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

COMCEC TOURISM OUTLOOK 2015

COMCEC COORDINATION OFFICE
August 2015

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Preface

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

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

The COMCEC Tourism Outlook 2015 is prepared by Ms. Aslı TAŞMAZ DADAKOĞLU, expert at the COMCEC Coordination Office, with the objective of providing general information on the status of tourism sector in the Member States. This document is an updated version of the COMCEC Tourism Outlook 2014. It dwells on the major issues with regards to tourism sector development in the light of international tourism trends, provides insights on the current status of the OIC Member States and makes comparative analyses with the different country groupings to demonstrate the situation in the Member States and thus the cooperation potential.

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1 Introduction

Tourism industry has experienced continued expansion and diversification, becoming one of the most rapidly developing industries in the world. From an activity maintained by privileged people only some decades ago, tourism today enables more than one billion people to move across international borders each year. Globalization of goods and services, increased leisure time, the technological and transport revolutions and rising middle classes, have positioned tourism as one of the world's leading growth tool. Competition between the tourist-receiving countries has been growing increasingly to obtain the highest share from the expanding international tourism market as a result of the enhanced transportation facilities and additional income allocated to travel expenses, in line with the improving level of welfare.

Tourism has continued to be a critical sector in both advanced and developing economies for economic development, poverty alleviation and sustaining employment. Improvement of the tourism sector contributes to employment, raises national income, and can improve a country's balance of payments. In this regard, the G20 world leaders recognized for the first time, at its June 2012 Summit, the importance of tourism as a vehicle for job creation, economic growth and development. The tourism sector is an important driver of growth and prosperity and can play a leading role in reducing poverty particularly in developing countries and the Least Developed Countries (LDCs).

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

This Outlook 2015 aims to provide a brief account of the situation in the OIC Member Countries. In this respect, the major issues with regards to tourism sector development in the light of international tourism trends, the current status of the member countries and some comparisons regarding competitiveness of the OIC Member States will be analyzed.

2 The Importance of Tourism for Development

A strong tourism sector contributes in many ways to development and the economy. It makes both direct contributions, by raising the national income and improving the balance of payments, and indirect contributions, via its multiplier effect and by providing the basis for connecting countries, through hard and soft infrastructure—attributes that are also critical for a country's general economic competitiveness.

Over the past decades, many new destinations have emerged, challenging the traditional ones of Europe and North America. For many developing countries, tourism is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development. The main positive economic impacts of tourism relate to foreign exchange earnings, contributions to government revenues, generation of employment and business opportunities. Local tourism jobs and business opportunities help to reduce rural-urban migration, while opening doors to the young and fostering gender equality through job opportunities.

Based on the information from countries with data available, the World Travel & Tourism Council (WTTC) estimated that travel & tourism's contribution directly to worldwide gross domestic product (GDP) was 3.1% in 2014 and is expected to rise by 3.7% in 2015. With direct and indirect effects of more than 185 supply-side economic activities that have significant connections to tourism, its contribution to GDP is 9.8%, a total of US$7.6 trillion, and is expected to grow by 3.7 to US$7.9 trillion. It is also estimated that travel and tourism sector have attracted capital investment of US$814 billion in 2014 (WTTC, 2015).

It provided 105 million direct (3.6% of total employment) jobs in 2014 and direct contribution to employment is expected to rise by 2 % in 2015. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment, banking & finance and promotion and publicity services, tourism's contribution to employment tends to be slightly higher. In 2014, nearly 277 million jobs were supported in tourism related industries (WTTC, 2015). Tourism's contribution is estimated as 6-7% of the overall number of jobs or one in 11 jobs globally (UNWTO, 2015a). According to the WTTC, this ratio could even rise to one in 10 jobs by 2022.

Figure 2.1 Why Tourism Matters?

Source: UNWTO, Tourism Highlights 2015 Edition.

According to the UNWTO, total exports earnings generated by international tourism in 2014 reached US$ 1.5 trillion. Tourism exports account for as much as 30% of the world's exports of commercial services and 6% of overall exports of goods and services. Globally, tourism ranks

fourth after fuels, chemicals and food products as an export category. However, in emerging economies, tourism ranks third after fuels and food category (UNWTO, 2015b).

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

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

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

3 Overview of International Tourism in the World

3.1 Key Tourism Trends in the World

The last six decades have witnessed extraordinary growth of tourism sector. In spite of the multiple challenges and shocks –from man-made crises, to natural disasters and economic crises, from which the world is still recovering– tourism, although vulnerable, has always bounced back, proving its resilience and capacity to rebound. The next two decades will be of sustained growth for the tourism sector. International tourist arrivals are estimated to increase on average by 43 million annually between 2010 and 2030 (Tourism Towards 2030, 2012).

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

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

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

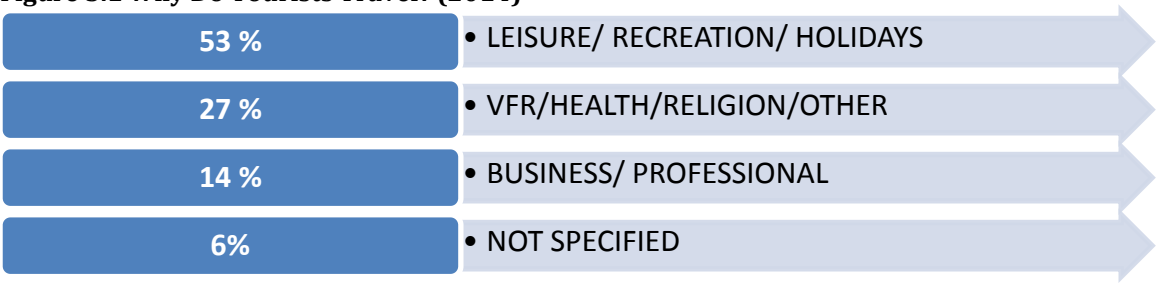
According to Tourism Towards 2030; by 2030, 58% of international arrivals will be recorded in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa (Tourism Towards 2030, 2012).

Asia and the Pacific will gain most of the new arrivals. South Asia will be the sub-region with the fastest growth in international arrivals. North-East Asia will be the most visited sub-region in 2030 (Tourism Towards 2030, 2012).

It is known that air transport industry has substantially reduced travel time and travel costs for longer haul travel. Air transport will continue to increase its market share, but at a much slower pace. The cost of air transport will cease declining, and is assumed to grow at an average annual rate of 1.1% per year from 2010 to 2030 (Tourism Towards 2030, 2012). In 2014, over half of all overnight visitors travelled to the destinations by air (54%), while the remainder travelled by surface transport (46%)- whether by road (39%), rail (2%) or water

(5%)(UNWTO,2015). The trend over time has been for air transport to grow at a faster pace than surface transport, thus the share of air transport is gradually increasing.

Figure 3.1 Why Do Tourists Travel? (2014)



Source: UNWTO Tourism Highlights, 2015 Edition

Arrivals for visiting friends and relatives (VFR), health, religion and other purposes grow slightly faster than arrivals for leisure or business. By 2030, VFR, health, religion and other purposes will represent 31% of all international arrivals, leisure, recreation and holidays 54%, and business and professional 15% of all international arrivals (Tourism Towards 2030, 2012).

Arrivals for leisure, recreation and holidays will grow at the same rate as the total of arrivals (3.3% a year), while arrivals for the purpose of visiting friends and relatives (VFR), health, religion and other will grow slightly faster, at 3.5% year, and arrivals for business and professional purposes slightly slower, at 3.1% a year (Tourism Towards 2030, 2012).

It is known that tours and city holidays by travelers in emerging markets have driven tourism growth in the last years. The volume of city trips has increased by 47% since 2009. Tours grew by 27% due to more long-haul trips.

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

- Long-haul travel and overseas travel will increase and new destinations in relevant regions will gain importance.
- Electronic media (CD-ROM maps, Internet, web sites, etc.) will be increasingly more important for the purpose of choosing destinations and making reservations.
- In line with the increasing education and welfare level of individuals, the number of experienced traveler groups will increase.
- Preferences of tourists will become polarized and demand for innovation and variety will rise; the emphasis will be on comfort and adventure. For product development, 3S (i.e., sun-sand-sea) will be replaced by 3E (i.e., excitement-education-entertainment).
- In parallel with an increase in average human life expectancy, retirement period will be longer and people will have more time for vacation.
- Singles, and couples without children, and 65+ ("the third age") groups are anticipated to constitute the larger percentage of the world population with more resource

allocated to travel and entertainment. By the year 2030, the fastest increases in those 65 and older are occurring in developing countries, which will see a jump in those populations of 140 percent. By 2040, the global population is projected to number 1.3 billion older people—accounting for 14 percent of the total (Hammond R., 2011).

- Average working time will decrease and people will have more time for vacation.
- Consumers will be informed and protected within the framework of universal systems, and the influence of campaigns addressed to consumers for a lasting and balanced development of tourism will be stronger.

Internet increased its dominance as a booking channel to 66% in 2014 with a rise a 7% rise in bookings worldwide but there are signs that this trend could be reaching saturation level at about 70% in mature markets. The global market share of travel agency bookings has more or less stabilized at 24%. It is expected that first-time travelers still need to support of travel agencies and the down-ward trend for them seems to have stopped at around 20% (ITB World Travel Trends Report 2014/2015).

Online bookings continued to increase in 2014 with the use of smartphones. China (10% share) took first place in the share rankings, followed by the USA (7% share) and Japan (5% share) for booking travel via smartphones. In addition, social media channels such as review portals, blogs and forums have also become very popular for planning trips, and are used intensively by more and more by travelers across the globe to plan trips.

In fact, 92% of social media users have been influenced by travel blogs and ratings in 2014 with up to 72% willing to change their destination choice based on the opinion of friends and networks on social media. In China, up to 95% of travelers use travel blogs as a source of travel information. Comparatively, 86% Indian travelers and 66% of European travelers are influenced by the content of travel blogs.

Youth travel was seen as a small part of the tourism sector, characterized by low spending. According to UNWTO, the number of trips by young people might increase from 200 milion in 2013 to 300 million by 2020. Younger travelers (especially “millennials”) are characterized by distinctive travel preferences. They are not very much interest in traditional vacations packages but they are motivated by increasing their knowledge about the world and experiencing everyday life in other countries, according to a recent survey by the World Youth Student and Educational Travel Confederation. They tend to spend more time exploring more remote destinations and have less interest in luxury.

“Low-cost accommodation” will be the next trend in travel and tourism after the “low-cost flights” over the last decade. In the international hospitality market, different kinds of low cost accommodation have emerged such as budget hotel chains (ITB, 2014).

In recent years, it can be realized that industry players have made commitments to a low-carbon economy through several initiatives aimed at optimizing operations, recycling, and preserving the environment (WEF, 2013).

3.2 International Tourist Arrivals

According to the UNWTO, international tourist arrivals grew 4.4% in 2014, equivalent to 48 million more arrivals and 1.135 million tourists. Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 529 million in 1995 and 1.135 million in 2014 (UNWTO, 2015). UNWTO remarks that international tourism figures were above the expectations with additional 48 million tourists travelling around the world in 2014, but slightly below the 4.7% growth achieved in 2013. Despite ongoing geopolitical, economic and health challenges in some parts of the world, demand continued to be strong in most of the destinations.

Growth is expected to continue in 2015 according to the 2014 level (nearly +4%) and will be above the UNWTO's long term projections (for 2030: +3.8% a year on average between 2010 and 2020). In the first two months of 2015, international tourist arrivals grew an estimated 5% compared to the same period of 2014. Although this trend is primarily driven by increasing demand from the emerging-market middle class (especially Asia &Pacific and Africa), the picture has also been brightening for many developed economies. Arrivals were slightly higher in emerging economies (+5%) than in advanced economies (+4%)

Table 3.1 International Tourism Arrivals and Tourism Receipts

	2000	2005	2010	2011	2012	2013	2014	2015*
Number of tourists (millions of people)	678	809	949	997	1.038	1.087	1.135	1.175
Annual change (percent)	8,1	5,9	6,5	5,1	4,2	4,7	4,4	3-4
Tourism receipts (billion dollars)	476	681	931	1.042	1.078	1.197	1.245	-
Annual change (percent)	-	-	9,4	12,0	3,2	7,4	4,0	-

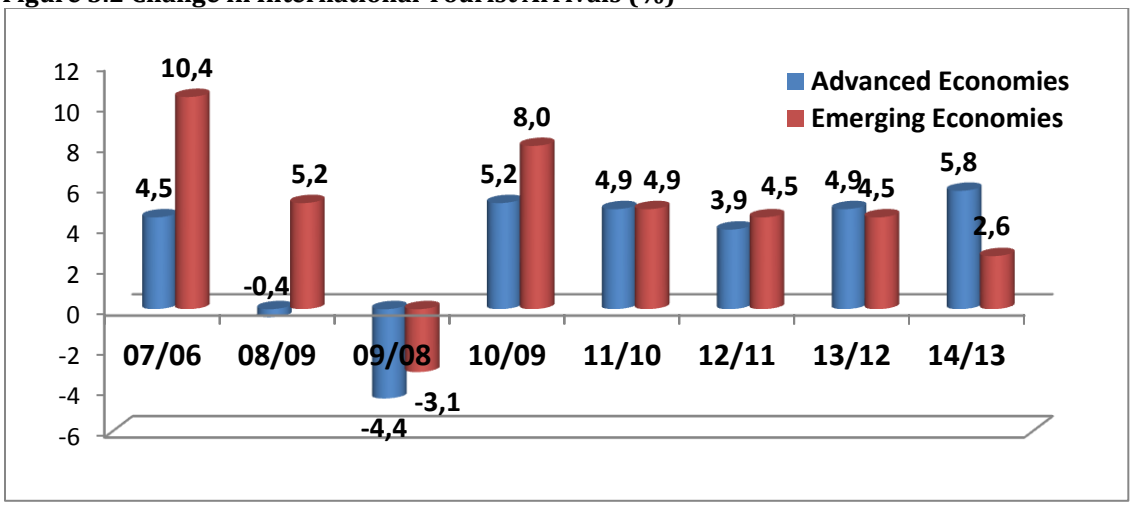
* Forecast
Source: World Tourism Organization

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

According to the UNWTO, emerging economies (+2.6%) were below the advanced economies (+5.8%), with Americas (+8.1%) showing the strongest results in 2014.

According to the Figure 3.3, it can be seen that the growth of international tourist arrivals in emerging economies is greater than advanced economies for the years 2007-2012. However, since 2013, advanced economy destinations showed relatively faster growth in tourist arrivals than emerging economy destinations. In 2014, the growth in arrivals was 5.8% for the advanced economies, while it was 2.6% for the emerging economies.

Figure 3.2 Change in International Tourist Arrivals (%)



Source: World Tourism Organization, Tourism Barometer 2015 April

In terms of regions, the UNWTO stated that Americas (+8%) was the best performer in 2014 and the number of international tourists grew by 14 million to reach 182 million in this region.

Table 3.2 International Tourism Arrivals by Region (Millions)

Tourist Arrivals	2000	2010	2012	2013	2014	Share (%)
World	**674**	**949**	**1.038**	**1.087**	**1.135**	**100**
Europe	386.4	488.7	540.0	566.6	583.6	51.4
Asia&Pacific	110.3	205.4	233.8	249.8	263.4	23.2
Americas	128.2	150.1	162.5	168.0	181.5	16.0
Africa	26.2	49.7	52.2	54.8	55.8	4.9
Middle East	22.4	54.8	49.8	48.2	50.4	4.4

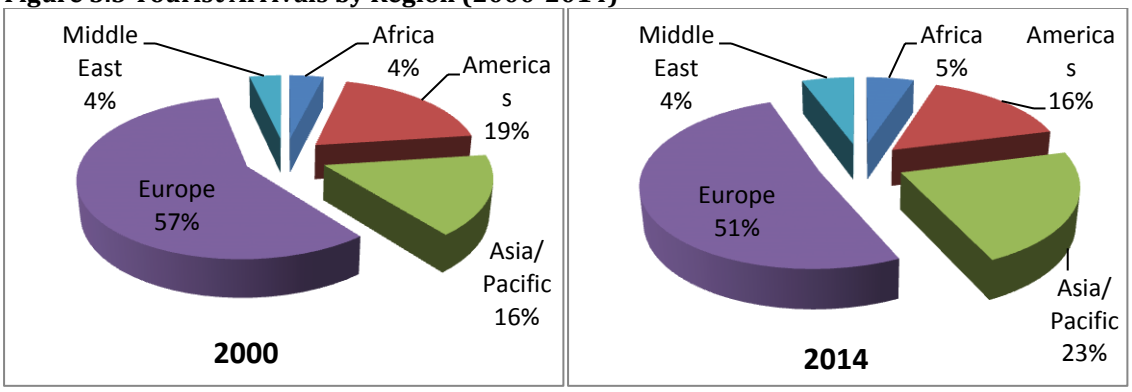
Source: World Tourism Organization, Tourism Barometer Volume 13, April 2015

According to the Table 3.2, **Europe** (+3%), **Asia and the Pacific** (+5.4%), **the Americas** (+8.1%), Middle East (+4.6) and **Africa (**+1.8%) showed continued growth in 2014.

In 2014, international tourist arrivals grew by 4.4%, equivalent to 48 million more tourists and reached to 1.135 million arrivals. This year, Europe welcomed an additional 17 million international tourist arrivals. In relative terms, growth was strongest in Americas, where the number of international tourists grew by 14 million. The Asia & Pacific region realized an increase of almost 14 million, Africa region attract 1 million additional tourist arrivals. Contrary to the last year, there were an increase in arrivals as 2.2 million tourist in Middle East. International tourism in the Middle East (+5%) rebounded after two years of decline, showing good results in most of the destinations.

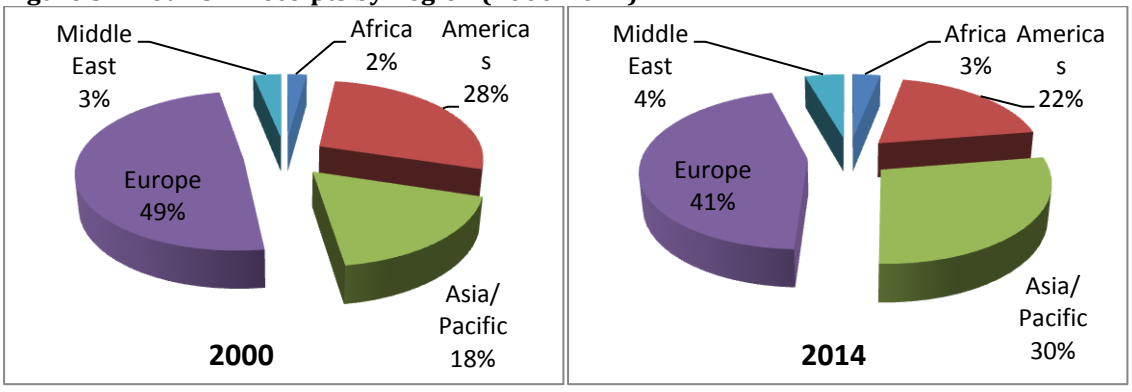
To analyze the tourism trends in these regions, it would be beneficial to compare the results of the last decade. The figure below compares the shares of tourist arrivals and tourism receipts by regions for the years 2000 and 2014.

Figure 3.3 Tourist Arrivals by Region (2000-2014)



Source: UNWTO, 2015

Figure 3.4 Tourism Receipts by Region (2000-2014)



Source: UNWTO, Tourism Highlights 2013 Edition & Tourism Barometer Volume 13 April 2015

The figures demonstrate that there is a tendency of increase in both tourist arrivals and tourism receipts in Asia-Pacific Region and decrease in both tourist arrivals and tourism receipts in Europe and Americas Region.

In 2015, growth is expected to continue at a sustained rate of 3% to 4 % worldwide.

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

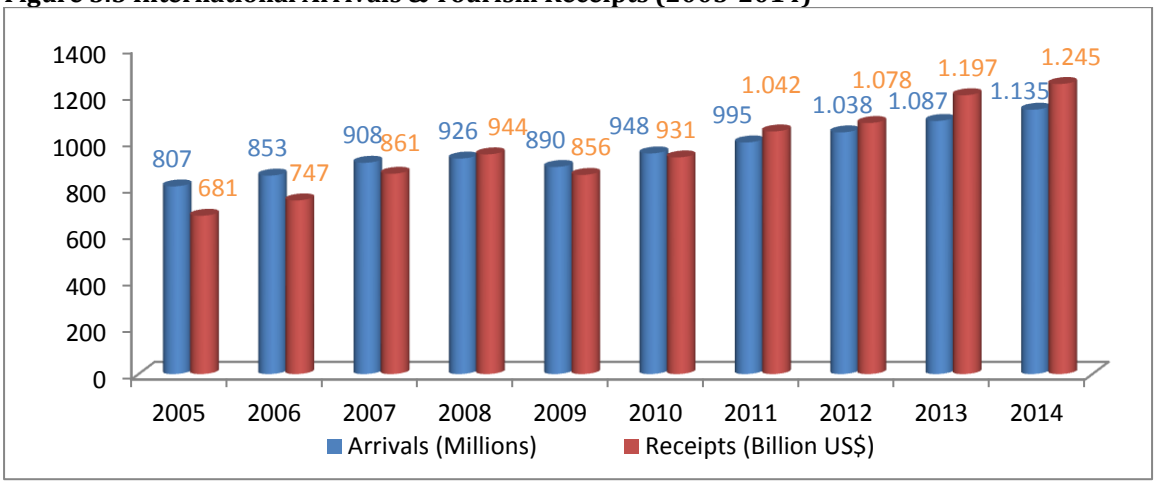
International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4 percent a year) of advanced-economy destinations (2.2 percent a year). In 2030, 57 percent of international tourist arrivals is expected to be occur in emerging-economy destinations (versus 30 percent in 1980 and 47 percent in 2010).

3.3 International Tourism Receipts

As an internationally traded service, inbound tourism has become one of the world's major trade categories. International tourism accounts for 30% of the world's export of services and 6% of overall exports and goods and services. International tourism receipts are the earnings generated in destination countries from expenditure by international visitors on accommodation, food and drink, local transport, entertainment, shopping and other services and goods. For the receiving country receipts count as exports and for many destinations tourism is a vital source of foreign currency earnings and an important contributor to the economy, creating much needed employment and opportunities for development. From the period 1980 to 2014, international tourism receipts increased from US$ 125 billion in 1980 to US$ 1,245 billion in 2014 (UNWTO, 2015). In real terms, this corresponds to an average growth of 4 percent a year, which is virtually the same pace as tourist arrivals.

The Figure 3.5 shows the international tourism receipts as well as tourist arrivals for the period 2005-2014. International tourism receipts grew by 3.7% in real terms (i.e. using local currencies at constant prices in order to adjust for inflation and exchange rate fluctuations) in 2014 by reaching to US$ 1,245 billion. In absolute terms, international tourism receipts in destinations around the world increased by US$ 48 billion. Advanced economy destinations (+3.2%) recorded somewhat slower growth in receipts than emerging economy destinations (+4.7%).

Figure 3.5 International Arrivals & Tourism Receipts (2005-2014)



Source: UNWTO

In 2014, the export value of international passenger transport is estimated at US$ 221 billion. As such, total receipts from international tourism, including international passenger transport, reached US$ 1.5 trillion in 2014. This means that international tourism contributes US$ 4 billion a day to global export earnings. With excluding passenger transport, international tourism receipts reached US$ 1.245 billion in 2014,

Both Euro and US dollar maintained an average exchange rate for 2014 rather similar to the average for 2013. Both of Euro and US dollars appreciated against other currencies. In 2014, the exchange rate of the US dollar and the euro remained virtually unchanged at about euro 0.75 per US dollar (1.33 US dollars per euro), after having depreciated 3% in 2013. This means

that the exchange rate effect on tourism receipts in Euro-area destinations (expressed in US dollars) was minimal.

However, both the US dollar and the euro appreciated against other currencies, including the Russian rouble (+20%), the Turkish Lira (+15%), the South African rand (+12%), the Brazilian real (+9%) and the Japanese yen (+8%), meaning nominal tourism receipts in these countries (expressed in US dollars) declined due to the increase in value of the US dollar. The major exception was the British pound sterling, as both the US dollar and the euro depreciated 5% against this currency (UNWTO, 2015).

By region, the largest increase in receipts for the Middle East was recorded as an increase +5.7% (i.e. constant price change) in 2014, followed by Asia and Pacific (+4.2%), Europe (+3.6%) and Africa (+3.4).

Table 3.3 International Tourism Receipts by Region (Billion $)

Tourism Receipts	2000	2012	2013	2014	Share (%)
World	**475**	**1,078**	**1,197**	**1,245**	**100**
Europe	234.5	454.0	491.7	508.8	40.9
Asia & Pacific	86.7	329.1	360.7	376.9	30.3
Americas	132.8	212.9	246.4	274.0	22.0
Africa	10.8	34.3	35.1	36.2	2.9
Middle East	12.7	47.5	45.1	49.2	4.0

Source: UNWTO, Tourism Highlights, 2002&2013 Edition& Tourism Barometer Vol. 13, April 2015

According to the UNWTO; Americas, which accounts for 22% of international tourism receipts worldwide, shows the biggest growth in absolute terms, i.e. up US$ 28 billion to US$ 274 billion. By taking 30% of worldwide tourism receipts, Asia and the Pacific increased its tourism earnings by US$ 16.2 billion to US$ 377 billion, and in the Europe (41% share) earnings were up by US$ 17 billion to a total of US$ 509 billion.

4 International Tourism in the OIC Member Countries

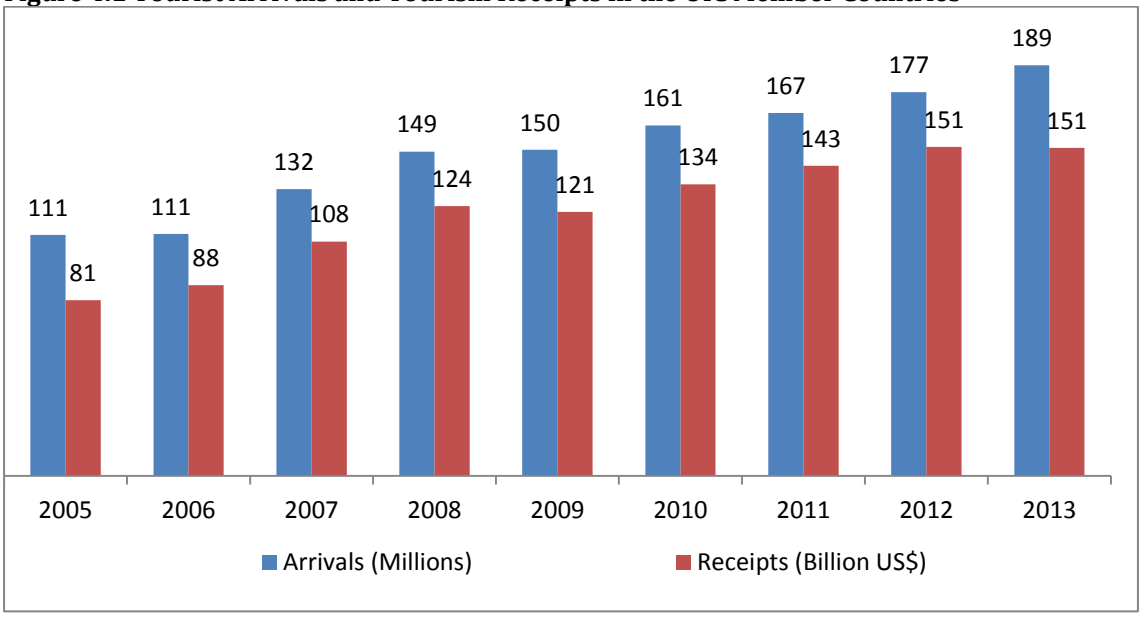
In the light of the above mentioned overview of the trends in international tourism, this section aims to assess the performance and economic role of the international tourism in the Member Countries.

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

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

In fact, international tourism activity in the Member Countries has been growing in terms of both tourist arrivals and tourism receipts in recent years. During the 2005-2013 period, shown in Figure 4.1, both tourist arrivals and tourism receipts increased.

Figure 4.1 Tourist Arrivals and Tourism Receipts in the OIC Member Countries

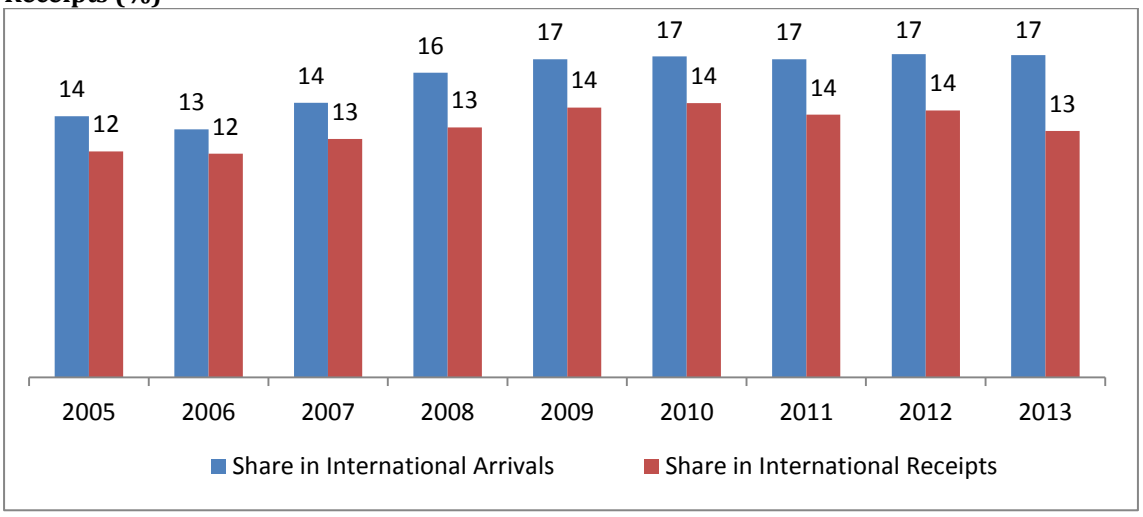


Source: adopted from SESRIC, 2015

For the number of tourist arrivals and tourism receipts of some countries, estimations are made to overcome the unavailability of the data problem.

The number of tourist arrivals of the Member Countries increased to 189 million in 2013, corresponding to a 17 per cent share in the total international tourist arrivals worldwide. International tourism receipts amounted to $151 billion in the same year corresponding to a 13 per cent share in world's total tourism receipts. Tourism receipts remained same in 2013 and the share in tourism receipts of Member States decreased in international tourism market.

Figure 4.2 Share of the OIC Member Countries in International Arrivals and International Receipts (%)



Source: adopted from SESRIC, 2015

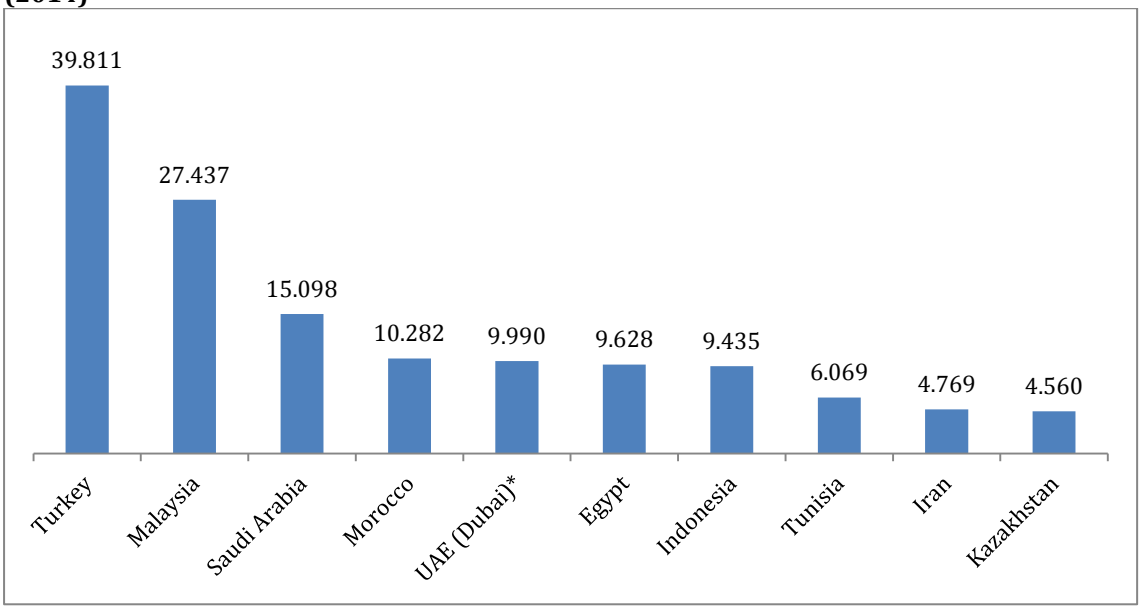
The Figure 4.3 and 4.4 demonstrate the top 10 Member States in terms of international tourist arrivals and tourism receipts. The remaining OIC Member Countries' tourist arrivals and tourism receipts data are given in Appendix (Table 1 and Table 2).

Growth was common to almost all the countries in the region, but was particularly strong in countries such as Turkey, Indonesia, Malaysia, Saudi Arabia and Egypt.

In 2014, a series of external factors favor the positive outlook in international tourism market, including the sharp drop in oil prices to 2009 levels. Cheaper oil is expected to lower transport costs and increase tourism demand, especially in energy importing economies. According to the International Air Transport Association (IATA), lower oil prices could result in a 5% drop in passenger airfares, and a 6% decline in cargo rates. However, this situation could also negatively impact some of the oil exporting countries which have emerged as strong tourism source markets.

The distribution of the tourist arrivals and tourism receipts among the OIC Member States has demonstrated the fact that international tourism in the Member Countries is concentrated in a few countries. In terms of tourist arrivals, Turkey, Malaysia, Saudi Arabia, Morocco, United Arab Emirates (UAE), Egypt, Indonesia, Tunisia, Iran and Kazakhstan were the top 10 international tourist destinations among the Member Countries in 2014.

Figure 4.3 Top 10 OIC Tourism Destinations in International Tourist Arrivals (Thousand) (2014)



Source: UNWTO, Tourism Barometer, Volume 13, 2015 April
*2013 data

As shown in the Figure 4.3, these 10 countries together hosted 137.1 million international arrivals in 2014 which means there was a 5.5% increase compared to 2013 in these countries. It is worth mentioning that among these countries, Turkey and Malaysia were also ranked 6th and 12th, respectively among the Top world tourist destinations in 2014.

According to UNWTO, Turkey (+5.3%) hosted 39.8 million tourists in 2014. The conflict in Ukraine has already disrupted tourism in Turkey in 2014, and has been one of the factors behind the weakened outbound demand from the Russian Federation.

Malaysia, an important destination in the OIC Member Countries, realized 6.7% more arrivals in 2014. Malaysia celebrated the Visit Malaysia Year 2014 with a series of year-long special events and activities and hosted more tourists in 2014. Malaysia has launched appealing tourism campaigns this year as Malaysia Year of Festivals 2015. So, it is expected that the tourist arrivals to Malaysia will continue to rise in 2015.

Saudi Arabia recorded healthy growth with 13% increase in tourist arrivals. Saudi Arabia is expected to increase the tourist arrivals between 2015 and 2019, with increasing numbers of business travelers and religious visitors boosting the tourism market within the country. With the governmental support, transport infrastructure investment and foreign hotel group development in the country, the improvement in the industry continues. Major airport developments in Jeddah and Riyadh are well under way and are likely to help arrival figures reach 19.5 million by 2019. (BMI Research, 2015).

Egypt (+5%) showed solid growth in 2014. Egypt saw a rebound in the second half of 2014, after a drop in arrivals in the first half, resulting in an aggregate 5% increase for the full year. The rebound followed the lifting of travel warnings by major European source markets, while the Egyptian tourism campaign "Masr Wahashtouna" has brought an increase in demand from neighboring Middle Eastern markets. It is monitored in Egypt that tour operators return to the country (UNWTO, 2015).

Indonesia reported a solid growth with an increase of (+7%) in tourist arrivals. International arrivals are growing steadily and demand for high-end luxury resorts in key locations such as Bali is strong in the country. At the same time, domestic economic growth is boosting both internal travel and outbound travel which supports higher rates of tourism related expenditure. With the government increasingly supportive of the tourism industry and investment in supporting transport infrastructure gathering pace, there is an optimistic picture for tourism in Indonesia. Inbound arrivals are expected to increase by 4% in 2015, with weakness in European source markets offset by stronger growth from North America, leading to a total arrivals figure of just over 9.4 million.

Growth in Lebanon (+6%) also picked up in the third quarter of 2014 (UNWTO, 2015). Lebanon saw an increase in 2014 after two years of decreases as -18 % in 2012 and -7% in 2013.

Qatar posted a solid 8% increase in arrivals in 2014, with figures almost doubling in the past five years (from 1.5 million arrivals in 2009 to 2.8 million in 2014). Meanwhile, Jordan (+1%) and the United Arab Emirate of Dubai (+2%) saw more moderate growth for the year to date, the latter after four years of strong results. In Dubai the development of cruise and MICE tourism is advancing. This is expected to attract a wider range of tourists in the future, especially from markets such as India, South America and China (UNWTO, 2015).

As one of the leading destinations in North Africa, international tourist arrivals in Morocco grew by a modest 2% increase in 2014. Albania (+13%), one of the emerging destinations, saw growth in double-digits, as a result of product development and new tourism marketing campaigns.

International crises and health concerns could affect economic and tourism activity in 2015, at least regionally. For example, the conflict in the Middle East has also impacted a number of destinations, which could continue into 2015.

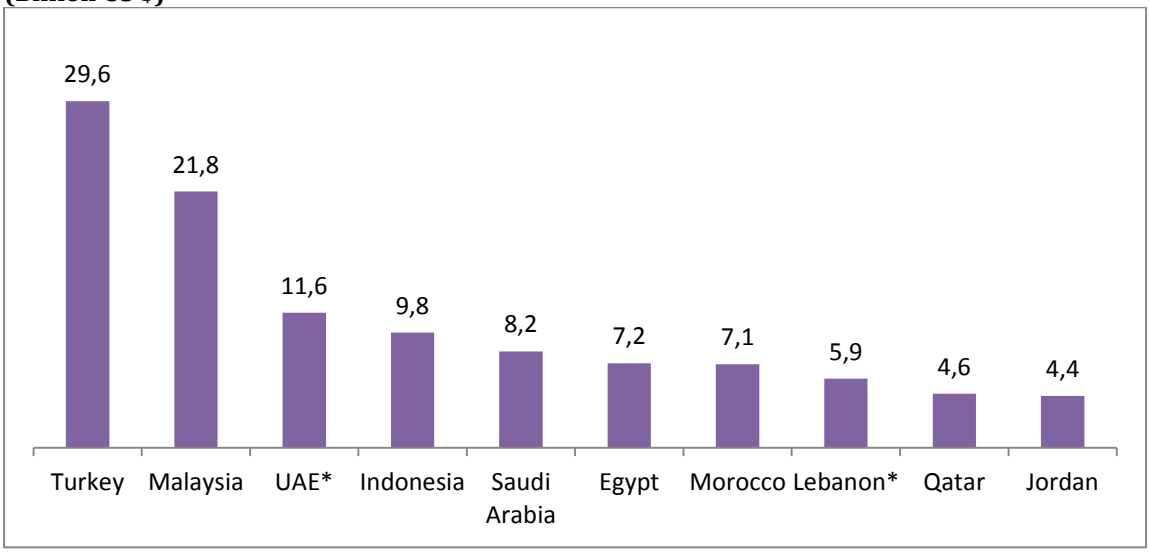
The Ebola disease outbreak in West Africa has had a negative impact on many African destinations outside the three directly-affected countries (Sierra Leone, Guinea and Liberia), due mostly to misperceptions about the outbreak and its geographical impact. Sierra Leone, one of the countries affected by the Ebola outbreak, reported a 46% decrease in arrivals in 2014 after several years of double-digit growth on a low base. While there is no available information on arrivals for Guinea and Liberia, real time aviation data from OAG reports shows that total seat capacity from the three directly affected countries was down 65% in January 2015 compared to the same month last year (UNWTO, 2015)

World Health Organization (WHO) reported that this is the most severe and complex outbreak of Ebola in the history of the disease. According to WHO, although cases are declining in all

three affected countries and the worst case scenario has been avoided, the response momentum must be maintained and proven public health measures must continue in 2015 to eradicate the disease.

Concerning the international tourism receipts, top 10 Member Countries, shown in Figure 4.4, earned US$ 110 billion as international tourism receipts in 2014. It is worth mentioning that among these countries, Turkey and Malaysia were also ranked 12th and 13th, respectively among the Top world tourism earners in 2014. Moreover, since United Arab Emirates and Lebanon did not reported tourism receipts data for 2014, last year's data is used. Indonesia and Egypt climbed respectively one and three places in the ranking by international arrivals.

Figure 4.4 Top 10 OIC Tourism Destinations in International Tourism Receipts in 2014 (Billion US $)



Source: UNWTO, 2015
*2013 data

As in the case of OIC tourist arrivals, the Figure 4.4 indicates that tourism receipts in the OIC countries are concentrated in a small number of countries, almost the same countries of the main COMCEC tourist destinations.

Furthermore, it seems that Turkey (US$ 29,6 bn, +6% in 2014), Malaysia (US$ 22 bn, +5% in 2014) United Arab Emirates (Dubai) (US$ 12 bn, +11% in 2013) and Indonesia (US$ 9.8 bn, +8%) will continue to be markets with potential for coming years. In addition to these, Saudi Arabia (US$ 8 bn, +8% in 2014) and Egypt (US$ 7.2 bn, +19% in 2014 after fall of 39% in 2013), all have gained positions in recent years.

In order to compare the performance of the countries, major surplus on the travel balance would be a useful tool, since it shows that more foreign exchange stays in the country. Table 4.5 shows member countries by major surplus on the travel balance.

Table 4.1 Member Countries by Major Surplus/Deficits on the Travel Balance In 2012-2014 (US$ billion)

	Tourism Receipts			Tour. Expenditures			Balance		
	2012	2013	2014	2012	2013	2014	2012	2013	2014
Turkey	25.3	28.0	29.6	4.1	4.8	5.1	21.3	23.2	24.5
Malaysia	20.2	21.5	21.8	12.2	12.2	12.2	8.0	9.3	9.6
Morocco	6.7	6.9	7.1	1.3	1.3	1.4	5.4	5.5	5.6
Egypt	9.9	6.0	7.2	2.6	3.0	3.1	7.3	3.0	4.1
Jordan	4.1	4.1	4.4	1.1	1.1	1.1	2.9	3.0	3.2
Kuwait	0.4	0.3	0.4	9.2	11.6	11.3	-8.8	-11.3	-10.9
S. Arabia	7.4	7.7	8.2	17.0	17.7	24.1	-9.6	-10	-15.9
UAE	10.4	11.6	-	15.1	17.7	-	-4.7	-6.1	-
Indonesia	8.3	9.3	9.8	6.8	7.7	7.7	1.5	1.6	2.1
Qatar	2.9	3.5	4.6	5.6	6.6	8.7	-2,7	-3.1	-4.1
Lebanon	6.3	5.9	-	3.9	4.4	-	2.4	1.5	-

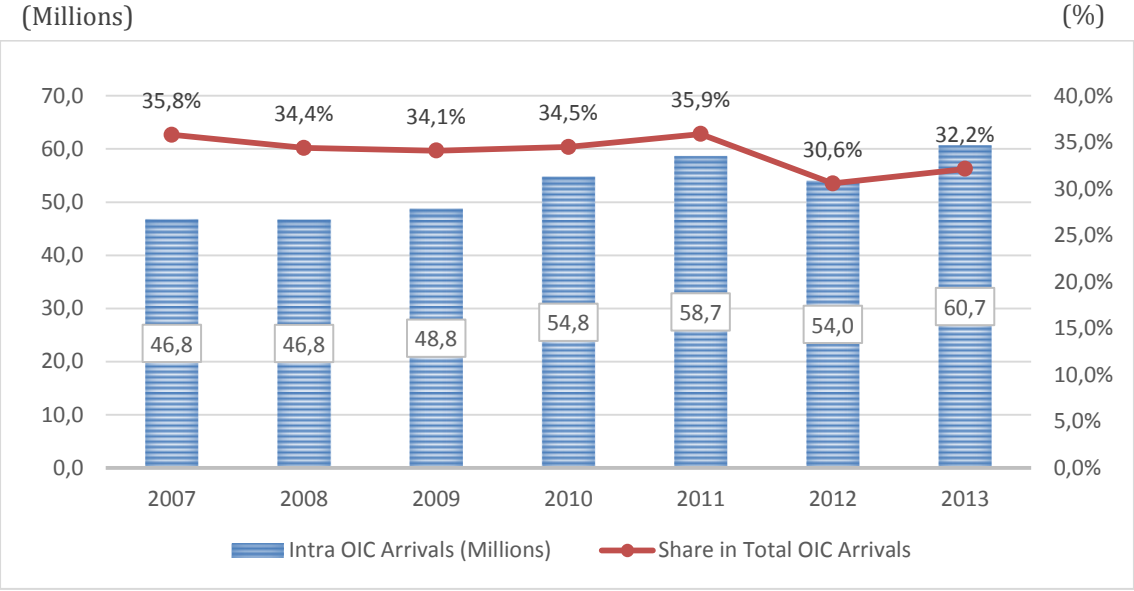
Source: UNWTO, 2015

According to the Table 4.1, Turkey ranks as 5th, Malaysia as 10th, Morocco as 17th, Egypt 22th and Jordon as 22th country by major surplus on the travel balance in international tourism market. In 2014, Turkey's tourism receipts were US$ 29.6 billion, however Turkish citizens spent US$ 5.1 billion in other countries. This means that US$ 24.5 billion stayed in the country as a surplus on the travel balance. This surplus is very important for countries as a source of foreign exchange in their economies. It can be realized from the Table 4.1 that some countries have a tendency to spend more than their tourism receipts. It is obvious that the majority of these countries are the main OIC international tourism destinations and earners. It is also observed that the balance of international tourism of some member countries accounts for a high percentage of their international tourism receipts. For example, countries like Saudi Arabia, Kuwait, United Arab Emirates and Qatar have deficits on travel balance.

In future, long-haul travels increase rapidly, so countries should make provision for attract high profile tourists not to have problems in the balance of economy. It is clear that to attract high profile tourists, the Member Countries should make arrangements in their tourism policies such as diversification of tourism types and products, increasing quality of tourism services and making new investments in tourism, etc.

As shown in Figure 4.5, in 2013, in terms of the number of tourist arrivals, intra-OIC tourism reached 60.7 million tourists. In 2013, tourist arrivals account for 32.2% of the total tourists arrivals in the OIC Member Countries. Although intra-OIC tourist arrivals have increased from 2007 to 2013, the share of intra-OIC tourist arrivals in total OIC international tourist arrivals have stayed stable in the same period, as shown in the Figure 4.5.

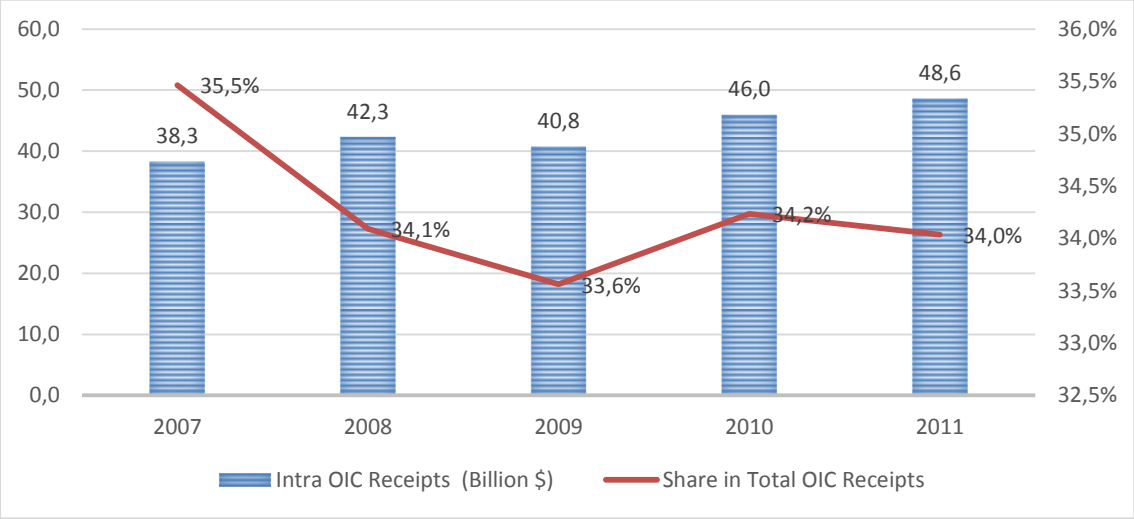
Figure 4.5 Intra-OIC Tourist Arrivals 2007-2013



Source: SESRIC, 2015

A similar trend is observed in the case of the intra-OIC tourism receipts during the period 2007-2011. It can be seen that intra-OIC tourism receipts increased up from US$ 38.3 billion in 2007 to US$ 48.6 billion in 2011. Figure 4.6 shows that US$ 48.6 billion account for 34% of the total international tourism receipts in the Member Countries for the year 2011.

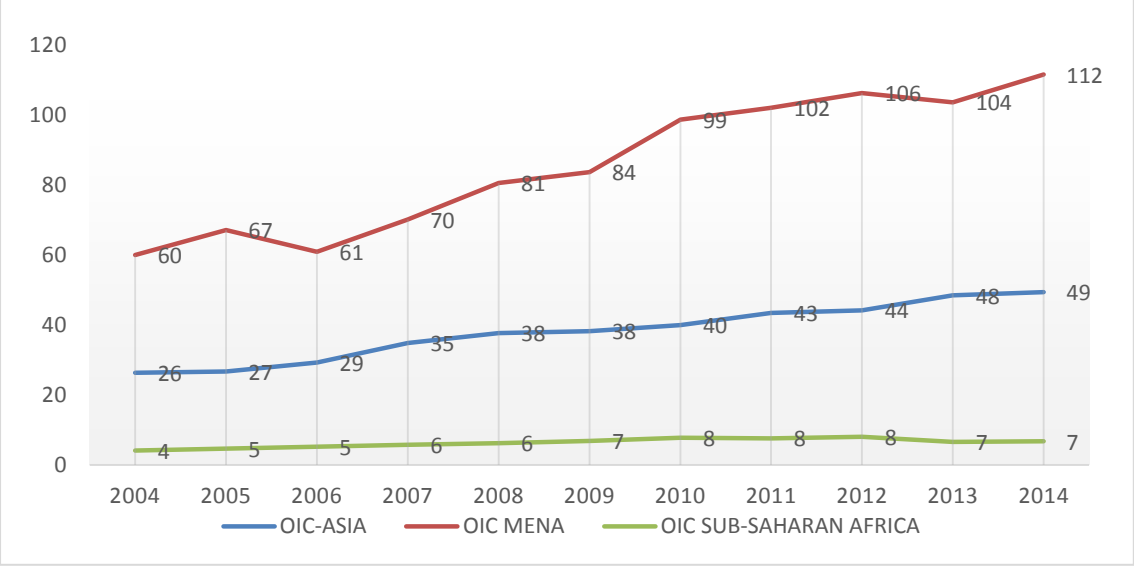
Figure 4.6 Intra-OIC Tourism Receipts



Source: SESRIC, 2014

It can be useful to analyze the trends by grouping the OIC member countries as OIC-MENA, OIC-Asia, and OIC-Sub-Saharan Africa, which are provided at Figure 4.7.

Figure 4.7 Tourist Arrivals in the OIC Regions (Millions)

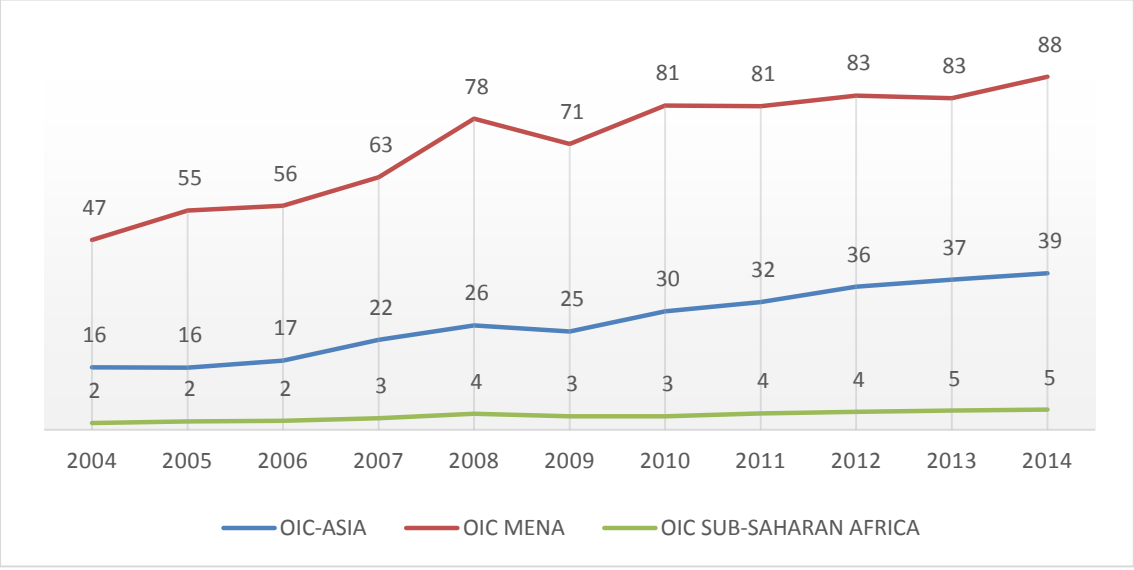


Source: UNWTO Tourism Highlights 2006, 2009 and 2015 Editions.

It can be seen that OIC-MENA has experienced growth, and the growth rate has increased last year according to available data. Figure 4.7 shows that OIC-Asia has experienced continued expansion in tourist arrivals for the period 2004-2014. The OIC- Sub Saharan Africa constitutes the smallest portion of the international OIC Tourism.

Similar analysis can be made for tourism receipts in these groups. Figure 4.8 shows that tourism receipts in OIC-MENA is greater than the other two regions.

Figure 4.8 Tourism Receipts in the OIC Regions



Source: UNWTO Tourism Highlights 2006, 2009 and 2015 Editions.

The Travel & Tourism Competitiveness Report 2015, which is published by World Economic Forum and covers a record 141 economies, aims to provide a comprehensive strategic tool for measuring the factors and policies that make it attractive to develop the T&T sector in different countries. Report uses four sub-indexes such as enabling environment; T&T policy and enabling conditions; infrastructure and T&T human, cultural, and natural resources.

There are four key findings emerged from the results of the Travel & Tourism Competitiveness Report 2015. First, the T&T industry continues to grow quickly, and has proven resilient to shocks. Second, new trends are emerging, and the countries performing better in the Travel & Tourism Competitiveness Index (TTCI) are those that are better equipped to capture the opportunities they bring. Third, developing the T&T sector provides growth opportunities for all countries, regardless of their wealth, and offers job opportunities at all skill levels. And finally, the development of the T&T industry is complex, requiring inter-ministerial coordination, and often international and public-private partnerships.

According to the results of this report, it is realized that there are only four Member Countries in first 50 countries which are ranked according to their competitiveness in travel and tourism sector. Table 4.1 states that United Arab Emirates has the highest rank with 24th score of 4,86 over 5 among the OIC Member Countries. Most of the Members do not have enough competitive advantage for tourism sector (see Appendix-Table 4). Therefore, this result highlights the fact that T&T competitiveness should be improved in the OIC Member Countries.

Table 4.2 The T&T Competitiveness Index 2015 Results for Top-5 Member Countries

Economy	Rank	Score	Change since 2013
United Arab Emirates	24	4,43	4
Malaysia	25	4,41	9
Qatar	43	4,09	-2
Turkey	44	4,08	2
Indonesia	50	4,04	

Source: WEF, 2015

The T&T Competitiveness Report 2015 gives details for these 5 countries as:

United Arab Emirates (UAE), which is ranked as 24th in the Report, showed four places up improvement since the year 2013. Report states that UAE has higher competitive advantage mostly due to the air transport infrastructure and its world-class international hubs for global air travel. Although the UAE is not endowed with rich natural resources (95th), it has built a cultural resource base, attracting both leisure and business travelers, with several and growing international fairs and exhibitions and increasingly diverse creative industries (WEF, 2015). From Expo 2020 Dubai to the construction of the Louvre and Guggenheim, the UAE is investing in and giving significant importance to the development of the T&T industry. This is supported by its world-renowned air transport infrastructure (3rd) and positioning as a gateway for Europeans to Africa, the Middle East and Asia. It has created extremely effective branding campaigns (1st) and an enabling business environment for the industry's development, with strides in travel facilitation and the liberalization of its visa regime (30th). The country has a safe and secure environment, but improvements could be made in terms of health and hygiene

services (69th), and some aspects of price competitiveness should be monitored as the cost of living is growing (103rd).

Malaysia is ranked as 25th in the report up nine position since the 2013-Report. Malaysia benefits from its rich cultural resources (ranked 27st) and suitable business environment. In addition to these, excellent price competitiveness with comparatively low fuel prices, low ticket taxes and airport charges, competitive hotel prices, and a favorable tax regime increases the competitiveness of Malaysia in tourism sector (WEF, 2015).

Qatar is ranked as 43th in the report down two places since the year 2013. Qatar benefits from a safe and secure environment (ranked 2nd), good business environment (ranked 3rd), ICT and tourism infrastructures, and excellent air transport infrastructure, in line with its role as an air transportation hub. Report states that the ease of hiring foreign labor, increasing enrolment rates, and the quality of its education increase the ability of the country to find high-quality human resources inside and outside the country (WEF, 2015).

Turkey climbs two positions this year to reach 44th place since the Report 2013. Turkey benefits from its rich cultural resources, with 20 World Heritage cultural sites, several international fairs and exhibitions, and strong creative industries. In addition, Turkey gains significantly in a number of areas and has seen a significant increase in tourist arrivals over the last years. Air transport infrastructure (16th) also supports travel and tourism industry in Turkey. Turkey is affected negatively form Gezi Parks protests and some political protests resulting with lower safety and security index and ranked as 121th in the report (WEF, 2015).

Indonesia ranks 50th overall while its growing tourism industry reaching over 8.8 million international visitors in 2014 thanks to national prioritization of the industry (15th) and continued investment in infrastructure—the mobile network now covers all areas of the country, air transport infrastructure has been expanded to reach 39th position with ground transport at 77th. These developments support Indonesia's main competitive advantages: price competitiveness (3rd) and rich natural resources (19th), including biodiversity (ranking 4th on the Total known species indicator) and several heritage sites (10th).

Bahrain is ranked as 60th overall and showed a downturn with 5 positions since 2013. The country benefits from good transport infrastructure, particularly ground transport infrastructure (ranked 11th); enabling good business environment (ranked 11th); and strong price competitiveness (18th) (WEF, 2015).

Morocco is ranked 62nd overall and 4th in the region. Tourism is considered a strategic industry for the country (26th in the prioritization ranking) and has been developed considerably, representing today almost 8% of employment, the highest share in the region. Tourists are attracted to Morocco's cultural resources (39th) and some natural resource hot spots, including popular beach resorts, while the industry benefits from a relatively safe setting (37th) and a business environment where FDI is welcome (10th) and construction procedures are not burdensome (28th). The country's infrastructure also plays a significant role, though air and ground transport have room for improvement.

Saudi Arabia places 5th regionally and 64th out of all countries in the TTCI, distinguishing itself through its enabling business environment (23rd) and price competitiveness (11th). Its

significant amount of international visitors travel mainly for business or religious tourism; however, it remains generally closed as a destination for leisure tourism, as exemplified by its government's low emphasis in prioritizing the T&T industry (100th) and international openness (138th). Its stringent visa restrictions (140th) apply also for the Hajj pilgrimage, though there have been recent policy changes to encourage foreign tourists to visit historical sites (the country scores relatively well, 55th, for cultural resources).

Egypt is 83rd in the global ranking and 10th in the region, with approximately 9 million tourists per year— below the country's full potential as a price-competitive destination (2nd), with significant investments in the T&T industry (23rd). Egypt's outstanding cultural resources (41st) and long history are perhaps under-leveraged, as reflected in a surprisingly low rank (60th) for oral and intangible heritage.

These analyses require policy attention and give ideas to governments to respond some areas which should be improved to increase competitiveness in the Member Countries. Developing regional cooperation on visa policies could further boost tourism, though investments are also needed in digital connectivity, infrastructure and protection of rich but depleting natural capital.

5 Importance of ICT Usage in Tourism Sector for the OIC Member Countries[1]

The internet has dramatically changed both the demand and supply side of the international tourism market. On the one hand, it has changed the way in which consumers plan and buy their holidays as travel information search and booking remain on top of the most popular activities conducted online. On the other hand, it has also affected how tourism providers design, promote and sell their products and services.

ICT touches all aspects of the tourism sector. These can be specified as selecting & developing tourism sites (Geospatial Information Technologies), Marketing (Inbound- market research & Outbound- advertising, promotions etc.), Customer Relationship Management, operations (buying, managing services and supplies) and managing& monitoring.

Information and Communications Technologies (ICT) developments have progressively changed tourism value chains and the position of SMEs within them. These same developments coupled with an increased uptake and use of the Internet have enabled business models to evolve, offering new ways for SMEs to collaborate and network with potential partners (e.g. to present comprehensive experiences to customers) (OECD, 2008b).

Tourists are gradually adapting to the new values, lifestyles and new tourism products. In future, tourism demand is expected to shift from mass tourism to more tailor-made tourism for individual travelers. This will further impact the online marketing strategies of tourism companies particularly tourism SMEs. The growing importance of social media and digital technologies on tourism has required a major shift in the approach to marketing and promotion by SMEs as they move away from traditional forms of print and media advertising to embrace these platforms. UNWTO (2001) also indicated that electronic business offers SMEs the opportunity to undertake their business in new and more cost-effective ways.

Younger travelers rely especially heavily on new technologies and online services to shape their travel "experience" but it is a fact that the internet is increasingly important for all kinds of travelers. A recent study by Boston Consulting Group estimates that 95% of people use digital resources to organize a trip, using an average of 19 websites or mobile applications—not only for booking, but also searching for information and inspiration, making plans and sharing experiences during and after the trip. Internet access during a trip is increasingly seen as a necessity: a Tripadvisor survey found that 74% of the respondents mentioned "free wi-fi" as the main benefit when deciding about accommodation.

For tourism businesses, the internet offers the potential to make information and booking facilities available to large number of tourists at relatively low costs. On the one hand, this structure has changed the way in which consumers plan and buy their holidays as travel information search and booking remain on top of the most popular activities conducted online. On the other hand, it has also affected how tourism providers design, promote and sell their products and services. According to the UNWTO, the Internet is revolutionizing the

[1] The 6th Meeting of the COMCEC Tourism Working Group will be held with the theme of "Effective Tourism Marketing Strategies: ICT-Based Solutions for The OIC Member Countries." Thus, the Tourism Outlook 2015 includes this section as an introductory section for the meeting.

distribution of tourism information and sales. An increasing proportion of Internet users are buying on–line and tourism will gain a larger and larger share of the online commerce market.

Opportunities for tourism SMEs to move up the value chain, resulting from ICT developments and changing customer preferences, also present a range of challenges. SMEs often have to take up more complex tasks in their business (e.g. marketing and communication), while the horizontal integration necessary to deliver a comprehensive customer experience through collaboration requires communication, networking, and partnership management skills. However, for many SMEs in the tourism sector, collaboration is not yet anchored in their business culture.

In the OIC Member States, it is needed to boost participation of tourism SMEs in the digital value chain by helping them to gain the right skills for operating on online market place and interconnect with all relevant market players via big distribution networks at affordable rates. Governments need to give importance to the ICT channel in their countries by:

- improving ICT adoption by tourism SMEs in their business interactions
- improving their competitiveness by enhancing business relationships between source markets and destinations
- facilitating the involvement of SMEs in the global digital value chain through the development of simple, low-cost and easy solutions

ICT usage in tourism also contributes to the competitiveness of the country in tourism industry. It can be realized that the best performers are attracting tourists with online marketing strategies and country-level branding, and offering customer care services beyond online booking. This requires management awareness and developing skills from technical and programming knowledge to data interpretation, to understand and meet consumers' evolving needs.

In WEF's The Travel & Tourism Competitiveness Report 2015, "ICT Readiness" index is calculated with 8 indicators. Performances of OIC Member States on ICT readiness is listed in Table 5.1.

Table 5.1 T&T Competitiveness Index 2015 Results for ICT Readiness

Economy	Rank	Score
Bahrain	15	5,76
United Arab Emirates	16	5,76
Qatar	25	5,44
Saudi Arabia	28	5,29
Kuwait	39	5,01
Oman	45	4,83
Kazakhstan	48	4,74
Azerbaijan	52	4,58
Malaysia	54	4,52
Jordan	65	4,17
Turkey	68	4,17
Albania	73	4,07

Morocco	75	4,03
Tunisia	76	3,94
Egypt	80	3,80
Suriname	81	3,78
Indonesia	85	3,73
Lebanon	88	3,62
Iran	98	3,36
Kyrgyz Republic	99	3,34
Algeria	105	3,09
Guyana	108	3,04
Senegal	109	3,02
Cote d'Ivoire	111	2,94
Nigeria	116	2,81
Gambia	117	2,74
Uganda	118	2,72
Bangladesh	119	2,70
Pakistan	121	2,54
Yemen	128	2,29
Mali	129	2,28
Tajikistan	130	2,22
Mauritania	131	2,18
Sierra Leone	132	1,98
Guinea	133	1,94
Mozambique	134	1,94
Cameroon	136	1,89
Burkina Faso	139	1,75
Chad	141	1,31

Source: World Economic Forum, The Travel & Tourism Competitiveness Report 2015

According to the results of the report, it is realized that there are only seven Member Countries in first 50 countries which are ranked according to their ICT readiness index scores. Table 5.1 states that Bahrain has the highest rank with 15th score of 5.76 among the OIC Member Countries. As it can be seen, most of the Members do not have enough competitive advantage in ICT readiness for tourism sector.

In this respect, Member States need to facilitate and accelerate the digital connection between smaller local service providers in the broader tourism industry (hospitality, tourism, culture and leisure) and larger travel agents, tour operators and distributors. This will encourage them to work more closely with larger travel agents and allow tourism enterprises to respond better and more quickly to the evolving market and to become more competitive through greater awareness and understanding of developments in new technologies.

Developments in ICT infrastructure will made the countries more visible and more integrated with the international tourism market. It is crucial for the developing countries to design efficient ICT mechanisms to compete with international tourism market. However, it is found that developing countries are unable to adopt ICT despite the competitive advantage of such applications (Shanker D, 2008). For most of the OIC Member countries, which are mostly

developing countries, it is a challenge to boost participation of tourism SMEs in the digital value chain. It is crucial to help tourism SMEs to gain the right skills for operating on online market place and interconnect with all relevant market players via big distribution networks. It is a fact that spreading the ICT awareness in tourism sector and increasing adoption and usage of ICT tools for marketing is a shortcoming for the OIC Member States.

6 Importance of Tourism Cooperation in the Member Countries

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

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

It is known that both established and new destinations need to shape the adequate conditions and policies with regard to:

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

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

Figure 6.1 Tourism Opportunities in the Member Countries

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

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

There are many challenges faced by the Member Countries for developing their tourism sector and making it internationally competitive. Challenges faced in the tourism development are diverse as each country has its own tourism features, level of development and national development priorities and policies. The challenges affecting tourism performance in the

Member Countries ranges from, among others, insufficient tourism-related infrastructure and investments, unskilled tourism workforce to low-capacity tourism administrations and lack of safety and security (COMCEC Progress Report, 2013), as shown in Figure 6.2.

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

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

Figure 6.2 Challenges Affecting Tourism Performance in the Member Countries

Insufficient Tourism Investments and Infrastructures

Poor Tourism Planning & Product Development

Travel Facilitation Problems

Safety and Security Related Problems

Low Tourism Service Quality

Insufficient Marketing and Promotion

Insufficient Image Building and Branding

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

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

The absence or weak publicity promotion and mass media exposure due to the limited communication systems and technological services are also obstacles for tourism development in the OIC Member Countries. It is known that electronic media (CD-ROM maps, Internet, web sites, etc.) will be increasingly used for the purpose of choosing destinations and making

reservations. Therefore, the COMCEC countries should improve their promotion through electronic media and other mass media.

6.2 Tourism Cooperation under the COMCEC Umbrella

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

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

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

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

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

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

Figure 6.3 Output Areas in the Tourism Section of the COMCEC Strategy

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

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

In this framework, the 1st Meeting of the COMCEC Tourism Working Group was held on April 25th, 2013 in Ankara, Turkey with the theme of *"A New Trend in Sustainable Tourism Development: Community Based Tourism in the OIC Member Countries."* The Meeting was attended by the representatives of 15 Member States, which have notified their focal points for the Tourism Working Group. The relevant OIC institutions and some academicians have also attended the Meeting. The representatives of the Member States have shared their experiences, achievements and challenges in implementing the Community-Based Tourism (CBT) Programs in their respective countries. The Meeting has considered the Studies namely "Community Based Tourism: Finding the Equilibrium in the COMCEC Context" commissioned by the COMCEC Coordination Office and the "Tourism Outlook 2013" prepared by the COMCEC Coordination Office. The outcomes of the Meeting were published by the COMCEC Coordination Office with the document titled the "Proceedings of the 1st Meeting of the Tourism Working Group", available on the COMCEC website (www.comcec.org).

The 2nd Meeting of the COMCEC Tourism Working Group was held on October 3rd, 2013 in Ankara, Turkey with the theme of *"Tourism Product Development and Marketing Strategies in the* OIC Member Countries." The Meeting was attended by the representatives of 11 Member States, which have notified their focal points for the Tourism Working Group and representatives of the COMCEC Coordination Office, SESRIC and Islamic Center for Development of Trade (ICDT) and some private sector representatives. The COMCEC Tourism Outlook and an analytical study namely "Tourism Product Development and Marketing Strategies" have been prepared and submitted to the Meeting. The representatives of the Member States have shared their experiences, achievements and challenges in tourism product

development and marketing strategies in their respective countries as well as explore cooperation potential among each other. The Meeting highlighted that tourism product development and marketing requires effective collaboration among different stakeholders. It was stressed that because of its competitive nature, effective marketing requires utilization of the full range of tools available including among others PR activities, e-marketing, social media, etc. Some recommendations have been made for enhancing cooperation among the Member Countries in the field of product development and marketing. These were, among others, introducing award programmes, conducting joint exhibitions, developing joint tourism products, organizing exchange programs for experts and developing joint data base for tourism products among the Member Countries. Moreover, Proceedings of the Second Meeting of the Tourism Working Group, which reflects the outcomes of the Meeting was prepared and published on the COMCEC Website (www.comcec.org).

The 3rd Meeting of the COMCEC Tourism Working Group was held on March 4th, 2014 in Ankara, Turkey with the theme of "Enabling Tourism Investment Climate in the OIC Member Countries." The Meeting was attended by the representatives of 14 Member States, which have notified their focal points for the Tourism Working Group and representatives of SESRIC, Islamic Center for Development of Trade (ICDT), International Finance Corporation (IFC) and representatives from private sector. The Representatives of the Member States have shared their experiences, achievements and challenges regarding tourism investments in their respective countries. Moreover, the Studies titled "Enabling Tourism Investment Climate: Challenges and Prospects for Tourism Investments in the OIC Member Countries" commissioned by the COMCEC Coordination Office and the "COMCEC Tourism Outlook 2014" prepared by the COMCEC Coordination Office were the main inputs for enriching the discussions during the Meeting. The presentations and deliberations made during the meeting highlighted that governments play a crucial role for creating an enabling investment climate for tourism investors. It was stressed that creating an enabling tourism investment climate requires utilization of the full range of tools and strategies including among others, provision of clear, updated information and prompt responses to investor inquiries, updated investment promotion websites, effective coordination among relevant stakeholders, providing infrastructure (including road networks, electricity, etc.), allocation of land for specific tourism projects, effective incentive packages, easy procedures and financial support for the local tourism SMEs as well as foreign entrepreneurs and utilization of alternative investment financing options such as crowdfunding.

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

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

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

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

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

Similarly, the policy recommendations of the 5th Meeting of the Tourism Working Group will be submitted to the 31st Session of the COMCEC to be held on 23-26 November 2015 in İstanbul.

Another instrument envisaged by the COMCEC Strategy that will strengthen tourism cooperation among member states is the COMCEC Project Funding. The Strategy has a viable funding mechanism through which member countries registered to the Tourism Working Group submit projects to be financed through grants by the COMCEC Coordination Office. The first project call was made in September 2013. Within the framework of the 1st project call under the COMCEC Project Funding, 2 projects in tourism sector were successfully implemented in 2014. One of them was "Cities of Common Cultural Heritage" project implemented by Azerbaijan Ministry of Culture and Tourism. There were 3 partner countries namely; Turkey, Uzbekistan and Kazakhstan in this project. The project aimed at creating a joint cultural tourism product and at the end of the project with the help of the analytical study prepared as an outcome of the project, cultural heritage routes were created. The other project was "Improving Statistical Capacities of Tourism Sector in COMCEC Mediterranean and Gulf Region" proposed by SESRIC. The project covered 6 member countries namely; United Arab Emirates, Jordan, Tunisia, Albania, Qatar, Oman. This project aimed at improving statistical capacities of the member countries in tourism field and entailed 8 training programs and one workshop in this respect.

The second project call under the PCM was made in September 2014 and 2 projects of the Member Countries in tourism sector are announced as final-listed. One of them is Azerbaijan's project on "Promotion of the Cities of Common Cultural Heritage." This project covers four Member Countries namely, Uzbekistan, Turkey and Kazakhstan as well as Azerbaijan. The Common Cultural Heritage Routes from the first project of Azerbaijan will be promoted by conducting site visits with tourism agents in aforementioned countries and by giving seminars in those countries regarding cultural heritage product. Gambia's project entails Senegal and Guinea Bissau and contains ecovillage design education courses regarding community based tourism. At the end of the project a report regarding ecovillage design education will be published. The implementation process for these projects has started as of April 2015.

7 Conclusion

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

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

According to the UNWTO statistics, 1.135 million international tourists travelled in 2014 with an average annual increase of over 4% since the year 2000. Tourism sector which already accounts for 9 percent of World GDP is one of the pillars that should be supported by governments around the world as part of the policies for stimulating economic growth.

From the period 1980 to 2014, international tourism receipts —which are the export value of tourism, including international passenger transport—increased from US$125 billion in 1980 to US$ 1,245 billion in 2014 (UNWTO, 2015) denoting a solid increase in four decades. In real terms, this corresponds to an average growth of 4 percent a year, which has almost the same pace as tourist arrivals.

The sector faces challenges every year and 2015 is likely to be no different. The weakness and potential volatility of many currencies against the US dollar and a deep recession in Russia, a key outbound market, will slow outbound spending in line with slower world trade overall in 2015. However, falling oil prices will bring significant improvements for net oil importers in 2015, increasing disposable household incomes and domestic consumer spending, and lowering air fares. As a result, the growth in tourism sector will continue at a stronger rate than last year, with the total contribution to GDP expected to increase by 3-4%. This growth will require OIC Member Countries to adopt a concerted and coordinated approach to planning and development between their industry, governments and educational institutions to ensure that they fulfill their potential in the years ahead.

In view of the modest share of the OIC Member Countries in international tourism market, it is evident that the inherent potential has not yet been fully realized and manifested itself in desirable levels. OIC Member States need to understand how they can strengthen the position of their tourism economies in response to current global economic challenges and remain competitive with emerging destinations, within a sustainable development context.

As in the case of OIC tourist arrivals, tourism receipts in the Member Countries are concentrated in a small number of countries, almost the same countries of the main OIC tourist destinations.

The share of international tourism receipts in the total exports of each member country indicates that tourism plays a significant role in the economies of member countries and constitutes an important source of foreign exchange earnings.

According to the results of the Travel & Tourism Competitiveness Report 2015, there are only five Member Countries in first 50 countries which are ranked according to their competitiveness in travel and tourism sector. This means that member countries should attach a special importance to competitiveness in designing their tourism policies.

By the groupings in the OIC Member Countries, it is observed that OIC-MENA has experienced expansion in tourist arrivals for the period 2004-2014. In the same period, OIC-ASIA has experienced growth in tourist arrivals. OIC- Sub Saharan Africa constitutes the smallest portion of the international OIC Tourism. In terms of tourism receipts, OIC-MENA's performance has been greater than OIC- Sub Saharan Africa and OIC-Asia in the period 2004-2014.

Obstacles faced in the tourism development are diverse in the Member Countries as each country has its own tourism features, level of development and national development priorities and policies. The challenges affecting tourism performance in the Member Countries ranges from, among others, insufficient tourism-related infrastructure and investments, unskilled tourism workforce to low-capacity tourism administrations and problems in safety and security.

It is evident that if properly planned and managed tourism cooperation could play a significant role in the socio-economic development of the Member Countries. The COMCEC Strategy, provides a useful strategic framework for tourism development and tourism cooperation in the Member Countries with its new implementation instruments, namely, Tourism Working Group and Project Cycle Management mechanism.

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

APPENDIX:

Table 1: Tourist Arrivals in the OIC Member Countries (2003-2014)

Tourist Arrivals (000)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
World (Millions)	**689**	**760**	**805**	**851**	**911**	**929**	**894**	**952**	**995**	**1.038**	**1.087**	**1.135**
Afghanistan												
Albania	557	645	748	937	1.127	1.420	1.792	2.417	2.932	3.156	2.857	-
Algeria	1.166	1.234	1.443	1.638	1.743	1.772	1.912	2.070	2.395	2.634	2.733	-
Azerbaijan	768	989	693	682	732	1.043	1.005	1.963	2.239	1.986	2.130	2.160
Bahrain	-	-	1237	-	-	-	-	955	-	1.014	1.069	-
Bangladesh	245	271	208	200	289	467	267	303	-	125	148	-
Benin	175	174	176	180	186	188	190	199	209	220	231	-
Brunei Darussalam	0	119	126	158	179	226	157	214	242	209	225	-
Burkina Faso	163	222	245	264	289	272	269	274	238	237	218	-
Cameroon	0	190	176	185	262	298	498	573	604	812	912	-
Chad	21	26	29	16	25	22	70	71	77	86	100	-
Comoros	21	23	26	29	15	-	11	15	19	-	-	-
Cote d'Ivoire	180	-	-	-	-	-	-	252	270	289	380	471
Djibouti	23	26	30	40	40	53	-	51	-	60	63	-
Egypt	5.746	7.795	8.244	8.646	10.610	12.296	11.914	14.051	9.497	11.196	9.174	9.628
Gabon	222	244	269	296	325	358	186	-	-	-	-	
Gambia	89	90	108	125	143	147	142	91	106	157	171	-
Guinea	44	45	45	46	30	-	-	12	-	96	56	-
Guinea-Bissau	0	0	5	12	30	-	-	-	-	-	-	-
Guyana	101	122	117	113	134	130	141	150	157	177	200	206
Indonesia	4.467	5.321	5.002	4.871	5.506	6.234	6.324	7.003	7.650	8.044	8.802	9.435
Iran	1.546	1.659	1.889	2.735	2.172	2.034	-	2.938	3.354	3.834	4.769	-
Iraq	-	-	-	-	-	864	1.262	1.518	-	1111	892	-
Jordan	2.353	2.853	2.987	3.225	3.431	3.729	3.789	4.207	3.960	4.162	3.945	3.990
Kazakhstan	2.410	3.073	3.143	3.468	3.876	3.447	3.118	3.393	4.093	4.807	4.926	4.560
Kuwait	94	91	104	185	293	259	297	207	269	300	307	-
Kyrgyz Republic	342	398	319	766	1.656	2.435	2.147	1.316	3.114	2.406	3.076	2.849
Lebanon	1.016	1.278	1.140	1.063	1.017	1.333	1.844	2.168	1.655	1.366	1.274	1.355
Libya	0	43	81	42	38	34	-	-	-	-	-	-
Malaysia	10.577	15.703	16.431	17.547	20.973	22.052	23.646	24.577	24.714	25.033	25.715	27.437
Maldives	564	617	395	602	676	683	65	792	931	958	1.125	1.205
Mali	110	113	143	153	164	190	160	169	160	134	142	-
Mauritania	-	-	-	-	-	-	-	-	-	-	-	-
Morocco	4.761	5.477	5.843	6.558	7.408	7.879	8.341	9.288	9.342	9.375	10.046	10.282
Mozambique	441	470	578	664	771	1.815	1.461	1.718	1.902	2.113	1.886	-
Niger	55	57	58	60	48	73	66	74	82	94	123	-
Nigeria	924	962	1.010	1.111	1.212	1.313	1.414	1.555	715	486	600	-
Oman	630	908	1.114	1.336	1.182	1.378	1.524	1.446	1.343	1.438	1.551	-
Pakistan	501	648	798	898	840	823	855	907	1.161	966	-	-
Palestine	37	56	88	123	264	387	396	522	449	490	545	555
Qatar	557	732	913	946	964	1.405	1.659	1.519	2.527	2.346	2.611	2.826
Saudi Arabia	7.332	8.599	8.037	8.620	11.531	14.757	10.897	10.850	17.498	14.276	13.380	15.098
Senegal	495	667	769	866	875		810	900	1.001	962	1.063	-
Sierra Leone	38	44	40	34	32	36	37	39	52	60	81	44
Somalia	-	-	-	-	-	-	-	-	-	-	-	-
Sudan	52	61	246	328	436	440	420	495	536	575	591	-
Suriname	82	138	161	154	167	151	150	204	220	240	249	246
Syria	2.598	3.399	3.571	4.231	4.158	5.430	6.092	8.546	5.070	-	-	
Tajikistan	-	-	-	-	-	325	-	-	-	-	-	-
Togo	61	83	81	94	86	74	150	202	300	235	327	-
Tunisia	5.114	5.998	6.378	6.550	6.762	7.050	6.901	6.902	4.782	5.950	6.269	6.069
Turkey		16826	20273	18916	22248	24994	25506	31.364	34.654	35.698	37.795	39.811
Turkmenistan	8	15	12	6	8	-	-	-	-	-	-	-
Uganda	305	512	468	539	642	844	807	946	1.151	1.197	1.206	-
UAE (Dubai)	5.871	6.195	7.126	-	-	-	6.812	7.432	8.129	8.977	9.990	-
Uzbekistan	231	262	242	560	903	1.069	1.298	1.327	1.460	-	1.969	-
Yemen	155	274	336	382	379	404	434	1.025	829	874	990	-

Source: UNWTO Tourism Highlights 2006, 2009 and 2015 Editions.

Table 2: Tourism Receipts in the OIC Member Countries (2003-2014) (US $ Millions)

Tourism Receipts	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
World (US $ Billion)	**533**	**634**	**679**	**744**	**858**	**941**	**853**	**928**	**1.030**	**1.075**	**1.197**	**1.245**
Afghanistan	-	-	-	-	-	-	-	55	71	56	56	-
Albania	537	756	880	1.057	1.479	1.849	1.816	1.626	1.628	1.464	1.473	1.705
Algeria	112	178	477	215	219	474	267	219	209	217	350	-
Azerbaijan	70	79	100	201	317	382	353	621	1287	2433	2365	2432
Bahrain	1.206	864	1.603	1.048	1.105	1.166	1.118	1.362	1.035	1.051	1.165	-
Bangladesh	59	76	79	80	76	75	70	81	87	105	128	-
Benin	108	121	108	122	206	236	131	133	187	170	189	-
Brunei Darussalam	124	181	191	224	233	242	254	-	-	92	-	-
Burkina Faso	38	52	46	55	61	82	64	72	133	84	153	-
Cameroon	266	212	229	231	254	167	270	159	409	349	576	-
Chad	-	-	-	-	-	-	-	-	-	-	-	-
Comoros	16	21	24	27	30	39	32	35	44	39	-	-
Cote d'Ivoire	76	91	93	104	115	129	151	201	141	-	-	-
Djibouti	7	7	7	10	7	8	16	18	19	21	22	-
Egypt	4.704	6.125	6.851	7.591	9.303	10.985	10.755	12.528	8.707	9.940	6.047	7.208
Gabon	84	74	13	-	-	-	-	-	-	-	-	-
Gambia	58	51	59	69	87	80	63	74	83	88	-	-
Guinea	-	-	-	-	1	2	3	2	2	1	-	-
Guinea-Bissau	2	2	2	3	28	38	-	13	-	7	-	-
Guyana	28	27	35	37	50	59	35	80	95	64	77	-
Indonesia	4.461	4.798	4.521	4.448	5.346	7.375	5.598	6.957	7.952	8.325	9.119	9.848
Iran	1.266	1.074	1.025	1.452	1.486	2.202	2.012	2.438	2.381	1.114	1.294	-
Iraq	-	-	186	170	555	-	-	1.660	1.543	1.634	-	-
Jordan	1.266	1.330	1.441	2.060	2.311	2.943	2.911	3.585	3.425	4.061	4.117	4.375
Kazakhstan	638	803	801	838	1.013	1.012	963	1.005	1.209	1.347	1.344	1.321
Kuwait	328	398	413	508	530	610	354	290	319	425	298	369
Kyrgyz Republic	62	92	94	189	392	569	459	284	640	698	530	-
Lebanon	6.782	5.411	5.969	4.981	5.466	7.192	6.744	7.861	6.545	6.327	5.872	-
Libya	243	261	301	244	99	99	50	60	-	-	-	-
Malaysia	6.799	8.198	8.543	10.424	14.047	15.277	15.772	18.276	18.259	20.250	21.496	21.820
Maldives	402	471	287	512	602	664	608	1.713	1.868	1.951	2.333	2.661
Mali	136	142	149	175	227	286	192	283	267	142	178	-
Mauritania	-	-	-	-	-	-	-	-	-	48	41	
Morocco	3.802	3.924	4.617	5.984	7.181	7.202	6.557	6.703	7.281	6.703	6.854	7.055
Mozambique	106	96	138	145	182	213	196	197	231	250	241	-
Niger	28	32	44	39	44	86	66	105	96	50	58	-
Nigeria	58	49	139	209	337	959	602	576	628	559	543	543
Oman	546	414	481	544	648	804	689	780	996	1095	1222	-
Pakistan	620	765	828	255	276	245	272	305	373	339	288	283
Palestine	152	115	119	89	212	269	410	667	795	755	399	-
Qatar	369	498	760	874	-	-	179	584	1.170	2.857	3.456	4.591
Saudi Arabia	3.418	6.486	6.111	4.961	5.228	9.720	5.995	6.712	8.459	7.432	7.651	8.238
Senegal	269	286	334	250	531	637	463	453	468	407	-	-
Sierra Leone	60	58	64	23	22	34	25	26	44	42	59	32
Somalia	-	-	-	-	-	-	-	-	-	-	-	
Sudan	17	21	89	252	262	331	299	94	185	772	773	967
Suriname	18	52	96	109	73	83	64	61	61	71	84	95
Syria	877	2057	2130	2025	2883	3176	3757	6190	1753	-	-	
Tajikistan**	6	10	9	11	17	24	20	32	-	-	-	
Togo	26	25	27	23	38	44	68	66	79	111	-	-
Tunisia	1.935	1.970	2.063	2.275	2.575	2.932	2.773	2.645	1.914	2.227	2.191	2.342
Turkey		15888	18152	16853	18487	21951	21250	22585	25054	25653	27997	29552
Turkmenistan	-	-	-	-	-	-	-	-	-	-	-	
Uganda	185	268	382	346	398	498	667	784	960	1135	1180	1355
UAE	1.438	1.593	3.218	4.972	6.072	7.162	7.352	8.577	9.204	10.380	11.564	-
Uzbekistan	48	57	28	43	51	64	99	121	-	-	-	-
Yemen	139	139	181	181	425	453	486	1161	780	849	940	-

Source: UNWTO Tourism Highlights 2006, 2009 and 2015 Editions.

Table 3: The T&T Competitiveness Index 2015 for OIC Member Countries

ECONOMY	RANK 2015	SCORE	CHANGE SINCE 2013
United Arab Emirates	24	4.43	4
Malaysia	25	4.41	9
Qatar	43	4.09	-2
Turkey	44	4.08	2
Indonesia	50	4.04	20
Bahrain	60	3.85	-5
Morocco	62	.381	9
Saudi Arabia	64	3.80	-2
Oman	65	3.79	-8
Jordan	77	3.59	-17
Tunisia	79	3.54	n/a
Egypt	83	3.49	2
Azerbaijan	84	3.48	-6
Kazakhstan	85	3.48	3
Lebanon	94	3.35	-25
Iran	97	3.32	1
Suriname	101	3.28	-1
Kuwait	103	3.26	-2
Guyana	104	3.26	-1
Albania	106	3.22	-29
Gambia	109	3.20	-17
Senegal	112	3.14	-5
Uganda	114	3.11	2
Kyrgyz Republic	116	3.08	-5
Côte d'Ivoire	117	3.05	9
Tajikistan	119	3.03	-5
Cameroon	122	2.95	-1
Algeria	123	2.93	9
Pakistan	125	2.92	-3
Bangladesh	127	2.90	-4
Mali	128	2.87	1
Mozambique	130	2.81	-5
Nigeria	131	2.79	-4
Sierra Leone	132	2.77	5
Burkina Faso	136	2.67	-8
Mauritania	137	2.64	-3
Yemen	138	2.62	-5
Guinea	140	2.58	-4
Chad	141	2.43	n/a

Source: World Economic Forum, The Travel & Tourism Competitiveness Report 2015

Table 4: Classification of the OIC Member Countries by Region

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

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