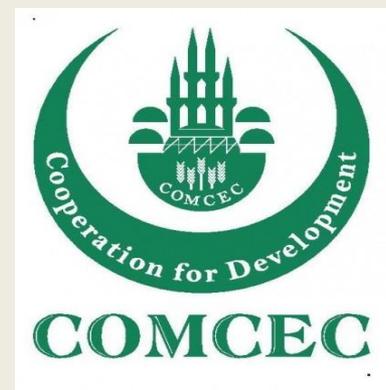


Strategic Roadmap for Development of Islamic Tourism in OIC Member Countries



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

ORGANIZATION OF ISLAMIC COOPERATION (OIC)

**DR. CEM TINTIN,
RESEARCHER**

**Training Programme on the Development and Promotion of
Muslim Friendly Tourism (MFT) in COMCEC Member Countries,
4-7 July 2017, Ankara, Turkey**

Outline

- I. Highlights on International Tourism Worldwide**
- II. Highlights on International Tourism in OIC Member Countries**
- III. Islamic Tourism in OIC Member Countries**
- IV. Strategic Plan for the Development of Islamic Tourism in OIC Member Countries**
- V. Concluding Remarks and Policy Recommendations**

I.
Highlights
on International Tourism
Worldwide

2015

- International tourist arrivals grew by 4.6% in 2015 to 1,184 million.
- International tourism receipts earned by destinations hit US\$ 1260 billion.
- International tourism generated US\$ 1.5 trillion in export earnings.

2016

- International tourist arrivals grew by 3.9% to reach a total of 1,235 million.
- 2016 was the **seventh** consecutive year of sustained growth following the 2009 global economic and financial crisis.
- By 2030, UNWTO forecasts international tourist arrivals to reach 1.8 billion.

2016

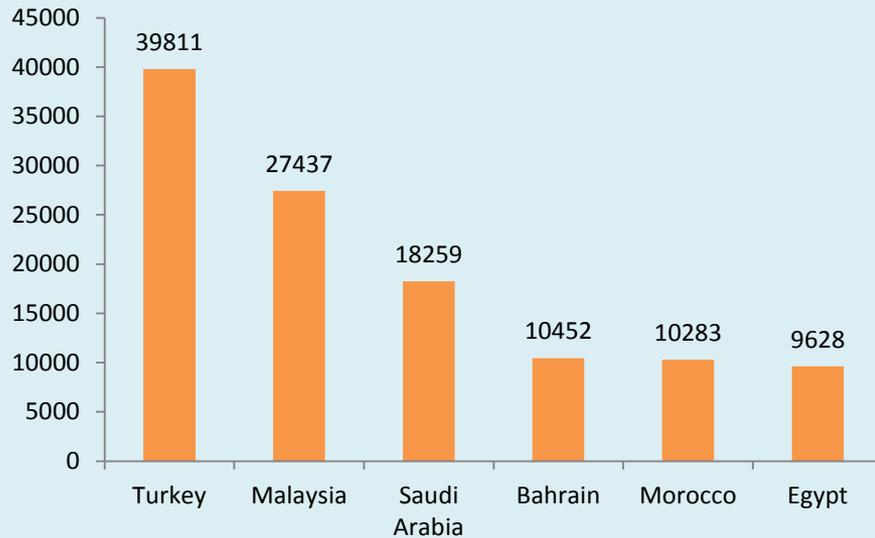
- **Asia and the Pacific (+8%)** led growth in international tourist arrivals in 2016.
- **Africa (+8%)** enjoyed a strong rebound after two weaker years.
- In the **Americas (+4%)** growth was robust.
- **Europe (+2%)** showed rather mixed results, with double-digit growth in some destinations offset by decreases in others.
- Demand in the **Middle East (-4%)** was also uneven, with positive results in some destinations, but declines in others.

II.
Highlights
on International Tourism in
OIC Member Countries

Three stylized facts:

- ❑ The annual average growth rate of tourist arrivals was measured as 2.2% between 2009 and 2013.
- ❑ The annual average growth rate of tourism receipts was measured about 3.5% in this period.
- ❑ On average, the growth of the sector tends to stay steady and far below its potential.

Top 5 OIC Tourism Destinations (arrivals in thousands)



- Turkey and Malaysia were two leading OIC countries in terms of tourism receipts.

- Turkey and Malaysia hosted the highest number of tourists in the OIC group in 2014.

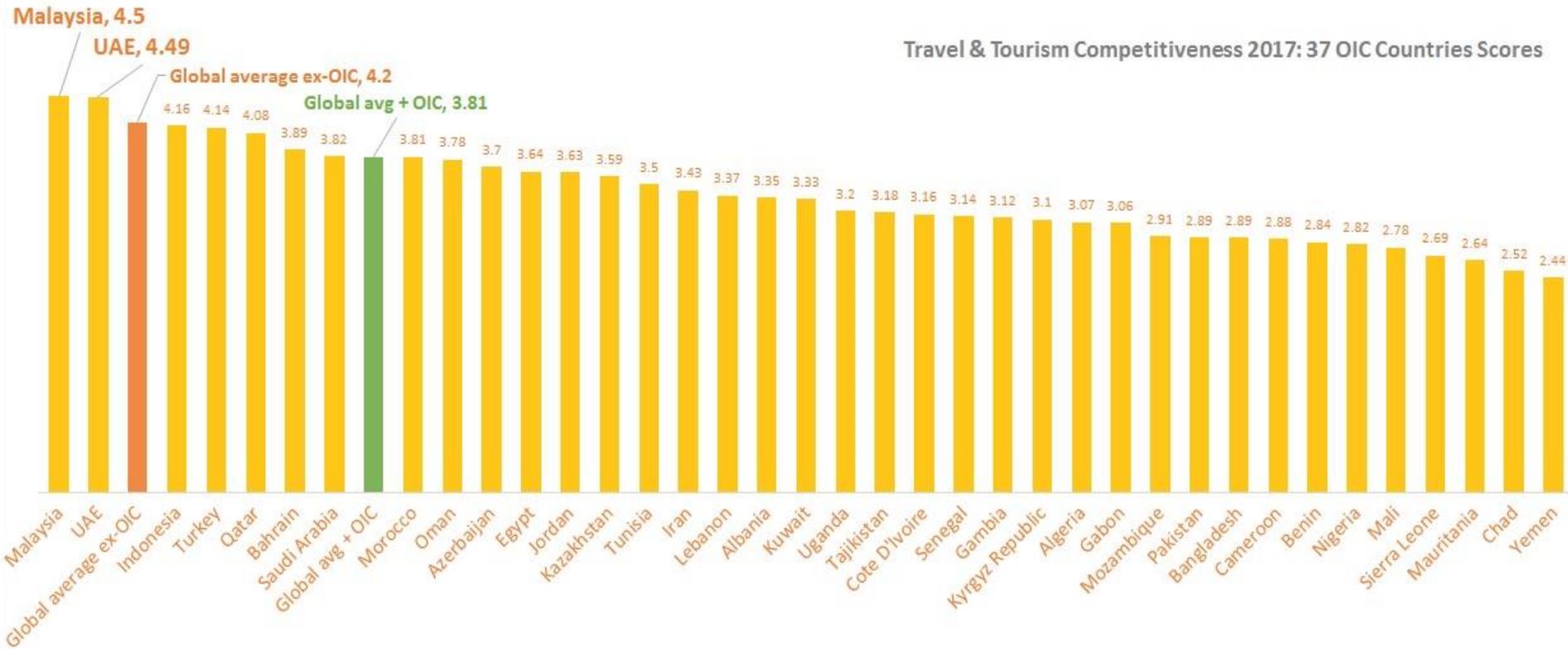
Top 5 OIC Tourism Earners (receipts in US\$ Millions)



Competitiveness of OIC Countries in Travel and Tourism, 2017

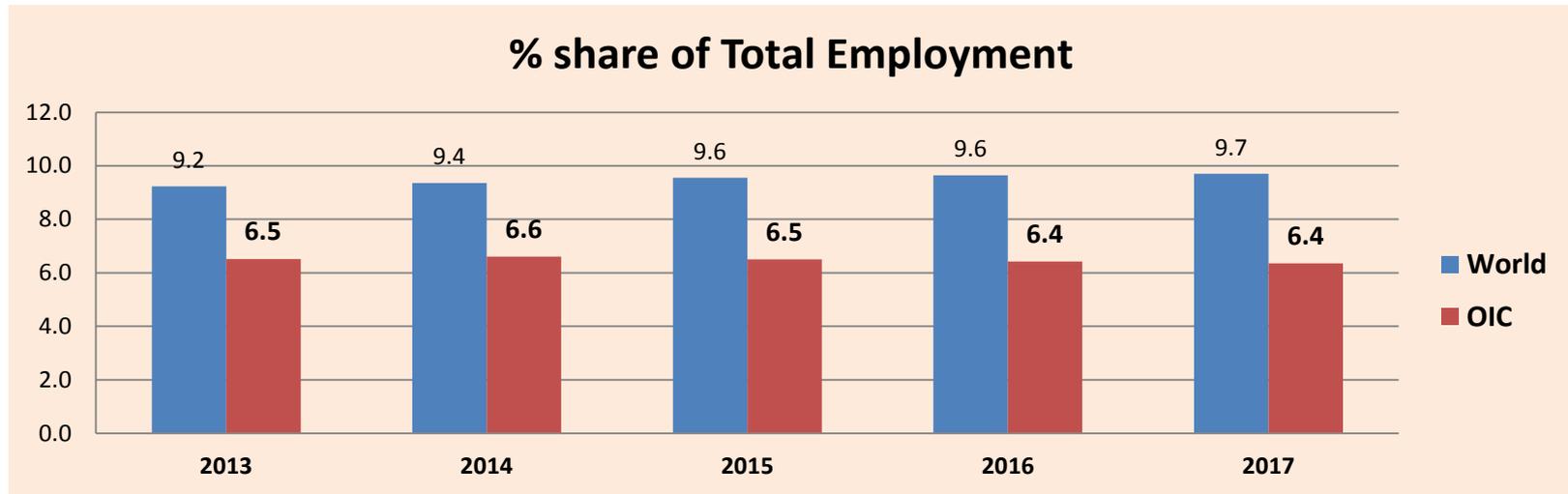


Travel & Tourism Competitiveness 2017: 37 OIC Countries Scores

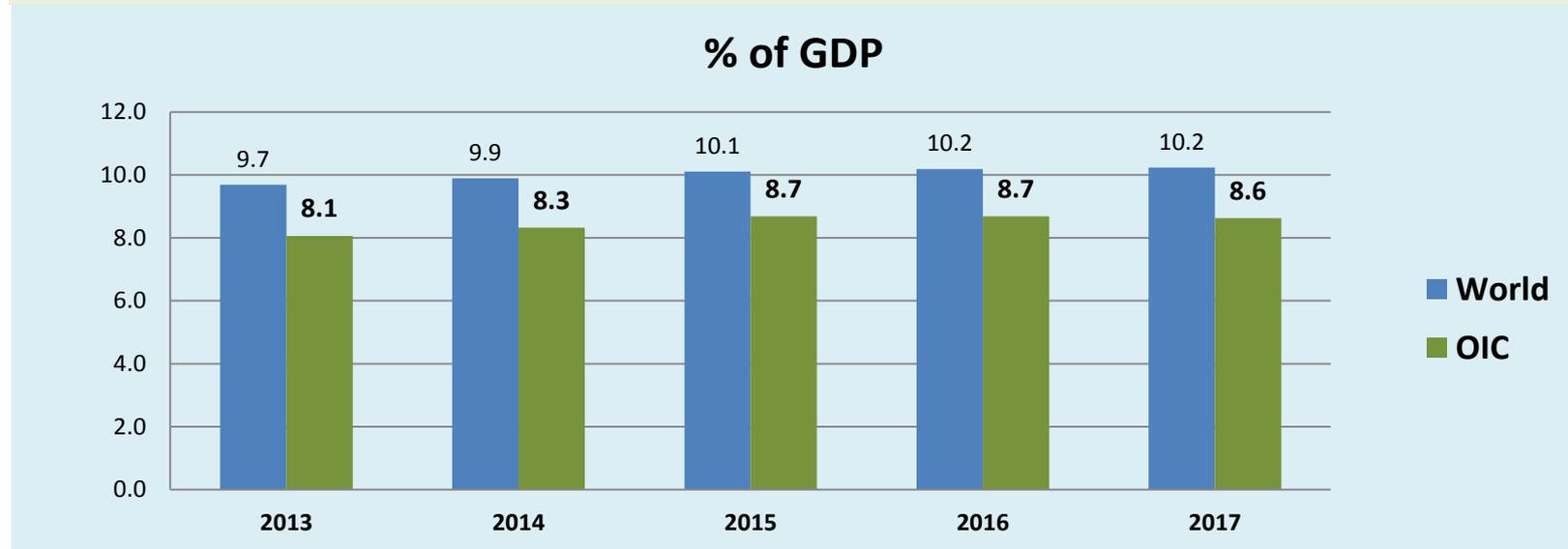


- ❑ WEF 2017 index on travel and tourism competitiveness takes into account 14 factors from safety & security to tourist service infrastructure.
- ❑ According to 2017 index, only Malaysia and United Arab Emirates exceed the global average of 4.2 among data available OIC countries.
- ❑ The results suggest that vast majority of OIC countries need significant improvements in order to become more competitive in the global tourism market.

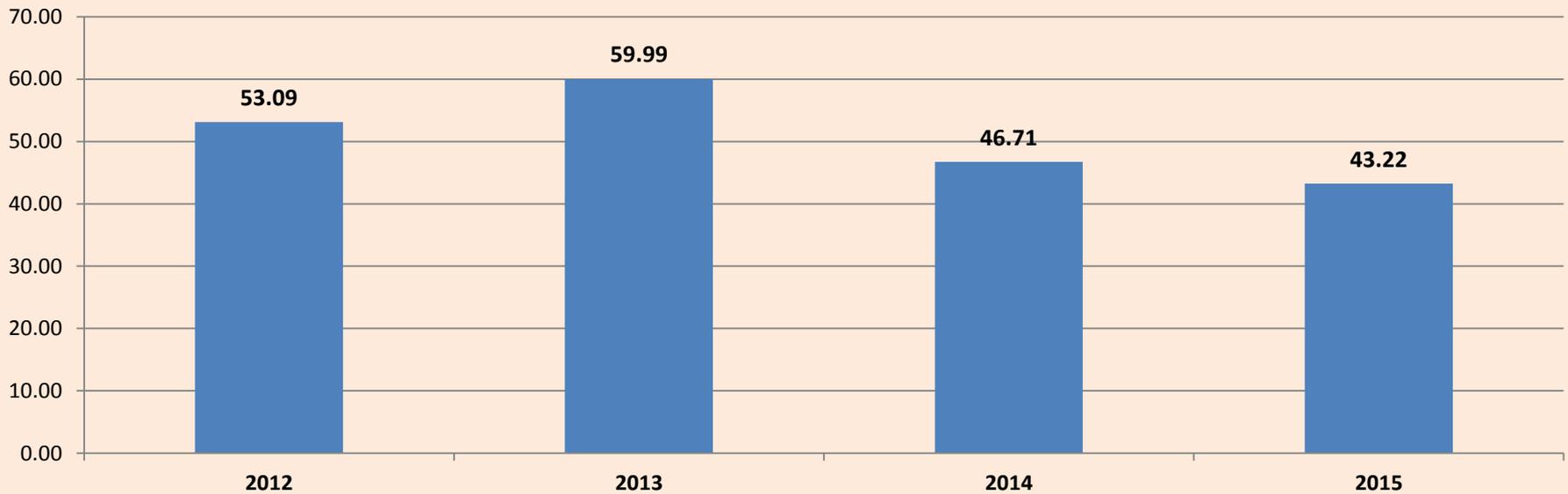
1) Total Contribution to Employment



2) Total Contribution to GDP



Intra-OIC Tourist Arrivals (millions)



- ❑ There was a gradual decline in the Intra-OIC tourist arrivals between 2013 and 2015.
- ❑ Intra-OIC tourist arrivals accounted for about **one-third** of the total tourists arrivals in OIC between 2013 and 2015.

- ❑ In line with the decrease in the intra OIC tourist arrivals, intra-OIC tourism receipts also went down between 2013 and 2015.

III.
Islamic Tourism
in
OIC Member Countries

- ❑ Over the two last decades, demand for Sharia'h compliant products and services increased tremendously all across the world including the OIC countries.
- ❑ In this context, Halal Hotels, Halal Food Premises, Halal Tour Packages, and Halal Transport (airlines) became components of Islamic Tourism.



- ❑ The Muslim tourism market has witnessed rapid growth over the years and emerged as one of the fastest growing segments of the global tourism market.
- ❑ Its growth rate has been consistently found to be higher than the conventional tourism market.

- ❑ Muslim tourism market (excluding the Hajj and Umrah expenditures of \$20 to \$25 billion) increased from around \$80 billion in 2006 to **\$145 billion in 2014**, corresponding to an impressive increase of 81 per cent.
- ❑ The size of the global Islamic tourism market further grew by **4.9** per cent reached \$151 billion in 2015. Developing and expanding Halal tourism and capitalizing on its potentials can play a significant role in the socio-economic development of many OIC countries.
- ❑ **Major Challenges remain unaddressed:** Lack of coordination among public institutions, standards and certification issues, underdeveloped national rules and regulations, ineffective marketing and promotion strategies, problems on data and monitoring.

Top Performer Countries in the Global Muslim Travel Index



GMTI 2015 Rank	OIC Destination	Score	GMTI 2015 Rank	Non-OIC Destination	Score
1	Malaysia	83.8	9	Singapore	65.1
2	Turkey	73.8	20	Thailand	59.2
3	United Arab Emirates	72.1	25	United Kingdom	55
4	Saudi Arabia	71.3	30	South Africa	51.1
5	Qatar	68.2	31	France	48.2
6	Indonesia	67.5	32	Belgium	47.5
7	Oman	66.7	33	Hong Kong	47.5
8	Jordan	66.4	34	USA	47.3
10	Morocco	64.4	35	Spain	46.5
11	Brunei	64.3	36	Taiwan	46.2

Source: MasterCard and Crescent Rating (2015)

IV.

Strategic Plan for the Development of Islamic Tourism in OIC Member Countries

- Indonesia hosted the OIC's First International Forum on Islamic Tourism in Jakarta in 2014.
- At the 9th Islamic Conference of Tourism Ministers held in Niamey, Republic of Niger on 21-23 December 2015 adopted a Resolution on Development of Islamic Tourism among the OIC Member Countries.
- In pursuance of this resolution, a working group led by Indonesia was established and SESRIC, as a member of the group, has started the preparations of a project on **“Strategic Plan for the Development of Islamic Tourism in OIC Member Countries”**.
- The first draft of this Plan was circulated to the Member Countries in March 2017 by the OIC General Secretariat for their **feedback and comments**.
- It is expected that the final version of the Plan will be adopted during **the 10th Session of Islamic Conference of Tourism Ministers** that will take place in Dhaka, Bangladesh on 12-14 November 2017.

In order to enhance cooperation at intra-OIC level as well as to improve Islamic tourism ecosystem in OIC member countries, the Roadmap document aims at:

- Providing a study on the background of Islamic tourism, aspects and dimensions and its importance in OIC member countries;
- Conducting a situation analysis on the state of Islamic tourism in OIC member countries; and
- Proposing a strategic direction to be taken with an action plan to develop and promote Islamic tourism in OIC member countries.

The document identifies five key specific thematic areas of cooperation in the domain of Islamic tourism:

1. Data and monitoring,
2. Policy and regulation development,
3. Marketing and promotion,
4. Destination and industry development,
5. Capacity development.

STRATEGIC ROADMAP FOR DEVELOPMENT OF ISLAMIC TOURISM IN OIC MEMBER COUNTRIES



The Roadmap also provides an implementation matrix under each area as a practical guideline for OIC Member Countries.

Thematic Area of Cooperation 1: Data and Monitoring

Objective	Activity	Coordinator	Member Institutions/ Countries	Timeline
<p>1. Develop national Islamic tourism indicators for the collection, collation, processing, and dissemination of Islamic tourism data</p>	<p>National Level</p> <p>1.1 Establish specific units or designate staff under the relevant stakeholders of the national statistical system with a mandate to develop national Islamic tourism indicators.</p> <p>1.2 Conduct the development of national Islamic tourism indicators based on the proposed Purpose, Production, Permanence indicator development framework.</p>	<p>National Statistics Office of OIC Member Countries</p>		
<p>2. Strengthen national statistical systems and the coordination role of national statistical offices in the production and dissemination of Islamic tourism indicators</p>	<p>National Level</p> <p>2.1 Conduct a needs assessment of statistical capacities for the production and dissemination of Islamic tourism data at the national level and an assessment of available resources to address those needs, including those related to technical cooperation, training, and sharing of best practices that may be offered by OIC countries.</p> <p>2.2 Integrate production and dissemination of Islamic tourism indicators into a) the established work programmes of national statistical systems; b) existing national strategies for the development of statistics (NSDS); and c) national and sector development plans and priorities.</p>	<p>National Statistics Office of OIC Member Countries</p>		

V.
Concluding Remarks
and
Policy Recommendations

- For many OIC countries, tourism sector is an important growth-enabling factor and a major source for foreign exchange. Moreover, millions of workers are getting their salaries through **working in this sector**.
- Intra-OIC cooperation is bearing some fruits that each year more tourists originated from OIC countries are visiting other OIC countries. But there is much more room for development. **And the growing competition that stems from non-OIC countries constitute a threat that increasing number of Muslims prefer travelling to non-OIC destinations.**
- Islamic tourism has emerged as an important new segment of tourism sector that has a great unlocked potential. All stakeholders (public sector, private sector, religious authorities, standardization bodies) need to **work together** to unlock its potential.

The challenges are diverse as each country has its own tourism features, level of development and national development priorities and policies.

Technical know-how and weak promotional activity

Tourism-related infrastructures

Tourism investments

Consistent tourism strategies and policies

Tourism diversification

Tourism security & safety issues and crisis management

At the National Level

Sustainable tourism development strategies and plans

Physical planning of tourism destinations

The quality and efficiency of the basic tourism-related infrastructures and services

Synergies between transport and tourism policies

Private sector involvement including SMEs in tourism development plans and projects

Diversification of tourism products and services

Tourism-oriented education and training programmes

Established destinations with major tourism sectors (11)

Turkey; Malaysia; Saudi Arabia; Egypt; Morocco; the United Arab Emirates; Indonesia; Tunisia; Jordan; Lebanon; Maldives.

Countries where tourism is in the growth stage of the tourism area life cycle (26)

Albania; Algeria; Azerbaijan; Bahrain; Bangladesh; Brunei; Cameroon; Cote d'Ivoire; Gambia; Guyana; Iran; Kazakhstan; Kyrgyz Republic; Kuwait; Mozambique; Nigeria; Oman; Pakistan; Palestine; Qatar; Senegal; Sierra Leone; Suriname; Uganda; Uzbekistan; Yemen.

Countries in the early stages of tourism development (16)

Benin; Burkina Faso; Chad; Comoros; Djibouti; Gabon; Guinea; Guinea-Bissau; Mali; Mauritania; Niger; Somalia; Sudan; Tajikistan; Togo; Turkmenistan.

Countries in the rebuilding phase after conflict (4)

Afghanistan; Iraq; Libya; Syria.

At the OIC Cooperation Level

OIC Internet Guide for Tourism

OIC Tourism Alliances, Airline Companies

Agreement on Tourism Visa Arrangements

**Developing Standards for Islamic (Halal) Tourism and
Incentivising the sector**

Promote and Encourage Public-Private Partnership in Tourism

- OIC/COMCEC Tourism Forum (*annual*)
- COMCEC Tourism Working Group Meetings (*every six months*)
- COMCEC Session (*annual*)
- SESRIC Tourism Reports (*biannual*)
- SESRIC Training Programmes (*annual/planned*)
- OIC City of Tourism (*2017: Madinah, Saudi Arabia*)
- Forums (e.g.: *Forum For “Public And Private Investors in the Area of Tourism, October 2017, Cairo, Egypt*)
- Strategy Documents (e.g. *Strategic Roadmap For Development of Islamic Tourism in OIC Member Countries (expected to be adopted during 10th ICTM)*)
- Fairs and Exhibitions (*organized by ICDT*)
- ICTM (Islamic Conference of Tourism Ministers (*biannual*), *10th edition: 12-14 Nov. 2017, Bangladesh*)

THANK YOU MERCİ

شكرا



Statistical, Economic And Social Research And Training Centre For Islamic Countries (SESRIC)

Organisation of Islamic Cooperation (OIC)

www.sesric.org

**Training Programme on the Development and Promotion of
Muslim Friendly Tourism (MFT) in COMCEC Member
Countries, 4-7 July 2017, Ankara, Turkey**