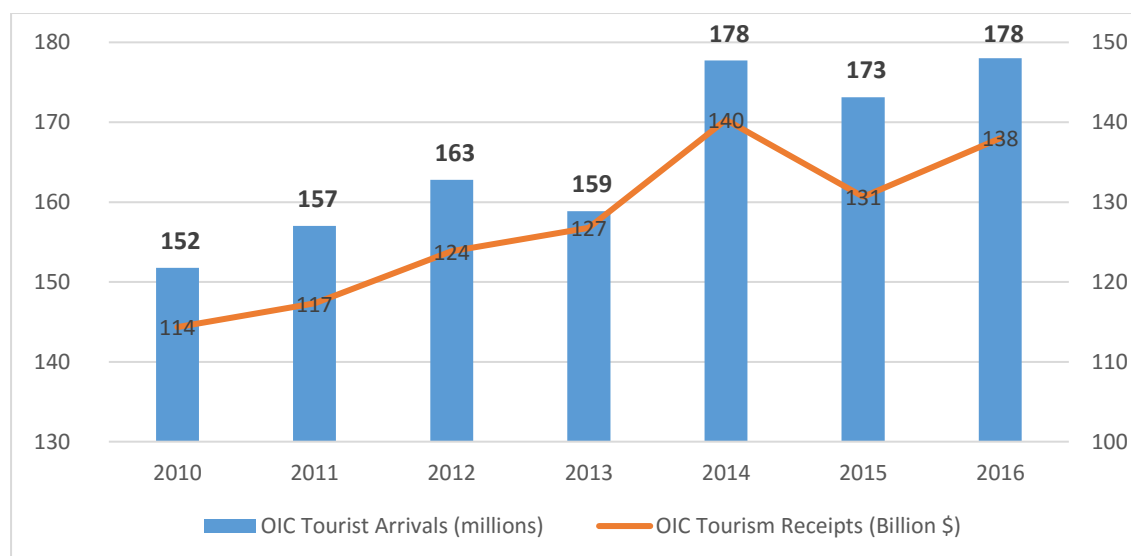
Source: WTTC, Country Reports, 2018

In 2017, Travel & Tourism directly supported 2.8% of total employment in 48 member states (See Appendix). Tourism continues to be an important economic sector capable of the creation of employment opportunities and poverty alleviation.

According to WTTC, 16% of total employment depends on travel and tourism in Maldives for the year 2017. Direct contribution of travel and tourism was 7.7% in Albania, 7.3% in Jordan and 7.1% in Morocco in 2017. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment, banking & finance and promotion and publicity services and so on tourism's contribution to employment tends to be slightly higher in these countries. However, in some countries like Uzbekistan, Chad and Gabon, travel and tourism contribution is less than other sectors.

Figure 4.3 displays international tourism activity in the member countries in terms of both tourist arrivals and tourism receipts in recent years. Because of lack of data on the number of tourist arrivals and tourism receipts of some countries estimations are made. During the 2010-2014 period, shown in Figure 4.2, there was a trend of increasing tourist arrivals, however, in 2015 the number of tourist arrivals decreased from 178 million to 173 million in OIC Member States and reached 2014 numbers back in 2016. The share in the total international tourist arrivals worldwide decreased from 14.6 percent in 2015 to 14.4 percent in 2016. 2017 data for the majority of OIC member are not yet available.

**Figure 0.3 Tourist Arrivals and Tourism Receipts in the OIC Member Countries**



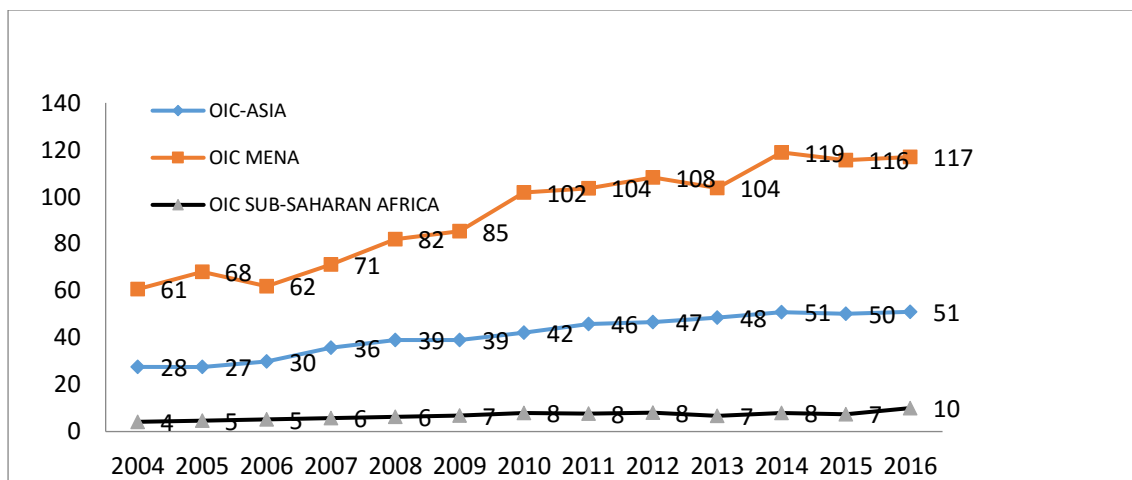
Source: adopted from UNWTO, 2017

The number of tourism receipts of the member countries increased from \$131 billion in 2015 to \$138 billion in 2016, corresponding to a 10 percent share in world's total tourism receipts. In 2016, unusually strong exchange rate fluctuations significantly influenced receipts for member

countries expressed in current US dollars. As the US dollar appreciated against other currencies in 2016, actual earnings in local currencies converted to US\$ were in many cases lower than in 2016. In absolute terms, tourism receipts in OIC member states increased by US\$ 7 billion. Generally, a certain destination becomes more price-competitive when its currency depreciates relative to the currencies of its source markets. Similarly, it becomes less affordable, when its currency appreciates against the currencies of its visitors. An appreciating currency increases the purchasing power of a country's travelers abroad, but makes the destination more expensive for international generating markets against whose currencies it has appreciated.

It can be useful to analyze the trends by grouping the OIC member countries as OIC-MENA, OIC-Asia, and OIC-Sub-Saharan Africa, which are provided at Figure 4.4. As displayed in the figure OIC-MENA has the biggest share among tourist arrivals in the member states. In this region, the number of tourist arrivals increased from 116 million to 117 million in 2016 according to available data.

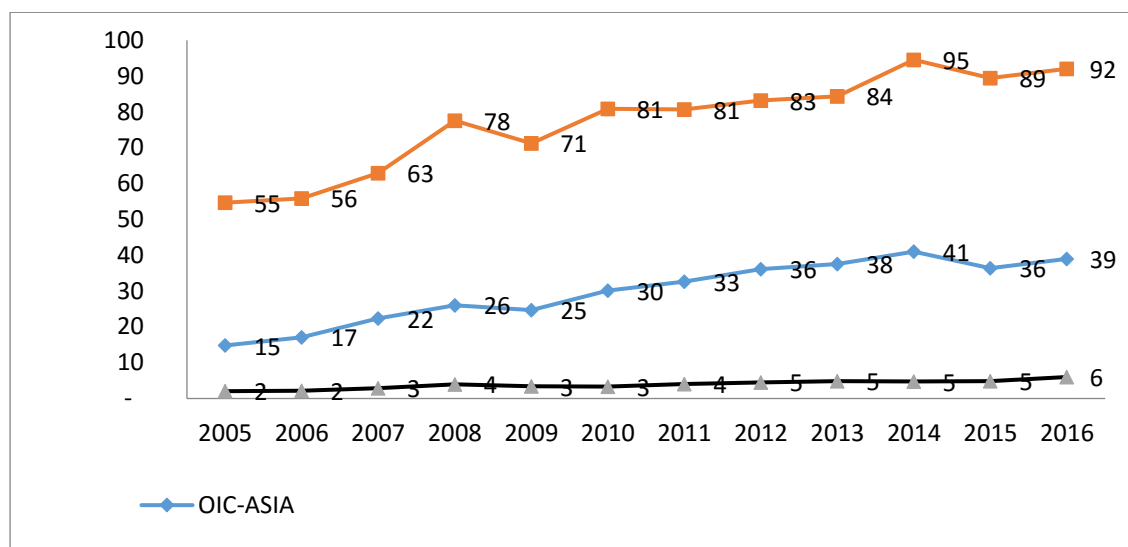
**Figure 0.4 Tourist Arrivals in the OIC Sub-Regions (Millions)**



Source: UNWTO Tourism Highlights 2006, 2009 and 2017 Editions.

Figure 4.4 shows that OIC-Asia has experienced continued growth in tourist arrivals for the period 2004-2016. In 2016, 51 million tourists travelled to OIC-Asia region. The OIC-Sub-Saharan Africa constitutes the smallest portion of the international OIC Tourism but this region experienced a strong growth in 2016. Similar analysis can be made for tourism receipts in these groups. Figure 4.5 shows that tourism receipts in OIC-MENA is greater than the other two regions.

**Figure 0.5 Tourism Receipts in the OIC Sub-Regions**

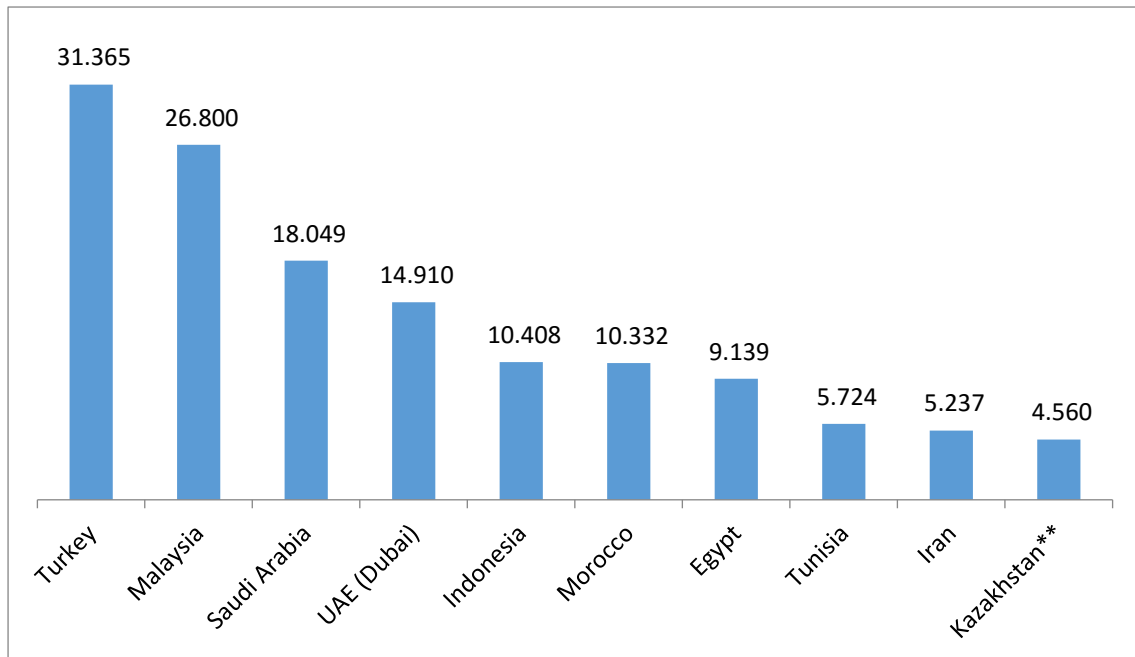


Source: UNWTO Tourism Highlights 2006, 2009 and 2016 Editions.

According to available data, tourism receipts in OIC Mena increased from \$89 billion in 2015 to \$92 billion in 2016. It is important to note that exchange rate fluctuations can represent comparisons in total spending between countries, as well as changes in absolute terms over time. For example, if the US dollar appreciates versus the currency of one-member state, tourism spending in this country translates into a lower amount of US dollars from one year to another. This does not necessarily mean that spending was lower, but simply that the same amount of that country's currency converts into less dollars.

The distribution of the tourist arrivals and tourism receipts among the OIC Member States has demonstrated the fact that international tourism in the Member Countries is concentrated in a few countries. In terms of tourist arrivals, Turkey, Malaysia, Saudi Arabia, Morocco, United Arab Emirates (UAE), Egypt, Indonesia, Tunisia, Iran and Kazakhstan were the top 10 international tourist destinations among the Member Countries in 2016. As shown in the Figure 4.6, these 10 countries together hosted 136.5 million international arrivals in 2016.

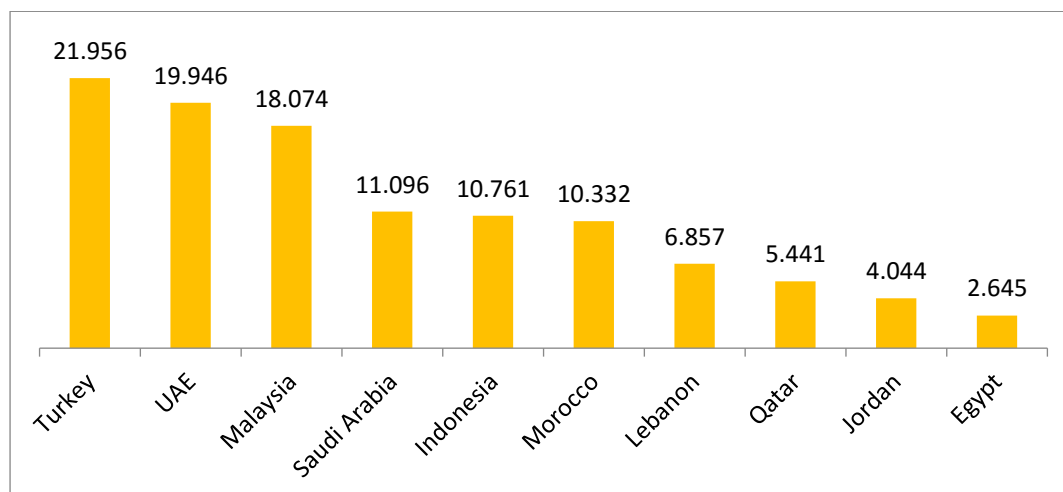
**Figure 0.6 Top 10 OIC Tourism Destinations in International Tourist Arrivals (Thousand) (2016)**



Source: UNWTO, Tourism Highlights (2017) & Republic of Turkey Ministry of Culture and Tourism  
 \*\* 2013 data

Concerning the international tourism receipts, top 10 Member Countries, shown in Figure 4.7, earned US\$ 111 billion as international tourism receipts in 2016. This was US\$ 109 billion in 2015, thus a surplus of around 2 billion USD was created last year.

**Figure 0.7 Top 10 OIC Tourism Destinations in International Tourism Receipts in 2016 (Million US \$)**



Source: UNWTO, Tourism Highlights 2017

As in the case of OIC tourist arrivals, the Figure 4.7 indicates that tourism receipts in the OIC countries are concentrated in a small number of countries, almost the same countries of the main COMCEC tourist destinations. The remaining OIC Member Countries' tourist arrivals and tourism receipts data are given in Appendix (Table 1 and Table 2) most OIC member statistics are not yet available for 2017.

Turkey hosted 39.5 million tourists in 2015. Because of the recent developments, terrorist activity and attempted coup, the country has suffered in terms of inbound arrivals in 2015 and 2016. Necessary measures are taken by the government in order to recover from the decrease in tourist arrivals. Almost 25% of the arrivals were lost in 2016 in Turkey which had 31 million arrivals. Signs of recovery in 2017 (39 million arrivals) and beginning of 2018 is evident concerning arrivals. UAE recorded and increase from 10 million to almost 16 million in 2017. Malaysia also recorded a slight increase. Malaysia introduced online visa applications for its major markets. Awareness of the country's many attractions is improving and international transport connections are expanding, making Malaysia much more accessible to potential visitors. As number of visitors to Malaysia increases over time, it is expected that investment in the hotel and accommodation sector will expand. Moreover, Malaysia Airlines and Emirates Airlines are launching a widespread code-share partnership in 2016, expanding Malaysia Airlines' access to European destinations and Emirates' access to various destinations in Asia (BMI Research, 2016). 2017 arrivals reached almost 26 million for Malaysia.

Saudi Arabia reported a slight increase in 2016. Following the tragic loss of life in the September 2015 stampede during a Hajj ritual outside of Mecca, the government, having come under significant international criticism for its handling of the event, has committed to major investments in transport, safety and accommodation infrastructure in order to support the rapid expected expansion in international arrivals each year for religious pilgrimage. The government



is reportedly considering easing visa restrictions to encourage more international tourism arrivals. Further, the outlook for sector has arguably brightened following the launch in April 2016 of the government's economic diversification strategy, referred to as Vision 2030. Religious pilgrimages remain the largest source of inbound tourism to Saudi Arabia and the government continues to invest in supporting infrastructure such as the 450km high speed rail network connecting Madinah with Makkah, King Abdullah Economic City and Jeddah (BMI Research, 2016). Saudi Arabia hosted more than 16 million arrivals in 2017.

Indonesia recovered from the impact of large scale forest fires which started in July 2015 and also affected some of its neighbors, especially Malaysia and Singapore, where smoke and haze caused an important problem (UNWTO, 2016d). The tourism industry in Indonesia is growing rapidly, benefiting from proximity to major regional markets, an expanding luxury hotel sector and greater international air connectivity. Also supporting growth in the tourism sector is ongoing and widespread government led investment in transport infrastructure which is gradually improving accessibility across Indonesia's many islands. Indonesia's Tourism Ministry has announced new tourism policies aimed at increasing the volume of international visitors - aiming, for example, for 1mn Japanese tourists annually and 20mn visitors from the Middle East annually by 2019. In order to support this growth Indonesia has introduced visa free travel for visitors from 90 countries allowing a 30-day tourism stay for many markets including Saudi Arabia and India (BMI Research, 2016).

In 2015, Morocco (-1%) posted weak results, affected by a decrease in arrivals from its major source market France. The strength of the euro against the Moroccan dirham, combined with the increasing number of low-cost airlines and routes between European countries and Morocco, will drive up the number of inbound arrivals in the next five years. A slight increase in arrivals and a larger impact on receipts from 6bn to 7 bn USD is already recorded in 2016. Morocco hosted more than 11 million tourists in 2017 and earned more than 7 bn USD.

Iran reported 5.4% increase in tourist arrivals in 2015. The government has defined twelve areas in the Sixth Development Plan (2016-21) with solely focusing on tourism. Since desert-trekking appears to be a favorite hobby of western travelers, the authorities have resolved to create 2,000 ecotourism resorts by the end of the sixth five-year development plan (2016-21), nearly a third of which will be located in Lut Desert. The government also expressed that Iran will unveil an investment package of 1,300 projects in the coming days to attract foreign investment and boost the badly-hit tourism industry (Dailymail, 2015 October).

In North Africa, international arrivals in Tunisia and Algeria started to grow considerably in 2016 after security problems in 2015 (BMI Research, 2016). Growth continued by roughly 20% in 2017 for both countries.

In order to compare the performance of the countries, major surplus on the travel balance would be a useful tool, since it shows that more foreign exchange stays in the country. Table 4.2 shows member countries by major surplus on the travel balance between 2013 and 2016.

**Table 0.2 Member Countries by Major Surplus/Deficits on the Travel Balance in 2013-2016 (US\$ billion)**

	Tourism Receipts			Tour. Expenditures			Balance		
	2014	2015	2016	2014	2015	2016	2014	2015	2016
<b>Turkey</b>	29.6	26.6	19	5.1	5.4	4,8	24.5	21.2	14.2
<b>Malaysia</b>	22.6	17.6	18.1	12.4	10.5	10.5	10.2	7.1	7.6
<b>Morocco</b>	7.1	6.0	6.5	1.4	1.4	1.5	5.6	4.6	5
<b>Indonesia</b>	10.3	10.7	11.3	7.7	7.3	7.7	2.6	3.4	3.6
<b>Egypt</b>	7.2	6.1	2.6	3.1	3.4	-	4.1	1.7	-
<b>Kuwait</b>	0.4	0.1	0.2	11.3	12.4	12.3	-10.9	-12.3	-12.1
<b>S. Arabia</b>	8.2	10.1	12.1	24.1	20.7	16.7	-15.9	-10,6	-4.6
<b>UAE</b>	14.0	16.0	19.4	14.4	15.1	17.1	-0.4	0.9	2.3
<b>Qatar</b>	4.6	5.0	5.4	8.7	8.2	9.6	-4.1	-3.2	-4.2

Source: UNWTO, 2017 Tourism Barometer Volume14, June 2017.

According to the Table 4.2, Turkey ranked as 6<sup>th</sup>, Malaysia as 14<sup>th</sup>, Morocco as 19<sup>th</sup> and Indonesia as 22<sup>nd</sup> country by major surplus on the travel balance in international tourism market. In 2016, for example Turkey's tourism receipts from foreigners were US\$ 18.1 billion, however Turkish citizens spent around US\$ 5 billion in other countries. This means that US\$ 14.2 billion stayed in the country as a surplus on the travel balance. This surplus is very important for countries as a source of foreign exchange in their economies. It can be realized from the Table 4.2 that some countries have a tendency to spend more than their tourism receipts. It is obvious that the majority of these countries are the main OIC international tourism destinations and earners. It is also observed that the balance of international tourism of some member countries accounts for a high percentage of their international tourism receipts. For example, countries like Saudi Arabia, Kuwait and Qatar have deficits on travel balance.

Safety and security concerns and political stability are emerging as major challenges for OIC member states, and it is assumed that these issues will continue to cause difficulties in the years ahead. Governments should work hard to ensure the safety of tourists and to minimize the impact of security threats. Terrorist incidents, refugee crises are still important obstacles for tourism in the region. The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and will affect market share and rankings of OIC destinations.

## Destination Marketing in the OIC Member Countries<sup>1</sup>

Tourism destinations can be seen as amalgam of attractions, services, facilities, infrastructure, landscapes, culture, hospitality and events which requires a coordination among different actors. By interacting with these resources and stakeholders, tourists create their own experiences. Because there are various stakeholders involved in selling destination products in distant markets a central agency should have a lead marketing role. This leading role was usually taken by the central government, promoting the destinations in the country until private sector is also involved in destination marketing activities recently. There is a general agreement on the importance of marketing these services in a way that creates an overall image of the destination for success in tourism industry. The effectiveness of the marketing activities might also be maximized if the stakeholders are coordinated to offer a consistent message and align their efforts on a shared marketing vision of the destination. Considering various actors and factors involved in creation of the overall image, and self-serving bureaucracies of public marketing organizations, destinations need a holistic approach in marketing that would coordinate and lead various stakeholders, create economies of scale and integrate their efforts effectively.

The role of meta marketing in destination success has also been acknowledged in the literature. As dynamic systems, destinations require complex and sophisticated structures to design and implement their marketing strategies. Such a holistic view of destination marketing can be available at national (NTO) and regional (DMO) tourism organizations or an independent destination marketing structure might also have been initiated in the locality.

Although the importance of a central destination marketing function is acknowledged there are debates on how this should be accomplished. What should be the structure of such a marketing committee, what are the responsibilities, how should stakeholder involvement be improved, should it be state-led or market-led, what are the activities that should be outsourced, how can destinations benefit from economies of scale in marketing, synergy and cost sharing, how can the funds needed be raised, what are different successful benchmarks and examples remain to be at the center of discussion. For example, if there is a DMO present at the destination, one of the responsibilities of the DMO becomes marketing of the destination. But how actually this marketing action is performed effectively within the DMO or any other structure needs clarification.

Marketing strategies are important for destinations overall success in the long term for destinations at the introduction, growth and maturity stages of their lifecycle. The effectiveness of destination marketing depends on the institutional structures and processes that integrate different stakeholder perspectives into a unified whole. There are already a number of organizations involved in tourism marketing and promotion working under governmental structures and ministries in OIC. However, although these organizations have dedicated funds to realize destination marketing efforts; they usually lack the expertise, structure and orientation to act as an efficient coordinating and leading body. Destination Marketing Organization can be classified under different categories as listed at Table 4.3.

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<sup>1</sup> The 12<sup>th</sup> Meeting of the COMCEC Tourism Working Group will be held with the theme of Destination Marketing Strategies in the OIC Member Countries. Thus, the Tourism Outlook 2017 includes this section as an introductory section for the meeting.

Table 4.3 Typology of DMOs

Category	Definition	Variation of terms	Example
National Tourism Office (NTO)	Officially recognised as responsible for coordinating the destination marketing planning for a nation.	National Tourism Organization National Tourism Administration	Visit England <a href="https://www.visitengland.com/biz/home">https://www.visitengland.com/biz/home</a>
State Tourism Office (STO)	Officially recognised as responsible for coordinating the destination marketing planning for a state, or province, in a country with a federal political system.	Provincial Tourism Office	Hawaii Visitors and Convention Bureau, USA <a href="http://www.hvcb.org">www.hvcb.org</a>
Regional Tourism Organisation (RTO)	Officially recognised as responsible for coordinating the destination marketing planning for the political boundary of a local regional area such as a city or town.	Regional Tourism Board Convention and Visitors Bureau Regional Tourism Association Regional Tourism Partnership	Northland Inc, New Zealand <a href="http://www.northlandnz.com">www.northlandnz.com</a>
Local Tourism Association (LTA)	Membership based association of tourism related services that coordinates the local destination marketing planning for a district within an RTO catchment.		Flinders Island Tourism Association, Australia <a href="http://www.visitflindersisland.com.au">www.visitflindersisland.com.au</a>
Macro Region Tourism Organisation (MTO)	A collaborative approach to the promotion of several destinations, either at a local or national level, which supplement rather than replace the activities of individual member DMOs.	Macro Region Marketing Organization Macro Region Marketing Association	Scandinavian Tourism Boards <a href="http://www.goscandinavia.com">www.goscandinavia.com</a>

Source: Pike et al., 2018

Different than individual products and services, destinations are “systems” and “networks”, beyond physical spaces, hence destination marketing efforts should be coordinated and structured by a central authority, taking its roots from excellent networking capability, as well as professionalism, transparency, and resource endowment. A number of destinations are creating and funding such structures as a tool to thrive in the market. Without a well designed marketing strategy and stakeholder engagement; individual marketing activities and actions might overlap, become fragmented and result in waste of valuable resources and effort. Thus a central destination marketing would create the much needed collaboration and efficiency in destination marketing. Such structures are usually available at successful regional DMOs and national NTOs, yet their management, strategies, funding and activities require further attention. Therefore, understanding the processes that lie within the potential destination

marketing models is an important step for OIC countries. Equity, participation, accountability, responsiveness, transparency, monitoring and control are other features of effective central marketing strategies.

Destinations creating such structures and policies demonstrate more successful outcomes. Hence analysis of destination marketing strategies both for planned and current destinations might offer valuable insights and building blocks for OIC destinations. Benchmarking various best practices and institutional landscapes, planning a sustained image, involving all stakeholders, ensuring effective marketing of the destination, improving visitor loyalty and recommendation might also be possible through efficient marketing strategies. This topic also relates to various other problems faced by OIC countries such as; creating tourism products, segmenting, targeting, positioning and branding destinations, increasing number of overnights and per tourist spending, enhancing loyalty and recommendation, electronic marketing, creating and managing distribution channels and so on. If effective destination marketing strategies might be identified most of these challenges might be prevented and overcome easier. Major DMO responsibilities are displayed on table 4.4.

Table 4.4. Major DMO Responsibilities

Step	Aim	Responsibility
<b>Segmentation</b>		
Secure full institutional support	Involvement and support by senior management in all organisational units.	Management.
Determine the ideal market segment	Agreement within the organisation on which criteria will be used to evaluate segments.	Management.
Collecting data	Have available high-quality, valid, relevant empirical data.	Management. Data analyst.
Exploring data	Insight into the structure of the data to determine nature of the segmentation solution.	Data analyst.
Extracting segments	Grouping consumers into segments.	Data analyst.
Profiling segments	Identifying the key defining characteristics of each segment.	Data analyst.
Describing segments	Providing a rich description of each market segment.	Data analyst.
<b>Targeting</b>		
Evaluating segments	Use the segment evaluation criteria identified earlier to evaluate selected segments.	Management.
Selecting (a) target segment(s)	Based on this evaluation select one or a small number of market segments to target.	Management.
Customizing the product, price, distribution and promotion	Using the profiling and rich descriptive information about the target segment(s) to develop a customized marketing mix.	Management.
<b>Positioning</b>		
Determining the optimal positioning	Using the profiling and rich descriptive information about the target segment(s) to develop a positioning strategy.	Management.

Repositioning	If required, take marketing action to adjust the positioning.	Management.
Monitoring	Monitor on a continuous basis changes in market segments as well as positioning and adapt if necessary.	Management. Data analyst.

Source: Dolnicar et al., 2018

The details of suggested destination marketing strategies, tactics and actions are to be presented during the 12th Meeting of the COMCEC Tourism Working Group in September, 2018. In the analytical report, it is expected that these recommendations will be elaborated for the member countries and offer solutions and implementation for improving both volume and quality of tourism activity.

## Importance of Tourism Cooperation in the Member Countries

### 6.1 Tourism Potentials & Obstacles Faced in the Tourism Development and Cooperation in the Member Countries

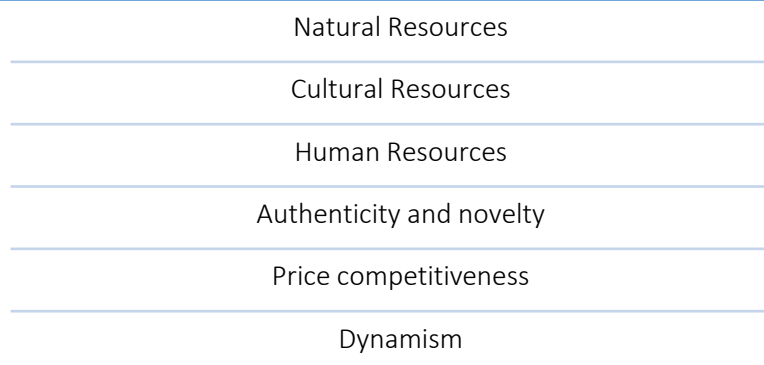
OIC Member Countries have potential for the development of a sustainable international tourism sector with rich and diverse natural, geographical, historical and cultural heritage assets. OIC Member Countries' performances in tourism sector indicate that the share of the Member Countries in the global tourism sector is behind full potential and there is still a great deal of scope for realizing their full capacity.

It is acknowledged that both established and new destinations need to plan and create the adequate conditions and policies with regard to:

- Business environment
- Infrastructure
- Travel Facilitation
- Marketing
- Human resources

So the Member Countries can increase the social and economic benefits and minimizing negative impacts via utilizing the tourism potential.

#### Figure 0.1 Tourism Opportunities in the Member Countries



Tourism is a dynamic sector that is subject to political, social, environmental and technological trends, shaping tourist preferences, skill requirements of tourism related-jobs and structure of the tourism market. It is crucial for the Member Countries to engage in the long-term global tourism market trends and to build sound tourism policies in order to improve their competitiveness in the global tourism market.

There are many challenges faced by the Member Countries for developing their tourism sector and making it internationally competitive. Challenges faced in the tourism development are diverse as each country has its own tourism assets, level of development and national development priorities and policies. The challenges affecting tourism performance in the Member Countries ranges from, among others, insufficient tourism-related infrastructure and investments, unskilled tourism workforce to low-capacity tourism administrations and lack of safety and security (COMCEC Progress Report, 2013), as shown in Figure 6.2.

In order to address the challenge of insufficient tourism-related infrastructure and investments, the quality and efficiency of tourism infrastructure and services need to be improved in conformity with the international standards. To develop tourism-related infrastructure in the Member Countries, private sector's resources can be utilized. In this respect, Public-Private Partnerships (PPPs) can be promoted and an enabling environment can be provided for attracting more FDI in the tourism sector. In the case of many Member Countries, these challenges still include the lack of technical know-how and the weak promotional activity.

Due to its labor-intensive nature, tourism sector requires a highly qualified workforce that has a direct effect on the quality of tourism services. Despite the fundamental awareness and basic perception of the economic importance of tourism as an industry and its positive impact as a potential source of foreign exchange earnings and employment, in many cases there is lack of trained tourism workforce. Thus, training programs and projects need to be developed for upgrading the quality of workforce in the member countries.

**Figure 0.2 Challenges Affecting Tourism Performance in the Member Countries**

Insufficient Tourism Investments and Infrastructure
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

These challenges should be addressed for the sustainable growth of tourism sector in the Member States. These are common challenges among the countries; however, each member state should specify the high-priority challenges considering its own conditions and try to solve the problems in the tourism industry.



The issue of developing consistent tourism strategies and policies is also one of the main challenges facing many Member Countries, which are still experiencing difficulties in developing integrated tourism policies. Effective administration, data collection, regulation and institutional frameworks are important issues to be improved for the tourism activities.

The absence or weak publicity promotion and mass media exposure due to the limited communication systems and technological services are other obstacles for tourism development in the OIC Member Countries. It is recognized that electronic media (CD-ROM maps, Internet, web sites, etc.) will be increasingly used for the purpose of choosing destinations and making reservations. Therefore, the COMCEC countries should improve their promotion through electronic official and social media.

## **6.2 Tourism Cooperation under the COMCEC Umbrella**

Tourism cooperation could play a significant role in the socio-economic development of the COMCEC Member Countries, if properly planned and managed.

The COMCEC Economic Summit, held in İstanbul in 2009, has prioritized the cooperation in the field of tourism sector. Since then, the COMCEC has increased its efforts for enhancing cooperation among the Member States in tourism.

In addition to ongoing activities such as Tourism Ministerial Meetings, workshops, seminars, tourism fairs, COMCEC encourages modalities that enable involvement of relevant stakeholders such as private sector and local communities in tourism activities. In this respect, the "OIC/COMCEC Private Sector Tourism Forum" was established in 2011 and convened its 1st Meeting on 7-8 December 2012 in İzmir, Turkey. The Forum annually brings together the private sector representatives of the member states operating in the field of tourism to share their experience and explore ways and means to enhance the cooperation in this field. The 2nd Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 16-17 December 2013 in İstanbul with the theme of "Effective Marketing Strategies for Promoting Tourism Destinations in the OIC Member Countries."

Moreover, the 3rd Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 29-30 January 2015 in İstanbul with the theme of "International Branding of Tourism Destinations in the OIC Member Countries." The Forum emphasized the importance of effective marketing and branding strategies for promoting the tourism destinations in the OIC Member Countries and highlighted that effective marketing and branding requires utilization of full range of tools available including digital marketing activities, social media, mobile phone applications, PR, and so on. Furthermore, importance of multi-stakeholder engagement is underlined as a critical success factor for tourism branding particularly through utilizing Public Private Partnerships and stressed the significance of joint endeavors such as joint promotion work, cultural tourism routes and joint tours and familiarization programs/trips to overcome the negative media image of Islamic Countries resulting from misguiding media coverage and problems like Islamofobia, Epidemics, Terror, and so on.

The 4th Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 14-15 January 2016 in İstanbul with the theme of "Promoting Muslim-Friendly Tourism (MFT) Products and Services in the OIC Member Countries." In this forum, the participants discussed the current



state of international tourism in the OIC Member Countries as well as prospects and challenges in this regard. Moreover, the participants also deliberated on the global trends and policies in promoting MFT products and services and the challenges faced by the private sector in the Member Countries in promoting MFT products and services. The participants emphasized the importance of raising awareness about MFT, not only in the OIC Member Countries, but also in the Non-OIC world. In this regard, the participants highlighted the significance of the effective utilization of the existing mechanisms under the OIC/COMCEC, such as SMIIC's technical Committee on tourism, for enhancing cooperation in MFT.

Tourism has been defined as one of the six cooperation areas in **the COMCEC Strategy**, adopted by the 4th Extraordinary Summit held on 14-15 August 2012 in Makkah Al-Mukarramah, Saudi Arabia.

The Strategic Objective defined by the COMCEC Strategy is ***“Developing a sustainable and competitive tourism sector in the OIC Member Countries.”*** With a view to achieving this objective, the Strategy envisages five output areas, namely regulatory framework; training and capacity building programs; private sector involvement; community based tourism programs and marketing strategies.

**Figure 0.3 Output Areas in the Tourism Section of the COMCEC Strategy**



In order to achieve the objectives in the field of tourism, the COMCEC Strategy brings two new and well-defined implementation instruments, namely Tourism Working Group and the COMCEC Project Cycle Management (PCM).

COMCEC Tourism Working Group aims at providing a platform for the member states for elaborating issues thoroughly, sharing their experience and best practices and creating a common understanding to respond their common problems.

In this framework, the 1st Meeting of the COMCEC Tourism Working Group was held on April 25th, 2013 in Ankara, Turkey with the theme of *“A New Trend in Sustainable Tourism Development: Community Based Tourism in the OIC Member Countries.”* The Meeting was attended by the representatives of 15 Member States, which have notified their focal points for

the Tourism Working Group. The relevant OIC institutions and some scholars have also attended the Meeting. The representatives of the Member States have shared their experiences, achievements and challenges in implementing the Community-Based Tourism (CBT) Programs in their respective countries. The Meeting has considered the Studies namely “Community Based Tourism: Finding the Equilibrium in the COMCEC Context” commissioned by the COMCEC Coordination Office and the “Tourism Outlook 2013” prepared by the COMCEC Coordination Office. The outcomes of the Meeting were published by the COMCEC Coordination Office with the document titled the “Proceedings of the 1st Meeting of the Tourism Working Group”, available on the COMCEC website ([www.comcec.org](http://www.comcec.org)).

The 2nd Meeting of the COMCEC Tourism Working Group was held on October 3rd, 2013 in Ankara, Turkey with the theme of “*Tourism Product Development and Marketing Strategies in the OIC Member Countries.*” The Meeting was attended by the representatives of 11 Member States, which have notified their focal points for the Tourism Working Group and representatives of the COMCEC Coordination Office, SESRIC and Islamic Center for Development of Trade (ICDT) and some private sector representatives. The COMCEC Tourism Outlook and an analytical study namely “Tourism Product Development and Marketing Strategies” have been prepared and submitted to the Meeting. The representatives of the Member States have shared their experiences, achievements and challenges in tourism product development and marketing strategies in their respective countries as well as explore cooperation potential among each other. The Meeting highlighted that tourism product development and marketing requires effective collaboration among different stakeholders. It was stressed that because of its competitive nature, effective marketing requires utilization of the full range of tools available including among others PR activities, e-marketing, social media, and so on. Some recommendations have been made for enhancing cooperation among the Member Countries in the field of product development and marketing. These were, among others, introducing award programs, conducting joint exhibitions, developing joint tourism products, organizing exchange programs for experts and developing joint data base for tourism products among the Member Countries. Moreover, Proceedings of the Second Meeting of the Tourism Working Group, which reflects the outcomes of the Meeting was prepared and published on the COMCEC Website ([www.comcec.org](http://www.comcec.org)).

The 3rd Meeting of the COMCEC Tourism Working Group was held on March 4th, 2014 in Ankara, Turkey with the theme of “*Enabling Tourism Investment Climate in the OIC Member Countries.*” The Meeting was attended by the representatives of 14 Member States, which have notified their focal points for the Tourism Working Group and representatives of SESRIC, Islamic Center for Development of Trade (ICDT), International Finance Corporation (IFC) and representatives from private sector. The Representatives of the Member States have shared their experiences, achievements and challenges regarding tourism investments in their respective countries. Moreover, the Studies titled “Enabling Tourism Investment Climate: Challenges and Prospects for Tourism Investments in the OIC Member Countries” commissioned by the COMCEC Coordination Office and the “COMCEC Tourism Outlook 2014” prepared by the COMCEC Coordination Office were the main inputs for enriching the discussions during the Meeting. The presentations and deliberations made during the meeting highlighted that governments play a crucial role for creating an enabling investment climate for tourism investors. It was stressed that creating an enabling tourism investment climate requires

utilization of the full range of tools and strategies including among others, provision of clear, updated information and prompt responses to investor inquiries, updated investment promotion websites, effective coordination among relevant stakeholders, providing infrastructure (including road networks, electricity, etc.), allocation of land for specific tourism projects, effective incentive packages, easy procedures and financial support for the local tourism SMEs as well as foreign entrepreneurs and utilization of alternative investment financing options such as crowdfunding.

The 4th Meeting of the COMCEC Tourism Working Group was held on September 4th, 2014 with the theme of “Enhancing the Capacity of Tourism Workforce in the OIC Member Countries for Improved Tourism Service Quality.” The participants deliberated on tourism workforce capacity, identify the challenges faced by the Member Countries as well as possible solutions to address these challenges. The Meeting provided opportunity to the Member Countries to learn from each other’s experience and good practices. During this meeting, Tourism Working Group discussed two policy options:

- Developing Tourism Workforce Development Strategies in the Member States and supporting the effective implementation of the existing ones
- The importance of enhancing the capacity of tourism workforce in the member countries.

The policy recommendations of the 4th Meeting of the Tourism Working Group were submitted to the 30th Ministerial Session of the COMCEC held on 25-28 November 2014 in İstanbul. The 30th Session of the COMCEC commended the efforts of the Working Groups towards approximating policies among the Member States in their field of competence and took note of the policy recommendations of the Tourism Working Group.

The 5<sup>th</sup> Meeting of COMCEC Tourism Working Group was held with the theme of “Travel Facilitation for Enhancing Mobility in the OIC Member Countries” on February 5<sup>th</sup>, 2015. In line with the recommendations of the analytical study and the responses of the Member Countries to the policy questions, which were circulated before the Meeting, the Working Group put forward two policy recommendations in the meeting:

- Encouraging visa facilitation among the Member Countries;
- Developing air linkages and increasing the airline capacity were highlighted by tourism working group.

The 6th Meeting of the Tourism Working Group was held on September 3rd, 2015 with theme of “Effective Tourism Marketing Strategies: ICT-Based Solutions for the OIC Member Countries.” The Representatives of the Member States have shared their experiences, achievements and challenges on ICT-based tourism marketing in their respective countries. The Meeting has considered the Studies "Effective Tourism Marketing Strategies: ICT-Based Solutions for the OIC Member Countries" commissioned by the COMCEC Coordination Office and the "COMCEC Tourism Outlook 2015" prepared by the COMCEC Coordination Office. The Meeting has come up with a set of policy recommendations:

- Building and Strengthening a Skilled Workforce on ICT-Based Tourism Marketing in the Member Countries.
- Enhancing cooperation between the government and private sector on ICT usage and diffusion in tourism marketing.
- Developing comprehensive and effective digital marketing strategies in the Member Countries.

7th Meeting of the Tourism Working Group was held on 4 February 2016 with the theme of “Muslim Friendly Tourism: Understanding the Demand and Supply Sides in the OIC Member Countries”. The Tourism Working Group provided the opportunity to thoroughly discuss the main concepts and the general overview of Muslim-friendly tourism from a policy perspective. In line with the recommendations of the analytical study, as well as the responses of the Member Countries to the policy questions that were circulated before the Meeting, the Working Group put forward the following policy recommendations:

- Developing basic guidelines for improving the basic MFT-related services.
- Increasing awareness about the MFT market among the travel industry stakeholders through standardizing terminology used in MFT, introducing market awareness and customer service training programs and utilizing social media for promotion and marketing.

Similarly, the policy recommendations of the 8<sup>th</sup> Meeting of the Tourism Working Group on “Muslim Friendly Tourism (MFT): Developing and Marketing MFT Products and Services in the OIC Countries” was submitted to the 32<sup>nd</sup> Session of the COMCEC held on 21-24 November 2016 in İstanbul. Following policy recommendations were suggested as the outcome of the meetings, discussions as well as the analytical studies:

- Developing a national Muslim Friendly Tourism strategy that links to the country’s overall tourism goals through focusing on building stakeholder awareness, establishing a dedicated MFT body/committee and developing a national MFT products/services and marketing development strategy.
- Conducting government-led MFT-focused destination marketing through developing an MFT branding and positioning for the benefit of local service providers and measuring the potential of a destination for MFT by funding/organizing short-term campaigns.
- Supporting SMEs through developing training and mentorship programs.
- Developing bilateral tourism cooperation within the OIC through technical knowledge exchange and joint promotion efforts for MFT destinations.

The 9<sup>th</sup> Meeting of the Tourism Working Group on “Muslim Friendly Tourism (MFT): Regulating Accommodation Establishments in the OIC Member Countries.” After the analytical report was presented, member countries, representatives of international organizations and private sector also shared their experiences. Various policy recommendations were suggested based on the discussion:

- Definition and standardization of certification of MFT facilities along the tourism industry.
- Developing a MFT strategy at the destination and offering incentives for MFT services and investments.

- Improving international cooperation on MFT certification on different requirements of MFT standards and appointing an authority responsible for MFT certification both at national and international levels.

The 10th Meeting of the COMCEC Tourism Working Group was held on September 21st, 2017 in Ankara, Turkey with the theme of “Risk and Crisis Management in Tourism Sector: Recovery from Crisis in the OIC Member Countries”. The Meeting has considered the Studies "Risk and Crises Management in Tourism in the OIC Member Countries" commissioned by the COMCEC Coordination Office and the "COMCEC Tourism Outlook 2017" prepared by the COMCEC Coordination Office. Following policy recommendations were suggested as the outcome of the meetings, discussions as well as the analytical studies:

- Recognizing and identifying threats and risks, planning scenarios for each of the likely threats, establishing crises management processes and recovery task force during pre-crises periods.
- Preparing national crises management strategies and contingency plans and communicate these with the tourism industry stakeholders.
- Diversifying products and market portfolio in order to expand the portfolio and target less sensitive markets.

The 11th Meeting of the COMCEC Tourism Working Group was held on February 15th, 2018 in Ankara, Turkey with the theme of “Destination Development and Institutionalization Strategies in the OIC Member Countries”. The Representatives of the Member States have shared their experiences, achievements and challenges regarding destination development in their respective countries. The Meeting has considered report on “Destination Development and Institutionalization Strategies in the OIC Member Countries” commissioned by the COMCEC Coordination Office. The policy recommendations offered after the meeting were as follows;

- Decentralization in destination management, empowering local structures and governance.
- Involving stakeholders including local governments, tourism industry, NGOs and public into destination planning and creating a shared vision of the destination.
- Improving private sector involvement in destination management, enhancing effectiveness and transparency of DMOs, diversifying their funding sources including membership fees and commercial income besides the public funding.

Another instrument envisaged by the COMCEC Strategy that will strengthen tourism cooperation among member states is the COMCEC Project Funding. The Strategy has a viable funding mechanism through which member countries registered to the Tourism Working Group submit projects to be financed through grants by the COMCEC Coordination Office. The first project call was made in September 2013. Within the framework of the 1st project call under the COMCEC Project Funding, 2 projects in tourism sector were successfully implemented in 2014. One of them was “Cities of Common Cultural Heritage” project implemented by Azerbaijan Ministry of Culture and Tourism. There were 3 partner countries namely; Turkey, Uzbekistan and Kazakhstan in this project. The project aimed at creating a joint cultural tourism product and at the end of the project with the help of the analytical study prepared as an outcome of the project, cultural heritage routes were created. The other project was “Improving Statistical

Capacities of Tourism Sector in COMCEC Mediterranean and Gulf Region” proposed by SESRIC. The project covered 6 member countries namely; United Arab Emirates, Jordan, Tunisia, Albania, Qatar, Oman. This project aimed at improving statistical capacities of the member countries in tourism field and entailed 8 training programs and one workshop in this respect.

The second project call under the PCM was made in September 2014. In this regard, within the scope of the 2nd Project Call, the project titled “Strengthening Community Resilience through eco-tourism”, proposed by The Gambia, was implemented in 2015 with two project partners, namely Senegal and Guinea-Bissau. Under this project, study visits to ten villages were conducted. Moreover, Ecovillage Design Education Programs were held with the participation of 35 residents from these villages. At the end of this project, an Ecovillage Design Education Report was prepared.

The Third Project Call was made in September 2015. In this framework, the following two projects were implemented in 2016:

- Short course on strategies in enhancing the tourism workforce in community-based tourism within the OIC Member Countries (proposed by Malaysia).
- Enhancing the capacity of craft producers in the OIC Member Countries (proposed by the Gambia).

The COMCEC Coordination Office made the fourth call for project proposals in September 2016. Within the scope of the 4th Project Call, four projects were implemented in 2017. The first project, implemented by The Gambia with two project partners namely Nigeria and Senegal, is “Developing a Training and Certification Program for the Muslim Travel, Tourism, and Hospitality Industry”. The aim of this project was to develop a training and certification programme. The second project was implemented by Mozambique with two project partners namely Mali and Senegal. The project titled “Enhancing Capacity of Muslim Friendly Tourism Workforce” was aimed at providing training for officials from the ministries of culture and tourism in the countries involved in policies, initiatives or strategies supporting Muslim Friendly Tourism.

The third project was implemented by Sudan. The project titled “Enhancing The Capacity of Craft Producers & Customers service In OIC Member Countries” conducted along with Chad and Djibouti was aimed at conducting a training of trainers programme for enhancing the capacity of craft producers and customer services so that improving their living standards and creating new jobs. The last project was implemented by the SESRIC with eighteen project partners. Within the scope of this project, a training programme was conducted.

The 5th Project Call was made in September 2017. Within the scope of the 5th Project Call, the following four projects were final listed and they are currently at the implementation period:

- “Strengthening the Resilience of Tourism Sector Against Crises through Communication” (proposed by Burkina Faso)

- “Training on Crisis Communication in Tourism for Selected OIC Member Countries” (proposed by Mali)
- “Community-Based Tourism through The Promotion of Heritage Sites for Poverty Alleviation” (proposed by Mozambique)
- “Improving Islamic Tourism Ecosystem in OIC Member Countries: Destination and Industry Development” (proposed by the SESRIC)

More detailed information on the COMCEC Project Funding mechanism can be reached through the COMCEC PCM Website: ([pcm.comcec.org](http://pcm.comcec.org)).



## Conclusion

Tourism industry has enjoyed continued expansion and diversification, becoming one of the most rapidly developing industries in the world. Tourism has evolved into a global phenomenon – one of the most important economic sectors and social activities of the time.

Tourism continues to be an important economic sector capable of attracting foreign direct investments and supporting sustainable economic development, the production of fairly distributed wealth, the creation of employment opportunities and poverty alleviation, particularly in developing countries and the Least Developed Countries.

According to the UNWTO statistics, 1.322 million international tourists travelled in 2017 with an average annual increase of over 4% since the year 2000. Tourism sector which already accounts for 10 percent of World GDP is an important source of employment and foreign exchange that should be supported by governments around the world as part of the policies for stimulating economic growth.

From the period 1980 to 2017, international tourism receipts—which are the export value of tourism, excluding international passenger transport—increased from US\$125 billion in 1980 to US\$ 1,332 billion in 2017 (UNWTO, 2018a) denoting a solid increase in four decades. In real terms, this corresponds to an average growth of 4 percent a year, which has almost the same pace as tourist arrivals.

The sector faces some challenges every year and 2018 is likely to be no different. Three main factors influenced tourism flows in 2016 and 2017; the exchange rate fluctuations, the decline in the price of oil and other commodities which increased disposable income in importing countries, as well as increased global concern about safety and security (UNWTO, 2018a).

However, the growth in tourism sector will continue at a stronger rate than last year, with the total contribution to GDP expected to increase by 4-5% in 2018. This growth will require OIC Member Countries to adopt a concerted and coordinated approach to planning and development within the industry, governments and educational institutions to ensure that they fulfill their potential in the future.

Considering the modest share of the OIC Member Countries in international tourism market, it is evident that the inherent potential has not yet been fully realized and manifested itself in desirable levels. For 2016 OIC received only 10% of tourism receipts and around 15% of arrivals. OIC Member States need to understand how they can strengthen the position of their tourism industry in response to current global economic challenges and remain competitive among emerging destinations, within a sustainable development perspective.

As in the case of OIC tourist arrivals, tourism receipts in the Member Countries are concentrated in a small number of countries, almost the same countries of the main OIC tourist destinations. The share of international tourism receipts in the total exports of each member country indicates that tourism plays a significant role in the economies of member countries and constitutes an important source of foreign exchange earnings.



By the groupings in the OIC Member Countries, it is observed that OIC-MENA has experienced expansion in tourist arrivals for the period 2004-2016. In the same period, OIC-ASIA has experienced growth in tourist arrivals. OIC- Sub Saharan Africa constitutes the smallest portion of the international OIC Tourism. In terms of tourism receipts, OIC-MENA's performance has been greater than OIC- Sub Saharan Africa and OIC-Asia in the period 2004-2016. Yet the preliminary statistics for 2018 oversees a larger growth in Africa and Asia.

In 2015, it was estimated that there were 117 million Muslim international travelers. This is projected to grow to 168 million by 2020, where the travel expenditure by Muslim travelers is expected to exceed USD 200 billion (CrescentRating, 2016). The COMCEC Tourism Working Group has also explored Muslim Friendly Tourism (MFT) potential in its three consecutive meetings. The 7<sup>th</sup> Tourism Working Group was held on February 4<sup>th</sup>, 2016, with the theme of *"Muslim Friendly Tourism (MFT): Understanding the Demand and Supply Side in the OIC Member Countries."* A research report was prepared on the theme of the meeting, which mainly focused on creating awareness about MFT as well as the developments regarding the demand and supply side of MFT in the Member Countries. This report, as well as the Member Country representatives during the 7<sup>th</sup> Working Group Meeting highlighted some major challenges faced by the member countries. In addition to the demand and supply sides of MFT, COMCEC analyzed product development and marketing aspects of MFT products and services and developing regulations for accommodation establishments to improve MFT among OIC member states. These were covered during the 8<sup>th</sup> and 9<sup>th</sup> Tourism Working Group Meetings.

Safety and security issues are also important challenges for the OIC Region along with the World. In this respect, COMCEC Tourism Working Group has focused on risk and crises management issues in its 10<sup>th</sup> meeting in 2017. Furthermore, destinations are amalgam of services and products that tourists consume as a whole. It is evident that if properly planned and managed tourism cooperation could play a significant role in the socio-economic development of the Member Countries. COMCEC is also considering destination planning, management and marketing issues from 2018 onwards. The governance of destinations has been covered during the 11<sup>th</sup> meeting and their marketing role will be covered in September, 2018 during the 12<sup>th</sup> Tourism Working Group Meeting in Ankara. The sustainability of destinations and creating a balance between the needs of the industry, the environment and locals will be discussed during the 13<sup>th</sup> meeting in 2019.

The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and improving accessibility, developments in technology and e-commerce will also affect market share and rankings of destinations. Obstacles faced in tourism development are diverse in the Member Countries as each country has its own tourism features, level of development and national development priorities and policies. The challenges affecting tourism performance in the Member Countries ranges from, among others, insufficient tourism-related infrastructure and investments, unskilled tourism workforce to low-capacity tourism administrations and problems in safety and security.

The COMCEC Strategy, provides a useful strategic framework for tourism development and tourism cooperation in the Member Countries with its new implementation instruments, namely, Tourism Working Group and Project Cycle Management mechanism.

To stimulate and promote tourism for economic growth, social progress and environmental sustainability, Member Countries should give priority to tourism sector in their national policies, foster competitive and responsible business models and practices in tourism, increase cooperation between the public and private sectors and enhance international cooperation including cooperation with the member countries.

## APPENDIX:

Table 1: Tourist Arrivals in the OIC Member Countries (2008-2017)

UNWTO TOURIST ARRIVALS - COMCEC	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>World (Millions)</b>	<b>929</b>	<b>894</b>	<b>952</b>	<b>995</b>	<b>1.035</b>	<b>1.087</b>	<b>1.134</b>	<b>1.186</b>	<b>1.239</b>	<b>1.323</b>
<b>Afghanistan</b>										
<b>Albania</b>	1.420	1.792	2.417	2.932	3.156	2.857	3.341	3.784	4.070	4.643
<b>Algeria</b>	1.772	1.912	2.070	2.395	2.634	2.733	2.301	1.710	2.039	2.541
<b>Azerbaijan</b>	1.043	1.005	1.963	2.239	1.986	2.130	2.160	1.922	2.045	2.454
<b>Bahrain</b>	-	-	955	-	1.014	1.069	838	1.200	3.990	4.372
<b>Bangladesh</b>	467	267	303	-	125	148	125	-	-	-
<b>Benin</b>	188	190	199	209	220	231	<b>242</b>	<b>255</b>	<b>267</b>	-
<b>Brunei Darussalam</b>	226	157	214	242	209	225	201	218	219	259
<b>Burkina Faso</b>	272	269	274	238	237	218	191	<b>163</b>	152	-
<b>Cameroon</b>	298	498	573	604	812	912	-	-	-	-
<b>Chad</b>	22	70	71	77	86	100	122	120	-	-
<b>Comoros</b>	-	11	15	19	-	-	-	24	27	28
<b>Cote d'Ivoire</b>	-	-	252	270	289	380	471	1.441	1.583	-
<b>Djibouti</b>	53	-	51	-	60	63	-	-	-	-
<b>Egypt</b>	12.296	11.914	14.051	9.497	11.196	9.174	9.628	9.139	5.258	8.157
<b>Gabon</b>	358	186	-	-	-	-	-	-	-	-
<b>Gambia</b>	147	142	91	106	157	171	156	135	161	-
<b>Guinea</b>	-	-	12	-	96	56	33	35	60	-
<b>Guinea-Bissau</b>	-	-	22	-	-	36	36	44	-	-
<b>Guyana</b>	130	141	150	157	177	200	206	207	235	247
<b>Indonesia</b>	6.234	6.324	7.003	7.650	8.044	8.802	9.435	<b>9.963</b>	11.072	-
<b>Iran</b>	2.034	-	2.938	3.354	3.834	4.769	4.967	5.237	4.942	4.867
<b>Iraq</b>	864	1.262	1.518	-	1.111	892	-	-	-	-
<b>Jordan</b>	3.729	3.789	4.207	3.960	4.162	3.945	3.990	3.763	3.567	3.844
<b>Kazakhstan</b>	3.447	3.118	3.393	4.093	4.807	4.926	4.560	-	-	-
<b>Kuwait</b>	259	297	207	269	300	307	198	<b>182</b>	203	-
<b>Kyrgyz Republic</b>	2.435	2.147	1.316	3.114	2.406	3.076	2.849	<b>3.051</b>	2.930	-
<b>Lebanon</b>	1.333	1.844	2.168	1.655	1.366	1.274	1.355	1.518	1.688	1.857
<b>Libya</b>	34	-	-	-	-	-	-	-	34	-
<b>Malaysia</b>	22.052	23.646	24.577	24.714	25.033	25.715	27.437	25.721	26.757	25.948
<b>Maldives</b>	683	65	792	931	958	1.125	1.205	1.234	1.286	1.390
<b>Mali</b>	190	160	169	160	134	142	168	159	173	-
<b>Mauritania</b>	-	-	-	-	-	-	-	-	-	-
<b>Morocco</b>	7.879	8.341	9.288	9.342	9.375	10.046	10.283	10.177	10.332	11.314
<b>Mozambique</b>	1.815	1.461	1.718	1.902	2.113	1.886	1.661	1.552	1.639	-
<b>Niger</b>	73	66	74	82	94	123	135	135	152	-
<b>Nigeria</b>	1.313	1.414	1.555	715	486	600	-	1.255	1.889	-
<b>Oman</b>	1.378	1.524	1.446	1.343	1.438	1.392	<b>1.611</b>	<b>1.897</b>	<b>2.292</b>	-
<b>Pakistan</b>	823	855	907	1.161	966	565	<b>965</b>	-	-	-
<b>Palestine</b>	387	396	522	449	490	545	556	432	400	503
<b>Qatar</b>	1.405	1.659	1.519	2.527	2.346	2.611	2.826	2.930	2.938	2.256
<b>Saudi Arabia</b>	14.757	10.897	10.850	17.498	14.276	15.772	18.260	17.994	18.044	16.109
<b>Senegal</b>	-	810	900	1.001	962	1.063	836	1.007	-	-
<b>Sierra Leone</b>	36	37	39	52	60	81	44	24	54	-
<b>Somalia</b>	-	-	-	-	-	-	-	-	-	-
<b>Sudan</b>	440	420	495	536	575	591	684	<b>741</b>	800	-
<b>Suriname</b>	151	150	204	220	240	249	252	228	257	278
<b>Syria</b>	5.430	6.092	8.546	5.070	-	-	-	-	-	-
<b>Tajikistan</b>	325	-	160	-	244	208	213	414	-	-
<b>Togo</b>	74	150	202	300	235	327	282	273	338	496
<b>Tunisia</b>	7.050	6.901	7.828	4.782	5.950	7.352	7.163	5.163	5.724	7.052
<b>Turkey</b>	24994	25506	31.364	34.654	35.698	37.795	39.811	39.478	30.289	37.601
<b>Turkmenistan</b>	-	-	-	-	-	-	-	-	8	-
<b>Uganda</b>	844	807	946	1.151	1.197	1.206	1.266	1.303	1.323	-
<b>UAE (Dubai)</b>	-	6.812	7.432	8.129	8.977	9.990	<b>13.200</b>	<b>14.200</b>	<b>14.910</b>	-
<b>Uzbekistan</b>	1.069	1.298	1.327	1.460	-	1.969	-	-	1969	-
<b>Yemen</b>	404	434	1.025	829	874	990	1.018	367	367	-

Source: UNWTO Tourism Highlights 2006, 2009 and 2017 Editions.

**Table 2: Tourism Receipts in the OIC Member Countries (2008-2017) (US \$ Millions)**

UNWTO TOURISM RECEIPTS - COMCEC	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>World (US \$ Billion)</b>	<b>941</b>	<b>853</b>	<b>928</b>	<b>1.030</b>	<b>1.075</b>	<b>1.159</b>	<b>1.309</b>	<b>1.260</b>	<b>1.239</b>	<b>1.332</b>
Afghanistan	-	-	55	71	56	56	84	82	49	-
Albania	1.849	1.816	1.626	1.628	1.464	1.473	1.705	1.500	1.691	1.929
Algeria	474	267	220	209	217	250	258	308	209	-
Azerbaijan	382	353	621	1.287	2.433	2.365	2.432	2.309	2.714	3.012
Bahrain	1.166	1.118	1.362	1.035	1.051	1.165	1.197	-	3846	-
Bangladesh	75	70	81	87	105	129	153	148	213	337
Benin	236	131	149	187	170	189	151	141	123	-
Brunei Darussalam	242	254	-	-	92	96	79	140	140	-
Burkina Faso	82	64	72	133	84	153	135	109	122	-
Cameroon	167	270	159	409	349	576	595	450	505	-
Chad	-	-	-	-	-	-	-	-	-	-
Comoros	39	32	35	44	39	49	51	40	-	-
Cote d'Ivoire	129	151	201	141	172	181	184	158	-	-
Djibouti	8	16	18	19	21	22	25	31	33	-
Egypt	10.985	10.755	12.528	8.707	9.940	6.047	7.208	6.065	2.645	7.775
Gabon	-	-	-	-	-	-	-	-	-	-
Gambia	80	63	74	83	88	-	107	120	116	-
Guinea	2	3	2	2	1	-	17	23	16	-
Guinea-Bissau	38	-	13	-	7	17	21	17	19	-
Guyana	59	35	80	95	64	77	79	65	104	-
Indonesia	7.375	5.598	6.957	7.952	8.325	9.119	10.261	10.761	11.206	12.520
Iran	2.202	2.012	2.438	2.381	1.114	3.076	3.483	3.868	3.713	-
Iraq	-	-	1.660	1.543	1.634	1.660	2.489	4.060	2.423	-
Jordan	2.943	2.911	3.585	3.425	4.061	4.117	4.375	4.065	4.044	4.639
Kazakhstan	1.012	963	1.005	1.209	1.347	1.522	1.467	1.625	1.549	1.781
Kuwait	610	354	290	319	425	298	369	499	599	313
Kyrgyz Republic	569	459	284	640	698	530	423	426	432	-
Lebanon	7.192	6.744	7.861	6.545	6.327	6.492	6.523	6.857	6.857	7.044
Libya	99	50	60	-	-	-	-	-	-	-
Malaysia	15.277	15.772	18.276	18.259	20.250	21.496	22.595	17.584	18.075	18.323
Maldives	664	608	1.713	1.868	1.951	2.333	2.696	2.567	2.506	2.742
Mali	286	192	283	267	142	178	212	186	200	-
Mauritania	-	-	-	-	48	41	37	29	30	-
Morocco	7.202	6.557	6.703	7.281	6.703	6.854	7.056	6.003	6.549	7.417
Mozambique	213	196	197	231	250	199	207	193	108	151
Niger	86	66	105	96	50	58	90	74	77	-
Nigeria	959	602	576	628	559	542	543	404	1070	2549
Oman	804	689	780	996	1.095	1.295	1.376	1.540	1.725	-
Pakistan	245	272	305	373	339	288	283	315	322	352
Palestine	269	410	667	795	581	789	603	452	284	-
Qatar	-	179	584	1.170	2.857	3.456	4.591	5.035	5.411	5.971
Saudi Arabia	9.720	5.995	6.712	8.459	7.432	7.651	8.238	10.130	11.096	12.056
Senegal	637	463	453	468	407	439	423	368	-	-
Sierra Leone	34	25	26	44	42	66	35	23	41	-
Somalia	-	-	-	-	-	-	-	-	-	-
Sudan	331	299	94	185	772	773	967	949	1.009	1.029
Suriname	83	64	61	61	71	84	95	88	65	46
Syria	3176	3757	6190	1753	-	-	-	-	-	-
Tajikistan**	24	20	2	-	-	-	1	1	4	8
Togo	44	68	66	79	111	125	125	114	-	-
Tunisia	2.932	2.773	2.645	1.914	2.227	2.191	2.359	1.354	1.236	1.299
Turkey	21.951	21.250	22.585	25.054	25.653	27.997	29.552	26.616	18.743	22.478
Turkmenistan	-	-	-	-	-	-	-	-	-	-
Uganda	498	667	784	960	1.135	1.334	791	1.149	1.060	918
UAE	7.162	7.352	8.577	9.204	10.380	11.564	13.969	16.038	19.496	-
Uzbekistan	64	99	121	-	-	-	-	-	-	-
Yemen	453	486	1.161	780	849	940	1.026	100	-	-

Source: UNWTO Tourism Highlights 2006, 2009 and 2018 Editions.

**Table 3: Travel & Tourism Economic Impact for OIC Member Countries (2017)**

COMCEC	The direct contribution of Travel & Tourism to GDP %	The direct contribution of Travel & Tourism to Employment (jobs) %	Total contribution of Travel & Tourism to Employment (jobs) %
Afghanistan			
Albania	8.5	7.7	24.1
Algeria	3.3	2.8	6.0
Azerbaijan	4.2	3.8	13.2
Bahrain	4.2	4.0	9.4
Bangladesh	2.2	1.8	3.8
Benin	2.2	1.8	4.8
Brunei Darussalam			
Burkina Faso	1.6	1.4	3.3
Cameroon	3.2	2.6	6.0
Chad	1.3	0.9	3.5
Comoros	4.4	3.7	8.4
Cote d'Ivoire			
Djibouti			
Egypt	5.6	3.9	8.5
Gabon	1.0	0.9	2.6
Gambia	8.2	6.7	17.2
Guinea	2.5	1.9	4.3
Guinea-Bissau			
Guyana	2.6	2.9	7.4
Indonesia	1.9	3.7	10.0
Iran	2.8	2.1	6.1
Iraq	3.0	2.1	6.7
Jordan	5.0	7.3	19.2
Kazakhstan	1.9	2.1	5.9
Kuwait	2.8	2.6	5.5
Kyrgyz Republic	1.4	1.4	3.7
Lebanon	6.5	6.4	17.9
Libya	2.5	2.0	5.0
Malaysia	4.8	4.6	11.8
Maldives	39.6	16.0	37.4
Mali	3.8	2.1	5.8
Mauritania			
Morocco	8.2	7.1	16.4
Mozambique	3.4	2.8	7.9
Niger	2.1	1.7	4.2
Nigeria	1.9	1.8	4.8
Oman	3.2	3.4	6.6
Pakistan	2.9	2.5	6.5
Palestine			
Qatar	3.3	4.9	9.2
Saudi Arabia	3.4	5.3	9.1
Senegal	4.5	3.8	9.1
Sierra Leone	1.7	1.5	3.7
Somalia			
Sudan	2.3	1.7	4.3
Suriname	1.2	1.2	2.5
Syria	6.2	3.6	8.9
Tajikistan	3.2	2.9	7.7
Togo	4.1	3.3	7.4
Tunisia	6.9	6.3	13.0
Turkey	3.8	1.6	7.4
Turkmenistan			
Uganda	2.9	2.4	6.3
United Arab Emirates	5.1	4.9	9.5
Uzbekistan	0.9	0.8	2.4
Yemen	2.3	1.2	3.3

Source: WTTC, Travel &amp; Tourism Economic Impact 2018, Country Reports, 2017

**Table 4: Classification of the OIC Member Countries by Region**

OIC-Sub Saharan Africa		OIC-MENA		OIC-Asia	
1.	Burkina Faso	1.	Egypt	1.	Guyana
2.	Somalia	2.	Jordan	2.	Pakistan
3.	Nigeria	3.	Iran	3.	Afghanistan
4.	Mauritania	4.	Bahrain	4.	Kyrgyz Republic
5.	Benin	5.	Morocco	5.	Malaysia
6.	Cameroon	6.	Saudi Arabia	6.	Bangladesh
7.	Chad	7.	Libya	7.	Azerbaijan
8.	Cote d'Ivoire	8.	Algeria	8.	Indonesia
9.	Djibouti	9.	Albania	9.	Kazakhstan
10.	Gabon	10.	Iraq	10.	Maldives
11.	Guinea	11.	Lebanon	11.	Tajikistan
12.	Guinea-Bissau	12.	Tunisia	12.	Turkmenistan
13.	Mali	13.	Turkey	13.	Uzbekistan
14.	Mozambique	14.	Yemen	14.	Brunei Darussalam
15.	Niger	15.	Qatar		
16.	Senegal	16.	Oman		
17.	Sierra Leone	17.	Kuwait		
18.	The Gambia	18.	Palestine		
19.	Sudan	19.	United Arab Emirates		
20.	Suriname				
21.	Togo				
22.	Uganda				
23.	Comoros				

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