

# INTERNATIONAL TOURISM IN THE OIC COUNTRIES 2022

Prospects and Challenges amid the COVID-19 Pandemic



Organization of Islamic Cooperation  
Statistical, Economic and Social Research  
and Training Centre for Islamic Countries  
(SESRIC)



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# Acronyms

ADB	Asian Development Bank
ASEAN	Association of Southeast Asian Nations
ATTA	Adventure Travel Trade Association
COMCEC	Standing Committee for Economic and Commercial Cooperation
ECA	Europe and Central Asia
ESALA	East and South Asia and Latin America
EU	European Union
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GMTI	Global Muslim Travel Index
HTS	Halal Tourism Services
IATA	International Air Transport Association
ICDT	Islamic Centre for Development of Trade
ICTM	Islamic Conference of Tourism Ministers
ILO	International Labour Organization
IMTI	Indonesia Muslim Travel Index
ISO	International Organization for Standardization
ITC	Islamic Tourism Centre
MENA	Middle East and North Africa
MOTAC	Ministry of Tourism, Arts, and Culture
NTCB	National Tourism Coordination Board
NTDC	National Tourism Development Corporation
OIC	Organisation of Islamic Cooperation
PCR	Polymerase Chain Reaction
RM	Malaysian Ringgit
SESRIC	Statistical, Economic and Social Research and Training Centre for Islamic Countries
SMEs	Small and Medium-sized Enterprises
SMIIC	Standards and Metrology Institute for Islamic Countries
SSA	Sub-Saharan Africa
TRAC	Tourism Recovery Action Committee
Tr-CaB	SESRIC's OIC Tourism Capacity Building Programme
UNWTO	World Tourism Organization
USD	United States Dollar
VAT	Value Added Tax
WHO	World Health Organisation
WTTC	World Travel and Tourism Council



## Foreword

With substantial and sustained growth in international tourist arrivals and tourism receipts, international tourism sector has, over the last four decades, emerged as a major catalyst of economic growth and job creation worldwide. However, these increasing trends were reversed by the emergence of the COVID-19 pandemic and the imposition of strict restrictions on travel and tourism activities to curb the spread of Coronavirus across the globe. In this context, SESRIC's report on "International Tourism in the OIC Countries 2022: Prospects and Challenges amid the COVID-19 Pandemic" provides a comprehensive assessment of the tourism sector in OIC countries by looking into the latest available data with a particular focus on the impacts of the COVID-19 pandemic. The report also discusses the impacts of the pandemic on Islamic tourism, which is an important niche tourism market for the OIC countries group, and elaborates on its implications for intra-OIC tourism cooperation.

The report reveals that the COVID-19 pandemic has caused significant disruption to international tourism activities around the globe, including the OIC countries. The worldwide tourist arrivals declined by 72.7% from 1464 million in 2019 to 400 million in 2020, while the tourism receipts declined from USD 1,466 billion in 2019 to USD 533 billion in 2020, corresponding to a decline of 63.8% in constant prices. In line with the global trends, OIC countries also witnessed a significant decline in tourist arrivals and hosted only 70.4 million international tourists in 2020 compared to 258 million in 2019, corresponding to a decline of 78.7%. Meanwhile, tourism receipts of OIC countries declined by 62.9% from 216 billion in 2019 to 77.8 billion in 2019. Overall, the disruption caused by the pandemic in the OIC countries resulted in estimated losses of USD 293 billion in GDP and 8.6 million jobs.

Amid the pandemic, intra-OIC tourism figures also regressed severely. An estimated USD 56.6 billion in tourism receipts was lost due to a drop of 89 million tourists in intra-OIC tourist arrivals in 2020. Despite recording a tremendous expansion of 37% over the period 2014-2019, the Islamic tourism market has also contracted by 70% from USD 153 billion in 2019 to USD 46 billion in 2020 due to the pandemic. This state of affairs indicates that OIC countries need to exert more proactive policies and implement comprehensive measures in order to capitalise on their existing comparative advantage in this important niche market and gradually reach pre-pandemic levels.

It is important to underline that many OIC countries have exerted substantial efforts during the pandemic in order to mitigate the multidimensional negative effects on the tourism sector. The remedial policies and measures range from setting up an internal crisis management mechanism to offering monetary and fiscal stimulus packages that eased the recovery efforts in the sector. With the start of the vaccination rollout in 2021 and the



gradual lifting of international travel restrictions in 2022, tourism stakeholders in the OIC countries have become more optimistic about recovery in 2022. Yet, projections reveal that the recovery is expected to take several years, and some policies are likely to speed up the pace of recovery, such as investing in the vaccination rollout, developing new tourism products, and furthering intra-OIC cooperation.

This state of affairs necessitates that the OIC countries effectively utilise the platform of the Islamic Conference of Tourism Ministers (ICTM), which held ten sessions between 2000 and 2018, to enhance policy dialogue and spearhead intra-OIC cooperation in this domain. In addition, some programmes and initiatives within the framework of the OIC can also provide a great opportunity for enhancing South-South cooperation and for promoting the knowledge sharing among the OIC countries in areas such as how to mitigate the negative effects of the pandemic, speed up the recovery efforts, and increase the resilience of the tourism sector. These include the COMCEC Working Group on Tourism, SESRIC's OIC Tourism Capacity Building Programme (Tr-CaB), and the OIC Strategic Roadmap for Development of Islamic Tourism

On the other hand, it is worth mentioning that the global tourism sector is now at crossroads due to various dynamics such as climate change, rapid digitalisation, disease outbreaks, and conflicts. These emerging trends bring a set of new opportunities as well as challenges for the development of sustainable tourism sector in OIC countries and elsewhere. I hope that the findings of this report will be instrumental contribution to the OIC joint efforts towards promote and enhancing intra-OIC cooperation for the development of a resilient tourism sector in the OIC countries.

Nebil DABUR  
Director General  
SESRIC



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Tazeen Qureshi authored the boxes and Section 4.1 on Policy Responses of Selected OIC Countries during the COVID-19 Pandemic. Cem Tintin prepared all the remaining sections of the report.



# Executive Summary

International tourism has turned into one of the main economic activities and an important source of foreign exchange earnings, economic growth, and employment in many countries. More than 10% of the world's GDP was generated in this sector just before the outbreak of the pandemic. Yet, the COVID-19 pandemic has hit tourism activities severely all around the globe including the OIC countries. Against this background, the report provides an overview of the state of international tourism in the OIC countries with a particular focus on the COVID-19 pandemic period and identifies key challenges and prospects brought by the pandemic. In addition, the report provides a list of policy implications on how to overcome those challenges and benefit from the prospects for effective recovery of tourism activities.

## International Tourism Worldwide: Overview

Before the outbreak of the COVID-19 pandemic, 10.4% of the world's GDP and 10% of all jobs were generated in the tourism sector in 2019. The declaration of the pandemic of COVID-19 on 11 March 2020 by the World Health Organization triggered a wave of travel restrictions in different forms and intensities that put the tourism sector into a difficult position. Due to the pandemic, international tourist arrivals went down by 72.7% to 400 million in 2020 and slightly went up in 2021, hitting 415 million. The biggest drops in arrivals were recorded in the Asia & Pacific (83.5%) and Africa (76.8%) regions in 2020. In a similar vein, the worldwide tourism receipts went down from USD 1,466 billion in 2019 to USD 533 billion in 2020, a decline of 63.8% in constant prices. At the regional level, the biggest decline was recorded in the Middle East (73%), followed by the Asia & Pacific region (70.4%).

## International Tourism in the OIC Countries

Like in many countries around the globe, the tourism sector in the OIC countries was affected negatively by the pandemic. Estimations show that the OIC countries hosted 70.4 million international tourists in 2020 instead of a baseline projection of 277.8 million. In addition, the pandemic prevented the OIC countries from generating potential USD 233.3 billion tourism receipts, and the prevailing conditions only allowed them to collect tourism revenues of USD 77.8 billion in 2020. This means a potential loss of USD 155.5 billion in tourism receipts in the OIC group due to the containment measures and wide range of restrictions imposed by the countries all around the world. In 2021, based on the provisional data of the UNWTO, the average tourist arrivals in the OIC group contracted by 78.7% and the receipts went down by 62.9% over 2019. As a result of the pandemic, the average contribution of tourism to employment in the OIC countries declined from 7.5% in 2019 to 6.2% in 2020, corresponding to an estimated loss of 8.6 million jobs. The estimated size of the loss in GDP generated by the travel and tourism sector was measured at USD 293 billion in 2020 in the OIC countries. In terms of intra-OIC tourism receipts, an estimated USD 56.6





billion was lost due to a potential drop of 89 million in intra-OIC tourist arrivals in 2020. Likewise, the pandemic resulted in a 70.1% contraction in the size of the Islamic tourism market in 2020 in the OIC group.

### Policy Responses and Recovery in the Tourism Sector

To mitigate the negative effects of the pandemic on tourism, the OIC countries have implemented a wide range of policies and measures since the outbreak of the pandemic, ranging from setting up internal crisis management mechanisms to offering monetary and fiscal stimulus packages. As a result, the effects of the pandemic on the tourism sector of the OIC countries are not homogeneous, and wide disparities exist at the individual country level depending on the strictness of the containment measures and recovery measures that are being implemented. Yet, the projections reveal that the recovery is expected to take a few years. Nevertheless, a number of emerging trends such as digitalisation, social media, the role of the young population (generation Z), and growing interest in Islamic tourism during the pandemic could ease the recovery in the tourism sector and help the sector to return to its positive growth trajectory seen before the pandemic.

### Concluding Remarks and Policy Implications

According to the UNWTO, the COVID-19 pandemic is the biggest crisis hit the tourism sector since World War II. Yet, the start of the vaccination rollout in 2021 increased hopes for a restart and recovery in the tourism sector in the OIC countries and elsewhere. Projections reveal that the recovery will be gradual. Nevertheless, policymakers could influence the pace of recovery in their respective countries. In particular, by investing in the vaccination rollout, developing new tourism products, and furthering intra-OIC cooperation, the OIC countries are likely to speed up the pace of recovery. As the OIC countries are rich in terms of policies and measures to address the negative impacts on the tourism sector, sharing knowledge and best practices could play a critical role in such difficult times of the pandemic.







International tourism comprises the activities of individuals travelling to and staying at places outside their usual permanent places of residence for a period not exceeding 12 months for leisure, business, and other purposes. Based on this broad definition, the tourism industry includes all socio-economic activities that are directly and/or indirectly related to the provision of goods and services for tourists. In this regard, the UNWTO identifies 185 supply-side activities that have significant connections to the tourism sector. These activities include the services of various sectors, such as transportation and communication, hotels and lodging, food and beverages, cultural and entertainment services, banking and finance, and promotion and publicity services.

Over the past few decades, international tourism activity has shown substantial and sustained growth in terms of both tourism revenues and the number of tourists, and has left broad economic, social, cultural, and environmental footprints reaching almost every part of the globe. International tourism activity generates significant economic benefits to tourists' host and home countries alike. It has become one of the largest sectors in the world as well as an important category of international trade. The tourism sector created 1 in every 4 new jobs across the globe before the outbreak of the COVID-19 pandemic.

The OIC countries, as a group, have increasingly acknowledged the importance of the sector given its direct and indirect linkages with various economic activities. The tourism sector also brings a wide range of social benefits by promoting peace, harmony, and cultural dialogue and creating opportunities for vulnerable groups. To this end, tourism has been listed amongst the six priority areas for cooperation in the adopted Standing Committee for Economic and Commercial Cooperation of the OIC (COMCEC) Strategy, with the strategic objective of developing a sustainable and competitive tourism sector in the OIC region. In this context, it is also worth noting that tourism cooperation activities have assumed greater importance on the agenda of the OIC over the last two decades. Indeed, ten Islamic Conference of Tourism Ministers (ICTM) and a number of expert group meetings and seminars on tourism development have been held during the period that elapsed since the First ICTM, which was held in Isfahan, Islamic Republic of Iran, in October 2000. A wide range of resolutions has been adopted in these conferences and meetings aiming at developing the tourism sector in the OIC countries and enhancing the cooperation in this vital and multidimensional field of economic, social, and cultural activity. More recently, the 'OIC 2025: Programme of Action', which was adopted in Istanbul in 2016, identified five specific goals related to the tourism development in the OIC countries.

With their rich and diverse set of natural, geographic, historical, and cultural attractions, the OIC countries, as a group, possess a significant potential for the development of a sustainable international tourism sector. Moreover, the OIC countries, as a group, have recorded a significant growth momentum over the past decade in some niche markets of



the tourism industry like Islamic tourism. Yet, the desirable levels of tourism development in many OIC countries, and in the OIC region as a whole, have not yet been achieved.

Due to the rapid transmission of the COVID-19 virus, the World Health Organisation (WHO) declared the situation a pandemic on 11 March 2020. Following this decision, almost all destinations across the globe started to implement tight measures including closures of borders to contain the spread of the virus that resulted in the biggest crisis in the history of tourism since World War II. Consequently, the worldwide tourist arrivals declined by 72.7% in 2020 as compared to 2019, while the tourism receipts declined by 63.8% (UNWTO, 2022a). The shock hit the OIC countries alike, such that the OIC group is estimated to have lost around USD 294 billion in its total GDP. Many tourism stakeholders experienced difficult times to maintain their operations, ultimately causing an estimated loss of 8.6 million jobs in the OIC group in 2020. Intra-OIC tourism activities slowed down remarkably, and arrivals are estimated to have declined by about 89 million in 2020. In other words, the COVID-19 pandemic set back some portion of the progress achieved by the OIC group in the domain of tourism cooperation.

Nevertheless, as a response to the pandemic, many OIC countries have also developed and implemented a set of policies to mitigate the negative impacts on the tourism sector, support tourism stakeholders, and restart tourism activities. These policies included setting up an internal crisis management mechanism, developing health protocols, extending fiscal and monetary support schemes, and investing in alternative niche tourism markets. Those measures that are taken by the OIC countries have not only reflected their abilities to develop prompt policy responses against external shocks, but also helped the recovery efforts of tourism stakeholders in their respective countries. The pandemic has also highlighted the importance of enhancing the intra-OIC tourism cooperation through such ways as experience sharing and knowledge transfer in building up capacities that have facilitated the recovery efforts in the tourism sector.

Against this background, this report, first, provides an assessment of the impacts of the COVID-19 pandemic on the tourism sector globally in Section 2. Then, in Section 3, it specifically focuses on the impacts of the pandemic on the tourism sector of the OIC countries by looking into its effects on the traditional tourism indicators (e.g. tourist arrivals and tourism receipts) and a number of economic variables (e.g. GDP and employment). Section 4 of the report reviews selected OIC countries' policies and measures that are aimed at mitigating the impacts of the pandemic, while providing a discussion on the outlook of the tourism sector and recent trends that could potentially drive the recovery in the sector. Lastly, Section 5 provides concluding remarks and presents a number of policy recommendations to serve as broad policy guidelines in addressing the challenges brought by the pandemic and preparing the tourism sector for the post-pandemic era.



## 2. International Tourism Worldwide: Overview



The international tourism market had been expanding in terms of both tourist arrivals and tourism receipts over the recent years before the COVID-19 pandemic unfolded. Both the number of international tourist arrivals and tourism receipts climbed up, and therefore the tourism sector had become an important source of income for many economies around the globe. The sector created millions of jobs for people around the world including some vulnerable segments like persons with disabilities, women and youth. Moreover, in many countries, the sector significantly contributed to the conservation and sustainability efforts of several national parks, protected areas, wetlands and beaches.

To put into perspective, just before the outbreak of the COVID-19 pandemic, 10.4% of the world's GDP (USD 9.2 trillion) and 10% of all jobs (334 million) were generated in the tourism sector in the year 2019 (WTTC, 2021)<sup>1</sup>. In other words, the sector created 1 in every 4 new jobs across the globe before the pandemic. As the tourism sector has direct and indirect linkages with 185-supply side activities in the economy, a shock such as a pandemic could have the potential to affect a chain of economic activities from transportation to hoteliers (OECD, 2020). For instance, UNCTAD (2021) estimated that, due to linkages with upstream sectors like agriculture, a drop in tourist sales lead to a 2.5-fold loss in real GDP, on average, in absence of any stimulus packages.

The declaration of the pandemic of COVID-19 on 11 March 2020 by the World Health Organization triggered a wave of travel restrictions in different forms and intensities that put the tourism sector into a difficult position. Due to the intensity of the shock, the UNWTO defined the pandemic as the worst crisis in tourism since World War II.

According to UNWTO (2020a), 217 destinations around the globe started to implement a form of restriction on travel (full or partial) that either limited international tourism activities or stopped them at all on 27 April 2020. The most extreme restrictions seen during the pandemic were in the form of border closures. On 27 April 2020, 156 destinations fully closed their borders and this number further increased to 165 on 18 May 2020 (Figure 2.1). Those restrictions and measures continued both in 2020 and in 2021 at varying intensities and scope as the spread of the virus could not be fully stopped yet.

Nevertheless, full border closures gradually declined over time, partly due to the introduction of new hygiene and safety regulations to restart international travel. The availability and inoculation of the COVID-19 vaccines also played a role in reducing such restrictions. Consequently, the number of destinations with full border closures decreased to 46 as of 1 November 2021.<sup>2</sup> With the continuation of the vaccination efforts and reduction in the number of new cases, as of 2022, the number of such destinations

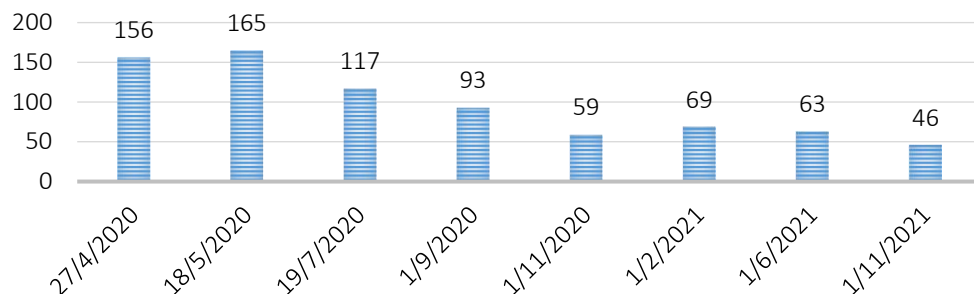
<sup>1</sup> A detailed discussion regarding the economic impacts of the pandemic on the OIC countries is presented in Section 3.2.

<sup>2</sup> A detailed discussion on the types of restrictions and future implications of them on the OIC countries are presented in Section 4.2.



has continued to decline, which is promising for a gradual recovery in international tourism activities.

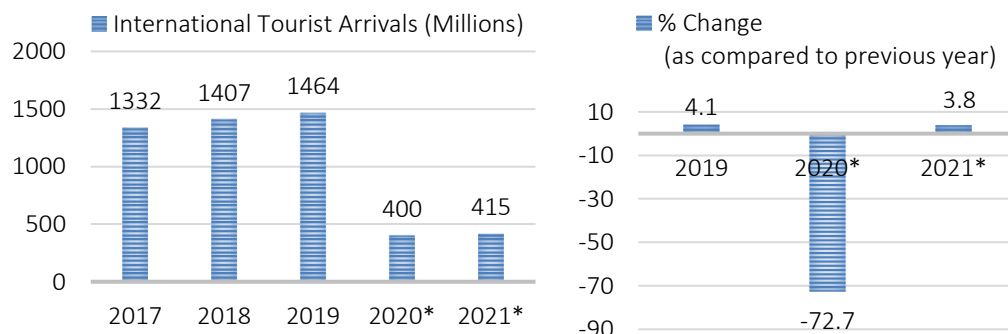
**Figure 2.1: Number of Destinations with Complete Border Closure due to COVID-19**



Source: UNWTO as of 1 November 2021

A closer look at the impacts of the pandemic on the worldwide international tourist arrivals reveals that, with the outbreak of the COVID-19 pandemic, arrivals went down by 72.7% to 400 million in 2020 (Figure 2.2, left). With the availability of the vaccines against COVID-19, policies to restart tourism activities, and inoculation efforts, the worldwide international tourist arrivals saw a slight improvement and are estimated to reach 415 million by the end of 2021, corresponding to an annual increase of 3.8% compared to 2020 (Figure 2.2, right). Yet, the estimated figure for worldwide arrivals for the year 2021 was 71.6% lower than the pre-pandemic level, reflecting the intensity of the shock in the global tourism market. UNWTO (2020b) reported that, due to the COVID-19 pandemic, the global tourism sector lost between five and seven years’ worth of growth and it will take several years to reach the pre-pandemic levels.

**Figure 2.2: Worldwide International Tourist Arrivals**



Source: UNWTO.\* Provisional data

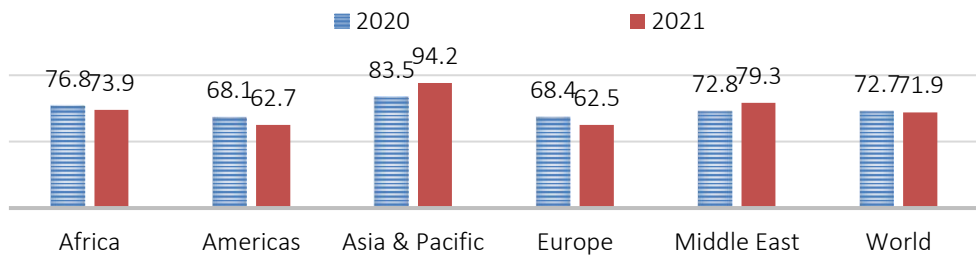
In terms of the regional impact of the COVID-19 pandemic, Asia & Pacific (83.5%) and Africa (76.8%) recorded the highest proportional declines in tourist arrivals in 2020 (Figure





2.3). The blanket-type restrictions implemented particularly by the countries in Asia & Pacific played a significant role in this picture. In addition, the first COVID-19 cases reported from China and many Asian countries started the implementation of travel restrictions a bit earlier in this region than in other regions in 2020 (UNWTO, 2020a; UNWTO and ADB, 2022). In 2021, Asia & Pacific (94.2%) and Middle East (79.3%) reported the highest declines in tourist arrivals at the regional level. In 2021, Europe (62.5%) saw a relatively limited contraction especially due to the high level of common understanding in terms of regional restrictions and the implementation of an EU-wide standardized vaccination passport (certificate) that facilitated flows of tourists across the continent (UNWTO, 2022a; European Commission, 2022).

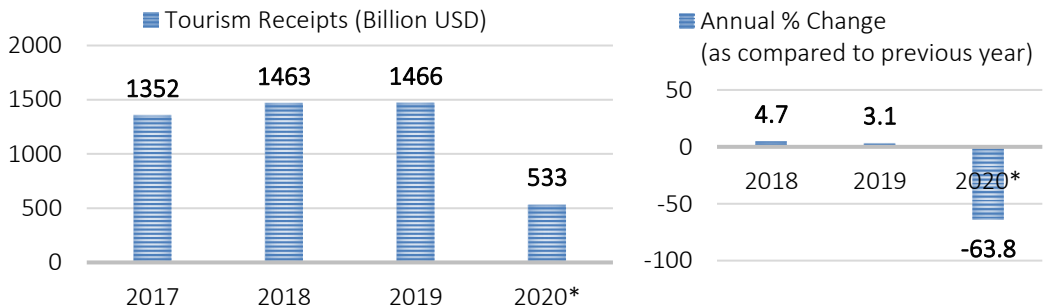
**Figure 2.3: Impact of COVID-19 Pandemic on International Tourist Arrivals by Region (% Decline over 2019)**



Source: UNWTO, Barometer 2022

The decline in international tourist arrivals also led to a significant contraction in international tourism receipts on the global scale, mainly stemming from the travel restrictions and other widespread measures to contain the spread of the COVID-19 virus. The worldwide tourism receipts went down from USD 1,466 billion in 2019 to USD 533 billion in 2020, corresponding to a decline of 63.8% in constant prices (Figure 2.4).

**Figure 2.4: Worldwide International Tourism Receipts**



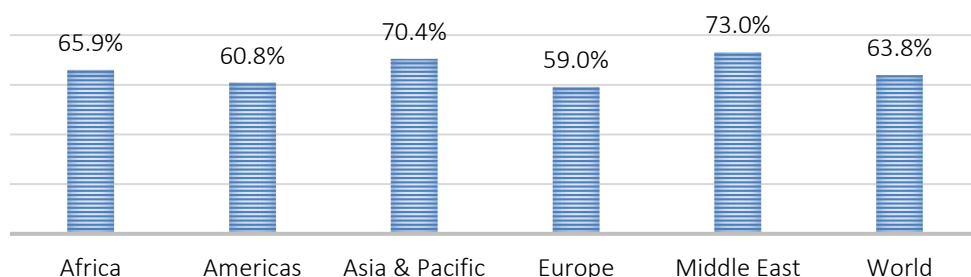
Source: UNWTO. \* Provisional data

Note: The right panel uses local currencies in constant prices to reflect the annual change.



At the regional level, the Middle East (73%) recorded the biggest decline in international tourism receipts in 2020 as compared to 2019 (pre-pandemic period), followed by Asia & Pacific (70.4%) and Africa (65.9%) (Figure 2.5). Overall, all regions of the world were affected abruptly by the pandemic and reported significant losses in 2020 as compared to 2019.

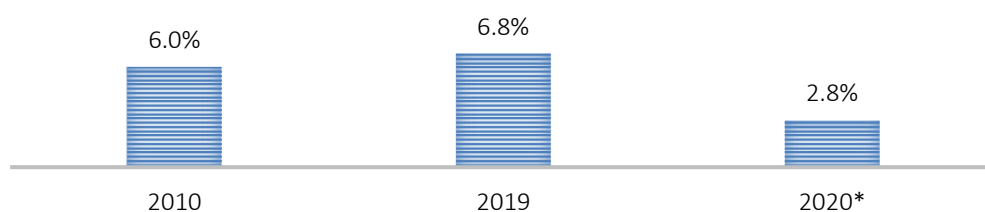
**Figure 2.5: Impact of COVID-19 Pandemic on International Tourism Receipts by Region (% Decline over 2019)**



Source: UNWTO, Barometer 2022

The significant losses in international tourism receipts are reflected in a decline in the share of international tourism in the world's total exports of goods and services. Before the start of the pandemic in 2019, this share was measured at around 6.8% (Figure 2.6). In 2020, it decreased to 2.8% due to an overall reduction in foreign exchange earnings of countries around the globe and a drop in tourism receipts. In other words, the relative importance of international tourism in the world economy plummeted due to the pandemic when its contribution to exports is considered.

**Figure 2.6. Share (%) of International Tourism in World's Total Exports of Goods and Services**



Source: UNWTO Barometer, November 2021. \*Provisional data

Note: Based on Balance of Payments (BOP) statistics, Travel and Passenger Transport category under services exports.

The pandemic not only affected the travellers' confidence but also eroded foreign investors' confidence in the tourism sector. The sector entered 2020 after posting a strong Foreign Direct Investment (FDI) performance in 2019, with 710 greenfield projects announced — a 9% increase from 2018. In 2020, worldwide cross-border investment

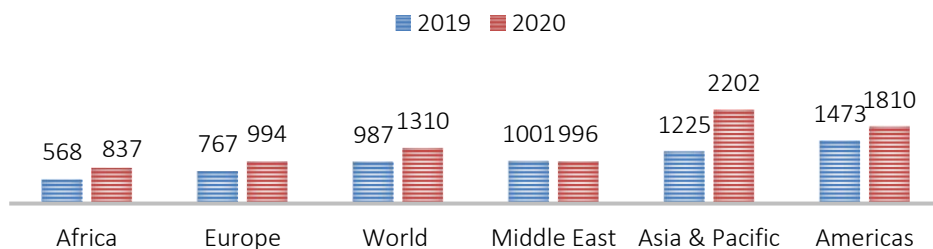


announcements in the tourism sector declined by 63% from 2019, with just 261 new investment projects. In the same period, capital investment in the sector decreased by 74% to USD 15.7 billion and job creation also fell by 72% to almost 37,000 new jobs (FDI Intelligence, 2021).

While tourist arrivals and receipts followed a negative trend over the period 2019-2020, the world tourism receipts per arrival increased from USD 987 in 2019 to USD 1,310 in 2020. At the regional level, on average, countries in Asia & Pacific successfully generated more revenue per international tourist that went up from USD 1,225 in 2019 to USD 2,202 in 2020. Americas also saw a significant increase between 2019 and 2020 in tourism receipts per arrival that went up by USD 337. In 2020, international tourism receipts per arrival remained below the world average of USD 1,310 in Middle East (USD 996), Europe (USD 994) and Africa (USD 837) (Figure 2.7).

A number of factors affect the tourism receipts per arrival, such as the USD exchange rate, the length of stay, and the geographical location of the country. Amongst others, the spectrum of value-added tourism products and services is an important determinant of the spending patterns of tourists. In particular, international tourism activities have become more expensive during the pandemic due to the additional procedures that raise the cost of travel and stay, such as compulsory PCR tests, hygiene kits, isolation periods in hotels, and social distancing measures in public spaces. Moreover, the global inflationary pressure increased the worldwide prices of several commodities and energy prices (SESRIC, 2021). This has resulted in an increase in tourism spending (receipts). In this context, the increase seen in tourism receipts per arrival in 2020 should be interpreted with some caution. Overall, countries should focus on devising effective policies to offer more value-added tourism services and diversifying their existing services to increase international tourism receipts per arrival in the long run.

**Figure 2.7: International Tourism Receipts per Arrival, 2019 vs. 2020 (USD)**



Source: SESRIC staff calculations based on data from the World Tourism Organization (UNWTO)



# 3. International Tourism in the OIC Countries

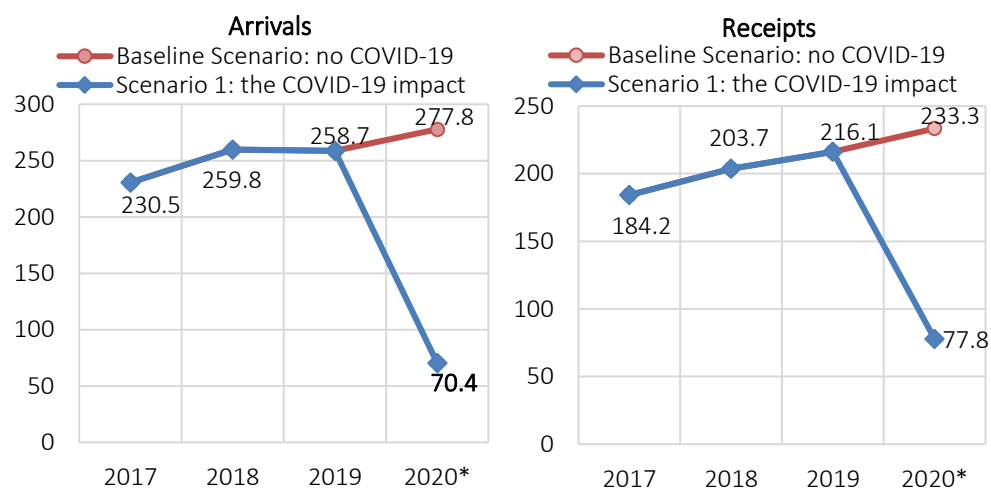


This section assesses the tourism performance of the OIC countries over the recent years, based on available data, in four main dimensions. First, it looks into the developments in the number of tourist arrivals and tourism receipts with a particular focus on the COVID-19 pandemic period. Second, it overviews the economic role of international tourism in the OIC countries and examines how the pandemic has affected the economic importance of the sector in the OIC group. Third, it provides an overview of the intra-OIC tourism activities and presents some estimations on the impacts of the pandemic on intra-OIC tourist arrivals and tourism receipts. Finally, the section concludes with a discussion on the state of Islamic tourism in the OIC countries and the implications of the pandemic on the development of this niche sector.

### 3.1 Tourist Arrivals and Tourism Receipts

Like in many countries around the globe, the tourism sector in the OIC countries was hit by the pandemic severely. The devastating impacts of the pandemic (such as the confidence erosion in international travel and the strict containment measures put in place, like curfews, lockdowns, border closures, and cancellation of international flights) resulted in significant losses in terms of both tourist arrivals and tourism receipts.

**Figure 3.1: International Tourist Arrivals (in Millions, left) and Receipts (in Billion USD, right) in OIC Countries**

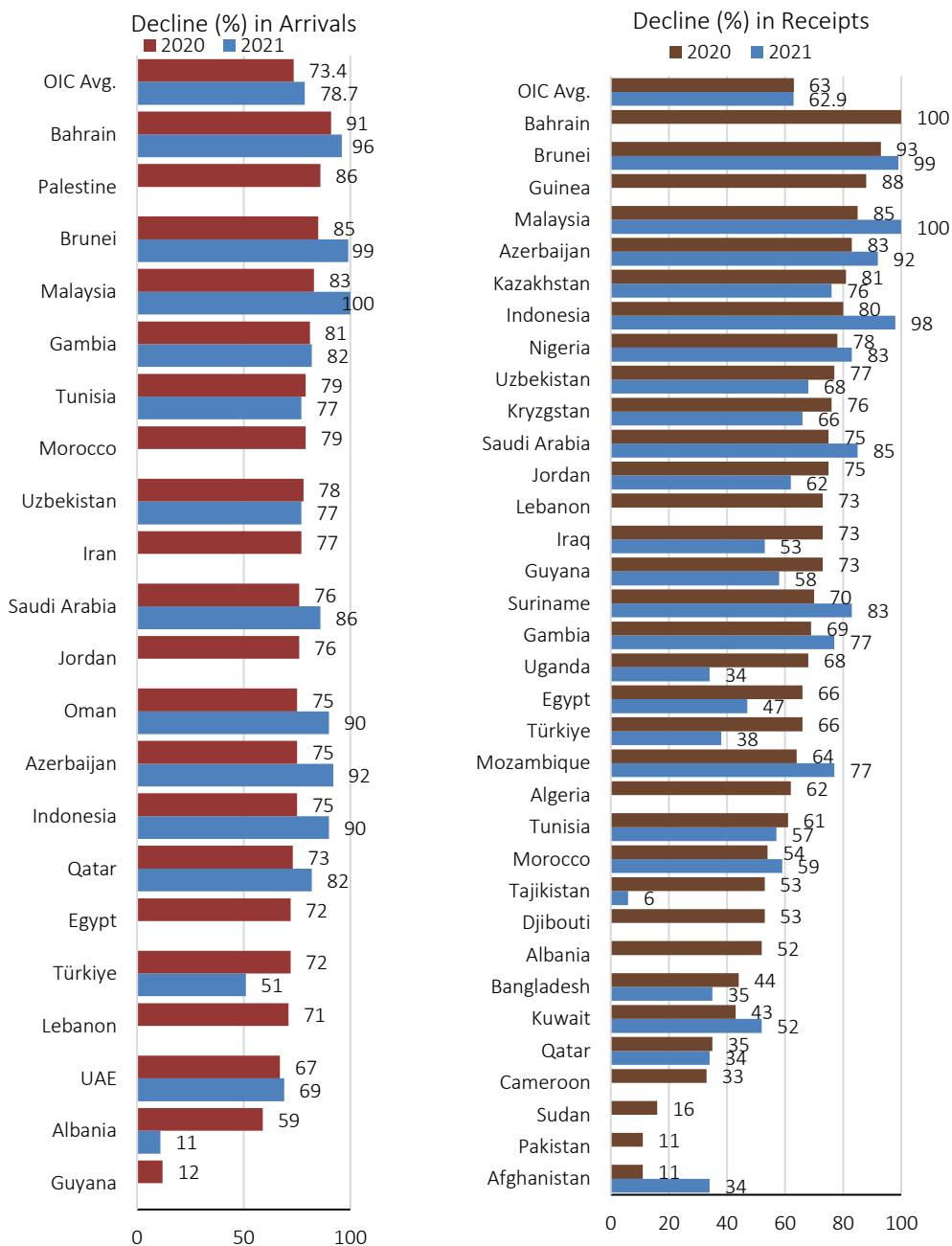


Source: SESRIC staff calculations based on UNWTO data covering 45 OIC countries. \*The baseline scenario used the trend values over the period 2017-2019 to estimate 2020. Estimation in Scenario 1 used the UNWTO world averages of 73% decline in arrivals and 64% decline in receipts.

To put it into perspective, Figure 3.1 presents the estimations made for the OIC countries on international tourist arrivals and tourism receipts based on two scenarios. The baseline scenario assumes that there is no COVID-19 outbreak, such that, in 2020, the OIC countries followed the positive pattern seen over the period 2017-2019 in terms of both



Figure 3.2: Decline (%) in International Tourist Arrivals and Tourism Receipts in OIC Countries (over 2019)



Source: UNWTO Global Tourism Dashboard, January 2022

Note: The 2021 dataset covers the period January-September. All OIC countries with available data are reported. Missing values are not reflected on the charts.



tourist arrivals and tourism receipts. Scenario 1 assumes that COVID-19 hit the OIC countries' tourism sector to the same extent as it did in the world. Accordingly, the estimates show that the OIC countries hosted 70.4 million international tourists in 2020 instead of a baseline projection of 277.8 million. This translates into a potential USD 155.5 billion loss in tourism receipts in the OIC group. In other words, the pandemic prevented the OIC countries from generating potential USD 233.3 billion tourism receipts, and the prevailing conditions only allowed them to collect tourism revenues of USD 77.8 billion in 2020.

The estimates show that, compared to 2019, the OIC countries, as a group, hosted 73% fewer international tourists and earned 64% less tourism receipts in 2020, according to scenario 1 (Figure 3.1). Those estimated figures seem to be realistic. The provisional data reported by UNWTO (2021) for a group of OIC countries revealed that tourist arrivals, on average, declined by 73.4% and receipts went down, on average, by 63% in 2020 as compared to 2019 (Figure 3.2). In 2021, based on the provisional data of the UNWTO, the average tourist arrivals in the OIC group contracted by 78.7% and receipts went down by 62.9% over 2019. Nevertheless, wide disparities exist at the individual country level. In terms of arrivals, the magnitude of decline exceeded 85% in Bahrain, Palestine and Brunei Darussalam in 2020 over 2019. In 2021, the estimated declines were more than 95% in Malaysia, Brunei Darussalam and Bahrain. In a similar vein, the drop in tourism receipts in 2020 was more than 85% in Bahrain, Brunei Darussalam, Guinea, and Malaysia. In 2021, the biggest relative declines in tourism receipts were recorded in Malaysia, Indonesia, Brunei Darussalam and Azerbaijan where the magnitude of reduction exceeded 90% in comparison with the level of tourism receipts reported in 2019 (pre-pandemic).

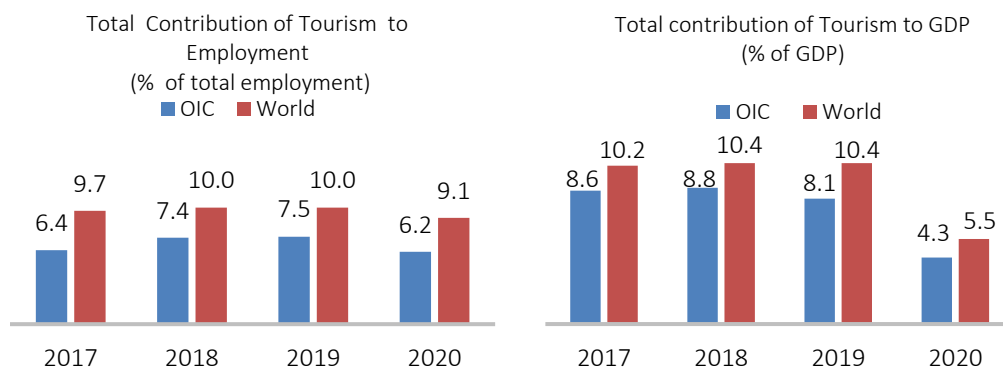
### 3.2 Economic Role of International Tourism

Data reported by the World Travel and Tourism Council (WTTC, 2021a) bring additional insights into quantifying the economic impacts of the pandemic in the OIC countries. In particular, given the direct and indirect linkages of the tourism sector with the overall economy and with more than 185 supply-side activities, a contraction in the sector could associate with significant negative impacts on employment and GDP.

The total contribution of international tourism to employment in the OIC countries, on average, increased from 6.4% in 2017 to 7.5% in 2019 (Figure 3.3, left). Globally, it also went up from 9.7% in 2017 to 10.0% in 2019. The total contribution of tourism to GDP in the OIC countries, on average, climbed up from 8.6% in 2017 to 8.8% in 2018. In 2019, the average of the OIC group witnessed a slight decrease and was recorded at 8.1%. The world average also saw an increase from 10.2% in 2017 to 10.4% in 2019. In other words, the contributions of the tourism sector to employment and GDP remained sub-potential in the OIC group as compared with the world average even before the pandemic.



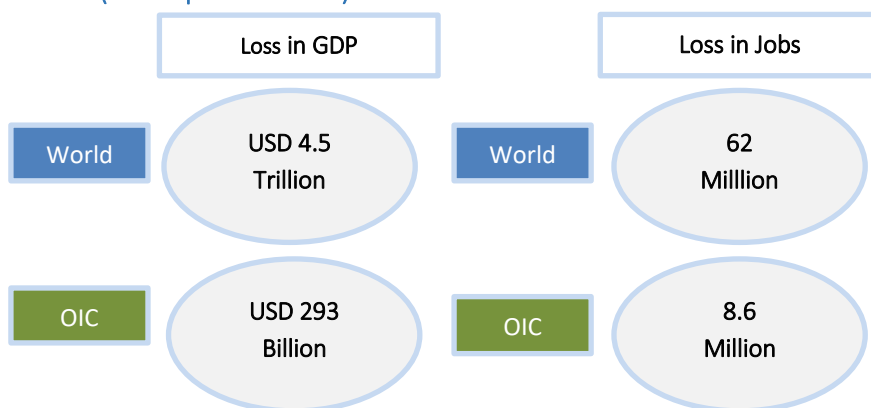
**Figure 3.3: Contribution of International Tourism to Economy**



Source: World Travel and Tourism Council (WTTC)

In 2020, with the outbreak of the pandemic, due to a significant reduction in tourist arrivals and tourism receipts, the average contribution of tourism to employment in the OIC countries declined from 7.5% in 2019 to 6.2% in 2020, corresponding to an estimated loss of 8.6 million jobs. In a similar vein, the contribution of travel and tourism activities to GDP in the OIC group decreased from 8.1% in 2019 to 4.3% in 2020 (Figure 3.3, right). The estimated size of the loss in GDP stemming from the contraction in the travel and tourism sector was measured at USD 293 billion in 2020 in the OIC countries, mainly due to a variety of measures taken to contain the spread of the virus (Figure 3.4). Around the globe, the contraction in the sector caused a loss of about USD 4.5 trillion in the 2020 GDP. In the same year, the contraction resulted in 62 million job losses in the world, of which 8.6 million occurred in the OIC countries (Figure 3.4). With those losses, 272 million people were left employed across the sector globally. The threat of job losses persists as many jobs are currently supported by government retention schemes and reduced hours (WTTC, 2021).

**Figure 3.4: Impacts of COVID-19 Pandemic on GDP and Jobs of Travel and Tourism Sector in 2020 (as compared to 2019)**



Source: SESRIC staff calculations based on data from WTTC





According to UNWTO (2020a), globally around 80% of all tourism businesses are small-and-medium-sized enterprises (SMEs) that have limited sources to survive in case of an economic shock like the current one due to the COVID-19 outbreak. The tourism sector not only creates millions of jobs but also provides opportunities for some vulnerable groups like women, youth, and rural communities in many developing and developed countries (UNWTO, 2020c; UN, 2020). In this regard, a recession or a crisis in the sector could translate into a loss of millions of jobs and hours worked. In particular, in many developing countries and several OIC countries, the pandemic hit a wide range of tourism stakeholders including the vulnerable groups working in tourism-related sectors, which trigger both the jobless and poverty rates (UN, 2020) (see Box 3.1). There is some evidence in this direction. Evidence from five countries – Brunei Darussalam, Mongolia, Philippines, Thailand, and Viet Nam – reveals that job losses in the tourism-related sectors in 2020 were four times greater than in non-tourism sectors (ILO, 2021). Moreover, based on the dataset of a group of countries in the Asia-Pacific region, as formal jobs in the tourism sector declined due to the pandemic, workers moved into the informal sector. This exacerbated the informal economic activities, resulted in revenue losses for governments, and increased the vulnerability of those workers (ILO, 2021).

### Box 3.1: The COVID-19 Pandemic, Tourism and Vulnerable Groups

The COVID-19 pandemic has had a devastating and disproportionate effect on the vulnerable groups that are reliant on travel and tourism sectors for their survival, such as women, youth, the elderly, people with disabilities, and indigenous communities. A study from Indonesia, for example, shows that the employment vulnerability of women, youth, and low-educated workers in the tourism sector was more than five times higher as compared to the national average during the pandemic (Sun et al., 2021).

Globally, women make up around 54% of the workforce in the tourism sector, often employed in low-skill or informal jobs (ILO, 2020). Women employed in the informal, low-skilled, or service sector are less resilient to crisis because they earn less, save less, and have more insecure jobs.

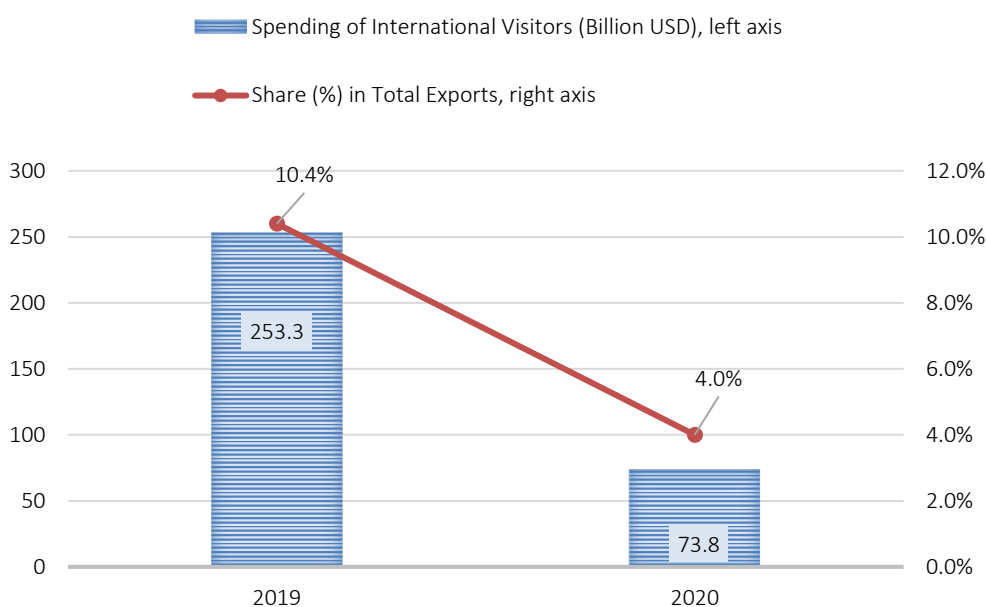
The young workforce in the tourism sector is among those heavily affected by the pandemic. According to ILO (2020), globally, approximately 178 million youth (15 – 24 years) were employed in the tourism sector in 2020 and more than 40% of them were employed in sectors worse affected by the pandemic (including tourism). Indigenous groups, especially those involved in the tourism industry or those heavily reliant on tourism, are often marginalized and face several disadvantages. For example, studies find that the pandemic has significantly curbed the earnings of indigenous women involved in the sale of handicrafts and other goods (UN, 2020a).

For vulnerable groups, tourism is often a way in which they can integrate and participate in society, achieve economic empowerment, and generate income. Vulnerable communities often rely on tourism to facilitate ‘service delivery in remote or rural locations, economic growth of rural areas, access to training and jobs, the transformation of communities, and promotion and preservation of historical, cultural, and natural heritage’ (UN, 2020). The COVID-19 pandemic has put these achievements at risk.



The sharp decline in international tourist arrivals resulted in a significant reduction in tourism spending in the OIC countries as elsewhere. The estimated spending made by international visitors in the OIC countries went down from USD 253.3 billion in 2019 to USD 73.8 billion in 2020 (Figure 3.5). As a result, the foreign exchange earnings of OIC countries from those visitors eroded and could only make up 4% of total exports of the OIC group in 2020, down from 10.4% in 2019. In particular, this poses a relatively higher risk factor for the OIC countries with a high reliance on foreign exchange earnings from the tourism sector, like the Maldives and the Gambia (SESRIC, 2020a).

**Figure 3.5: The Impact of Spending of International Visitors on Total Exports in OIC Countries**



Source: World Travel and Tourism Council (WTTC)

The COVID-19 pandemic has reduced international travel activities in the world, including in the OIC countries. Such a reduction in air, sea, road, and rail travel is leading to significant losses, such as in terms of incomes, tax revenues, and jobs (see Box.3.2).



### Box 3.2: The COVID-19 Pandemic and the Travel Industry

COVID-19 response measures have caused disruptions in almost every segment of the travel industry (SESRIC, 2021). Prohibitive quarantine measures, travel and mobility restrictions, and social distancing measures, amongst others, have resulted in a significant reduction in domestic and international travel. In turn, this has negatively affected the demand for a number of services in the transportation, tourism, and hospitality sectors.

Reduced demand for air travel, for instance, has not only affected revenues of airline carriers, but also lowered the need for transport operators to invest in newer aircraft and lowered operational capacities of airports, affecting approximately 65 million people employed in the aviation industry around the world (SESRIC, 2021).

As compared to 2019, the aviation traffic volume (measured in revenue passenger kilometres) reduced by 65.9% in 2020. In 2021, passenger traffic improved by merely 6.2% as compared to 2020 (IATA, 2021a). As compared to 2019, there was a loss of 56.1% in airline revenue in 2020. The industry recovered with an improvement of 26.5% in revenues in 2021. The International Air Transport Association (IATA) foresees that air passenger numbers are expected to recover fully from the pandemic-related disruptions by 2024 (IATA, 2021b). The cruise/passenger market, which showed a decline of between 50% and 90% in 2020, was also negatively affected by the COVID-19 contagion (SESRIC, 2021).

In rail and road transportation, restrictions on services and people's movement, combined with authorities' advice to not travel, have led to a decrease in passenger volumes of approximately 80% for all national rail services during lockdowns. For international rail passenger services, the passenger volumes have fallen by almost 100% for all operators, in line with international passenger border closures. The estimated loss was estimated between USD 78 and USD 125 billion in 2020 because of the pandemic (SESRIC, 2021).

Overall, the pandemic hit the worldwide travel industry severely, and the significant declines in the volume of passengers resulted in losses of billions of dollars. It is expected the recovery will take a few years along with the restart of tourism activities.

### 3.3 Intra-OIC Tourism Activities

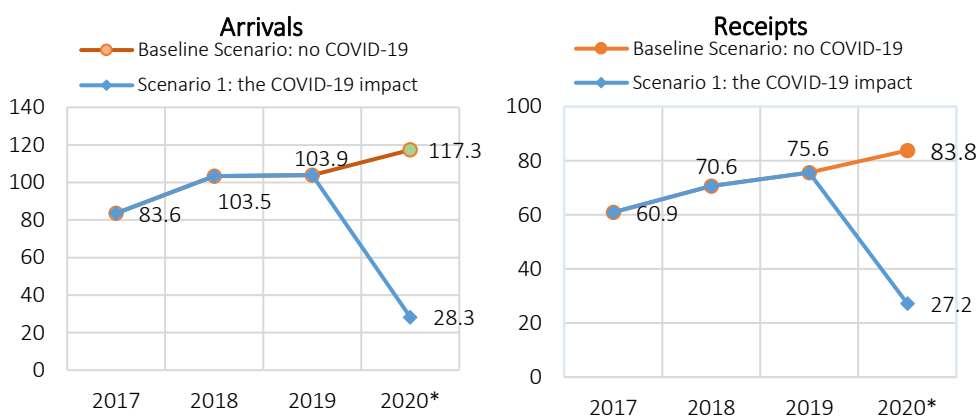
The pandemic has negatively affected the positive trend seen in intra-OIC tourism activities over recent years (SESRIC, 2020b). As observed in the figures on international tourist arrivals and tourism receipts, a gloomy picture exists in intra-OIC tourism activities in 2020 due to the outbreak of the pandemic.

Figure 3.6 presents estimations of intra-OIC tourist arrivals and receipts for the year 2020. The baseline scenario reflects the usual growth trajectory of the tourism sector in the OIC countries based on their performance during the 2017-2019 period with the assumption that there is no COVID-19 outbreak in 2020. Scenario 1 considers the impact of the



pandemic. Accordingly, intra-OIC tourist arrivals are projected to be recorded at 117.3 million in the baseline scenario and 28.3 million in Scenario 1 (Figure 3.6). In a similar vein, intra-OIC tourism receipts were expected to increase from USD 75.6 billion in 2019 to USD 83.8 billion in 2020 in the baseline scenario. Yet, in Scenario 1, intra-OIC tourism activities only generated USD 27.2 billion intra-OIC tourism receipts, indicating a potential loss of USD 56.6 billion in 2020 (in comparison with the baseline scenario). The suspension of Hajj (pilgrimage), one of the key elements of the intra-OIC tourism activities, and the reduction in Umrah visitors were among the major reasons for the decline in intra-OIC tourist arrivals and receipts (see Box 3.3). In addition, the slowdown in economic growth, restrictions on international travel, and eroded confidence in international travel were other reasons that could explain the decline in intra-OIC tourism activities in 2020.

**Figure 3.6: Intra-OIC Tourist Arrivals (in Millions, left) and Intra-OIC Tourism Receipts (in Billion USD, right)**



Source: SESRIC staff calculations based on UNWTO data covering 39 OIC countries. \*The baseline scenario used the trend values over the period 2017-2019 to estimate 2020. Estimation in Scenario 1 used the UNWTO world averages of 73% decline in arrivals and 64% decline in receipts.

Despite the postponement of several international and regional events, some OIC countries have started to restart tourism activities during the pandemic under strict hygiene rules and vaccine regulations. For instance, the UAE hosted the EXPO 2020 in Dubai between 1 October 2021 and 31 March 2022. As of 31 March 2022, the event attracted more than 24.1 million visitors (Gulf News, 2022). A third of all EXPO 2020 visitors were international visitors. Around 20% of all international visitors originated from India (10%) and Saudi Arabia (10%) (The National News, 2022a and 2022b). Saudi Arabia also gradually opened its borders and lifted travel bans for Umrah visitors from abroad (provided that they meet hygiene and vaccine rules) from 01 November 2020 onwards (AA, 2020). Amid the ongoing pandemic, Qatar successfully hosted Arab Cup in 2021 and is set to host FIFA World Cup in 2022, which is expected to attract 1.2 million visitors from all over the world. Such international mega-events (e.g. tournaments, fairs, and



exhibitions) tend to increase not only international tourist arrivals in host countries but also have the potential to boost intra-OIC tourism activities (Daily Sabah, 2021).

### Box 3.3: The COVID-19 Pandemic and Islamic Pilgrimage (Hajj/Umrah)

Hajj is one of the largest annual religious gatherings in the world. Between 2016 and 2019, an average of 2.3 million Muslims performed Hajj annually, out of which 1.7 million pilgrims were from outside Saudi Arabia (General Authority for Statistics, 2019). Similarly, an average of 18.8 million Muslims performed Umrah annually between 2017 and 2019 (General Authority for Statistics, 2020). Hajj and Umrah pilgrimages generated more than USD 12 billion and these pilgrimages make up for approximately 30% of private sector income in the cities of Mecca and Medina before the pandemic (Raj and Bozonelos, 2020).

In light of health-associated risks with COVID-19, the Kingdom of Saudi Arabia “placed restrictions on performing the Hajj and Umrah for the first time in eight decades” in response to the pandemic starting in March 2020 (Ebrahim and Memish, 2020). As compared to the before the pandemic, in 2020, only 5.8 million Muslims performed Umrah and Hajj was opened to only around 1,000 pilgrims (General Authority for Statistics, 2020; Karadsheh and Qiblawi, 2020). To prevent the spread of COVID-19 during Hajj 2020, for example, Saudi Arabia’s Ministry of Health devised five eligibility criteria for Hajj pilgrims (Hashim et al., 2021). Furthermore, pilgrims were limited to a ‘safe bubble’ of 20 pilgrims with designated tracks; they were accompanied by trained health officers who received specialized training; pilgrims had to wear face masks at all times, they were not allowed to share personal items, and maintain a distance of 1.5m between themselves; pilgrims were provided with sterile pebbles and prayer mats and were not allowed to touch the Holy Ka’ba; and pilgrims had to quarantine for 14 days after completing Hajj. As a result of these measures, there were no confirmed cases of COVID-19 during or after Hajj in 2020 (Hashim et al., 2021).

In 2021, Saudi Arabia limited the Hajj pilgrimage to 60,000 citizens and residents between the ages of 18 and 65, barring all Muslims outside of Saudi Arabia from performing the pilgrimage (Hussain, 2021). Limiting the number of Hajj and Umrah visitors during 2020-2021 resulted in long waiting queues for individuals due to perform Hajj as part of national quota schemes, backlogs in Hajj and Umrah quotas, issues with refunding payments to individuals who were unable to perform pilgrimages (Muneeza and Mustapha, 2021). Therefore, the discontinuation of pilgrimages, imposition of travel and mobility restrictions, and social isolation measures are likely to affect the economic recovery of hospitality and travel industries in Mecca and Medina, exacerbated by the long-term socio-economic uncertainties caused by the pandemic.

Saudi Arabia has confirmed the participation of foreign pilgrims and is set to issue revised quotas for pilgrims for participating countries for Hajj 2022 (Mussa, 2022). While Saudi authorities are yet to release further details about Hajj 2022, the official statement specified that pilgrims would need to fulfil the basic requirement of being vaccinated against COVID-19. The government of the Kingdom of Saudi Arabia has also lifted several precautionary measures against COVID-19 before the beginning of Ramadan in April 2022 for pilgrims wanting to perform Umrah.



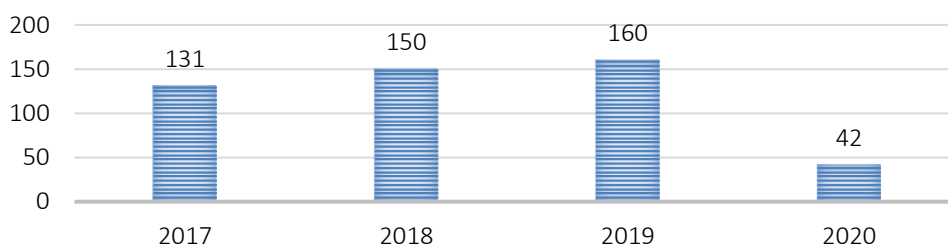
### 3.4 Islamic Tourism in the OIC Countries

The Islamic tourism market witnessed a rapid expansion over recent years and emerged as one of the fastest-growing segments in the global tourism market in terms of both tourist arrivals and receipts (SESRIC, 2020b). The number of tourists in the market increased by 43% over the period 2010-2018 (Mastercard and Crescent Rating, 2019). However, there are no globally standardized datasets on Islamic tourism that enable researchers to follow developments in the sector accurately, particularly in a cross-country context. Some proxy variables based on estimations and indices developed by some institutions like Crescent Rating and Dinar Standard are usually used to understand and follow the performance of the sector.

Despite having challenges with the availability of quality data, some available datasets bring a perspective on the sector's performance. In this respect, Figure 3.7 presents an overview of the performance of the Islamic tourism market at the global level based on the estimations of Dinar Standard (2020) and Mastercard & Crescent Rating (2021). Accordingly, the number of tourists in Islamic tourism increased from 131 million in 2017 to 160 million in 2019, corresponding to an increase of 22%. Nevertheless, the pandemic hit the growth momentum of the sector severely and the prevailing travel restrictions only allowed for 42 million international visitors in 2020 in the market, reflecting a 74% decline in tourist arrivals in the sector as compared to 2019.

The increased tourism activities among OIC countries have enabled tourists originating from OIC destinations to explore various tourist attractions. To this end, enhanced intra-OIC tourism activities have been one of the driving factors of growth in Islamic tourism, especially in the pre-pandemic period (SESRIC, 2020b). Yet, given the growth prospects of this niche tourism market, the OIC countries still need to exert more efforts to unleash its full potential and host more tourists both from OIC and non-OIC countries.

**Figure 3.7: Global Islamic Tourism, Arrivals (million)**



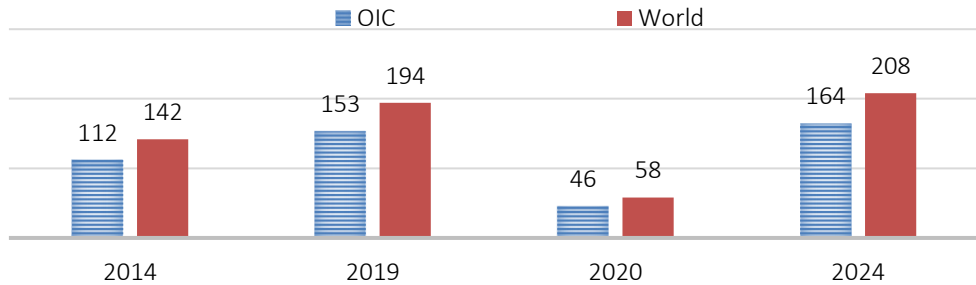
Source: Dinar Standard (2020) and Mastercard and CrescentRating (2021)

As in the tourist arrivals, a positive trend was observed in terms of tourism receipts before the outbreak of the pandemic in the Islamic tourism market. The worldwide Islamic tourism market size increased from USD 142 billion in 2014 to USD 194 billion in 2019 (Figure 3.8). Yet, due to the pandemic and widespread travel restrictions worldwide, its



size is estimated to fall by 70%, reaching USD 58 billion in 2020. With the gradual ease of restrictions, the market is expected to recover and is forecasted to reach USD 208 billion in 2024 (Dinar Standard, 2020). In the OIC region, the size of the Islamic tourism market expanded by 37% over the period 2014-2019 and reached USD 153 billion in 2019 (Figure 3.8). After seeing the bottom in 2020 (measured at USD 46 billion), the market size in the OIC group is expected to reach USD 164 billion in 2024.

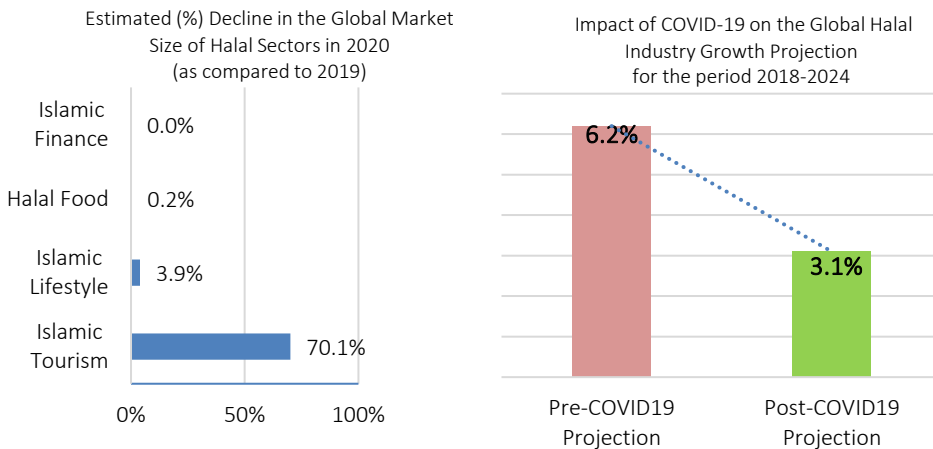
**Figure 3.8: Estimated Market Size of Islamic Tourism (USD Billion)**



Source: SESRIC staff calculations based on Dinar Standard (2020) and Thomson Reuters and Dinar Standard (2015)

Within the Halal industry, the biggest drop was observed in the Islamic tourism market (Figure 3.9, left) due to the widespread travel restrictions and other containment measures being implemented to contain the spread of the COVID-19 virus (SESRIC, 2022). Overall, in the short and medium-term, the COVID-19 pandemic has caused a change in the course of the development of the Halal industry including Islamic tourism. The growth projection of the Halal industry was downscaled from 6.2% to 3.1% for the period 2018-2024 (Figure 3.9, right).

**Figure 3.9: Impacts of COVID-19 on Halal Industry**



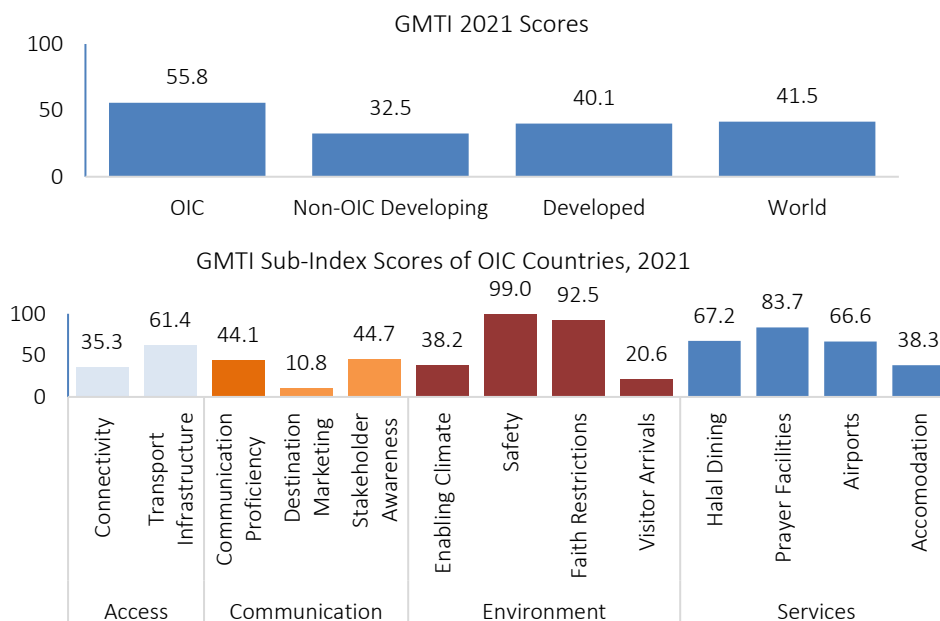
Source: SESRIC staff calculations based on Dinar Standard (2020)



## Performance of the OIC Countries in Islamic Tourism

The OIC countries, as a group, are major players in the Islamic tourism market worldwide thanks to their already existing Muslim-friendly ecosystem. In this respect, the OIC countries have obtained the highest scores in various indices developed in this domain like the Global Muslim Travel Index (GMTI).<sup>3</sup> In the 2021 edition of the GMTI, the OIC countries, as a group, obtained the highest average score (55.8) as compared to other country groups. In the same year, the world average was recorded at 41.5 (Figure 3.10, top). The OIC countries obtained particularly high scores related to the sub-index on the environment. In some dimensions like safety (99) and faith restrictions (92.5), their average scores exceeded 90. The OIC countries, on average, got the lowest score in destination marketing (10.8) under the sub-index of communication. On average, the OIC group also reported relatively low scores in visitor arrivals (20.6) and connectivity (35.3) that emerged as areas to be further invested in for the development of Islamic tourism (Figure 3.10, bottom).

**Figure 3.10: Global Muslim Travel Index Scores (top) and GMTI Sub-Index Scores of OIC Countries (bottom), 2021**



Source: Mastercard-CrescentRating (2021)

Note: A higher score implies better Muslim-Friendly Travel Environment

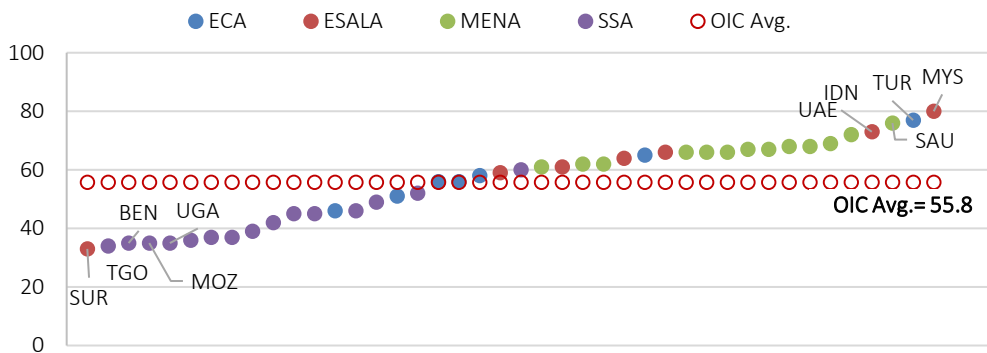
<sup>3</sup> The GMTI were developed by considering the four key factors to enable destinations to attract more Muslim travellers: Ease of **Access** to the destination; Internal and External **Communication** by the destination; **Environment** at the destination; **Services** provided by the destination. More than 40 datasets were used to calculate the GMTI.





At the individual OIC country level, 17 OIC countries obtained lower GMTI scores than the OIC average of 55.8 in 2021 (Figure 3.11). Most of these countries were located in the SSA in which the regional average was measured at 41.8. Suriname (33), Togo (34), and Benin (35) had the lowest GMTI scores in 2021. The top-performer OIC countries were concentrated in the MENA and ESALA regions of the OIC. In particular, Malaysia (80), Türkiye (77), and Saudi Arabia (76) were the OIC countries with the highest scores followed by Indonesia (73) and the United Arab Emirates (72).

**Figure 3.11: Performance of OIC Countries by Global Muslim Travel Index Scores, 2021**



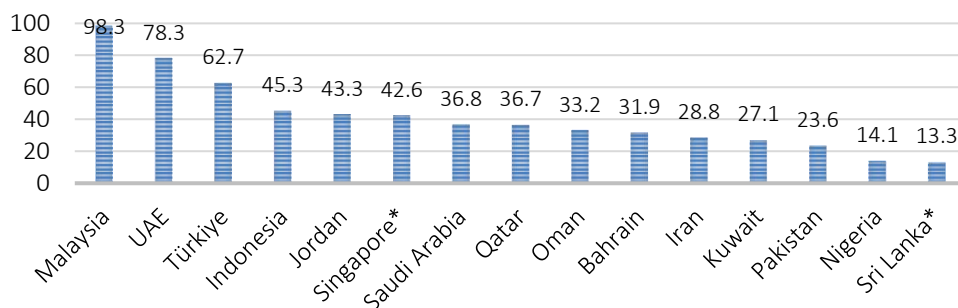
Source: Mastercard-CrescentRating (2021)

Note: A higher score implies better Muslim-Friendly Travel Environment. ECA, ESALA, MENA, and SSA represent sub-regional groups of the OIC countries, see Annex I and II for details.

In a similar vein, the Islamic tourism sub-index of the Global Islamic Economy Indicator (GIEI) ranks countries based on the state and development of the Islamic tourism ecosystem by taking the following four dimensions into consideration: financial, governance, awareness, and social. According to the 2020 scores, which exclude the impact of the pandemic, Malaysia (98.3), the United Arab Emirates (78.3) and Türkiye (62.7) obtained the highest scores (Figure 3.12). In the top-15 countries in the global ranking of the sub-index, two non-OIC countries namely Singapore (42.6) and Sri Lanka (13.3) were placed, reflecting the growing interest and investment from non-OIC countries in Islamic tourism given its high economic potential. Some non-OIC countries are placed also among popular destinations for Muslim travellers. Russia hosted 5.6 million Muslim travellers in 2019 and, in the same year, about 5 million Muslim travellers visited France (Dinar Standard, 2020). In this regard, many tourism stakeholders in such non-OIC countries have started to show growing interest in Islamic tourism and developed customized services for Muslim travellers, such as providing a prayer mat in the room or offering special buffets during the holy month of Ramadan.



**Figure 3.12: Top 15 Countries by Islamic Tourism Sub-Index Scores in GIEI, 2020**

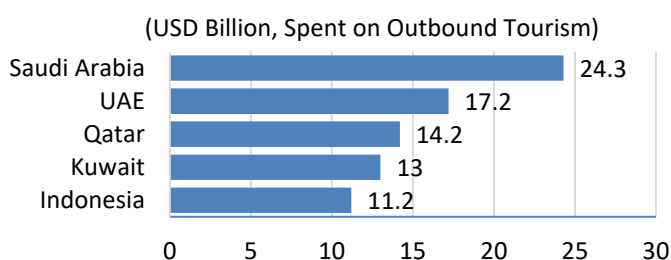


Source: Dinar Standard (2020)

Note: A higher score associates with a more improved Islamic tourism sector. \* denotes Non-OIC Countries

While the OIC countries are important players in terms of providing an enabling environment for the development of Islamic tourism activities, some of them are amongst the major source markets given their spending patterns in this niche market. In particular, the OIC countries located in the MENA region, such as Saudi Arabia (USD 24.3 billion), United Arab Emirates (USD 17.2 billion), Qatar (14.2 billion), and Kuwait (USD 13 billion), were placed among the top performer countries in the world in 2019 in terms of spending on Islamic tourism (Figure 3.13). These member countries were followed by Indonesia from South Asia with a USD 11.2 billion in outbound spending on Islamic tourism in the same year. These figures also reflect that there is a high level of concentration, especially in terms of source (origin) markets in Islamic tourism.

**Figure 3.13: Top Five Outbound Islamic Tourism Countries, 2019**



Source: Dinar Standard (2020)

Note: Figures are estimated values based on calculations of Thomson Reuters

### Efforts of OIC Countries and OIC Institutions for the Development of Islamic Tourism

A number of OIC countries like Malaysia, Indonesia, and the United Arab Emirates have developed a set of initiatives and policies to become more competitive in the global



Islamic tourism market. For instance, the Malaysian government has taken the following actions for the development and promotion of Islamic tourism across the country:

- a) setting up of the Islamic Tourism Centre (ITC) to assist the Ministry of Tourism and Culture;
- b) development of “Strategic Plan for Islamic Tourism Development” that outlines the way forward for Islamic tourism within Malaysia and undertakes the role of a guide by highlighting the critical factors and criteria for the implementation of Islamic tourism activities within Malaysia;
- c) establishment of Tourism Development Infrastructure Fund under the Ministry of Tourism and Culture to support the development of the tourism industry; and
- d) establishment of Halal Industry Development Corporation to coordinate the overall development of the Halal industry in Malaysia (COMCEC, 2016a; 2016b).

Similar policy actions and regulatory frameworks can also be seen in some other OIC countries like Indonesia and the United Arab Emirates, where the governments established dedicated committees to prepare Islamic tourism development strategies; work in close cooperation with the tourism service providers to raise awareness about the potential of the Islamic tourism market; address specific needs and demands of the Muslim travellers; support service providers in developing and getting the certification of Islamic tourism products and services; and improve destination marketing. For instance, the Ministry of Tourism and Creative Economy of Indonesia established a committee to develop and promote Islamic/Halal tourism in Indonesia. The committee is called the “Team for Accelerated Development of Halal Tourism”. Indonesia also launched the Indonesia Muslim Travel Index (IMTI) in late 2018 that ranks its provinces on their Muslim friendliness. The IMTI aims to create healthy competition among provinces in catering to Muslim travellers and provide better information to prospective visitors (Dinar Standard, 2019).

As a result of numerous policy efforts, major tourism players in such OIC countries have started to develop and offer products and services to Muslim travellers including Halal-certified food, prayer areas, and separate entertainment facilities for men and women. Many hotels have equipped their rooms with the Qibla sign, prayer mats, and copies of the Quran in rooms. In the food and beverages area, major restaurants and fast-food chains have started offering Halal food options while more specialized providers have completely Halal kitchens, and some obtained Halal certification for their operations (COMCEC, 2016b).

There are also a number of initiatives at the OIC level to support the efforts of the OIC countries to develop their Islamic tourism market. In this context, the ‘Strategic Roadmap for Development of Islamic Tourism in OIC Member Countries’ was adopted at the 10<sup>th</sup> Islamic Conference of Tourism Ministers (ICTM) in 2018 in Dhaka, Bangladesh. It sets a stage for cooperation among the OIC countries, OIC institutions, and relevant



international organizations in the field of Islamic tourism in five key specific thematic areas of cooperation, namely data and monitoring, policy and regulation development, marketing and promotion, destination and industry development, and capacity development.

Standards and Metrology Institute for the Islamic Countries (SMIIC) developed the Halal Tourism Services (HTS) Standards that were adopted in December 2019. The document has become available for the use of interested stakeholders in the Islamic tourism sector. These standards aim to ensure that products and services provided for Muslim travellers are standardized according to Islamic rules.

In recent years, several OIC countries like the Gambia and Suriname and a number of OIC institutions like the SESRIC and Islamic Centre for Development of Trade (ICDT) benefited from the COMCEC Project Funding Mechanism to strengthen the capacities of the national institutions and stakeholders of the OIC countries in the domain of Islamic tourism. In this regard, dozens of public officials and industry stakeholders benefited from a series of comprehensive training programs funded by the COMCEC to upgrade their skills and learn more about the Islamic tourism industry. The COMCEC also focused on the Islamic tourism market in three Tourism Working Group meetings in recent years to identify challenges and propose policy recommendations for the development of the sector in OIC countries.

The OIC City of Tourism Award was initiated in 2015 with an aim to galvanise intra-OIC activities in the awarded city, thereby developing the socio-economic potential of the city while scaling up intra-OIC trade in goods and services. The award is also expected to increase awareness and interest in Islamic tourism in the OIC countries, amongst other objectives. Al-Quds Al-Sherif was selected as the first “OIC City of Tourism” for 2015.

SESRIC organized several capacity-building programmes and seminars on Islamic tourism in Bangladesh, Türkiye, and Uzbekistan to enhance the skills and knowledge of tourism stakeholders and policymakers in the OIC countries. ICDT also organized several programmes in the domain of Islamic tourism for the benefit of various OIC countries like Suriname and Guyana. In addition, ICDT prepared and published a technical study on Muslim-Friendly Tourism Branding in the Global Market in 2018.

Overall, the exerted and ongoing efforts of the OIC countries and relevant OIC institutions in the domain of Islamic tourism are likely to help recovery efforts of the sector during the pandemic and upgrade their capacities for competition in the post-pandemic period, such as by upskilling and reskilling various stakeholders like hoteliers, tour operators, and regulatory bodies. In this way, the OIC countries will likely witness increased intra-OIC cooperation in this niche market.



# 4. Policy Responses and Recovery in the Tourism Sector



This section first overviews the policy responses of selected OIC countries during the COVID-19 Pandemic in mitigating the negative effects and supporting the recovery efforts in the tourism sector. Then, it provides a discussion on recovery expectations and key emerging trends that would affect the growth trajectory of the tourism sector in the OIC countries.

#### 4.1 Policy Responses of Selected OIC Countries during COVID-19 Pandemic

There is a wide range of policy responses in the OIC countries that focus on strengthening the tourism sector, supporting stakeholders in this sector, and restarting touristic activities. Successful policy responses in the tourism sector include, but are not limited to, “setting up an internal crisis management mechanism, virus containment measures and health protocols, fiscal and monetary policy measures, supporting employment, restarting tourism, reviving domestic tourism, and developing travel bubbles” (SESRIC, 2021).

In line with global developments, numerous OIC countries integrated their response to the COVID-19 pandemic as part of their national disaster management policies and systems. In countries like Algeria, Bangladesh, and Saudi Arabia, policies in the tourism sector were devised under the establishment of an internal crisis mechanism at the ministerial level. For example, Bahrain’s Tourism and Exhibition Authority has developed a ‘crisis management action plan’ including a communication strategy and solutions for media engagements with stakeholders in the tourism sector. Crisis management mechanisms in several OIC countries were directly responsible for the revival of the tourism sector. The Palestinian Ministry of Tourism and Antiquities, for instance, established a ‘Palestine Tourism Recovery Taskforce’ that is responsible for addressing the pandemic and includes members from the Ministry and private sector organizations. In Pakistan, the Tourism Recovery Action Committee (TRAC) under the leadership of the National Tourism Coordination Board (NTCB) has been tasked with developing recommendations for a sustainable recovery from the pandemic.

Given that the COVID-19 pandemic is a global public health crisis, policy responses in the tourism sector in a number of OIC countries include measures for containing the virus by instituting strict health protocols, ensuring adherence to standard procedures, and ensuring safe tourism for both visitors and workers (see Box 4.1). For example, Algeria’s Ministry of Tourism, Handcrafts, and Family Work has developed a set of ‘COVID-19 Health Protocols’ to guide safe reopening of the tourism sector by requiring hoteliers to establish monitoring and crisis cells to deal with urgent situations, mobilizing medical staff for the care of tourists and employees, special protocols concerning the operation of swimming pools and beaches, and protocols for receiving and registering guests.



#### Box 4.1: The COVID-19 Pandemic and New Hygiene & Safety Regulations

Global institutions, industry and regional stakeholders, and national authorities across all sectors have taken unprecedented efforts to develop hygiene and safety regulations, protocols, and standard operating procedures (SOPs) in an effort to respond to the COVID-19 pandemic and manage its implications. In the tourism industry, various international agencies have established set criteria, in cooperation with governments, health experts, and industry stakeholders, to minimize the negative impacts of the pandemic on the tourism sector and guide sustainable recovery from the pandemic.

World Travel and Tourism Council's (WTTC) 'Safe Travels' Stamp is one such protocol that establishes common SOPs to ensure safety for travellers and the travel and tourism industry workforce. For tourists, the Safe Travels stamp indicates that a business or operator has adopted WTTC's global health and hygiene standards and protocols. At present, WTTC's Safe Travels stamp has been imparted to the following OIC countries: Egypt, Gambia, Indonesia, Jordan, Kazakhstan, Maldives, Oman, Saudi Arabia, Tunisia, Turkey, UAE (sub-regions within the country), Uganda, and Uzbekistan (WTTC, n.d.).

Another example is International Organization for Standardization (ISO)'s global standard 'ISO/PAS 5643', which puts forth requirements and guidelines to reduce the spread of COVID-19 in the tourism industry. The guideline is meant to aid tourism providers to implement measures that prioritise safety and reassure tourists of the effectiveness of SOPs in place (Naden, 2021).

At the regional level, ASEAN Guidelines on Hygiene and Safety for Tourism Professionals and Communities "consolidate, adapt, and harmonize the various existing international and national standards, best practices, and guidelines as well as ASEAN Member States' national health and safety protocols, to reflect common regional parameters" (Australian Aid, 2021).

In addition to global and regional regulations and guidelines, several OIC countries have also introduced their own national regulations for the tourism sector. In Türkiye, for instance, the 'Safe Tourism Certification Program' sets out specific guidelines to ensure the health and safety of passengers and tourism sector employees, measures to be taken at tourist facilities, and measures to be taken in transportation vehicles (TGA, 2020). Similar examples for national travel and tourism hygiene and safety regulations include Abu Dhabi's 'Go Safe' Certification, Malaysia's 'Clean & Safe Malaysia' certification, and Uzbekistan's 'Safe Travels Guaranteed' campaign.

In Azerbaijan, the SAHMAN program, run jointly with a private international auditing company responsible for auditing and certifying tourism stakeholders, introduced nationwide health, hygiene, and safety standards and as of April 2021, approximately 12,000 monitoring sessions of tourism establishments had been conducted (Azerbaijan Tourism Board & Skift, 2021). Similarly, Saudi Arabia's 'Preventative Protocols for Tourism



Accommodation Facilities’, Türkiye’s ‘Safe Tourism Certification Program’, Palestine’s ‘COVID-19 Tourism Operation Manual’, and Qatar’s ‘Qatar Clean Program’ are all initiatives that establish an extensive list of protocols and measures to be undertaken by tourism establishments for the containment of COVID-19 and ensuring safe tourism.

More recently, the Ministry of Tourism, Arts, and Culture (MOTAC) in Malaysia, in consultation with industry organizations, has developed the Tourism Recovery Plan (TRP) as part of the National Tourism Policy 2020-2030. Amongst a list of objectives, the TRP focuses on revitalizing domestic tourism by offering attractive travel packages digitally; offering incentives and promotions via rebate vouchers, e-vouchers, and cashback to tourists; promotion of less-frequently visited rural tourist destinations; encouraging the use of technology for contactless tourism, and; easing regulations to ensure the recovery of the tourism industry by simplifying or waiving licensing fees, relaxation of fees for tour operators and licensed tour guides, waiving tourism license examination fees, and relaxation of license requirements of some tour operators (MOTAC, 2021). TRP also aims to restore confidence in Malaysia’s tourism sector by prioritizing public health measures such as hygiene standards, health and safety protocols, and compliance with standard operation procedures (MOTAC, 2021).

In fact, several OIC countries have turned to digital resources to support the tourism sector in a wide range of ways during the pandemic. Azerbaijan, for example, has adopted a strategy focusing on the development of new tourism routes and products (such as Azerbaijan 101) to educate travellers and showcase Azerbaijan’s natural touristic spots and training. Azerbaijan’s Tourism Board has also established the ‘Tourism Training and Certification Center’ to build skills and capacities of tourism sector workers that are vital to keep business running, protect jobs, and prepare qualified tourism professionals (Azerbaijan Tourism Board & Skift, 2021).

The consequences of the COVID-19 pandemic have been mostly economic in nature. With border closures, lockdowns, and supply-chain and service delivery disruptions, the negative economic impacts of the pandemic have been felt acutely in the tourism sector. In order to mitigate these impacts, the OIC countries have introduced and implemented a wide variety of economic stimulus packages for tourism stakeholders. For instance, at the peak of the pandemic, the Ministry of Tourism, Arts, and Culture (MOTAC) in Malaysia offered economic support to tourism companies under the PEMULIH, PEMERKASA, and PEMERKASA Plus stimulus packages, which included: (i) electricity bill discounts to hotels, theme parks, convention centres, shopping malls, and tour operators, (ii) one-off assistance of RM 3,000 for 5,335 tour agencies, RM 500 to 5,877 tour guides, RM 1,000 to 1,063 tour guides, and RM 600 to 2,861 homestay operators registered under the Ministry, and (iii) deferred monthly income tax instalments for tourism companies and





exemption from paying tourism tax and service tax until 31st December 2021 (MOTAC, 2021).

In a similar vein, Palestine exempted licensing fees for tourism establishments for the year 2020 and refunded 50% of Value Added Tax (VAT) dues to all tourism establishments. Similar examples can also be observed in Türkiye, Jordan, Uzbekistan, Egypt, Burkina Faso, Guinea, Indonesia, Jordan, Kazakhstan, and Bahrain including fiscal measures such as tax breaks or deferrals, subsidies, deferral or waiving of utility payments, coverage of the social security contributions of workers in the industry, and provision of lending lines with no interest or low-interest to support establishments (SESRIC, 2020a). In Egypt, the Central Bank extended credit lines for tourism organizations, and the government authorized hotels to reopen for domestic tourists at 50% capacity as early as May 2020 - given their compliance with hygiene and safety protocols including testing of workers, installation of disinfection equipment, assigning a dedicated floor to quarantine requirements, and implementation of social distancing measures (Reuters, 2020).

As part of the economic support provided to tourism establishments, the OIC countries also introduced policies for securing employment for tourism sector employees and protecting vulnerable workers by offering a range of stimulus packages to create jobs and minimize job losses. In Malaysia, for instance, the government's stimulus package (also applicable to the tourism sector) included a wage subsidy scheme for up to 500 workers per employer worth RM 600 per worker for 4 months (MOTAC, 2021). Similarly, in Saudi Arabia, private-sector workers affected by the pandemic were given 60% of their salaries and a social safety net package of USD 4.5 billion was introduced to support employment.

In Albania, a stimulus package adopted in April 2020 provided a one-off transfer of Lk 40,000 to employees of SMEs, employees of large businesses terminated due to the pandemic, and employees in the tourism sector. Similarly, the Tourism Recovery Action Committee (TRAC) and National Tourism Coordination Board (NTCB) in Pakistan have introduced special training programs for tour guides, drivers, interpreters, etc. to raise their skills and capacities and allow them to earn an income during the pandemic. TRAC and NTCB have also organized online training programmes and awareness webinars for tour operators, hotels, and restaurant workers on applying COVID-19 hygiene protocols and standard operating procedures, and organized awareness seminars and training on how to incorporate principles of sustainable tourism and hospitality (NTCB, n.d.).

Two years on, the COVID-19 pandemic has redefined what 'normal' means for tourists, tourism establishments, and the workforce in the tourism sector. In the tourism sector, adapting to a 'new normal' entails the restarting of touristic activities that can help tourism sector businesses in generating and recouping revenues, tourism workers earn an income, and restoration of confidence amongst tourists. Policies in this phase of the pandemic, and in the near future, focus on encouraging a recovery in tourism and there



are some OIC countries that have taken steps in this direction. Uzbekistan, for example, is offering USD 15 in bonus subsidies to tour operators and travel agents for bringing in foreign tourists. In Türkiye, tourism sector workers were included in a national priority list for receiving the vaccine so that they could start catering to visitors sooner than later. Airlines in the OIC countries, such as Etihad and Emirates, have formed agreements with the International Air Transport Association to ease travel restrictions, including the removal of quarantine measures on arrival, and incorporated the use of the IATA Travel Pass app considered to be a digital COVID-19 passport.

As a matter of fact, ‘vaccine tourism’ has emerged as one of the newer ways in which countries are attempting to boost their tourism sectors during the pandemic. For example, the United Arab Emirates, through its official Visit Dubai website, was one of the first countries to advertise touristic packages that include vaccination options during the stay (Sengel, 2021). Similarly, Maldives has implemented a 3V Strategy that encourages tourists to ‘visit’, ‘vaccinate’, and ‘vacation’ in the Maldives. Incorporating the vaccination element in the strategy allows tourists to travel to the Maldives without prior vaccine restrictions and receive their COVID-19 vaccine while staying in the Maldives.

There are also successful examples of how ‘travel bubbles’ have helped countries in opening their borders to tourists without the imposition of strict quarantine measures. Malaysia and Singapore, for instance, reopened their borders under one such agreement called the ‘Reciprocal Green Lane’ and ‘Periodic Commuting Agreement’. Brunei Darussalam with Singapore; UAE with Maldives, Italy, Bahrain, Greece, Seychelles, and Serbia; Qatar with Maldives; and Indonesia with Singapore also have similar ‘travel bubbles’ in force (Wego, 2022; Muthia, 2022).

While some OIC countries have taken measures to ease international travel, others have focused on boosting domestic tourism to recover from the pandemic. Malaysia, for example, has launched the ‘Cuti-Cuti Malaysia’ program, Uganda has introduced the ‘Take on the Pearl’ campaign, Azerbaijan has launched the ‘Macəra Yaxındadır’ (Adventure is Near) campaign, and Jordan has extended financial support of 6.5 million Jordanian Dinar to the domestic tourism sector. In Nigeria, the National Tourism Development Corporation (NTDC) launched the ‘Tour Nigeria’ campaign to drive domestic tourism, commercialize tourism, and generate employment (Premium Times, 2021).

Another notable policy development that has taken place in some OIC countries is the promotion of niche tourism segments. For example, in Central Asia, tourism boards of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan have come together to promote domestic ‘active/adventure tourism with the help of Adventure Travel Trade Association (ATTA) and USAID. Under this initiative, the five OIC countries will focus on responsible active tourism, attend three online COVID-19 Recovery Strategy Training webinars, develop, review, and implement safe tourism guidelines for adventure travel,



and consider new offerings for families, small groups, and self-guided programs (Kelly and Nikolova, 2020). Similarly, in Indonesia, ILO has come together with the Indonesian Ecotourism Foundation (Indecon) and UN to promote local 'eco-tourism' in West Nusa Tenggara (NTB) and East Nusa Tenggara (NTT) areas as part of a joint programme on COVID-19 Response and Recovery Multi-Partner Trust Fund. Through a five-day Tourism Development Training, residents in NTB and NTT areas who were reliant on tourism for their livelihoods were taught about improving the quality of tourism products, adapting to changing markets by tailoring virtual tour packages, and utilizing digitization, and managing tourist attractions sustainably (ILO, 2022).

## 4.2 Expectations for Recovery in International Tourism Activities

As of March 2022, after two complete years following the declaration of COVID-19 as a global pandemic by the WHO, the spread of the pandemic could not be fully stopped and new variants of the virus like Delta, Delta plus, and Omicron have deteriorated the quick recovery expectations in 2021 and early 2022.

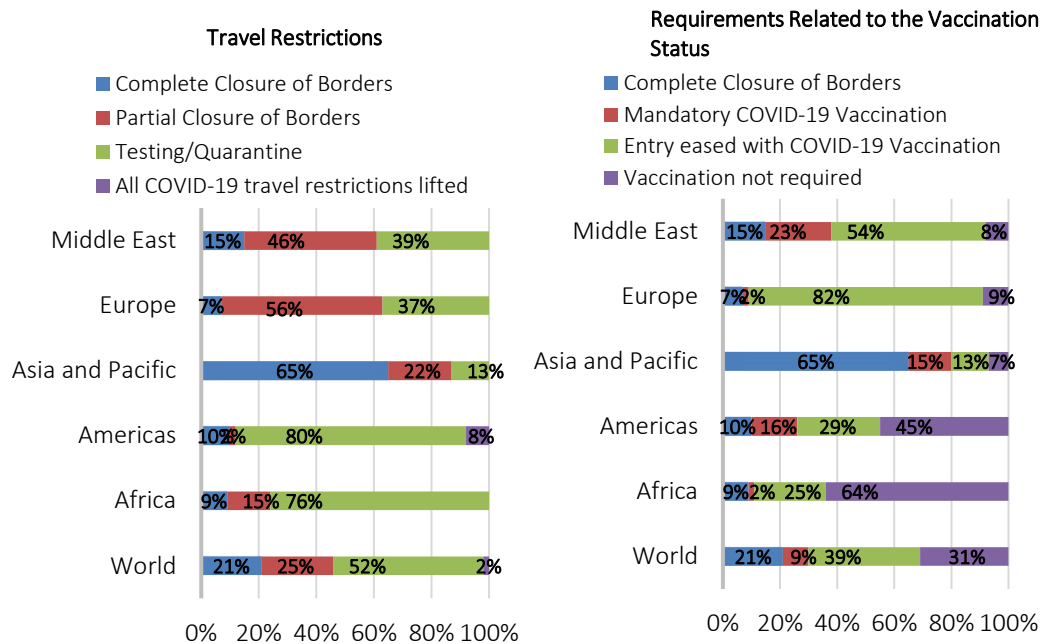
Even though many countries across the globe have gradually started to remove the travel restrictions and ease other impediments to international tourism (e.g. mandatory vaccination cards, PCR tests, etc.), such measures still are in place at varying degrees in 98% of all destinations. According to the UNWTO's 11<sup>th</sup> Report on COVID-19 Restrictions released on 1 November 2021, complete closure of borders still exists in 21% of all destinations worldwide. The destinations in Asia & Pacific (65%) and the Middle East (15%) have a relatively higher prevalence of this measure. Partial closure of borders is available in 25% of all destinations. The destinations in Europe (56%) and the Middle East (46%) mostly choose to implement this containment option for international travellers. Across the globe, around 52% of destinations still have some 'testing/quarantine' requirements for international travellers that discourage many tourists to visit them. This measure has been dominantly implemented by the destinations in the Americas (80%) and Africa (76%) where the vaccination rollout is relatively slower. As of 1 November 2021, only 2% of destinations lifted all COVID-19 travel restrictions worldwide (Figure 4.1, left).

When it comes to the specific requirements related to the vaccination status, 31% of destinations worldwide do not ask for a 'vaccination card/certificate' from international visitors. Yet, 9% of destinations have made it mandatory for all visitors. About 39% of destinations follow a mild measure that eases the entry of visitors with vaccination such as without asking for the result of a PCR test or enforcing quarantine upon arrival. At the regional level, the majority of destinations in Europe (82%) and the Middle East (54%) have the 'entry eased with COVID-19 vaccination' scheme (Figure 4.1, right). The destinations in Asia & Pacific still have the strictest measure, with 65% of them having complete closure of borders. About 64% of destinations in Africa do not ask for any COVID-19 vaccination for entry, which is the highest figure compared to other regions. The



‘mandatory COVID-19 vaccination’ is required mostly in destinations located in the Middle East (23%), the Americas (16%), and Asia & Pacific (15%) where the global average is only 9%.

**Figure 4.1: Regional Breakdown of Travel Restrictions and Requirements Related to Vaccination Status (% share of all destinations)**



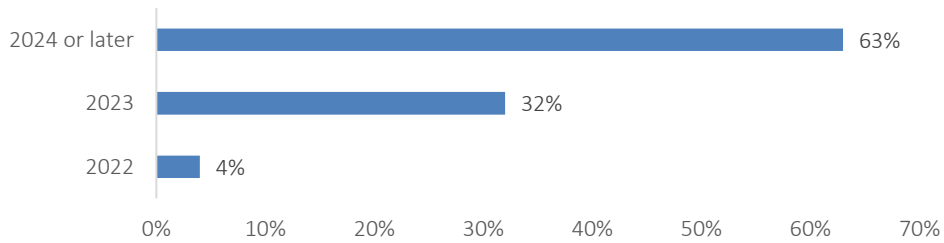
Source: UNWTO as of 1 November 2021, 11th Report on COVID-19 Restrictions

Despite all existing restrictions on travel and tourism as of 2022, most tourism professionals (61%) see better prospects for 2022 as compared to 2021 according to the UNWTO (2022) Panel of Experts. In particular, a widespread vaccination roll-out, followed by a major lifting of travel restrictions, and more coordination and clearer information on travel protocols are the main factors that improve the expectations of experts for the effective recovery of international tourism during 2022.

More specifically, 63% of the experts now expect international arrivals to return to 2019 levels only in 2024 or later given the widespread existing travel restrictions and measures put in place to contain the spread of the virus (Figure 4.2). Around 32% of them expect that this can be achieved by 2023. Only 4% of them foresee that the recovery can be achieved by the end of 2022.



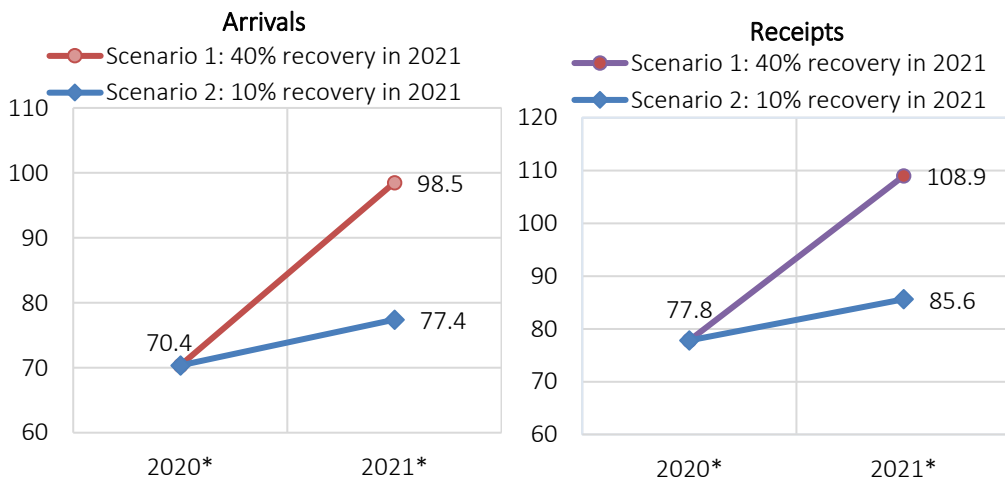
**Figure 4.2: Expected Return to Pre-Pandemic 2019 Levels in Tourism (% of Respondents)**



Source: UNWTO, World Tourism Barometer, January 2022 based on UNWTO Panel of Tourism Experts

Under those conditions, UNWTO (2021) released two scenarios for 2021 in terms of tourist arrivals and tourism receipts. Both scenarios estimated some recovery in 2021 but at varying speeds (40% vs 10%). By using those two scenarios of the UNWTO, Figure 4.3 presents projections made for the OIC countries for the year 2021. In the OIC group, international tourist arrivals are expected to see a surge in 2021 as compared to 2020 and were projected to range between 77.4 million and 98.5 million. This will translate into international tourism receipts between USD 85.6 billion and USD 108.9 billion. Despite having a better outlook in 2021 as compared to 2020, those figures are too far away from their recorded values in 2019, implying that the full recovery and reaching pre-pandemic levels will take a few years.<sup>4</sup>

**Figure 4.3: Outlook for Tourism in OIC Countries: International Tourist Arrivals (in Millions, left) and Receipts (in Billion USD, right), 2021**



Source: SESRIC staff calculations based on UNWTO May 2021 Barometer data covering 45 OIC countries.\*Forecasted figures.

<sup>4</sup> The official tourism statistics of the OIC countries are yet to be released by the UNWTO for 2020, 2021 and 2022 due to the pandemic.



The year 2022 started with high expectations in the tourism sector. Yet, the surge in the COVID-19 cases and the emergence of the Omicron variant have disrupted the recovery trajectory and lowered confidence through early 2022 as some countries started to reintroduce travel bans and restrictions for certain markets. Meanwhile, the vaccination rollout still remains uneven and many countries continue imposing some restrictive measures such as ‘border closures’ as discussed above. For example, according to the IATA data, as of January 2022, air travel was still half the levels recorded in the pre-pandemic year 2019. Data from ForwardKeys shows a 50% drop in international air bookings made between 1 January and 12 March 2022 (versus 2019) for any future travel particularly due to the emergence of the Omicron variant and eroded confidence in international travel (UNWTO, 2022b). In order to rebuild the confidence in the sector, tourism stakeholders have started to take a wide range of measures (see Box 4.2).

#### Box 4.2: The COVID-19 Pandemic and Confidence in Travel & Tourism

Travel and tourism sectors require the presence of confidence. In the lack of confidence or reduced levels of confidence, people tend to postpone their decisions and choose to stay at their usual place of residence. The COVID-19 pandemic has eroded the confidence in travel and tourism (Pangestu, 2021; Soni, 2020). As countries are returning to a ‘new normal’, building confidence in travel and tourism is a key factor that will fuel recovery in this sector. Around the world, public and private sector stakeholders have come together to identify vital factors that can help rebuild consumer confidence in travel and tourism that include, but are not limited to:

- ✓ Implement strong health, hygiene, sanitation, and safety protocols.
- ✓ Ensure that consumers are aware of governments overall crisis preparedness and management plans and policies.
- ✓ Encourage communication campaigns for not only consumers but also tourism workforce, investors, stakeholders, and partners.
- ✓ Utilize online sources to ensure consumers’ access to information.
- ✓ Embrace innovation and digitization in the travel and tourism sector to enable a ‘new normal’.

In 2022, UNWTO (2022a) projects a 30% to 78% growth in worldwide international tourist arrivals depending on various factors. Yet, those scenarios indicate that the end-of-year total international tourist arrivals would still be 50% to 63% below the pre-pandemic 2019 levels. In line with the estimations of the UNWTO, on average, the OIC countries would see an increase between 30% to 78% in international tourist arrivals in 2022. Nevertheless, such scenarios are being developed under certain assumptions. Any new development about the pandemic and additional shock could alter the outcomes.



In terms of the economic environment, the existing global macroeconomic imbalances stemming from, for example, the surge in energy prices, increase in inflation, expected rise in interest rates, high debt volumes, and the continued disruption in supply chains bring additional pressure on the effective recovery of international tourism in 2022 and such an unfavourable economic environment is expected to stay even in 2023 (IMF, 2022).

In particular, more recently, a crisis between Russia and Ukraine emerged on 24 February 2022- with the kick-off of a military operation in Ukraine. This has created a new challenge in the tourism market that could have devastating effects not only in Europe but also in other regions of the world due to the increased energy prices, fuelled uncertainties, as well as various travel restrictions and economic sanctions imposed by a set of countries. To this end, the UNWTO projections made in January 2022 are not likely to hold by the end of the year. It is definite that, while the world tourism market has been struggling to recover from the pandemic, the ultimate impact of this emerging crisis depends on a number of factors such as the duration of the military operations in Ukraine and the size and effectiveness of various response measures put in place by a number of European and North American countries (see Box 4.3).

### 4.3 Key Emerging Trends in the Tourism Sector

Although the COVID-19 pandemic has brought a number of challenges to the tourism sector, those challenges could be curbed with some interventions and supportive policies. In particular, some prevailing major trends in the OIC countries will ease the recovery in the tourism sector and help the sector to return to its positive growth trajectory seen before the pandemic. Among these trends summarized in Figure 4.4, the influence of the young population (generation Z) will be quite impactful as the OIC countries are home to over 338 million young people aged 15-24. With this, they host 28% of the world's total youth, and this number is projected to reach 30.7% by 2030 (SESRIC, 2020c). This demographic window of opportunity along with the high spending patterns of those young people especially through digital platforms will play a key role in the development of the tourism sector in many OIC countries.

An increasing number of Muslims are being influenced by social media and influencers living in both the OIC countries and non-OIC countries. There is also a growing interest in Halal in developed countries due to ethical and/or moral concerns. To serve this niche market, a set of global brands not only started to provide Halal products or services but also use such online tools or social media influencers in their campaigns to reach out to more people. Development of new technologies, innovation, and digitalization are all expected to play an important role by, inter alia, reducing the cost of time and energy for Halal certification, auditing, and transfer of money (SESRIC, 2022).



### Box 4.3: Implications of the Russia-Ukraine Crisis on the Tourism Sector

It is evident that the tourism sector in some OIC countries will be affected to a higher extent by the ongoing crisis between Russia and Ukraine. It is because some OIC countries generate significant tourism revenue through the two countries. In 2021, Turkey hosted 30 million international tourists, out of which 2.06 million were from Ukraine and 4.7 million from Russia (Shenoy, 2022). In total, travellers from the two countries made up 22.5% of all arrivals in 2021 in the Turkish tourism market. Also, some other OIC countries like Kazakhstan (1.06 million), the UAE (773 thousand), and Azerbaijan (665 thousand) hosted a significant number of Russian tourists in 2021 (Karadima, 2022). For international tourists originating from OIC countries located in Central Asia, Russia was among the leading destinations in 2019 and 2020. In 2019, Russia hosted 3.5 million visitors from Kazakhstan, 911 thousand visitors from Azerbaijan, 324 thousand visitors from Uzbekistan, and 331 thousand visitors from Tajikistan.

Based on the detailed figures from the State Statistics Service of Ukraine, Ukrainians who travelled abroad in 2017 totalled 26.4 million. Turkey (1.2 million visitors), Egypt (733 thousand visitors), United Arab Emirates (166 thousand visitors) and Kazakhstan (39 thousand visitors) were the four most preferred OIC countries by Ukrainians in 2017. In 2019, Ukraine hosted a significant number of tourists from a few OIC countries, namely Turkey (267 thousand), Azerbaijan (91 thousand), Kazakhstan (42 thousand), Uzbekistan (28 thousand), and Egypt (14 thousand), making up around 3.3% of all tourist arrivals in the country, based on the UNWTO data.

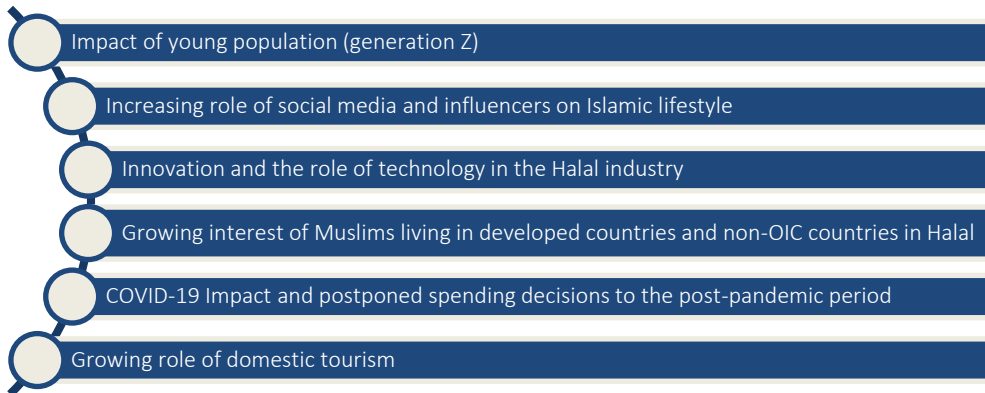
In this picture, the ongoing crisis between Russia and Ukraine could negatively affect some major OIC tourism destinations including, but not limited to, Turkey, Egypt, and the United Arab Emirates due to a likely substantial fall in the number of tourists originating from Russia and Ukraine in 2022. Nevertheless, if the ongoing crisis prolongs and more countries involve, 'international travel confidence' may also see a sharp fall in the second quarter of 2022. Coupled with the ongoing COVID-19 related restrictions, the impacts of the ongoing crisis between Russia and Ukraine will be more significant in some regions of the world and in a number of OIC countries. If the crisis comes to an end peacefully in a short time and the US & its allies start easing some sanctions imposed on Russia, the impacts of the crisis will likely stay relatively modest.

During the pandemic, many people, including Halal-conscious consumers, postponed their decisions such as purchasing a car or visiting another country. With the ease of pandemic restrictions, consumers are likely to start spending more in order to resume their normal life and realize their dreams. To this end, the growth prospects in the tourism market of the OIC countries are optimistic for 2022 and 2023.





**Figure 4.4: Major Trends Affecting the Tourism Sector in OIC Countries**

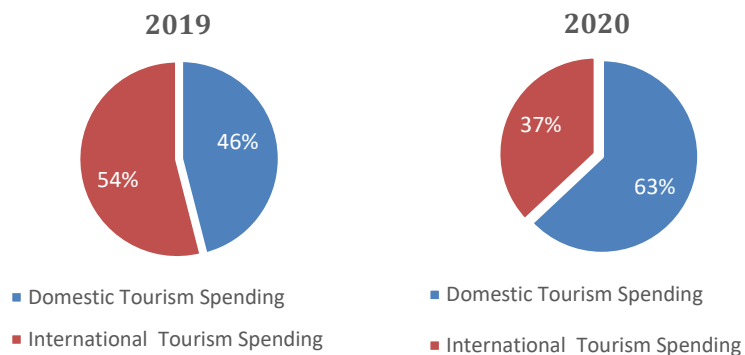


Source: SESRIC Staff Analysis

During the pandemic, in the existence of international travel restrictions, many countries around the globe paid special attention to domestic tourism activities as an alternative way to sustain and revive the tourism industry (UNCTAD, 2021). Many OIC countries, such as Uganda, Malaysia, and Jordan, have also followed suit and organized several campaigns to boost domestic tourism to support the tourism industry and economic growth in general.

The average share of spending on domestic tourism in all tourism spending jumped from 46% in 2019 to 63% in 2020 while the share of international tourism regressed from 54% to 37% in the OIC countries (Figure 4.5). According to WTTC (2021a) domestic tourism and travel close to home, as well as open-air activities, nature-based products, and rural tourism are among the major travel trends that will continue shaping tourism in 2022. In this regard, in the recovery efforts of the OIC countries, the positive role and the potential contribution of domestic tourism activities should not be underestimated and additional measures need to be developed to unleash its full potential.

**Figure 4.5: Domestic vs International Tourism Spending in OIC Countries (% share in total tourism spending)**



Source: World Travel and Tourism Council (WTTC)



**Table 4.1: Summary of Growth Opportunities and Challenges for Major Tourism Segments, 2021– 2022**

Segment	Opportunities for Growth	Challenges
Sun-and-sand	Will always be in <b>demand</b> even when limited.	<b>Climate change</b> may disproportionately affect coastal destinations, and COVID-19 may force destination-wide lockdowns.
Authentic cultural, religious, and community experiences	<b>Strong</b> if limited to small group gatherings.	Large events will be <b>limited by regulations, protocols, and/or low risk</b> threshold among visitors.
Self-improvement, transformational travel, educational travel, and wellness	<b>Very strong attraction</b> for visitors if protocols can be maintained. Strong desire for healthy options.	Rapid increase in offers due to market demand, <b>but weak enforcement</b> of standards might dilute the offers.
The great outdoors	<b>Very strong</b> building on pre- and coronavirus disease (COVID-19) period demand.	<b>Risk of excessive demand</b> overrunning nature-based destinations.
Theme parks	<b>Pent-up visitor demand</b> , but protocols will limit capacity to 2022.	More than 2 years may be required to ensure the highest <b>possible standards</b> in parks.
Luxury, exclusive travel	Already active during COVID-19 and <b>expected to grow</b> .	Requires significant investment to ensure a competitive product. <b>Seclusion and privacy</b> difficult to achieve at scale.
Business travel, meetings, incentives, conventions, and exhibitions (MICE)	Despite pent up demand recovery unlikely to meet pre COVID-19 levels as <b>remote work patterns hold</b> .	Ensuring safe and healthy conditions for groups. Businesses may be less willing to invest as heavily in MICE-related travel. <b>Challenging to overcome delegates'</b> own concerns around mixing in large, international groups.

Source: Adopted from UNWTO and ADB (2022)

In addition to the key trends summarized in Figure 4.4, UNWTO and ADB (2022) identified a set of opportunities and challenges in major tourism segments for the period 2021-2022 (Table 4.1). Those factors could also affect the performance of major tourism segments to varying degrees in the OIC countries. For example, in addition to the impacts of the pandemic, the extreme weather conditions (due to climate change) could constitute a



challenge for the growth of sun-and-sand tourism that would have implications for the pace of recovery in this segment. In fact, the rise of responsible tourism could be among the key trends to be followed during the recovery from the pandemic (see Box 4.4). Another example can be provided from the segment of authentic cultural, religious, and community experiences that the gatherings will continue in small numbers due to the habits that emerged during the pandemic. Yet, there is a growing demand for tourism activities in this segment due to the postponed events since March 2020.

#### Box 4.4: The COVID-19 Pandemic and Rise of Responsible Tourism

Responsible tourism refers to ‘making better places for people to live in and better places for people to visit’ and was devised by Responsible Tourism Partnership and Western Cape Tourism in the ‘Cape Town Declaration on Responsible Tourism’ in 2002 on the sidelines of the World Summit on Sustainable Development in Johannesburg, South Africa (Goodwin, 2014).

While the pandemic has jeopardized the tourism sector and revealed the fragility of ‘the intersection of tourism economics, society, and the environment’, it has also led to a growing demand for sustainable revival of the sector (Schlagwein, 2021; One Planet, 2020). During the pandemic, travellers have become more informed about how their travel choices can help ‘safeguard nature, cultures, and traditions’ (Preferred by Nature, 2021). According to a study by Eichelberger et al. (2021), since the beginning of the pandemic, tourists have displayed sensitivity to sustainability and have behaved responsibly in their choice of mode of travel and on-site at their destination. However, tourists behave responsibly only when operators have set rules and regulations, have disseminated relevant information to tourists, and have presented tourists with opportunities for responsible tourism.

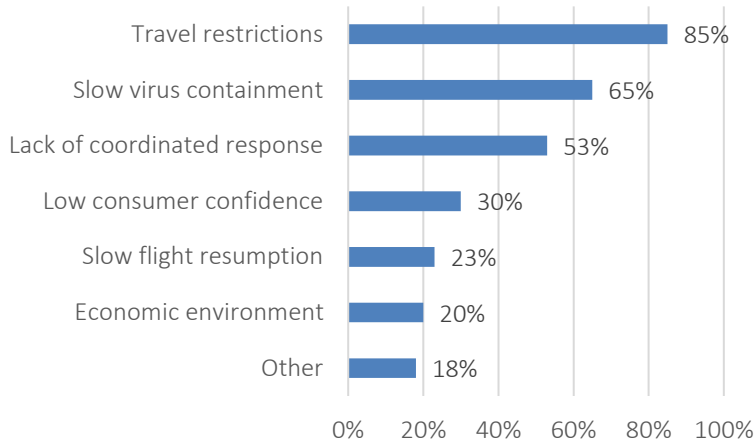
Therefore, by addressing existing issues such as burdens on destination capacity, overconsumption of natural resources, and the impact of tourism on climate change, the tourism sector can not only undertake responsible recovery from the pandemic but also build capacities to balance the needs of travellers, operators, and the environment in the future (One Planet, 2020).

Overall, the tourism sector somehow has begun to recover in 2021 and some negativities brought by the pandemic have started to diminish gradually. Yet, a number of factors influence the pace of recovery in the tourism sector worldwide. The UNWTO (2021) survey provides detailed information on the role of such factors. Accordingly, 85% of the respondent international experts pointed to the prevailing travel restrictions as the leading impediment factor that hinders the take-off of the tourism sector (Figure 4.6). The slow pace of virus containment is the second important factor, mentioned by 65% of the respondents. Lack of coordinated response (53%) and low consumer confidence (30%) were among the leading factors that affect the recovery. In this picture, the OIC countries



are recommended to pay more attention to those factors to mitigate the negative impacts of the pandemic during the recovery phase. Taking such factors into consideration in devising tourism policies would enable the OIC countries to build more resilience and accelerate the pace of growth in the sector.

**Figure 4.6: Factors that Affect the Recovery of International Tourism (% of Respondents)**



Source: UNWTO, World Tourism Barometer, May 2021 based on UNWTO Panel of Tourism Experts



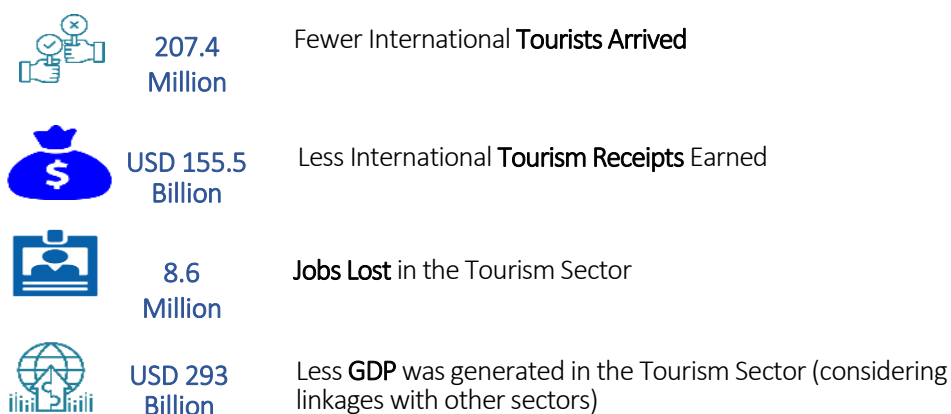
# 5. Concluding Remarks and Policy Implications



The international tourism sector has developed and become an important source of economic growth and development in many OIC countries over the recent decade. Yet, the COVID-19 pandemic has started to affect international tourism in the OIC countries severely since March 2020 and is likely to continue hitting the outlook in 2022 and beyond. The quantified impacts of the COVID-19 outbreak on the tourism sector of the OIC countries are devastating (SESRIC, 2020a).

The biggest crisis in the history of the tourism sector since World War II, the pandemic has got back the gains made in the OIC group over the past decade in areas such as international tourist arrivals and tourism receipts, intra-OIC tourism activities, job creation, and contribution to the GDP. Consequently, with the outbreak of the pandemic in 2020, the OIC countries, as a group, hosted 207.4 million fewer international tourists that led to a potential loss of USD 155.5 billion in terms of tourism receipts (foreign exchange earnings). With direct and indirect linkages of the sector, the pandemic resulted in a potential collapse of USD 293 billion in GDP and 8.6 million job losses in the OIC countries in 2020 (Figure 5.1). In terms of intra-OIC tourism receipts, an estimated USD 56.6 billion was lost due to a potential drop of 89 million in intra-OIC tourist arrivals in 2020.

Figure 5.1: A Summary: Impacts of the Pandemic on Tourism in OIC Countries in 2020



Source: SESRIC Staff Analysis based on UNWTO and WTTC datasets

The available datasets, as of March 2022, do not allow us to undertake a reliable and rigorous regional/individual country analysis of the OIC countries regarding their tourism performance during 2020-2021. In particular, the negative impacts of the pandemic in 2021 and 2022 in the OIC group are yet to be quantified, as key tourism statistics are still under preparation.<sup>5</sup> Nevertheless, some (provisional) available datasets imply that the

<sup>5</sup> Due to the pandemic, the collection and dissemination schedule of the international tourism statistics of the UNWTO have been disrupted.



performance of the sector was not very promising as the new variants of COVID-19 have emerged and global confidence in international travel and tourism has not been restored fully.

Based on the available information, it is evident that not all OIC geographical regions and member countries have been affected to the same extent by the outbreak of the pandemic. Regional disparities do exist and individual country performances vary depending mainly on the overall level of development of the tourism sector, the intensity and duration of containment measures as well as the presence of the stimulus and recovery packages addressing the tourism sector.

Major tourist destinations from various geographical regions like Malaysia, Saudi Arabia, Türkiye, and Indonesia reported significant losses such as in tourism receipts over the period 2020-2021. Yet, those OIC countries have sufficient diversity in their economies and alternative ways of generating foreign exchange for tourism, such as exporting manufactured or agricultural products. Nevertheless, the limited diversification of exports and heavy reliance on tourism activities limit the manoeuvre area of some OIC countries like the Gambia, Maldives, and Albania, where the share of international tourism receipts in total exports usually exceeds 50% (SESRIC, 2020a). Not surprisingly, such member countries could be affected to a higher extent due to a significant reduction in their foreign exchange earnings (Oguz et al., 2020).

While international tourism has been gradually recovering in some OIC destinations through 2021 and 2022, domestic travel continues to contribute to the recovery of the overall tourism sector, especially in several destinations with large domestic markets. Nevertheless, domestic and international tourism activities cannot substitute for each other. In particular, the importance of international tourism should not be underestimated as it remains a reliable and important source of foreign exchange earnings and has strong linkages with more than 185-supply side activities. To this end, the pandemic should not lead to a paradigm shift for tourism policymakers in the OIC countries. The predictions show that the pandemic is expected to affect international tourism activities in the upcoming few more years. In addition, the outbreak of the Russia-Ukraine crisis in March 2022 has eroded the quick recovery expectations in 2022. It is therefore essential to continue implementing a wide range of measures and policies to support tourism stakeholders and ensure the sustainability of operations in international travel and tourism.

It is of importance for the OIC countries to invest in the diversification of tourism products, focusing on some niche markets like Islamic tourism, ecotourism, and medical tourism both during and beyond the pandemic. Diversifying tourism activities in OIC countries will broaden their potential tourist base, helping them host more international visitors and build resilience in the tourism industry to future shocks. Some OIC countries have already



taken steps in this direction by developing some innovative ideas and practices since the beginning of the pandemic, which has helped them to compensate some portion of their losses gradually. For instance, Jordan has recently identified medical tourism and filming tourism as niche markets to be developed (UNWTO, 2021a).

While attempting to enrich existing tourism activities in the OIC countries, policymakers should pay more attention to the concept of ‘responsible tourism’ in order to protect the nature and contribute to sustainable development. In the post-pandemic period, an increasing number of destinations are expected to compete in the tourism market based on a new set of factors like low carbon footprint of tourism activities, efforts on the conversation of nature, and respect for local communities.

Restoring confidence and trust in the sector remains crucial, and convincing people to start traveling internationally will take some time. In this context, an increasing number of destinations are putting in place different measures including safety and hygiene protocols, the promotion of domestic tourism, and the creation of travel corridors or bubbles to ensure a safe restart of tourism. In this context, the OIC countries are recommended to follow up on international developments like the “Safe Travels Stamp” initiative of the WTTC. For instance, Saudi Arabia was one of the first OIC countries to adopt the global safety and hygiene protocols of the WTTC and receive the Safe Travels Stamp. By adopting a set of standards, some OIC countries have already started to reap benefits. For example, the UAE kicked off the EXPO 2020 in Dubai in October 2021 and hosted more than 24.1 million visitors by the end of March 2022 under the challenging conditions of the pandemic.

With the availability of the vaccines against COVID-19, recently, the OIC countries, like other countries around the globe, have started to use the silver bullet to fight the pandemic and restart international tourism activities. According to UNWTO (2021), 68% of international tourism experts expect that the vaccination rollout will contribute to the resumption of international tourism in 2021 and 2022. Despite all notable efforts exerted since 2021 in inoculation, many OIC countries still need to exert more efforts to speed up the pace of vaccination. As of 29 March 2022, people fully vaccinated per thousand population in the OIC group was measured at 377, whereas the global average reached 577, according to the SESRIC’s COVID-19 Pandemic Database. In other words, the existing pace of vaccination remains a challenge in some OIC countries.

The issues related to reciprocal recognition of vaccine cards/certificates continue to remain an impediment in many OIC countries. To address the problem of reciprocal recognition of certificates, some regional organizations developed solutions. For instance, the ‘EU Digital COVID Certificate Regulation’ entered into application on 1 July 2021, declaring that EU citizens and residents are able to have their “Digital COVID Certificates” issued and verified across the EU. It aimed to ease the resumption of tourism activities in





the region and help the recovery of tourism. In a similar vein, if the OIC countries could develop a similar scheme and speed up the vaccination rollout, it would help to restart international tourism in the OIC countries in a coordinated manner and enhance intra-OIC tourism activities.

There is a close link between health-related preventive measures and tourism policies in the wake of the pandemic. If the OIC countries can rapidly increase the share of vaccinated population, international tourism activities are likely to resume and recover as early as possible. To achieve this, it is essential to ensure effective coordination through established mechanisms among various authorities such as the Ministries of Health and Tourism. Having such coordination mechanisms and effectively utilizing them would help to reduce problems caused by interdepartmental coordination and communication matters.

The pandemic is considered as one of the biggest crises in the history of the tourism sector. Several OIC countries, such as Algeria, Saudi Arabia, and Bangladesh, have established an internal crisis mechanism/team at the level of the Ministry of Tourism with the objective to manage the negative impacts of COVID-19 on the sector. Beyond the pandemic, it is also recommended that all the OIC countries consider establishing such dedicated and trained teams at their respective ministries to build up resilience for future shocks (e.g. disasters, attacks, accidents, etc.) and deal with crises in a timely and effective manner. Equipping those teams with knowledge and working on various scenarios that could hit the tourism sector would help increase the resilience and preparedness of tourism stakeholders of the OIC countries and reduce the potential negative impacts of future shocks. As the sector gradually recovers, it is important to learn from this crisis so it can be more resilient in the future (WTTC, 2021b).

The pandemic has highlighted the importance of investing in digitalization whether it is in the education, health or tourism sectors. It is likely that digitalization and online solutions will be more dominant in the post-pandemic era. In the tourism sector, more countries have started to extensively utilize online marketing and promotion solutions in their tourism campaigns during the pandemic, as physical events like tourism fairs and exhibitions could not be held. Yet, not all OIC countries have access to such online tools and possess a sufficient number of trained staff. To this end, the OIC countries should invest more in digitalization in tourism. In addition, staff of the respective tourism entities should be equipped with knowledge and skills on how to use and manage new technologies in their daily work. This would increase the competitiveness of the OIC countries in international tourism while making their tourism industry more resilient.

The quality of infrastructure, human resources, and the existence of strong political willingness will all play a role in responding to the needs of the tourism sector in the OIC countries. In this context, investing in new physical infrastructure (e.g. hygiene kits, crowd



following and screening technologies, and rapid COVID-19 test equipment, etc.) and upskilling the capacities of staff through offering training programmes with a view to equipping them with new COVID-19 related health and hygiene protocols could help the OIC countries to become more competitive in the international tourism sector during and beyond the pandemic. In addition, the OIC countries should pay high attention to ensuring that vulnerable groups are not excluded from the COVID-19 recovery efforts in the travel and tourism sectors by offering them flexible working arrangements, extending support and legal protection, reducing barriers to employment, and providing customized training programs for them to upgrade their skills.

The OIC countries are very rich in terms of policy responses to mitigate the negative impacts of the pandemic on tourism and build resilience in the sector. Therefore, sharing of best practices and lessons learned during the pandemic in the domain of tourism would help to increase the capacities of national institutions in the OIC countries and help them in the process of building resilience for future shocks. They could serve as a source of inspiration for policymakers and, therefore, would stimulate the transfer of knowledge and experiences at the OIC cooperation level.

Moreover, enhancing intra-OIC tourism activities by easing bilateral visa policies, considering reciprocal recognition of vaccine cards, developing regional travel bubbles, and providing incentives (e.g. temporary tax cuts, subsidies) for airlines along with travel agencies would also help to minimize the potential financial losses during the pandemic and beyond, and could save many jobs that are affected by this exceptional shock.

In the end, it is a combination of various factors such as the availability of efficient public mechanisms, financial resources, and crisis-response preparedness that determines how and to which extent each OIC member country can successfully respond and recover from the unprecedented crisis that hit the tourism stakeholders. Yet, it is evident that the right policy mix at the national level and increased international and intra-OIC cooperation could help the recovery efforts of the OIC countries and minimize the losses recorded in the tourism sector.



## Annexes

### Annex I: List of OIC Member Countries

Afghanistan (AFG)	Albania (ALB)	Algeria (DZA)
Azerbaijan (AZE)	Bahrain (BHR)	Bangladesh (BGD)
Benin (BEN)	Brunei Darussalam (BRN)	Burkina Faso (BFA)
Cameroon (CMR)	Chad (TCD)	Comoros (COM)
Côte d'Ivoire (CIV)	Djibouti (DJI)	Egypt (EGY)
Gambia (GMB)	Gabon (GAB)	Guinea (GIN)
Guyana (GUY)	Guinea-Bissau (GNB)	Indonesia (IDN)
Iraq (IRQ)	Iran (IRN)	Jordan (JOR)
Kazakhstan (KAZ)	Kuwait (KWT)	Kyrgyzstan (KGZ)
Lebanon (LBN)	Libya (LBY)	Malaysia (MYS)
Mali (MLI)	Mauritania (MRT)	Maldives (MDV)
Mozambique (MOZ)	Morocco (MAR)	Niger (NER)
Nigeria (NGA)	Oman (OMN)	Pakistan (PAK)
Palestine (PSE)	Qatar (QAT)	Saudi Arabia (SAU)
Senegal (SEN)	Sierra Leone (SLE)	Somalia (SOM)
Suriname (SUR)	Sudan (SDN)	Syria* (SYR)
Tajikistan (TJK)	Togo (TGO)	Tunisia (TUN)
Turkmenistan (TKM)	Türkiye (TUR)	Uganda (UGA)
Uzbekistan (UZB)	United Arab Emirates (UAE)	Yemen (YEM)

\*Syria is currently suspended from its OIC membership.



**Annex II: Geographical Classification of OIC Member Countries**

<b>Sub-Saharan Africa (21): OIC-SSA</b>		
Benin	Gambia	Nigeria
Burkina Faso	Guinea	Senegal
Cameroon	Guinea-Bissau	Sierra Leone
Chad	Mali	Somalia
Comoros	Mauritania	Sudan
Côte d'Ivoire	Mozambique	Togo
Gabon	Niger	Uganda
<b>Middle East and North Africa (19): OIC-MENA</b>		
Algeria	Kuwait	Saudi Arabia
Bahrain	Lebanon	Syria*
Djibouti	Libya	Tunisia
Egypt	Morocco	United Arab Emirates
Iraq	Oman	Yemen
Iran	Palestine	
Jordan	Qatar	
*Syria is currently suspended from its OIC membership.		
<b>East and South Asia and Latin America (9): OIC-ESALA</b>		
Afghanistan	Guyana	Maldives
Bangladesh	Indonesia	Pakistan
Brunei Darussalam	Malaysia	Suriname
<b>Europe and Central Asia (8): OIC-ECA</b>		
Albania	Kyrgyzstan	Turkmenistan
Azerbaijan	Tajikistan	Uzbekistan
Kazakhstan	Türkiye	



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