



**COMCEC**

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

## **COMCEC TOURISM OUTLOOK 2017**



**COMCEC COORDINATION OFFICE  
August 2017**





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**COMCEC COORDINATION OFFICE  
August 2017**

For further information please contact:

COMCEC Coordination Office

Necatibey Caddesi No: 110/A

06100 Yüce-tepe

Ankara/TURKEY

Phone : 90 312 294 57 10

Fax : 90 312 294 57 77

Web : [www.comcec.org](http://www.comcec.org)

E-mail : [comcec@comcec.org](mailto:comcec@comcec.org)

## **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 2017 is prepared by Dr. Gurel CETIN, consultant at the COMCEC Coordination Office, with the objective of providing general information on the status of tourism in the Member States. It dwells on the major issues with regards to tourism sector development in the light of international tourism trends, provides insights on the current status of the OIC Member States and makes comparative analyses with the different country groupings to demonstrate the situation in the Member States and thus the cooperation potential.

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## Table of Contents

1	Introduction.....	1
2	The Importance of Tourism for Development .....	2
3	Overview of International Tourism in the World .....	5
3.1	Key Tourism Trends in the World .....	5
3.2	International Tourist Arrivals .....	9
3.3	International Tourism Receipts.....	12
4	International Tourism in the OIC Member Countries .....	16
5	Risk and Crises Management the OIC Member Countries .....	27
6	Importance of Tourism Cooperation in the Member Countries .....	31
6.1	Tourism Potentials & Obstacles Faced in the Tourism Development and Cooperation in the Member Countries .....	31
6.2	Tourism Cooperation under the COMCEC Umbrella.....	33
7	Conclusion.....	40
	APPENDIX: .....	42
	Table 1: Tourist Arrivals in the OIC Member Countries (2003-2016).....	42
	Table 2: Tourism Receipts in the OIC Member Countries (2003-2017) (US \$ Millions).....	43
	Table 3: Travel & Tourism Economic Impact for OIC Member Countries (2016 Data).....	44
	Table 4: Classification of the OIC Member Countries by Region .....	45
	REFERENCES: .....	46

## List of Tables

Table 3.1 International Tourism Arrivals and Tourism Receipts .....	10
Table 3.2 International Tourism Arrivals by Region (Millions) .....	11
Table 3.3 International Tourism Receipts by Region (Billion \$).....	14
Table 4.1 Estimates and Forecasts of Travel&Tourism Economic Impact in OIC Member States.....	16
Table 4.2 Member Countries by Major Surplus/Deficits on the Travel Balance in 2013-2015 (US\$ billion).....	25

## List of Figures

Figure 2.1 Why Tourism Matters? .....	3
Figure 3.1 Tourism Megatrends.....	7
Figure 3.2 Internet Information Sources.....	8
Figure 3.3 Change in International Tourist Arrivals (%) .....	11
Figure 3.4 Tourist Arrivals by Region (2000-2016).....	12
Figure 3.5 International Arrivals & Tourism Receipts (2005-2016).....	13
Figure 3.6 Tourism Receipts by Region (2000-2016) .....	14
Figure 4.1 The Direct Contribution of Travel & Tourism to Member Countries' GDP (%) (2016) .....	18
Figure 4.2 The Direct Contribution of Travel & Tourism to Total Employment (%) (2016) .....	19
Figure 4.3 Tourist Arrivals and Tourism Receipts in the OIC Member Countries .....	20
Figure 4.4 Tourist Arrivals in the OIC Sub-Regions (Millions).....	21
Figure 4.5 Tourism Receipts in the OIC Sub-Regions .....	22
Figure 4.6 Top 10 OIC Tourism Destinations in International Tourist Arrivals (Thousand) (2016) .....	23
Figure 4.7 Top 10 OIC Tourism Destinations in International Tourism Receipts in 2016 (Million US \$).....	23
Figure 5.1 Time to recover from crises (Months).....	28
Figure 5.2. Risk and Crises Management Actions at Different Stages .....	29
Figure 6.1 Tourism Opportunities in the Member Countries .....	32
Figure 6.2 Challenges Affecting Tourism Performance in the Member Countries .....	33
Figure 6.3 Output Areas in the Tourism Section of the COMCEC Strategy.....	35

## 1 Introduction

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

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

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

This 2017 Outlook aims to provide a brief account of the situation in the OIC Member Countries. In this respect, the major issues with regards to development of tourism industry in the light of international tourism trends, the current situation in the member countries and some comparisons regarding competitiveness of the OIC Member States were analyzed.

## 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, international trade and foreign direct investment.

Over the past decades, many new destinations have emerged, challenging the traditional ones in Europe and North America. For many developing countries, tourism is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development. The main positive economic impacts of tourism relate to foreign exchange earnings, contributions to government revenues, generation of employment and investment opportunities. Local recruitment and business opportunities in tourism help reduce rural-urban migration. While fostering gender equality, entry level jobs in tourism require less skilled workforce and this also enhances recruitment opportunities among younger generations.

Based on the information from countries with data available, the World Travel & Tourism Council (WTTC) estimated that travel & tourism's contribution directly to worldwide gross domestic product (GDP) was 3.1 % in 2016 and is expected to rise by 3.5% in 2017. The forecasted growth of tourism's contribution to GDP is around 3.9% on the average for the next ten years. This is much faster than the growth in global economy which was around 2.5% in 2016. With direct and indirect effects of more than 185 supply-side economic activities that have significant connections to tourism, its contribution to GDP is calculated as 10.2%, a total of US\$7.6 trillion, and is expected to grow by 3.6 to US\$7.9 trillion in 2017. It is also estimated that travel and tourism sector have attracted capital investment of US\$807 billion in 2016 (WTTC, 2017a).

Tourism provided 109 million direct (3.6% of total employment) and 183 million indirect and induced jobs with a total of 292 million (10% of total employment) jobs in 2016 and direct contribution to employment is expected to rise by 2.1% in 2017. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment industries, banking & finance, promotion and publicity services; tourism's contribution to employment tends to be much higher. In 2016, nearly 292 million jobs were supported in tourism related industries (WTTC, 2017a). Tourism's contribution is estimated as 9.6% of the overall number of jobs or one in 10 jobs globally (UNWTO, 2017a). According to the WTTC, travel & tourism will support 382 million jobs which indicates 11.1% of total employment by 2027 (WTTC, 2017a).

**Figure 2.1 Why Tourism Matters?**

Source: UNWTO, Tourism Highlights 2016 Edition.

According to the UNWTO, total exports earnings generated by international tourism in 2016 reached US\$ 1.4 trillion or US\$ 4 billion a day on average. International tourism represents 7% of the world's exports in goods and services, up from 6% in 2015, as tourism has grown faster than world trade over the past four years. Tourism exports account for as much as 30% of the world's exports of commercial services. Globally, tourism ranks third after fuels and chemicals and ahead of food and automotive products as an export category. However, in many emerging economies, tourism is the largest export category. While tourism represents 30% of services exports globally, the industry has 40% share in emerging economies' services exports (UNWTO, 2017a). Tourism is also important for export diversification; particularly for commodity and oil exporting countries tourism has the potential to offset weaker export revenues.

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

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

A cross country study by the IMF showed that an increase of one standard deviation in tourism activity would lead to an additional annual growth of about 0.5 percentage point per year, ceteris



paribus (everything else being constant) (IMF, 2009). Thus, particularly low income economies should view investing in its tourism industry as a means to stimulate growth over the long term and enabling the poor to share in economic gains.

### 3 Overview of International Tourism in the World

#### 3.1 Key Tourism Trends in the World

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

The share of emerging economies in the international tourism market is increasing. This increase will be slightly higher than the rate achieved in the period 1995-2010. For the decade 2010-2020, increases will be more moderate in the first years and pick up in the middle of the period, and they will gradually slowdown. Over time, the rate of growth is 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 wider across the globe and travel between regions will continue to grow slightly faster than travel within the same region. The share of emerging economies in the international tourism will surpass the share of advanced ones. Many of the new arrivals will be to destinations in Asia, Latin America, Central and Eastern Europe, Africa and the Middle East. The future brings enormous opportunities for tourism to take a central role in the political and economic agenda, seeking recognition for its contribution to economic growth and development. It also brings added challenges and responsibilities for tourism sector to take the lead in mitigating its potential negative impacts on host communities and the environment (Tourism Towards 2030, 2012).

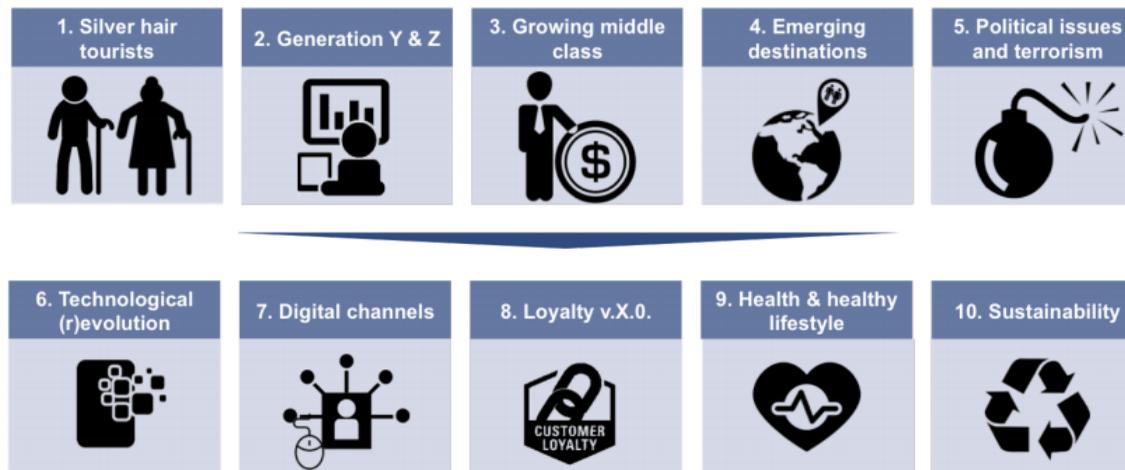
Over the past six decades tourism has experienced a continued growth not only in traditional destinations in Europe and North America but also in other parts of the world. According to Tourism Towards 2030; by 2030, 58% of international arrivals will be recorded in the emerging economy destinations of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

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

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

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

According to this report, global population is aging and as a result *silver hair tourists'* segment is emerging -- with specific desires and needs in terms of customization, service consumption, security and desired products. The share of world's population over the age of 60 increased from 8% in 1950 to 12% in 2013. According to forecasts, this segment's share will reach 21% by 2050. Silver hair tourists are an important tourist segment and are expected to spend more than all other age groups on travels with a satisfactory disposable income, less home responsibilities and empty nests, more time to travel and relatively good health. They require tailor-made services and prefer to build trust through face-to-face interaction with providers. They also have different preferences and interests, expectations and needs, and their focus is often based on special interest. Health and wellness travel is popular among silver hair tourists (Horwart HTL,2015).

**Figure 3.1 Tourism Megatrends**

**Source:** Horwath HTL, 2015

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

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

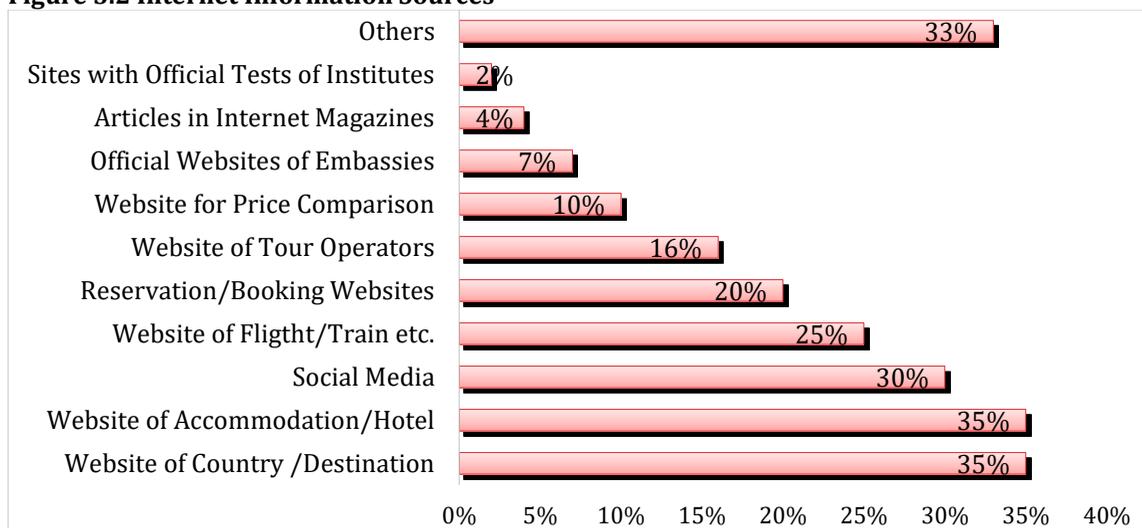
The weight of emerging destinations in the international tourism market is increasing. According to UNWTO; by 2030, 57% of international arrivals will be to the emerging destinations.

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

all tourism stakeholders. Five-point crisis communications plan should cover clear information, consistency, openness and accessibility and sympathy for victims. Governments and authorities should also ensure clear and effective communications (ITB, 2015).

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

**Figure 3.2 Internet Information Sources**



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

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

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

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

The sharing economy has shown incremental growth in recent years and is forecast to reach USD 335 billion by 2025, according to projections by PricewaterhouseCoopers. Tourism is one of the sectors that much of this growth occurred, as the fast paced growth of peer-to-peer and shared usage platforms is changing the tourism marketplace and giving people new options for where to stay, what to do and how to get around. Sharing economy platforms have adopted

different business models, some of which closely resemble traditional tourism activities, while others appeal to users' sense of community (OECD, 2016).

This rapid growth of the sharing economy is placing pressure on existing tourism policy frameworks. This requires a balanced, informed approach, which considers all interests. Tourist protection, safety and quality assurance frameworks are important factors to translate to the sharing economy model. Taxing and regulation and impact on residents are other challenges to be dealt by legislative bodies. Governments should make sure that they capture the opportunity to stimulate innovation and support the development of tourism, while addressing the challenges it poses for the traditional tourism sector and the impacts on society (OECD, 2016). Governments are recommended to modernize policy and regulatory approaches, re-think policy incentives, better understand the policy environment and test new approaches, utilize the data, strengthen data collection and research on the impacts of the sharing economy on tourism and local communities (OECD, 2016). Increased local planning, management and marketing of destination and regional leadership and institutionalization in tourism through DMOs at destination level also emerge as a necessity (Edgell, 2015).

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

### **3.2 International Tourist Arrivals**

According to the UNWTO (2017a), international tourist arrivals grew 3.9% in 2016, equivalent to 46 million more arrivals and reached to 1.235 million tourists. Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 529 million in 1995 and 1.235 million in 2016 (UNWTO, 2017a). 2016 was the seventh consecutive year of above-average growth in international tourism following the 2009 global economic crisis. Despite ongoing geopolitical, economic and environmental challenges in various regions of the world, demand continued to be strong in most of the destinations.

Tourism flows were influenced by three major factors in 2015 and 2016. These were fluctuations in exchange rates, decline in the price of oil and other commodities which increased disposable income in importing countries but weakened demand in exporting countries and increased global concern about safety and security in some destinations (UNWTO, 2017a).

Growth is expected to continue in 2017 according to the 2016 level and will be above the UNWTO's long term projections (for 2030: +3.8% a year on average between 2010 and 2020). International tourist arrivals grew by 6% between January and April 2017, meaning of 21 million more arrivals compared to same period of last year. UNWTO forecasts international tourist arrivals to increase by 3% to 4% over the full year 2017 (UNWTO, 2017b). Arrivals to Europe is expected to rise by 2-3%, Asia and the Pacific by 5-6%, Americas by 4-5%, Africa by 5-6% and Middle East by 2-5% in 2017.

**Table 3.1 International Tourism Arrivals and Tourism Receipts**

	2000	2005	2010	2014	2015	2016
Number of tourists (millions of people)	674	809	953	1.137	1.189	1.235
Annual change (percent)	8,1	5,9	6,5	4,0	4,5	3,9
Tourism receipts (billion dollars)	495	701	961	1.252	1.196	1220
Annual change (percent)	-	-	11,7	4,6	-4,5	2.0

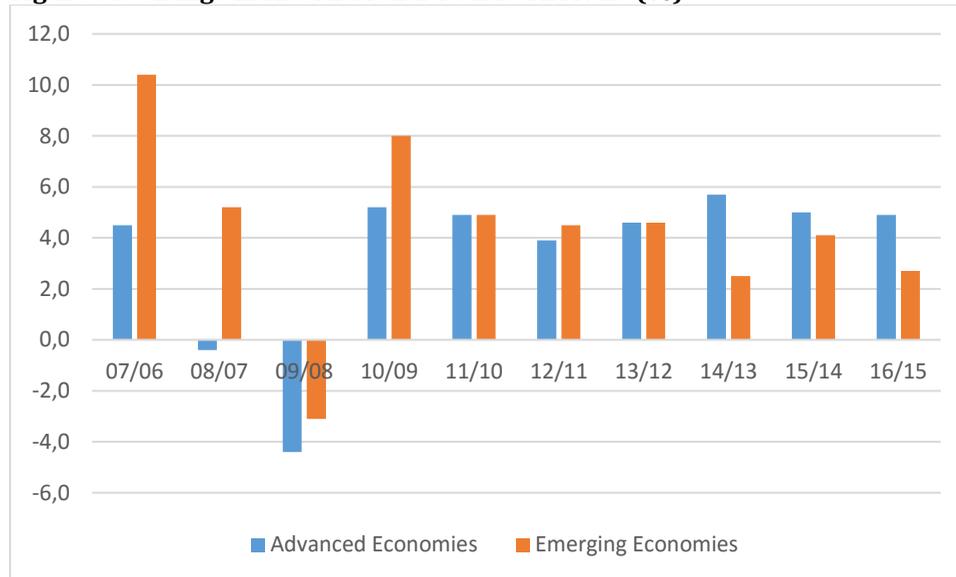
**Source:** World Tourism Organization

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

While many destinations recorded an overall growth, results are more mixed than usual across destinations. According to the UNWTO, growth rate in emerging economies (+2.7%) were below the advanced economies (+4.9%), with Africa (+8%) showing the strongest results in 2016. In 2016, international tourist arrivals to advanced economies were 685 million, while it was 550 million for emerging economies.

Results across emerging economy destinations were uneven in a context of lower commodity prices and weaker economic growth. In 2016, the economic scenario remained comparatively volatile with growth gradually picking up in advanced economies contrasting with a slowdown in emerging ones.

As displayed on Figure 3.2, 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.

**Figure 3.3 Change in International Tourist Arrivals (%)**

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

In terms of regions, the UNWTO reports that Asia and the Pacific region (+9%) was the best performer in 2016 and the number of international tourists grew by 24 million to reach 308 million in this region. Growing purchasing power, increased air connectivity, more affordable travel and visa relaxation arrangements were major reasons of the growth.

**Table 3.2 International Tourism Arrivals by Region (Millions)**

Tourist Arrivals	2000	2010	2014	2015	2016	Share (%)
<b>World</b>	<b>674</b>	<b>949</b>	<b>1.134</b>	<b>1.186</b>	<b>1.235</b>	<b>100</b>
<b>Europe</b>	386.4	488.7	580.2	607.6	616	50
<b>Asia&amp;Pacific</b>	110.3	205.4	264.3	279.2	308	25
<b>Americas</b>	128.2	150.1	181.9	192.6	200	16
<b>Africa</b>	26.2	49.7	55.3	53.5	58	5
<b>Middle East</b>	22.4	54.8	52.4	53.3	54	4

Source: World Tourism Organization, Tourism Highlights 2017

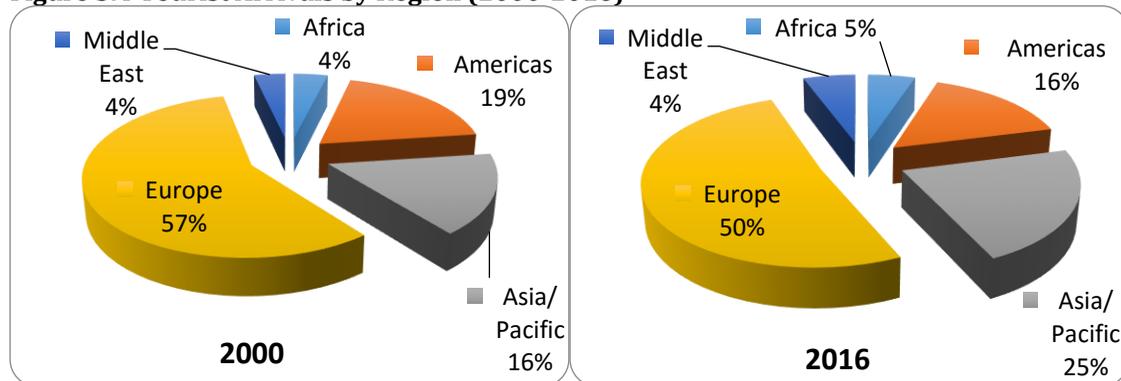
According to the Table 3.2, **Europe (+2%), Asia and the Pacific (+9%), the Americas (+3%), Africa (+8)** showed continued growth in 2016 except **Africa (-4%)**.

In 2016, Europe (+2%) hosted half of the international tourists (616 million). This is an increase of 13 million from 2016. Asia and the Pacific recorded 24 million more international tourist arrivals compared to 2015 to reach 308 million. International tourist arrivals in the Americas grew 7 million to reach 200 million. Limited data available for Africa points to an estimated 8% increase corresponding to 4 million more arrivals which points a strong recovery. North Africa (3%), South Africa (13%) and Sub-Saharan Africa (10%), all recorded significant increases partly due to simpler visa procedures, air and sea connectivity and strengthening security. Contrary to previous other regions Middle East recorded a 4% decrease despite strong growth in Lebanon (+11%), Oman (+11%), Dubai (5%) and Jordan (3%). On the other hand, following the security

incidents and travel warnings in source markets, Egypt recorded a 42% decline in 2016. The recent security problems have weighed down on tourist demand in the region, as have health concerns in the aftermath of the Ebola outbreak in a few West African destinations. Slower economic growth in countries depending on oil and commodity exports has also weakened intraregional demand.

To analyze the tourism trends in these regions, it would be useful to compare the results of the last decade. The figure below compares the shares of tourist arrivals by regions for the years 2000 and 2016.

**Figure 3.4 Tourist Arrivals by Region (2000-2016)**



Source: UNWTO, 2017

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

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

International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4 percent a year) of advanced-economy destinations (2.2 percent a year). Emerging economies’ annual growth rate is 4,5% while arrivals to advanced economies only grew by 3,5%. The market share of emerging economies increased from 30% in 1980 to 45% in 2016, and is expected to reach 57% by 2030, equivalent to over 1 billion international tourists.

### 3.3 International Tourism Receipts

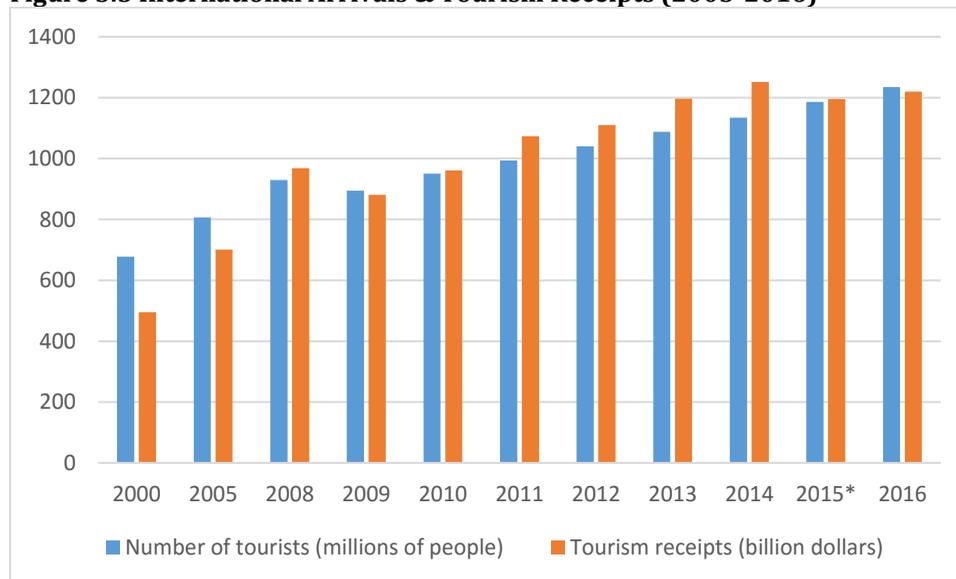
As an internationally traded service, inbound tourism has become one of the world’s major trade categories. International tourism accounts for 30% of the world’s export of services and 7% of overall exports and goods and services. Tourism has been growing faster than global trade for the past five years. International tourism receipts are the earnings generated in receiving countries from expenditures of international visitors on accommodation, food and drink, local transport, entertainment, shopping and other services and goods. For the receiving country

receipts count as exports and for many destinations tourism is a vital source of foreign currency earnings and an important contributor to the economy, creating much needed employment and opportunities for development. From the period 1980 to 2016, international tourism receipts increased from US\$ 104 billion in 1980 to US\$ 1,220 billion in 2016 (UNWTO, 2016a). Average spending per arrival was also 990 US\$.

Figure 3.5 shows the international tourism receipts as well as tourist arrivals for the period 2005-2016. International tourism receipts grew by 2.6 % in real terms (i.e. using local currencies at constant prices in order to adjust for inflation and exchange rate fluctuations) in 2016 by reaching to US\$ 1,220 billion. The unusually strong exchange rate fluctuations in 2015 and 2016 significantly influenced receipts for individual destinations and regions expressed in current US dollars. As the US dollar appreciated against virtually all other currencies in the last two years, earnings in local currencies converted to US\$ were in many cases lower than in 2014. In absolute terms, international tourism receipts in destinations around the world decreased by US\$ 32 billion compared to 2014. In euro for example total receipts were 942 billion euro in 2014 and 1102 billion euro in 2016.

In addition to receipts earned in the destinations (the travel item of the balance of payments), international tourism also generated US\$ 216 billion in exports through international passenger transport services rendered to non-residents in 2016. As such, total receipts from international tourism, including international passenger transport, reached US\$ 1.4 trillion in 2016 resulting a contribution of US\$ 4 billion a day to global export earnings.

**Figure 3.5 International Arrivals & Tourism Receipts (2005-2016)**



Source: UNWTO

Advanced economy destinations (+1.6%) recorded somewhat slower growth also in receipts than emerging economy destinations (+4.4%). By region, the largest increase in receipts for the Africa was recorded as +8% (in real terms) in 2016. It is followed by Asia and the Pacific by +5%, Americas by +3% and Europe by 1%. The receipts in Middle East declined by -2% in 2016.

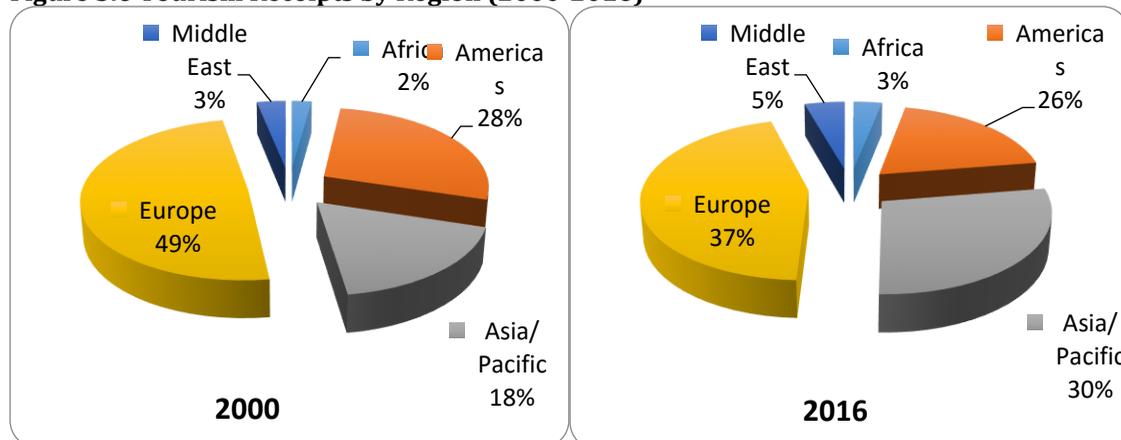
**Table 3.3 International Tourism Receipts by Region (Billion \$)**

Tourism Receipts	2000	2014	2015	2016	Share (%)
<b>World</b>	<b>475</b>	<b>1,252</b>	<b>1,196</b>	<b>1,220</b>	<b>100</b>
<b>Europe</b>	234.5	513.7	449.6	447.3	36.7
<b>Asia &amp; Pacific</b>	86.7	359	349.4	366.7	30.1
<b>Americas</b>	132.8	288.9	305.6	313.2	25.7
<b>Africa</b>	10.8	36.5	32.8	34.8	2.9
<b>Middle East</b>	12.7	53.6	58.2	57.6	4.7

Source: UNWTO, Tourism Highlights 2002&2013&2017 Edition

In Europe, international tourism receipts grew by 1% in real terms to US\$ 447 billion, representing 37% of worldwide receipts. Individual destinations had mixed results for 2016 while Iceland, Norway, Ireland, Georgia, Slovakia, Bulgaria, Romania, Lithuania, Portugal, Spain, Cyprus and Malta reported double digit growth some important destinations such Turkey, France and Belgium recorded declines, because of terrorist attacks and security concerns.

**Figure 3.6 Tourism Receipts by Region (2000-2016)**



Source: UNWTO, Tourism Highlights 2013 & 2017 Edition

Accounting for 30% of international receipts, in 2016, Asia-Pacific region earned US\$ 367 billion in international tourism receipts, this means an increase of 5% in real terms compared to 2015. Korea, Japan, Macau, Vietnam, Indonesia, Philippines, Australia, New Zealand, India, Nepal and Sri Lanka reported double digit growth in receipts in 2016.

According to the UNWTO (2017a); Americas, accounts for 26% of international tourism receipts worldwide, and increased its tourism receipts by 3% in real terms to US\$313 billion. Canada, Chile, Colombia, Cuba, Costa Rica and Uruguay enjoyed double digit growths in receipts. USA, Ecuador, Panama and Aruba recorded slight declines in 2016.

In 2016, parallel to its growth in arrivals Africa experienced a strong rebound in receipts as well. Receiving 35 billion USD in 2016 the region enjoyed an increase of 8% in real terms compared to 2015. South Africa, Kenya, Madagascar, Cabo Verde, Mauritius, Seychelles all enjoyed double digit growth in receipts in 2016.

International tourism receipts in Middle East declined by -2% to 58 billion US\$. Lebanon and Oman both enjoyed double digit growth while Egypt as a major destination lost 42% of its receipts compared to 2015. Yet, signs recovery is evident in the first months of 2017.

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

According to WTTC, the direct contribution of Travel & Tourism to GDP in 2016 was \$198.1 billion (3.2% of GDP) in the OIC member states. This is forecasted to rise by 3.8% in 2017. The direct contribution of Travel & Tourism to GDP is also expected to grow by 4.8% yearly to \$327.4 billion (3.2% of GDP) by 2027.

The total contribution of Travel & Tourism to Member States' GDP (including indirect and induced impacts) was USD542.4 bn in 2016 (8.7% of GDP) and is expected to grow by 3.9% in 2017 and rise by 5% pa to USD914.5bn by 2027 (9.2% of GDP) (WTTC. 2016).

**Table 4.1 Estimates and Forecasts of Travel&Tourism Economic Impact in OIC Member States**

COMCEC	2016 (\$ billion) <sup>1</sup>	2016 % of total	2017 Growth <sup>2</sup>	2027 \$ billion <sub>1</sub>	2027 % of total	Growth <sub>3</sub>
<b>Direct contribution to GDP</b>	198.1	3.2	3.8	327.4	3.2	4.8
<b>Total contribution to GDP</b>	542.4	8.7	3.9	914.5	9.2	5.0
<b>Direct contribution to employment<sup>4</sup></b>	13,257	2.4	1.3	17,620	2.5	2.8
<b>Total contribution to employment<sup>4</sup></b>	35,514	6.4	1.2	48,039	6.8	2.9
<b>Leisure spending</b>	271.9	2.4	2.9	446.6	2.4	4.8
<b>Business spending</b>	87.8	0.7	7.3	147.2	0.8	4.6
<b>Capital investment</b>	108.6	6.7	5.0	198.8	7.5	5.7

<sup>1</sup>2016 constant prices and exchange rates; <sup>2</sup>2017 real growth adjusted for inflation (%); <sup>3</sup> annual real growth adjusted for inflation; <sup>4</sup>000 jobs

Source: WTTC, Economic Impact 2017 Report-COMCEC

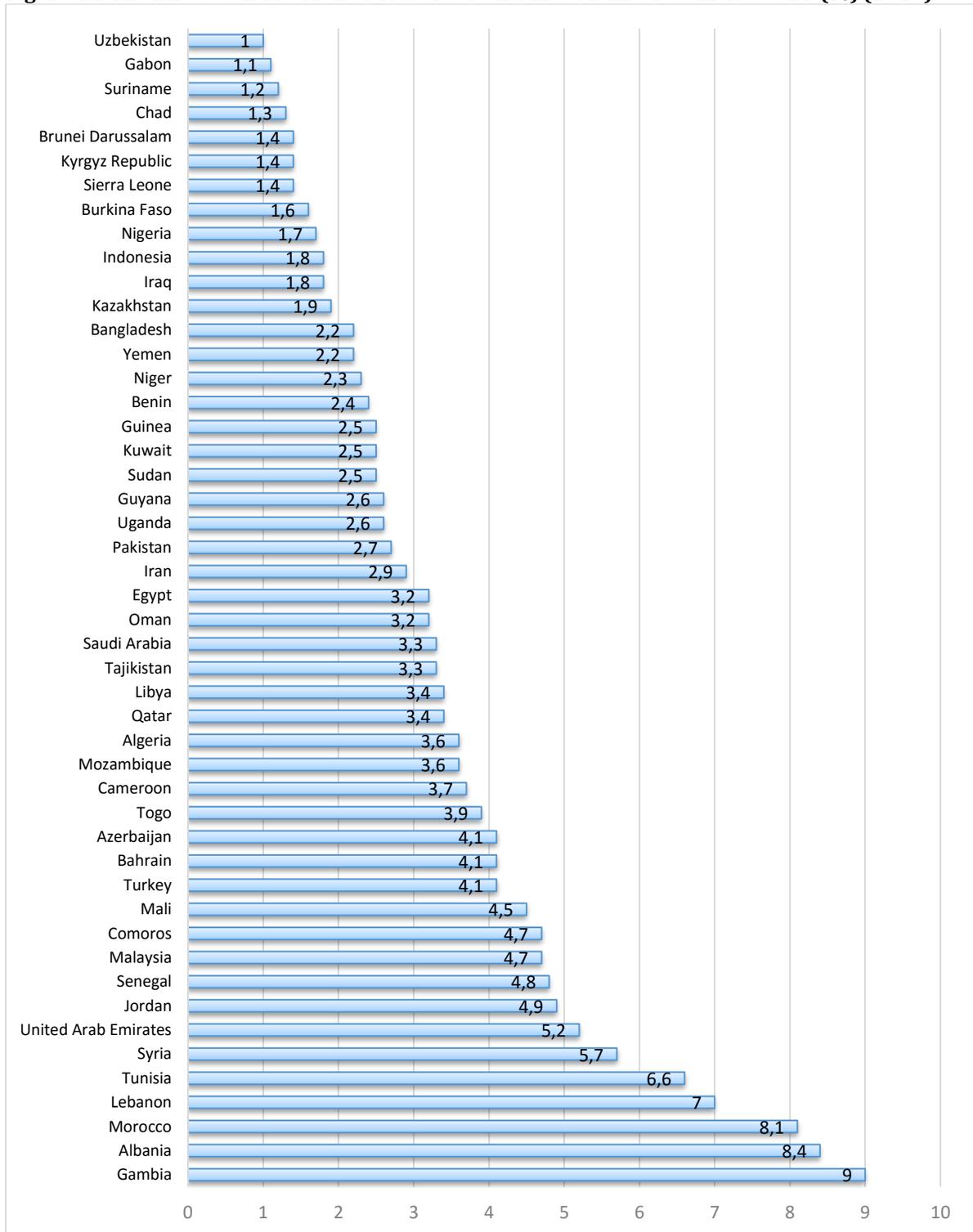
Travel & Tourism in OIC generated 13,256,500 jobs directly in 2016 (2.4% of total employment) and this is forecast to grow by 1.3% in 2017. This includes employment by hotels, travel agents, airlines and other passenger transportation services. It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists. By 2027, Travel & Tourism will account for 17,620,000 jobs directly, an increase of 2.8% pa over the next ten years. Total contribution of travel and tourism to employment in OIC member states is 35,513,000 jobs in 2016 (6.4% of total employment) (WTTC, 2017). Leisure spending (inbound and domestic) in OIC member states generated 76% of direct travel & tourism GDP in 2016.

In Figure 4.1, direct contribution of travel and tourism to GDP can be seen for 48 member countries in 2016. This figure expresses the importance of travel and tourism for economies of member states. Meanwhile, this figure excludes Maldives, since travel and tourism's direct contribution was 40.9% in Maldives which makes the figure inapprehensible to analyze. As one of the small island developing states, Maldives is the most tourism-dependent country which relies on tourism income. This dependence on tourism in particularly island countries would make them more vulnerable, as the tourism might be unstable, particularly sensitive to economic fluctuations in the tourists' countries of departure and to international political events.

Because of its multiplier impact many countries have embraced tourism as a tool to boost their economy. GDP contribution of travel and tourism is relatively high in countries like Gambia (9.0%), Albania (8.4%) and Morocco (8.1%). As the tourism sector is vulnerable to crises, these countries are particularly more sensitive to economic fluctuations and to international political events.

According to the WTTC data for the year 2016, countries with little reliance on tourism as part of GDP include Uzbekistan and Gabon, travel and tourism makes up about 1 percent of total GDP in each. These countries are less dependent on tourism industry in their economy. It is important to note that diversification in an economy is healthy, however if a country or region becomes dependent for its economic survival upon one industry, it can put major stress upon this industry as well as the actors involved to perform well.

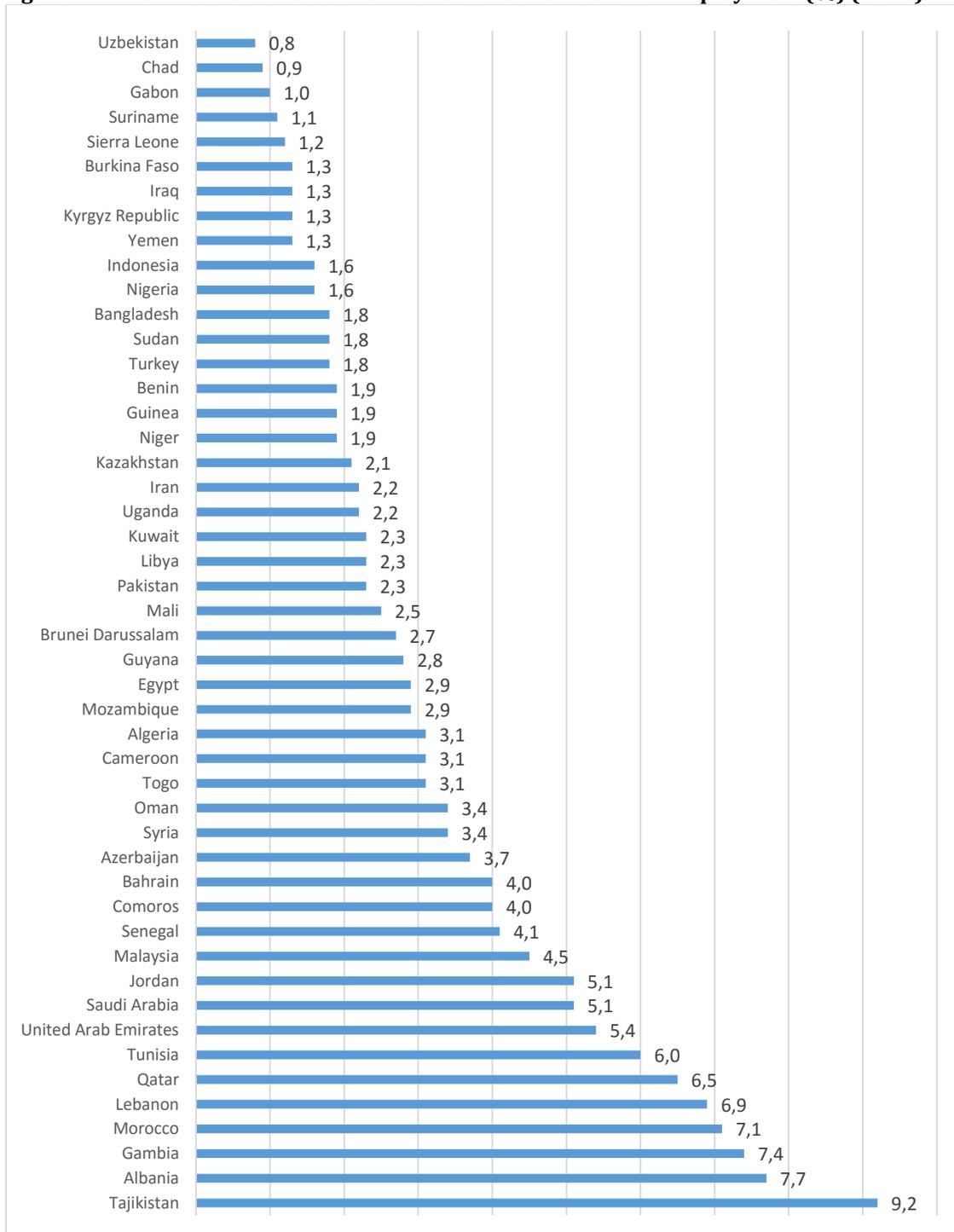
**Figure 4.1 The Direct Contribution of Travel & Tourism to Member Countries' GDP (%) (2016)**



Source: WTTC, Country Reports, 2017

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

**Figure 4.2 The Direct Contribution of Travel & Tourism to Total Employment (%) (2016)**



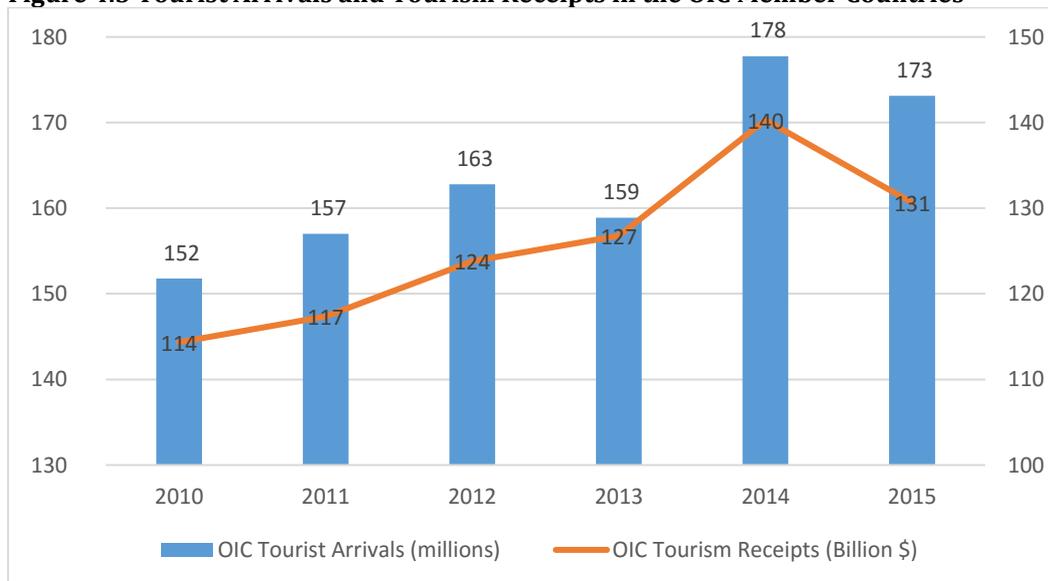
Source: WTTC, Country Reports, 2017

In 2016, Travel & Tourism directly supported 2.4% of total employment in 48 member states (See Appendix). Tourism continues to be an important economic sector capable of the creation of employment opportunities and poverty alleviation.

According to WTTC, 19.7% of total employment depends on travel and tourism in Maldives for the year 2016. Direct contribution of travel and tourism was 9.2% in Tajikistan, 7.7% in Albania, 7.4% in Gambia and 7.1% in Morocco in 2016. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment, banking & finance and promotion and publicity services and so on tourism’s contribution to employment tends to be slightly higher in these countries. However, in some countries like Uzbekistan, Chad and Gabon, travel and tourism contribution is less than other sectors.

Figure 4.3 displays international tourism activity in the member countries in terms of both tourist arrivals and tourism receipts in recent years. Because of lack of data on the number of tourist arrivals and tourism receipts of some countries estimations are made. During the 2010-2014 period, shown in Figure 4.2, there was a trend of increasing tourist arrivals, however, in 2015 the number of tourist arrivals decreased from 178 million to 173 million in OIC Member States. The share in the total international tourist arrivals worldwide decreased from 15.7 percent to 14.6 percent in 2015. 2016 data for the majority of OIC member are not yet available.

**Figure 4.3 Tourist Arrivals and Tourism Receipts in the OIC Member Countries**



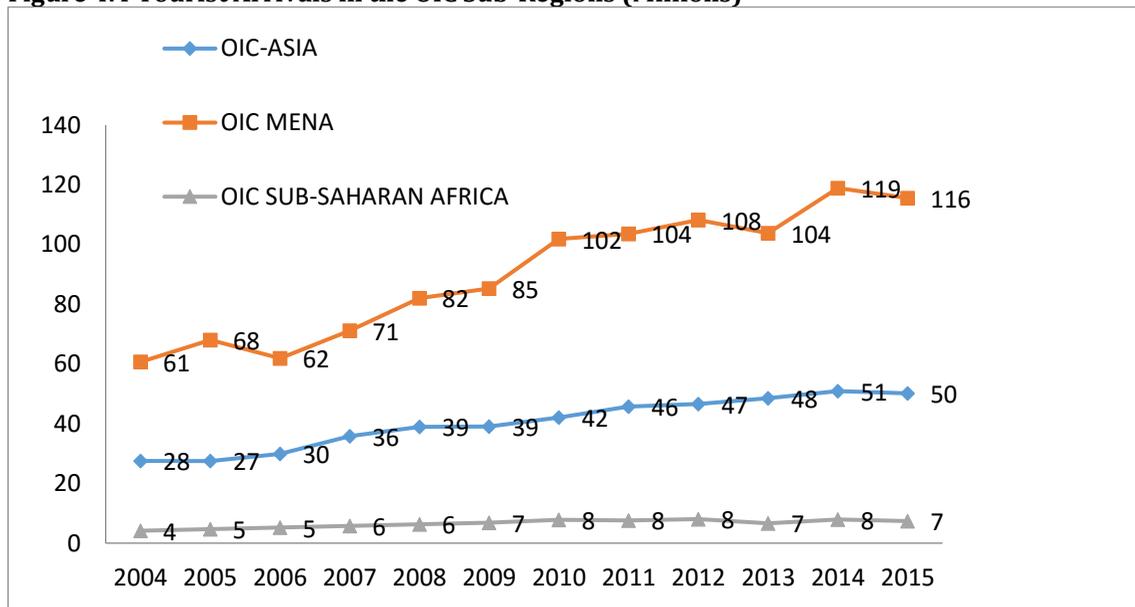
Source: adopted from UNWTO, 2016

The number of tourism receipts of the member countries decreased from \$140 billion to \$131 billion in 2015, corresponding to a 10 percent share in world’s total tourism receipts. In 2015, unusually strong exchange rate fluctuations significantly influenced receipts for member countries expressed in current US dollars. As the US dollar appreciated against virtually all other currencies in 2015, earnings in local currencies converted to US\$ were in many cases lower than in 2014. In absolute terms, tourism receipts in OIC member states decreased by US\$ 9 billion. Generally, a certain destination becomes more price-competitive when its currency depreciates

relative to the currencies of its source markets. Similarly, it becomes less affordable, when its currency appreciates against the currencies of its visitors. An appreciating currency increases the purchasing power of a country's travelers abroad, but makes the destination more expensive for international generating markets against whose currencies it has appreciated.

It can be useful to analyze the trends by grouping the OIC member countries as OIC-MENA, OIC-Asia, and OIC-Sub-Saharan Africa, which are provided at Figure 4.4. As displayed in the figure OIC-MENA has the biggest share among tourist arrivals in the member states. In this region, the number of tourist arrivals is forecasted to decrease from 119 million to 116 million in 2015 according to available data.

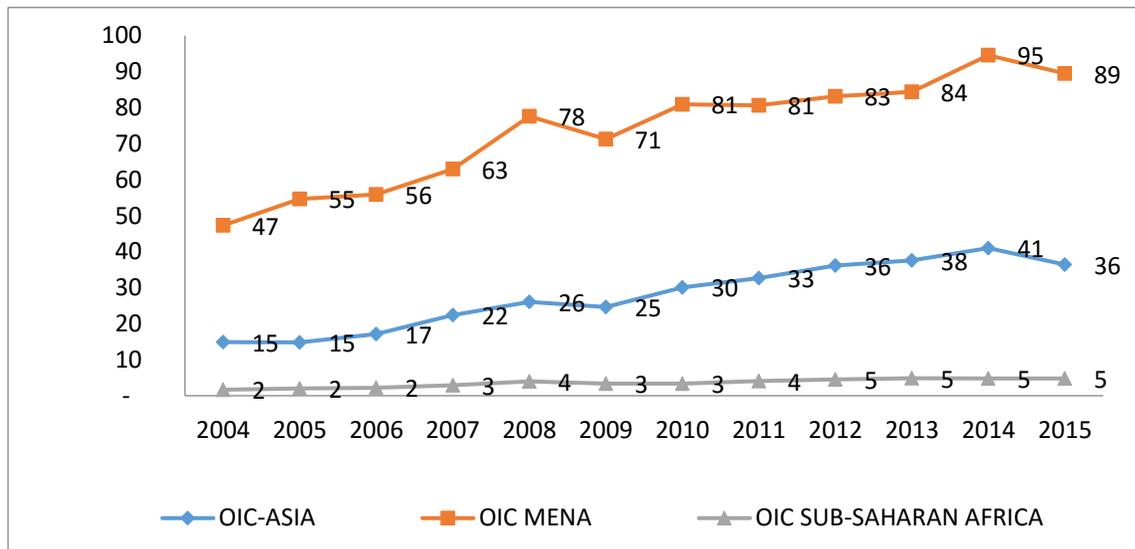
**Figure 4.4 Tourist Arrivals in the OIC Sub-Regions (Millions)**



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

Figure 4.4 shows that OIC-Asia has experienced continued growth in tourist arrivals for the period 2004-2014. However, in 2015, 50 million tourists travelled to OIC-Asia region. 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 4.5 shows that tourism receipts in OIC-MENA is greater than the other two regions.

**Figure 4.5 Tourism Receipts in the OIC Sub-Regions**

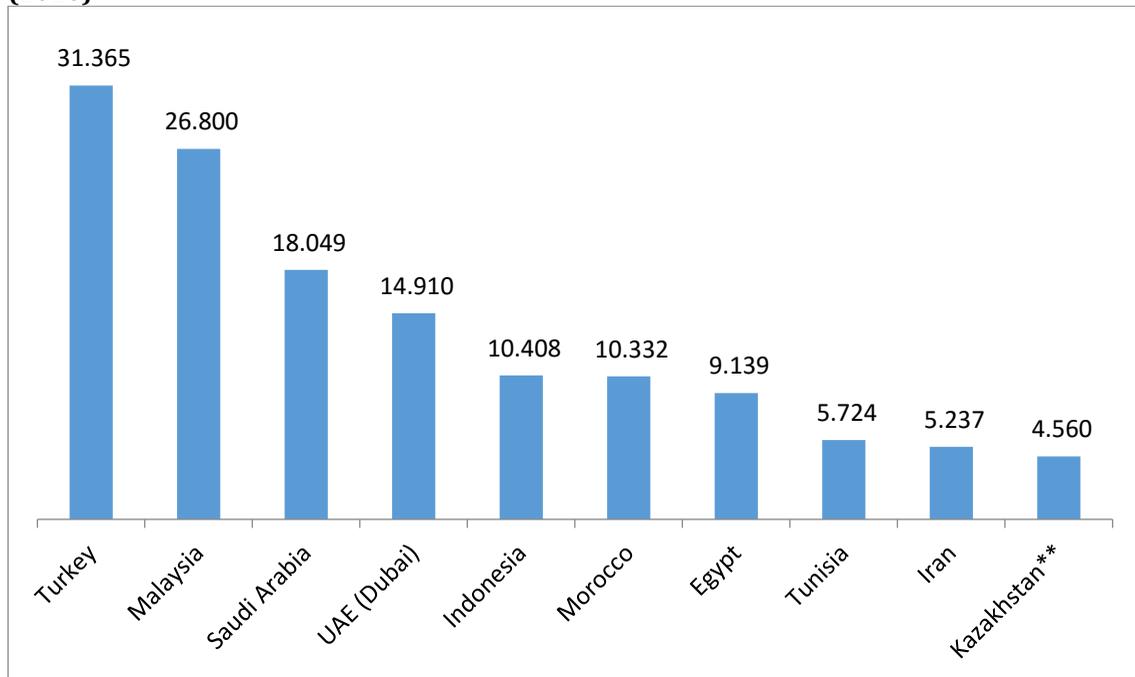


Source: UNWTO Tourism Highlights 2006, 2009 and 2016 Editions.

According to available data, tourism receipts in OIC Mena decreased from \$95 billion to \$89 billion in 2015. It is important to note that exchange rate fluctuations can represent comparisons in total spending between countries, as well as changes in absolute terms over time. For example, if the US dollar appreciates versus the currency of one-member state, tourism spending in this country translates into a lower amount of US dollars from one year to another. This does not necessarily mean that spending was lower, but simply that the same amount of that country’s currency converts into less dollars.

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

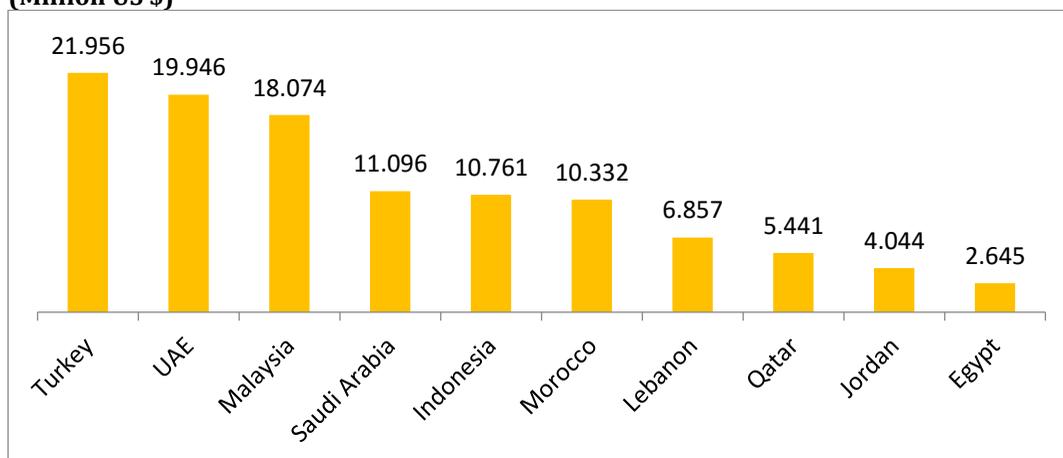
**Figure 4.6 Top 10 OIC Tourism Destinations in International Tourist Arrivals (Thousand) (2016)**



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

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

**Figure 4.7 Top 10 OIC Tourism Destinations in International Tourism Receipts in 2016 (Million US \$)**



Source: UNWTO, Tourism Highlights 2017

As in the case of OIC tourist arrivals, the Figure 4.7 indicates that tourism receipts in the OIC countries are concentrated in a small number of countries, almost the same countries of the

main COMCEC tourist destinations. The remaining OIC Member Countries' tourist arrivals and tourism receipts data are given in Appendix (Table 1 and Table 2) based on 2015 data, as most OIC member statistics are not yet available for 2016.

Turkey hosted 39.5 million tourists in 2015. Because of the recent developments, terrorist activity and attempted coup, the country has suffered in terms of inbound arrivals in 2015 and 2016. Necessary measures are taken by the government in order to recover from the decrease in tourist arrivals. Almost 25% of the arrivals were lost in 2016 in Turkey, signs of recovery from the beginning of 2017 is evident but Turkey's recovery considering tourism receipts seems to be slower. UAE recorded an increase from 10 million to almost 15 million. Malaysia also recorded a slight increase. Malaysia introduced online visa applications for its major markets. Awareness of the country's many attractions is improving and international transport connections are expanding, making Malaysia much more accessible to potential visitors. As number of visitors to Malaysia increases over time, it is expected that investment in the hotel and accommodation sector will expand. Moreover, Malaysia Airlines and Emirates Airlines are launching a widespread code-share partnership in 2016, expanding Malaysia Airlines' access to European destinations and Emirates' access to various destinations in Asia (BMI Research, 2016).

Saudi Arabia reported a slight increase in 2016. Following the tragic loss of life in the September 2015 stampede during a Hajj ritual outside of Mecca, the government, having come under significant international criticism for its handling of the event, has committed to major investments in transport, safety and accommodation infrastructure in order to support the rapid expected expansion in international arrivals each year for religious pilgrimage. The government is reportedly considering easing visa restrictions to encourage more international tourism arrivals. Further, the outlook for sector has arguably brightened following the launch in April 2016 of the government's economic diversification strategy, referred to as Vision 2030. Religious pilgrimages remain the largest source of inbound tourism to Saudi Arabia and the government continues to invest in supporting infrastructure such as the 450km high speed rail network connecting Madinah with Makkah, King Abdullah Economic City and Jeddah (BMI Research, 2016).

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

In 2015, Morocco (-1%) posted weak results, affected by a decrease in arrivals from its major source market France. The strength of the euro against the Moroccan dirham, combined with the increasing number of low-cost airlines and routes between European countries and Morocco, will drive up the number of inbound arrivals in the next five years. A slight increase in arrivals and a larger impact on receipts from 6bn to 10 bn USD is already recorded in 2016.

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

In North Africa, international arrivals in Tunisia and Algeria started to grow considerably in 2016 after security problems in 2015. (BMI Research, 2016).

In order to compare the performance of the countries, major surplus on the travel balance would be a useful tool, since it shows that more foreign exchange stays in the country. Table 4.2 shows member countries by major surplus on the travel balance between 2013 and 2015.

**Table 4.2 Member Countries by Major Surplus/Deficits on the Travel Balance in 2013-2015 (US\$ billion)**

	Tourism Receipts			Tour. Expenditures			Balance		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
<b>Turkey</b>	28.0	29.6	26.6	4.8	5.1	5.4	23.2	24.5	21.2
<b>Malaysia</b>	21.5	22.6	17.6	12.2	12.4	10.5	9.3	10.2	7.1
<b>Morocco</b>	6.9	7.1	6.0	1.3	1.4	1.4	5.5	5.6	4.6
<b>Egypt</b>	6.0	7.2	6.1	3.0	3.1	3.4	3.0	4.1	1.7
<b>Indonesia</b>	9.1	10.3	10.7	7.7	7.7	7.3	1.4	2.6	3.4
<b>Kuwait</b>	0.3	0.4	-	11.6	11.3	-	-11.3	-10.9	-
<b>S. Arabia</b>	7.7	8.2	10.1	17.7	24.1	20.7	-10.0	-15.9	-10,6
<b>UAE</b>	12.4	14.0	16.0	13.8	14.4	15.1	-1.4	-0.4	0.9
<b>Qatar</b>	3.5	4.6	5.0	6.6	8.7	8.2	-3.1	-4.1	-3.2

Source: UNWTO, 2016 Tourism Barometer Volume14, May 2016.

According to the Table 4.2, Turkey ranked as 5<sup>th</sup>, Malaysia as 15<sup>th</sup>, Morocco as 22<sup>th</sup> and Indonesia as 25<sup>th</sup> country by major surplus on the travel balance in international tourism market. In 2015, Turkey's tourism receipts were US\$ 22.2 billion, however Turkish citizens spent US\$ 5 billion in other countries. This means that US\$ 17.2 billion stayed in the country as a surplus on the travel balance. This surplus is very important for countries as a source of foreign exchange in their economies. It can be realized from the Table 4.2 that some countries have a tendency to spend more than their tourism receipts. It is obvious that the majority of these countries are the main OIC international tourism destinations and earners. It is also observed that the balance of international tourism of some member countries accounts for a high percentage of their international tourism receipts. For example, countries like Saudi Arabia, Kuwait and Qatar have deficits on travel balance.



Safety and security concerns and political stability are emerging as major challenges for OIC member states, and it is assumed that these issues will continue to cause difficulties in the years ahead. Governments should work hard to ensure the safety of tourists and to minimize the impact of security threats. Terrorist incidents, refugee crises in 2015 and 2016 are still important obstacles for tourism in the region. The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and will affect market share and rankings of OIC destinations.

## 5 Risk and Crises Management the OIC Member Countries<sup>1</sup>

Tourism is highly vulnerable to internal and external shocks as diverse as economic downturns, natural disasters, epidemic diseases, terror attacks and political conflicts. Although these have become global issues, particularly OIC countries have suffered several of these events within recent years with serious impacts on their tourism industry. Therefore, there is a need for solid policies on measures that can be taken by OIC countries before (risk management), during (response) and after (recovery) the crises.

Crises can be defined as an unexpected and disruptive event that threatens the existing business operations (Avci et al., 2011). From the perspective of tourism; crises can be defined as an event or a set of circumstances which might damage the reputation, sales and operations in a destination and organizations within the tourism industry (PATA, 2011). Crises also require various immediate actions, decisions and countermeasures based on the nature, extent and duration of its consequences (UNWTO, 2011).

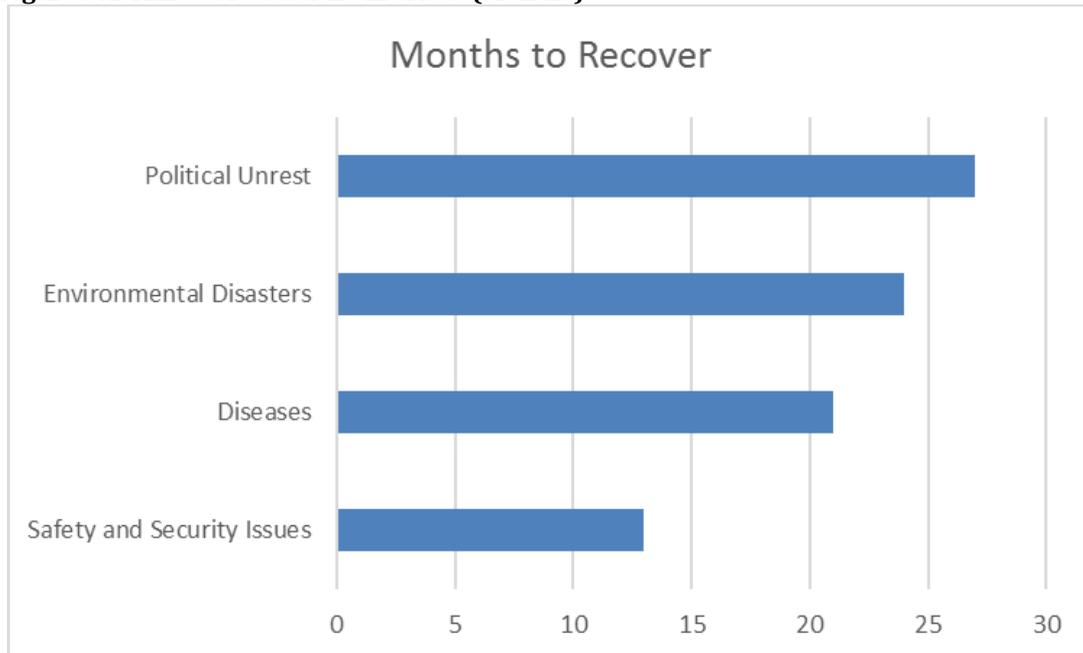
Crises that affect tourism might be classified based on their origin and their impacts. Regarding their origin; two broad categories can be identified. Internal crises might refer to incidents originated from internal organizational human induced issues such as financial fraud, loss of data, crime, food poisoning, fire, flood etc. resulted from deficiency within internal management. External crises on the other hand refer to events that are beyond the control of immediate management within the organization such as natural disasters, political conflicts, social unrest, epidemics, acts of war and terrorism.

The impact of these events therefore might be immediate and long-lasting depending on type of crises, its intensity, whether tourists were targeted or affected, which locations are involved, the extend of infra-structural damage, time of the year, the scale and extent of media coverage, travel warnings issued and so on. Contrary to major belief acts of terror have a relatively short term impact whereas political unrest has a much more gradual impact and often lasts for a longer time. Particularly safety and political stability have become prerequisites for tourism (ITB, 2015). Figure 1 displays recovery duration for various types of crises.

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<sup>1</sup> The 10<sup>th</sup> Meeting of the COMCEC Tourism Working Group will be held with the theme of Risk and Crises Management: Recovery from Crises in the OIC Member Countries. Thus, the Tourism Outlook 2017 includes this section as an introductory section for the meeting.

**Figure 5.1 Time to recover from crises (Months)**



Source Adapted from ITB (2015).

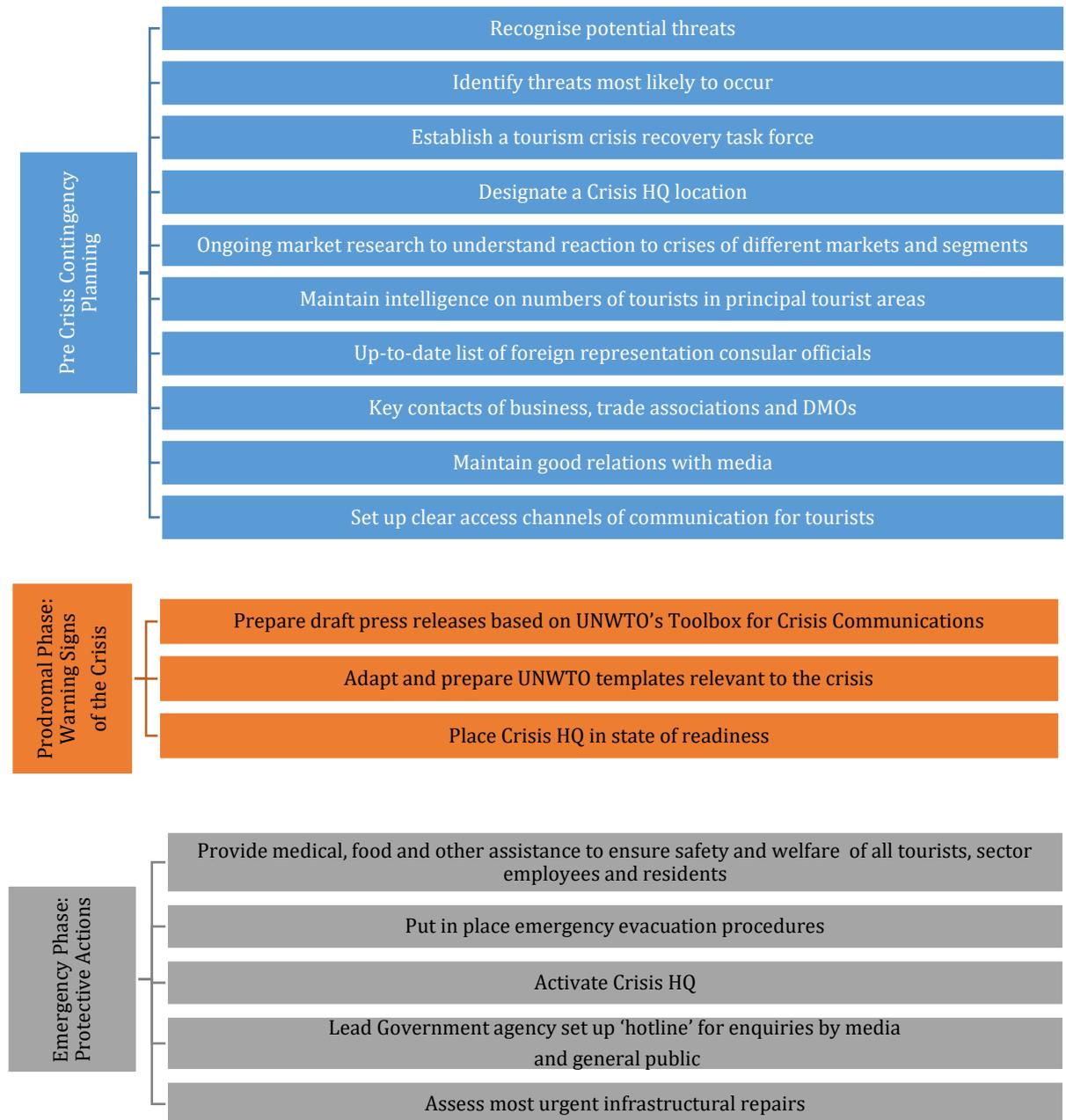
Depending of the severity of the crises destinations might experience sharp declines in arrivals and receipts. In order to handle these different types of crisis, a strategic approach is needed for both organizations and destinations. Since the impacts of crises are international and unpredictable, countries should incorporate crises management structures into their planning especially considering image building, assurance, safety and recovery incentives for the industry.

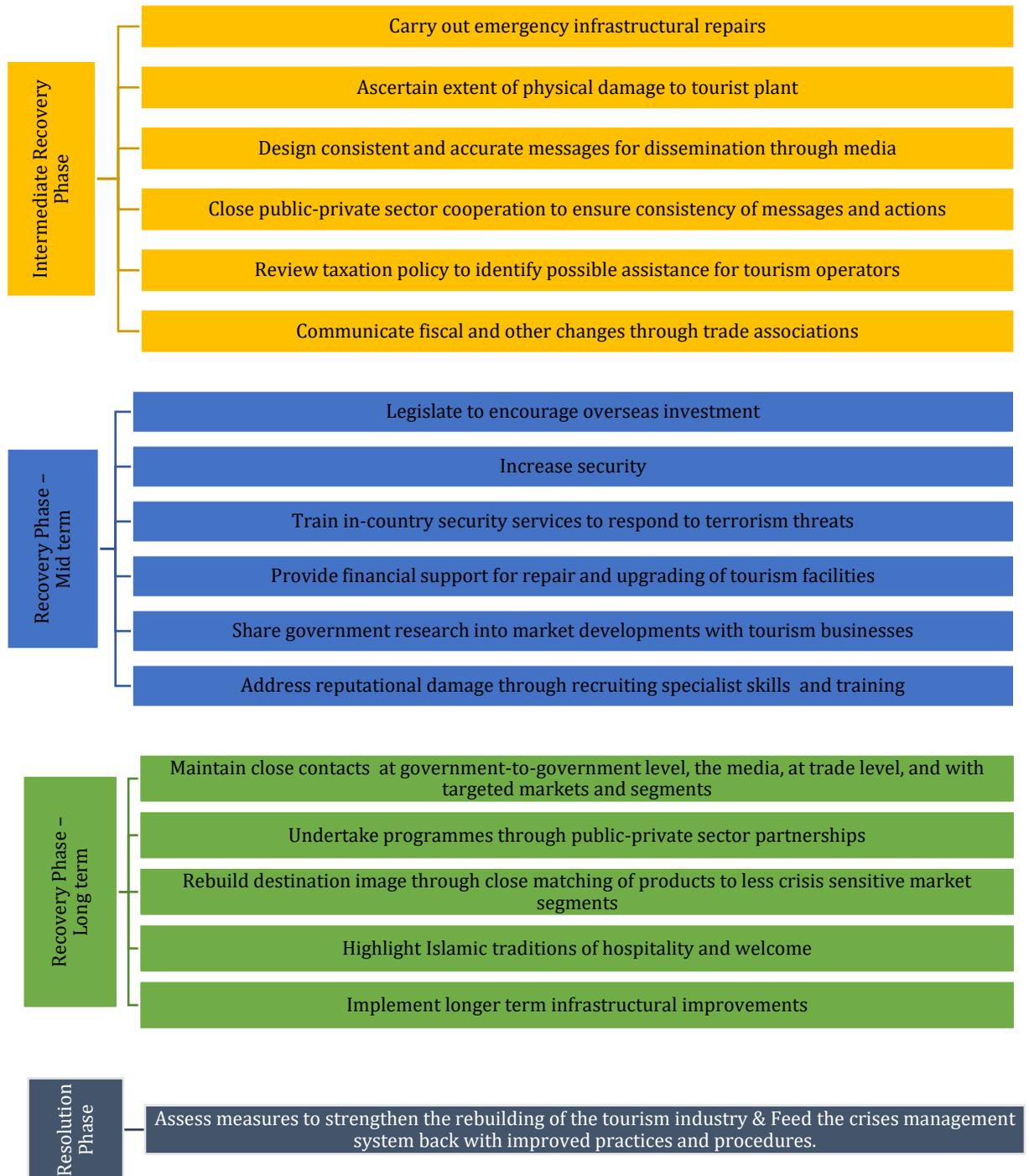
Because of increased frequency and global nature of crises such as terrorism, crisis management became essential for all destinations (Santana 2004). The multi-stage (i.e. risk management, response and recovery) and multidisciplinary nature of crisis management (e.g. economics, politics, sociology, psychology, environmental science, management etc.) requires a systemic approach and a comprehensive effort.

Given the importance of this issue, COMCEC Tourism Working Group would focus on crises management in its 10th Meeting to be held on September 21st, 2017. An analytical study on “Risk & Crisis Management in Tourism Sector: Recovery from Crisis in the Member Countries” has been prepared to identify the measures member countries which can be taken to revamp the tourism sector before, during and after crisis.

Crisis and risk management planning includes establishing structures to develop policies and courses of action to be taken and covers arrangements and procedures based on seven phases; Pre-Crises Contingency, Prodromal, Emergency, Intermediate Recovery, Midterm Recovery, Long Term Recovery, Resolution. The principle actions at each stage are displayed on Figure 5.2.

**Figure 5.2. Risk and Crises Management Actions at Different Stages**





In order to identify effective strategies and policy recommendations a series of eight case studies were also conducted: four were OIC Member States (i.e. Indonesia, Turkey, Tunisia, The Gambia), and four were non-OIC countries (i.e. South Africa, the United Kingdom, Thailand, Sri Lanka).

The principal conclusions arising from these case studies in respect of critical success factors were:

- Where countries (or destinations) already have a robust tourism industry with strong underlying USPs, good recognition as a brand, and good customer loyalty, it is more likely that recovery from crisis will be swift.
- The most successful recovery has been evidenced where there is strong government commitment to the industry as well as leadership in terms of strategy, policy, and understanding of market trends.
- Recovery is also effective where there is clear evidence of public and private sectors working together and supported by the residents.
- Deregulation of over-bureaucratic procedures and introducing incentives for encouraging foreign investment were also identified as effective actions.
- Looking to the longer term, some governments have also introduced training programs to build crises resilience human resource capacity generally across the sector.

Hence adopting these policy recommendations in managing risk and crises in OIC states would result in a more resilient and predictable tourism industry against potential external and internal threats. The details of suggested crises management actions are to be presented during the 10<sup>th</sup> Meeting of the COMCEC Tourism Working Group in September, 2017.

## **6 Importance of Tourism Cooperation in the Member Countries**

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

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

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



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

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

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

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

**Figure 6.2 Challenges Affecting Tourism Performance in the Member Countries**

Insufficient Tourism Investments and Infrastructure
Poor Tourism Planning & Product Development
Travel Facilitation Problems
Safety and Security Related Problems
Low Tourism Service Quality
Insufficient Marketing and Promotion
Insufficient Image Building and Branding

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

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

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

## 6.2 Tourism Cooperation under the COMCEC Umbrella

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

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

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

in İstanbul with the theme of "Effective Marketing Strategies for Promoting Tourism Destinations in the OIC Member Countries."

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

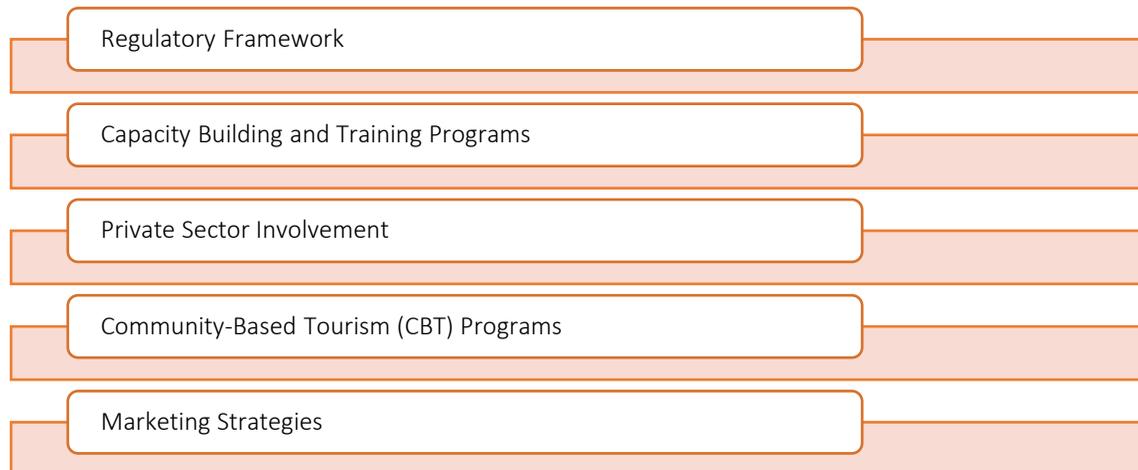
The 4th Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 14-15 January 2016 in İstanbul with the theme of "Promoting Muslim-Friendly Tourism (MFT) Products and Services in the OIC Member Countries." In this forum, the participants discussed the current state of international tourism in the OIC Member Countries as well as prospects and challenges in this regard. Moreover, the participants also deliberated on the global trends and policies in promoting MFT products and services and the challenges faced by the private sector in the Member Countries in promoting MFT products and services. The participants emphasized the importance of raising awareness about MFT, not only in the OIC Member Countries, but also in the Non-OIC world. In this regard, the participants highlighted the significance of the effective utilization of the existing mechanisms under the OIC/COMCEC, such as SMIIC's technical Committee on tourism, for enhancing cooperation in MFT.

The 5th Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 4 May 2017 in İstanbul with the theme of "Crisis Communication and Management in Tourism: Recent Challenges and Solutions in OIC Countries". The Forum emphasized the importance of crisis communication and management in tourism and problems encountered by the Member States on recovering crises and possible solutions.

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

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

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

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

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

- Developing Tourism Workforce Development Strategies in the Member States and supporting the effective implementation of the existing ones

- The importance of enhancing the capacity of tourism workforce in the member countries.

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

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

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

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

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

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

- Developing basic guidelines for improving the basic MFT-related services.
- Increasing awareness about the MFT market among the travel industry stakeholders through standardizing terminology used in MFT, introducing market awareness and

customer service training programs and utilizing social media for promotion and marketing.

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

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

The 9<sup>th</sup> Meeting of the COMCEC Tourism Working Group was held on February 16<sup>th</sup>, 2017 in Ankara, Turkey with the theme of “Muslim Friendly Tourism (MFT): Regulating Accommodation Establishments in the OIC Member Countries.” The Representatives of the Member States have shared their experiences, achievements and challenges on regulating accommodation establishments in their respective countries. The Meeting has considered the Studies “Muslim Friendly Tourism(MFT): Regulating Accommodation Establishments in the OIC Member Countries” commissioned by the COMCEC Coordination Office and the “COMCEC Tourism Outlook 2016” prepared by the COMCEC Coordination Office. In line with the recommendations of the analytical study as well as the responses of the Member Countries to the policy questions, which were circulated before the Meeting, the Working Group has come up with COMCEC MFT Guideline for Regulating Accommodation Establishments. The COMCEC MFT Guideline available on the COMCEC website ([www.comcec.org](http://www.comcec.org)).

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 1<sup>st</sup> project call under the COMCEC Project Funding, 2 projects in tourism sector were successfully implemented in 2014. One of them was “Cities of Common Cultural Heritage” project implemented by Azerbaijan Ministry of Culture and Tourism. There were 3 partner countries namely; Turkey, Uzbekistan and Kazakhstan in this project. The project aimed at creating a joint cultural tourism product and at the end of the project with the help of the analytical study prepared as an outcome of the project, cultural heritage routes were created. The other project was “Improving Statistical Capacities of Tourism Sector in COMCEC Mediterranean and Gulf Region” proposed by SESRIC. The project covered 6 member countries namely; United Arab Emirates, Jordan, Tunisia,

Albania, Qatar, Oman. This project aimed at improving statistical capacities of the member countries in tourism field and entailed 8 training programs and one workshop in this respect.

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

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

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

The COMCEC Coordination Office made the fourth call for project proposals in September 2016. In this regard the following four projects are being implemented in 2017.

- Developing a Training and Certification Program for the Muslim Travel, Tourism and Hospitality Industry (proposed by Gambia)
- Enhancing Capacity Of Muslim Friendly Tourism Workforce (proposed by Mozambique)
- Enhancing The Capacity of Craft Producers & Customers Service in the OIC Member Countries (proposed by Sudan)
- Training Program on the Development and Promotion of Muslim Friendly Tourism in COMCEC Member Countries (proposed by SESRIC)

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

## 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, 1.235 million international tourists travelled in 2016 with an average annual increase of over 4% since the year 2000. Tourism sector which already accounts for 10 percent of World GDP is an important source of employment and foreign exchange that should be supported by governments around the world as part of the policies for stimulating economic growth.

From the period 1980 to 2016, international tourism receipts—which are the export value of tourism, including international passenger transport—increased from US\$125 billion in 1980 to US\$ 1,220 billion in 2016 (UNWTO, 2017a) denoting a solid increase in four decades. In real terms, this corresponds to an average growth of 4 percent a year, which has almost the same pace as tourist arrivals.

The sector faces some challenges every year and 2017 is likely to be no different. Three main factors influenced tourism flows in 2015 and 2016; the exchange rate fluctuations, the decline in the price of oil and other commodities which increased disposable income in importing countries, as well as increased global concern about safety and security (UNWTO, 2017a).

However, the growth in tourism sector will continue at a stronger rate than last year, with the total contribution to GDP expected to increase by 3.9% in 2017. This growth will require OIC Member Countries to adopt a concerted and coordinated approach to planning and development within the industry, governments and educational institutions to ensure that they fulfill their potential in the future.

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

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

By the groupings in the OIC Member Countries, it is observed that OIC-MENA has experienced expansion in tourist arrivals for the period 2004-2015. 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 2004-2015. Yet the preliminary statistics for 2017 oversees a larger growth in Africa and Asia.

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

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

Safety and security concerns are in the spotlight for OIC member states, and it is assumed that these issues will continue to cause difficulties in the years ahead. COMCEC will also look into risk and crises management issues in 2017. Governments need to ensure the safety of tourists and to minimize the impact of security threats. Incidents like the sector observed in 2015 and 2016 require effective planning and management. These issues will be tackled during the 10<sup>th</sup> Tourism Working Group Meeting in September, 2017.

COMCEC Tourism Working Group will deliberate on destination planning, management and marketing issues from 2018 onwards. The COMCEC Strategy, provides a useful strategic framework for tourism development and tourism cooperation in the Member Countries with its new implementation instruments, namely, Tourism Working Group and Project Cycle Management mechanism.

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

**APPENDIX:**

**Table 1: Tourist Arrivals in the OIC Member Countries (2003-2016)**

Tourist Arrivals (000)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
<b>World (Millions)</b>	<b>689</b>	<b>760</b>	<b>805</b>	<b>851</b>	<b>911</b>	<b>929</b>	<b>894</b>	<b>952</b>	<b>995</b>	<b>1.035</b>	<b>1.087</b>	<b>1.134</b>	<b>1.186</b>	<b>1.235</b>
Afghanistan														
Albania	557	645	748	937	1.127	1.420	1.792	2.417	2.932	3.156	2.857	3.341	3.784	4.070
Algeria	1.166	1.234	1.443	1.638	1.743	1.772	1.912	2.070	2.395	2.634	2.733	2.301	1.710	-
Azerbaijan	768	989	693	682	732	1.043	1.005	1.963	2.239	1.986	2.130	2.160	1.922	2.045
Bahrain	-	-	1237	-	-	-	-	955	-	1.014	1.069	838	1.200	-
Bangladesh	245	271	208	200	289	467	267	303	-	125	148	125	-	-
Benin	175	174	176	180	186	188	190	199	209	220	231	242	255	266
Brunei Darussalam	0	119	126	158	179	226	157	214	242	209	225	201	218	219
Burkina Faso	163	222	245	264	289	272	269	274	238	237	218	191	163	-
Cameroon	0	190	176	185	262	298	498	573	604	812	912	-	-	-
Chad	21	26	29	16	25	22	70	71	77	86	100	122	120	-
Comoros	21	23	26	29	15	-	11	15	19	-	-	23	24	-
Cote d'Ivoire	180	-	-	-	-	-	-	252	270	289	380	471	1441	-
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	9.139	5.258
Gabon	222	244	269	296	325	358	186	-	-	-	-	-	-	-
Gambia	89	90	108	125	143	147	142	91	106	157	171	156	135	-
Guinea	44	45	45	46	30	-	-	12	-	96	56	33	35	-
Guinea-Bissau	0	0	5	12	30	-	-	22	-	-	36	36	44	-
Guyana	101	122	117	113	134	130	141	150	157	177	200	206	207	235
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	9.963	-
Iran	1.546	1.659	1.889	2.735	2.172	2.034	-	2.938	3.354	3.834	4.769	4.967	5.237	4.942
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	3.763	3.858
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	198	182	-
Kyrgyz Republic	342	398	319	766	1.656	2.435	2.147	1.316	3.114	2.406	3.076	2.849	3.051	-
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	1.518	1.688
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	25.721	26.757
Maldives	564	617	395	602	676	683	65	792	931	958	1.125	1.205	1.234	1.286
Mali	110	113	143	153	164	190	160	169	160	134	142	168	159	-
Mauritania	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Morocco	4.761	5.477	5.843	6.558	7.408	7.879	8.341	9.288	9.342	9.375	10.046	10.283	10.177	10.332
Mozambique	441	470	578	664	771	1.815	1.461	1.718	1.902	2.113	1.886	1.661	1.552	1.639
Niger	55	57	58	60	48	73	66	74	82	94	123	135	135	-
Nigeria	924	962	1.010	1.111	1.212	1.313	1.414	1.555	715	486	600	-	1.255	-
Oman	630	908	1.114	1.336	1.182	1.378	1.524	1.446	1.343	1.438	1.392	1.519	1.897	-
Pakistan	501	648	798	898	840	823	855	907	1.161	966	565	965	-	-
Palestine	37	56	88	123	264	387	396	522	449	490	545	556	432	400
Qatar	557	732	913	946	964	1.405	1.659	1.519	2.527	2.346	2.611	2.826	2.930	2.906
Saudi Arabia	7.332	8.599	8.037	8.620	11.531	14.757	10.897	10.850	17.498	14.276	15.772	18.260	17.994	18.049
Senegal	495	667	769	866	875	-	810	900	1.001	962	1.063	836	1.007	-
Sierra Leone	38	44	40	34	32	36	37	39	52	60	81	44	24	54
Somalia	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sudan	52	61	246	328	436	440	420	495	536	575	591	684	741	-
Suriname	82	138	161	154	167	151	150	204	220	240	249	252	228	257
Syria	2.598	3.399	3.571	4.231	4.158	5.430	6.092	8.546	5.070	-	-	-	-	-
Tajikistan	-	-	-	-	-	325	-	160	-	244	208	213	414	-
Togo	61	83	81	94	86	74	150	202	300	235	327	282	273	-
Tunisia	5.114	5.998	6.378	6.550	6.762	7.050	6.901	7.828	4.782	5.950	7.352	7.163	5.163	5.724
Turkey	-	16826	20273	18916	22248	24994	25506	31.364	34.654	35.698	37.795	39.811	39.478	-
Turkmenistan	8	15	12	6	8	-	-	-	-	-	-	-	-	-
Uganda	305	512	468	539	642	844	807	946	1.151	1.197	1.206	1.266	1.303	-
UAE (Dubai)	5.871	6.195	7.126	-	-	-	6.812	7.432	8.129	8.977	9.990	13.200	14.200	14.910
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	1018	367	-

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

**Table 2: Tourism Receipts in the OIC Member Countries (2003-2016) (US \$ Millions)**

Tourism Receipts	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
<b>World (US \$ Billion)</b>	<b>533</b>	<b>634</b>	<b>679</b>	<b>744</b>	<b>858</b>	<b>941</b>	<b>853</b>	<b>928</b>	<b>1.030</b>	<b>1.075</b>	<b>1.159</b>	<b>1.309</b>	<b>1.260</b>	<b>1.220</b>
Afghanistan	-	-	-	-	-	-	-	55	71	56	56	84	82	49
Albania	537	756	880	1.057	1.479	1.849	1.816	1.626	1.628	1.464	1.473	1.705	1.500	1.691
Algeria	112	178	477	215	219	474	267	219	209	217	250	258	308	-
Azerbaijan	70	79	100	201	317	382	353	621	1.287	2.433	2.365	2.432	2.309	2.714
Bahrain	1.206	864	1.603	1.048	1.105	1.166	1.118	1.362	1.035	1.051	1.165	1.197	-	-
Bangladesh	59	76	79	80	76	75	70	81	87	105	129	153	150	175
Benin	108	121	108	122	206	236	131	133	187	170	189	151	141	-
Brunei Darussalam	124	181	191	224	233	242	254	-	-	92	96	79	140	-
Burkina Faso	38	52	46	55	61	82	64	72	133	84	153	135	109	-
Cameroon	266	212	229	231	254	167	270	159	409	349	576	595	450	-
Chad	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Comoros	16	21	24	27	30	39	32	35	44	39	49	48	40	-
Cote d'Ivoire	76	91	93	104	115	129	151	201	141	172	181	184	158	-
Djibouti	7	7	7	10	7	8	16	18	19	21	22	25	31	-
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	6.065	2.645
Gabon	84	74	13	-	-	-	-	-	-	-	-	-	-	-
Gambia	58	51	59	69	87	80	63	74	83	88	-	107	120	-
Guinea	-	-	-	-	1	2	3	2	2	1	-	17	23	16
Guinea-Bissau	2	2	2	3	28	38	-	13	-	7	17	21	17	-
Guyana	28	27	35	37	50	59	35	80	95	64	77	79	65	-
Indonesia	4.461	4.798	4.521	4.448	5.346	7.375	5.598	6.957	7.952	8.325	9.119	10.261	10.761	11.349
Iran	1.266	1.074	1.025	1.452	1.486	2.202	2.012	2.438	2.381	1.114	3.076	3.841	3.868	-
Iraq	-	-	186	170	555	-	-	1.660	1.543	1.634	-	2.489	4.060	2.423
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	4.065	4.044
Kazakhstan	638	803	801	838	1.013	1.012	963	1.005	1.209	1.347	1.522	1.467	1.534	1.549
Kuwait	328	398	413	508	530	610	354	290	319	425	298	369	499	599
Kyrgyz Republic	62	92	94	189	392	569	459	284	640	698	530	423	426	432
Lebanon	6.782	5.411	5.969	4.981	5.466	7.192	6.744	7.861	6.545	6.327	6.492	6.523	6.857	6.824
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	22.595	17.584	18.074
Maldives	402	471	287	512	602	664	608	1.713	1.868	1.951	2.333	2.696	2.569	2.730
Mali	136	142	149	175	227	286	192	283	267	142	178	212	186	-
Mauritania	-	-	-	-	-	-	-	-	-	-	48	41	37	29
Morocco	3.802	3.924	4.617	5.984	7.181	7.202	6.557	6.703	7.281	6.703	6.854	7.379	6.263	6.548
Mozambique	106	96	138	145	182	213	196	197	231	250	199	207	193	108
Niger	28	32	44	39	44	86	66	105	96	50	58	90	74	-
Nigeria	58	49	139	209	337	959	602	576	628	559	542	543	404	1070
Oman	546	414	481	544	648	804	689	780	996	1.095	1.295	1.376	1.540	-
Pakistan	620	765	828	255	276	245	272	305	373	339	288	282	317	323
Palestine	152	115	119	89	212	269	410	667	795	581	789	603	452	-
Qatar	369	498	760	874	-	-	179	584	1.170	2.857	3.456	4.591	5.035	5.411
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	10.130	11.096
Senegal	269	286	334	250	531	637	463	453	468	407	439	423	368	-
Sierra Leone	60	58	64	23	22	34	25	26	44	42	66	35	23	-
Somalia	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sudan	17	21	89	252	262	331	299	94	185	772	773	967	949	1.009
Suriname	18	52	96	109	73	83	64	61	61	71	84	95	88	64
Syria	877	2057	2130	2025	2883	3176	3757	6190	1753	-	-	-	-	-
Tajikistan	6	10	9	11	17	24	20	32	-	-	-	1	1	4
Togo	26	25	27	23	38	44	68	66	79	111	125	125	114	-
Tunisia	1.935	1.970	2.063	2.275	2.575	2.932	2.773	2.645	1.914	2.227	2.191	2.359	1.381	1.239
Turkey	-	15.888	18.152	16.853	18.487	21.951	21.250	22.585	25.054	25.653	27.997	29.552	26.616	18.743
Turkmenistan	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Uganda	185	268	382	346	398	498	667	784	960	1.135	1.334	791	1.171	768
UAE	1.438	1.593	3.218	4.972	6.072	7.162	7.352	8.577	9.204	10.380	11.564	15.221	17.481	19.496
Uzbekistan	48	57	28	43	51	64	99	121	-	-	-	-	-	-
Yemen	139	139	181	181	425	453	486	1.161	780	849	940	1.026	100	-

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

**Table 3: Travel & Tourism Economic Impact for OIC Member Countries (2016 Data)**

COMCEC	The direct contribution of Travel & Tourism to GDP	The direct contribution of Travel & Tourism to Employment (jobs) %	% of Total Employment
Afghanistan	-	-	-
Albania	8.4	7.7	26.0
Algeria	3.6	3.1	7.4
Azerbaijan	4.1	3.7	14.6
Bahrain	4.1	4.0	9.9
Bangladesh	2.2	1.8	4.3
Benin	2.4	1.9	5.8
Brunei Darussalam	1.4	2.7	7.2
Burkina Faso	1.6	1.3	3.8
Cameroon	3.7	3.1	8.1
Chad	1.3	0.9	4.1
Comoros	4.7	4.0	10.5
Cote d'Ivoire	-	-	-
Djibouti	-	-	-
Egypt	3.2	2.9	7.2
Gabon	1.1	1.0	3.1
Gambia	9.0	7.4	21.9
Guinea	2.5	1.9	5.4
Guinea-Bissau	-	-	-
Guyana	2.6	2.8	7.3
Indonesia	1.8	1.6	6.2
Iran	2.9	2.2	7.7
Iraq	1.8	1.3	5.2
Jordan	4.9	5.1	19.4
Kazakhstan	1.9	2.1	6.2
Kuwait	2.5	2.3	5.4
Kyrgyz Republic	1.4	1.3	3.9
Lebanon	7.0	6.9	19.4
Libya	3.4	2.3	7.1
Malaysia	4.7	4.5	13.7
Maldives	40.9	19.7	79.4
Mali	4.5	2.5	10.2
Mauritania	-	-	-
Morocco	8.1	7.1	18.5
Mozambique	3.6	2.9	9.3
Niger	2.3	1.9	4.9
Nigeria	1.7	1.6	4.7
Oman	3.2	3.4	7.3
Pakistan	2.7	2.3	6.9
Palestine	-	-	-
Qatar	3.4	6.5	10.1
Saudi Arabia	3.3	5.1	10.2
Senegal	4.8	4.1	11.0
Sierra Leone	1.4	1.2	3.6
Somalia	-	-	-
Sudan	2.5	1.8	5.7
Suriname	1.2	1.1	2.7
Syria	5.7	3.4	13.0
Tajikistan	3.3	9.2	8.2
Togo	3.9	3.1	8.3
Tunisia	6.6	6.0	13.7
Turkey	4.1	1.8	12.5
Turkmenistan	-	-	-
Uganda	2.6	2.2	6.6
United Arab Emirates	5.2	5.4	12.1
Uzbekistan	1.0	0.8	3.1
Yemen	2.2	1.3	5.7

Source: WTTC, Travel & Tourism Economic Impact 2016, Country Reports, 2017

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

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

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(48 OIC Member States' Reports are used including Albania, Algeria, Azerbaijan, Bahrain, Bangladesh, Benin, Brunei Darussalam, Burkina Faso, Cameroon, Chad, Comoros, Egypt, Gabon, Gambia, Guinea, Guyana, Indonesia, Iran, Iraq, Jordan, Kazakhstan, Kuwait, Kyrgyz Republic, Lebanon, Libya, Malaysia, Maldives, Mali, Mauritania, Morocco, Mozambique, Niger, Nigeria, Oman, Pakistan, Palestine, Qatar, Saudi Arabia, Senegal, Sierra Leone, Somalia, Sudan, Suriname, Syria, Tajikistan, Togo, Tunisia, Turkey, Turkmenistan, Uganda, United Arab Emirates, Uzbekistan, Yemen)