



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

COMCEC

COMCEC TOURISM OUTLOOK 2022



COMCEC COORDINATION OFFICE
October 2022



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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 2022 is prepared by Dr. Gürel ÇETİN, 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 about 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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Table of Contents

1	Introduction.....	1
2	The Importance of Tourism for Development	2
3	Overview of International Tourism in the World	11
	Key Tourism Trends in the World.....	11
	International Tourist Arrivals	17
	International Tourism Receipts	21
4	International Tourism in the OIC Member Countries	24
5	Sustainable Human Resources Management in Tourism in the OIC Member Countries ...	38
6	Importance of Tourism Cooperation in the Member Countries	39
	6.1 Tourism Potentials & Obstacles Faced in the Tourism Development and Cooperation in the Member Countries.....	39
	6.2 Tourism Cooperation under the COMCEC Umbrella.....	41
7	Conclusion	50
	APPENDIX:	53
	Table 1: Tourist Arrivals in the OIC Member Countries (2009-2020).....	53
	Table 2: Tourism Receipts in the OIC Member Countries (2009-2020) (US \$ Millions)	54
	Table 3: Classification of the OIC Member Countries by Region	55
	REFERENCES:	56

List of Tables

Table 1. Government Interventions to Mitigate Covid-19	5
Table 2. International Tourism Arrivals and Tourism Receipts	18
Table 3. International Tourism Arrivals by Region (Millions)	19
Table 4. International Tourism Receipts by Region (Billion \$)	23

List of Figures

Figure 1. Share of Tourism in Global GDP and Employment.....	6
Figure 2. Projected Contribution of Tourism to Global Employment and GDP	6
Figure 3. Domestic vs International and Leisure vs Business Tourism amid Covid-19.....	7
Figure 4. Why Tourism Matters?.....	8
Figure 5. Factors Effecting Recovery of International Tourism.....	12
Figure 6. Recovery Expectations of Tourism Professionals.....	12
Figure 7. Tourism Megatrends	14
Figure 8. Internet Information Sources	16
Figure 9. International Arrivals Monthly Change Based on 2019	17
Figure 10. International Tourist Arrivals and Percentage Change (2000-2021).....	19
Figure 11. Tourist Arrivals by Region (2019-2021).....	20
Figure 12. International Tourism Receipts and Percentage Change (2000-2021)	22
Figure 13. Tourism Receipts by Region (2019-2021).....	23
Figure 14. Impact of Covid-19 on Performance Indicators (%)	25
Figure 15. Tourism Industry Covid-19 Mitigation Strategies in OIC.....	26
Figure 16. Importance of Government Mitigation Strategies.....	27
Figure 17. Tourist Arrivals in the OIC Member Countries	33
Figure 18. Receipts in the OIC Member Countries.....	34
Figure 19. Tourist Arrivals in the OIC Sub-Regions (Millions).....	34
Figure 20. Tourism Receipts in the OIC Sub-Regions	35
Figure 21. Top 10 OIC Tourism Destinations in Arrivals (Thousand) (2021)	36
Figure 22. Top 10 OIC Tourism Destinations in Receipts in 2018 (Million US \$).....	36
Figure 23. Tourism Opportunities in the Member Countries.....	40
Figure 24. Challenges Affecting Tourism Performance in the Member Countries	41
Figure 25. Output Areas in the Tourism Section of the COMCEC Strategy	43

1 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 even after the global pandemic 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 thanks to 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 2022 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 amid Covid-19 and some comparisons regarding competitiveness of the OIC Member States were analyzed and discussed.

2 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 on other industries and by providing the means 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 established tourism destinations 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 and disadvantaged groups.

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 10.3% in 2019 creating 9.6 billion USD with direct, indirect and induced effects. However, because of the pandemic the total contribution to GDP decreased by 4.3 billion USD, creating only 5.3% of global GDP in 2020. With the recovery in 2021 tourism represented 6.1% of World's GDP at 5.8 billion USD (WTTC, 2022). From 2022 onwards the tourism volume is estimated to reach its previous momentum in 2019. The forecasted growth of tourism's contribution to GDP is around 3.7% on the average for the next eight years to 12% of GDP in 2029. This is much faster than the growth in global economy which was around 3.2% in 2018. With direct and indirect effects of more than 185 supply-side economic activities that have significant connections to tourism are also positively affected.

Yet, there is a wide consensus that the tourism and travel industry is also largely vulnerable to crises regardless of their types. Tourist flows and inherently tourism receipts can be largely affected by a wide range of crises including political tensions, disasters (both man-made and natural), epidemics, and terror attacks. Previous crises in tourism had regional short-term impacts and their global effect on tourism was relatively limited. However, with the impacts of COVID-19 pandemic tourism industry experienced significant declines in 2020 and yet started to recover in 2021. The worldwide tourist arrivals declined by 72.7% from 1,464 million in 2019 to 400 million in 2020, while the tourism receipts declined from USD 1,466 billion in 2019 to USD 533 billion in 2020, corresponding to a decline of 63.8% in constant prices. Parallel to global decline in tourism volume, OIC countries also witnessed a significant decline in tourist arrivals and hosted only 70.4 million international tourists in 2020 compared to 258 million in 2019, corresponding to a decline of 78.7%. Tourism receipts in OIC also declined by 62.9% from 216 billion in 2019 to 77.8 billion in 2020. Overall, the disruption caused by the pandemic in the OIC countries resulted in estimated losses of USD 293 billion in GDP and 8.6 million in employment (SESRIC, 2022).

In response to the crisis and to help the tourism industry survive Covid-19, besides various legislative and operational measures such as safe tourism certifications governments have adopted various interventions ranging from tax holidays, financial incentives, fiscal measures, credit facilities to employment support and demand stimulation. Government responses to the crisis with relevance to the tourism industry might also be classified under direct and indirect interventions. Some of the indirect interventions (e.g., restrictions on mobility, capacity reductions) also created major setbacks for the tourism industry. The direct interventions (e.g. credit facilities) on the other hand targeted to relieve some of the specific stress on the industry (e.g., short-time work compensations, deferrals of payments) and stimulate tourism demand (e.g., holiday subventions to the domestic market, travel bubbles). It should be noted, however, that generic governmental support may be less effective when countries have significant informal economies which is the case for most OIC member countries. Government response strategies might also be viewed as short-term tactical responses (e.g., tax holidays) and long-term strategic responses (e.g., market diversification).

With regard to mitigation strategies by the private sector, businesses within the tourism and hospitality industry seem to adopt different strategies including targeting less risk-averse market segments, enforcing social distancing and capacity restrictions, implementing additional hygiene measures, offering unpaid leave, improving service quality, integrating ICT, reducing prices, limiting services, revisiting cancellation policies, focusing on local markets, creating safety image, extending credits, and postponing maintenance and investments.

It also has become apparent that crises may often give birth to opportunities. In this vein, crises affecting tourism may result in transformations and positive outcomes through the generation of new knowledge, relationships, and policy. Some destinations, for example, have reduced their reliance on key markets, understood their vulnerability, recognized the importance of domestic tourism, increased government support and funding for tourism, invested in destination infrastructure, and developed new products, and tourism-related policies. In the post-Covid-19 era, the tourism industry is likely to experience various transformations such as increased cost per tourist because of social distancing, hygiene measures and other operational costs; reduced capacity, increased competition, utilization of ICT and AI technologies, and image building on safe destination branding. These will be advantages for destinations and tourism business that proactively respond to aforementioned opportunities.

A previous COMCEC report in 2019 addressed crises mitigation strategies of tourism industry based on empirical data collected from 246 tourism industry representatives. These strategies, in order of importance, were related to enhancing cleanliness and hygiene standards, market diversification, creating safety image, enhancing service quality, restructuring debts, and applying for financial support, offering new services, enhancing loyalty programs, enhancing travel insurance policies, increasing marketing efforts, relaxing cancellation policies, focusing on ICT and automation, decreasing costs, postponing investments, investing in employee training, decreasing number of employees, merging with other organizations, investing on corporate social responsibility, decreasing prices, decreasing capacity, and liquidation (COMCEC, 2019).

Besides the industry mitigation strategies, government support and their effectiveness were also explored in the study. Overall, strategies developed by governments to reduce the negative impacts of the Covid-19 pandemic are generally limited to a set of short-term reactions oriented towards helping businesses offset their revenue loss and, in some cases, keeping a foot in the market despite damage. Based on the qualitative content analysis of interviews, government strategies were grouped under five different themes as; Subventions for enhancing demand(i), Financial Support(ii), Support for maintaining and developing workforce(iii), Legislative actions (iv), and Operational support (v). In the order of their importance; Operational support alternatives included vaccination priority of tourism staff, creating safe travel bubbles and tourism corridors, offering medical support services such as PCR tests, organizing the safe travel certificates, controlling for hygiene and capacity restrictions, advisory and information provision services for both tourists and organizations. Legislative Actions included introduction of vaccine passports, government guarantees on loans, delaying refunds to force major cancellations, and introducing holidays insurances.

Tax holidays and discounts for the tourism industry, rent support for buildings and land, deferrals of utility charges such as energy and water, subsidized credits, contributions for digitalization and automation costs, Seat support for flights, Advance public purchase of tourism services such as flights and lodging services, application of a favorable exchange rate policy, contributing to renovation expenses, and accelerated depreciation opportunities were listed as the most important financial support items. Subsidies targeting human resources included salary contributions, wage subsidies, training support for workforce, suspension of layoffs, and reduced social security contributions that aim to protect and develop workforce during the pandemic. Finally government efforts on destination promotion, international lobbying activities and diplomacy, providing holiday credits and vouchers, and extending bank holidays particularly in order to stimulate domestic tourism were listed among government mitigation measures facilitating demand.

The findings of the report allude to a transformative power of the current crisis. This is reflected in two dimensions, namely; alterations in generating markets and changing market structure and tourist motivations. Domestic tourism, Middle East & Gulf and CIS countries were identified as more crises resilient markets while health tourism and nature-based tourism were listed as tourist products with higher immunity to the pandemic. Increased importance of customized services, pandemic hygiene standards becoming permanent, increased popularity of travel insurance systems, increases in per person costs, and increased importance of brand image were rated as the prevalent transformations in tourism operations. The study also identifies the key characteristics of tourism and hospitality businesses that are likely to survive crises. These organizations are likely to offer quality service, utilize information and communication technology, differentiate based on quality rather than price, operate under a strong brand, offer diverse products and services, cater domestic tourists, and with higher share of paid in capital (COMCEC, 2019).



Table 1. Government Interventions to Mitigate Covid-19

Type of Response	Indirect	Direct
Short-term	<p>Tax, rental and fee reductions, holidays and deferrals.</p> <p>Grants, credits, cash-flow support.</p> <p>Reduced interest rates.</p> <p>Government guarantees on loans.</p> <p>Liquidity supports.</p> <p>Wage subsidies, salary contributions, compensations.</p> <p>Travel bans, social distance measures and quarantines.</p> <p>Enhanced centralized medical services, contact tracing.</p> <p>Provision of protective supplies (sanitizers, gloves, masks etc.)</p>	<p>Holiday vouchers and favorable interest holiday loans.</p> <p>Extended bank holidays for citizens.</p> <p>Certifications.</p> <p>Holiday insurances.</p> <p>Providing emergency medical support.</p> <p>Border scans and capacity audits.</p> <p>Health protocols for safe travel.</p> <p>Safe labels for the sector.</p> <p>Cancellation refund delays.</p> <p>Disinfection and sanitation of facilities.</p> <p>Information provision.</p> <p>Organizing FAM trips.</p> <p>Reducing tax rates on tourism services.</p> <p>Travel bubbles with similar risk countries.</p> <p>Establishing recovery committees.</p>
Long-term	<p>Hygiene standards.</p> <p>Enhanced SME support.</p> <p>Lifting travel restrictions.</p>	<p>Market diversification.</p> <p>Marketing communications and image creation on safe destination.</p> <p>Restoring traveler confidence.</p> <p>Strengthening domestic tourism and family tourism demand.</p> <p>Sustainable tourism measures.</p>

Source: COMCEC (2019)

Tourism provided 123 million direct (3.8% of total employment) and 196 million indirect and induced jobs with a total of 319 million (10% of total employment) jobs in 2018 and 333 million jobs in 2019 making on in every 10 jobs globally. 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. Tourism accounted for more than 10% of global GDP before the pandemic. During the pandemic however, 62 million jobs were lost in tourism representing 19% of tourism employees during 2020. With the recovery in 2021 tourism industry created 18.2 million new jobs, accounting for one in every eleven jobs (WTTC, 2022).

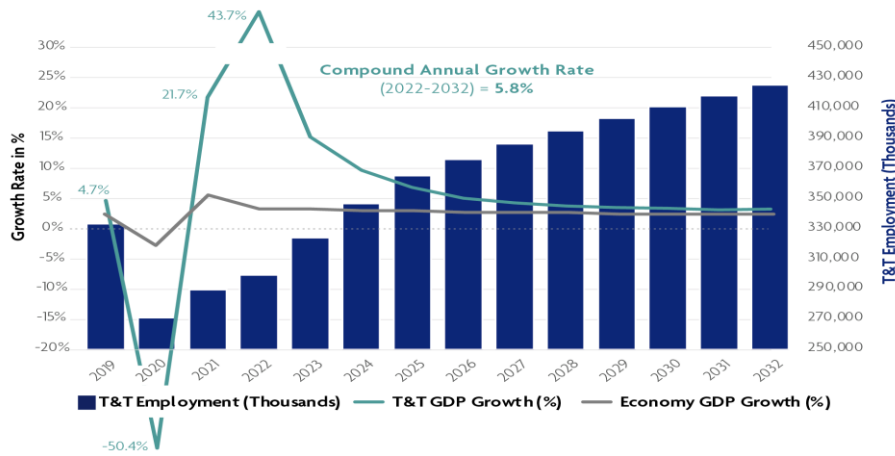
Figure 1. Share of Tourism in Global GDP and Employment

Global Data				
 Total GDP contribution:			 Total Travel & Tourism jobs:	
2019	10.3% USD 9,630 BN	Travel & Tourism GDP change:	333 MN = 1 in 10 jobs	Change in Jobs ² :
2020	5.3% USD 4,775 BN	-50.4% =USD -4,855 BN (Economy GDP = -3.3%)	271 MN = 1 in 12 jobs	-62.0MN = -18.6%
2021	6.1% USD 5,812 BN	+21.7% =USD 1,038 BN (Economy GDP = 5.8%)	289 MN = 1 in 11 jobs	+18.2MN = + 6.7%

Source: WTTC, 2022.

During the pandemic, most human resources left tourism for other industries particularly for logistics and retail. This created major staff shortages in tourism during the recovery started in 2022 as recruitment new staff takes more time than laying off existing personnel. For example, tourism industry is unable to fill 412.000 positions in USA and EU is experiencing 1.2 million shortages in human resources in tourism. Particularly aviation industry in tourism had to decrease their capacities because of staff shortages. Foreseeing this challenge in advance, COMCEC has addressed “Sustainable Human Resource Management in Tourism” during its 19th Meeting of Tourism working group in 2022. Before the five years before the pandemic tourism created one in every four jobs between 2014-2019, making 1/10 of global employment, 62 million jobs were lost during 2020, despite the recovery in 2021 tourism industry employed only 18 million new staff representing an increase of almost 7% on previous year. For the next ten years between 2022 to 2032, however tourism is expected to grow on the average of 5.8% much larger than the global average GDP growth estimated at 2.7%, creating 126 million new jobs (WTTC, 2022).

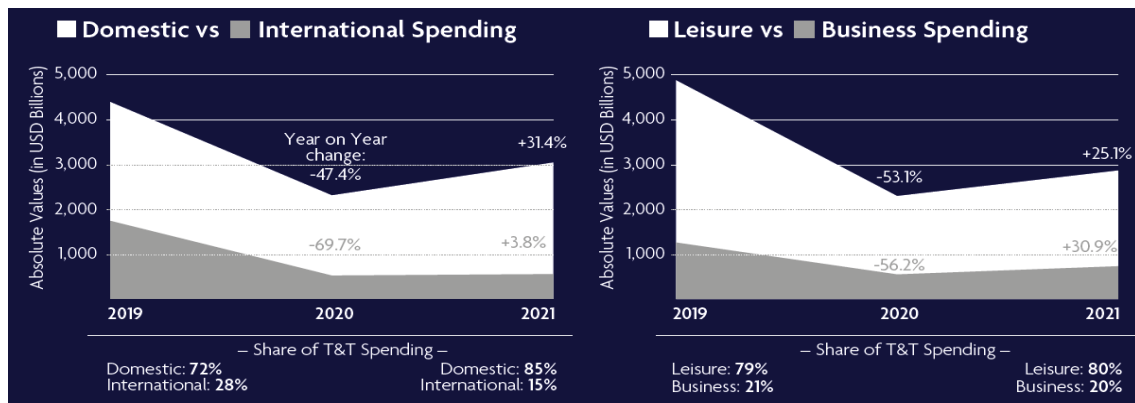
Figure 2. Projected Contribution of Tourism to Global Employment and GDP



Source: WTTC, 2022

Before COVID-19, the growth rate of the global Travel & Tourism sector outpaced the growth of the global economy for nine consecutive years. After a 50.4% decrease in the contribution of tourism to the global economy, Travel & Tourism recovered by 21.7% in 2021 – shown in figure 2. The global economy on the other hand bounced back by only 7%. Despite domestic spending in tourism recovered strongly – by 31.4% globally –international visitor spending recovered by only 4% as travel restrictions for foreign visitors remained in place across many countries particularly in Asia. As a result, domestic spending’s share of total Travel & Tourism spending increased from 72% in 2019 to 85% in 2021. Business travel spending and leisure tavel spending grew at 30.9% and 25.1% respectively (WTTC, 2022).

Figure 3. Domestic vs International and Leisure vs Business Tourism amid Covid-19



Source : WWTC, 2022

According to the UNWTO, total exports earnings (including passenger transport) generated by international tourism in 2018 reached US\$ 1.7 trillion or US\$ 5 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 29% 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.

Figure 4. Why Tourism Matters?



Source: UNWTO, Tourism Highlights 2016 Edition.

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 operate in the industry 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 impact 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, finance and various 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 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 facilitate a fairer wealth distribution.

Considering the scale, rate of growth and the multiplier effect it creates, local economies are increasingly becoming more dependent on tourism receipts. Yet, tourism is also among the most vulnerable industries affected by various factors other than the state of the local economy. Numerous external issues; political events, natural disasters, epidemics, accidents, terror and so on also affect tourist flows to a great extent. Because of its international nature, the situation in tourist generating countries also affects a destination's tourist volume that further complicates managing and forecasting demand.

During recent years, the tourism sector has been facing significant crisis-driven challenges putting risk and crisis management at the forefront of the industry's agenda. It can be noted that an increasing number of disasters and crises affect the tourism industry, ranging from natural to human-driven incidents. With the globalization of the world's economy, almost every country is being affected by these crises or disasters. Few would disagree that crises occurring in one single place of the world can potentially affect tourism activities in broader areas or even worldwide.

Considering its enormous speed and global impact, Covid-19 is perhaps the most serious crisis the tourism industry has ever faced. The immediate response to the pandemic by several countries has been through lockdown orders and limiting human mobility. This has resulted in large-scale economic downturns that affected tourism in both developed and developing countries. To illustrate its volume, Covid-19 is estimated to have a seven-time larger impact on tourism than the 2008 Financial Crisis. This effect is expected to result in a decrease of up to 78% in global tourism volume with the tourism industry being expected to recover to 2019 pre-crisis levels not before 2023.

3 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 such as epidemics and natural disasters; tourism has always bounced back, proving its resilience and capacity to recover. During 2020 and 2021 tourism industry experienced an unprecedented decline because of the pandemic. Yet early signs in 2022 display a promising recovery. 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 (Tourism Towards 2030, 2012).

The share of emerging economies in the international tourism market is also increasing. Yet tourism industry is facing several other crises. Increasing energy prices, large scale international political and armed conflicts, and decrease in business travel triggered by the Pandemic and new technologies are expected to slow down growth in tourism volume (Goktepe and Cetin, 2021).

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 destinations. 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 peace, intercultural communication, 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 until 2030 (Tourism Towards 2030, 2012). Particularly the energy crises in 2022 after the pandemic had negative impacts on tourism. Recent developments and investment in alternative energy systems might however reverse this trend. There are also other challenges

affecting the global tourism such as climate change, digitalization, Ukrainian war and other political conflicts.

Figure 5. Factors Effecting Recovery of International Tourism

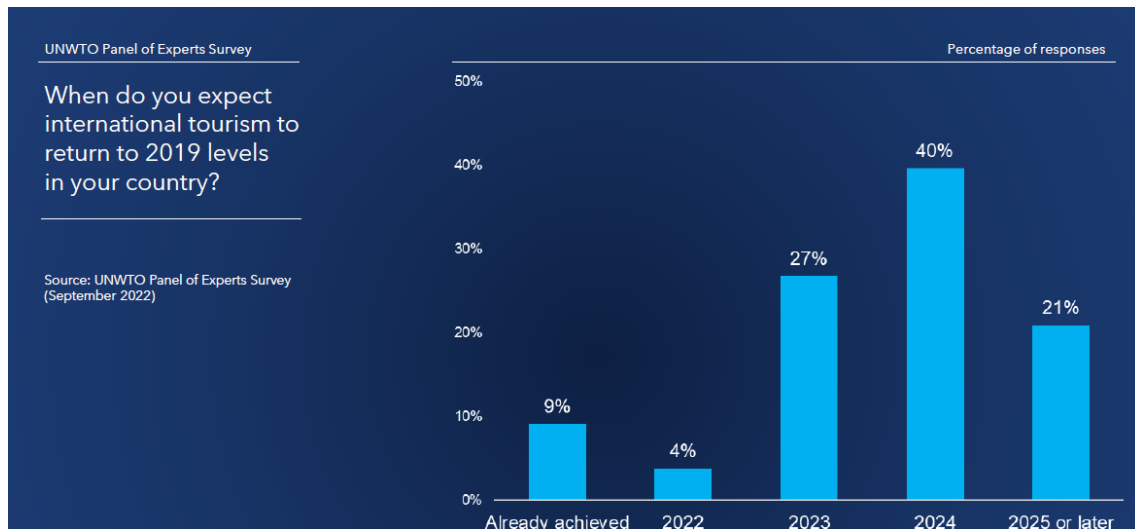


Source: UNWTO, 2022c

In terms of the economic environment, macroeconomic challenges, caused by the surge in energy prices, increase in inflation and interest rates, high debt volumes, and the continued disruption in supply chains bring additional pressure on the effective recovery of international tourism after the pandemic in 2022 and is expected to extend to 2023. In particular, more recently, the crisis between Russia and Ukraine has created a new challenge in the tourism market that could have significant impacts not only in Europe but also in other regions of the world due to the increased energy prices, as well as various travel restrictions and economic sanctions imposed by a set of countries (SESRI, 2021). UNWTO (2022c) identified additional challenges as economic environment, higher costs, flight delays, and staff shortages. These are rated by industry professionals for 2022 season and displayed in figure 3.1.

After the unprecedented drop of 2020 and 2021, international tourism is expected to continue its gradual recovery in 2022. Increasing number of destinations were easing or lifting travel restrictions, which contributes to unleashing the pent-up demand (UNWTO, 2022a). As of September 2022, 86 countries had no Covid-19 related restrictions. Tourism volume during the first seven months of 2022 reached 57% of pre-pandemic levels. Compared to the same period in 2021 international tourism arrivals almost tripled from 175 million to 474 million. Europe and Middle-East are leading recovery by reaching around 75% of their pre-pandemic arrivals in 2019 (UNWTO, 2022b). Yet most experts still believe full recovery to 2019 numbers is only possible after 2024 as displayed in figure 3.2.

Figure 6. Recovery Expectations of Tourism Professionals



Source: UNWTO, 2022c

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:

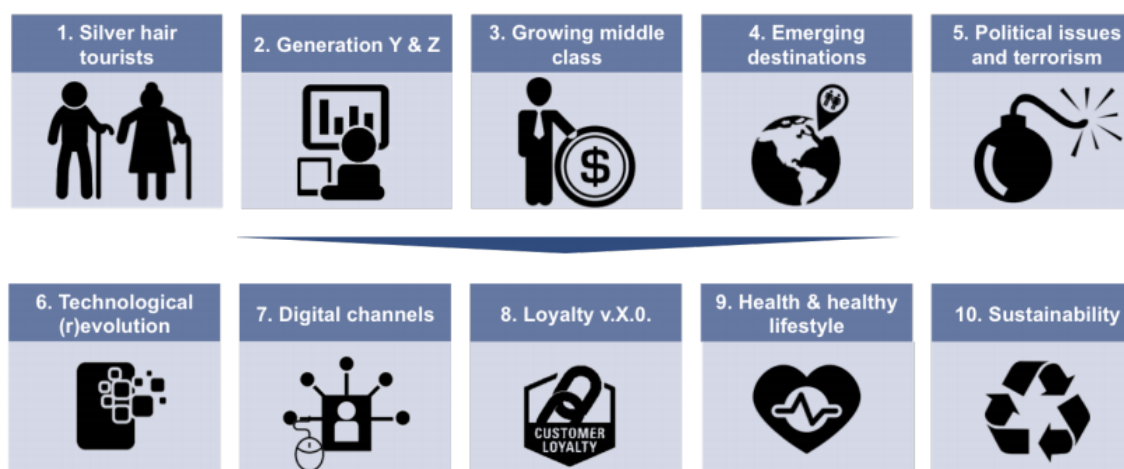
- Long-haul travel and overseas travel will increase and new destinations in relevant regions will gain importance.
- Electronic media (interactive maps, Internet, web sites, etc.) will be increasingly more important for choosing destinations and making reservations.
- In line with the increasing education and welfare level of individuals, the number of experienced traveler groups will increase.
- Concerns about health, safety and security will remain an important issue driving demand.
- 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 weekly working hours 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 promotions addressed to consumers for a sustainable and balanced development of tourism will be stronger.
- Maintaining the destinations tourism development and preventing overtourism will be a priority.
- Destination management will be decentralized and will be based on travel motivations rather than geographical regions.

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 7. 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).

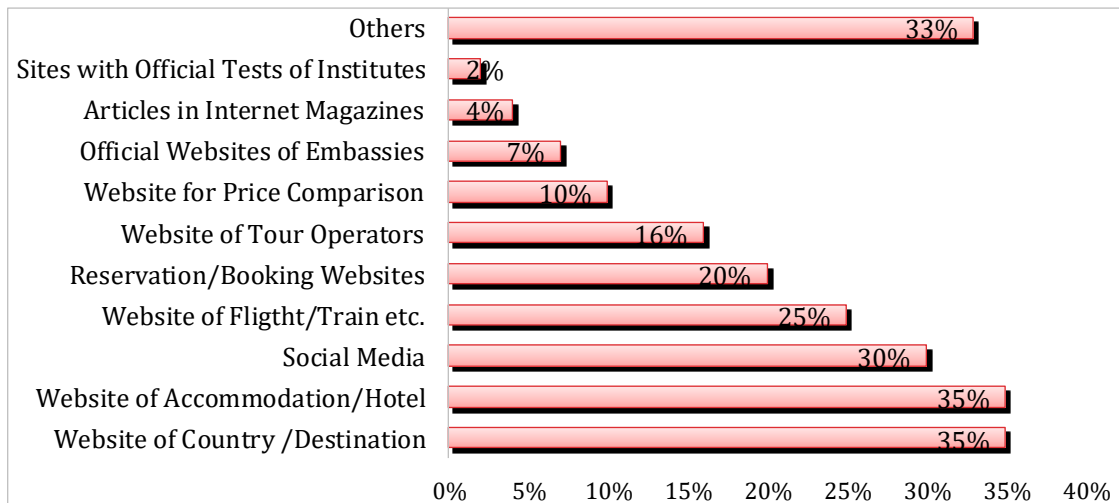
The weight of emerging destinations in the international tourism market is increasing. According to UNWTO; by 2030, 58% of international arrivals will be to the emerging destinations. With the impacts of pandemic following a period of lockdowns and isolation, travellers tend to travel to less crowded and even unfamiliar destinations. Indeed, there has been increased interest in exploring secondary destinations and nature. During this period, travellers have become more committed to sustainability, which in turn is affecting their travel choices. The lockdowns have also shone a brighter light on wellness and overall health, driving more consumers to seek out further wellness experiences (WTTC, 2022).

In 2021, influenced by international travel restrictions, domestic rediscovery and national tourism became a trend. With remote working possibilities introduced during the pandemic, a large and lucrative market of digital nomads emerge, and concept of a staycation led to creation of workcations and increased stay in destinations. Although domestic travel has been a key market during the recovery, the full recovery of the global tourism will require the full return of international travel. Starting with domestic travel leading the recovery and younger generations being the first to travel again, workcations and longer average stays, relaxed cancellation procedures, and enhanced health & hygiene measures will continue to transform tourism in the post-Covid era (WTTC, 2022)

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 various threats to the future of tourism in any destination as well as potential epidemics. 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 of such crises 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 8. Internet Information Sources



Source: ITB World Travel Trends Report 2015-2016

International travellers 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 digitalization of 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 amid Covid-19 and tourism sector will offer products and services accordingly. The sharing economy has shown incremental growth in recent years and is forecast to reach USD 335 billion by 2025, according to projections. 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).

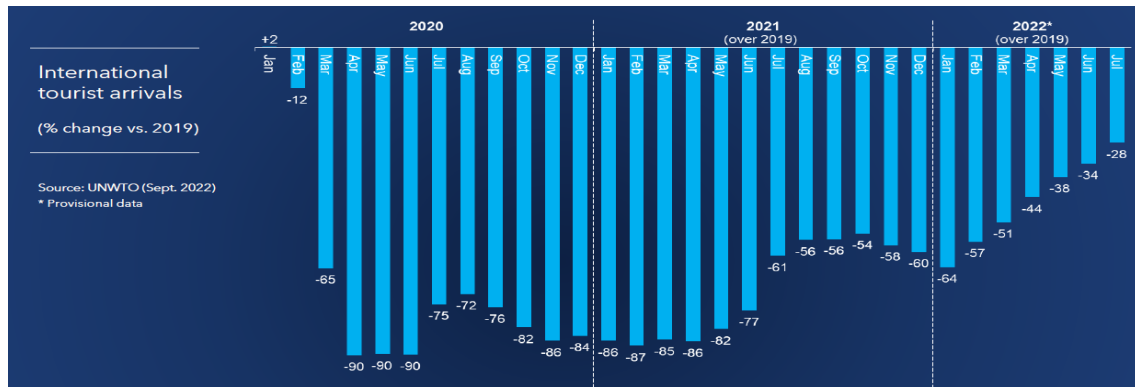
Economic, social and environmental costs and benefits have to be balanced in order to ensure the long-term sustainable development of tourism. Sustainable tourism development requires the participation of all relevant stakeholders at the destination level including and engaging particularly the locals.

International Tourist Arrivals

According to the UNWTO (2019a), international tourist arrivals grew by 5% in 2018, and reached 1.4 billion tourists. 1.4 billion was the 2020 target and thus realized two years in advance. Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 529 million in 1995 and 1.4 billion in 2018 (UNWTO, 2019a). 2018 was the seventh 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 until 2020 when the Covid-19 pandemic spread globally. Increase in energy prices, international crises (e.g. Ukraine vs Russia, Azerbaijan vs Armenia), and inflation are other recent developments affecting demand in global tourism.

Fortunately, the pent up demand started to emerge and tourist arrivals began to recover from the second half of 2021. International arrivals almost tripled in the first seven months of 2022 compared to 2021. As displayed in figure 9 there is a sharp recovery towards 2019 numbers (UNWTO, 2022c).

Figure 9. International Arrivals Monthly Change Based on 2019



After a sharp decline in 2020 by 72% in arrivals and 63% in receipts both of these indicators started to recover in 2021. However, global tourism volume and receipts are still well below 2019 numbers.

Table 2. International Tourism Arrivals and Tourism Receipts

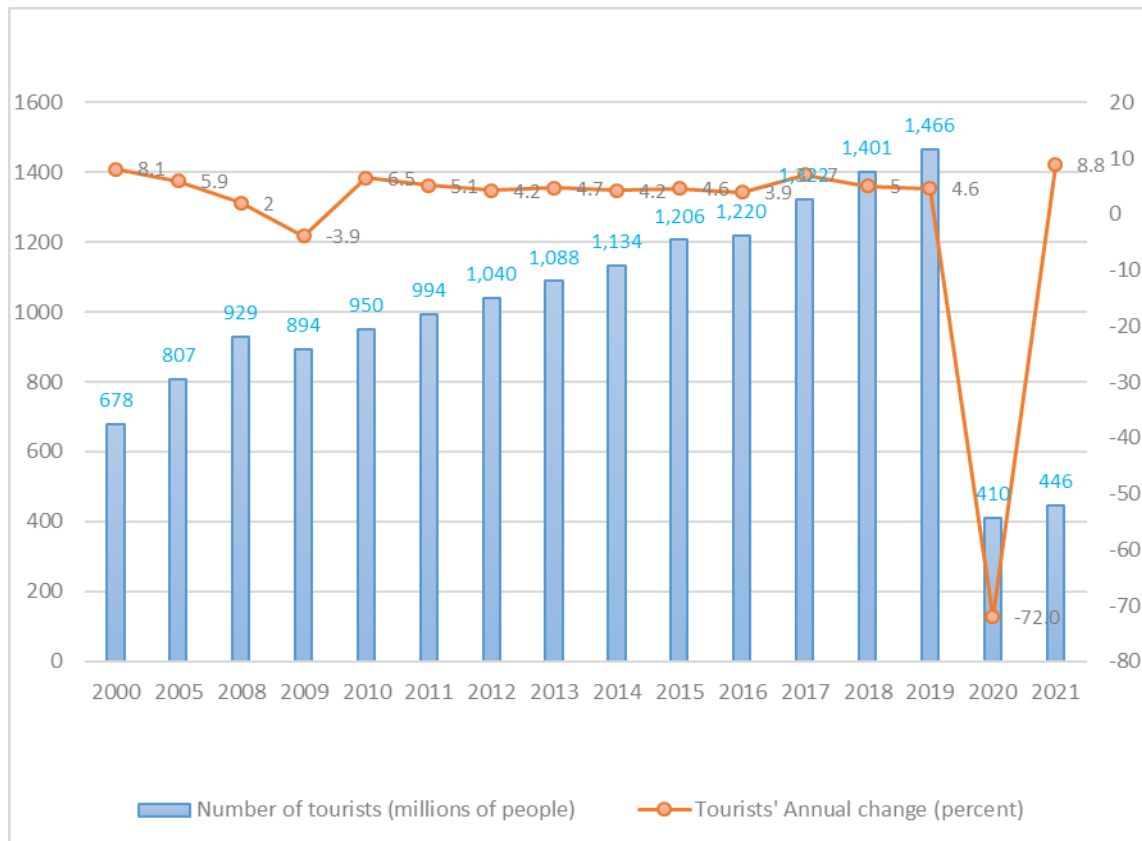
	2005	2010	2015	2019	2020	2021
Number of tourists (millions of people)	809	953	1.206	1,466	410	446
Annual change (percent)	5,9	6,5	4,5	4.6	-72.0	8.8
Tourism receipts (billion dollars)	701	961	1.196	1483.0	548.0	621.0
Annual change (percent)	-	11,7	-4,5	2.2	-63.0	13.3

Source: UNWTO, 2022c

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. However, this trend was also effected by Covid-19 and most emerging destinations were negatively affected and lost their share to established destinations particularly in Europe and North America.

In 2018, international tourist arrivals to advanced economies were 777 million, while it was 689 million for emerging economies. However, with the pandemic advanced destinations increased their share to 54%, advanced economies lost less of their market share in 2020 and recovered better in 2021 than emerging destinations. 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, 2018 and 2019 emerging destinations performed well increasing their share to up to 47%.

Figure 10. International Tourist Arrivals and Percentage Change (2000-2021)



Source: UNWTO, 2022c

Tourism arrivals have experienced a steady growth of 4.4% on the average between 2000-2019 reaching almost 1.5 billion international arrivals. Growing purchasing power, relative safety, increased air connectivity, more affordable travel and visa relaxation arrangements were major reasons of the growth. Yet the pandemic resulted a sharp decline of 72% in 2020. Recovery started in 2021 with an almost 9% increase in arrivals compared to 2020. However, compared to 2019 the arrivals are still less than 1/3 of the pre-pandemic volume.

Table 3. International Tourism Arrivals by Region (Millions)

Tourism Arrivals	2015	2019	2020	2021	Share (%)
World	1,206	1,466	410	446	100
Europe	612	746	242	303	68
Asia & Pacific	283	360	59	21	5
Americas	193	219	70	82	18
Africa	53	68	19	19	4

Middle East	65	73	20	21	5
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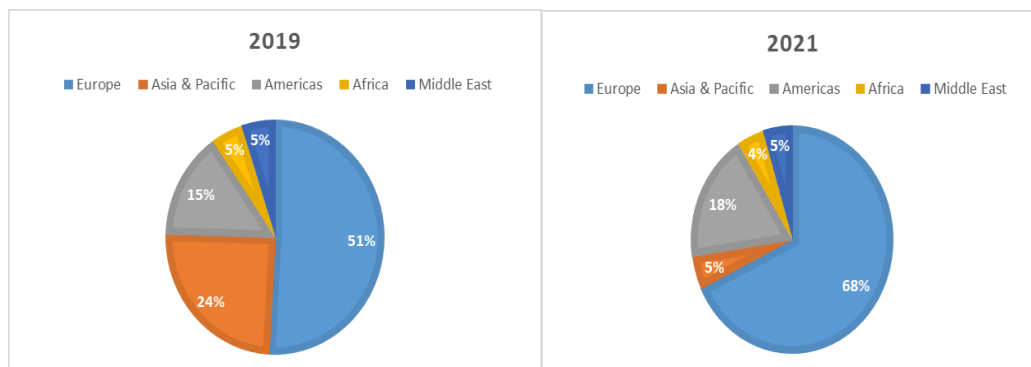
Source: UNWTO, 2022c

According to the Table 3.2, Europe is still leading global tourism arrivals by 68%, while Americas had the second largest share. The rest of tourism volume were shared Asia and the Pacific (5%), Middle East (5%), and Africa (4%). All regions enjoyed growth in 2021 based on 2020 arrivals except Asia & Pacific which continued to strict Covid-19 measures in 2021 as well. In 2021, Europe hosted 303 million of 446 million international tourists. Hence increased their share from 50% of the market to 68%.

During the COVID-19 pandemic, Asia & Pacific (83.5%) and Africa (76.8%) recorded the highest proportional declines in tourist arrivals in 2020. In 2021, Asia & Pacific (94.2%) and Middle East (79.3%) reported the highest declines in arrivals. In 2021, Europe (62.5%) saw a relatively limited decline due to the implementation of an EU-wide standardized vaccination passport that facilitated flows of tourists across the continent (UNWTO, 2022a; European Commission, 2022; SESRIC, 2021).

Concerning the first seven months of 2022, several sub-regions reached 70% to 85% of their pre-pandemic arrivals in January-July 2022. Southern Mediterranean Europe (-15% over 2019), the Caribbean (-18%) and Central America (-20%) showed the fastest recovery based on 2019. Western Europe (-26%) and Northern Europe (-27%) also posted strong results. In July arrivals came close to pre-pandemic levels in the Caribbean (-5%), Southern and Mediterranean Europe (-6%) and Central America (-8%). Among destinations reporting data on international arrivals between January and July of 2022, those exceeding pre-pandemic levels were: the US Virgin Islands (+32% over 2019), an OIC member Albania (+19%), Saint Maarten (+15%), Ethiopia and Honduras (both +13%), Andorra (+10%), Puerto Rico (+7%), United Arab Emirates and Dominican Republic (both +3%), San Marino and El Salvador (both +1%) and Curaçao (0%). Among destinations reporting data on international tourism receipts in the first five to seven months of 2022, Serbia (+73%), Sudan (+64%), Romania (+43%), Albania (+32%), North Macedonia (+24%), Pakistan (+18%), Türkiye, Bangladesh and Latvia (all +12%), Mexico and Portugal (both +8%), Kenya (+5%) and Colombia (+2%) all exceeded pre-pandemic levels in January-July 2022 (UNWTO, 2022b).

Figure 11. Tourist Arrivals by Region (2019-2021)



Source: UNWTO, 2022c

A comparison between pre- (2019) and post- (2021) Covid-19 tourist arrivals is displayed in figure 3.7. Two major changes are observed between pre and post crises in Asia-Pacific and Europe; before Covid-19 arrivals to Europe were decreasing steadily and arrivals to Asia-Pacific were growing. However, the continuing strict travel measures in major Asia-Pacific destinations result in a decrease of market share for the region from 24% to almost 5% while Europe increased its market share from 51% to 68%. Americas and Africa also increased their share while Middle-East arrivals stayed at 5% both at pre- and post-crisis stages.

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 until 2030. This represents some 43 million more international tourist arrivals every year, reaching a total of 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 48% in 2021, and is expected to reach 58% by 2030, equivalent to over 1 billion international tourists (UNWTO, 2022b).

International Tourism Receipts

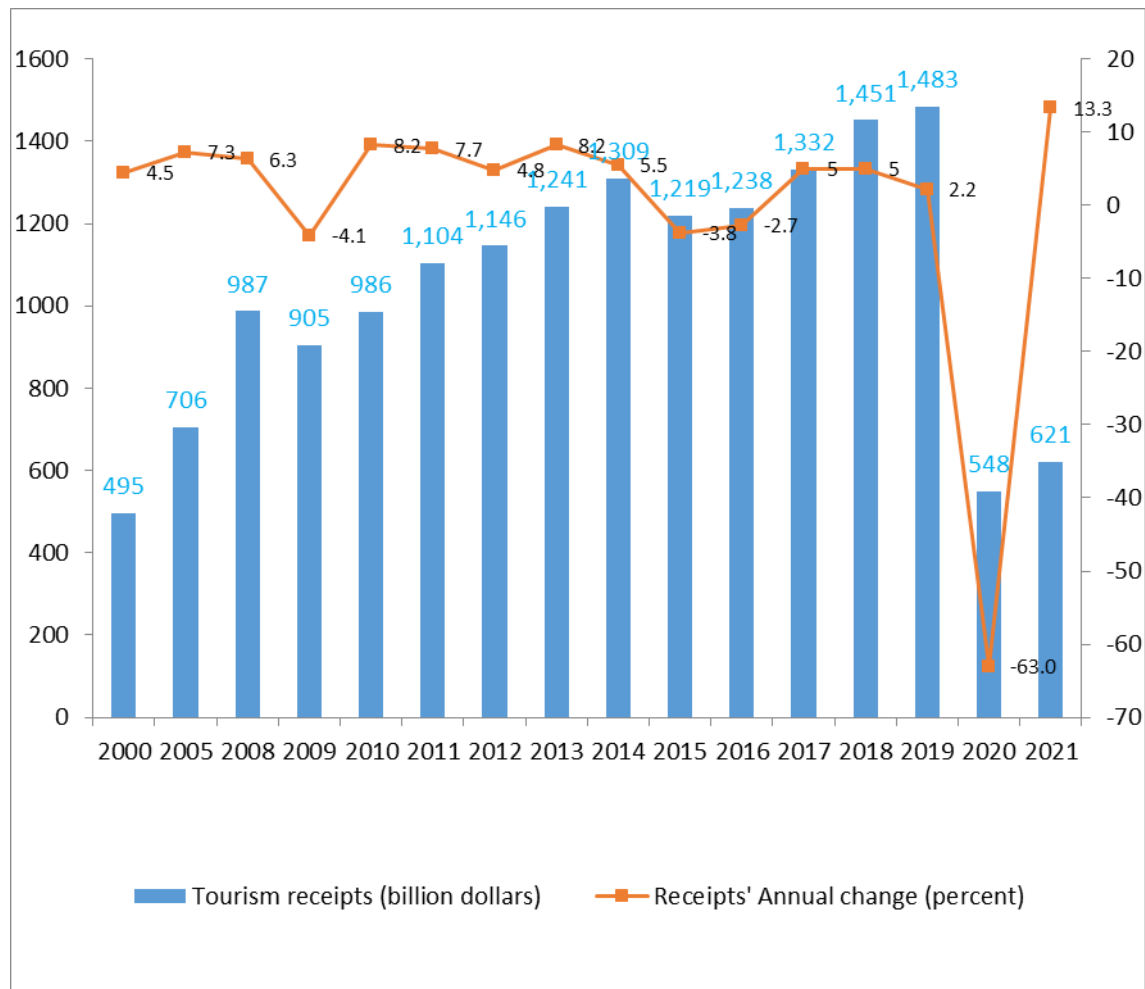
As an internationally traded service, inbound tourism has become one of the world's major trade categories. International tourism accounts for 30% of the world's export of services and 7% of overall exports of goods and services. Tourism has been growing faster than global trade for the past several 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 2019, international tourism receipts increased from 104 billion USD in 1980 to almost 1,5 billion USD in 2019 (UNWTO, 2022c). Average spending per arrival was also a little bit above 1000 USD.

Figure 3.8. shows the international tourism receipts between 2000-2021. International tourism receipts grew by 4.4 % in real terms (i.e. using local currencies at constant prices in order to adjust for inflation and exchange rate fluctuations) in 2019 by reaching to 1,5 billion USD. In addition to receipts earned in the destinations (the travel item of the balance of payments), international tourism also generated US\$ 256 billion in exports through international passenger transport services rendered to non-residents in 2019.

During the pandemic the regional level, the Middle East (73%) recorded the biggest decline in international tourism receipts in 2020 as compared to 2019 (pre-pandemic period), followed by Asia & Pacific (70.4%) and Africa (65.9%). Overall, all regions of the world were affected

abruptly by the pandemic and reported significant losses (64%) in 2020 (533 billion USD) as compared to 2019 (1,5 billion USD).

Figure 12. International Tourism Receipts and Percentage Change (2000-2021)



Source: UNWTO, 2022c.

For the past two decades, tourism receipts enjoyed an average of 4% annual increase. This is twice as much as the growth in global GDP. Before the pandemic the international tourism receipts was 1.5 trillion USD in 2019. However, with Covid-19 tourism receipts declined by 63% hitting 550 billion USD. The receipts also started to recover with relaxation in travel restrictions and enjoyed a 13% increase in 2021 as displayed in figure 3.5.

Based on 2021 data, advanced economy destinations (+1%) recorded somewhat slower growth also in receipts than emerging economy destinations (+9%) compared to 2020.

Emerging destinations also lost 71% of their volume while established destinations suffered a 72% decline in 2021 compared to 2019.

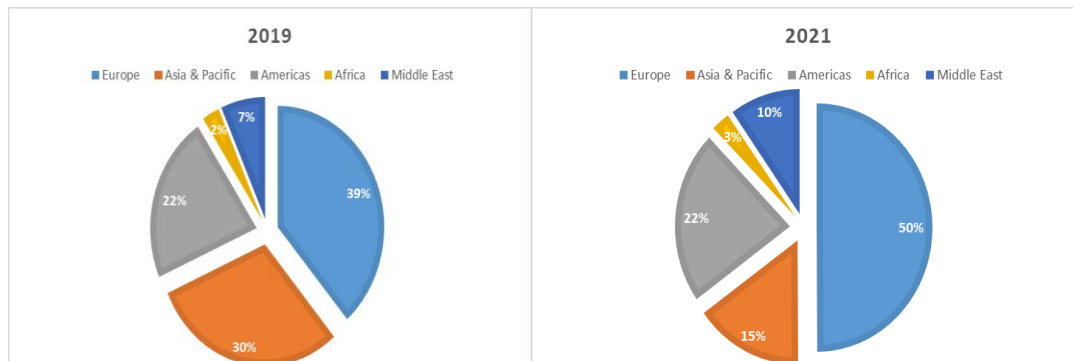
Table 4. *International Tourism Receipts by Region (Billion \$)*

Tourism Receipts	2015	2019	2020	2021	Share (%)
World	1,219	1,483	548	621	100
Europe	473	574	239	310	50
Asia & Pacific	352	441	126	94	15
Americas	298	330	125	140	23
Africa	31	39	15	16	3
Middle East	65	99	43	61	10

Source: UNWTO, 2022c

Europe received 310 million USD in 2021. Americas is the second largest regions concerning receipts with 140 million USD while Asia Pacific felt continuous impacts of Covid-19 and experienced a sharp decline from 441 million in 2019 to only 94 million in 2021. Africa and Middle East on the other hand started to recover and increased their receipts to 16 million and 61 million respectively.

Figure 13. *Tourism Receipts by Region (2019-2021)*



Source: UNWTO, 2022c

Similar to share in arrivals the Asia Pacific lost almost half of its market share after the Covid-19 crisis in 2020, accounting for 15% of global receipts. Europe on the other hand increased its share from a decreasing 39% to 50%. Americas' share of the receipts stayed at 22% while both Africa and Middle East increased their share of income from international tourism spending. It is important to stay figure 3.9. display regional distribution of the receipts. Obviously all regions experienced sharp declines in 2020 and 2021 compared to 2019 receipts.

4 International Tourism in the OIC Member Countries

In the light of the above-mentioned overview of the trends in international tourism and the impacts of both Covid-19 and other political and economic pressures, 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).

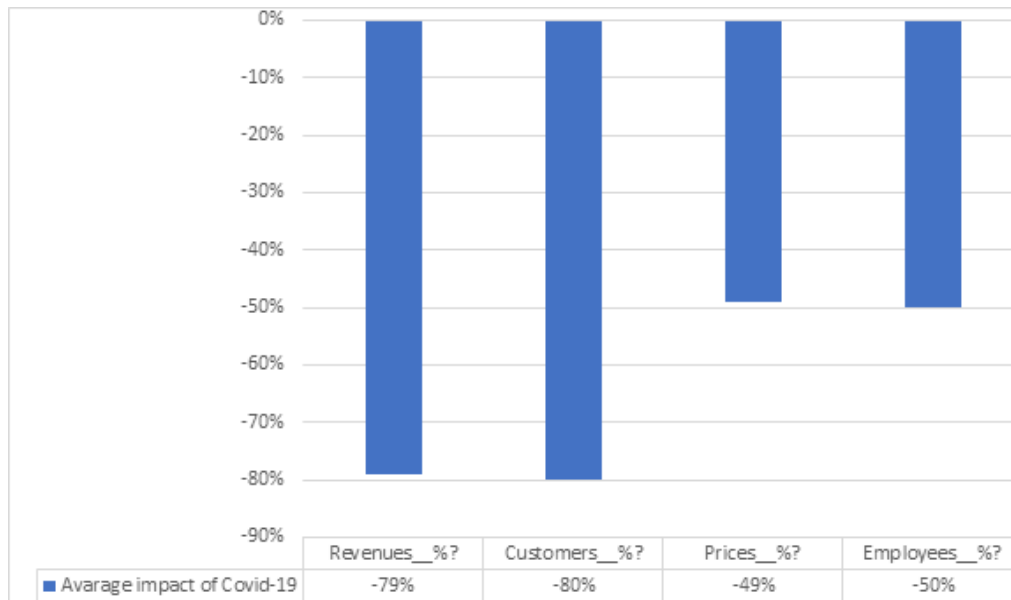
Given these conditions, it is expected that tourism might play an important role in economic field regarding particularly sustainable development and poverty alleviation in the Member Countries.

According to WTTC, the total contribution of Travel & Tourism to OIC GDP in 2018 was \$589.3 billion (8.8% of GDP) in the OIC member states. This is forecasted to rise by 5% in 2018. Because of the Covid-19 the global GDP contribution declined from 10% in 2019 to 5% in 2020. A similar decline is forecasted in OIC. The total contribution of travel and tourism on employment was 7.5% in 2019, declined to 6.2% in 2020 corresponding to a loss of 8.6 million jobs in OIC. Fortunately, tourism is expected to create 59.4 million jobs by 2029 (WTTC, 2019, 2022).

Like many destinations, the tourism sector in the OIC countries was affected negatively by the pandemic. Estimations show that the OIC countries hosted 70.4 million international tourists in 2020 instead of a baseline projection of 277.8 million. In addition, tourism receipt also declined to 78 billion USD instead of the projected 233.3 billion USD. In 2021, based on the data of the UNWTO, the average tourist arrivals in the OIC group declined by 78.7% and the receipts contracted by 62.9% over 2019. Destinations OIC-Asia region and Sub-Saharan Africa both suffered 75% decrease in tourist volume whereas OIC-MENA experienced a 61% decrease in arrivals. As a result of the pandemic, the average contribution of tourism to employment in the OIC countries declined from 7.5% in 2019 to 6.2% in 2020, corresponding to an estimated loss of 8.6 million jobs. The size of the loss in GDP generated by the travel and tourism sector was estimated as 293 billion USD in 2020 in the OIC (SESRI, 2021).

Due to a significant reduction in tourist arrivals and tourism receipts in 2020, the contribution of travel and tourism activities to GDP in the OIC group decreased from 8.1% in 2019 to 4.3% in 2020. The contraction in tourism industry resulted in a loss of USD 4.5 trillion in the global GDP during 2020. In the same year, the decline in travel volume resulted in 62 million job losses in the world, of which 8.6 million occurred in the OIC countries. The share of tourism in GDP also decline from 10.4% in 2019 to 4% in 2020 (SESRI, 2021).

Figure 14. Impact of Covid-19 on Performance Indicators (%)

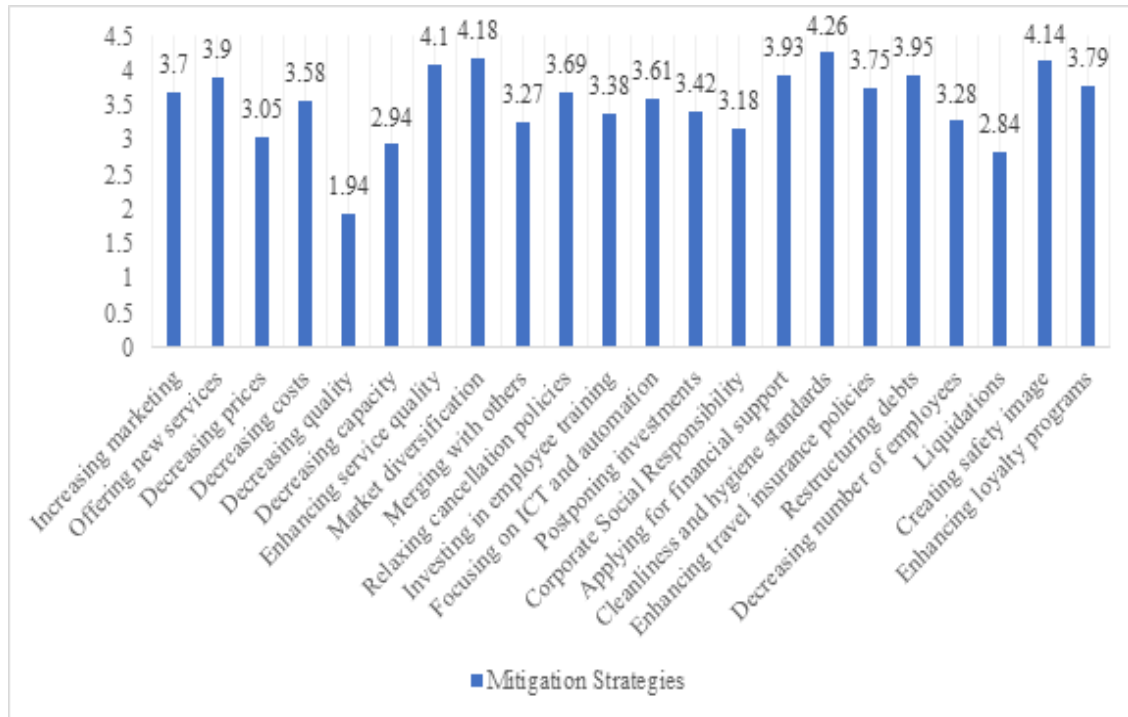


Source: COMCEC, 2021

Based on 276 responses from industry professionals operating in different OIC countries, COMCEC has measured the impacts of Covid-19's on OIC tourism organizations based on declines in revenues, customers, prices and employees as the main indicators. On the average, OIC tourism organizations are expected to lose 79% of their revenue, 80% of their customers, and 50% of their employees. The industry representative also envisioned a 49% decrease in prices as shown above (COMCEC, 2021).

Literature suggests various crisis strategies used by tourism organizations such as decreasing costs, enhancing marketing communications, decreasing capacity and so on. These strategies were also explored by COMCEC (2021) on an organizational report on mitigation strategies in tourism amid Covid-19 in OIC countries. Tourism Industry representatives were also asked about the importance of these organizational strategies that are used to mitigate the impacts of Covid-19. Enhancing cleanliness and hygiene standards (4.26), Market diversification (4.18), Creating safety image (4.14), Enhancing service quality (4.1), Restructuring debts (3.95) and Applying for financial support (3.93) were listed as the most important organizational strategies. Details of OIC tourism industry mitigation strategies and their ratings are shown on figure 95 below.

Figure 15. Tourism Industry Covid-19 Mitigation Strategies in OIC

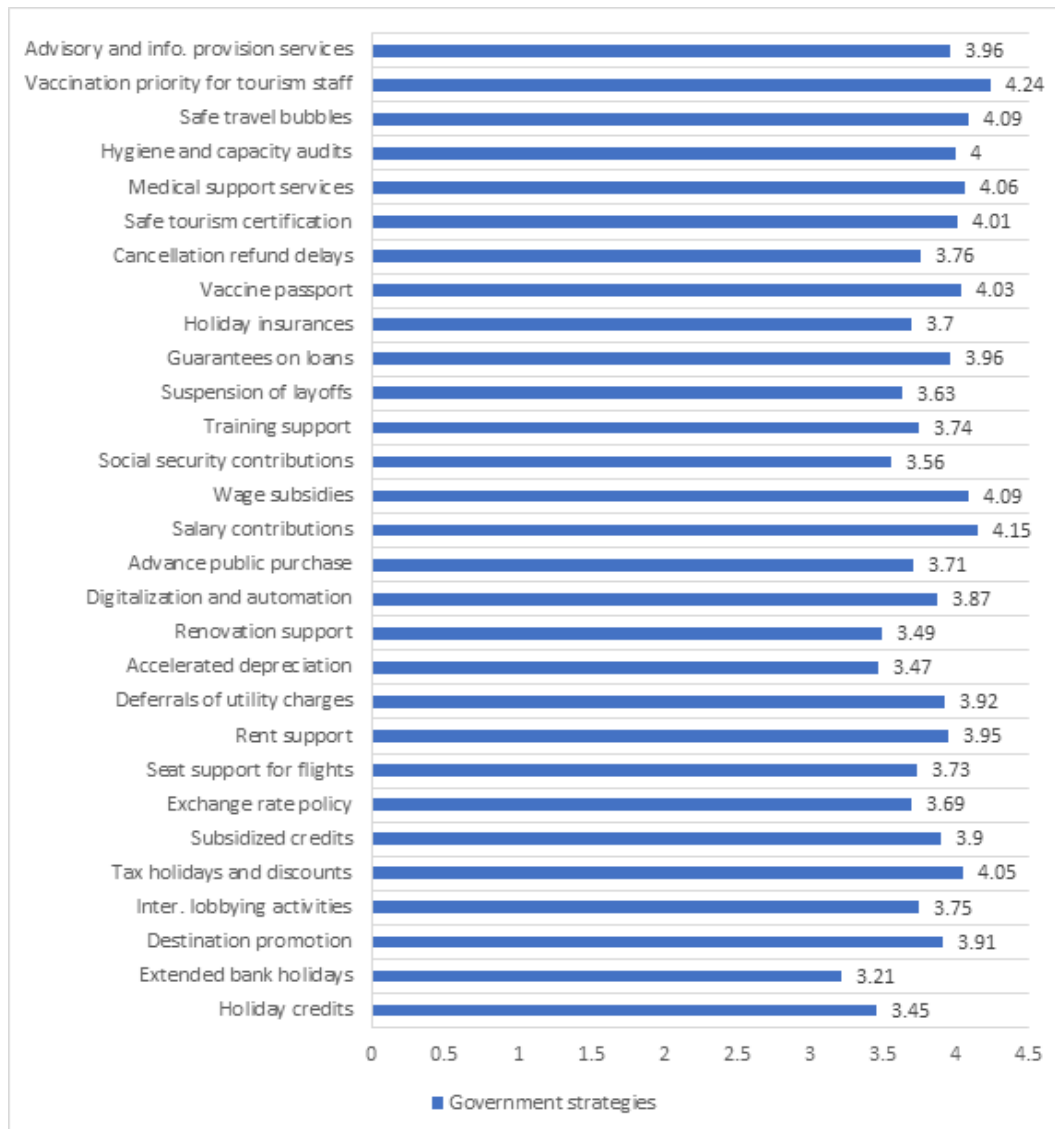


Source: COMCEC, 2021

The same report (COMCEC, 2021) explored effectiveness of government mitigation strategies in OIC based on empirical data collected from tourism industry representatives. Most generic subventions overlook the less established, micro-entrepreneurial and informal nature of tourism businesses. These small lifestyle businesses and freelance entities operating in tourism lack resources to institutionally represent themselves and apply for generic support (AEIST, 2020). In this report, government mitigation strategies during Covid-19 were compiled based on a qualitative research and literature review.

The importance of these mitigation strategies were then rated by the industry experts operating in OIC member countries. Based on their responses; Vaccination priority for tourism staff (4.24), Salary contributions for tourism employees (4.15), Safe tourism corridors and bubbles (4.09), Wage subsidies (4.09), Medical support services (4.06), Tax holidays and discounts (4.05), Establishing vaccine passport systems (4.03) and Safe tourism certificates (4.01) were identified as the most important government subsidies. The list of government subventions rated by the OIC tourism experts are displayed below;

Figure 16. Importance of Government Mitigation Strategies.



Source: COMCEC, 2021

Lack of tourism receipts is detrimental to foreign exchange income and thus the economy of many OIC countries. Unfortunately, despite Covid-19 being a major crisis, OIC countries have already been facing various other crises besides the past epidemics, including political conflicts, terrorist events, natural disasters, etc. Hence, OIC also needs to prepare and establish risk and crises management procedures to create a more crisis immune and competitive tourism industry.

This is also a period of investment and capacity building and workout long-standing problems within OIC tourism. Destinations use this time to restructure, improve and invest on

infrastructure, human resources, digital platforms, and destination governance. Among these problems are low service quality, low per capita tourist spending and leakages from local economies. The tourism industry in the OIC has been developing at a rapid pace. Yet, the increase in income generated in tourism is well below the growth rate in the volume. Therefore, OIC tourism is not able to reflect the volume increase in per capita spending. The average tourist spending was around 750 USD below the crises, which is well below the global average of 1,000 USD. Yet, Covid-19 succeeded to increase per tourist spending to 985 USD in 2020 in OIC countries.

The Corona pandemic forced the tourism system to stop in its tracks, which may be a once-in-a-lifetime opportunity for tourism to re-invent and re-structure itself and 'build back better'. Hence, if member countries invest in tourism service quality and try planning the disturbed balance between tourism supply and demand in a sustainable manner, there are also some opportunities.

One reason for this low per capita spending is the scarcity of tourism activities and low quality of services. Because of limited human and financial capital, OIC countries also tend to import know-how in the form of franchises. Despite international brands and management firms enhancing the service quality, they also create substantial leakages from the economy in profits and commissions transferred to the franchisor, foreign staff wages and management fees. One way to solve these obstacles is by encouraging tourism entrepreneurship and building local entrepreneurship capacities. Hence, governments might be more selective in their support for better quality services with higher input for local value chains.

OIC also needs to have a central governance structure at the OIC level to coordinate and invest long-term resilience against the crises. Establishing standards to enhance restrictions free travel between OIC countries such as vaccine passports, shared rapid testing and online tracking systems, declare common health, safety, cleanliness and hygiene standards and audit systems for safe tourism certification within OIC, agree on general semaphore and rules for border closures within OIC would create a more credible and predictable environment for tourism industry within OIC for future crises particularly epidemics. Such an institution would also create economies of scale for various expenses on testing and tracking than each country investing on its own certification, tracking and so on.

Another implication is to establish Covid-19 free tourism bubbles that minimize contact and risk of infection by establishing and limiting tourist touch points and vaccinating tourism employees. There are two approaches to isolating the spread of the virus in tourism. One way is to immunize tourists through border restrictions (test, quarantine, vaccination) and the other way is to immunize and isolate locals through tourist bubbles. Travel corridors between certain countries with similar infection rates can also be established to prevent any incremental risk because of travel. Australia and New Zealand; the Baltic Countries (Latvia, Lithuania and Estonia); and the Schengen zone have taken steps to create these bubbles provided that the virus is continued at a level in travel corridor countries. These bubbles and corridors would also be established by the central governance at OIC. Information on Covid-19 and restrictions should also be disseminated to tourists (eg. instructions, regional infection rates, apps, hotlines) for these tourist bubbles to work effectively.

There is also a need to establish a Standard Semafor within OIC based on international collaboration, standards and collective effort to contaminate the impacts of crises. This is particularly important in the case of epidemics where each country responds with a different border policy instead of a unified, predictable response. Several countries and international organizations already introduced criteria that should be met before reopening particularly based on the number of new cases and infection rates. OIC needs to design its strategic path out of lock-down (museums, libraries, hotels, conventions, border restrictions, quarantines, vaccination passports, testing and tracing requirements) and make its destinations accessibility more predictable. Tourism activity is a matter of planning, particularly international travel is very sensitive to last minute changes. Using these guidelines for planning and systemizing gradual easing of restrictions within the OIC, the private sector can also design their operations.

Marketing communications, public relations and lobbying activities are also important, to create a safe image and build trust. Information provision, statistics, border restrictions, sanitation processes, safe tourism standards, certification, hygiene procedures and how these are monitored and audited are not only important activities but also these should also be supported and used in branding and repositioning OIC countries as safe destinations.

Based on the transformations expected OIC countries need to adopt their strategies and priorities products and markets based on the new normal. Previous research and empirical study based on OIC tourism experts confirmed nature based tourism and health tourism are more resilient and will be more popular. Focus should also be directed towards open-air activities, individual tours rather than mass package tours and activities.

Domestic tourism has also proven more resilient than incoming tourism. Therefore, special offers around holiday weekends and festivals should be prepared. The key is not necessarily to offer the cheapest prices, but rather to offer value-for-money particularly for domestic demand. Short hall domestic tourism has preceded international travel in various destinations (e.g. Russia, China). Several countries are already promoting domestic travel instead of international and rural tourism rather than urban tourism. Some countries are offering holiday vouchers within the country; some others extend bank holidays to encourage people to travel, and use cheap holiday credits and favourable holiday packages as other means of facilitating domestic tourism. Literature also confirms a destination is more resilient and competitive if there is strong domestic demand.

OIC tourism industry should also make better use of Information and Communication Technologies (ICT). The sustained impacts of Covid-19, new variants have created an unpredictable environment with changing border restrictions, and quarantine measures. Big data analytics used for scenario planning and decision effectiveness might collect and mine different Covid-19 and travel data and offer different scenarios about the volume, source markets and revenues. ICT can also be utilized to effectively isolate, contaminate and trace the spread of the virus. Adoption of rapid testing and tracking systems, coordinated cross-border testing and tracing will improve confidence among countries and better manage travel restrictions and quarantine measures allowing real-time information about contact information not only in destination country but also in generating country before travel.

Machine learning systems can be applied to the restaurant drive-through, online ordering and web-based hotel reservation processes. Robotics has also entered the kitchen on cooking lines and hotel housekeeping functions and drones may be joining home delivery applications for restaurants. Many restaurants utilizing robots are now doing the same amount of work with 50% fewer individuals. Creating touchless services and integration of ICT, robots and AI might also increase effectiveness of Covid-19 free travel bubbles. There will be greater utilization of technology in the industry to improve the efficiency and effectiveness of how we deliver our products and services. In order to create both high-tech and high-touch services, the OIC tourism industry needs to invest in technology, AI, touchless service processes and service robots. Integrating information collection, scenario planning, research and data analysis into risk management strategies will also deliver better precision in decision making and forecasting.

Enhancing tourist experience is another major strategy that might be invested while restructuring the industry during Covid-19. Investing in both physical infrastructure, governance and human resources during this period will create a much more competitive tourism industry within OIC after the crisis is over. Major renovations and infrastructure investments can be utilized, local governance structures and collaboration between public and private sectors can be strengthened, and the quality and quantity of potential human resources in tourism can also be enhanced during Covid-19 by providing training and online courses. Restructuring should also be planned based on transformations in the market from mass tourism to more customized and sustainable versions of tourism. The tourism industry should also be more flexible in design and tourism resources should be able to be used in other areas in case of crises (e.g. tourism staff in hospitals, tourism vehicles in delivery services, hotels as hospitals and so on.)

The Corona pandemic forced the tourism system to stop in its tracks, which may be a once-in-a-lifetime opportunity for tourism to re-invent itself and 'build back better'. Enhancing intra-OIC travel, creating travel bubbles between countries, encouraging domestic tourism and family travel, subsidizing tourism for a more resilient industry, investing in collaborative planning, crisis management, and branding are among other strategies to support the tourism industry. This period can also be seen as an opportunity to fix structural problems in the industry concerning sustainability, over-tourism, climate change, and destination governance.

Hence, member countries need to find new ways to adopt the new normal in tourism and support the growing tourism industry at OIC. Safety and security concerns and political stability are also emerging as major challenges for OIC member states. It is assumed that these issues will continue to cause difficulties in the years ahead. Governments should work hard to ensure tourists' safety and minimize the impact of security threats and health concerns. Epidemics, 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.

Besides risk and crises management strategies and recovery measures, OIC governments should also focus on their tourism industry's long-term competitiveness. Enhancing entrepreneurial activities in tourism might enhance utilization of tourism potential within OIC

and trigger innovation and destination development. Investing in infra-structure in OIC destinations, adjusting the legislation and bureaucracy for and creating a better investment environment by subsidies, credits, land allocations, tax reductions, offering capacity-building programs for local human resources and discriminating local entrepreneurs, intra-OIC investors and brands and facilitating sustainable planned development of member country destinations are alternative strategies particularly amid Covid-19. Unfortunately, despite Covid-19 being a major crisis, OIC countries have already been facing various other crises besides the past epidemics, including political conflicts, terrorist events, natural disasters, etc. Hence, OIC also needs to prepare and establish risk and crises management procedures to create a more immune and competitive tourism industry.

This is also a period of investment and capacity building and workout long-standing problems within OIC tourism. Among these problems are low service quality, low per capita tourist spending and leakages from local economies. The tourism industry in the OIC has been developing at a rapid pace. Yet, the increase in income generated in tourism is well below the growth rate in the volume. Therefore, OIC tourism is not able to reflect the volume increase in per capita spending. The average tourist spending was around 750 USD below the crises, which is well below the global average of 1,000 USD. Yet, Covid-19 succeeded to increase per tourist spending to 985 USD in 2020 in OIC countries. Hence, if member countries invest in tourism service quality and try planning the disturbed balance between tourism supply and demand in a sustainable manner, and eliminate bad apples by supporting good practices, there are also some opportunities.

One reason for this low per capita spending is the scarcity of tourism activities and low quality of services. Because of limited human and financial capital, OIC countries tend to import know-how in the form of franchises. Despite international brands and management firms enhancing the service quality, they also create substantial leakages from the economy in profits and commissions transferred to the franchisor, foreign staff wages and management fees. One way to solve these obstacles is by encouraging tourism entrepreneurship and building local entrepreneurship capacities.

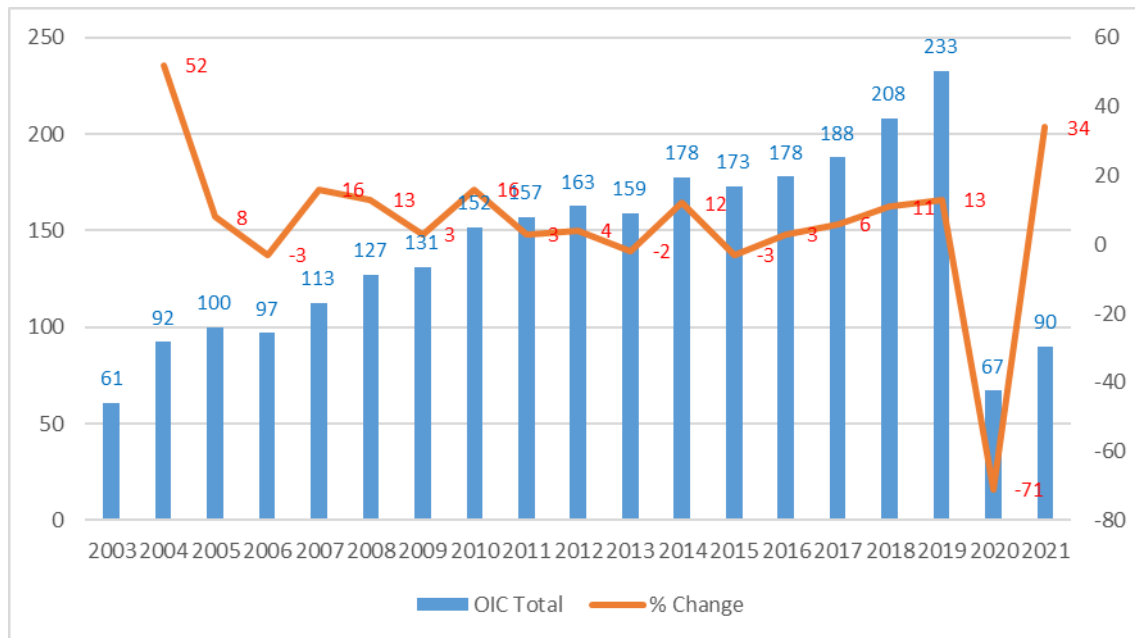
Considering the modest share of the OIC Member Countries in the international tourism market, it is evident that the inherent potential has not yet been fully realized and manifested itself at desirable levels. The OIC Member States need to understand how they can strengthen the position of their tourism industry in response to current global economic challenges and remain competitive among emerging destinations within a sustainable development perspective. Enhancing intra-OIC travel, creating travel bubbles between countries, encouraging domestic tourism and family travel, subsidizing tourism for a more resilient industry, investing in collaborative planning, crisis management, and branding are among other strategies to support the tourism industry. This period can also be seen as an opportunity to fix structural problems in the industry concerning sustainability, over-tourism, climate change, and destination governance.

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 17 displays international tourism activity in the member countries in terms of both tourist arrivals and tourism receipts in recent years. Due to lack of data on the number of tourist arrivals and tourism receipts of some countries, some estimations have to be made. During the 2010-2014 period, shown in Figure 17, 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. Between years, 2017 and 2019 OIC tourism had a historical record in arrivals, around 10%. However, the pandemic resulted in a decrease of 67% in 2020 that started recovery by almost 34% in 2021.

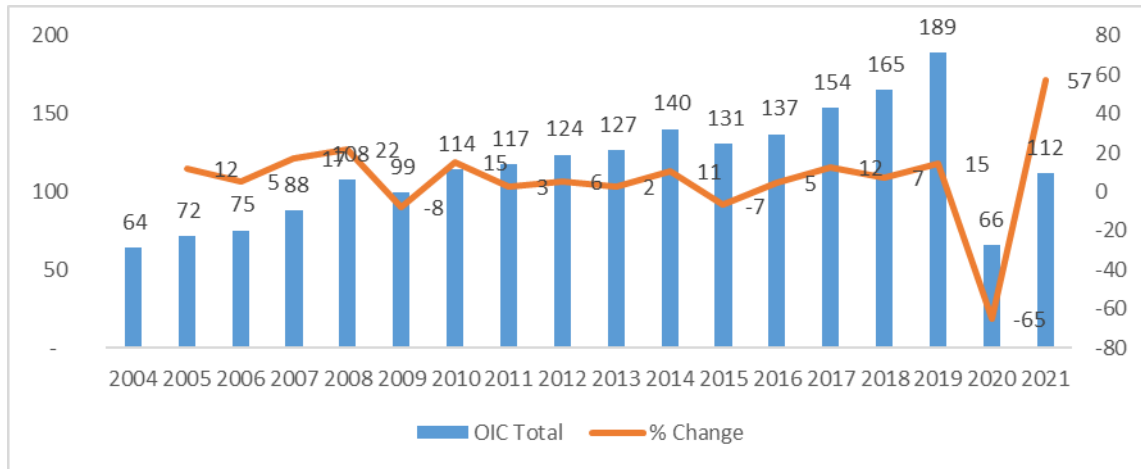
Figure 17. Tourist Arrivals in the OIC Member Countries



Source: Adopted from UNWTO, 2022b

The number of tourism receipts of the member countries increased from \$138 billion in 2016 to \$189 billion in 2019, corresponding to a 14 percent share in world’s total tourism receipts. The pandemic resulted declines up to 66% in 2020 which also started to recover with 57% in 2021. 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 travellers’ abroad, but makes the destination more expensive for international generating markets against whose currencies it has appreciated.

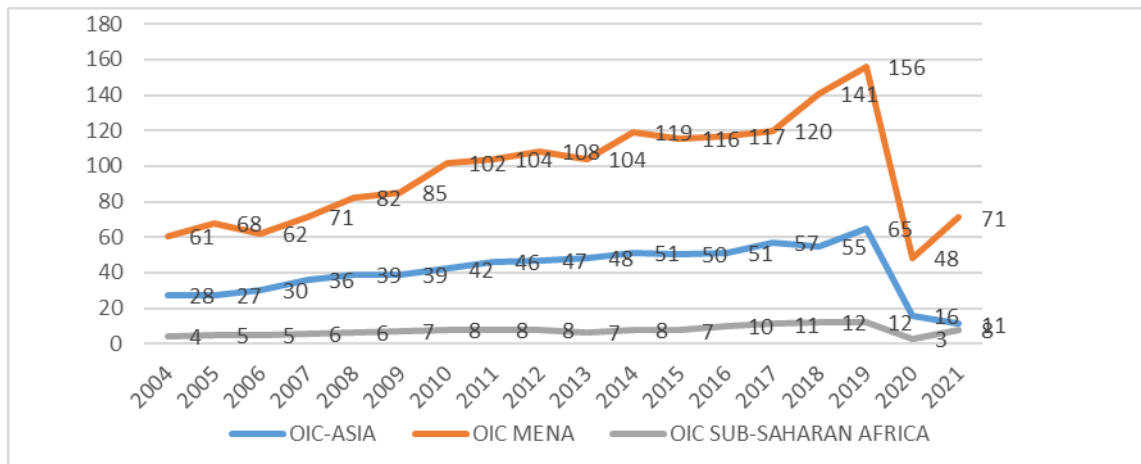
Figure 18. Receipts in the OIC Member Countries



Source: Adopted from UNWTO, 2022b

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 19. As displayed in the figure OIC-MENA has the biggest share among tourist arrivals in the member states. In this region, after a decline from record high arrivals in 2019, the number of tourist arrivals increased from 48 million in 2020 to 71 million in 2021. OIC Asia on the other hand experienced further declines from 16 million in 2020 to 11 million in 2021. Continued impacts and travel restrictions in the region have significant impact on 2021 arrivals. Africa on the other hand increased their arrivals from 3 million in 2020 to 11 million in 2021. Many OIC countries in Africa even exceeded their 2019 arrivals.

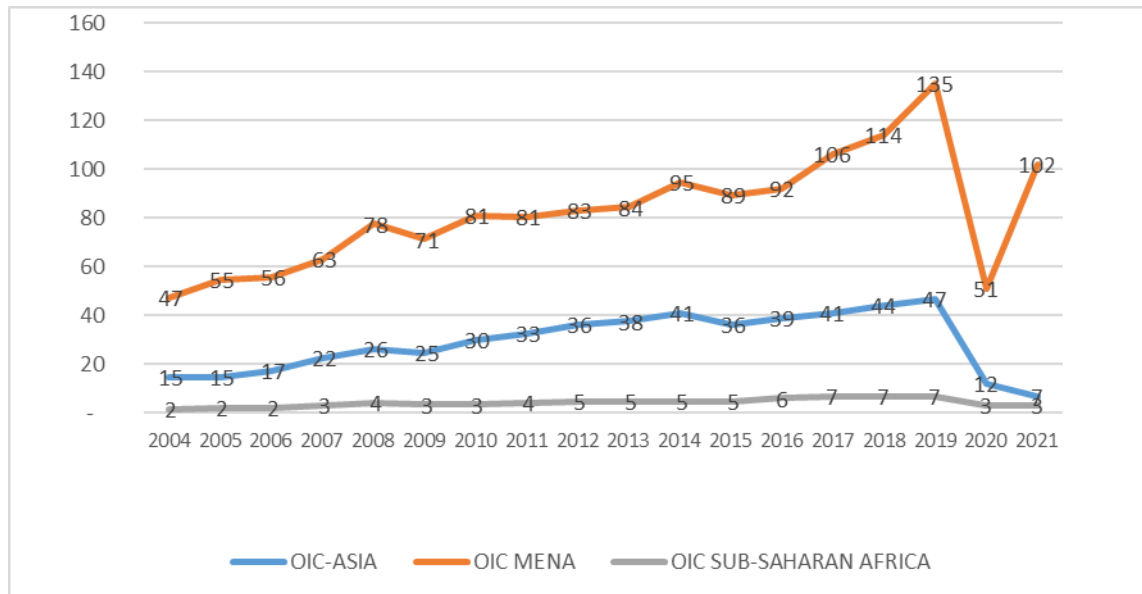
Figure 19. Tourist Arrivals in the OIC Sub-Regions (Millions)



Source: Adopted from UNWTO, 2022b

According to available data, tourism receipts in OIC Mena started to recover after a historical high 135 billion USD in 2019 to 51 billion USD in 2020. Although OIC MENA doubled its receipts, it is still 34% lower than 2019 income. Impacts of Covid-19 and resulting travel restrictions continued to affect OIC-Asia in 2020 receipts fell first to 12 billion in 2020 from 47 billion in 2019 and then to seven billion in 2021. Despite its success in recovery concerning arrivals, OIC-Africa receipts were stable at 3 billion in 2020 and 2021. 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.

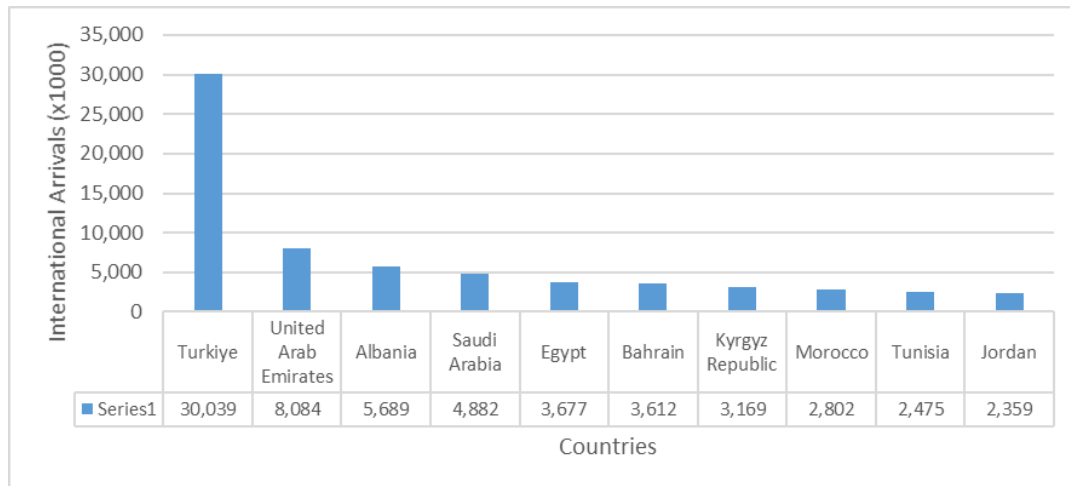
Figure 20. Tourism Receipts in the OIC Sub-Regions



Source: Adopted from UNWTO, 2022b

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, Türkiye, UAE, Albania, Egypt, Bahrain, Kyrgyz Republic, Morocco, Tunisia and Jordan were the top 10 international tourist destinations among the Member Countries in 2021. As shown in the figure 20, these 10 countries together hosted 67 million international arrivals in 2021. Some countries, particularly OIC members in Asia such as Malaysia and Indonesia have suffered from the impacts of pandemic on their source markets. Countries with limited restrictions during Covid-19 such as Albania and Kyrgyz Republic had made it to the top ten list in 2021.

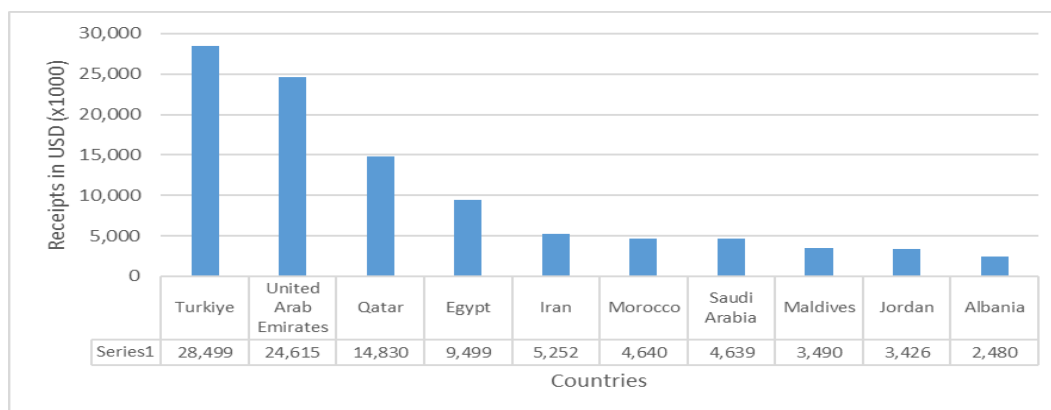
Figure 21. Top 10 OIC Tourism Destinations in Arrivals (Thousand) (2021)



Source: UNWTO, (2022b).

Concerning the international tourism receipts, top 10 Member Countries, shown in Figure 22, earned US\$ 101 billion as international tourism receipts in 2021. This was US\$ 130 billion in 2021, thus the pandemic has resulted in a decrease of around 30 billion USD on the top ten list in OIC tourism.

Figure 22. Top 10 OIC Tourism Destinations in Receipts in 2018 (Million US \$)



Source: UNWTO (2022b)

As in the case of OIC tourist arrivals, the Figure 22 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 2020 and 2021.

Türkiye hosted 45.8 million tourists in 2018. Türkiye recorded a 22% increase in arrivals in 2018 and reached 46 million arrivals placing the country on the 6th country with largest tourist volume. 2019 was a record year with more than 50 million tourists and 41 billion USD receipts. However, with the pandemic the country suffered almost 69% decrease in arrivals and 67% decrease in receipts in 2020. The recovery started in 2021 that represented 31% decrease in arrivals and 42% decrease in receipts compared to 2019 numbers. UAE recorded a slight increase in 2018 both in arrivals and in receipts, hosting around 16 million tourists and receiving 21 billion USD tourism income. In 2019, UAE also performed well welcoming almost 25 million tourists and making almost 40 billion USD. During the pandemic UAE lost almost 70 of tourism volume and 35% of its 2019 receipts. Albania did well during the pandemic concerning arrivals, because of a more relaxed mobility restrictions and suffered only around 11% decrease in 2021 compared to 2019 volume. Despite the receipts were down by almost 50%, the country succeeded to slightly exceed 2019 receipts in 2021 by 1%. Together with Maldives (10%), Albania (1%) is among the few countries who recovered during 2021 concerning receipts. Benin is the only country in OIC, which successfully increased their arrivals by 5% after the pandemic. Indonesia (92%), Iran (82%), Kazakhstan (84%), Algeria (94%), Brunei (98%), Palestine (98%), and Chad (87%) have been experiencing significant declines compared to their 2019 performance in arrivals.

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.

5 Sustainable Human Resources Management in Tourism in the OIC Member Countries

Tourism is a labour intensive industry and human resources quality in tourism is acknowledged as a major competitive advantage. Because of the pandemic 62 million tourism jobs were lost in 2020, the proactive action of some governments around the world has effectively enabled the sector to save millions of jobs and livelihoods at risk through retention schemes and mitigation support for the industry. Yet, staff shortages became as one of the key issues for recovery from COVID-19 in tourism. As demand for travel and jobs starts to rise, a sufficient labour force is required to fill the available vacancies and enable the sector to recover. A combination of factors such as workers calling in sick from COVID-19, the sluggish pace of rehiring displaced workers, and the movement of workers to other sectors has resulted in a disequilibrium between the demand for, and supply of, labour. Another key contributing factor is that travel restrictions during the pandemic have led to a fall in the number of migrant workers who are vital to the sector. As a result, Travel & Tourism businesses are struggling to fill available job vacancies (WTTC, 2022).

While staff shortages in 2021 were concentrated in the accommodation and hospitality segments of the sector, in 2022 the lack of labour has spread to the transportation segment particularly in the airline industry. To ensure that shortages do not remain an issue in the longer term, it is important to implement and sustain policies that facilitate labour mobility, flexible and remote work, decent work and pay, upskill and reskill the workforce, promote education and training, and strengthen collaboration at all levels, whilst leveraging technological and digital solutions (WTTC, 2022).

Facilitating labour mobility within OIC, encouraging flexible and remote work, encouraging decent work and employee benefits in tourism, developing and supporting skilled workforce, promoting career opportunities within tourism, strengthening collaboration among tourism industry and educational institutions and adopting ICT are among strategies offered to create a sustainable human resources management in OIC tourism.

The report also concludes with several policy recommendations:

1. Closing the gap between industry needs and formal education
2. Standardizing job descriptions and specifications in tourism
3. Endorsing certification and recognition of tourism education diplomas
4. Improve career opportunities and working conditions of tourism employees
5. Adopting to digitalization and AI technologies
6. Facilitating academic research on motivation and career development in tourism
7. Tourism insurance fund should be established to sustain tourism human resources during crises
8. Expectations and motivations of generation Z should be addressed and adopted to Human Resources processes.
9. Tourism jobs should be adopted to changing structure of demographics and aging potential staff
10. Discourage part-time and seasonal employment by subsidizing long-term recruitment.

11. Encourage involvement of disadvantaged groups in tourism employment such as women and migrants.

6 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 concerning;

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

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

Figure 23. Tourism Opportunities in the Member Countries

Natural Resources
Cultural Resources
Human Resources
Authenticity and novelty
Price competitiveness
Dynamism

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 labour-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 24. Challenges Affecting Tourism Performance in the Member Countries



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 first Meeting on 7-8 December 2012 in İzmir, Türkiye. 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 endeavours 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 Islamophobia, Epidemics, Terror, and so on.

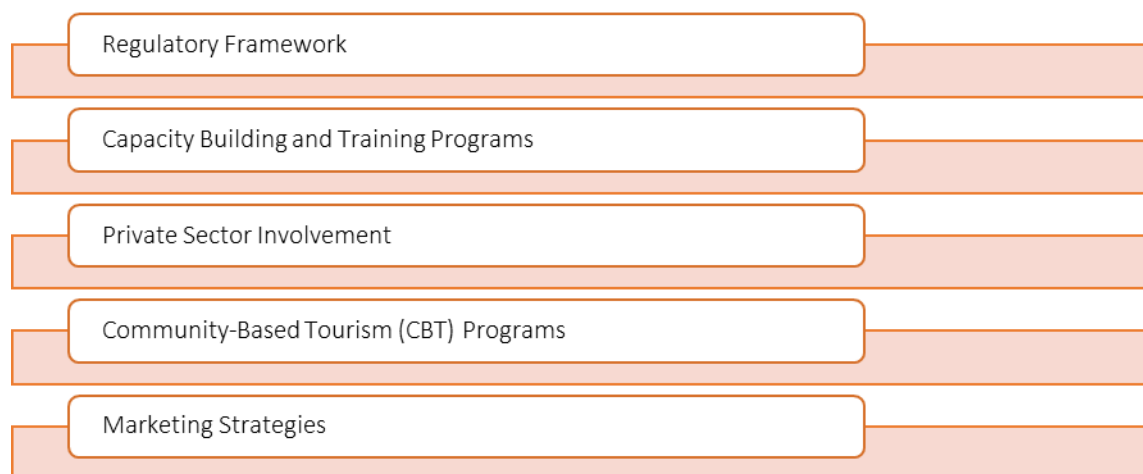
The 4th Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 14-15 January 2016 in İstanbul with the theme of "Promoting Muslim-Friendly Tourism (MFT) Products and Services in the OIC Member Countries." In this forum, the participants discussed the current state of international tourism 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 25. 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, Türkiye with the theme of *“A New Trend in Sustainable Tourism Development: Community Based Tourism in the OIC Member Countries.”* The representatives of 15 Member States, which have notified their focal points for the Tourism Working Group, attended the Meeting. 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).

The 2nd Meeting of the COMCEC Tourism Working Group was held on October 3rd, 2013 in Ankara, Türkiye 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).

The 3rd Meeting of the COMCEC Tourism Working Group was held on March 4th, 2014 in Ankara, Türkiye 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 5th Meeting of COMCEC Tourism Working Group was held with the theme of “Travel Facilitation for Enhancing Mobility in the OIC Member Countries” on February 5th, 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 8th 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 32nd Session of the COMCEC held on 21-24 November 2016 in İstanbul. Following policy recommendations were suggested as the out 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 9th 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, Türkiye 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-crisis 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, Türkiye 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.

The theme of the 12th Meeting of the COMCEC Tourism Working Group was of "Destination Marketing Strategies in the OIC Member Countries". After COMCEC Coordination Office delivered a presentation on Tourism Outlook in OIC Countries, the thematic report on Destination Marketing Strategies was presented, OIC representatives, participants from international organizations and private sector representative shared their experiences. After the full day deliberations, the Workgroup offered the following policy recommendations;

- Establishing / Empowering a central body (i.e. DMO, CVB) to be responsible for marketing efforts at the destination level
- Managing and regulating existing distribution channels and creation of new distribution channels to prevent dependency and minimize power asymmetry.
- Collecting, storing, analysing and dissemination of market data; visitor characteristics, seasonality, distribution channel performance, source markets, trends and so on.

The 13th Meeting of the COMCEC Tourism Working Group was held on February 13rd, 2019 in Ankara, Türkiye with the theme of "Sustainable Destination Management Strategies in the OIC Member Countries". The Meeting involved a presentation of the OIC Tourism Outlook and the report on "Sustainable Destination Management Strategies in the OIC Member Countries"

commissioned by the COMCEC Coordination Office. Following policy recommendations were suggested as the outcome of the meetings, discussions as well as the analytical studies:

- Facilitating stakeholder engagement at the destination level and encourage tourism businesses' sustainable tourism efforts.
- Improving community participation by minimizing leakages from local economy, conduct media campaigns to increase local community involvement as well as tourist awareness of tourism sustainability.
- Establishing KPIs for sustainable tourism development based on international standards and climate change agreements.

The 14th Meeting of the COMCEC Tourism Working Group was "Developing Multi-Destination Tourism Corridors in the Member Countries". The Meeting involved a presentation of the OIC Tourism Outlook and the report on "Developing Multi-Destination Tourism Corridors in the Member Countries" commissioned by the COMCEC Coordination Office. Following policy recommendations were suggested as the outcome of the meetings, discussions as well as the analytical studies:

- Identify potential tourism corridors with different themes such as Islamic Silk Road, Alexander the Great, The travels of Imam Bukhari, Cross-border parks and protected areas in West Africa and so on.
- Establish an OIC-wide advisory body to support and develop cross-border corridor development.
- Establish a funding scheme to support corridor development, investments and international cooperation between destinations

The 15th Meeting of the COMCEC Tourism Working Group was held on September 24th-25th, 2020 in a virtual-only format, with the theme of "Developing Medical Tourism in the OIC Member Countries". The Meeting was attended by the representatives of 18 Member States. Representatives of COMCEC Coordination Office, UNWTO, WTTC, ICDT, ICCIA and SMIC have also attended the Meeting. The Meeting involved a presentation of the OIC Tourism Outlook and the report on "Developing Medical Tourism in the OIC Member Countries" commissioned by the COMCEC Coordination Office. Following policy recommendations were suggested as the outcome of the discussions as well as the analytical studies:

- Establish «Medical Service Quality Accreditation Body» specific to healthcare provision in OIC countries in order to supervise countries and bring standards to international level.
- Develop «OIC Health Tourism Statistical System» in order to achieve efficiency and effectiveness of medical tourism activities

- To sign protocols between governments for bilateral or regional agreements between public/private stakeholders including insurances and hospitals in order to sustain the exchange of patients

The 16th and 17th Meetings of the COMCEC Tourism Working Group was held in a virtual-only format during Covid-19, with the theme of “Mitigation Strategies for Tourism After Covid-19”. The Representatives of the Member States have shared their experiences, achievements and challenges regarding mitigation strategies in their respective countries. The participants have deliberated on the aforementioned theme and considered the study “Mitigation Strategies for Tourism After Covid-19” commissioned by the COMCEC Coordination Office.

- Keeping tourism industry afloat by offering subsidized cheap credits with government guarantee, utilizing selective financial and fiscal tools including tax holidays and discounts; subsidies on such costs as rent, utilities, energy, water; allowing accelerated depreciation and wage subsidies and social security contributions.
- Enhancing Intra-OIC collaboration in establishing organizational level safety standards; creating shared certification and audit systems, investing on a shared application of testing and tracking, implementing a standard semaphore at OIC level; enhancing data sharing and establishing travel bubbles between countries.
- Facilitating short term demand; encouraging domestic travel; offering holiday credits and vouchers, extend bank holidays and tax discounts on domestic tourism services that might encourage residents to travel inside the country while discouraging outgoing tourism; and calling for advance public purchase of airline tickets, meetings, events and lodging services to support tourism industry.

The 18th and 19th Meetings of the COMCEC Tourism Working Group were held in a virtual-only format with the theme of “Sustainable Human Resources Management in the Tourism Sector”. Member country representatives shared their experiences, achievements and difficulties in the management of human resources in their countries. Participants conveyed their thoughts on the aforementioned theme and exchanged ideas on the “Sustainable Human Resources Management in the Tourism Sector” study commissioned by the COMCEC Coordination Office. At the meeting, besides the research report prepared on the aforementioned theme, the countries where the case studies were conducted were discussed in detail, and the opinions and suggestions of the participants were made together with the findings revealed within the scope of the relevant study, and policy recommendations on the subject were formulated.

- Promoting in-service training, tourism schools, certificate programs, international exchange programs, and internship opportunities with a view to improving service and quality in the tourism industry
- Ensuring the sustainability of Employee well-being through, among others, rewards, bonuses or raises in salary and favourable working circumstances.
- Increasing synergy between businesses and educational institutions

6.2.2 COMCEC Project Support Programs

COMCEC Project Funding (CPF)

The other important instrument for the implementation of the COMCEC Strategy is the COMCEC Project Funding (CPF) Mechanism. Through the CPF, the CCO provides grants to the selected projects proposed by the relevant OIC institutions and Member Countries that have already registered with the Tourism Working Group (TWG). Projects financed under the CPF must be designed in accordance with the objectives and the expected outcomes defined by the Strategy in the tourism section. Projects also play important roles in realization of the Policy Recommendations formulated by the Member Countries during the TWG meetings.

Within the scope of COMCEC Project Funding, six Calls for Project Proposals were made between 2013-2018. With these project calls, a total of 18 projects were implemented successfully by the relevant OIC Member Countries and OIC Institutions. The general information regarding the projects implemented is presented in the table below.

Call No	Country/Institution	Project Title	Partners
1	Azerbaijan	Cities of Common Cultural Heritage	Kazakhstan, Türkiye and Uzbekistan
	SESRIC	Improving Statistical Capacities of Tourism Sector in COMCEC Mediterranean and Gulf Region	10 Member Countries
2	The Gambia	Strengthening Community Resilience through eco-tourism.	Senegal and Guinea Bissau
3	The Gambia	Enhancing the Capacity of Craft Producers in the OIC Member Countries	Senegal, Mali
	Malaysia	Short Course on Strategies in Enhancing Tourism Workforce in Community Based Tourism (CBT) within OIC Member Countries	10 Member Countries
	The Gambia	Developing a Training and Certification Program for the Muslim Travel, Tourism and Hospitality Industry	Nigeria, Senegal

4	Mozambique	Enhancing Capacity of Muslim Friendly Tourism Workforce	Mali, Senegal
	SESRIC	Training Program on the Development and Promotion of Muslim Friendly Tourism in COMCEC Member Countries	18 Member Countries
	Sudan	Enhancing The Capacity of Craft Producers & Customers service In OIC Member Countries	Chad, Djibouti
5	Burkina Faso	Strengthening the Resilience of Tourism Sector Against Crises through Communication	Niger, Côte d'Ivoire
	Mali	Training on Crisis Communication in Tourism for Selected OIC Member Countries	Burkina Faso, Niger, Mauritania, Senegal
	Mozambique	Community-Based Tourism through The Promotion of Heritage Sites for Poverty Alleviation	The Gambia, Malaysia, Sudan, Uganda
	SESRIC	Improving Islamic Tourism Ecosystem in OIC Member Countries: Destination and Industry Development	13 Member Countries
	ICDT	Developing Muslim-Friendly Tourism in Guyana and Suriname	Suriname, Türkiye, Malaysia
	Mali	Capacity Building on Destination Management Organizations of OIC Member Countries	Burkina Faso, Togo, Senegal, Côte d'Ivoire, Niger, Guinea, Mauritania
	Mozambique	Improving Human Capacity on Muslim Friendly Tourism for Regulating Accommodation Establishments in the OIC Member Countries	Malaysia, Sudan, Uganda, Nigeria
	Gambia	Training of Accommodation Providers in the OIC Member Countries on Muslim Friendly	Senegal, Nigeria

6		Tourism Standards and Quality Service Provision	
	Azerbaijan	Destination Management Organization: Conceptual Framework for Azerbaijan, Cameroon and Iran	Cameroon, Iran

Furthermore, within the framework of 7th and 8th Calls for Project Proposals, three projects were selected to be financed by the CCO. The projects completed during the 2021 implementation period are as follows;

- The first project, “Capacity Building of Destination Management Organizations (DMO) Stakeholders” was implemented by Cameroon in partnership with Azerbaijan, Burkina Faso and Türkiye. The project purpose was to enhance the capacity of DMO stakeholders by conducting a training program.
- The second project, titled “Community-Based Tourism through the Promotion of Heritage Sites” was implemented by Uganda in partnership with Sudan, Mozambique and Nigeria. The objective of this project was to enhance the capacity of different stakeholders on community based tourism as well as new product development and encouraging local participation.
- Lastly, Türkiye implemented the project titled “Revitalizing Mevlana's Travel Route” with two partner countries, Azerbaijan and Iran. This project aimed at restoring Mevlana’s travel route involving two countries together with the project owner country.

Moreover, under the 9th Call for Project Proposals, two projects were selected to be financed by the CCO in 2022. The selected projects to be completed under the 9th Call are as follows;

- The project, titled “A Two-Day Training on Human Resource Management in Tourism Sector” is being implemented by Nigeria with the partnership with the Gambia, Sudan and Türkiye. The project aims to enhance the human resource management capacity of the participants with a view to enhancing their

productivity and effectiveness for sustainable tourism development in tourism sector.

- The other project, “Risk Analysis and Crisis Planning and Management for Community Based Tourism” has been implemented by Uganda with three partner countries, namely Mozambique, Nigeria and Sudan. The project purpose is to increase the capacity of stakeholders involved in community-based tourism in risk analysis and crisis planning and management.

The CCO has made the 10th Call for Project Proposals on October 1st, 2022. Relevant documents are available on the COMCEC Project Support Programs website. (<https://programs.comcec.org/>)

COMCEC COVID Response (CCR)

COMCEC COVID Response is mainly about alleviating the negative impacts of the pandemic on Member Country economies with a particular focus on agriculture, trade, tourism, financial cooperation, poverty alleviation and transport & communication sectors. The program is based on financing certain types of projects, which would focus on needs assessment, sharing expertise, and providing direct grants to final beneficiaries.

Under the 1st Call for Project Proposals, four projects were implemented by the Member Countries in 2021. The details of the implemented projects are as follows;

- The Azerbaijan’s project, titled “Supporting the Accommodation Business in Implementing Hygiene Standards“ aimed at improving the hygiene and safety measures in accommodation unites in order to eliminate the negative effects of the COVID-19 pandemic. In this respect, a certain amount of hygiene equipment consisting of dispenser along with dispenser stand and were purchased and distributed to hotels and accommodation unites.
- The project, titled “Rejuvenation of Small Businesses Affected by COVID – 19 : A Case on Tour Operators in Bangladesh” was implemented by Bangladesh. The purpose of this project was to assess the needs of the tour operators and other small enterprises and recommend effective and sustainable path to rehabilitate the affected establishments. In this context, a needs assessment report which focus on mitigating the effects of COVID-19 and actions to be taken for the new normal was created.

- Burkina Faso's "Developing of Health Protocols for Tourism Industries to Fight against COVID-19" project targeted developing health protocols in the purpose of ensuring the safety of tourists and employees in the tourist sector in the scope of COVID-19 pandemic. The study visit was conducted by experts from Burkina Faso to Türkiye for providing to tourism industries specific health protocol in order to fight against the pandemic.
- Suriname's project on "COVID-19 Awareness & Resilience Training for Tourism and Hospitality Businesses" aimed at raising awareness of customer and workers in tourism sector in order to ensure safety of all parties in the sector. Within the project, a three day online training was conducted in order to share knowledge and equip participants with technical and practical insights about a range of actions for preparing businesses for COVID-19 impacts and adjustments.

Also, under the 2nd Call for Project Proposals, a project was selected to be financed by the CCO in 2022. The project, titled "Preparation of COVID-19 Hygiene Protocol and Training of Employees within the Tourism, Leisure and Hospitality Sector " is being implemented by Sierra Leone. The purpose of this project is to prepare the Covid-19 hygiene protocol handbook for safe tourism operations and to train staff/employees in tourism and hospitality establishments on the prepared protocol.

COMCEC Al-Quds Program

Considering the current situation and special conditions in Palestine, especially in Al-Quds Al-Sharif, and the resolutions of the recent Extraordinary Islamic Summits on Al-Quds, the CCO has initiated the Al-Quds Program, which focuses on destination development and management as well as community-based tourism in Al-Quds. Implemented in collaboration with the Ministry of National Economy of Palestine, the program consists of several projects to be carried out between 2020 and 2022. The first two were finalized by the end of 2020.

Under the first project titled "Analyzing the Tourism Infrastructure and Developing a Tourism Destination Road Map for Al-Quds", the CCO conducted a research study for analyzing the tourism infrastructure and developing a tourism destination roadmap for Al Quds. Within the framework of this research study, the current situation of the tourism infrastructure in Al-Quds (hotels, restaurants, transportation, human resources, guides, tour operators, etc.) was assessed, the most urgent areas that need investment was determined as well as the cultural assets and facilities that could be included in the tourism offering of Al-Quds was analysed. The project also contains assessment of the number and capacity of tourism facilities and workers in Al-Quds, the need for training of sector professionals and craftsmen. The Project ultimately provided a SWOT analysis and mission, vision and objective for a tourism destination and communication strategy for Al-Quds.

The second project, titled "Supporting Institutional Capacity of Al-Quds Tourism and Heritage Council" aims at improving the institutionalization and sustainable financing mechanism of the Al-Quds Tourism and Heritage Council (ATHC) to be a well-functioning

destination management organization for Al-Quds. The project provided a conceptual study for determining ATHC personnel training needs, developing training modules and deliver training programs, recommending a DMO organizational structure, HR needs and sustainable self-funding opportunities.

As a continuation of the program, five projects were implemented by the Ministry of National Economy of Palestine between 2021-2022. The activities of the projects consist of, among others, exhibitions, art production, trainings, capacity building, procurement of machinery/equipment/service, online platform development, renovations, research, audio-visual material production etc. The detailed information on the projects is as follows;

- With the first project, titled “Al-Quds: Secrets and Narratives to Unfold”, it was aimed to be increased the permanence of tourists visiting Al-Quds in their tourism experiences, understood the essence of Palestinian cultural heritage and organized exhibitions for enhancing the attractiveness of tourism. In this regard, realized activities were making renovation investments to improve the existing exhibitions that had to be closed due to the COVID-19 pandemic, preparing a 3D model that promotes selected institutions from the old city and creating a website to increase recognition.
- Within the framework of the second project titled “The Artists’ Identity Path: Tracing Heritage in Al-Quds”, it was aimed at bringing focus to Jerusalem’s rich Palestinian cultural heritage through contemporary artists’ perspectives and fostering multi-sectoral collaborations and engaging artists with the local community. In line with this aim, a chain of 10 artworks was developed for promoting Jerusalem’s cultural heritage and creating tourist appreciation.
- With the third project, titled “Jerusalemites: Because We Are the Place and Time”, it was aimed at preserving the Palestinian character and cultural heritage as well as enhancing communities’ resilience of the Old City of Jerusalem. In this context, it was realized a series of activities consisting of involving research on three tourism pathways (historical, religious and economic) in Al-Quds, audio-visual-written material production, heritage camp organization, and training of Jerusalemite women to become tourist guides.
- Under the project, titled “Enjoy the Hidden Jewels of Al Quds Promotion Program”, it was focused on increasing the competitive advantage of Al-Quds through an online reservation system, especially for one-day guaranteed departure excursions and other new products. In line with this purpose, it was created the reservation system for the FIT (Free Independent Tourists) tourist segment providing a guaranteed departure tour service and prepared a guide on “Hidden Jewels in Al-Quds”.
- In the last project, titled “Old City Bakeries: Food Tourism and Heritage”, it was aimed at renovating bakeries as well as developing capacities of bakery owners and/or workers on the packaging and online marketing. In order to be achieved these purposes, the realized activities were a compliance assessment study for 25 bakeries, determining the main needs for increasing the capacity of the bakeries, a training program focusing on packaging and online marketing, purchasing equipment for facilitating and improving work performance as well as minor

modifications of some of the bakeries and video film reflecting bakeries' history, architecture, food preparation methods, etc.

Moreover, under the COMCEC Al-Quds Program, the CCO has called for Project Proposals in October , 2022 to be financed in the 2023 implementation period.

7 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, 1.401 million international tourists travelled in 2018 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 2018, international tourism receipts—which are the export value of tourism, excluding international passenger transport—increased from US\$125 billion in 1980 to US\$ 1,451 billion in 2018 (UNWTO, 2019a) 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 2019 is likely to be no different. Three main factors influenced tourism flows in 2017 and 2018; the exchange rate fluctuations, interest rates race to the bottom, 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). Trade Wars, Brexit and the fall of Thomas Cook had also major impacts on tourism industry.

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 2019. 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 fulfil 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. Despite 10% annual increase in 2017 and 2018, for 2018 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 2004-2018 particularly during 2018 OIC-Mena recorded a 21% growth. In the same period, OIC-ASIA has experienced a slight decrease in tourist arrivals. OIC- Sub Saharan Africa on the other hand continued its stable growth. In terms of tourism receipts, both OIC-MENA and OIC-Asia increased their tourism income whereas there was a slight decrease in OIC- Sub Saharan Africa's receipts in 2018.

In 2015, it was estimated that there were 117 million Muslim international travellers. The COMCEC Tourism Working Group has also explored Muslim Friendly Tourism (MFT) potential in its three consecutive meetings. The 7th Tourism Working Group was held on February 4th, 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 7th 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 8th and 9th Tourism Working Group Meetings.

Safety and security concerns are in the spotlight for OIC member states, and it is assumed that these issues will continue to capture attention in the years ahead. COMCEC looked into risk and crises management issues in 2017. Governments should work hard to ensure the safety of tourists and to minimize the impact of security threats. Incidents like the sector observed in 2015 and 2016 should need careful planning and management. These will all be tackled during the 10th Tourism Working Group Meeting in September, 2017. 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 looking into destination planning, management and marketing issues from 2018 onwards. The governance of destinations has been covered during the 11th meeting and their marketing role will be covered in September, 2018 during the 12th Tourism Working Group Meeting in Ankara. The sustainability of destinations and creating a balance between the needs of the industry, the environment and locals were covered during the 13th meeting in Feb. 2019. The 14th meeting was organized on 31st Oct. 2019 will focus on creating, marketing and managing multi-destination tourism corridors in OIC. The 15th Meeting of the COMCEC Tourism Working Group was held on September 24th-25th, 2020 in a virtual-only format, with the theme of "Developing Medical Tourism in the OIC Member Countries".

Amid Covid-19 COMCEC responded to commission a report on impacts and mitigation strategies for Covid-19 and corroborating with the crises recovery and its significance 16th and 17th Meetings of the COMCEC Tourism Working Group was dedicated to Pandemic. The Meeting was held in a virtual-only format during Covid-19, with the theme of “Mitigation Strategies for Tourism After Covid-19”. The 18th and 19th Meetings of the COMCEC Tourism Working Group was held in a virtual-only format during Covid-19, with the theme of “Sustainable Human Resources Management in the Tourism Sector”. This report addressed the challenges of training, attracting and retaining quality tourism staff, which is a significant challenge for OIC tourism industry.

Besides the pandemic, the Russian Ukrainian war and the trade wars. The energy prices and 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 (2009-2020)

ARRIVALS - OIC	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
World (Millions)	894	952	995	1,035	1,087	1,134	1,186	1,235	1,329	1,401	1,459	410
Afghanistan												
Albania	1,792	2,417	2,932	3,156	2,857	3,341	3,784	4,070	4,643	5,927	6,406	2,658
Algeria	1,912	2,070	2,395	2,634	2,733	2,301	1,710	-	2,451	2,657	2,371	591
Azerbaijan	1,005	1,963	2,239	1,986	2,130	2,160	1,922	2,045	2,454	2,850	3,170	796
Bahrain	-	955	-	1,014	1,069	838	-	-	4,372	12,045	11,061	1,909
Bangladesh	267	303	-	125	148	125	-	-	1026	267	323	
Benin	190	199	209	220	231	242	218	-	281	322	337	
Brunei Darussalam	157	214	242	209	225	201	-	219	219	4521	4449	1071
Burkina Faso	269	274	238	237	218	191	-	-	143	144	143	67
Cameroon	498	573	604	812	912	-	-	-	-	997	1021	
Chad	70	71	77	86	100	122	-	-	87	63	81	10.4
Comoros	11	15	19	-	-	-	-	-	28	35.9	45.1	7
Cote d'Ivoire	-	252	270	289	380	471	-	-	1800	1965	2070	668
Djibouti	-	51	-	60	63	-	-	-	-	-	-	-
Egypt	11,914	14,051	9,497	11,196	9,174	9,628	9,139	5,258	8,292	11,346	13,026	
Gabon	186	-	-	-	-	-	-	-	186	-	-	-
Gambia	142	91	106	157	171	156	-	-	162	552	620	246
Guinea	-	12	-	96	56	33	35	-	-	-	-	-
Guinea-Bissau	-	22	-	-	36	36	44	-	-	55	52.4	
Guyana	141	150	157	177	200	206	207	235	247	287	315	87
Indonesia	6,324	7,003	7,650	8,044	8,802	9,435	10,408	12,948	13,396	15,810	16,107	4,053
Iran	-	2,938	3,354	3,834	4,769	4,967	5,237	-	4,867	7295	9,107	1,550
Iraq	1,262	1,518	-	1111	892	-	-	-	-	-	-	-
Jordan	3,789	4,207	3,960	4,162	3,945	3,990	3,763	3,858	3,844	4,922	5,361	1,240
Kazakhstan	3,118	3,393	4,093	4,807	4,926	4,560	-	-	-	8,789	8,515	2,035
Kuwait	297	207	269	300	307	198	-	-	-	8508	8565	2161
Kyrgyz Republic	2,147	1,316	3,114	2,406	3,076	2,849	-	-	4568	6,947	8,508	
Lebanon	1,844	2,168	1,655	1,366	1,274	1,355	1,518	1,688	1857	1,964	1,936	
Libya	-	-	-	-	-	-	-	-	34	-	-	-
Malaysia	23,646	24,577	24,714	25,033	25,715	27,437	25,721	26,800	26757	25,832	35,046	6,102
Maldives	65	792	931	958	1,125	1,205	1,234	1,286	1390	1484	1703	555
Mali	160	169	160	134	142	168	-	-	193	203	217	
Mauritania	-	-	-	-	-	-	-	-	-	-	-	-
Morocco	8,341	9,288	9,342	9,375	10,046	10,283	10,177	10,332	11,349	12,489	13,109	2,802
Mozambique	1,461	1,718	1,902	2,113	1,886	1,661	1,552	1,639	1,447	2,870	2,033	
Niger	66	74	82	94	123	135	135	-	164	157	192	85
Nigeria	1,414	1,555	715	486	600	-	-	-	-	-	-	-
Oman	1,524	1,446	1,343	1,438	1,392	1,519	-	-	2,372	3,242	3,506	869
Pakistan	855	907	1,161	966	565	565	-	-	-	-	-	-
Palestine	396	522	449	490	545	556	432	400	503	3050	3810	93
Qatar	1,659	1,519	2,527	2,346	2,611	2,826	2,930	2,906	2,256	1,819	2,137	582
Saudi Arabia	10,897	10,850	17,498	14,276	15,772	18,260	17,994	18,049	16,109	17,570	20,292	
Senegal	810	900	1,001	962	1,063	836	-	-	1,365	-	-	-
Sierra Leone	37	39	52	60	81	44	24	54	51	66	71	
Somalia	-	-	-	-	-	-	-	-	-	-	-	-
Sudan	420	495	536	575	591	684	-	-	813	836	-	-
Suriname	150	204	220	240	249	252	228	257	278	-	-	-
Syria	6,092	8,546	5,070	-	-	-	-	-	8546	1,802	2,424	
Tajikistan	-	160	-	244	208	213	414	-	1250	1035	-	-
Togo	150	202	300	235	327	282	273	-	514	573	876	482
Tunisia	6,901	7,828	4,782	5,950	7,352	7,163	5,163	5,724	7052	8,299	9,429	2,012
Turkey	25506	31,364	34,654	35,698	37,795	39,811	39,478	31,365	37601	46113	51,747	15,971
Turkmenistan	-	-	-	-	-	-	-	-	-	-	-	-
UAE (Dubai)	6,812	7,432	8,129	8,977	9,990	-	-	14,910	15790	1,506	1,543	473
Uganda	807	946	1,151	1,197	1,206	1,266	-	-	1402	23092	25282	8,084
Uzbekistan	1,298	1,327	1,460	-	1,969	-	-	-	-	5,346	6,749	
Yemen	434	1,025	829	874	990	-	-	-	-	-	-	-

Source: UNWTO 2022c, SESRIC, 2021

Table 2: Tourism Receipts in the OIC Member Countries (2009-2020) (US \$ Millions)

Receipts - OIC	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
World (US \$ Billion)	853	928	1,030	1,075	1,159	1,309	1,260	1,220	1,332	1,451	1,487	418
Afghanistan	-	55	71	56	56	-	-	-	-	2018	2019	2020
Albania	1,816	1,626	1,628	1,464	1,473	1,705	1,500	4,070	1,929	50	85	75
Algeria	267	219	209	217	250	258	-	1710	141	2306	2458	1243
Azerbaijan	353	621	1,287	2,433	2,365	2,432	2,309	2,045	3,012	197	140	50
Bahrain	1,118	1,362	1,035	1,051	1,165	1,197	-	1200	3642	2830	2004.1	340
Bangladesh	70	81	87	105	129	153	148	125	337	3834	3860	724
Benin	131	133	187	170	189	151	-	267	150	357	391	217.9
Brunei Darussalam	254	-	-	92	96	79	-	219	177	175	240.86	-
Burkina Faso	64	72	133	84	153	135	-	163	117	190	217	38
Cameroon	270	159	409	349	576	-	-	912	524	179	173	-
Chad	-	-	-	-	-	-	-	-	-	633	681	437
Comoros	32	35	44	39	49	51	-	-	-	-	-	-
Cote d'Ivoire	151	201	141	172	181	184	-	1441	396	73.7	72.7	18.5
Djibouti	16	18	19	21	22	21	-	63	35	551	550.5	199.3
Egypt	10,755	12,528	8,707	9,940	6,047	7,208	6,065	5,258	7,775	57	63	30
Gabon	-	-	-	-	-	-	-	186	186	12704	14256	4874
Gambia	63	74	83	88	-	-	-	135	103	-	-	-
Guinea	3	2	2	1	-	-	-	35	16	174	157	53
Guinea-Bissau	-	13	-	7	17	21	-	44	16	4.7	10.4	1.29
Guyana	35	80	95	64	77	79	65	-	-	20	18.92	-
Indonesia	5,598	6,957	7,952	8,325	9,119	10,261	10,761	9963	13139	28	27	24
Iran	2,012	2,438	2,381	1,114	3,076	3,483	-	4,942	4,402	17915	18,405	3,533
Iraq	-	1,660	1,543	1,634	-	-	-	892	2959	5252	-	-
Jordan	2,911	3,585	3,425	4,061	4,117	4,375	4,065	3,858	4,639	1,986	3,593	955
Kazakhstan	963	1,005	1,209	1,347	1,522	1,467	1,625	4560	2135	6,221	6765	1745
Kuwait	354	290	319	425	298	369	499	182	313	2651	2922	589
Kyrgyz Republic	459	284	640	698	530	423	426	3051	429	919	1198	524
Lebanon	6,744	7,861	6,545	6,327	6,492	6,523	6,857	1,688	7,611	518	708	195
Libya	50	60	-	-	-	-	-	-	-	8694	8717	2369
Malaysia	15,772	18,276	18,259	20,250	21,496	22,595	17,597	26,757	18,323	52	-	-
Maldives	608	1,713	1,868	1,951	2,333	2,696	2,567	1,286	2,744	21,775	22,200	3,386
Mali	192	283	267	142	178	212	-	159	206	3054	3171	1409
Mauritania	-	-	-	48	41	37	29	-	23	231	-	-
Morocco	6,557	6,703	7,281	6,703	6,854	7,056	6,003	10,332	7,442	6	14	6
Mozambique	196	197	231	250	199	207	193	1,639	151	9520	9,949	4,514
Niger	66	105	96	50	58	90	-	135	83	331	324	113
Nigeria	602	576	628	559	542	543	404	1255	2549	114	130	-
Oman	689	780	996	1,095	1,295	1,376	1,540	1897	1748	1,977	1471	321
Pakistan	272	305	373	339	288	283	315	965	352	2874	3,077	669
Palestine	410	667	795	581	789	603	-	400	225	845	992	765
Qatar	179	584	1,170	2,857	3,456	4,591	5,035	2,906	5,971	301	384	191
Saudi Arabia	5,995	6,712	8,459	7,432	7,651	8,238	10,130	18,049	12,056	15,239	15,647	14,318
Senegal	463	453	468	407	439	423	-	1007	419	16974	19849	5960
Sierra Leone	25	26	44	42	66	35	23	54	83	557	-	-
Somalia	-	-	-	-	-	-	-	-	-	39	43	-
Sudan	299	94	185	772	773	967	949	741	1029	-	-	-
Suriname	64	61	61	71	84	95	88	257	46	1043	821	689
Syria	3757	6190	1753	-	-	-	-	-	-	73	64	19
Tajikistan**	20	32	-	-	-	-	-	414	8	-	-	-
Togo	68	66	79	111	125	125	-	273	138	171	179.1	102.4
Tunisia	2,773	2,645	1,914	2,227	2,191	2,359	1,354	5,724	1,305	269	264	-
Turkey	21,250	22,585	25,054	25,653	27,997	29,552	26,616	31,365	22,478	2,320	2,683	1,007
Turkmenistan	-	-	-	-	-	-	-	-	-	36791	41415	13771
UAE	7,352	8,577	9,204	10,380	11,564	13,969	16,038	14,910	21,048	-	-	-
Uganda	667	784	960	1,135	1,334	791	1,149	1303	937	1,522	1400	518
Uzbekistan	99	121	-	-	-	-	-	1969	689	34,610	38413.3	24615.4
Yemen	486	1,161	780	849	940	1,026	-	-	-	1314	1679	395

Source: UNWTO 2022c, SESRIC, 2021

Table 3: 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. Türkiye	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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