

INTERNATIONAL

TOURISM

IN THE OIC COUNTRIES:

PROSPECTS AND CHALLENGES

2017



ORGANISATION OF ISLAMIC COOPERATION
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Foreword

Over the past few decades, international tourism activity has shown substantial and sustained growth in terms of both the number of tourists and tourism receipts. While the world tourist arrivals and tourism receipts have been growing substantially over the years, world tourism markets witnessed some important changes in the direction of tourism. This has been clear in the increase observed in the relative share of the developing countries, including the OIC member countries, in the world tourist arrivals and tourism receipts. As a substantial part of the developing countries, the OIC member countries also benefited from such a positive change. As a group, the OIC countries attracted 173.4 million tourists in 2015, compared with 160.6 million in 2011. International tourism receipts in the OIC countries also recorded a slight increase during the period 2011-2015 and reached \$139.3 billion as of 2015.

A similar positive trend has been also observed in intra-OIC tourism activities where intra-OIC tourist arrivals increased from 60.9 million in 2011 to 67.7 million in 2015, corresponding to 39 per cent of total OIC international tourist arrivals. One of the main driving factors behind this positive development in intra-OIC tourism is the emergence of the Islamic (Halal) tourism in which all tourism activities, services, facilities and products are designed and served in line with the principles of Islam.

The present version of the *International Tourism in the OIC Countries: Prospects and Challenges* report of SESRIC examines the performance and economic role of international tourism sector in the OIC countries in the latest five-year period for which the data are available. The report also reviews the developments seen in the Islamic Tourism sector with a special emphasis on the OIC countries, which has a great potential for sustainable growth and significant contribution to the development of the overall tourism sector in the member countries. The report devotes Section 5 to discuss the potential role of the tourism sector to promote regional integration and deepen cooperation among the OIC countries. Finally, the report elaborates on the challenges ahead of the tourism industry in the OIC countries and proposes some policy implications to serve as broad policy guidelines to overcome these challenges.

Amb. Musa Kulaklıkaya
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1 Introduction

Defined by the United Nations World Tourism Organisation (UNWTO), international tourism comprises the activities of individuals travelling to and staying at places outside their usual permanent places of residence for a period not exceeding 12 months for leisure, business and other purposes. Based on this broad definition, the tourism industry includes all socio-economic activities that are directly and/or indirectly related to the provision of goods and services to tourists. In this regard, the UNWTO identifies 185 supply-side activities that have significant connections to the tourism sector.¹ These activities include the services of various sectors, such as transportation and communication, hotels and lodging, food and beverages, cultural and entertainment services, banking and finance, and promotion and publicity services. Defined by this impressive network of socio-economic activities and the infrastructure needed to support it, tourism is one of the largest sectors in the world as well as an important category of international trade.

Over the past few decades, international tourism activity has shown substantial and sustained growth in terms of both tourism revenues and number of tourists, and has left broad economic, social, cultural and environmental footprints reaching almost every part of the globe. International tourism activity generates significant economic benefits to tourists' host and home countries alike. According to the UNWTO, the number of international tourist arrivals increased from 998 million in 2011 to 1,235 million in 2016, corresponding to an average annual growth rate of 4.4 per cent. The revenues generated by those tourists, i.e. international tourism receipts, in terms of current US dollar prices, increased from \$1,073 billion to \$1,220 billion in the same period, corresponding to an average annual growth rate of 2.6 per cent. In 2016, the world tourism revenues amounted to \$3.34 billion per day or \$988 per tourist arrival.

International tourism activity is also characterized by a continued increase in geographical spread and diversification of tourist destinations and products. Although the bulk of international tourism activity is still concentrated in the developed regions of Europe and the Americas, a substantial proliferation of new tourist-receiving markets is also observed in the developing regions. According to the UNWTO data, the two traditionally high tourist-receiving regions, Europe and the Americas attracted, together, 70.7 per cent of the world's total tourist arrivals in 2011. Yet, by 2016, this share declined to 66.9 per cent in favour of the

¹ UNWTO, "Standard International Classification of Tourism Activities (SICTA)", http://www.unwto.org/statistics/basic_references/index-en.htm

developing regions such as the Asia & Pacific. Between 2011 and 2016, the recorded decrease in the share of Europe in the world tourism receipts was the most substantial among other regions that went down from 44.8 per cent to 36.7 per cent in favour of the developing regions in the world. International tourism has turned into one of the main economic activities and an important source of foreign exchange earnings and employment in many developing countries. Therefore, in recent years, tourism development has been given much attention in the national development strategies of many developing countries and placed on the agenda of many recent international conferences on sustainable development.

With their rich and diverse set of natural, geographic, historical and cultural attractions, the OIC countries, as a group, possess a significant potential for the development of a sustainable international tourism sector. Yet, given the modest share of the OIC region in the world tourism market and the concentration of tourism activity in only a few OIC countries, apparently, a significant part of this potential remains unutilised. This state of affairs manifests itself in the relatively modest shares of the OIC countries, as a group, in the global international tourist arrivals and receipts, which were recorded at 14.9 per cent and 10.1 per cent in 2015, respectively. The problems facing tourism and the development of a sustainable international tourism sector in the OIC countries are diverse as each country has its own tourism-related characteristics, level of development and national development priorities and policies.

Another promising factor for the OIC countries in the domain of tourism is the emergence of Islamic (Halal) tourism. An increasing number of people living in the OIC countries prefer using tourism facilities and services designed in line with the Islamic principles. According to the latest estimates, the demand for Islamic (Halal) tourism will continue to grow and is expected to reach \$243 billion by 2021. The positive trend seen in Islamic tourism not only boosts the overall tourism sector in the OIC countries but also helps to increase intra-OIC tourism activities since the majority of the Islamic tourism facilities and services are being provided in the OIC countries. However, Islamic tourism market is highly concentrated in the Middle East and North Africa (MENA) region which accounts for half of the total out bound tourism expenditures made by the Muslim tourists. OIC countries as a group constitutes a major source market for the global Islamic tourism industry. With estimated tourism expenditures of over \$108 billion, these countries account for around 72 per cent of the total tourism expenditures made by the Muslim tourists in 2015. In the same year, 9 out of the 10 top Islamic tourism source markets were the OIC countries. On the other hand, the GMTI (Global Muslim Travel Index) 2017 revealed that Malaysia, United Arab Emirates, Indonesia, Turkey, Saudi Arabia and Qatar are the top Islamic tourism destinations.

Among other benefits, tourism provides an avenue for increased economic cooperation and policy-dialogue especially among neighbouring countries those located in the same region. In particular, intraregional tourism promotes regional integration through increased trade and economic activities, helps countries to better understand each other and paves the way to address some common challenges such as visa restrictions and non-standard practices at customs. Intra-OIC tourism figures indicate the existence of a limited progress over time in the entire OIC group as such the share of intra-OIC tourist arrivals in total OIC arrivals increased from 36.4 per cent in 2010 to 39 per cent in 2015. It is therefore essential for OIC countries to take policy actions and interventions in order to fully benefit from the potentials of regional tourism as an enabler of regional integration.

All in all, tourism is a very important sector that could, if properly planned and managed, play a significant role in the socio-economic development of many OIC countries. This is true not only due to their existing and potential rich tourism resources, but also because their citizens travel in large numbers around the world for business, leisure and other purposes. It is therefore tourism has been defined as one of the ten priority areas of cooperation in the OIC Plan of Action to Strengthen Economic and Commercial Cooperation among the Member Countries which was adopted in 1994. Tourism has also been identified as one of the six priority areas for cooperation in the recently adopted COMCEC Strategy with the strategic objective of developing a sustainable and competitive tourism sector in the OIC region. In this context, it is also worth noting that tourism cooperation activities have over the last decade assumed greater importance on the agenda of the OIC where nine Islamic Conference of Tourism Ministers (ICTM) and a number of expert group meetings and seminars on tourism development were held during the period that elapsed since the First Islamic Conference of Tourism Ministers (ICTM), which was held in Isfahan, Islamic Republic of Iran, in October 2000. A wide range of actions has been adopted in these conferences and meetings aiming at developing the tourism sector in the OIC countries and enhancing their cooperation in this vital and multidimensional field of economic, social and cultural activity. More recently, the 'OIC 2025: Programme of Action', which was adopted in Istanbul in 2016, identified five specific goals related with the tourism development in the OIC countries. Yet, the desirable levels of tourism development in many OIC countries, and in the OIC region as a whole, have not yet been achieved.

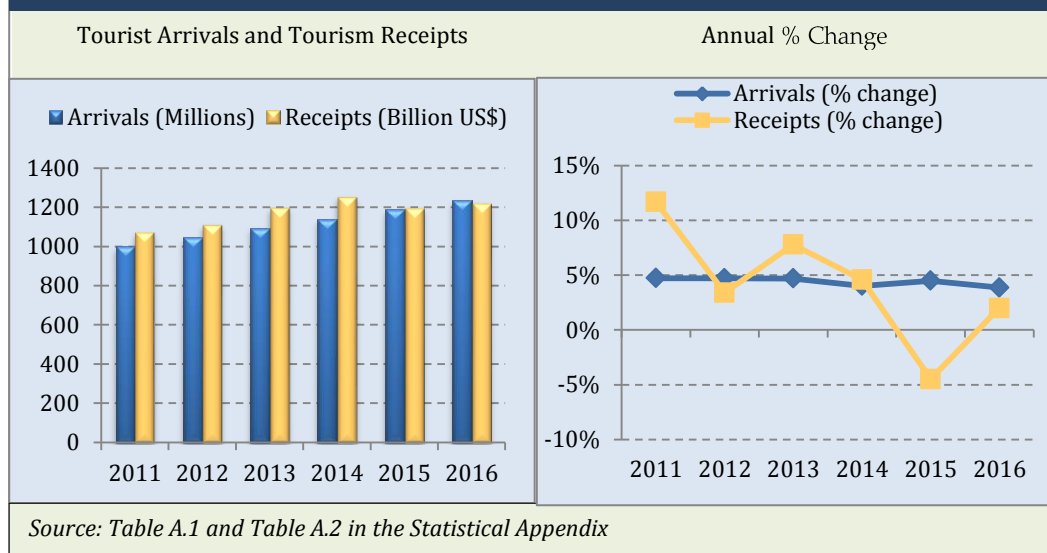
Given this state of affairs, this Report attempts to assess the performance and economic role of the international tourism sector in the OIC countries in the latest five-year period for which the data are available. It analyses the two traditionally used indicators in measuring international tourism, i.e. international tourist arrivals and international tourism receipts. The analysis is made at both the individual country and the OIC regional levels. The Report dedicates Section 4 to

the Islamic tourism topic, which constitutes a great potential for the development of the tourism sector in OIC countries. Section 5 of the Report provides a discussion on the potential role of the tourism sector to promote regional integration and deepen cooperation among the OIC countries. In conclusion, the Report sheds light on the challenges of tourism development in the OIC countries and the issue of tourism cooperation among them and proposes some policy implications to serve as broad policy guidelines to which the attention of these countries needs to be drawn.

2 International Tourism Worldwide: Overview

The number of international tourist arrivals worldwide increased from 998 million in 2011 to 1,235 million in 2016, corresponding to an average annual growth rate of 4.4 per cent. In the same period, international tourism receipts, in current US dollar prices, increased from \$1,073 billion to \$1,220 billion, corresponding to an average annual growth rate of 2.6 per cent (Figure 2.1). In terms of worldwide regional distribution, Europe, the Asia & Pacific and the Americas were the top three main tourist-receiving regions in 2011. They attracted, respectively, 519.9, 221.6 and 155.7 million tourists, corresponding to 54.4, 23.2 and 16.3 per cent of the world tourism market in 2011 (Figure 2.2). Over the period 2011-2016, the world international tourist arrivals followed a positive and stable annual growth pattern. In the same period, growth in international tourism receipts stayed well above 2 per cent except in 2015, which was mainly due to the exchange rate fluctuations in developing countries.

Figure 2.1: Worldwide International Tourism



Since international tourism is characterised by a growing tendency for tourists to visit new destinations, coupled with the diversification of tourism products as well as increasing competition in international tourism markets, new destinations are steadily growing at a faster pace in many developing countries, particularly located in the Asia & Pacific region. Therefore, these regions experience a remarkable increase in their share in the world tourism market. For example, the Asia & Pacific

region, mostly consisting of developing countries, experienced the highest annual growth rate of tourist arrivals measured at 6.9 per cent over the period 2011-2016. It was followed by Americas and Europe with annual average growth rates of 5.1 per cent and 3.4 per cent, respectively. Africa, as a developing region, achieved a remarkable increase in international tourist arrivals with an average annual growth rate of 2.9 per cent during the period under consideration. In contrast, Middle East could not improve its overall performance significantly due to the ongoing conflicts and political instability in the region. Nevertheless, the number of international tourist arrivals in this region went up from 50.3 million in 2011 to 53.6 million in 2016, corresponding to a 1.3 per cent average annual growth rate (Figure 2.3).



During the period 2011-2016, the Asia & Pacific and the Americas were the only two regions that achieved to increase their share in the world tourism market in terms of the number of tourist arrivals. The share of the Asia & Pacific region went up from 23.2 per cent in 2011 to 25.7 per cent in 2016 (Figure 2.2). The share of the Americas region in world also increased slightly from 16.3 per cent in 2011 to 16.7 per cent in 2016. Despite seeing positive growth in terms of world tourist arrivals, a substantial decrease was observed in the share of Europe in world tourist arrivals that went down from 54.4 per cent in 2011 to 50.2 per cent in 2016. The international tourism receipts in Europe also decreased from \$466.7 billion to \$447.4 billion in the same period (Figure 2.4). A major reason behind this picture is

the on-going economic uncertainty in several European countries that affected expenditures of European tourists negatively. The Africa region received a smaller share in world tourist arrivals and tourism receipts in 2016 when compared to 2011. In this period, its share in arrivals decreased from 5.2 per cent to 4.5 per cent and its share in receipts went down from 3.1 per cent to 2.9 per cent (Figure 2.2). African countries not only need to focus on increasing international tourist arrivals but also try to find ways to boost receipts from tourism through diversifying tourism activities (e.g. beach vs. mountain) and developing alternative tourism types (e.g. balloon safari tours) as well as implementing market-targeting strategies (trying to attract more tourists from countries with a higher consumption tendency).

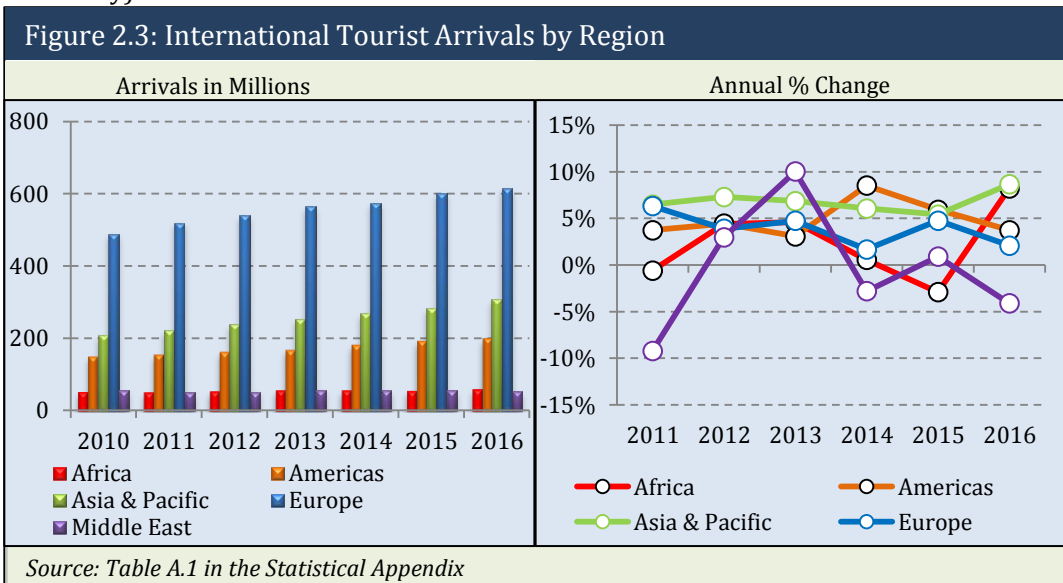
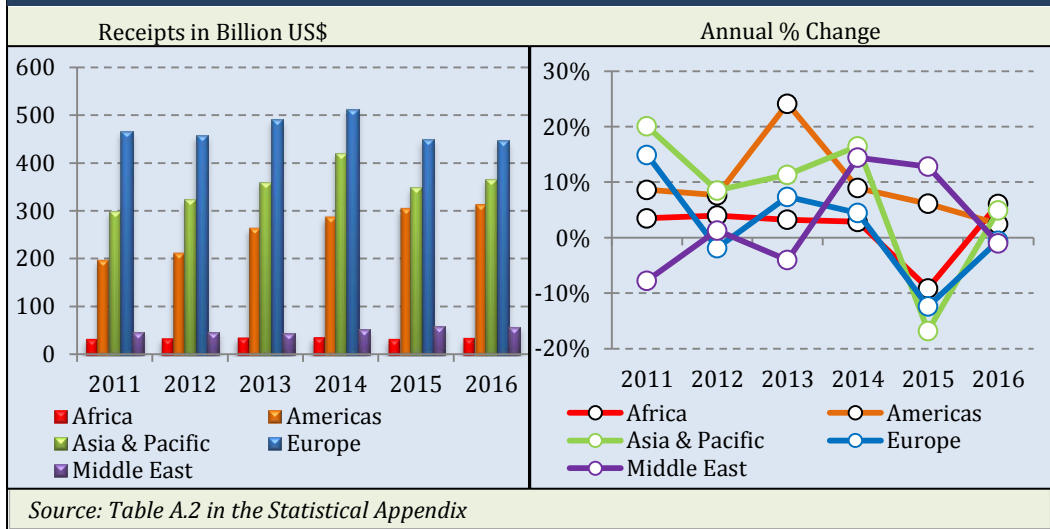


Figure 2.2 also shows that Europe and Asia/Pacific regions were continuing as strong performer regions in the world tourism market both in 2011 and 2016. In 2016, these two regions accounted for 67 per cent of all international tourism receipts and 76 per cent of all international tourist arrivals.

Figure 2.4: International Tourism Receipts by Region



As countries tend to reach their normal economic growth rates after the global economic recovery, the number of tourist arrivals started to follow a more stable trend between 2011 and 2016. Given the exchange rate fluctuations mostly seen in developing economies, the worldwide tourism receipts showed some booms and boosts between 2011 and 2016 (Figure 2.1, right and Figure 2.4, right). This bears an important uncertainty item for many developing countries that are relatively more dependent on tourism activities, which are generating substantial amount of foreign currency income and fuelling economic growth.

In 2011, international tourism activity continued to grow and reached 998 million international tourist arrivals and \$1,073 billion international tourism receipts. It is observed that as a reflection of the economic conditions, economic recovery was particularly strong in emerging economies. Between 2011 and 2012, the Asia & Pacific region recorded the highest annual growth in terms of international tourist arrivals (13.5 per cent). Both in 2012 and 2013, all five regions saw increases in terms of international tourist arrivals. As a result, international tourist arrivals went up from 1,045 in 2012 million to 1,093 million in 2013 where the receipts increased by \$87 billion (Figure 2.3, left and Figure 2.4, left).

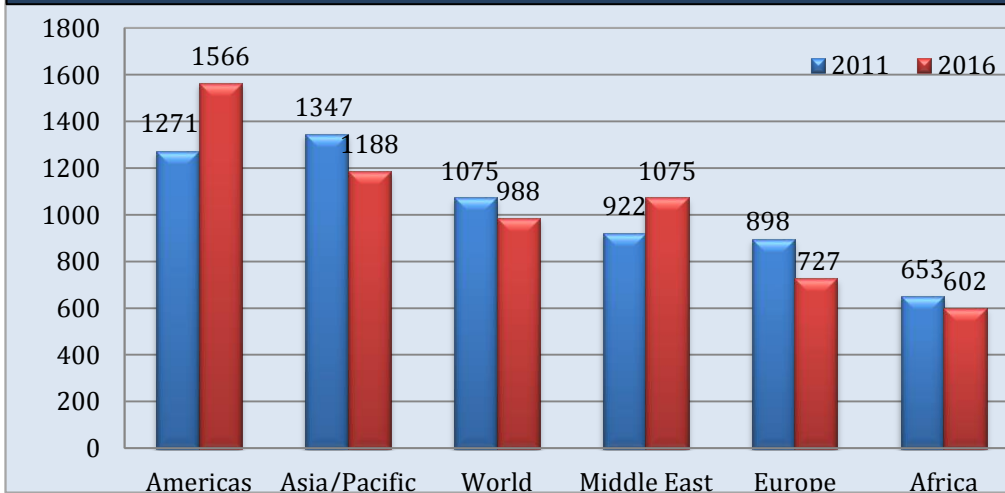
In 2014, worldwide tourist arrivals reached 1,137 million and tourism receipts went up to \$1,252 billion. America and Asia & Pacific recorded the highest growth rates in terms of international tourist arrivals, 8.5 per cent and 6.1 per cent, respectively. In the same year, Europe recorded a positive growth rate in international tourist arrivals (1.7 per cent). The Middle East and Africa experienced difficult times due to social movements and increased safety & security concerns that resulted in the diversion of travelling demand away from the Middle East and

Africa, explaining why a significant portion of the international tourism activity was concentrated within the other regions.

In 2015, international tourist arrivals continued to recover where international tourist arrivals grew by 4.5 per cent and reached 1,189 million. However, it is also observed safety and security concerns in some countries in the Middle East and Africa regions affected the overall tourism performance of these two regions. As a result, international tourist arrivals continued to display a negative trend or a growth rate less than 1 per cent in these regions.

As of 2016, international tourist arrivals hit 1,235 million and tourism receipts reached \$1,220 billion, corresponding to 3.9 per cent and 2 per cent increase over the previous year, respectively. In particular, a strong growth was recorded in Asia & Pacific and Africa regions in terms of international tourist arrivals, that increased by 8.7 per cent and 8.2 per cent, respectively. As a reflection of the positive trends seen in tourist arrivals, tourism receipts also grew by 6.1 per cent in Africa and 4.9 per cent in the Asia & Pacific region (Figure 2.3 and Figure 2.4). On the contrary, international tourist arrivals and tourism receipts in Middle East contracted by 4.1 per cent and 1.0 per cent, respectively. In the same year, the highest growth rate in terms of international tourism receipts was observed in the Africa region (6.1 per cent) followed by Asia & Pacific (4.9 per cent) and Americas (2.5 per cent). International tourism receipts recorded negative growth rates in Europe (-0.5 per cent) and Middle East (-1.0 per cent) in 2016 (Figure 2.4).

Figure 2.5: International Tourism Receipts per Arrival 2011 vs. 2016 (US\$)



Source: Table A.1 and Table A.2 in the Statistical Appendix

Overall, while the trends in tourism receipts followed, in general, similar patterns to those in tourist arrivals, the average growth rates of tourism receipts and the regional shares in world total were somewhat different. The existing differences seen between the change in the international tourist arrivals and the change in the international tourism receipts can be attributed to the exchange rate differences and tourism strategies implemented (e.g. higher value added generating tourism). It is also evident that in economic hard times, international tourists typically do not react so much by refraining from travel, but by trading down; i.e. choosing, for instance, shorter stays in less expensive destinations closer to home, with travel and accommodation in lower categories. As economic recovery takes place they tend to spend more during their holidays and stay longer at their destinations. In this context, the growth rates of tourism receipts and tourist arrivals may differ remarkably stemming from the above-mentioned factors.

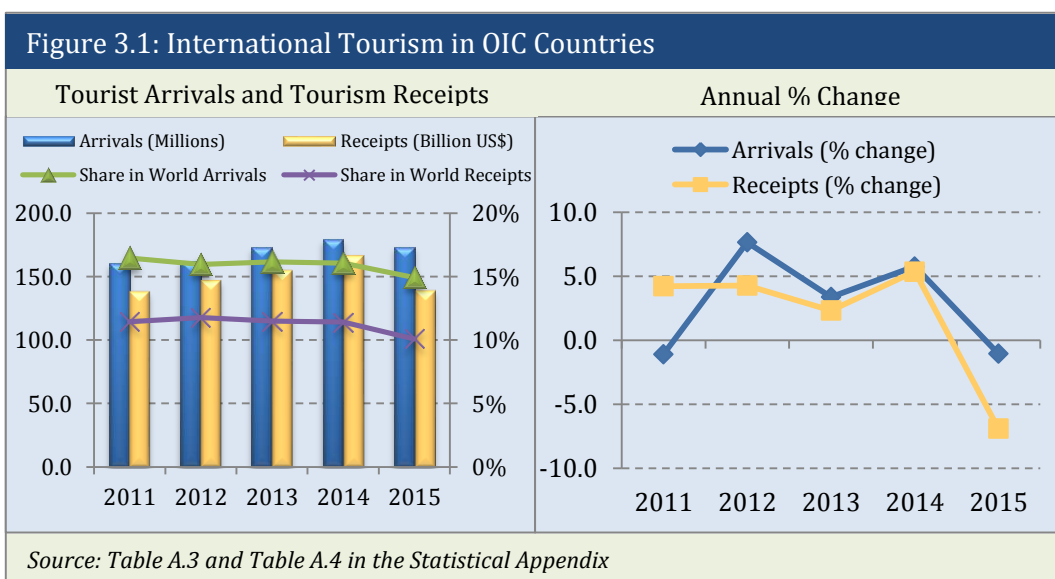
Two specific examples from the Americas and Asia & Pacific regions can be illuminating. Americas recorded an annual average growth rate of 5.1 per cent over the period 2011-2016 in tourist arrivals. In the same period, tourism receipts in Americas grew, on average, annually by 9.6 per cent, a rate which was significantly higher than the growth rate observed in tourist arrivals. On the other hand, in the same period, in Asia & Pacific the average annual growth rate calculated for tourist arrivals and tourism receipts were equal to 6.9 per cent and 4.2 per cent, respectively. The existence of these differences in growth of tourist arrivals and receipts is mainly due to the fact that the international tourism receipts per arrival vary as each region has its own touristic characteristics in terms of the length of stay of tourists, purpose of visit, geographical distance, etc. Moreover, the variations in exchange rates affect the value of tourism receipts that is measured in US\$ terms. In this context, the world tourism receipts per arrival in 2016 amounted to \$988 that was \$87 less than its value measured in 2011. The highest average tourism receipts per arrival was recorded in Americas (\$1,566), followed by the Asia & Pacific (\$1,188). In 2016, international tourism receipts per arrival in the Europe and Africa remained below the world average ranging from \$727 in Europe to \$602 in Africa (Figure 2.5). Compared with 2011, the Americas and the Middle East are the regions that increased the international tourism receipts per arrival the most in nominal terms. In other words, countries in Americas and Middle East, on average, were successfully generated more revenue per international tourist over the period 2011-2016. On the other hand, international tourism receipts per arrival went down in three regions namely Europe, Asia & Pacific and Africa in the same period. These results indicate that all across the globe countries should not only focus on increasing the number of tourist arrivals but also need to devise effective policies to serve more value-added tourism products and services for international visitors.

3 International Tourism in the OIC Countries

This section attempts to assess the performance and economic role of the international tourism sector in the OIC countries. The first sub-section examines the trends in the two traditionally used indicators in measuring international tourism, i.e. international tourist arrivals and international tourism receipts. The analysis is conducted at both the individual country and the OIC regional levels. The second sub-section assesses the economic role of the international tourism sector in the OIC countries. Finally, the third sub-section looks at, as much as the available relevant data allow, the state of intra-OIC tourism.

3.1 Tourist Arrivals and Tourism Receipts

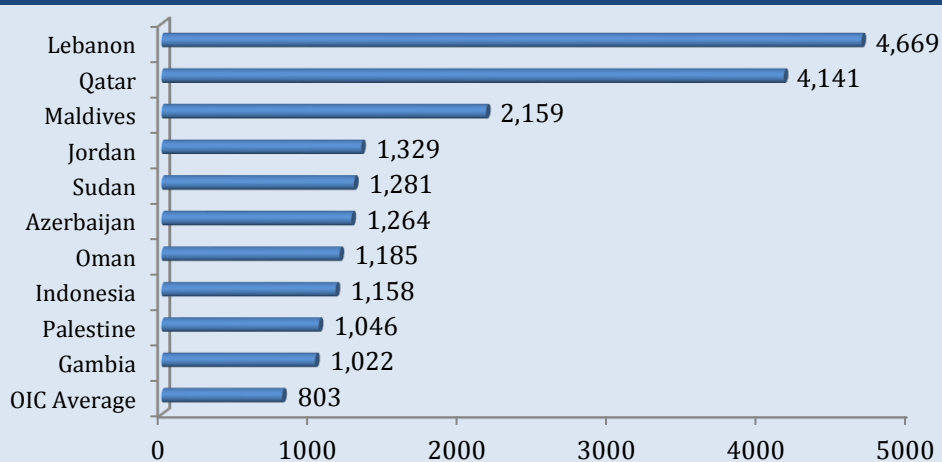
As shown in Figure 3.1, international tourist arrivals in the OIC countries, for which the data are available, recorded at 160.6 million in 2011, corresponding to a 16.5 per cent share in the total international tourist arrivals worldwide. These tourists generated \$138.7 billion as international tourism receipts in the OIC countries, corresponding to a 11.5 per cent share in the world's total tourism receipts. International tourist arrivals in the OIC region reached 173 million in 2013. The share of the OIC group in the world tourist arrivals also increased by 0.2 per cent and recorded at 16.2 per cent in 2013. International tourism receipts of the OIC group amounted to \$155.3 billion in the same year, corresponding to a share of 11.5 per cent in the world.



The number of international tourist arrivals in the OIC region decreased from 179.4 million in 2014 to 173.4 million in 2015. In the same period, international tourism receipts in the OIC countries went down from \$167 billion to \$139 billion. Overall, the share of the OIC countries in total international tourist arrivals decreased from 16.5 per cent in 2011 to 14.9 per cent in 2015. The share of the OIC countries in world's total tourism receipts went down from 11.5 per cent in 2011 to 10.1 per cent in 2015.

In 2015, the continued regional political crises across different geographical regions in the globe negatively affected the tourism industry. Many OIC countries also did not stay immune from these changes where the total number of tourist arrivals, tourism receipts as well as the share of the OIC group in the world tourism industry regressed. Different OIC countries were affected in different patterns and intensities. Some were hit by sudden and dramatic falls like, and others were marked by modest yet continuous trends. On the other hand, the on-going recovery in the world economy, especially in the economies of the major tourist-generating regions of the Americas and Europe led to improved tourism figures in some OIC countries in 2015.

Figure 3.2: International Tourism Receipts per Arrival in OIC Countries (US\$ in 2015)



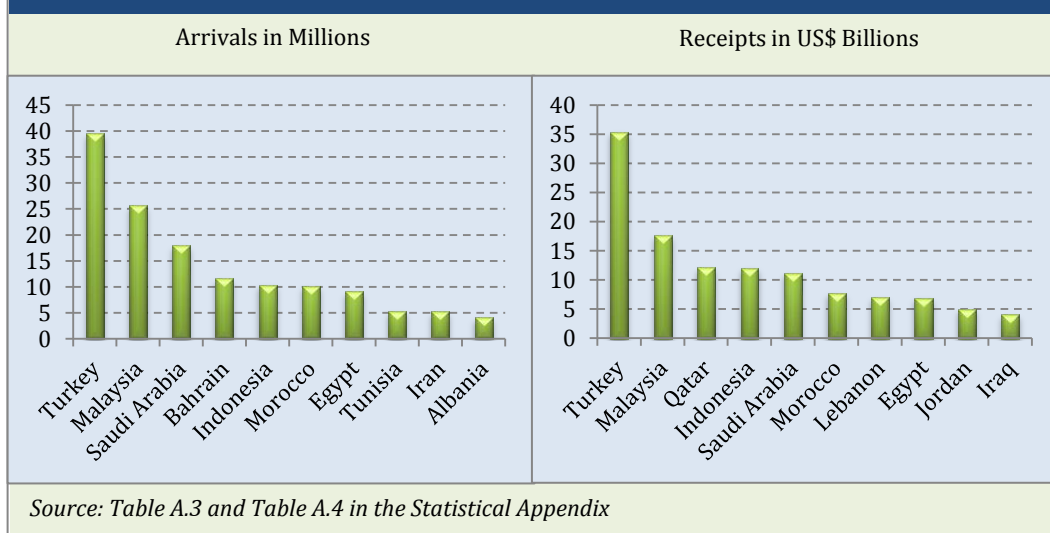
Source: Derived from Table A.3 and Table A.4 in the Statistical Appendix

While, in absolute terms, the trends in international tourism receipts were generally similar to those in international tourist arrivals, the shares of the individual countries in the total OIC international tourism receipts as well as the average growth rates of those receipts were somewhat different. This is due to the fact that receipts per arrival vary as each country has its own tourism characteristics in terms of length of stay of tourists, purpose of their visit,

geographical distance, types of shopping, etc. For example, as shown in Figure 3.2, the OIC average tourism receipts per arrival in 2015 amounted to \$803. In the same year, the highest receipts per tourist arrival were recorded in Lebanon (\$4,669) followed by Qatar (\$4,141), Maldives (\$2,159), Jordan (\$1,329), Sudan (\$1,281), Azerbaijan (\$1,264), Oman (\$1,185), Indonesia (\$1,158), Palestine (\$1,046), and Gambia (\$1,022).

At the individual country level, it is observed that international tourism activity, in terms of both tourist arrivals and tourism receipts, is still concentrated in a few countries. In 2015, Turkey, Malaysia and Saudi Arabia were identified as three top-performer OIC countries in terms of international tourist arrivals. In the same year, top-performer 10 OIC countries together hosted 139.2 million international tourists, corresponding to a share of 80.3 per cent of the total OIC tourist arrivals in 2015 (Figure 3.3, left).

Figure 3.3: Top 10 Tourist Destinations and Tourism Earners in 2015



Similarly, international tourism receipts in the OIC countries are also concentrated in a few countries, the majority of them being the main OIC tourist destinations shown in Figure 3.3 (left). In descending order, Turkey, Malaysia, Qatar, Indonesia, Saudi Arabia, Morocco, Lebanon, Egypt, Jordan and Iraq were the top-performer 10 OIC countries in terms of tourism receipts in 2015 (Figure 3.3, right). This group of OIC countries earned \$121.9 billion as international tourism receipts in 2015, corresponding to a share of 87.5 per cent of the total OIC tourism receipts in that year.

3.2 The Economic Role of International Tourism in the OIC Countries

In this sub-section, an attempt is made to assess the economic role of the international tourism sector in the economies of the OIC countries. In this regard, the figures on the contribution of tourism to employment, GDP, and exports are analysed. Moreover, the balance of international tourism data are calculated and reported by deducting the international tourism expenditures from the international tourism receipts, for each individual OIC country for which the relevant data are available. The net contribution of the international tourism sector to the economies of OIC countries is then examined by relating the balance of international tourism as a percentage of the GDP of each country. The sector is also evaluated as a source of foreign exchange earnings by relating the international tourism receipts in each country, as a percentage, to its total merchandise exports in the same period, in addition to the share of travel exports in all service exports in the OIC group.

Figure 3.4 demonstrates the contribution of international tourism in the economies of the OIC countries in comparison with the world average based on a dataset obtained from the World Travel & Tourism Council (WTTC). The total contribution of international tourism to employment in the OIC group followed a stable pattern and ranged between 6.5 and 6.4 per cent over the period 2012-2017. It is estimated that it will stay at the level of 6.4 per cent in 2018 as well. In the world, this number increased from 9.1 per cent in 2012 to 9.7 per cent in 2017. In other words, the contribution of the tourism sector to employment is still under its potential in the OIC group when it is compared with the world average. On the other hand, the total contribution of tourism to GDP (including both its direct and indirect contributions) increased in the OIC group as well as in the world over the period 2012-2017. The total contribution of tourism to GDP in the OIC countries, on average, increased from 7.9 per cent in 2012 to 8.6 per cent in 2017, where the world average also went up from 9.5 per cent to 10.2 per cent in the same period.

Figure 3.4: Contribution of International Tourism in the Economy

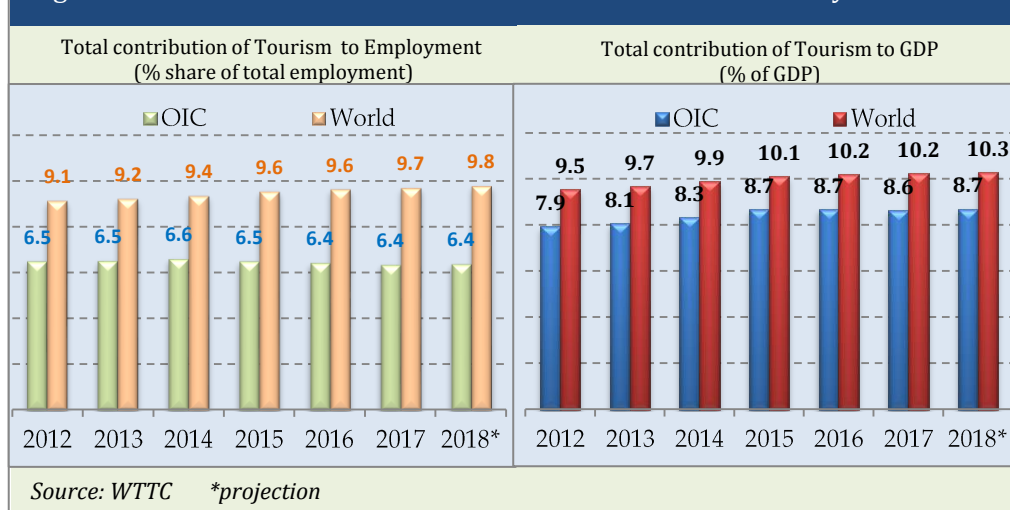
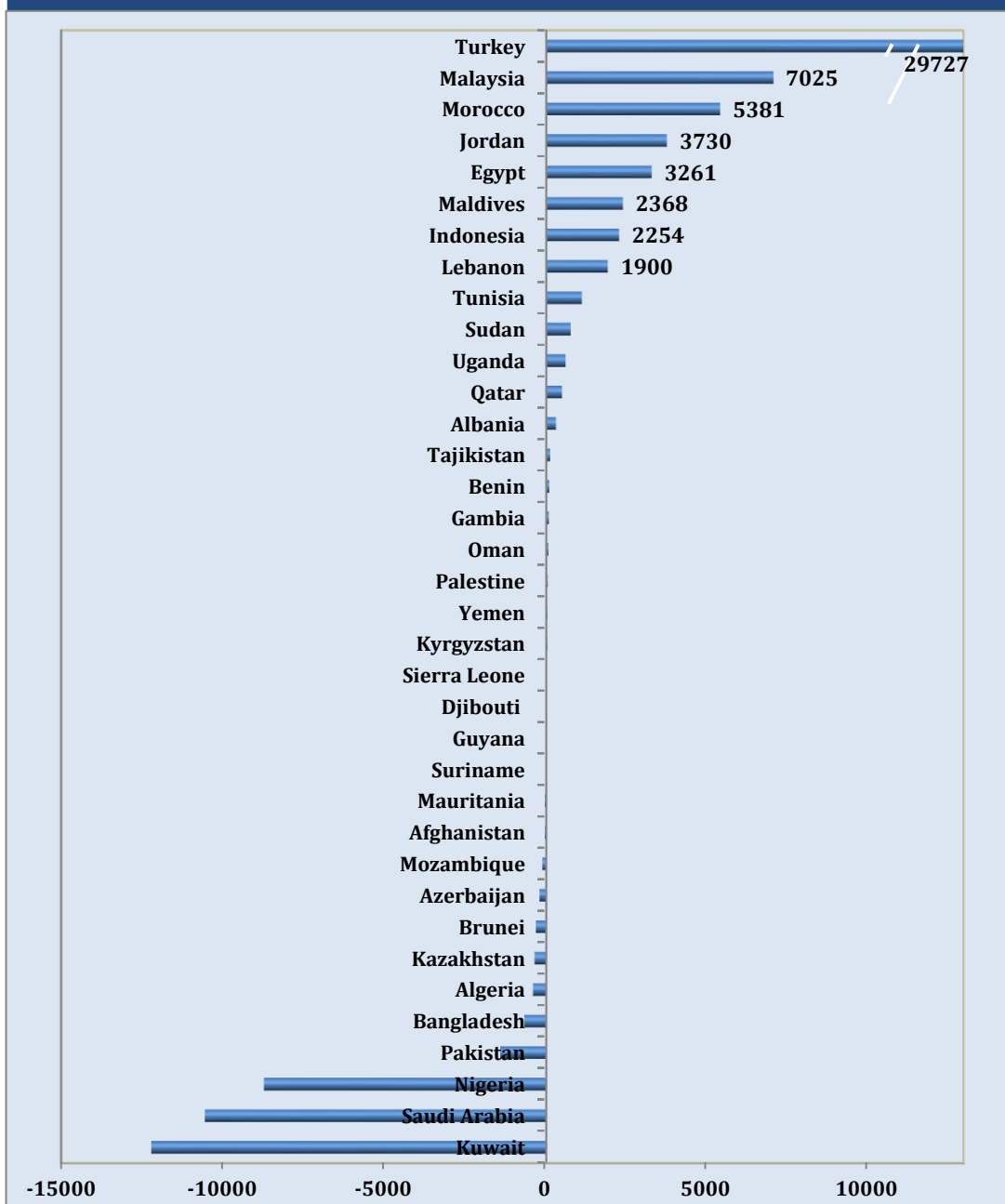


Figure 3.5: Balance of International Tourism in OIC Countries (Million US\$ in 2015)



Source: Table A.4 and Table A.5 in the Statistical Appendix

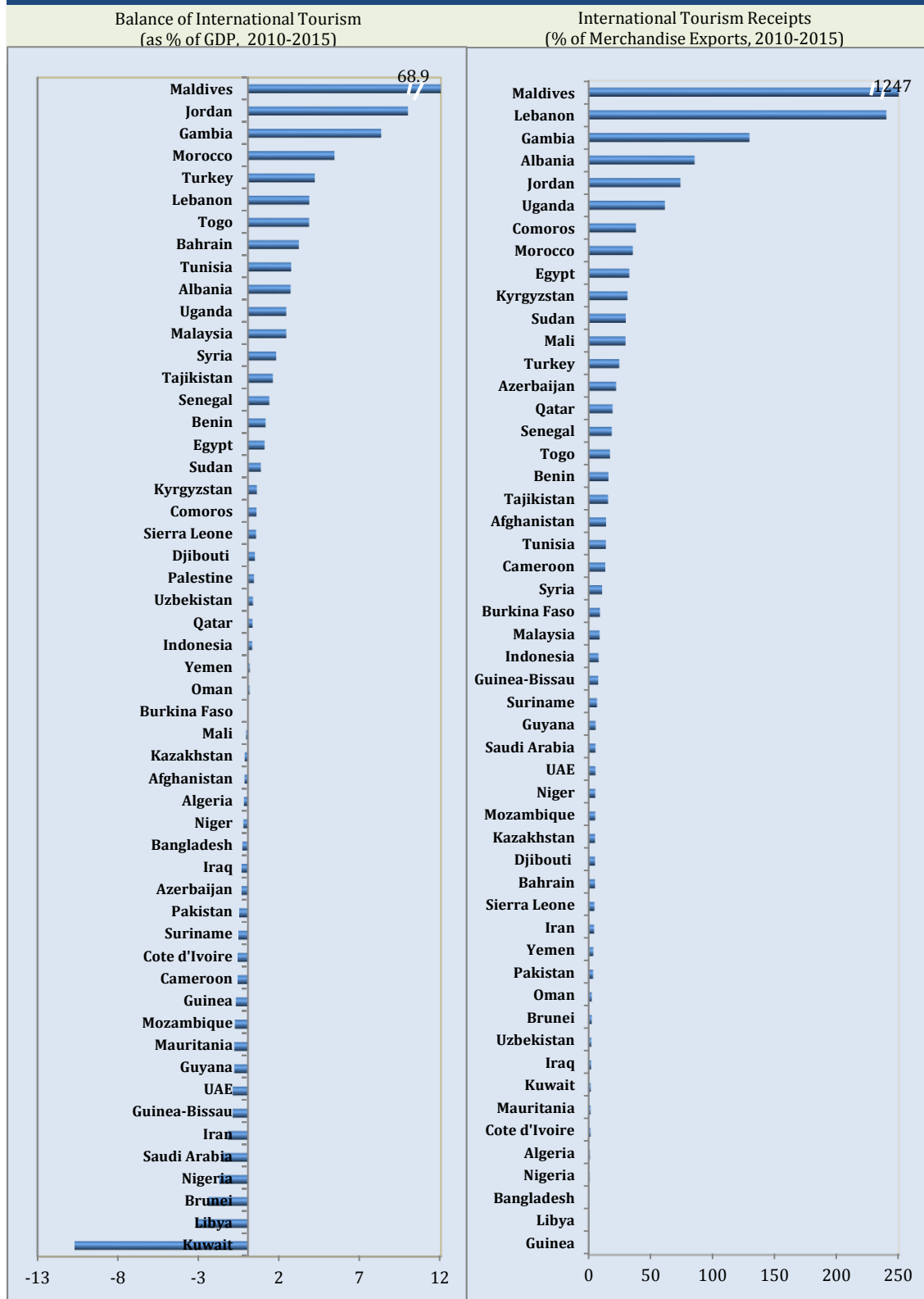
Figure 3.5 displays the balance of international tourism in the OIC countries in 2015. Among data available 36 OIC countries, 22 OIC countries had a surplus in which their tourism receipts exceeded tourism expenditures. Turkey, Malaysia and

Morocco were three OIC countries with the highest amount of surplus. Rather, the balance of international tourism in 14 OIC countries was found to be negative. Among these OIC countries, Kuwait, Saudi Arabia and Nigeria were three countries with the highest amount of deficit. It seems that a considerable number of OIC countries need to develop effective tourism policies to generate a surplus as a result of international tourism activities rather than a deficit (calculated based on the data in Table A.4 and Table A.5 in the Statistical Appendix).

When examining the economic role of the international tourism sector in the economies of the OIC countries regarding its *net* contribution to the GDP of each country, the picture reflects a widely different situation (Figure 3.6, left). The economic role of the international tourism sector in the economies of the OIC countries is neither a function of the size nor the level of affluence of the economy. With 68.9 per cent of GDP, international tourism is the major economic activity in Maldives that has the highest share observed among OIC countries. Figure 3.6 also shows that the international tourism activity plays a relatively important role compared to the size of the economy in 8 OIC countries for which the balance of international tourism accounts for more than 3 per cent of their GDP. This group includes some of the OIC's main tourism destination and earner countries (e.g. Jordan, Lebanon, Morocco and Turkey). In contrast, international tourism activity is found to have a net negative contribution in the economies of 24 OIC countries for which the data are available over the period 2010-2015.

On the other hand, when the international tourism sector is evaluated as a source of foreign exchange earnings by relating the international tourism receipts in each country, as a percentage, to its total merchandise exports, Figure 3.6 (right) indicates that international tourism activity plays a more significant role in the economies of the OIC countries as a source of foreign exchange earnings. According the last year available data over the period 2010-2015, the highest number of international tourism receipts as percentage of merchandise exports accounted in Maldives (1247.5 per cent) and followed by Lebanon (240.0 per cent) and the Gambia (129.6 per cent). Yet, in 16 OIC countries, international tourism receipts were still accounted for less than 5 per cent of their total merchandise exports (Table A.8 in the Statistical Appendix).

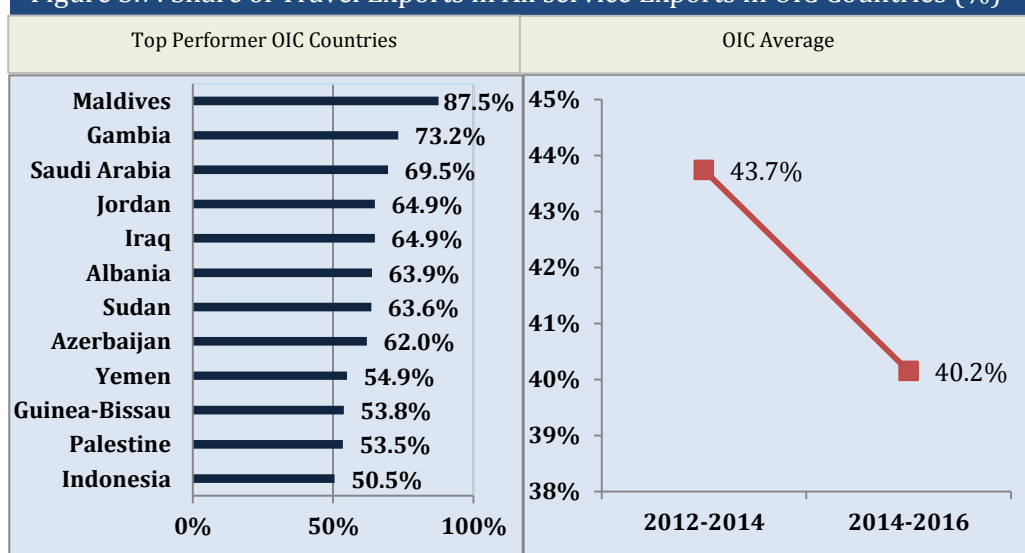
Figure 3.6: Role of International Tourism in the Economy



Source: Table A.7 and Table A.8 in the Statistical Appendix

Finally, the economic importance of the tourism industry can be assessed by looking at the share of travel exports in all service exports. According to Figure 3.7 (left), among data available OIC countries, the highest contribution of travel exports in all service exports was observed in Maldives with a 87.5 per cent share based on the last year available data over the period 2012-2016. It was followed by the Gambia (73.3%), Saudi Arabia (69.5%), Jordan (64.9%) and Iraq (64.9%). In 12 OIC countries this share exceeded 50 per cent threshold. However, in the OIC countries, on average, the share of travel exports in all services exports seem to record a slight decrease over time. Between two periods (2012-2014 and 2014-2016), the average of the OIC countries went down from 43.7 per cent to 40.2 per cent.

Figure 3.7: Share of Travel Exports in All service Exports in OIC Countries (%)



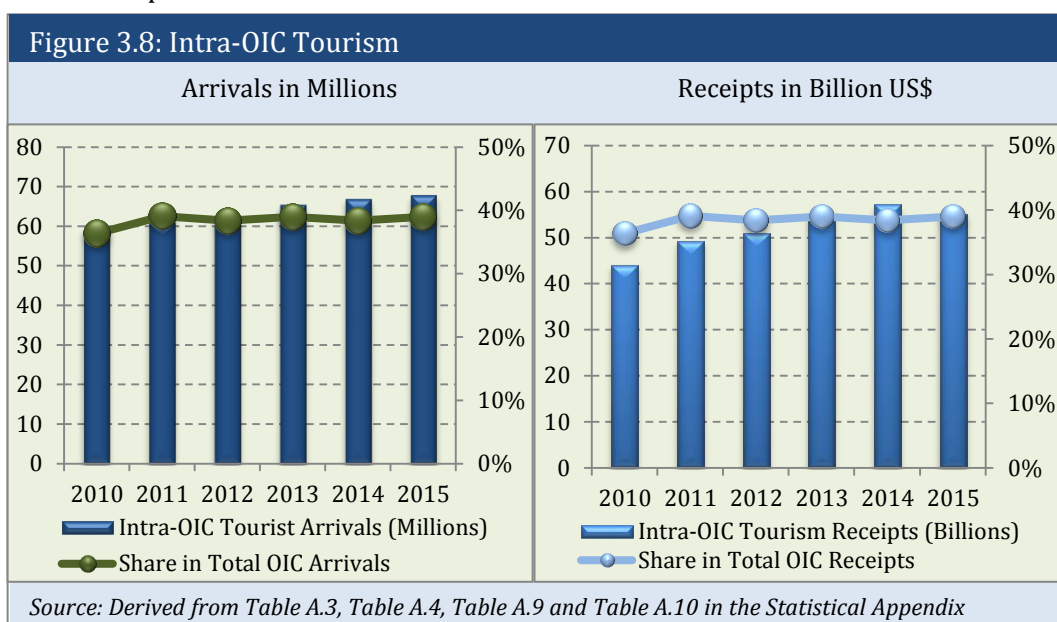
Source: ITC Trademap 2017

3.3 Intra-OIC Tourism

As in other dimensions of the economic integration (e.g. trade and investment), intra-OIC tourism trends can be a good indicator to assess the level of economic integration among the OIC countries. Higher levels of intra-OIC tourism in terms of both intra-OIC tourist arrivals and intra-OIC tourism receipts indicate an improvement in intra-OIC economic cooperation.

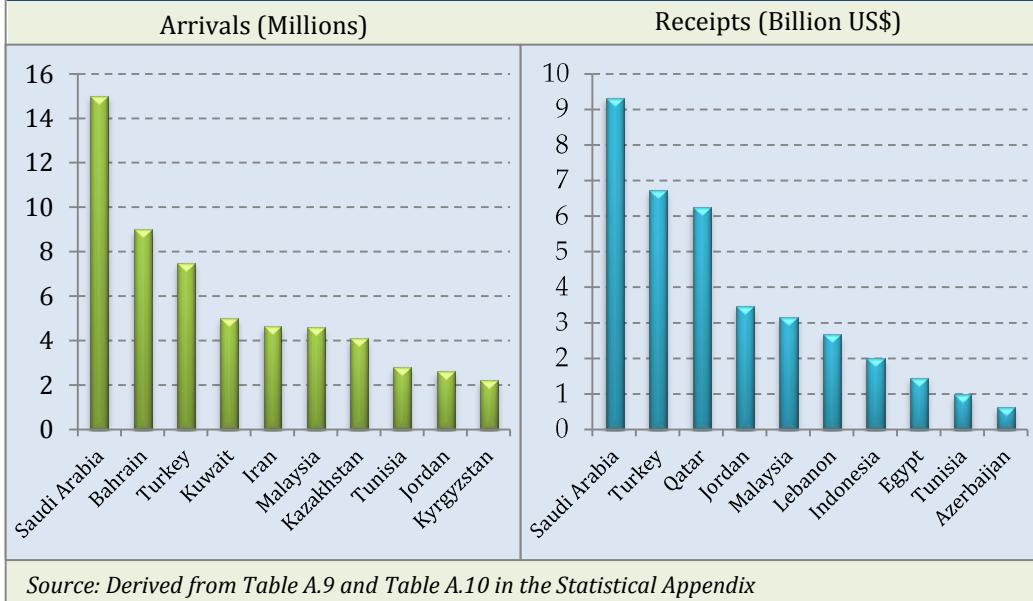
Figure 3.8 presents the trends on the intra-OIC tourist arrivals and tourism receipts between 2010 and 2015. In 2010 with the modest recovery in the global markets after the crisis, intra-OIC tourist arrivals measured as 59.1 million, corresponding to 36.4 per cent of the total international tourist arrivals in the OIC countries for which the relevant data are available. In 2011, intra-OIC tourist arrivals increased to 60.9 million arrivals and the share of intra-OIC tourist arrivals in total OIC

international tourist arrivals reached 39.1 per cent. In 2012, intra-OIC tourist arrivals continued to go up and hit 65.3 million arrivals, corresponding to a 39 per cent share in total OIC tourist arrivals. The growth trend in intra-OIC tourism arrivals went on in 2014 and 2015. Intra-OIC tourist arrivals climbed from 66.8 million in 2014 to 67.7 million in 2015 as a result the share of intra-OIC tourist arrivals in total arrivals increased from 38.8 per cent to 39 per cent in this period. A similar trend was also observed in the case of the intra-OIC tourism receipts during the period under consideration (Figure 3.8). A strong growth took place over the period 2010-2015. Intra-OIC tourism receipts climbed from \$44.1 billion in 2010 to \$55.1 billion in 2015. In the same period, the share of intra-OIC tourism receipts in total OIC receipts also recorded a meaningful increase that went up from 36.4 per cent to 39 per cent.



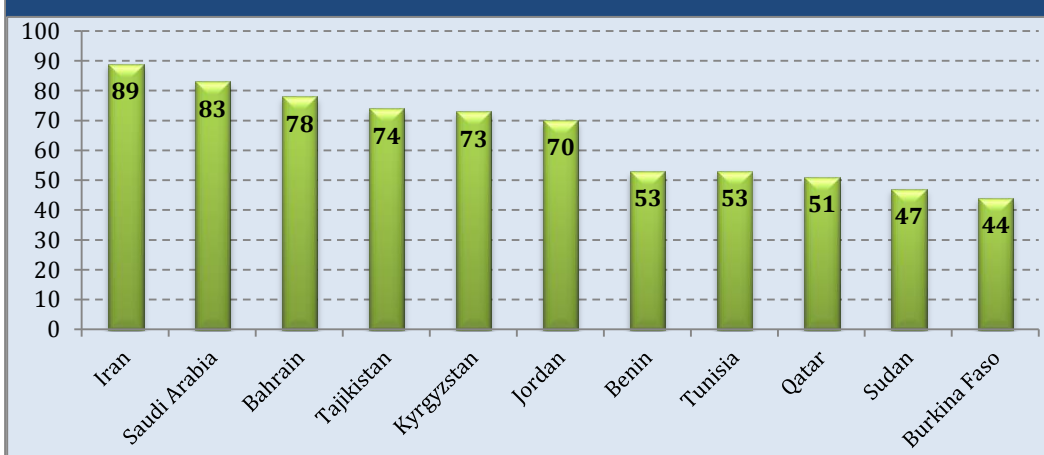
At the individual country level, it is observed that the intra-OIC tourist arrivals are concentrated in a few countries. Figure 3.9 presents top-ten performer OIC countries in terms of intra-OIC tourist arrivals and tourism receipts in 2015. In descending order, Saudi Arabia, Bahrain, Turkey, Kuwait, Iran, Malaysia, Kazakhstan, Tunisia, Jordan and Kyrgyzstan were the top-ten intra-OIC tourism destinations in 2015 (Figure 3.9, left). Together, they hosted 57.6 million tourists from the OIC countries, corresponding to 85 per cent of the total intra-OIC tourist arrivals in that year. In descending order, Saudi Arabia, Turkey, Qatar, Jordan, Malaysia, Lebanon, Indonesia, Egypt, Tunisia and Azerbaijan were the top-ten intra-OIC tourism earners in 2015 (Figure 3.9, right). Altogether these ten OIC countries earned \$36.7 billion, corresponding to 66.6 per cent of the total intra-OIC tourism receipts.

Figure 3.9: Top 10 Intra-OIC Tourist Destinations and Tourism Earners in 2015



It is also observed that tourist arrivals from other OIC countries accounted for the bulk of the total international tourist arrivals in some OIC countries in 2015, such as Iran (89 per cent), Saudi Arabia (83 per cent), Bahrain (78 per cent), Tajikistan (74 per cent), Kyrgyzstan (73 per cent) and Jordan (70 per cent) (Figure 3.10). Yet, this ratio is still below the level of 20 per cent in many OIC countries. It becomes evident that in the OIC countries located especially in the Middle East and Central Asia regions intra-OIC tourist arrivals represent relatively a higher share in total tourist arrivals.

Figure 3.10: Top 10 OIC Countries in terms of the Share of Intra-OIC Tourist Arrivals as a Percentage of Total Tourist Arrivals in 2015



These figures indicate that a significant amount of people travel across neighbouring OIC countries in their respective regions for touristic reasons. However, possession of an extremely high share of intra-OIC tourism arrivals (in total tourism arrivals) may imply that a country is highly dependent on tourist arrivals originating from a few countries mostly located in the same region. Therefore, in case of any turbulence (social, political, or economic) in one country or between two OIC countries in the same region can hit tourism figures severely. In this context, in order to reduce such a risk, it is important to consider for those OIC countries that are highly dependent on a few countries in the tourism sector to follow some tourism diversification strategies in order to host more tourists from different OIC geographical regions.

4 New Directions in the Tourism Sector: Islamic Tourism in the OIC Countries

Over the last two decades, Islamic life style market has been growing as sharia'h compliant products and services (e.g. halal food, Islamic tourism and Islamic finance) have become an important component of the global economy. With an increasing awareness and expanding numbers of Muslim tourists, many tourism industry players have started to offer special products and services, developed and designed in accordance with the Islamic principles, to cater the needs and demands of these tourists. Nevertheless, despite attracting significant interest across the globe, Islamic tourism is relatively a new concept in both tourism theory and practice. Not surprisingly, Islamic tourism activity remained highly concentrated in Muslim majority countries of the OIC, which are currently both the major source markets for the Islamic tourism expenditures and popular destinations. Islamic tourism is a natural-fit for these countries as the majority of them already have basic infrastructure and environment in place to cater for the specific needs of Muslim tourists, and thus, have a comparative advantage over the others. Therefore, it is true to believe that, if planned and managed properly, Islamic tourism could play a vital role in revitalising the economic development and growth and hence, spread the prosperity across the OIC countries.

Against this backdrop, this section aims to provide a candid theoretical discussion on the definitions and dimensions of Islamic tourism by sifting through the tourism literature and reviews the emergence and status of Islamic tourism industry in the world in general and in the OIC countries in particular by analysing the latest available information and statistics. The section also provides a brief discussion on major challenges and opportunities for the development of Islamic tourism in the OIC countries.

4.1 Islamic Tourism and its Components

Islam and Tourism

Travelling and journey are highly recommended by the Qur'an. Allah asked us to travel through the earth to take the lessons from His creation that He offers to us in His mercy (*Al-Quran 29:20*). It is a well-established fact that religion has influence on the day-to-day activities of Muslims, whether at home or travelling, and thus it shapes the choice of a destination for discretionary purposes and what is done at the destination (Jafari and Scott, 2014). Islam recognizes people's right to move from one place to other and encourages travelling for beneficial purposes including Hajj and Umrah (literally the higher and lesser pilgrimages, respectively), health

and medication, education, business, trade, entertainment, and fun. However, words like “fun” and “entertainment” should be interpreted with caution as Muslims are allowed to seek fun and entertainment only in a way that does not go beyond the rules and obligations of Islamic Sharia’h (Saad et al, 2010). Therefore, in this context, tourism policy, development objectives and the management and operation of the industry will be greatly influenced by the Islamic principles (Scott and Jafari, 2010).

Islamic Tourism: Definitions and Dimensions

As it is evident from the name, Islamic tourism is mainly targeting people with Islamic beliefs in particular, though it could also have a universal appeal even for the non-Muslims due to a multitude of reasons like fair pricing, peace and security, family-friendly environment and hygiene etc. Islamic tourism as a concept has been used with different names and connotations in the tourism theory and practice. Halal tourism, Sharia’h Tourism and Muslim-friendly tourism are the most common terms, which are used alternatively. However, none of these terminologies has a universally understood definition (Crescent Rating, 2015). Moreover, there are some related terms such as ‘Halal hospitality’, ‘Sharia’h compliant hotels’, and ‘Halal friendly travel’ concerning the services in this sector.

Box 4.1: Major Components of Islamic Tourism

Halal Hotels: Some of the main indicators of an Islamic hotel include: No alcohol, gambling etc.; Halal food only; Quran, prayer mats and arrows indicating the direction of Mecca in every room; Beds and toilets positioned so as not to face the direction of Mecca; Prayer rooms; Conservative staff dress; Islamic funding; Separate recreational facilities for men and women.

Halal Transport (Airlines): Major indicators for halal transport include: cleanliness; non-alcoholic drinks; and publications which are coherent with Islam.

Halal Food Premises: Foods that served in a restaurant have to be halal. All animals must be slaughtered according to Islamic principles. No alcoholic drinks should be served in the premise.

Halal Tour Packages: The content of the tour packages must be based on an Islamic themed. The Islamic tour packages include visits to the mosques, Islamic monuments and promote and event during the Ramadan.

Halal Finance: The financial resources of the hotel, restaurant, travel agency and the airlines have to be fit with Islamic principles. In general, Islamic finance requires participation in sharing the profit and loss among of all parties who involved in this finance enterprise. Islamic finance also prohibits interest.

Source: Adapted from Akyol and Kilinc (2014)

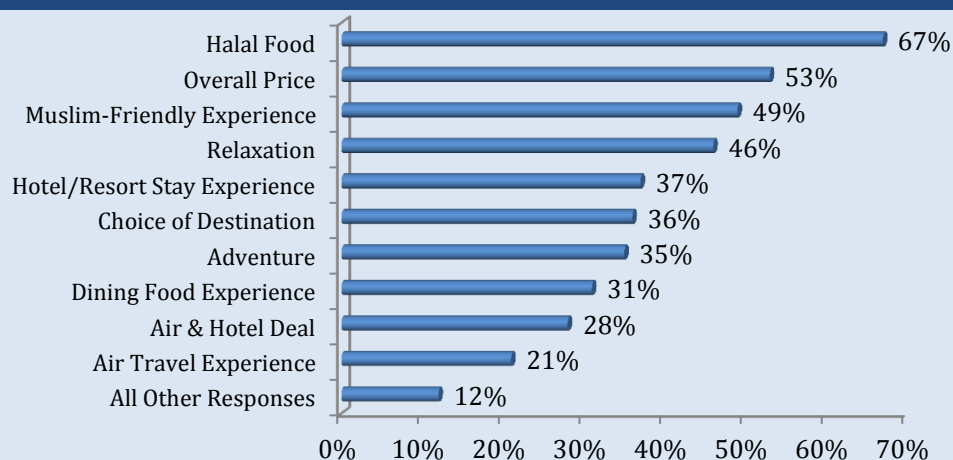
The major components of Islamic tourism are similar to those of conventional tourism like hotels, restaurants, logistics, finance, and travel packages. Evaluation of the value of tourism products in case of Islamic tourism, however, entails a completely different process due to the requirements of the Islam. These requirements are called Sharia'h-principles and at the simplest level, these principles "prohibit adultery, gambling, consumption of pork and other Haram (forbidden) foods, selling or drinking liquor and dressing inappropriately." In addition, a typical Muslim is expected to do regular prayers in clean environments and fast in Ramadan. In Islamic teachings, Muslims are also expected to abstain from unnecessary consumption and indulgence. In principle, Islamic tourism is about satisfying tourists looking for a destination that can fulfil their needs without being offensive in any way. It covers all tourism related goods and services that are designed, produced and presented to the market according to the Islamic rules (Hamza et al., 2012). Muslim tourists usually travel with family members and therefore, this concept is tailored around the travel needs of Muslim tourists who predominately seek a family friendly environment (Dinar Standard, 2015). All destinations that provide services and facilities that cater to at least some of the faith-based needs of Muslim visitors are categorised as 'Muslim Friendly Destinations' (Crescent Rating, 2015). At these destinations, tourists can count on feeling safe and secure, and can enjoy family-centred halal activities and have good time without worry.

The motivation for the Muslims to participate in tourism activity can be general (e.g., conducting business, visiting friends or relatives), pursuing other personal goals and activities (e.g., education, shopping) and pleasure, and/or specific Islamic motivations (e.g., spreading the message of Islam, Islamic values and culture, worshipping Allah (through Hajj and Umrah), strengthening the bond of silat al-rahim (fraternity) etc. Most of the general motivations are common for Muslims and non-Muslims. However, certain motivations for tourism which provoke pure hedonism and lavishness are not acceptable according to Islamic doctrine and these motivations can be considered non-Islamic or haram (Duman, 2011).

There is also a wide diversity in awareness and adoption of various Islamic practices by Muslim travellers. A significant number of Muslim tourists travel to global non-Muslim destinations such as Europe and adjust to any limitations by seeking alternatives to Halal Food, as well as other religious considerations such as prayer spaces, etc. Meanwhile, a big segment travelling globally is also seeking options that address their religious considerations (Thomson Reuters and Dinar Standard, 2015). In a global survey jointly conducted by Dinar Standard and Crescent Rating, halal food, overall price and Muslim-friendly experience were ranked among the top-3 Muslim tourist market needs (Figure 4.1). A survey reported in COMCEC (2016) look at the factors that influence the choice of Muslim tourists regarding destinations. According to the survey, the existence of Muslim-

Friendly Tourism (MFT) Services (65 per cent of the respondents), total cost of these services (48 per cent of the respondents) and the friendliness of locals (31 per cent of the respondents) were listed as the top-3 extremely important factors. On the other hand, geographical proximity and availability of sports activities were identified as the factors that influence the decision of Muslim tourists the least among nine factors asked in the survey (Table 4.1).

Figure 4.1: Main Factors that Affect the Decision of Muslim Tourists When Travelling For Leisure



Source: DinarStandard, 2015

Table 4.1: Relative Importance of Factors that Influence Choice of Muslim Tourists

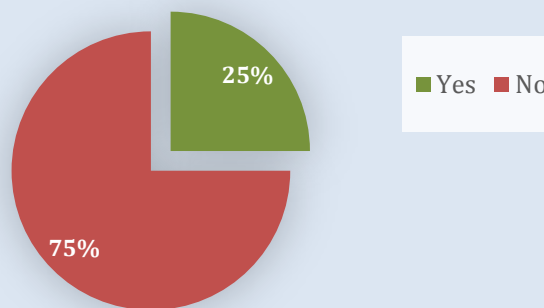
	Extremely Important	Very Important	Important	Neutral	Not Important
Muslim Friendly Tourism Services	65.1	21.3	8.8	3.7	1.2
Total Cost	47.9	32.6	16.4	2.8	0.4
Friendliness of Locals	31.5	37.6	22.6	7.2	1.1
Islamic Heritages Sites	27.1	28.5	23.8	16.6	4.1
Children Attractions/Activities	22.2	25.8	20.3	19	12.7
Cultural Attractions	15.2	29	29.9	20.5	5.4
Beach/Water Activities	12	24.6	25.8	26.4	11.2
Geographical Proximity	10.3	20.6	21.6	28.1	19.4
Sports Activities	5.2	18.2	19.1	35.4	22.1

Source: COMCEC (2016)

While a large segment of Muslim tourists look for these services, very few hotels, airlines and tourism destinations in fact tried to meet their demands. In fact for many service providers it is not an easy task due to lack of a common understanding among Muslim tourists and limited awareness among them on MFT standards. According to a survey reported in COMCEC (2017), only 25 per cent of Muslim tourists (responded to the survey) indicate that they have awareness of MFT standards (Figure 4.2).

Of course, while developing a strategy to address the Islamic tourism market, all major stakeholders like destinations, hotels and resorts, airlines and travel agencies need to consider the relative share of Muslim visitors to their destination. They also need to consider which faith related needs they will cater to. Basic needs such as Halal food, absence of alcohol, prayer spaces and Ramadan accommodation are a must for Muslim majority countries. Additional options include providing “women only” facilities, and incorporating Islamic heritage tours, among other options (Dinar Standard, 2015).

Figure 4.2: Muslim Tourists' Awareness of Muslim Friendly Tourism (MFT) Standards



Source: COMCEC (2017)

Box 4.2: Broad Concepts of Islamic Tourism

Economic concept: The economic concept for the Islamic tourism focuses on inclusion of new tourist markets and tourist destinations. This concept is the most widely discussed and understood in both Islamic and non-Islamic countries. Major tourism players, consider Muslim countries as one of the emerging tourist markets with huge economic, demographic and destination potentials. There are many regional and international forums like Islamic Conference of Tourism Ministers (ICTM) and the Arab Counsel of Ministers of Tourism (ACMT) to discuss and elaborate on economic dimensions of the Islamic tourism market. The third meeting of ICTM presented a new vision in this regard by adopting the “Riyadh Declaration”, which aims to ease the visa, enhance the intra-OIC tourism investment, organize joint marketing events and facilitate the revival of Islamic cultural heritage.

Cultural concept: The cultural concept for Islamic tourism includes visions and ideas that outline the inclusion of Islamic religious cultural sites in tourism programs with “pedagogical” and self-confidence building elements. It tries to encourage a reorientation inside the tourist destinations towards less consumption and “western culture” loaded sites towards more Islamic historical, religious and cultural sites.

Religious conservative concept: The religious conservative concept for Islamic tourism is based on the conservative interpretation and understanding of Islam. Merging elements of the extremely conservative Islamic lifestyle with the modern tourism industry could indeed present new tourism options, spaces, and spheres. For a growing conservative intra Arab and intra Muslim tourism market, the implementation of a religious conservative concept in tourism planning as an extra option and as an insertion into the existing mainstream tourism could indeed have a positive economic and social effect.

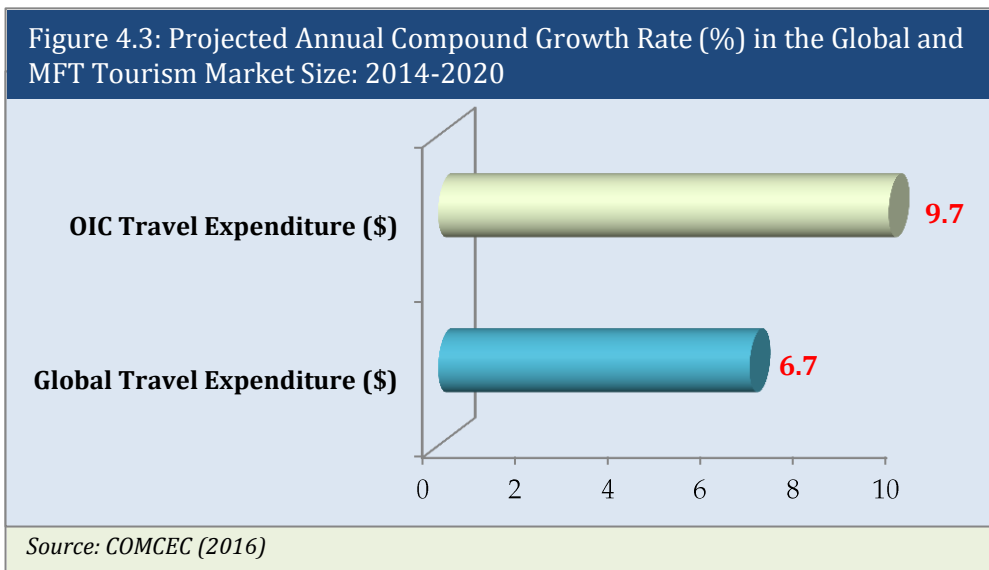
Source: Adapted from Al-Hamarneh and Steiner (2004)

4.2 State of Islamic Tourism in the OIC Countries

Islamic tourism is a recent phenomenon in the theory and practice of global tourism industry. Traditionally Islamic tourism was often associated with Hajj and Umrah only. However, recently there has been an influx of products and services designed specifically to cater the business and leisure related segments of Muslim tourists across the globe. The Muslim tourism market has witnessed rapid expansion over the years and emerged as one of the fastest growing segments of the global tourism market. Muslim tourism market (excluding the Hajj and Umrah expenditures of 20 to 25 billion US Dollars) has increased from around \$80 billion in 2006 to \$145 billion in 2014, corresponding to an impressive increase of 81 per cent. The size of the global Islamic tourism market grew by 4.9 per cent and

reached \$151 billion in 2015. In details, \$108.8 billion (corresponding to 72 per cent of the market size) of this spending was originated from the OIC member countries. On the other hand, Muslims living in non-OIC member countries spent about \$42.3 billion (corresponding to 28 per cent of the market size) on Islamic tourism activities. It is projected that the size of the market will reach \$243 billion in 2021 with an annualized growth rate of 8.3 per cent (Thomson Reuters and Dinar Standard, 2016).

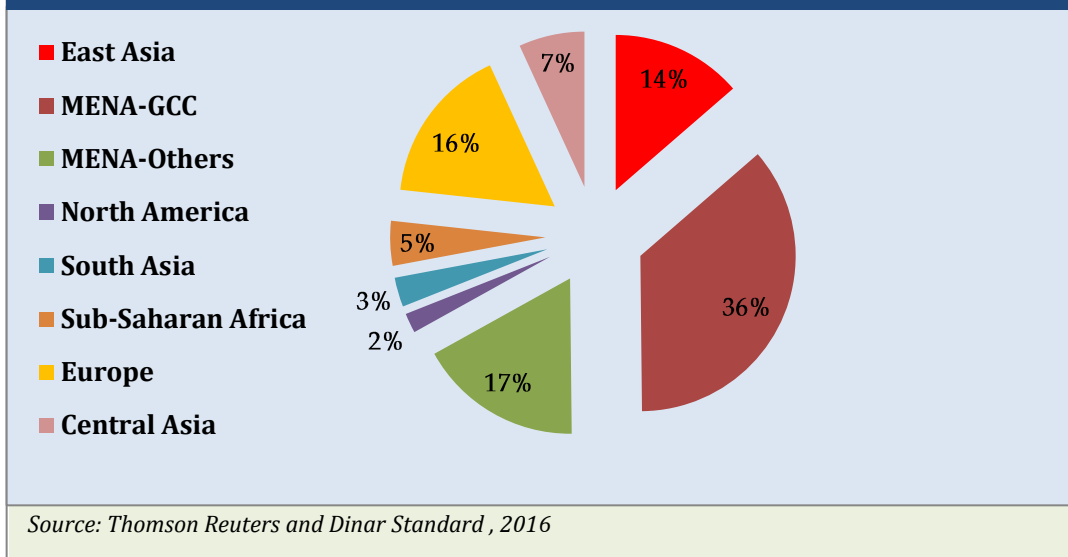
The projected annual compound growth rates provide an optimistic picture about the growth pattern of the Islamic tourism market in the OIC countries and the world. Over the period 2014-2020, it is projected that the growth rate in travel expenditures on Islamic tourism products and services of the OIC countries will be as high as 9.7 per cent that exceeds the global average of 6.7 by 3 percentage-points (Figure 4.3). In this regard, the OIC countries should not underestimate the economic importance of the Islamic tourism sector as a potential enabler for economic growth.



Growth in Islamic tourism activities are mainly driven by growth stemming from a few geographical regions in which several OIC countries are clustered. The regional breakdown of the global Islamic tourism market reveals that it is highly concentrated in the Middle East and North Africa (MENA) region (Figure 4.4). In 2015, the MENA region accounted for 53 per cent of the total out bound tourism expenditures made by the Muslim tourists. It was followed by Europe and East Asia (EA) with shares of 16 and 14 per cent, respectively. On the other hand, the shares of the four geographical regions stayed well below 10 per cent. The shares of these

regions were identified as follows: Central Asia (7 per cent) and Sub-Saharan Africa (5 per cent), South Asia (3 per cent), and North America (2 per cent).

Figure 4.4: Regional Breakdown of Muslim Tourism Market, 2015



Major Source Markets for Islamic Tourism

The OIC countries, as a group, constitute the major source market for the global Islamic tourism industry. According to Thomson Reuters and Dinar Standard (2016), 72 per cent of spending on Islamic tourism products and services was originated from the OIC countries in 2015. Nevertheless, Muslim tourists and tourism expenditures remained distributed unevenly across the OIC countries. Unsurprisingly, the resource rich OIC countries in the Middle East remained the major source markets for the Islamic tourism. Among these countries, members of the Gulf Cooperation Council (GCC) emerged as the star performers with a convincing 36 per cent share of global Muslim travel expenditures. It is worth noting that GCC countries represent only about 3 per cent of the global Muslim population (Thomson Reuters and Dinar Standard, 2016).

In 2015, the top-10 global Islamic tourism markets located in two continents: Asia and Africa. The primary top-10 source markets, in fact, are all OIC member countries except Russia (Table 4.2).

Saudi Arabia was ranked first with Muslim tourism expenditures of \$19.2 billion followed by the United Arab Emirates (\$15.1 billion), Qatar (\$11.7 billion), Kuwait (\$9 billion), Indonesia (\$9 billion) and Iran (\$7.2 billion). These top six source markets accounted for more than half of the total Muslim tourism expenditures. On the other hand, as a Muslim minority country, Russia (\$6.6 billion) ranked above

Turkey (\$5.3 billion) and Nigeria (\$4.8 billion) in terms of Islamic tourism expenditures in 2015.

Table 4.2: Top-10 Islamic Tourism Markets, 2015
(based on expenditures)

Rank	Country	Size (US \$ Billion)
1	Saudi Arabia	19.2
2	United Arab Emirates	15.1
3	Qatar	11.7
4	Kuwait	9
5	Indonesia	9
6	Iran	7.2
7	Malaysia	6.7
8	Russia	6.6
9	Turkey	5.3
10	Nigeria	4.8

Source: Thomson Reuters and Dinar Standard, 2016

Major Islamic Tourism Destinations

In the global tourism market, Europe is the most popular region in terms of number of arrivals. At the country level, France tops the list of the most popular destinations, followed by USA, Spain and China. Among the OIC countries, Turkey and Malaysia are the destinations that attract the highest number of tourists.

The above mentioned rankings of the top tourist destinations are largely based on the conventional tourism criteria without giving due consideration to the fundamental requirements of the Islamic tourism. Over the years, several institutions have embarked on initiatives to develop special criteria to evaluate the performance of tourism destinations with respect to the compliance with the requirements of the Islamic tourism and rank them accordingly. One of the most well-known initiatives is the *Master Card-Crescent Rating Global Muslim Travel Index (GMTI)*.

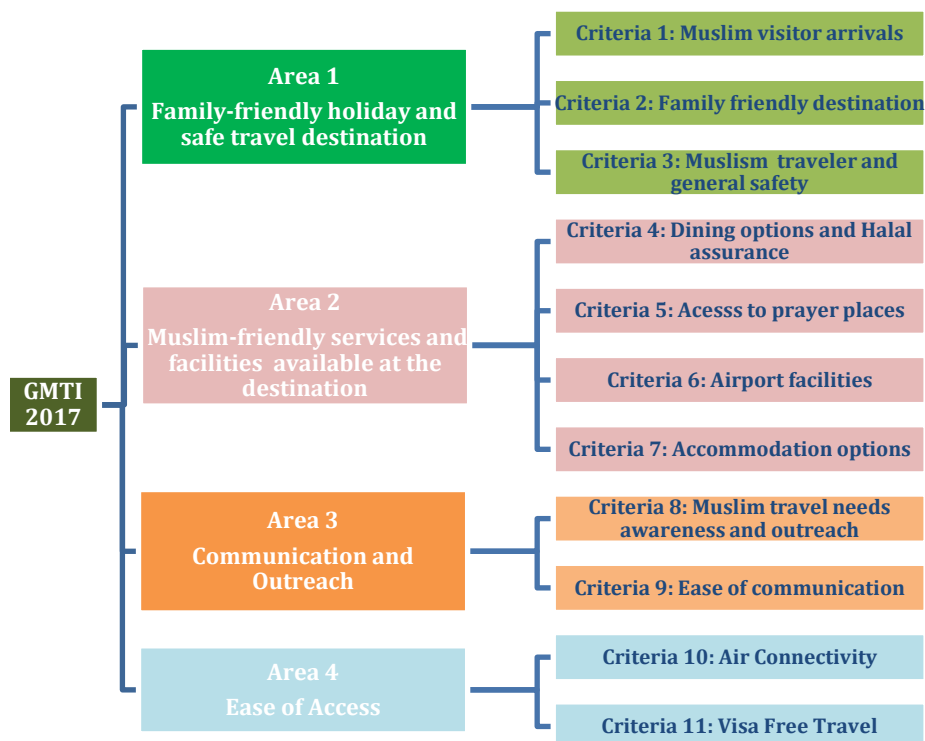
GMTI is made of several factors that constitute the Muslim tourists experience at a destination. As shown in Figure 4.5, this index looks at eleven criteria in four areas for a destination. Overall, 130 countries were studied and ranked for the GMTI

2017. The 130 destinations ranked in the GMTI 2017 cover 48 OIC countries and 82 non-OIC countries.

According to the results of the GMTI 2017, Malaysia topped the index ranking with a cumulative score of 82.5. It was followed by the United Arab Emirates with a score of 76.9 and Indonesia with a score of 72.6 (Table 4.3, left). In fact, nine out of the global top-10 Islamic tourist destinations are members of the OIC. Given the fact that the OIC countries have a comparative advantage mainly due to existing Halal ecosystem including Muslim friendly facilities and services, it is not a surprising result. Nevertheless, there is a strong need for proactive policies and measures in the OIC countries to capitalise on existing pro-Islamic tourism environment and converting their comparative advantage into competitive advantage. In fact, most of the OIC countries are lacking basic requirements and coherent strategies to fully maximise their attractiveness to Muslim tourists (Master Card and Crescent Rating, 2017).

In contrast, many Muslim minority countries have made significant progress in catering for the needs and demands of Muslim tourists. Among these countries Singapore, Thailand, UK, South Africa, and Hong Kong are the top-5 non-OIC Islamic tourism destinations (Table 4.3, right). With a cumulative score of 67.3, Singapore is ranked even above the OIC countries like Bahrain and Iran. In fact, majority of these non-OIC top Islamic tourism destinations are characterised by excellent tourism infrastructure and products and hence, sometimes they need very minimal changes in their strategies to cater to the needs of the Muslim tourists (Master Card and Crescent Rating, 2015).

Figure 4.5: Composition of the Global Muslim Travel Index (GMTI)



Source: MasterCard and Crescent Rating, 2017

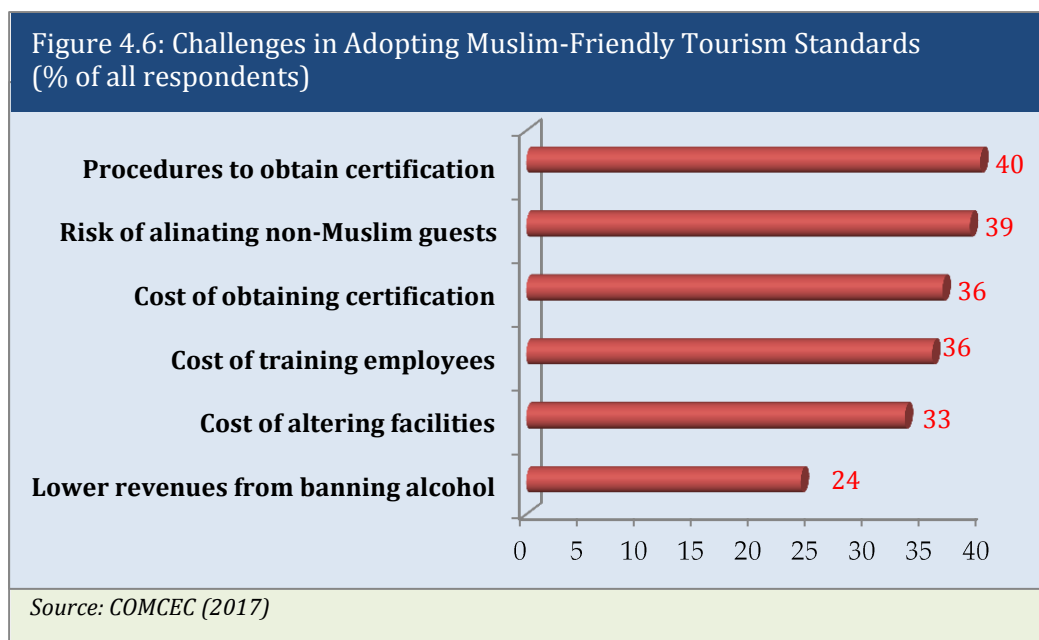
Table 4.3: Top 10 OIC and Non-OIC Islamic Tourism Destinations

GMTI 2017 Rank	OIC Destination	Score	GMTI 2017 Rank	Non-OIC Destination	Score
1	Malaysia	82.5	10	Singapore	67.3
2	United Arab Emirates	76.9	18	Thailand	61.8
3	Indonesia	72.6	20	United Kingdom	60
4	Turkey	72.4	30	South Africa	53.6
5	Saudi Arabia	71.4	31	Hong Kong	53.2
6	Qatar	70.5	32	Japan	52.8
7	Morocco	68.1	33	Taiwan	52.4
8	Oman	67.9	34	France	52.1
9	Bahrain	67.9	36	Spain	48.8
11	Iran	66.8	37	United States	48.6

Source: MasterCard and Crescent Rating, 2017

4.3 Challenges and Opportunities for Islamic Tourism

Islamic tourism is a very recent phenomenon. Despite all the positive developments, the Islamic tourism market is still fragmented by the diversity of the meaning of halal, income level, awareness level, and location. These are some of the main stumbling blocks that need to be addressed. A survey conducted with the representatives of the accommodation sector (i.e. hotel establishments) in the OIC countries is very illuminating. It was designed to identify the major challenges in having Islamic tourism standards in their accommodation sector in the OIC countries (COMCEC, 2017). According to the results, the procedures to obtain certification topped the list of challenges (40%) followed closely by the risk of alienating non-Muslim guests (39%) (Figure 4.6). Costs associated with Halal certification, training employees and altering facilities to offer Islamic tourism products and services were also cited by at least a third of the respondents. A quarter of the respondents (24 per cent) cited the loss of revenues from alcohol as one of the challenges in following an MFT standard. In fact, these results are useful and provide some hints on policy intervention areas to develop the Islamic tourism sector in the OIC countries.



Based on the existing literature and abovementioned COMCEC (2017) report, some of the specific challenges that limit the development of Islamic tourism in the OIC countries and available opportunities ahead of the OIC countries are listed as follows:

Challenges

Lack of unified and global standards and certification: There are no unified international halal standards and certification arrangement for the tourism industry. In fact, in the majority of the OIC countries, there is no official body available at the national level to certify hotels and destinations according to the Islamic requirements.

Financial Constraints: As a new emerging segment of global tourism industry, Islamic tourism has not received enough financial resources, perhaps, with growing number of success stories investors will give due attention to this niche segment by considering its potential and growing market size.

Gender: In many Muslim majority countries, female employment in the tourism sector is a problem due to various social and cultural reasons. A significant proportion of the global Muslim workforce is being affected by the existing gender-related arrangements that also constitute a hindrance for the development of the Islamic tourism market.

Differences in the influence of Islamic values and beliefs: There is significant variation across the OIC countries regarding the understanding and influence of the Islamic values and beliefs. These existing differences are also reflected in their tourism development policies. While, some OIC countries are more relaxed and welcoming towards the tourists, some others are more conservative and less interested.

Opportunities

Islamic tourism potential for economic growth: Provided the fact that many OIC countries already have basic infrastructure and environment for catering to the requirements of the Muslim tourists, they can benefit more from the Islamic tourism market. Therefore, development of Islamic tourism could play a vital role in the economic growth and prosperity in these countries.

Innovative tourism products: There are opportunities for the OIC countries to bundle traditional pilgrimage and religious travel experiences with the activities related to culture and heritage to make unique and innovative tourism packages. For the destinations with Islamic and heritage sites, there is a growing opportunity to develop and market their potential by designing Muslim-friendly cultural tour packages.

Social media: Internet and social media provide a significant communication platform for introducing, positioning and marketing of the Islamic tourism brands, products and services to a wider audience.

5 Promoting Regional Integration in the OIC Countries through Tourism

This section looks at the role of tourism in promoting regional integration with a special emphasis on the OIC countries. In this context, first some key concepts on regional integration were explained. Second, a discussion on the interlinkages between tourism and regional integration was presented. Finally, six potential areas of cooperation were identified and elaborated in promoting and deepening regional integration through tourism in the OIC countries.

5.1 Key Concepts on Regional Integration

Regional integration is about getting people and goods & services moving freely across the countries within a region. In other words, this means getting goods to move more easily across borders; transport, energy and telecommunications to connect more people across more boundaries; people to move more freely across frontiers, and capital and production to move and grow beyond national limits. It is widely recognized that international trade and tourism activities play a significant role in accelerating economic growth as well as promoting regional integration as cross-border activities.

In order to better understand the concept of regional integration, a review of the two elements i.e. region and integrate is necessary. The term of region is often used to reflect some form of geographic location, area of government/authority, some form economic association, or even in terms of socio-cultural characteristics (Chingono and Nakana, 2009). On the other hand, the integration is an act or process of bringing together the different parts, elements or components through some form of framework, say legal, to fulfil the motives, goals or objective/s (Chingono and Nakana, 2009). Regional integration, also referred to as regionalisation (Warleigh-Lack, 2006), therefore, collectively connects the process of bringing together regions through a given framework to accomplish certain motives, goals or objectives. According to Mattli (1999), the success of regional integration depends on the extent to which economic benefits are derived, enhanced legitimacy of stakeholders, leadership and existence of common formal institutions.

All across the globe, various regional blocks or groups have emerged to advance their common agenda and interests such as in the domains of trade, economy, tourism, transport, development and politics. Some of the examples from various geographic regions could be listed as follows:

Europe: the European Union;

Asia: Asia-Pacific Economic Cooperation (APEC) and Association of Southeast Asian Nations (ASEAN);

Middle East and North Africa (MENA): Arab League and Gulf Cooperation Council (GCC); and

Africa: Common Market for Eastern and Southern Africa (COMESA), East African Community (EAC), Economic Community of Central African States (ECCAS), Economic Community for West African States (ECOWAS), Intergovernmental Authority on Development (IGAD), New Partnership for Africa's Development (NEPAD) and Southern Africa Development Community (SADC).

However, the regional economic blocks/communities often face a number of common challenges including, overlapping memberships by member states, insufficient contribution to implementation of programmes, weak technical capacity, conflicting macroeconomic policies, lack of political will and long-term political commitment (Draper and Qobo, 2007). Thus, regional groups who effectively address such common challenges have become relatively successful in advancing regional integration as well as reaching the goals and objectives set by the regional block/community.

5.2 Role of Tourism in Deepening Regional Integration

Tourism can play an important role in the global fight to reduce poverty and achieve the Sustainable Development Goals. Beyond generating economic benefits and boosting productive capacities, tourism has the potential to foster inclusion by reducing poverty and inequalities among vulnerable groups such as the poor, youth and women. The growth in tourism industry has spurred activities in other sectors of economy such as horticulture, handicrafts, agriculture, construction and even poultry. Intraregional tourism is a precursor to promoting the region for international visitors particularly from the neighbouring countries. It strengthens the capacity within the region to develop better structures and institutions to rectify some of the common challenges faced by a region.

Regional integration can boost intraregional tourism through regional protocols and trade agreements that facilitate the movement of persons through more relaxed visa regimes or enable people to work abroad and set up a business. Similarly, regional bodies may tap the potential of regional tourism when they recognize its potential and plan for it systematically. Regional integration also aims to facilitate the exchange of currencies, and hence lowers transaction costs for tourists. Finally, regional integration can promote tourism in a region by investing in and facilitating transport, particularly air transport (UNCTAD, 2017, p.105).

Not only the potential economic benefits but also the emerging developmental challenges have motivated a number of countries in several regions across the globe to integrate through tourism with a view to enhancing their respective comparative advantages and in so doing advancing their regional competitiveness. The relationship between regional integration and tourism development, could therefore, be regarded as symbiotic, whereby, on the one hand the tourism industry is viewed, particularly by the regional economic groups/blocks, as a vehicle for promoting regional integration. On the other hand, regional integration is also seen as an avenue through which countries can address the various tourism development challenges and maximise opportunities thereof.

Increased intraregional tourism activities could help the development of countries in several ways.² First, there is strong evidence that points to the fact that there is a correlation between tourism flows and regional and international trade (Aradhyula and Tronstad, 2003). Interactions between tourists and the host destination generate a better understanding that leads to increased economic activity usually through trade. Therefore, intraregional tourism promotes regional integration through increased trade and economic activities.

Second, intraregional tourism tends to be more pro-development when compared to international tourism (UNCTAD, 2017). The contribution of the international tourism might be limited in developing economies stemming from the share of tourism income that is not retained in the local economy (i.e. leakage). It is estimated that the average leakage for most developing countries is between 40 and 50 per cent of gross tourism earnings (UNCTAD, 2013). Leakage occurs because of weak linkages and limits multiplier effects, thus reducing the sector's positive economic impact and development potential. Compared with international tourism from outside region, intraregional tourism builds stronger local linkages, making greater use of locally supplied food and building materials and labour. As a result, intraregional tourism is also characterized by higher levels of local spending (Kiambo, 2014). In this context, increased intraregional tourism activities tend to help the development of neighbouring countries through multiplier effects and positive externalities that ultimately stimulates regional integration.

Thirdly, the potential benefits in intraregional tourism motivate countries to work more closely and cooperate on certain areas such as on tourism product development, branding, marketing, human resources development and tourism standards. The increased dialogue and cooperation stemming from tourism also help countries to better understand each other and pave the way to address some

² UNCTAD (2014) listed the nine factors how tourism could stimulate the regional integration (see Box 5.1).

common challenges such as visa restrictions and non-standard practices at customs.

Finally, intraregional tourism has some social benefits that could help deepen regional integration. For example, a greater understanding and valuing of cultures, as well as closer economic ties promote tolerance among nations. This is likely to diminish the potential of conflict and contribute to peace. In this regard, tourism has the potential to contribute to the regional peace and stability through allowing societies and people to know about each other. Another social benefit can be given from the environmental perspective. A study by the United Nations Environment Programme (2011) estimates that tourism generates about 5 per cent of total greenhouse gas emissions worldwide, primarily from tourist transport (75 per cent) and accommodation (21 per cent). Intraregional tourists have a comparatively lower carbon footprint than tourists travelling from outside the region, owing to shorter distances. This may provide a further incentive to promote intraregional tourism that can help countries to achieve sustainable development.

Box 5.1: How Tourism Could Stimulate the Regional Integration?

According to the UNWTO (2014), increased tourism activity in a region could stimulate the regional integration through:

- (a) spreading tourism demand and income all year round and over a region, thus supporting the regional distribution of wealth, reducing pressure on key attractions, and contributing to addressing seasonality;
- (b) creating new and innovative products and add value to existing ones, therefore increasing visitors' satisfaction, length of stay and spending in a region;
- (c) opening new destinations and/or revitalize destinations in decline in a region;
- (d) creating a pulling factor that attracts new market segments, as well as repeat visitors, particularly special-interest segments and individual travellers, which often have higher-yield spending;
- (e) fostering public-private partnerships and stimulating entrepreneurship;
- (f) promoting coordination between local, regional and national authorities;
- (g) protecting and promoting natural and cultural heritage, not only tangible but also intangible heritage, by generating income for preservation and providing economic viability to activities which otherwise may be "lost", particularly those related to more traditional sectors such as agriculture or handicraft;
- (h) generating funding and more attractive conditions for private sector investment; and
- (i) developing cultural understanding and strengthening the cultural links between people at the local, regional, national or/and international levels.

5.3 Potential Areas of Cooperation in Promoting Regional Integration in the OIC Countries through Tourism

One of the effective ways of improving intra-OIC cooperation is the promotion of regional integration in the OIC countries through tourism. The remainder of this sub-section discusses the role of tourism sector and tourism activities in deepening regional integration in the OIC countries. In this context, the following potential areas of cooperation are identified and elaborated: visa facilitation among the OIC countries, designing and promoting regional tourism activities, improving regional transport networks, holding tourism fairs, festivals and exhibitions, devising joint tourism policies at the regional level, and ensuring currency convertibility.

5.3.1 Visa Facilitation among the OIC Countries

The free movement of persons is important for two reasons. First, it deals with the ability of tourists to enter their destination, and second, it enables people seeking employment in the tourism sector to work and investors to establish themselves at the tourist destination. UNWTO and WTTC (2012) found that facilitative visa policy changes helped increase tourist arrivals from the affected markets in a range of 5 to 25 per cent per year on average over a three-year period. Restrictive visa policies discourage potential tourists to visit countries in their respective regions and therefore slow down the regional integration process. In order to boost intraregional tourism, several regional economic communities offer or are in the process of creating a universal tourist visa, a visa that is valid in all member countries that join the scheme. The most well-known example is the Schengen visa system seen in the EU countries. In the EAC, Kenya, Rwanda and Uganda launched an East African tourist visa, and it is expected that the other members will follow suit. In SADC, Botswana (park visits), Zambia and Zimbabwe have adopted the Kavango-Zambezi Transfrontier Conservation Area (KAZA) Univisa. ECOWAS is in the process of implementing a joint visa for non-citizens of the Community (Eco-visa). By taking the stock of such regional examples, the OIC countries in various geographical regions can develop eased visa regimes to promote intraregional tourism and enhance regional integration. In fact, within the OIC group, the GCC group constitutes a good example in terms of visa arrangement that it has among its member countries.

5.3.2 Designing and Promoting Regional Tourism Activities

It is essential to develop regional tourism brands in order to promote regional tourism. In this regard, joint regional tour packages and touristic routes covering a set of neighbouring OIC countries can be designed. In fact, there is a good example

of such an initiative from a group of OIC countries in West Africa, which is called “Regional Project on Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa” (Box 5.2).

Box 5.2: Regional Project on Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa

The project for sustainable tourism in West Africa was initiated at the 4th Islamic Conference of Tourism Ministers (ICTM) and at the 16th session of the UNWTO General Assembly, both held in Dakar, Senegal, in March and December 2005, respectively. The study process started in 2008 in the framework of a call for tenders, saw its phases 1 and 2 confirmed at the 18th session of the General Assembly of the World Tourism Organization held in Astana, Kazakhstan in October 2009. The following ten OIC countries involved in the project: Benin, Burkina Faso, Gambia, Guinea, Guinea Bissau, Mali, Mauritania, Niger, Senegal, and Sierra Leone. The following objectives were identified at the beginning of the project:

- To reduce poverty among local communities through augmentation of income, an increase in the number of jobs and the promotion of income generating activities;
- To ensure the conservation of biological diversity at the sub-regional level;
- To create a network of national and regional parks and cross-border protected areas;
- To professionalize the actors of the tourism sector of the sub-region;
- To promote sustainable tourism and ecotourism; and
- To support the process of sub-regional economic integration based on rational management of cross-border protected areas.

The project benefits from the technical assistance of the World Tourism Organization, the Organization of the Islamic Cooperation, financial support from the Korea International Cooperation Agency (KOICA) and the ST-EP Foundation. The validation of all the options adopted in the final document of the study was formally done at the meeting of the steering committee in Madrid in December 2009. Most recently, the 13th Steering Committee Meeting of the “Regional Project on Sustainable Tourism Development on a Network of Cross-border Parks and Protected Areas in West Africa” was held in Casablanca, Kingdom of Morocco, on 15-17 February 2016. The Meeting was attended by delegates of members of the Committee and representatives of the ICDT and IDB Group. The meeting adopted a set of activities and urged participating Member States to submit their national projects in bankable format for further necessary action.

In particular, national parks and protected areas are important for the development of some sub-segments of the tourism sector such as eco-tourism and safari tourism. However, these areas usually spread over some neighbouring

countries. In this context, tourists who are willing to visit and explore the whole park/protected area have to pass from one country to another. Cross-border movement in parks/protected areas are not as easy as in the international airports that require such as obtaining the visa, going to the check-point, and waiting for officials to complete formalities. Even in some cases tourists cannot obtain the visa at the check-point that they have to return back. Such difficulties do not help development of regional tourism or integration. Therefore, OIC countries in the same region can join their forces in order to prepare and offer tour packages for tourists who would like to explore national parks and protected areas.

On the other hand, the UNWTO has also put a special emphasis on developing new tourism routes to promote regional integration. According to the UNWTO, while promoting regional integration through tourism, development of new tourism routes or re-inventing the existing traditional regional routes could play a significant role as they³:

- a) create networks within a region or linking various regions and/or countries thus maximizing the potential of cooperation as opposed to competition between various players in a region or various regions;
- b) create opportunities to generate jobs and business opportunities in less favoured regions and thus their socioeconomic regeneration and development;
- c) fight rural desertification and migration to urban areas by creating job and business opportunities notably for youth; and
- d) strengthen economic linkages, social cohesion and cultural understanding.

A well-known concrete initiative of the UNWTO in the domain of new tourism routes and regional integration is called “Silk Road Programme”. So far, the number of participating countries in the programme reached 33 by 2017 where 16 of them are members of the OIC (Box 5.3).

³ The 98th session of the UNWTO Executive Council meeting in Spain highlighted the role of tourism routes in promoting regional integration and development. The Council further debated key factors to stimulate tourism growth such as visa facilitation and air connectivity while recalling the role the tourism sector can play in the sustainable development agenda (Santiago de Compostela, Spain, 5-6 June 2014).

Box 5.3: UNWTO Silk Road Programme

UNWTO's role in promoting the growth of Silk Road tourism dates back to 1994, when 19 countries called for the peaceful and fruitful re-birth of these legendary routes as one of the world's richest cultural tourism destinations. It was in 2010 that UNWTO developed a specialised programme dedicated to advancing tourism along the Silk Road. The first Silk Road Action Plan 2010/2011 was launched at the 5th International Meeting on the Silk Road in Samarkand, Uzbekistan, where the three key focus areas were established as:

- a) Marketing and promotion;
- b) Capacity building and destination management; and
- c) Travel facilitation.

By 2017 the number of participating countries to the UNWTO Silk Road Programme reached 33 and include: Albania, Armenia, Azerbaijan, Bangladesh, Bulgaria, China, Croatia, DPR Korea, Rep. Korea, Egypt, Georgia, Greece, Iran, Iraq, Israel, Italy, Indonesia, Japan, Kazakhstan, Kyrgyzstan, Mongolia, Pakistan, Romania, Russian Federation, Saudi Arabia, San Marino, Spain, Syria, Tajikistan, Turkey, Turkmenistan, Ukraine and Uzbekistan. In 2016, the UNWTO published a comprehensive action plan "The Silk Road Action Plan 2016/2017" that overviews UNWTO's strategies and initiatives designed to help Silk Road tourism grow more robust, competitive and sustainable. The Action Plan aims to foster collaboration between stakeholders to stimulate investment and poverty reduction along the Silk Road, while safeguarding its cultural and environmental resources.

5.3.3 Improving Regional Transport Networks

In 2015, more than half (54 per cent) of all overnight visitors worldwide reached their destination by air, and the trend points to a gradual increase in the share of air transport (UNWTO, 2016). Despite this relevance, air connectivity is one of the major constraints to the growth of tourism in many developing countries due to cost ineffectiveness, diseconomies of scale, poor infrastructure, and safety and security concerns. Air services between countries often have been predominantly regulated on the basis of restrictive bilateral agreements. However, regional agreements to opening up the skies would be helpful to improve air connectivity among neighbouring countries in a region through reducing travel costs, increasing frequency of flights and starting up new flight routes. Also other means of transport road, rail and maritime lines are important for the development of intraregional tourism. As many OIC countries suffer from limited financial sources for the improvement of transport networks, joint infrastructure projects for facilitation of tourism (e.g. cross-border railway projects, regional hub-airports) would play a key

role to unleash the potential of intraregional tourism. The Dakar-Port Sudan railway corridor project is an important initiative of the OIC that has the potential to scale up regional tourism and intensify regional integration among member countries located in West and East Africa (Box 5.4).

Box 5.4: OIC Dakar-Port Sudan Railway Corridor Project

The realization of a Dakar-Port Sudan Railway connection is a project supported by the OIC, with the aim of providing an important transportation link between the OIC Sub-Saharan countries, crossing the whole of Africa from West to East, with the aim of fostering multilateral economic development and expanding global prosperity. The project was launched by Sudan in 2005, presenting it to that year's OIC summit. Subsequently, at the 11th session of the Islamic Summit Conference, held on 13-14 March, 2008 in Dakar, Senegal, the resolution was taken from the promotion of the new Dakar-Port Sudan railway infrastructures, crossing the territories of Senegal, Mali, Burkina Faso, Niger, Nigeria, Chad and Sudan. The Summit also decided to include the Republic of Djibouti in the Feasibility Study of this project. The following 35th Session of the Council of Foreign Ministers held in Kampala, Uganda on 18-20 June, 2008, decided to extend the links to the Republic of Guinea, Cameroon, Uganda and Gambia, thus creating a real transportation corridor that, besides providing the uninterrupted connection between the Atlantic and the Red Sea (and thereafter the Indian Ocean) would increase traffic facilities through the main ports of the Gulf of Guinea, such as Lagos, Conakry and Yaoundé.

5.3.4 Holding Tourism Fairs, Festivals and Exhibitions

Tourism fairs and exhibitions create opportunities to showcase products of local/regional producers. Moreover, such regional fairs and exhibitions provide an enabling environment for towns/cities and regions to promote and market their touristic attraction and heritage sites that would lead to increased tourism activity within the region. A festival is an event ordinarily celebrated by a community on some characteristic aspect of that community such religion and traditions. In this regard, festivals provide chances for people living in neighbouring cities or regions to know more about each other, and therefore have the potential to enhance regional tourism. Given the rich history and culture of the OIC countries, regional festivals could be used as an important instrument to promote regional tourism and integration activities.

5.3.5 Devising Joint Tourism Policies at the Regional Level

A comprehensive regional tourism policy is needed to provide a conducive environment for regional tourism development. Ghimire (2001) argues that regional tourism cannot flourish and contribute to economic diversification and structural transformation if it is not integrated in regional planning processes.

Tourism products and strategies have traditionally targeted international tourists with a little emphasis on intraregional tourism. It is therefore not surprising that very few national development plans refer to intraregional or regional tourism.

An example can be given from the Southern African Development Community (SADC) where a five-year tourism strategy was drawn up for the period 1995–1999; in 1996, the Regional Tourism Organization of Southern Africa was established to coordinate and implement the strategy. In 1998, the Community adopted the Protocol on the Development of Tourism in the Southern Africa Development Community. Tourism was then included in the Protocol on Trade in Services of SADC adopted in 2012 as one of six key sectors. In its Regional Infrastructure Development Master Plan (2012), tourism is featured as a separate sector, with a focus on transfrontier conservation areas.

Another example can be given from the ASEAN group. In January 2009, in Hanoi, Vietnam, the heads of the ASEAN Tourism Association (ASEANTA) and the ASEAN Competitiveness Enhancement (ACE) Project signed a memorandum of understanding under which the parties agreed that there is a need “to develop a new, more effective marketing strategy which promotes Southeast Asia as a single destination.” In June 2009, the blueprint document was published “Marketing the Southeast Asia Destination Brand: A New Tourism Marketing Strategy and Plan for the ASEAN Region”. It shows how the collective resources of the ASEAN destinations can be leveraged to attract significantly more high-yield travellers on multi-destination trips to Southeast Asia. Importantly, it offers a strategy that adds value to the efforts of individual national tourism organisations (NTOs) and an operating model that is sustainable in the long term.

5.3.6 Ensuring Currency Convertibility

Several regional economic communities strive to deepen their integration through monetary unions, which implies that the currencies of fellow member countries would be characterized by fixed exchange rates and convertibility. Currency restrictions may be introduced to prevent capital flight or to support exchange rates. Currency restrictions are more common when there is a likelihood of political instability and violence (UNCTAD, 2017).

Currency convertibility is important both for regional and international tourism. It may be argued that in the absence of currency convertibility, the burden of exchanging one currency for another is a transaction cost for tourists similar to that of dealing with visa requirements. The lack of currency convertibility or prevailing currency restrictions may also have a negative impact on the financing of tourism development that many international investors face higher costs because of currency restrictions (Nkuepo, 2012). UNCTAD (2017) findings show that in the average African economy over the period 2005–2015, the introduction of currency

restrictions was associated with 10 per cent lower growth in international tourism receipts. In other words, ensuring currency convertibility and policies towards this direction would allow regions to attract more tourists and therefore would stimulate regional integration. In this context, OIC countries with restrictions on currency convertibility need to work on to eliminate them or develop alternative solutions with a view to improving regional tourism and integration in their respective regions.

6 Concluding Remarks and Policy Implications

As a group, the OIC member countries have a high potential for the development of a sustainable international tourism sector. This is true given their rich and diverse natural, geographical, historical, and cultural heritage assets. Therefore, international tourism is a very important sector that could, if properly planned and managed, play a significant role in the economic development of the OIC countries. This is due not only to their existing and potential tourism resources, but also to the fact that their citizens travel in large numbers around the world for business, leisure, and other purposes. However, considering their modest share in the world tourism market and the concentration of tourism activity in a few of them, it seems that the desirable levels of tourism development and cooperation in many OIC countries, and in the OIC region as a whole, have not yet been achieved. The development level of the tourism sector in OIC countries, on average, continues to stay under its potential compared to the world averages whether it is measured in terms of the contribution of the tourism sector into employment or GDP. Therefore, albeit a crucial factor, the inherent natural tourism resources in the OIC countries cannot, per se, make a successful tourism industry unless properly planned and managed.

In fact, the challenges facing tourism and the development of a sustainable international tourism sector in the OIC countries are diverse as each country has its own tourism features, level of development, and national development priorities and policies. In the case of many OIC countries, these challenges still include the lack of technical know-how and the weak promotional activity. Despite the fundamental awareness and basic cognisance 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 generally a lack of tourism knowledge and professionals. This is often accompanied by the absence or weak publicity promotion and mass media exposure due, in many cases, to the limited communication systems and technological services. Many OIC countries also lack the sufficient infrastructures necessary for the development of a sustainable tourism industry. Primary amongst these are hotels and lodging services, transportation and communication, and tourism information services. This makes it difficult to provide tourists with the international standards of tourism facilities and services.

The issue of tourism investments is also an important one. While investment in services is a well-established economic activity in the developed countries, it is still

lagging behind in many developing countries. Investment in service-oriented projects, particularly in tourism, is often regarded in most developing countries as a high-risk task. Accordingly, though they may have a natural tourism potential, it is still very difficult for some poor and least-developed OIC countries to gain access to reasonable financing for their tourism projects even when they manage to tackle the problems of project identification and planning. On the other hand, the issue of developing consistent tourism strategies and policies is one of the challenges facing many OIC countries, which are still experiencing difficulties in reaching integrated tourism policy-making due, in general, to policy conflicts between the government departments and the tourism private agencies. This issue is usually coupled, in many cases, with the lack of effective administration, regulation and institutional frameworks of the tourism activity.

Another challenge is the lack of tourism diversification. Modern international tourism activity has shown a growing tendency towards diversification and change. This makes it difficult for many OIC countries, including those with a relatively developed tourism sector, to keep pace with the rapidly changing and complex requirements of international tourists. In a highly competitive international tourism market, and considering the emergence of new tourism destinations, improving the conditions that foster modern tourism development is not an easy process. Last, but not least, there are concerns on the tourism safety in some OIC countries. In this context, it is worth mentioning that the safety of tourists is a primary factor for any successful tourism destination and should, therefore, be one of the basic objectives of tourism planning and management. Safety-related tourism problems, whether real or perceived, exert a negative impact on the reputation of the host countries. In this regard, negative perceptions and political instability appear to play a detrimental role in the prospects of tourism in many OIC countries.

However, despite all these challenges and the modest share of the OIC countries in the world tourism market, there is still a wide scope for the development of a sustainable international tourism industry in those countries. For example, Islamic tourism has a great potential for the development of tourism sector in the OIC countries. There is an increasing level of awareness about the social, economic and cultural potentials of the Islamic tourism at the top policy makers' level. Development of Islamic tourism has also gained greater importance in the agenda of the OIC in recent years such as the First OIC International Forum on Islamic Tourism was organized in Jakarta, Indonesia on 2-3 June 2014.

Another promising factor that can help development of the tourism sector is the intraregional tourism. As intra-OIC tourism figures presented in section 3 of the Report indicate, there is a positive yet slow progress in the level of cooperation among OIC countries in this domain. However, there is still unleashed potential that can be activated through policy actions and interventions. In particular, such policy actions and interventions would allow the OIC countries to reap several socio-economic opportunities entrenched in intraregional tourism.

Overall, the development of a sustainable international tourism industry necessitates the adoption of articulate long-term strategies as well as medium to short-term coherent plans and programmes at the national level that would be accompanied by a process of creating a supportive OIC cooperation environment at the regional level. In this context, the following set of policy implications can be proposed at both the national and the OIC cooperation level to serve as policy guidelines to which the attention of the member countries needs to be drawn.

At the National Level

Devise sustainable tourism development projects: The preparation and promotion of sustainable tourism development should be an integral part of the national development plans and strategies. The objectives and programmes of action for tourism development should be focused on the promotion of the economic, social, cultural, and environmental incentives of tourism. Sustainable tourism development strategies should be outlined specifically and formulated in consultation with the private sector and other relevant stakeholders in the tourism sector. Tourism development projects and strategies should consider and include issues of environmental sustainability and poverty alleviation. Governments and the private sector must place increased importance on these issues.

Invest in basic tourism-related infrastructure: The quality and efficiency of the basic tourism-related infrastructure and services such as hotels, roads, public amenities, transportation and communication, tourism information, and visa regulations should be improved based on international standards to provide world-class services to visitors and tourists.

Improve safety in the tourism sector: Efforts should be made to create an environment that ensures safe travel of tourists by providing well-established border security measures, particularly at airports. Also tourism police services can be utilised to improve safety in tourist attraction sites in the OIC countries.

Review border and customs rules and regulations: International tourists would like to have a pleasant and smooth experience during their visits especially at border and customs check-points. In this context, the OIC countries are recommended to review their existing rules and regulations to eliminate

unnecessary steps and simplify procedures being implemented at border and customs check-points for international tourists without compromising the national security. Some OIC countries have already started implementation of e-visa schemes and automated passport control gates to improve the experience of international visitors.

Strengthen public-private sector cooperation: Tourism is a business and primarily an area for private sector activity. Thus, efforts should be made to encourage and promote extensive private sector involvement in tourism development through strengthening public-private sector cooperation with a view to establishing policies, strategies, and regulations relative to sustainable tourism development.

Diversify tourism products and services: Given the increasing competition among destinations, new and diverse tourism products and services should be developed and marketed by taking local values into account and involving local communities. For instance, efforts should be made to improve the potential of ecotourism, not only as a sector with great potential for economic development, especially in remote areas where few other possibilities exist, but also as a significant tool for the conservation of the natural environment.

Raise awareness: In order to help change people's perceptions regarding tourism and raise their awareness of the opportunities and challenges involved therein, tourism-oriented education should be promoted and developed. This should be accompanied by making efficient use of the mass media and other promotional facilities to publicise and promote existing attractions and available tourism resources. In this context, training programmes on different aspects of tourism should be provided by national tourism authorities, particularly to people and personnel directly engaged in tourism activities. These programmes should cover a broad range of subjects such as foreign languages, business and e-tourism techniques, the environmental and socio-cultural impacts of tourism, history, national flora and fauna, etc. To facilitate those programmes, actions must be taken to provide local communities with financial and technical support and develop entrepreneurial capacities and managerial skills, especially in small and medium-sized tourism enterprises (SMEs), in order to improve the competitiveness of tourism products and services.

At the OIC Cooperation Level

Organize joint promotion programmes and campaigns: Joint programmes and promotional materials on tourism in the OIC member countries, such as TV programmes, brochures, posters, and guidebooks should be developed and made available to the member countries as well as to other countries around the world in order to promote the cultural heritage, diversity, and landmarks of the OIC countries at the regional and international levels. In this context, scientific methods of joint tourism marketing and advertisement should be developed and supported by tools that have a major impact on consumers such as the Internet. A proposed example on these tools could be an OIC Internet Guide for Tourism with a view to providing all actors in the tourism sector with comprehensive and updated information on tourism opportunities in the OIC member countries to help increase intra-OIC tourism activities. In so doing, the experience of the EU Internet Guide “EU Support for Tourism Enterprises and Tourist Destinations” could be a useful example. In this context, the on-going process on the establishment of an ‘OIC Online Tourism Portal’ by the relevant OIC institutions needs to be accelerated with a view to completing the establishment process and activating the Portal as soon as possible.

Form alliances among stakeholders in the tourism sector: The establishment of alliances among tourism stakeholders in the OIC countries would play a key role in the development of the tourism sector. In particular, official tourism promotion bodies of the OIC countries should be encouraged to cooperate with a view to strengthening tourism marketing and promotion both at the sub-regional level as well as at the level of the OIC region as a whole.

Organize capacity building and training programmes at the OIC level: Joint capacity building and training programmes on various aspects of the tourism sector should be developed and organised by the relevant training institutions in the OIC countries. This also requires establishment of linkages or networks among tourism training institutions in the member countries to facilitate the exchange of experts and research on tourism development.

Box 6.1: Training Program on the Development and Promotion of Muslim Friendly Tourism (MFT) in COMCEC Member Countries

SESRIC organised a training program on the “Development and Promotion of Muslim Friendly Tourism in COMCEC Member Countries” for 15 member countries with little or no Muslim Friendly Tourism (MFT) applications and/or have weak implementations about the potential and positive impact of MFT on 4-7 July 2017 in Ankara, Turkey.

Funded by the COMCEC PCM Program and implemented by SESRIC, the training program was geared towards facilitating the transfer of knowledge on development and promotion of MFT in OIC Member Countries by sharing the Malaysian, Turkish and other selected OIC countries’ experiences in developing successful MFT policies, regulations, standards and marketing strategies.

Throughout the program the trainers from the Islamic Tourism Centre of Malaysia gave insightful and interactive lectures and presentations on MFT. As part of the program, a whole day was dedicated to a site visit to Kizilcahamam for participants to have firsthand view of Islamic tourism being practiced. During the final day of the program, participating countries found a chance to share their national experiences in developing and implementing Muslim Friendly Tourism initiatives and policies. At the end of the program, all participants were awarded their certificates of participation.

Harmonize Halal standards and develop guidelines: The lack of harmonized Halal standards not only constitutes a challenge for investors in the Islamic tourism sector but also for Muslim travellers. In this regard, there is a need for working out modalities and findings ways and means to harmonize the Halal standards used in the Islamic tourism sector with the involvement of the OIC countries and the relevant stakeholders. It is also essential to develop some standardized guidelines in order to promote development of Islamic tourism and deepen cooperation among the OIC countries.

Make efforts to improve the image of the OIC countries: Peace and security are two important elements for tourism development. Due to political instability and on-going conflicts in some OIC countries, there is an overall negative global media positioning of these countries. Furthermore, the phenomenon of Islamophobia is also on the rise across the globe. There is a need for joint action and cooperation at the OIC level to counter the negative media publicity and address the growing Islamophobia by highlighting the cultural and religious values and contributions of the Muslims to the history, culture, architecture and art. This will help not only in positive image building and but also pave the way for the development of Islamic tourism.

Design long-term strategies and master plans for the development of Islamic tourism market: Being the major source markets and beneficiaries of Islamic tourism, the OIC countries, as a group, should develop a joint, comprehensive, and evidence based long-term strategy for the development of a sustainable Islamic tourism sector at the OIC level.

Ease visa policies and develop regional solutions: Existing visa policies and regimes in the OIC countries need to be reviewed with a view to easing movement of people. Visa facilitation may not only lead to increased number of intraregional tourism but also make countries/regions more attractive on the eyes of potential investors. Also development of common visa schemes for a group of OIC countries located in the same region may enhance the development of intraregional tourism as well as deepen regional integration. In this connection, efforts should be made to establish a legal framework towards concluding an agreement on visa arrangements among the OIC countries, including the possibility of issuing an electronic or joint visa.

Organize regional tourism activities/routes: The OIC countries have several natural parks, heritage sites and protected areas. However, some of these areas start within the boundaries of one country but ends in another one. Therefore, to unleash the potential of such areas, the OIC countries need to develop joint tourism activities or routes with a view to branding and marketing these areas. In fact, such joint efforts would also help improve policy dialogue and cooperation among OIC countries as well as lead them to benefit from existing national experiences and best practices like in the case of “Regional Project on Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa”.

Improve regional transport networks: Existing transport networks among the OIC countries are not strong enough to meet the growing demand stemming from Muslims living in different countries and continents. Even at the OIC sub-regional level, there are critical shortage of roads, airports and railways. People living in a certain OIC country sometimes need to first go to another third country in order to visit its neighbouring country due to lack of a direct connecting route/link. In this context, policies aiming at improving transport networks are vital for the development of intra-OIC tourism that would pave the way for increased regional integration. Linkages in air, land, rail, and sea transportation should be facilitated and improved in order to ease access from one destination to another within the OIC region. To start with, some efforts could be made to establish an OIC alliance among the airline companies of the OIC countries with the aim of having direct flights between their capitals and major cities.

Organize tourism fairs, festivals and exhibitions: Majority of people living in the OIC countries are not fully aware of beauties and touristic attraction places/products that are available in their regions as well as in neighbouring countries. In this regard, activities such as fairs, festivals and exhibitions are important to raise awareness among potential tourists and investors as well as instrumental for branding and marketing regions. In the domain of tourism fairs and exhibitions, a subsidiary organ of the OIC, ICDT is very active and regularly organizes tourism fairs and exhibitions in various regions of the OIC. In this context, OIC countries need to be encouraged to actively participate to the fairs and exhibitions organized by the ICDT.⁴ It is also important organize such activities in all geographical regions of the OIC group in order to enable all regions benefiting from such arrangements. There is also a need for dedicated events (fairs, festivals, exhibitions, and forums) to introduce and advertise the Islamic tourism products and services of the OIC countries.

Ensure currency convertibility: The lack of full currency convertibility in a certain touristic destination brings additional cost of transaction. Some tourists also eliminate such countries in their list of destinations to visit on the grounds that currency restrictions may associate with other restrictions in the country. According to UNWTO (2017), both regional and international tourism are negatively affected from restrictions on currency convertibility. In this regard, the OIC countries with such restrictions need to work on how to gradually ensure full currency convertibility especially for regional and international visitors by taking other economic impacts of restrictions into account.

Devise joint regional tourism policies: Effective regional tourism policies are essential to overcome some challenges seen at the national policy-level and to eliminate bottlenecks that hinder the development of regional tourism. Regional tourism policies play a key role to brand and market countries in the region as a single destination. Therefore, the OIC countries need to pay more attention to regional tourism policies and develop mechanisms (e.g. working groups, committees, strategic plans etc.) for improved destination marketing and enhanced regional tourism.

Develop a blueprint document that includes a SWOT analysis and action plan for sub-regions of the OIC: As other regional blocks or communities developed blueprint documents such as the Association of Southeast Asian Nations (ASEAN) and Southern African Development Community (SADC), it is recommended to prepare a blueprint document that includes a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis of the OIC sub-regions and action plan for

⁴ 3rd Tourism Fair of the OIC Member States takes place in Cairo, Arab Republic of Egypt on 18-21 October 2017.

development of regional tourism in the OIC countries. Such a blueprint document may focus on three major areas such as travel facilitation, destination management and capacity building; and marketing and promotion.

Identify key stakeholders and cooperate with regional and international organisations: In order to improve tourism activities and deepen cooperation, the OIC countries should identify key stakeholders and review experiences of existing regional economic blocks, regional and international organisations. This would allow the OIC countries to prevent repeating same mistakes on developing regional tourism policies and reduce required time and cost in designing such policies that are instrumental for deepening regional integration.

Ensure political willingness and commitment: Several initiatives of various regional blocks or communities all across the globe could not reach their goals and targets due to weak political willingness and long-term commitment. Therefore, the OIC countries need to pay utmost attention to ensure highest level of political commitment for the success of tourism development policies and initiatives made at the OIC level. If this is ensured, it is likely to witness increased intra-OIC tourism figures and improved cooperation among the OIC countries over time.

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Statistical Appendix

Table A.1 International Tourist Arrivals by Region (Millions)

Year	World	Africa	Americas	Asia & Pacific	Europe	Middle East
1975	222.3	4.7	50	10.2	153.9	3.5
1980	277.6	7.2	62.3	23	178	7.1
1981	278.2	8.1	62.5	24.9	175.1	7.6
1982	276.4	7.6	59.7	26	174.9	8.3
1983	281.2	8.2	59.9	26.6	179	7.5
1984	306.2	8.8	67.4	29.5	192.8	7.7
1985	319.5	9.6	65.1	32.9	203.8	8.1
1986	329.5	9.3	70.9	36.8	205.5	6.9
1987	359	9.8	76.6	42.1	223.3	7.2
1988	384.1	12.6	83	48.7	230.7	9.1
1989	409	13.8	86.9	49.4	249.6	9.2
1990	438.4	15.2	92.8	56.2	264.7	9.6
1991	441.3	16.3	95.3	58	262.8	8.9
1992	478.4	18.2	102.2	65.8	280.9	11.3
1993	494.2	18.8	102.2	72.3	289.5	11.4
1994	518	19.1	105.1	80.1	301.5	12.1
1995	538.5	20.1	109	82.5	313.2	13.7
1996	572.4	21.8	114.5	90.4	329.9	15.8
1997	596	22.8	116.2	89.7	350.6	16.7
1998	614.3	25.2	119.2	89.4	362.5	18
1999	637.4	26.7	122	98.8	368.4	21.5
2000	674	26.2	128.2	110.3	386.4	22.4
2001	680	28.9	122.1	120.7	383.8	25
2002	700	29.5	116.6	131.1	394	29.2
2003	694	31	113.1	113.3	407.1	29.5
2004	764	33.8	125.7	144.2	424.4	36.3
2005	809	34.8	133.3	154	453	33.7
2006	846	39.1	135.8	166	463.9	40.9
2007	900	42.6	142.9	182	485.4	46.9
2008	919	44.5	146.9	184	487.3	56
2009	880	45.9	140	180.9	460	52.9
2010	953	49.5	150.1	205.4	488.9	54.7
2011	998	49.5	155.5	218.7	520.1	50.3
2012	1045	51.9	162.6	237.8	540.1	51.8
2013	1093	54.7	167.6	254.1	565.7	51
2014	1137	55	181.9	269.5	575.2	55.4
2015	1189	53.4	192.7	284.1	602.6	55.9
2016	1235	57.8	199.9	308.7	615.2	53.6

Source: UNDATA Online Database and UNWTO World Tourism Barometer (various issues)

Year	World	Africa	Americas	Asia & Pacific	Europe	Middle East
1975	40.7	1.3	10.2	2.5	25.9	0.9
1980	104.5	3.4	24.7	10.3	62.7	3.5
1981	106	3.7	27.8	12.1	58.1	4.4
1982	99.9	3.4	25.7	12.2	56.4	2.2
1983	103	3.5	26.3	12.8	56	4.4
1984	111.7	3.2	32	13.7	58.1	4.7
1985	118.5	3.1	33.3	14.5	63.4	4.2
1986	144.4	3.6	38.4	18.8	80.1	3.5
1987	178.1	4.6	43.1	24.8	101.1	4.5
1988	205.9	5.5	51.3	32.4	112.3	174.2
1989	262.9	5.7	60.2	36.1	155.8	5.2
1990	264.1	6.4	69.2	41.1	143.1	4.3
1991	277.7	6	76.3	42.9	148.1	4.5
1992	320.7	6.8	3.7	51	172.7	6.6
1993	327.3	6.9	89.41	57	167.3	6.9
1994	356.4	7.6	92.4	67.3	181.1	8.1
1995	405	8.5	98.4	75.9	212.3	9.8
1996	438.6	9.7	108.2	84.8	224.8	11
1997	442	9.5	114.4	82.2	223.7	12.1
1998	444.2	10.2	115.2	72.1	234.8	11.9
1999	457.4	10.8	119.9	79	233.9	13.9
2000	477	10.4	130.8	85.2	232.7	15.2
2001	464	11.5	119.8	88	227.7	15.6
2002	480	11.9	113.4	96.3	242.5	16.2
2003	524	16	114.1	93.5	284.1	19.7
2004	633	18.9	132	123.9	329.3	25.2
2005	676	21.6	144.5	134.5	349.2	26.3
2006	742	24.6	153.7	156	376.3	30.6
2007	858	29.1	171.3	186.8	435.2	35
2008	942	29.9	187.7	209	472.8	42.8
2009	852	28.1	165.6	202.8	412.4	43.3
2010	961	31.6	182.2	248.7	406.2	50.3
2011	1073	32.7	197.9	298.6	466.7	46.4
2012	1110	34	213	324	458	47
2013	1197	35.1	264.4	360.7	491.7	45.1
2014	1252	36.1	288	420.1	513.5	51.6
2015	1196	32.8	305.6	349.5	449.8	58.2
2016	1220	34.8	313.1	366.7	447.4	57.6

Source: UNDATA Online Database and UNWTO World Tourism Barometer (various issues)

	2010	2011	2012	2013	2014	2015
Afghanistan						
Albania	2417	2932	3514	3256	3673	4131
Algeria	2070	2395	2634	2733	2301	1710
Azerbaijan	1963	2239	2484	2509	2298	2006
Bahrain	11952	6732	8062	9163	10452	11621
Bangladesh	303	155	125	148	125	
Benin	199	209	220	231	242	255
Brunei	214	242	209	225	201	218
Burkina Faso	274	238	237	218	191	163
Cameroon	573	604	817	783	822	
Chad	71	77	86	100	122	120
Comoros	15.3	18.8	22.8	21.9	22.8	23.6
Cote d'Ivoire	252	270	289	380	471	1441
Djibouti	51	56	60	63		
Egypt	14051	9497	11196	9174	9628.3	9139
Gabon						
Gambia	91	106	157	171	156	135
Guinea	12.4	131	96	56	33	35
Guinea-Bissau	22.3	36.7	35.4	35.5	36.1	43.8
Guyana	152	157	177	158	206	207
Indonesia	7003	7650	8044	8802	9435	10407
Iran	2938	3354	3834	4769	4967	5237
Iraq	1518	1510	1111	892		
Jordan	4207	3960	4162	3945	3990	3761
Kazakhstan	2991	4093	4437	4926	4560	
Kuwait	5208	5574	5729	6217	6528	6941
Kyrgyzstan	855	2278	2406	3076	2849	3051
Lebanon	2168	1655	1366	1274	1355	1518
Libya						
Malaysia	24577	24714	25033	25715	27437	25721
Maldives	792	931	958	1125	1205	1234
Mali	169	160	134	142	168	159
Mauritania						
Morocco	9288	9342	9375	10046	10283	10177
Mozambique	1718	1902	2113	1886	1661	1552
Niger	74	82	94	123	135	135
Nigeria	6113	3765	4673	4038	4803	6017
Oman	1441	1018	1241	1392	1611	1897
Pakistan	907	1161	966			
Palestine	522	449	490	545	556	432
Qatar	1700	2057	2346	2611	2826	2930
Saudi Arabia	10850	14179	16332	15772	18260	17994
Senegal	900	968	962	1063	963	1006.6
Sierra Leone	39	52	60	81	44	24
Somalia						
Sudan	495	536	575	591	684	741
Suriname	206	221	240	250	253	229
Syria	8546	5070				
Tajikistan	160	183	244	208	213	414
Togo	202	300	235	327	282	273
Tunisia	7828	5746	6999	7352	7163	5359
Turkey	31364	34654	35698	37795	39811	39478
Turkmenistan						
Uganda	946	1151	1197	1206	1266	1303
United Arab Emirates						
Uzbekistan	975			1969		
Yemen	1025	829	874	990	1017.5	366.7
OIC Total	167720	160622	162525	172958	179430	173358

Source: UNDATA Online Database, UNWTO Compendium of Tourism Statistics CD-ROM 2017

Note: To make a reliable comparative analysis, countries with missing data are eliminated while calculating the OIC total

	2010	2011	2012	2013	2014	2015
Afghanistan	169	152	177	191	92	92
Albania	1780	1833	1623	1670	1849	1614
Algeria	324	300	295	326	348	357
Azerbaijan	792	1500	2634	2618	2713	2535
Bahrain	2163	1766	1742	1865	1915	
Bangladesh	104	97	105	131	154	148.4
Benin	149.4	201	174	193	153	160
Brunei			92	96	79	140
Burkina Faso	105	116	128	200	183	
Cameroon	171	423	377	607		
Chad						
Comoros	35.2	42.2	39.3			
Cote d'Ivoire	213	186	172.5	191	184	
Djibouti	18	19.2	20.5	21.6	24.7	30.9
Egypt	13633	9333	10823	6747	7979	6897
Gabon						
Gambia	80	109	127	103	127	138
Guinea	2.04	2.12	1.68			
Guinea-Bissau	13.6	14.5	6.9	17.4		
Guyana	80	95	64	77	79	65
Indonesia	7618	9038	9463	10302	11567	12054
Iran	2631	2489	2483	3212	3676	
Iraq	1736	1557	1640			
Jordan	4390	4351	5123	5145	5518	4997
Kazakhstan	1236	1524	1572	1779	1701	1825
Kuwait	574	644	780	619	615	931
Kyrgyzstan	212	405	486	585	468	481
Lebanon	8026	6797	7361	7032	6835	7087
Libya	170	30	110	131		
Malaysia	18152	19649	20251	21500	22600	17614
Maldives	1713	1966	2032	2422	2811	2664
Mali	208	218	144	178.2	214	
Mauritania			50	50	42	31
Morocco	8176	9101	8491	8201	8747	7534
Mozambique	135	171	224	228	225	202
Niger	105.5	54	51	59		
Nigeria	736	688	639	616	601	470
Oman	1072	1515	1723	1888	1972	2247
Pakistan	998	1127	1014	938	971	906
Palestine	409	615	469	524	543	478
Qatar		4463	7220	8452	10576	12131
Saudi Arabia	7536	9317	8400	8690	9263	11183
Senegal	464	524	469	495	481	
Sierra Leone	26	44	47	66	35	23
Somalia						
Sudan	82	179	772	773	967	949
Suriname	69	69	79	92	103	99
Syria	6308	1816				
Tajikistan	32	40	60	49	220	146
Togo	105	209	206	233	233	
Tunisia	3477	2529	2931	2863	3042	1869
Turkey	26318	30302	31566	36192	38766	35413
Turkmenistan						
Uganda	802	977	1157	1355	810	1171
United Arab Emirates	8577	9204	10924	12389	13969	
Uzbekistan	121					
Yemen	1291	910	1005	1097	1199	116
OIC Total	133338	138681	147434	155266	167024	139291

Source: UNDATA Online Database, UNWTO Compendium of Tourism Statistics CD-ROM 2017

Note: To make a reliable comparative analysis, countries with missing data are eliminated while calculating the OIC total

	2010	2011	2012	2013	2014	2015
Afghanistan	108	269	103	137	145	135
Albania	1454	1678	1374	1567	1689	1311
Algeria	716	595	598	532	684	765
Azerbaijan	856	1778	2617	3032	3163	2743
Bahrain	684	899	889	873	864	
Bangladesh	852	819	889	1308	782	825
Benin	91	81	96	39.5	54.2	68
Brunei			591	624	616	459
Burkina Faso	110	129	146	215	176	
Cameroon	265	622	668	795		
Chad						
Comoros	33.2	37.4	36.3			
Cote d'Ivoire	569	580	560	583	402	
Djibouti	20.5	33.5	29.6	30.9	21.5	23.4
Egypt	2696	2575	3037	3261	3486	3636
Gabon						
Gambia	11	12	8	11	56	60
Guinea	17	49	41	61		
Guinea-Bissau	29.5	38.6	24.5	27.2		
Guyana	73	79	82	81	77	93
Indonesia	8432	8653	9055	10280	10263	9800
Iran	10570	10555	8435	9380	8989	
Iraq	1675	1879	2363			
Jordan	1736	1280	1257	1206	1251	1267
Kazakhstan	1489	1831	2023	2147	2164	2185
Kuwait	7106	8879	10073	10567	12280	13148
Kyrgyzstan	275	392	529	505	568	445
Lebanon	4868	4440	4511	4692	5198	5187
Libya	2184		2654	2598		
Malaysia	8324	10180	12217	12236	12442	10589
Maldives	252	231	207	252	271	296
Mali	167	171	164	189	231	
Mauritania			101	105	112	73
Morocco	1879	2260	2095	2002	2218	2153
Mozambique	247	264	247	313	331	322
Niger	95	57	132	81		
Nigeria	8348	9533	9240	9150	9068	9200
Oman	1243	1493	1644	1824	2080	2178
Pakistan	1370	1857	1851	1638	2209	2333
Palestine	515	595	643	638	578	431
Qatar		7813	10702	11729	12871	11641
Saudi Arabia	22076	18202	17986	18648	25137	21745
Senegal	217	250	248	265	279	
Sierra Leone	22	26	32	55	24	
Somalia						
Sudan	1127	937	699	460	439	195
Suriname	41	49	58	75	90	128
Syria	1598	850				
Tajikistan	25	13	14	73	35	25
Togo	89	81	46	58	60	
Tunisia	611	678	673	768	770	767
Turkey	5817	5372	4585	5253	5475	5686
Turkmenistan						
Uganda	464	540	642	696	375	573
United Arab Emirates	11818	13206	15072	16188	17740	
Uzbekistan						
Yemen	252	258	148	161	158	79
OIC Total	133.3	138.7	147.4	155.3	167.0	139.3

Source: UNDATA Online Database, UNWTO Compendium of Tourism Statistics CD-ROM 2017

Note: To make a reliable comparative analysis, countries with missing data are eliminated while calculating the OIC total

Table A.6	Balance of International Tourism (Million US\$)					
	2010	2011	2012	2013	2014	2015
Afghanistan	61	-117	74	54	-53	-43
Albania	326	155	249	103	160	303
Algeria	-392	-295	-303	-206	-336	-408
Azerbaijan	-64	-278	17	-414	-450	-208
Bahrain	1479	867	853	992	1051	
Bangladesh	-748	-722	-784	-1177	-628	-676.6
Benin	58.4	120	78	153.5	98.8	92
Brunei			-499	-528	-537	-319
Burkina Faso	-5	-13	-18	-15	7	
Cameroon	-94	-199	-291	-188		
Chad						
Comoros	2	4.8	3			
Cote d'Ivoire	-356	-394	-387.5	-392	-218	
Djibouti	-2.5	-14.3	-9.1	-9.3	3.2	7.5
Egypt	10937	6758	7786	3486	4493	3261
Gabon						
Gambia	69	97	119	92	71	78
Guinea	-14.96	-46.88	-39.32	-61		
Guinea-Bissau	-15.9	-24.1	-17.6	-9.8		
Guyana	7	16	-18	-4	2	-28
Indonesia	-814	385	408	22	1304	2254
Iran	-7939	-8066	-5952	-6168	-5313	
Iraq	61	-322	-723			
Jordan	2654	3071	3866	3939	4267	3730
Kazakhstan	-253	-307	-451	-368	-463	-360
Kuwait	-6532	-8235	-9293	-9948	-11665	-12217
Kyrgyzstan	-63	13	-43	80	-100	36
Lebanon	3158	2357	2850	2340	1637	1900
Libya	-2014		-2544	-2467		
Malaysia	9828	9469	8034	9264	10158	7025
Maldives	1461	1735	1825	2170	2540	2368
Mali	41	47	-20	-10.8	-17	
Mauritania			-51	-55	-70	-42
Morocco	6297	6841	6396	6199	6529	5381
Mozambique	-112	-93	-23	-85	-106	-120
Niger	10.5	-3	-81	-22		
Nigeria	-7612	-8845	-8601	-8534	-8467	-8730
Oman	-171	22	79	64	-108	69
Pakistan	-372	-730	-837	-700	-1238	-1427
Palestine	-106	20	-174	-114	-35	47
Qatar		-3350	-3482	-3277	-2295	490
Saudi Arabia	-14540	-8885	-9586	-9958	-15874	-10562
Senegal	247	274	221	230	202	
Sierra Leone	4	18	15	11	11	23
Somalia						
Sudan	-1045	-758	73	313	528	754
Suriname	28	20	21	17	13	-29
Syria	4710	966				
Tajikistan	7	27	46	-24	185	121
Togo	16	128	160	175	173	
Tunisia	2866	1851	2258	2095	2272	1102
Turkey	20501	24930	26981	30939	33291	29727
Turkmenistan						
Uganda	338	437	515	659	435	598
United Arab Emirates	-3241	-4002	-4148	-3799	-3771	
Uzbekistan	121					
Yemen	1039	652	857	936	1041	37
OIC Total	19821	15582	15408	15800	18728	24234

Source: Calculated based on data in Table A.4 and Table A.5 and UNDATA Online Database

	2010	2011	2012	2013	2014	2015
Afghanistan	0.38	-0.61	0.35	0.25	-0.25	-0.21
Albania	2.73	1.20	2.02	0.81	1.21	2.63
Algeria	-0.24	-0.15	-0.14	-0.10	-0.16	-0.25
Azerbaijan	-0.12	-0.42	0.02	-0.56	-0.60	-0.39
Bahrain	5.75	3.01	2.77	3.05	3.15	
Bangladesh	-0.65	-0.58	-0.61	-0.77	-0.36	-0.35
Benin	0.84	1.54	0.96	1.68	1.03	1.09
Brunei			-2.62	-2.92	-3.14	-2.47
Burkina Faso	-0.06	-0.12	-0.16	-0.13	0.06	
Cameroon	-0.40	-0.75	-1.10	-0.64		
Chad						
Comoros	0.38	0.82	0.53			
Cote d'Ivoire	-1.43	-1.53	-1.45	-1.25	-0.64	
Djibouti	-0.23	-1.24	-0.73	-0.67	0.20	0.43
Egypt	5.10	2.92	2.85	1.30	1.51	1.03
Gabon						
Gambia	7.24	10.73	13.04	10.18	8.36	8.28
Guinea	-0.22	-0.67	-0.54	-0.75		
Guinea-Bissau	-1.87	-2.19	-1.78	-0.94		
Guyana	0.31	0.62	-0.63	-0.13	0.06	-0.85
Indonesia	-0.11	0.04	0.04	0.00	0.15	0.26
Iran	-1.70	-1.36	-1.01	-1.21	-1.25	
Iraq	0.05	-0.20	-0.39			
Jordan	10.04	10.65	12.50	11.73	11.91	9.94
Kazakhstan	-0.17	-0.16	-0.22	-0.16	-0.21	-0.20
Kuwait	-5.66	-5.35	-5.34	-5.71	-7.17	-10.71
Kyrgyzstan	-1.31	0.21	-0.65	1.09	-1.34	0.55
Lebanon	8.22	5.88	6.46	4.96	3.36	3.79
Libya	-2.49		-2.66	-3.22		
Malaysia	3.85	3.18	2.55	2.87	3.00	2.37
Maldives	62.88	70.83	72.47	77.63	82.09	68.93
Mali	0.38	0.36	-0.16	-0.08	-0.12	
Mauritania			-0.97	-0.93	-1.23	-0.84
Morocco	6.76	6.75	6.51	5.78	5.93	5.36
Mozambique	-1.10	-0.71	-0.15	-0.53	-0.62	-0.81
Niger	0.18	-0.05	-1.17	-0.29		
Nigeria	-2.06	-2.14	-1.87	-1.66	-1.49	-1.77
Oman	-0.29	0.03	0.10	0.08	-0.13	0.10
Pakistan	-0.21	-0.34	-0.39	-0.32	-0.50	-0.54
Palestine	-1.19	0.19	-1.54	-0.91	-0.28	0.37
Qatar		-1.97	-1.83	-1.61	-1.08	0.29
Saudi Arabia	-2.76	-1.33	-1.31	-1.34	-2.11	-1.62
Senegal	1.91	1.91	1.55	1.55	1.32	
Sierra Leone	0.16	0.61	0.39	0.22	0.22	0.51
Somalia						
Sudan	-1.94	-1.16	0.12	0.43	0.64	0.80
Suriname	0.64	0.45	0.42	0.33	0.25	-0.59
Syria	7.79	1.75				
Tajikistan	0.12	0.41	0.60	-0.28	2.00	1.54
Togo	0.50	3.47	4.11	4.19	3.78	
Tunisia	6.51	4.04	5.01	4.53	4.77	2.67
Turkey	2.80	3.22	3.42	3.76	4.17	4.14
Turkmenistan						
Uganda	1.71	2.00	2.08	2.52	1.54	2.37
United Arab Emirates	-1.13	-1.15	-1.11	-0.98	-0.94	
Uzbekistan	0.31					
Yemen	3.36	2.10	2.67	2.70	3.06	0.12

Source: Calculated based on data in Table A.6 and GDP figures from World Bank WDI Database

	2010	2011	2012	2013	2014	2015
Afghanistan	33.53	30.61	34.18	31.12	13.74	13.98
Albania	114.52	93.93	82.43	72.53	79.04	85.38
Algeria	0.57	0.41	0.41	0.49	0.58	1.03
Azerbaijan	3.74	5.66	11.06	10.94	12.45	22.11
Bahrain	7.31	5.26	4.86	5.14	5.15	
Bangladesh	0.63	0.42	0.47	0.51	0.54	0.5
Benin	27.98	51.57	37.62	32.28	15.80	15.9
Brunei			0.77	0.93	0.84	2.37
Burkina Faso	17.65	15.34	6.42	10.69	9.16	
Cameroon	4.40	9.36	8.82	13.44		
Chad						
Comoros	112.41	79.59	38.16			
Cote d'Ivoire	2.07	1.68	1.59	1.39	1.44	
Djibouti	3.87	3.59	3.92	4.02	4.47	5.15
Egypt	50.02	29.60	37.01	23.35	29.89	32.66
Gabon						
Gambia	127.07	82.50	94.14	82.80	126.04	129.67
Guinea	0.09	0.10	0.08			
Guinea-Bissau	7.35	4.19	3.50	7.59		
Guyana	7.00	6.53	3.83	5.65	5.72	5.54
Indonesia	4.83	4.44	4.98	5.64	6.56	8.02
Iran	2.66	1.91	2.43	3.79	4.27	
Iraq	3.68	2.17	1.93			
Jordan	73.91	64.63	63.37	76.05	75.93	73.95
Kazakhstan	2.17	1.89	1.84	2.33	2.33	5.19
Kuwait	0.92	0.73	0.75	0.62	0.66	1.69
Kyrgyzstan	16.83	34.62	32.44	40.02	30.69	31.26
Lebanon	207.97	161.79	164.19	181.85	206.32	240.04
Libya	0.38	0.17	0.20	0.34		
Malaysia	9.13	8.61	8.89	9.41	9.65	8.81
Maldives	1264.86	1008.69	1006.22	1078.96	1458.14	1247.4
Mali	69.94	47.33	14.37	25.60	29.74	
Mauritania			1.69	1.60	1.52	1.49
Morocco	49.24	43.78	43.53	37.70	37.06	35.64
Mozambique	6.02	4.75	5.42	5.25	4.27	5.23
Niger	23.68	6.03	5.15	5.25		
Nigeria	0.95	0.65	0.60	0.64	0.65	0.86
Oman	2.93	3.22	3.30	3.35	3.71	2.49
Pakistan	4.69	4.42	4.02	3.57	3.60	3.5
Palestine						
Qatar		4.74	6.73	7.83	10.41	19.22
Saudi Arabia	3.26	2.83	2.30	2.49	2.78	5.37
Senegal	23.81	22.09	20.03	20.29	18.69	
Sierra Leone	8.76	12.36	5.23	3.96	1.76	4.67
Somalia						
Sudan	0.72	1.85	22.94	16.14	22.23	29.95
Suriname	9.35	9.42	11.12	14.15	6.15	6.66
Syria	39.47	10.84				
Tajikistan	2.68	3.97	5.21	4.83	25.96	15.58
Togo	16.10	24.69	19.51	19.49	17.25	
Tunisia	21.94	14.74	17.98	17.53	19.01	13.91
Turkey	23.11	22.46	20.70	23.84	24.60	24.62
Turkmenistan						
Uganda	57.20	58.92	68.23	73.98	42.28	61.54
United Arab Emirates	4.85	3.81	3.97	4.58	5.36	
Uzbekistan	2.13					
Yemen	16.53	9.44	11.44	11.13	12.66	3.66

Source: Calculated based on data in Table A.4 and the Export figures in the IMF DOTS Database

	2010	2011	2012	2013	2014	2015
Afghanistan						
Albania	38	39	46	56	64	71
Algeria	327	592	631	623	572	696
Azerbaijan	611	709	643	574	516	508
Bahrain		4701	5804	6915	8049	9022
Bangladesh						
Benin	91	84	115	115	119	135
Brunei						
Burkina Faso	96	88	89	84	67	66
Cameroon						
Chad						
Comoros						
Cote d'Ivoire						
Djibouti						
Egypt	2359	2020	2490	1968	1811	1927
Gabon						
Gambia			6	7	4	5
Guinea		39	36	19	10	11
Guinea-Bissau						
Guyana						
Indonesia	1336	1361	1414	1569	1653	1710
Iran	2214	2478	3050	4189	4359	4568
Iraq	1448	1479	1055	851		
Jordan	2184	2027	2136	1957	1885	1715
Kazakhstan	2581	3829	4156	4336	3830	4105
Kuwait	3620	3924	4079	4449	4688	5007
Kyrgyzstan						
Lebanon	1232	804	565	494	544	575
Libya						
Malaysia	4085	3991	4309	4470	4855	4591
Maldives	28	36	46	68	78	88
Mali			29	36	42	63
Mauritania						
Morocco	406	447	522	593	561	576
Mozambique						
Niger						
Nigeria	3868	650	835	1086	1080	1358
Oman						279
Pakistan	203	191	134			
Palestine						
Qatar	644	846	953	1090	1124	1300
Saudi Arabia	9988	12657	14192	13565	15855	15020
Senegal						
Sierra Leone	7	10	16	14	6	4
Somalia						
Sudan						
Suriname	31	34	45	51	47	44
Syria	8697	5132				
Tajikistan	127	151	186	181	142	306
Togo	44	57	45	55	56	56
Tunisia	2985	2501	2897	3292	3170	2825
Turkey	4867	5346	5073	6146	7049	7232
Turkmenistan						
Uganda	27	84	49	51	55	51
United Arab Emirates						
Uzbekistan				1748		
Yemen	403	319	370	393	343	140
OIC Total	59082	60909	60356	65284	66754	67736

Source: UNDATA Online Database, UNWTO Compendium of Tourism Statistics CD-ROM 2017

Note: To make a reliable comparative analysis, countries with missing data are eliminated while calculating the OIC total.

Table A.10	Intra-OIC Tourism Receipts (Million US\$)					
	2010	2011	2012	2013	2014	2015
Afghanistan	..	..	..	..	..	..
Albania	28.3	24.7	21.1	28.6	32.4	27.8
Algeria	53.3	74.5	70.0	76.1	89.7	140.7
Azerbaijan	246.6	474.8	681.8	598.7	609.6	642.0
Bahrain	0.0	1233.1	1254.2	1407.4	1474.8	..
Bangladesh	..	..	..	..	..	..
Benin	68.0	80.9	90.7	95.7	75.5	84.4
Brunei	..	..	..	..	..	..
Burkina Faso	39.8	48.1	52.6	83.5	69.9	..
Cameroon	..	..	..	7.3	..	..
Chad	..	..	..	..	..	..
Comoros	..	..	..	..	..	..
Cote d'Ivoire	..	..	..	..	..	..
Djibouti	..	..	..	..	..	..
Egypt	2289.1	1984.8	2407.4	1447.2	1501.2	1454.4
Gabon	..	..	..	..	..	..
Gambia	0.0	..	4.7	4.3	3.6	4.8
Guinea	0.0	0.6	0.6	..	..	..
Guinea-Bissau	..	..	..	..	..	..
Guyana	..	..	..	..	..	..
Indonesia	1481.5	1640.4	1695.5	1872.0	2053.0	2014.6
Iran	..	..	..	..	..	..
Iraq	1655.8	1525.3	1557.9	2087.3	..	..
Jordan	5975.9	5113.5	5007.6	4170.6	4210.8	3473.9
Kazakhstan	1066.8	1425.7	1472.6	1565.9	1428.7	..
Kuwait	3989.9	4534.1	5553.8	4430.4	..	..
Kyrgyzstan	160.7	205.1	390.6	474.5	370.3	350.0
Lebanon	4561.7	3300.4	3044.9	2728.3	2743.2	2685.0
Libya	..	..	..	..	..	..
Malaysia	3016.8	3175.7	3485.6	3737.4	3998.8	3144.1
Maldives	60.0	75.3	98.4	146.0	183.0	190.7
Mali	3.6	5.3	31.6	44.9	53.7	..
Mauritania	..	..	..	..	..	..
Morocco	357.3	435.5	473.0	484.4	476.8	439.4
Mozambique	..	..	..	..	..	..
Niger	..	..	..	..	..	..
Nigeria	465.7	118.7	114234.3	165.7	..	106.1
Oman	..	..	..	..	..	..
Pakistan	223.4	185.8	141.1	..	..	..
Palestine	1.8	6.6	6.5	7.3	4.7	10.0
Qatar	..	2294.7	3627.6	4283.8	5140.2	6242.1
Saudi Arabia	6937.1	8317.2	7299.2	7473.8	8042.7	9334.8
Senegal	0.0	..	..	..	45.1	..
Sierra Leone	4.8	8.5	12.4	11.1	5.0	3.9
Somalia	..	..	..	..	..	..
Sudan	45.1	98.5	399.3	395.3	461.5	443.9
Suriname	0.2	0.3	0.4	0.4	0.5	0.4
Syria	..	..	..	..	..	..
Tajikistan	25.4	33.1	45.7	42.7	147.1	107.9
Togo	..	..	..	..	..	..
Tunisia	1325.6	1100.7	1213.1	1281.8	1346.1	985.4
Turkey	4263.5	4874.4	4697.3	6120.1	7123.4	6733.2
Turkmenistan	..	..	..	..	..	..
Uganda	22.8	71.6	47.9	57.3	35.2	45.6
United Arab Emirates	..	..	..	..	..	..
Uzbekistan	..	..	..	..	..	..
Yemen	..	..	..	..	..	..
OIC Total	44093.9	49264.3	50917.4	54078.1	57150.8	55083.8

Source: Calculated based on data in Table A.3, Table A.4 and Table A.9

Note: To make a reliable comparative analysis, countries with missing data are eliminated while calculating the OIC total