



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

**Proceedings of the 12th Meeting of the
COMCEC Tourism Working Group**

**“Destination Marketing Strategies in the OIC
Member Countries”**



**COMCEC COORDINATION OFFICE
September 2018**



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**PROCEEDINGS OF THE 12TH MEETING OF THE
COMCEC TOURISM WORKING GROUP
ON
“Destination Marketing Strategies in the OIC Member Countries”
(September 13th, 2018, Ankara, Turkey)**

**COMCEC COORDINATION OFFICE
September 2018**

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Introduction

The 12th Meeting of the COMCEC Tourism Working Group was held on September 13th, 2018 in Ankara, Turkey with the theme of "Destination Marketing Strategies in the OIC Member Countries." The Meeting was attended by the representatives of 16 Member States, which have notified their focal points for the Tourism Working Group namely Azerbaijan, Bangladesh, Burkina Faso, Egypt, Gambia, Indonesia, Iran, Lebanon, Malaysia, Mali, Maldives, Nigeria, Saudi Arabia, Senegal, Tunisia and Turkey. Representatives of the COMCEC Coordination Office, İSTKA, SESRIC, Servsci Ltd and ICVB have also attended the Meeting.¹

At the outset, the representative of the COMCEC Coordination Office informed the participants about the tourism outlook of the Member Countries. The participants considered destination marketing strategies in tourism sector through focusing on the Analytical Study titled "Destination Marketing Strategies in the OIC Member Countries" prepared for the Meeting with a view to enriching the discussions.

The participants had the chance to discuss the policy options for enhancing the cooperation in this important field during the policy debate session. The Room Document based on the findings of the Analytical Study submitted to the Tourism Working Group Meeting and the answers of the Member Countries to the policy questions sent to the Member States by the COMCEC Coordination Office were the main inputs for the discussions during moderation session.

COMCEC Coordination Office also presented the COMCEC Project Funding Mechanism and informed the participants of its details.

The Representatives of the Member States have shared their experiences, achievements and challenges regarding destination development and institutionalization strategies in tourism sector in their respective countries.

Lastly, the international institutions' perspectives and private sector efforts were also reflected to the discussions.

¹ The list of participants is attached as Annex 4.



1. Opening Session

In line with the tradition of the Organization of the Islamic Cooperation (OIC), the Meeting started with the recitation from the Holy Quran. At the outset, Mr. Selçuk KOÇ, Director at the COMCEC Coordination Office introduced the COMCEC and its activities briefly.

Dr. Azrul Anaz MOHD ANY, Expert from Islamic Tourism Centre of Malaysia, was elected as the Chairman of the Meeting. Mr. MOHD ANY introduced himself and thanked all the participants for electing him as the Chairman of the Meeting.

2. The COMCEC Tourism Outlook

Dr. Gurel CETIN, consultant from the COMCEC Coordination Office and scholar at Istanbul University, has presented some of the key developments of tourism industry in the World and in the OIC Member Countries. In his presentation, Dr. CETIN provided an overview of the importance of tourism as a socio-economic phenomena and the current state of the industry in the World and in the OIC Region.

He underlined the importance of tourism particularly for developing economies and expressed that tourism has experienced continued growth over the past eight years and become one of the most rapidly developing industries in the world. He shared various figures demonstrating that a strong tourism sector could contribute in many ways to development and the economy.

Various key tourism trends were also mentioned by Dr. Cetin such as demographic (ageing population, growing middle class and millennials) and behavioral changes (quest for authenticity and novelty, emerging destinations), advancements in technology (internet, distribution channels, sharing economy), crises and risk management (types and impacts of crises) and sustainability implications for tourism (best practices).

He then shared some figures about the current state of tourism industry in the World through displaying World arrivals and receipts between 2000 and 2017. Dr. Cetin stated that global tourism arrivals had grown from 678 million in 2000 to 1.3 billion in 2017. Dr. Cetin also provided tourism market shares of different regions related to tourism arrivals and receipts and stated Africa, Middle East and Asia Pacific regions are growing at a larger pace than the destinations in Europe and Americas.

He also compared contribution of tourism sector to the OIC member countries with those of the World averages. The OIC Member Countries have recorded 150 billion USD receipts from 187 million arrivals in 2017. Dr. Cetin also pointed out the low per tourist spending in the OIC Region. He stated that currently OIC is earning 750 USD per arrival whereas the World average is around 1000 USD. Hence he suggested that the OIC Member Countries need to focus on improving per tourist spending besides the volume in arrivals in order to increase the total value created from tourism. Top 10 destinations among the OIC member states concerning arrivals and receipts were also displayed during his presentation.

Dr. Cetin then mentioned about the current state of tourism in some member countries such as Turkey, Malaysia, Indonesia, Tunisia, Morocco, UAE, Iran, Saudi Arabia and Egypt. Finally, Dr. Çetin shared various strengths of the OIC member countries (natural, cultural and human resources, authentic experiences, competitive prices, and dynamic economies) as well as the main challenges the member countries face concerning destination planning (infrastructure,



visa facilitation, safety and security, investments) and marketing (product development and diversification, promotion and image building, service quality).

Questions & Remarks

Question: What is the role of Islamic tourism in the OIC Member Countries? What can be the future role of Islamic tourism for the advance of tourism industry in the OIC member countries?

Answer: Islamic tourism is growing and it will reach 500 billion dollars within the years according to the statistics. Muslim people are looking for proper facilities, culture and accomodation. They choose the destination according to their lifestyle. Islamic tourism will grow not only inside the OIC, but also in global tourism market. For instance, Australia and Japan are looking for opportunities, arranging conferences, trying to establish standarts.

Question: Professor Altnay asked about climate change and its impacts on the destinations, and the Silk Road regeneration and the opportunities for the member countries.

Answer: There ,s a need for arranging products in accordance with climate change. For instance, Alps was the main destination for skiing, but there is no natural snow there anymore. Switzerland is producing artificial snow to fight with climate change.

Concerning the Silk Road regeneration, since it is a well known brand, it presents many opportunities for the member countries in terms of introducing new tourism products.

3. Destination Marketing Strategies: Global Trends and Success Factors

Clive Nicolaou, Managing Director of Service Science gave this presentation. The presentation covered three main areas. Firstly, an overview of Destination Marketing in general. Secondly, the 10 key global trends identified in the report and, finally, a quick reminder of the project objectives and methodology.

The audience was reminded that destination marketing is a relatively new field, only emerging in the 1970s, but which already contains a rich resource of best practice and conceptual ideas drawn from the destination and the marketing literature. Of Particular note was:

- the evolution of the DMO towards a more general destination management organization,
- the pervasive role of technology as it impacts upon both industry and DMO operations and consumer behavior,
- the increasingly sophisticated governance of collaborative partnerships and networks of destination stakeholders in the destination marketing process.

In the second section Clive went on to identify 10 global trends in destination marketing and provided an overview of each. These were as follows:

1. Destination Competitiveness: Delivering destination competitiveness is central to the activities of DMOs and the benefits include: Securing the emotional link to, and loyalty, of visitors; Coordination of the private sector and other stakeholders through cooperative marketing; Acting as a base for promotion of other products such as investment, economic development, film, and TV; Facilitating and encouraging the use of local products and design; and Facilitating seamless market communication of the destination.

2. The Changing Role of the DMO: DMO structures vary considerably and continue to evolve; traditionally departments or agencies funded by government to market the destination but there is an emerging trend for DMOs to be structured as public private partnerships (PPPs) to assure longer term funding guarantees as well as proper accountability: Increasingly, DMOs are acting as 'management organisations' delivering 'whole of destination' management approach; Destination marketing and promotion is no longer the sole purpose of the DMO; While this modified role presents many new challenges, it also provides a much broader range of opportunities for ensuring destination competitiveness; One of these wider roles is economic development. Some DMOs have been incorporated within Economic Development Agencies.

3. DMO Governance: Over time there has been an evolutionary shift towards DMOs structured as public-private partnerships (PPP): PPPs are underpinned by recognition that; Long term funding certainty can only be provided by government; and while DMO governance



requires adequate taxpayer accountability and reporting, it is the private sector that has the expertise to efficiently and effectively oversee the management of the organisation's strategy; For DMOs working in partnership with the private sector there are a number of issues to consider. These include; The process of board member selection; and the roles and responsibilities of the board, and ethics around decision making on behalf of stakeholders. The nature of the PPP structure means politics can be a key influence in DMO decision.

4. DMO Performance Monitoring: The monitoring of DMO marketing performance has grown in importance as the accountability of public finances has become an imperative. Two approaches used to assess the effectiveness of destination marketing as outlined below: Return on Investment (ROI); Although difficult to isolate the influence of the work of the DMO Metrics for assessing the return on investment (ROI) for marketing spend include visitor numbers, visitor spending, and tax revenue; Conversion studies; These examine whether advertising increases sales. Typical examples include the effectiveness of: coupons, direct response marketing, travel trade events, brochures, promotional videos, public relations.

5. Tourism destination market planning: Provides a common point of reference for the organization acting as a coordination mechanism which is particularly important for destination marketing; It also encourages a disciplined approach to marketing by ensuring that objectives are set for markets and products, that each market has activities and resources allocated and the planning process itself sets key performance indicators (KPIs) against which performance can be monitored; There are two clear strategies on which to focus marketing effort; Mass marketing – assumes the needs of the market are all the same; Concentrated or differentiated – Identifies smaller groups within the market which have different needs. This lends itself to segmentation within the market.

6. The Tactical Level of Destination Marketing: Here, the starting point is to take the target market segments and then to use elements of the marketing mix to approach that market. With the trend to a service-dominant logic, the marketing mix can be expanded from the traditional 4 Ps to include other influencing variables such as the people involved in delivering the service, the physical setting - or servicescape – where the service is delivered and the actual process of delivering the service. The key driver of any destination marketing plan is the satisfaction of consumer needs. This has a range of benefits; Visitors are satisfied; They are more likely to return to the destination or, use the services of a specific tourism business or organization again at a different destination, and visitors are more likely to share their positive experiences either personally or through social media with other tourists.

7. Destination Marketing Funding: A key budgetary issue for DMOs is therefore getting a balance between the fixed costs of operation and spending on promotion. There are a number of options (User-pays approach; users pay for the services they use from the DMO; accommodation tax; targets visitors so bypasses local businesses; tax on business; on local

businesses based either on revenue or capital value; member subscriptions; tiered to suit business size and affordability; commercial activities; creating income streams from a DMOs activity to fund marketing campaigns; cooperative and joint venture destination marketing campaigns; managed by DMO with initial government funding + industry investment)

8. Technology in Destination Marketing: The Internet has revolutionized destination marketing, branding and image formation. It also provides a medium and delivery mechanism for consumers to gather information, make purchasing decisions and feedback. Through video, interactivity and innovations such as virtual and augmented reality, it can bring the “product” to life; Portals – On the supply side they draw together all elements of supply at the destination. On the demand side they are an interface between the consumer and the destination; Social Media – As travellers can act as co-creators of brands, destinations should engage them and strategically integrate the content they create into the destination branding effort; Mobile - The use of mobile devices is revolutionizing the way that tourists consume travel content. Based on Google Analytics data relating to US travel in 2016, 60% of destination searches were on a mobile and two thirds of the time spent watching travel videos happens on mobiles.

9. Market Research for Destination Marketing: Deep and meaningful research is the key to understanding the contemporary tourism consumer and their needs in tourism; it informs the marketer on when and how to intervene in the destination purchasing decision process and also guides them in the co-creation of their destination brands. Focus on tourism purchase decisions, rethinking the journey to purchase; Focus on perceptions of destinations; Improve the use of qualitative research and new techniques using mobile devices and social media to capture rich tracking data; Understand tourists’ perception of quality and their satisfaction with tourism experiences; Develop longitudinal research to allow temporal comparisons; Ensure that market segmentation techniques are research-led; Research tourists’ evaluation of competing products; Research cultural and geographical differences in tourism behavior; and explore the linkages between tourism consumer-behavior models and those in other sectors of the economy.

10. Collaboration and governance: A key issue for destination marketing is to ensure involvement and commitment by all stakeholders in the strategy and branding process. Collaboration can be seen to encompass four further issues which are key success factors: Creation of a shared brand to ensure that its authenticity is shared and believed in by all stakeholders. Collaboration and inclusiveness. It is essential that the destination brand is the positive outcome of the achievement of unity and collaboration amongst stakeholders. Destinations as loosely articulated networks. This involves joint decision-making with individuals and interest groups operating at different levels of the destination. Governing marketing collaboration. Implies the need for organizations operating in a destination to

share resources and access to markets in order to achieve an integrated management and delivery system, which in turn should ensure a seamless visitor experience

Having provided an overview of the 10 global trends in Destination Marketing Clive completed his presentation with explain the main objectives of the research report and the methodology employed.

The four objectives were as follows:

- Identify effective collaborative destination marketing strategies,
- The ideal structure of meta-marketing organizations and their responsibilities,
- Explore funding options and effective incentives on destination marketing efforts,
- As well as to suggest a legislative framework on how these organizations can best be empowered and audited based on empirical data, benchmarks and case destinations.

To complete the project a three-part methodology was used. Initially there was a comprehensive review and summary of destination marketing literature. This was followed by three case studies using secondary sources. The three cases used were: Canada; Turkey; United Kingdom – one OIC member state destination and two from Non-OIC countries. Finally, fieldwork was undertaken in three OIC member states: Lebanon; Mozambique; Turkey using semi-structured interviews with stakeholders and online visitor questionnaires.

Questions & Remarks

Question: Are there any levels in marketing DMO's?

Answer: Promotion of a destination can differ across national, regional and local levels. Accordingly, the instruments utilized for Destination Marketing vary at national and local levels.

4. Destination Marketing Strategies: Selected Case Studies, Main Challenges, Recommendations and Prospects

This presentation was delivered jointly by Clive Nicolaou, Managing Director of Service Science and Professor Levent Altınay, Oxford Brookes University. The agenda for the presentation was to review the findings from the three desk-based case studies along with the lessons learned. This was followed by examining the fieldwork visits and then, finally, the policy recommendations.

Clive Nicolaou provided an outline of the structure of the three case study destinations: Canada, Turkey and the United Kingdom. This highlighted the integrated approach adopted by Canada and Turkey, in contrast to the fragmented approach of the UK.

The lessons learned from each case study were then detailed. These were summarized as follows:

In Canada, all levels of tourism play a role in promoting tourism. These include the federal government, 10 province governments, the territorial governments and municipalities. The tourism vision in Canada gives importance to Steering Committee to improve Canada's tourism vision. Canada has six regional development agencies supporting local tourism investments. Destination Canada is a Canadian Crown Cooperation and wholly owned by the government of Canada, which is the lead agency for marketing.

Destination Canada works with its partners including provincial, territorial and regional destination marketing organizations. It aims to demonstrate Canada's unique attributes. It developed a long term collaborative strategy, Northstar 22, to increase tourist arrivals, tourism market share and contribute to economic prosperity.

In Turkey, at national level, the ministry of Culture and tourism is responsible for tourism. It has a range of directorates covering activities relating marketing as well as investment and conservation. The ministry has 46 Culture and Promotion Offices in 41 different countries. These offices undertake promotional marketing activities and culture and art events to promote Turkey as a tourism destination.

In provincial level, there are 1 provincial culture and tourism directorates. Local administrations and municipalities also have responsibilities for enhancing tourism industry. Istanbul Convention and Visitors Bureau (ICVB) is a good example of local organization, and the private sector is also closely involved in marketing and promotion activities in Turkey.

The key lessons from the Turkey case sheds the recognition of the importance of a "whole of government" approach to tourism reflecting a coherent approach in tourism marketing and



promotion through the establishment of tourism Councils which bring stakeholders together in an effective manner.

In United Kingdom(UK) case, there are a number of government agencies involve in tourism sector with different responsibilities. The department for digital culture media and sport is the main government body for tourism in the UK. The British tourist authority is the UK government public body responsible for tourism. Visit Britain is responsible for promoting England, Wales, London and Scotland worldwide and developing visitor economy. Visit Britain works with a range of public and private partners to grow the value about tourism.

Afterwards, Prof. Levent Altinay discussed the main findings of the fieldwork and detailed the policy recommendations. The three destinations chosen for the primary data collection were Lebanon, Mozambique and Turkey.

Professor Altinay explained the findings of the semi-structured interviews with stakeholders in the respective destinations under the following headings:

- Master plan
- Marketing and promotion
- Role of the public and private sectors
- Prospect of the destination

Starting with the key objective of the master plan, the main objective of Turkey's Tourism Strategy 2023 is place tourism into a leading industry position in regional development and enhancement of employment by the adopting a sustainable tourism approach. For Lebanon there appears to be 'no real master plan' with well-developed strategies and tactics to implement them. For Mozambique, the key objective of the country's tourism strategy is to increase the number of international visitors in the country.

Concerning marketing and promotion; advertising campaigns, image and branding activities are key components of Turkey's promotion and marketing efforts. On the other hand, for Lebanon, the key objective of the promotion and marketing is to create an image of a stable and secure destination. Mozambique's main objective is to increase the number of international visitors to the country.

The role of public and private enterprises was covered next. In Turkey, the development of tourism marketing and the tourism sector, public sector organizations and private sector companies are not equal. The development and implementation of tourism policies are carried out by the Ministry of Culture and Tourism. For this reason, the public sector is at the forefront. Private sector companies comply with the policies and practices that the ministry implements. In Lebanon there is a lack of real private-public sector partnership. In

Mozambique there is a very limited communication and coordination between private and public sectors.

The final segment of the qualitative findings was to look at the prospect of the destination. For Turkey in 2018, 40 million tourists are expected to visit. If the strategies mentioned in Turkey's Tourism Strategy 2023 and targets related to these strategies are effectively followed, it is certain to reach the targeted figures in terms of the number of tourists arrivals, tourism revenues and expenditures per-tourist. On the other hand, developments in the region affect tourism industry in Lebanon. For Mozambique, better communication and marketing is needed for improving tourism sector. For example, a new fish market has been developed but planning needs to be done to sustain this and encourage visitors.

Before concluding his presentation, Prof. Altınay mentioned about the seven policy recommendations identified in the report:

1. Long-term funding for destination marketing should be guaranteed.
2. A cohesive destination marketing strategic plan is required.
3. Collaboration between government, regional agencies and commercial organizations is critical for effective destination marketing.
4. Ring-fence resources for DMOs.
5. Facilitating and encouraging innovation in destination marketing and prioritizes digitization.
6. Promoting micro, small and medium-sized suppliers increase their competitiveness.
7. Ensuring that policies support the key drivers of demand.

Questions & Remarks

Question: If you would like to minimize the negative effect of social media, how would it be possible to manage it?

Answer: It is not appropriate to use any control or sanctions over using social media. When it comes to managing risks, it is always important to be proactive and to understand the signals of potential crises. Accordingly, it is very crucial to respond straight away to the negative signals before they turn into crises.

5. Utilizing the COMCEC Project Funding

Mr. Burak KARAGÖL, Director at the COMCEC Coordination Office made a presentation on the COMCEC Project Funding introduced by the COMCEC Strategy. The video clip shown at the outset of the presentation provided details about the rules and procedures of the COMCEC Project Funding as well as examples from the previously implemented projects.

After the video, Mr. KARAGÖL explained the timeline for the project submission and stated that the 6th Call for Project Proposals under the COMCEC Project Funding has been launched on September 1st, 2018 and will be open until the end of the September.

Mr. KARAGÖL emphasized that project topics can be found by examining; i) COMCEC policy recommendations, ii) sectoral themes, iii) outputs of the COMCEC Working Groups, iv) previous projects funded by the COMCEC, and v) COMCEC Strategy.

Then, Mr. KARAGÖL mentioned the available information on the COMCEC website regarding the COMCEC Project Funding. Mr. KARAGÖL stated that there are 6 tabs on the website namely overview, supported themes, online project submission, implemented projects, selected outputs and frequently asked questions, which can be utilized during the project submission period.

Mr. KARAGÖL shared brief information with participants regarding supported sectoral themes in tourism cooperation area. After touching upon the sectoral themes, Mr. KARAGÖL highlighted the essentials of online project submission system and reference materials that should be given an eye before submitting a project.

After briefly explaining how to reach and use the Online Project Submission System for COMCEC Project Funding, Mr. KARAGÖL also gave information on tourism projects implemented in 2018. These projects are titled “Strengthening the Resilience of Tourism Sector Against Crises through Communication”, “Training on Crisis Communication in Tourism for Selected OIC Member Countries”, “Community-Based Tourism through The Promotion of Heritage Sites for Poverty Alleviation”, “Improving Islamic Tourism Ecosystem in OIC Member Countries: Destination and Industry Development” implemented by Burkina Faso, Mali, Mozambique and SESRIC, respectively.

6. Success Stories of the Member States

6.1. Burkina Faso

On behalf of Burkina Faso, Ms. Lamoussa Rosalie BALIMA Consultant, Ministry of Culture and Tourism made a presentation on the Promotion Marketing Strategy of the BURKINA FASO Destination

At the beginning of her presentation, she explained the major axes of the marketing strategy to promote the destinations in Burkina Faso.:

- 1) Federate private actors around promotion and marketing;
- 2) Create synergies with the diaspora;
- 3) Give tools to potential investors;
- 4) Utilizing diplomatic networks;
- 5) To be able to draw inspiration from what is done elsewhere ;
- 6) Knowing how to communicate tourism in times of crisis and post-crisis;
- 7) Strengthen the capacities of the Burkinabe National Office of Tourism (ONTB), which is a state structure to promote Burkina Faso as a tourism destination.

She underlined difficulties implementing the promotion marketing strategy of the Burkina Faso destination. She expressed that the communication and promotion activities of the destination Burkina Faso require the mobilization of the necessary financial resources for this purpose. However, the budget allocated to the promotion of tourism is insufficient. She also stated that lack of qualified personnel in both private and public sectors is another important challenge for Burkina Faso. Moreover, she elaborated on very difficult security context of Burkina Faso. Since 2017 Burkina Faso, like other countries in the Sahelo-Saharan strip, is facing a very difficult security context that probably hinders the development of tourism activities.

Lastly she mentioned about the crisis communication strategy. She expressed that until recently, the Ministry of Tourism did not have a crisis communication plan. The Ministry of Tourism in collaboration with the COMCEC has been able to train a number of professionals from Burkina Faso, Côte d'Ivoire and Niger in the crisis communication strategy from 6 to 10 August 2018 in Ouagadougou.

6.2. Turkey

Mrs. İlkey Aktaş, expert from Ministry of Culture and Tourism of Turkey made a presentation on Destination Marketing Strategy in Turkey.

At the outset, she shared some figures on tourism and tourist activities in Turkey. She emphasized the key steps for monitoring of natural and cultural values of a destination:



- Problems
- Deficiencies
- Assessment of the situation
- Swot analysis
- Reporting

She continued her presentation by giving a best practice example on destination marketing namely, “Phrygian Valleys Project” with its geological structure, unique atmosphere, natural and historical texture and extraordinary properties.

She concluded her presentation by underlying other 19 hiking routes of international standards.

6.3. Iran

On behalf of Islamic Republic of Iran, Ms. Afsaneh Jaafari, Tourism Marketing and Promotion Expert in Iran Cultural Heritage, Handicraft and Tourism Organization made a presentation and shared his country experience in Destination Marketing.

At the outset, she informed the participants of Iran tourism potential. Iran has more than one million historic, cultural and natural sites as well as 23 world heritage site in UNESCO list. Iran has a great potential in health tourism. She stated that Iran also locates on the Silk Road and a member of UNWTO Silk Road project.

She continued her presentation by mentioning Iran Destination Marketing Strategies. She explained Iran’s tourism target markets. Iran has three different approaches in order to focus on the country target markets.

- Strengthening traditional markets,
- developing tourism products in accordance with target markets needs
- Developing tourism markets of Iran with an emphasis on emerging markets.

She concluded her presentation by stating that Iran has tourism information representatives in the target market countries such as Oman, Germany, Italy, Azerbaijan, Netherland, Japan, Spain, France, Hong Kong and China.

6.4. Maldives

On behalf of Republic of Maldives, Mr. Ali SHINAN Director, Ministry of Tourism of Maldives, made a presentation on tourism marketing and promotion in Maldives.

At the outset, he provided background information about the tourism developments in Maldives. He informed the participants of the Fourth Tourism Master Plan and Manifesto in

Maldives. In his presentation, he also mentioned about Sustainable Development Policies and Integrated Tourism Development projects. He continued to explain the main principles of Sustainable Development Policies as;

- Environmental Impact Assessment (EIA)
- 30% of land area developed as resort
- 5m beach for every bungalow
- No building above tree height
- Should allow equal open spaces on island for water structure

Afterwards, he mentioned about the tourism marketing and promotion activities in Maldives. In this respect, the main marketing activities are:

- Fair & Exhibitions
- Media Familiarization trips
- Digital & Social Media Marketing
- PR
- Roadshows
- Joint Promotions

Lastly, he shared some figures on Tourism Sector Performance. Tourist arrivals reached 2 million people in 2018. According to presentation, tourism sector accounted for 23.9 % of GDP of the Maldives in 2015.

7. Policy Options for Destination Marketing Strategies in the Islamic Countries

The session was moderated by Dr. Azrul Anaz MOHD ANY, Expert from Islamic Tourism Centre of Malaysia. At the outset, Mr. MOHD ANY stated that the Room Document, prepared by the COMCEC Coordination Office in light of the findings of the analytical study prepared specifically for the Meeting and the answers of the Member Countries to the policy questions which have already been sent by the CCO, would serve as the basis for the discussions in the moderation session.

At the beginning of the session, Mr. Selçuk KOÇ, made a brief presentation on the responses of the Member Countries to the policy questions on destination marketing strategies. After presenting the questions and responses of the Member Countries, he introduced the Room Document including draft policy advices.

After the presentation, Mr. MOHDY ANY gave the floor to all delegations asking their opinions and comments for each policy advices as well as the experience of their respective countries in this regard. Based on intensive deliberations, the participants agreed on the policy advices given in the attached room document to be submitted to the 34th Session of the COMCEC as an outcome of the 12th Meeting of the Tourism Working Group.

The policy recommendations highlighted by the participants are as follows:

- Establishing/Empowering a central body (i.e. DMO) to position the destination at a desirable place among the competing destinations, to create the brand image of the destination, and to promote the destination through utilizing such tools as social media, digital marketing, trade fairs, public relations, and fam-trip organizations.
- Encouraging new product development (i.e. events, festivals and other suitable products) to mitigate the adverse effects of seasonality and the risks related to dependence on one product or a single market.
- Managing and regulating existing distribution channels, developing new distribution channels to prevent dependency and minimize power asymmetry between destination stakeholders as well as international intermediaries, and establishing strategic alliances with external stakeholders that would create synergies for the destination and other collaborators (i.e. airlines, event organizers etc).
- Promoting collection, storage, analyses and dissemination of market data on visitor characteristics, seasonality, distribution channels performance, source markets, trends etc., while respecting confidentiality and privacy of individuals, to improve the marketing effectiveness of the destination stakeholders as well as DMOs.
- Utilizing digital platforms, mobile applications and allocating special attention on social media channels for improving tourist experience, information credibility and interaction among visitors in destination marketing

8. International Institutions’/ Private Sector’s Perspective

8.1. İstanbul Development Agency

Ms. Özgül ÖZKAN YAVUZ, Secretary General made a presentation about “İstanbul 2010 European Capital of Culture Programme: Culture As a Tool for Destination Marketing”.

At the outset, she mentioned history of İstanbul. According to this presentation, along its history of eight thousand five hundred years, İstanbul became capital to many civilizations and accumulated various lives, experiences and memories. By 2010 we got the chance altogether to witness a year that will mark the history of İstanbul as the European Capital of Culture (ECoC).

She informed that Council of the Ministers of Culture of the EU approved the selection of İstanbul as European Capital of Culture 2010 on 13 November 2006. A bottom-up approach initiated by civil society and a ‘governance model’ that was coordination between governmental bodies, private sector and NGOs. Turkish Parliament has enacted a special law for the foundation of an Agency for İstanbul 2010 ECoC in November 2007.

She also emphasized the main goals of the İstanbul 2010 ECoC Programme were rehabilitation & promotion of cultural heritage of İstanbul, promotion of cultural-artistic activities & creative capacity of İstanbul, increasing networking between artists, NGOs of Turkey and the World, contributing to become a prominent cultural tourism destination, increasing intercultural dialogue, involving young people and reaching out the city.

She continued her presentation by giving Programme concentrates on three main areas:

- Art and culture,
- Urban projects and the protection of cultural heritage,
- Tourism and promotion.

In terms of destination marketing the target was to present the unique cultural inheritance of İstanbul and the city’s creative cultural capacity as a marketable product and to develop cultural tourism opportunities. 2010 ECoC Programme aimed to reposition the city with an enhanced image.

Although İstanbul was already a metropolis of tourism for centuries; I strongly believe that European Capital of Culture projects further enhanced the position of İstanbul to gain an impetus among the prominent cultural destinations in the world.

The most important issue is not only preparing the city for this title but also preparing people living in İstanbul and making them aware of the potential good of this prestigious title. From this point of view as İstanbul 2010 ECoC Agency we have launched a strong advertising campaign throughout the country to say that year 2010 will be the year of İstanbul.

With this strategy and more than 600 projects that dignifies our perspective, in 2009, we have launched advertising campaign both locally and globally in 2009. Our advertisement campaign, which will contribute to the brand value of Istanbul with its self-confident and dignified stand, run in most important European cities. Magical silhouette of Istanbul takes place in most important centers of the world, almost like a source of inspiration source.

Actually İstanbul 2010 ECoC aims both to show the city to world as the “most inspiring city in the world” and to bring the world to the city. The message here was International, assertive statement, not a claim but a promise, clear and distinguishing, exciting and activating. The communication channels were metropolitan outdoors, airports, train stations, airline companies, international niche magazines (Time, Wallpaper, Geo, National Geographic etc.), internet sites (portals, traveling sites, city life sites, international newspapers, social media etc.), opinion leaders print media (arts and culture pages, Le Monde, Die Zeit, NYT...) and TV Channels (BBC World, CNN).

Istanbul 2010 ECoC Agency have welcomed and arranged interviews at İstanbul 2010 Agency with more than international 300 journalists and organised press trips and press meetings abroad. New promoting and marketing materials have been created such as audioguide, cultural city maps and Istanbul visitors guide.

She concluded her presentation by underlying at the end of İstanbul 2010 ECoC Programme the image of İstanbul changed a lot, İstanbul was not only a touristic place but also a lively cultural destination with the help of our strong marketing campaign. They worked to create a memorable European Capital of Culture year for the most inspiring city in the world: İSTANBUL.

8.2. İstanbul Convention and Visitor Bureau (ICVB)

Ms. Ferah Fatma KOCADON, Conventions Expert from İstanbul Convention and Visitor Bureau (ICVB), made a presentation on “Destination Marketing Experience of ICVB”.

At the outset, she informed the participants about ICVB, Istanbul as a congress destination and how they promote the city, and provided some congress statistics of Istanbul. ICVB was established in 1997 as the first official destination marketing organization of Turkey. Their supporters are Istanbul Chamber of Commerce, Turkish Ministry of Culture and Tourism, The Governorship of Istanbul, Istanbul Metropolitan Municipality, Association Of Turkish Travel Agencies, Touristic Hotels And Investors Association And Turkish Airlines. She explained their bureau has been working effectively on promoting Istanbul as an international congress destination. She continued her presentation by mentioning about their complimentary services. In order to attract international congresses and meetings to the city the followings are the summary of their supports; Bid support, venue finding, consulting & advice, site inspections, promotional materials and from marketing & PR support to mobile applications.

Afterwards, she highlighted that with its 8.500 years of rich history, Istanbul has been the capital of three great empires and connecting Europe and Asia. It's the only city in the world bridging the two continents. She also mentioned that the City is a knowledge Hub, having over 60 universities and 11 techno parks. Istanbul is easily accessible from around the world. 1.5 billion People live within a 4 hours flight of the City. At this point, she expressed that the direct support of Turkish Airlines is worth mentioning, connecting Istanbul to 5 continents and over 300 destinations directly. In addition, the e-visa system made visa procedures easier. Istanbul also offers over 112,000 beds for visitors.

She stated that Istanbul CVB has many international activities to promote the city. They are attending many congress, tourism fairs and roadshows to showcase Istanbul. They are also working to build Istanbul's image. For this, they are focusing on press visits, marketing and PR campaigns, social media campaigns.

Moreover, she elaborated on the role of digital world. She expressed that all updated information about Istanbul can be found from the official website of Istanbul which has been supported by Istanbul Development Agency. Social media is also a very important channel for realizing the targets. She underlined, in 2017, Istanbul hosted 143 international congresses with over 114,775 delegates. The top 3 subjects are medical sciences, education and social sciences. Furthermore, in 2017, Istanbul has hosted 163 national congresses with almost 35.000 delegates in the fields of medical sciences, technology and economics.



9. Closing Remarks

The Meeting ended with closing remarks of Dr. Azrul Anaz MOHD ANY, Expert from Islamic Tourism Centre of Malaysia and Chairman of the Meeting and Mr. Selçuk KOÇ, Director in the COMCEC Coordination Office.

In his remarks, Mr. MOHD ANY thanked all the Member Countries for giving her the opportunity to chair this session. She also thanked all the participants, presenters for their invaluable contributions, comments and ideas presented during the discussions.

Mr. Selçuk KOÇ also thanked all the participants for their invaluable contributions. He underlined that the observations and comments of the participants on the analytical study prepared specifically for the Tourism Working Group Meetings would be mostly welcome in order to improve its quality. He also stated feedbacks about the main output of the meeting, the draft policy recommendations which will be presented to the 34th Session of the COMCEC, would be very valuable. Mr. KOÇ also highlighted the importance of COMCEC Project Funding and invited the Member Countries as well as the relevant OIC Institutions to submit project proposals to benefit from this important asset.

Mr. KOÇ also informed the participants that the next (13th) Meeting of the Tourism Working Group will be held on February 13th, 2019 in Ankara with the theme of “sustainable Destination Management Strategies in the OIC Member Countries.”

Annex 1: Agenda of the Meeting



12th MEETING OF THE COMCEC TOURISM WORKING GROUP (September 13th, 2018 Ankara)

“Destination Marketing Strategies in the OIC Member Countries”

AGENDA

Opening Remarks

1. The COMCEC Tourism Outlook
2. Destination Development and Institutionalization Strategies: Global Trends, Approaches and Success Factors
3. Destination Development and Institutionalization Strategies in the OIC Member Countries: Current Situation, Main Challenges, Recommendations
4. Policy Options for Destination Development and Institutionalization Strategies in the OIC Member Countries
5. Member State Presentations
6. International Institutions’/ Private Sector’s Perspective
7. Utilizing the COMCEC Project Funding

Closing Remarks

Annex 2: Program of the Meeting



12th MEETING OF THE COMCEC TOURISM WORKING GROUP

(September 13th, 2018, Crowne Plaza Hotel, Ankara)

“Destination Marketing Strategies in the OIC Member Countries”

PROGRAMME

08.30-09.00	Registration
09.00-09.05	Recitation from the Holy Quran
09.05-09.15	Opening Remarks
	The COMCEC Tourism Outlook
09.15-09.35	- <i>Presentation: Assoc. Prof. Gürel ÇETİN Consultant COMCEC Coordination Office (CCO)</i>
09.35-09.45	- <i>Discussion</i>
	Destination Marketing Strategies: Global Trends and Success Factors
09.45-10.15	- <i>Presentation: Mr. Clive Nicolaou Managing Director Servsci Ltd</i>
10.15-10.45	<i>Discussion</i>
10.45-11.00	<i>Coffee Break</i>
	Destination Marketing Strategies: Selected Case Studies, Main Challenges, Recommendations and Prospects
11.00-11.40	- <i>Presentation: Prof. Levent Altınay Servsci Ltd</i>
11.40-12.20	- <i>Discussion</i>
12.20-14.00	<i>Lunch</i>

Policy Options for Destination Development Marketing Strategies in the Member Countries

There will be a moderation session under this agenda item. The participants are expected to discuss the policy options/advices on destination marketing strategies in the OIC Member Countries. At the beginning of the session, the CCO will make a short presentation on the responses of the Member Countries to the policy questions and the Room Document.

- 14.00-14.10 - Presentation: “*Responses of the Member Countries to the Policy Questions on destination marketing strategies*”
Mr. Selçuk KOÇ
Director
COMCEC Coordination Office (CCO)

- 14.10-15.30 - *Discussion*

Utilizing the COMCEC Project Funding

- 15.30-16.00 - *Presentation: Mr. Burak KARAGÖL*
Director
COMCEC Coordination Office (CCO)

- 16.00-16.15 - *Discussion*

16.15-16.30 *Coffee Break*

Success Stories of the Member States

- 16.30-17.30 - *Presentation(s)*

- *Discussion*

International Institutions’/Private Sector’s Experiences

- 17.30-17.45 - *Presentation: “İstanbul 2010 European Capital of Culture Programme: Culture As a Tool for Destination Marketing”*
Ms. Özgül ÖZKAN YAVUZ
Secretary General
İstanbul Development Agency

- 17.45-18.00 - *Presentation: “Destination Marketing Experience of ICVB”*
Ms. Ferah Fatma KOCADON
Conventions Expert
Istanbul Convention and Visitor Bureau (ICVB)

- 18.00-18.15 - *Discussion*

18.15-18.25 *Closing Remarks and Family Photo*

Annex 3: The Policy Recommendations

THE POLICY RECOMMENDATIONS HIGHLIGHTED BY THE 12TH MEETING OF THE TOURISM WORKING GROUP

The COMCEC Tourism Working Group (TWG) has successfully held its 12th Meeting on September 13th, 2018 in Ankara, Turkey with the theme of “Destination Marketing Strategies in the OIC Member Countries.” During the Meeting, Tourism Working Group, made deliberations on destination marketing strategies in the OIC Member Countries in tourism sector. Accordingly, the participants has come up with some policy recommendations.

Policy Advice 1. Establishing/Empowering a central body (i.e. DMO) to position the destination at a desirable place among the competing destinations, to create the brand image of the destination, and to promote the destination through utilizing such tools as social media, digital marketing, trade fairs, public relations, and fam-trip organizations.

Rationale:

Destinations are composed of different stakeholders and posses different tangible and intangible resources. Tourist create their own experiences by interacting with these stakeholders and resources, thus every destination might offer different experiences and have some characteristics that might help compete other destinations. As dynamic systems, destinations require complex and sophisticated structures to design and implement their marketing strategies. Such a holistic view of destination marketing can be available at national (NTO) and regional (DMO) tourism organizations. In order to use their competitive advantages, destinations need a holistic approach in identifying these resources, converting them into products and unique selling propositions. A DMO can also create a marketing communications strategy and brand image for itself while matching these resources and desirable target markets.

Because the destination offers an overall experience, individual experiences with stakeholders and their marketing communications should also be aligned and consistent with the position of the destination and its brand image. Once the shared image is created it should be reinforced consistently by joint marketing activities such as Fam-trips, attendance to fairs and exhibitions, advertorial in traditional media, social marketing and web presence. Public relations activities (e.g. international news and event) should also support the shared brand vision of the destinations. In addition to their own marketing efforts, DMOs should also encourage individual marketing efforts of the stakeholders such as offering a percentage of selected marketing activities (e.g. attendance to fairs).

Policy Advice 2. Encouraging new product development (i.e. events, festivals and other suitable products) to mitigate the adverse effects of seasonality and the risks related to dependence on one product or a single market.

Rationale:

The products and services offered at the destination and their quality are major factors that satisfy or dissatisfy tourists. Considering the importance of their loyalty and their potential in promoting the destination, it is important to design the products based on the needs and expectations of target markets. Destinations should be selective in targeting rather than trying to be everything for every one. On the other hand, while doing this, destinations should not focus on only one market but rather on various suitable markets. In this framework, based on tangible and intangible resources at the destination (e.g. alternative tourism, events and festivals), the products and services provided need to attract different tourist markets, thus the seasonality and possible negative impacts of crises can be minimized.

Policy advice 3. Managing and regulating existing distribution channels, developing new distribution channels to prevent dependency and minimize power asymmetry between destination stakeholders as well as international intermediaries, and establishing strategic alliances with external stakeholders that would create synergies for the destination and other collaborators (i.e. airlines, event organizers etc).

Rationale:

Many destinations in the OIC Region are too much dependent on international tour operators and intermediaries (e.g. booking.com). Due to this dependency and in the absence of a representative body to organize and regulate collective responses of stakeholders against these distribution channels, these international platforms can try to improve their position and profits at the expense of the destination itself. Thus, DMOs can regulate stakeholders and set price bases as well as ceilings for commission rates. Besides, DMOs would also empower local and regional intermediaries and promote direct reservations by introducing new distribution channels along with destination webpages. DMOs might also establish strategic alliances with external stakeholders such as airlines (e.g. joint promotion, lower landing fees), event and festival organizers (i.e. venue provision), production companies (e.g. movie sponsorships) to pull direct demand to the destination.

Policy Advice 4. Promoting collection, storage, analyses and dissemination of market data on visitor characteristics, seasonality, distribution channels performance, source markets, trends etc., while respecting confidentiality and privacy of individuals, to improve the marketing effectiveness of the destination stakeholders as well as DMOs.

Rationale:

Tourists provide remarkable information and data for the destination starting from the reservation process, to customs, location based services, credit card expenditures, satisfaction surveys and so on. Yet, the information collected by individual stakeholders is not usually effectively used, because majority of the OIC destinations do not provide the necessary infrastructure to upload and import these data from individual suppliers. On the other hand, this data is invaluable to create a central marketing intelligence about the characteristics of demand, the image of the destination, quality of the products, visitor loyalty and recommendation etc. Thus a central data collection and processing unit can also be suggested at the destination level.

Policy Advice 5. Utilizing digital platforms, mobile applications and allocating special attention on social media channels for improving tourist experience, information credibility and interaction among visitors in destination marketing

Rationale:

Internet has dramatically changed destination marketing, branding and image formation and rapidly emerging digital economy is challenging the relevance of the existing marketing practices. Digital platforms have become widely used instruments in destination marketing. DMOs use internet as a central part of their marketing strategy. In this respect, there is a need to adopt digital marketing approaches and improve the capacity of the relevant personnel in this new area. Social media platforms, which emerged as dominant digital communications channels as tourists increasingly engage with destinations on mobile devices, can also be utilized for this purpose.

Instruments to Realize the Policy Advices:

- **COMCEC Tourism Working Group:** In its subsequent meetings, the Working Group may elaborate on the above-mentioned policy areas in a more detailed manner.
- **COMCEC Project Funding:** Under the COMCEC Project Funding, the COMCEC Coordination Office calls for projects each year. With the COMCEC Project Funding, the Member Countries participating in the

Working Groups can submit multilateral cooperation projects to be financed through grants by the COMCEC Coordination Office. For the above-mentioned policy areas, the Member Countries can utilize the COMCEC Project Funding and the COMCEC Coordination Office may finance the successful projects in this regard. These projects may include organizing seminars, training programs, study visits, exchange of experts, workshops and preparing analytical studies, needs assessments and training materials/documents.

- **OIC/COMCEC Private Sector Tourism Forum:** In its future meetings, the OIC/COMCEC Private Sector Tourism Forum may elaborate on the above-mentioned policy areas and the sub-areas from the private sector perspective.



Annex 4: List of Participants

LIST OF PARTICIPANTS 12th MEETING OF THE TOURISM WORKING GROUP 13 September 2018, Ankara

A. MEMBER COUNTRIES OF THE OIC

REPUBLIC OF AZERBAIJAN

- Mr. AZER ORUJOV
Consultant, Ministry of Culture and Tourism
- Ms. FIDAN ALIYEVA
Director, Azerbaijan Tourism Board

PEOPLES REPUBLIC OF BANGLADESH

- Mr. MOHAMMAD MAHBUBUR RAHMAN BHUIYAN
Deputy Secretary, Ministry of Civil Aviation and Tourism

BURKINA FASO

- Ms. LAMOOUSSA ROSALIE BALIMA
Consultant, Ministry of Culture and Tourism
- Ms. MARIAM TRAORE
Director, Ministry Of Culture and Tourism

ARAB REPUBLIC OF EGYPT

- Mr. AMR SELIM
Counsellor, Embassy of Egypt in Ankara

REPUBLIC OF GAMBIA

- Mr. ALAGIE LAYE
Manager, Gambia Tourism Board
- Ms. DIMINGA SENGHORE
Corporate Affairs Management, Gambia Tourism Board

REPUBLIC OF INDONESIA

- Mr. HENDRO SUTYONO
Officer, Ministry of Tourism
- Mr. ANI INSANI
Analyst, Ministry of Tourism

- Ms. DEA NOVIA PRADITHA
Officer, Ministry of Tourism

ISLAMIC REPUBLIC OF IRAN

- Ms. AFSANEH JAAFARI
Senior Expert, Marketing and Promotion Bureau
- Ms. MASOUMEH ALLAHVERDI
Senior Expert, Iran Cultural Heritage, Handicrafts and Tourism Organization

REPUBLIC OF LEBANON

- Mr. GHASSAN MOALLEM
Ambassador, Embassy of Lebanon in Ankara
- Mr. MUHAMMED FADIL EL-IMADI
Administrative Staff, Embassy of Lebanon in Ankara

MALAYSIA

- Dr. AZRUL ANAZ MOHD ANY
Expert, Ministry of Tourism and Culture
- Ms. FIRNA AZURA EKAPUTRI MARZUKI
Assistant Secretary, Ministry of Tourism and Culture

REPUBLIC OF MALDIVES

- Mr. ALI SHINAN
Director, Ministry of Tourism
- Ms. SHAKEEBA HUSSAIN
Deputy Managing Director, Maldives Integrated Tourism Development Corporation

REPUBLIC OF MALI

- Mr. SIDY KETIA
Coordinator, Ministry of Tourism

FEDERAL REPUBLIC OF NIGERIA

- Ms. HALIMATU SODANGI SANI
Assistant Director, Federal Ministry of Information and Culture

KINGDOM OF SAUDI ARABIA

- Mr. SALEH ABDULHADI
Assistant Director, Federal Ministry of Information and Culture

REPUBLIC OF SENEGAL

- Mr. SOULEYMANE SAMB
Coordinator, Ministry of Tourism

REPUBLIC OF TUNISIA

- Mr. LEITH BEN ZAKOUR
Head of Service, Tunisia Tourism Office

REPUBLIC OF TURKEY

- Mr. RAMAZAN ÇOKÇEVİK
Head of Department, Ministry of Culture and Tourism
- Ms. BAŞAK ÖNSAL DEMİR
Coordinator, Ministry of Culture and Tourism
- Mr. ENİS UĞUR
Expert, Ministry of Culture and Tourism
- Mr. ERKUT ATALAR
Expert, Ministry of Culture and Tourism
- Mr. EYYUP BULUT
Expert, Ministry of Culture and Tourism
- Mr. HÜSEYİN ES
Expert, Ministry of Culture and Tourism
- Mr. MUSTAFA SARIŞEN
Expert, Ministry of Industry and Technology
- Mr. GÜRSEL GÜNDOĞDU
Expert, Ministry of Culture and Tourism
- Ms. ZEYNEP ASLAN
Expert, Ministry of Culture and Tourism
- Ms. İLKAY AKTAŞ
Computer Operator, Ministry of Culture and Tourism
- Ms. YASEMİN ÇELİK
Translator, Ministry of Culture and Tourism

B. THE OIC SUBSIDIARY ORGANS

STATISTICAL, ECONOMIC, SOCIAL RESEARCH AND TRAINING CENTER FOR ISLAMIC COUNTRIES (SESRIC)

- Mr. CEM TİNTİN
Senior Researcher

C. INVITED INSTITUTIONS

İSTANBUL DEVELOPMENT AGENCY (İSTKA)

- Ms. ÖZGÜL ÖZKAN YAVUZ
Secretary General

THE ISTANBUL CONVENTION & VISITORS BUREAU (ICVB)

- Ms. FERAH FATMA KOCADON
Expert

SERVSCI LTD

- MR. CLIVE NICCOLAU
Managing Director
- MR. LEVENT ALTINAY
Professor

D. COMCEC COORDINATION OFFICE

- Mr. SELÇUK KOÇ
Head of Department
- Mr. BURAK KARAGÖL
Head of Department
- MEHMET ASLAN
Head of Department
- Mr. GÜREL ÇETİN
Consultant
- Mr. GÖKTEN DAMAR
Expert
- Ms. AYTEN KAÇAR
Expert
- Mr. FATİH ASLAN
Expert
- Mr. CANER UYANIK
Expert