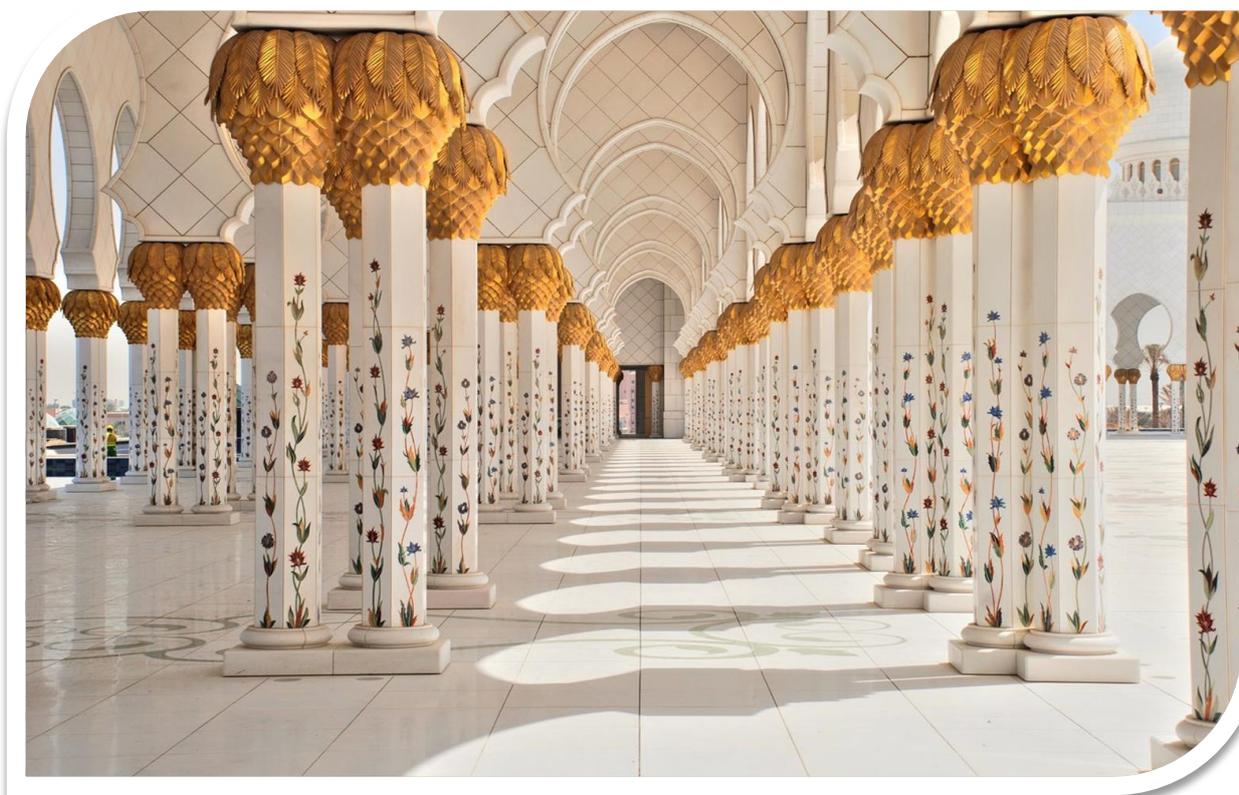# STRATEGIC ROADMAP FOR DEVELOPMENT OF ISLAMIC TOURISM

IN OIC MEMBER COUNTRIES

ORGANISATION OF ISLAMIC COOPERATION

STATISTICAL, ECONOMIC AND SOCIAL RESEARCH
AND TRAINING CENTRE FOR ISLAMIC COUNTRIES

STRATEGIC ROADMAP FOR DEVELOPMENT OF ISLAMIC TOURISM
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1   Introduction

Over the last two decades, Islamic life style market has been growing as Sharia'h compliant products and services (e.g. halal food, Islamic tourism and Islamic finance) have become an important component of the global economy. With an increasing awareness and expanding numbers of Muslim tourists, many tourism industry players have started to offer special products and services, developed and designed in accordance with the Islamic principles, to cater to the needs and demands of these tourists. Nevertheless, despite attracting significant interest across the globe, Islamic tourism is relatively a new concept in both tourism theory and practice. Not surprisingly, Islamic tourism activity remained highly concentrated in Muslim majority countries of the OIC, which are currently both the major source markets for the Islamic tourism expenditures and popular destinations. Islamic tourism is a natural-fit for these countries as the majority of them already has basic infrastructure and environment in place to meet the specific needs of Muslim tourists, and thus, have a comparative advantage over the others. Therefore, it is true to believe that, if planned and managed properly, Islamic tourism could play a significant role in revitalizing the economic development and growth and hence, spread the prosperity across OIC member countries.

1.1 Mandate

Considering the importance of Islamic tourism, the 9th Islamic Conference of Tourism Ministers (ICTM), held in Niamey, Republic of Niger on 21-23 December 2015 adopted a Resolution on Tourism Development among the OIC Member States, under which the ICTM decided to establish a Working Group on Islamic Tourism, which comprises of the Republic of Indonesia (Coordinator), People's Republic of Bangladesh, SESRIC, SMIIC and IUT and welcomed the offer of SESRIC to carry out a project on "Strategic Plan for the Development of Islamic Tourism in OIC Member Countries". As per this mandate, SESRIC has started the preparations. The draft Terms of Reference for the plan was submitted to the first meeting of the Working Group, which convened in Padang, Indonesia on 29 September 2016. This meeting discussed and agreed upon a process for conducting this project and decided the following:

> "For the purpose of having short term outcomes and benefits in developing Islamic Tourism for the OIC Member States, the Meeting requested the SESRIC to prepare a first draft of the Strategic Roadmap instead of Strategic Plan in collaboration with the members of the Working Group by February 2017. The Meeting also agreed to include Indonesia's proposals into the first draft of the Strategic Roadmap based on the following aspects: Policy and Regulations Development, Marketing and Promotion, Destination and Industry Development, and Capacity Building. The Meeting agreed to circulate the first draft of the Strategic Roadmap among the OIC Member States for their inputs. The Second Meeting of Working Group on Islamic Tourism will finalize the draft Strategic Roadmap for the submission to the next ICTM." (Report of the First Meeting of Working Group on Islamic Tourism, Article 10).

1.2 Objectives

The "Strategic Roadmap for Development of Islamic tourism in OIC member countries" is a framework which provides a systematic approach to promote cooperation among the member countries in this area for development and specifies the needed resources for anticipated changes. It outlines a guideline for the future development of Islamic tourism in OIC member countries via Islamic tourism standards and quality control drafts in management, operations and implementation.

The "Strategic Roadmap for Development of Islamic tourism in OIC member countries" also sets a stage for cooperation among OIC member countries, OIC Institutions and relevant international organizations in the field of Islamic tourism. The document identifies five key specific thematic areas of cooperation in the domain of Islamic tourism, namely data and monitoring, policy and regulation development, marketing and promotion, destination and industry development, and capacity development in order to enhance

cooperation at intra-OIC level as well as to improve Islamic tourism ecosystem in OIC member countries. It specially aims at:

- Providing a study on the background of Islamic tourism, aspects and dimensions and its importance in OIC member countries;

- conducting a situation analysis on the state of Islamic tourism in OIC member countries; and

- proposing a strategic direction to be taken with an action plan to develop and promote Islamic tourism in OIC member countries.

2   Islamic Tourism in OIC Member Countries

This section aims to provide a candid theoretical discussion on the definitions and dimensions of Islamic tourism by sifting through the tourism literature and reviews the emergence and state of Islamic tourism industry in the world in general and in OIC member countries in particular by analyzing the latest available information and statistics. A sub-section also provides a brief discussion on major challenges and opportunities for the development of Islamic tourism in OIC member countries. At the end, some broad policy recommendations have been listed for the consideration of OIC member countries both at the national and OIC cooperation levels as well as for the major stakeholders of tourism industry.

2.1   Islamic Tourism and its Components

Islam and Tourism

Travelling and journey are highly recommended by the Qur'an. Allah asked us to travel through the earth to take the lessons from His creation that He offers to us in His mercy (*Al-Quran 29:20*). It is a well-established fact that religion has influence on the day-to-day activities of Muslims, whether at home or travelling, and thus it shapes the choice of a destination for discretionary purposes and what is done at the destination (Jafari and Scott, 2014). Islam recognizes people's right to move from one place to other and encourages travelling for beneficial purposes including Hajj and Umrah (literally the higher and lesser pilgrimages, respectively), health and medication, education, business, trade, entertainment, and fun. However, words like "fun" and "entertainment" should be interpreted with caution as Muslims are allowed to seek fun and entertainment only in a way that does not go beyond the rules and obligations of Islamic Sharia'h (Saad et al, 2010). Therefore, in this context, tourism policy, development objectives and the management and operation of the industry will be greatly influenced by the Islamic principles (Scott and Jafari, 2010).

Islamic Tourism: Definitions and Dimensions

As it is evident from the name, Islamic tourism is mainly targeting people with Islamic beliefs in particular, though it could also have a universal appeal even for the non-Muslims due to a multitude of reasons like fair pricing, peace and security, family-friendly environment and hygiene etc. Islamic tourism as a concept has been used with different names and connotations in the tourism theory and practice. Halal tourism, Sharia'h Tourism and Muslim-friendly tourism are the most common terms, which are used alternatively. However, none of these terminologies has a universally understood definition (Crescent Rating, 2015). Moreover, there are some related terms such as 'Halal hospitality', 'Sharia'h compliant hotels', and 'Halal friendly travel' concerning the services in this sector.

Box 2.1: Major Components of Islamic Tourism

Halal Hotels: Some of the main indicators of an Islamic hotel include: no alcohol, gambling etc.; Halal food only; Quran, prayer mats and arrows indicating the direction of Mecca in every room; Beds and toilets positioned so as not to face the direction of Mecca; prayer rooms; conservative staff dress; Islamic funding; separate recreational facilities for men and women.

Halal Transport (Airlines): Major indicators for halal transport include: cleanliness; non-alcoholic drinks; and publications which are coherent with Islam.

Halal Food Premises: Foods that served in a restaurant have to be halal. All animals must be slaughtered according to Islamic principles. No alcoholic drinks should be served in the premise.

Halal Tour Packages: The content of the tour packages must be based on an Islamic themed. The Islamic tour packages include visits to the mosques, Islamic monuments and promote and event during the Ramadan.

Halal Finance: The financial resources of the hotel, restaurant, travel agency and the airlines have to be fit with Islamic principles. In general, Islamic finance requires participation in sharing the profit and loss among of all parties who involved in this finance enterprise. Islamic finance also prohibits interest.

Source: Adapted from Akyol and Kilinc (2014)

The major components of Islamic tourism are similar to those of conventional tourism like hotels, restaurants, logistics, finance, and travel packages. Evaluation of the value of tourism products in case of Islamic tourism, however, entails a completely different process due to the requirements of the Islam. These requirements are called Sharia'h-principles and at the simplest level, these principles "prohibit adultery, gambling, consumption of pork and other Haram (forbidden) foods, selling or drinking liquor and dressing inappropriately." In addition, a typical Muslim is expected to do regular prayers in clean environments and fast in Ramadan. In Islamic teachings, Muslims are also expected to abstain from unnecessary consumption and indulgence. In principle, Islamic tourism is about satisfying tourists looking for a destination that can fulfil their needs without being offensive in any way. It covers all tourism related goods and services that are designed, produced and presented to the market according to the Islamic rules (Hamza et al., 2012). Muslim tourists usually travel with family members and therefore, this concept is tailored around the travel needs of Muslim tourists who predominately seek a family friendly environment (Dinar Standard, 2015). All destinations that provide services and facilities that cater to at least some of the faith-based needs of Muslim visitors are categorised as 'Muslim Friendly Destinations' (Crescent Rating, 2015). At these destinations, tourists can count on feeling safe and secure, and can enjoy family-centred halal activities and have good time without worry.

The motivation for the Muslims to participate in tourism activity can be general (e.g., conducting business, visiting friends or relatives), pursuing other personal goals and activities (e.g., education, shopping) and pleasure, and/or specific Islamic motivations (e.g., spreading the message of Islam, Islamic values and culture, worshiping Allah (through Hajj and Umrah), strengthening the bond of silat al-rahim (fraternity) etc. Most of the general motivations are common for Muslims and non-Muslims. However, certain motivations for tourism which provoke pure hedonism and lavishness are not acceptable according to Islamic doctrine and these motivations can be considered non-Islamic or haram (Duman, 2011).

There is also a wide diversity in awareness and adoption of various Islamic practices by Muslim travelers. A significant number of Muslim tourists travel to global non-Muslim destinations such as Europe and adjust to any limitations by seeking alternatives to Halal Food, as well as other religious considerations such as prayer spaces. Meanwhile, a big segment travelling globally is also seeking options that address their religious considerations (Thomson Reuters and Dinar Standard, 2015). In a global survey jointly conducted by Dinar Standard and Crescent Rating, halal food, overall price and Muslim-friendly experience were ranked among the top-3 Muslim tourist market needs (Dinar Standard, 2015). While a large segment of Muslim tourists looking for these services, very few hotels, airlines and tourism destinations in fact tried to meet their demands.

Of course, while developing a strategy to address the Islamic tourism market, all major stakeholders like destinations, hotels and resorts, airlines and travel agencies need to consider the size of the flow of Muslim visitors to their destination. They also need to consider which faith related needs they will cater to such as Halal food, absence of alcohol, prayer spaces and Ramadhan services. Additional options include providing "women only" facilities, and incorporating Islamic heritage tours, among other options (Dinar Standard, 2015).

Box 2.2: Broad Concepts of Islamic Tourism

Economic concept: The economic concept for the Islamic tourism focuses on inclusion of new tourist markets and tourist destinations. This concept is the most widely discussed and understood in both Islamic and non-Islamic countries. Major tourism players, consider Muslim countries as one of the emerging tourist markets with huge economic, demographic and destination potentials. There are many regional and international forums like Islamic Conference of Tourism Ministers (ICTM) and the Arab Counsel of Ministers of Tourism (ACMT) to discuss and elaborate on economic dimensions of the Islamic tourism market. The third meeting of ICMT presented a new vision in this regard by adopting the "Riyadh Declaration", which aims to ease the visa, enhance the intra-OIC tourism investment, organize joint marketing events and facilitate the revival of Islamic cultural heritage.

Cultural concept: The cultural concept for Islamic tourism includes visions and ideas that outline the inclusion of Islamic religious cultural sites in tourism programs with "pedagogical" and self-confidence building elements. It tries to encourage a reorientation inside the tourist destinations towards less consumption and "western culture" loaded sites towards more Islamic historical, religious and cultural sites.

Religious conservative concept: The religious conservative concept for Islamic tourism is based on the conservative interpretation and understanding of Islam. Merging elements of the extremely conservative Islamic lifestyle with the modern tourism industry could indeed present new tourism options, spaces, and spheres. For a growing conservative intra Arab and intra Muslim tourism market, the implementation of a religious conservative concept in tourism planning as an extra option and as an insertion into the existing mainstream tourism could indeed have a positive economic and social effect.

Source: Adapted from Al-Hamarneh and Steiner (2004)

2.2   State of Islamic Tourism in OIC Member Countries

Islamic tourism is a recent phenomenon in the theory and practice of global tourism industry. Traditionally Islamic tourism was often associated with Hajj and Umrah only. However, recently there has been an influx of products and services designed specifically to cater to the business and leisure related segments of Muslim tourists across the globe. The Muslim tourism market has witnessed rapid growth over the years and emerged as one of the fastest growing segments of the global tourism market. Muslim tourism market (excluding the Hajj and Umrah expenditures of $20 to $25 billion) has increased from around $80 billion in 2006 to $145 billion in 2014, corresponding to an impressive increase of 81 per cent (Crescent Rating, 2015).

The size of the global Islamic tourism market grew by 4.9 per cent reached $151 billion in 2015. In details, $108.8 billion (corresponding to 72 per cent of the market size) of this spending was originated from OIC member countries (Thomson Reuters, 2016). On the other hand, Muslims living in non-OIC member countries spent about $42.3 billion (corresponding to 28 per cent of the market size) on Islamic tourism activities. It is projected that the size of the market will reach $243 billion in 2021 with an annualized growth rate of 8.3 per cent. The projected growth rate of the Islamic tourism market exceeds the estimated GDP growth rates of majority of OIC member countries. In this regard, OIC member countries should not underestimate the economic importance of Islamic tourism sector as a potential enabler for economic growth (Henderson, 2009).

The regional breakdown of the global Islamic tourism market reveals that it is highly concentrated in the Middle East and North Africa (MENA). In 2013, MENA region accounted for half of the total out bound

tourism expenditures made by the Muslim tourists. Among other regions, Europe and Central Asia (ECA) accounted for the second largest share of 25 per cent followed by East Asia and Pacific (EAP, 12 per cent) and Sub-Saharan Africa (SSA, 6 per cent).

Major Source Markets for Islamic Tourism

The 57 Member Countries of the OIC are the major source market for the global Islamic tourism industry. According to the latest estimates, more than three quarters (78 per cent) of the total 1.62 billion Muslims reside in OIC member countries. Nevertheless, Muslim tourists and tourism expenditures remained distributed unevenly across OIC member countries. Unsurprisingly, the resource rich OIC member countries in the Middle East remained the major source markets for the Islamic tourism. Among these countries, members of the Gulf Cooperation Council (GCC) emerged as the star performers with a convincing 37 per cent share of global Muslim travel expenditures. It is worth noting that GCC countries represent only 3 percent of the global Muslim population (Dinar Standard and Crescent Rating, 2012).

The top-20 global Muslim tourism source markets spread across the four continents, accounting for over three quarters (76 per cent) of the global Islamic tourism market in 2013-2014. The primary top source markets, in fact, are concentrated in the Muslim majority OIC member countries. As shown in Table 2.1, 14 out of 20 top markets are OIC member countries whereas six of them are Muslim minority countries from the Europe and America.

Saudi Arabia was ranked first with Muslim tourism expenditures of $17.8 billion followed by Iran ($14.3 billion), United Arab Emirates ($11.2 billion), Qatar ($7.8 billion), Kuwait ($7.7 billion), Indonesia ($7.5 billion) and Malaysia ($5.7 billion). These top seven source markets accounted for more than half of the total Muslim tourism expenditures. On the other hand, among the six Muslim minority source markets, Russia accounted for the largest share with $5.4 billion Muslim tourism expenditures followed by Germany ($3.6 billion), United Kingdom ($2.4 billion), Singapore ($2.3 billion), France ($2.3 billion) and United States ($2.0 billion). As a group, these countries accounted for around 12 per cent of the total Muslim tourism expenditures during 2013-2014.

Table 2.1: Top-20 Source Markets for Islamic Tourism, 2013-2014

Rank	Country	Size (US $ Billion)	Rank	Country	Size (US $ Billion)
1	Saudi Arabia	17.8	11	Germany	3.6
2	Iran	14.3	12	Egypt	2.8
3	United Arab Emirates	11.2	13	Azerbaijan	2.4
4	Qatar	7.8	14	United Kingdom	2.4
5	Kuwait	7.7	15	Singapore	2.3
6	Indonesia	7.5	16	France	2.3
7	Malaysia	5.7	17	Iraq	2.2
8	Russia	5.4	18	United States	2
9	Turkey	4.5	19	Morocco	2
10	Nigeria	4.4	20	Lebanon	1.9

Source: Thomson Reuters and Dinar Standard

Major Islamic Tourism Destinations

In the global tourism market, Europe is the most popular region in terms of number of arrivals. At the country level, France tops the list of the most popular destinations, followed by USA, Spain and China. Among OIC member countries, Turkey and Malaysia are ranked among the top global tourist destination. At the OIC level, Turkey is the most popular tourism market followed by Malaysia, Saudi Arabia, Morocco and United Arab Emirates.

The above mentioned rankings of the top tourist destinations are largely based on the conventional tourism criteria without giving due consideration to the fundamental requirements of the Islamic tourism. Over the years, several institutions have embarked on initiatives to develop special criteria to evaluate the performance of tourism destinations with respect to the compliance with the requirements of the Islamic tourism and rank them accordingly. One of the most famous and premier initiatives is the *Master Card-Crescent Rating Global Muslim Travel Index (GMTI).*

GMTI is made of several factors that constitute the Muslim tourists experience at a destination. As shown in Figure 2.1, this index looks at nine criteria in three areas for a destination. Each area is given specific weight according to its relevant importance. In the GMTI 2015, each of the Area 1 and Area 2 was assigned 40 per cent weight whereas Area 3 accounted for 20 per cent of the index score for a destination. Overall, 110 countries were studied and ranked in the GMTI 2015. The top-100 countries, which include 29 OIC member countries, accounted for over 95 per cent of the total Islamic tourism market in 2014.

According to the results of the GMTI 2015, Malaysia toped the index ranking with a cumulative score of 83.8. It was followed by Turkey with a score of 73.8 and UAE with a score of 72.1 (Table 2.2, left). In fact, nine out of the global top-10 Islamic tourist destinations are OIC members. Given the fact that the OIC member countries have a comparative advantage due to existing Halal ecosystem and Muslim friendly services, the results are not surprising. Nevertheless, there is a strong need for proactive policies and measures in OIC member countries to capitalize on existing pro-Islamic tourism environment and converting their comparative advantage into competitive advantage. In fact, most of OIC member countries are lacking basic requirements and coherent strategies to fully maximize their attractiveness to Muslim tourists (Master Card and Crescent Rating, 2015).

In contrast, many Muslim minority countries have made significant progress in catering for the needs and demands of Muslim tourists. Among these countries Singapore, Thailand, UK, South Africa, and France are top-5 non-OIC Islamic tourism destinations (Table 2.2, right). With a cumulative score of 65.1, Singapore is ranked even higher than the popular OIC destinations like Morocco and Brunei. In fact, majority of these non-OIC top Islamic tourism destinations are characterized by excellent tourism infrastructure and products and hence, sometimes they need very minimal changes in their strategies to cater to the needs of the Muslim tourists (Master Card and Crescent Rating, 2015).

Figure 2.1: Composition of the Global Muslim Travel Index (GMTI)
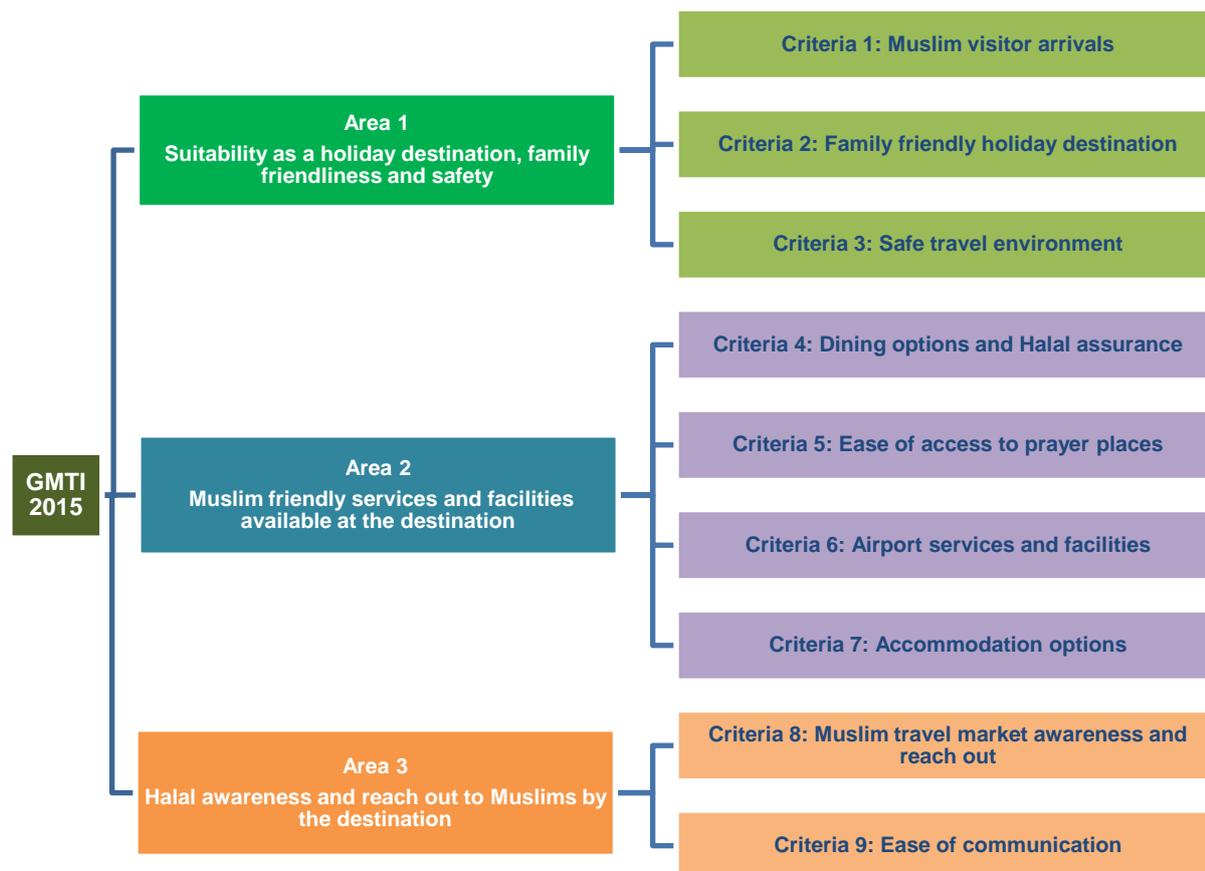
Source: MasterCard and Crescent Rating (2015)

Table 2.2: Top 10 OIC and Non-OIC Islamic Tourism Destinations

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

Source: MasterCard and Crescent Rating (2015)

2.3 Challenges and Opportunities for Islamic Tourism

Islamic tourism is a very recent phenomenon. Despite all the positive developments, the Islamic tourism market is still fragmented by the diversity of the meaning of halal, income level, awareness level, location and interpretation of religion. These are some of the main stumbling blocks to enhancing Islamic tourism activity in OIC member countries. Some of the specific challenges that limit the development of Islamic tourism in OIC member countries and available opportunities ahead of OIC member countries for development of Islamic tourism market are listed below.

Challenges

Lack of unified and global standards and certification: There are no unified international halal standards and certification arrangement for the tourism industry. In fact, in the majority of OIC member countries, there is no official body available at the national level to certify hotels and destinations according to the Islamic requirements.

Financial constraints: As a new emerging segment of global tourism industry, Islamic tourism has not received enough financial resources, perhaps, with growing number of success stories investors will give due attention to this niche segment by considering its potential and growing market size.

Gender: In many Muslim majority countries, female employment in the tourism sector is a problem due to various social and cultural reasons. Furthermore, women are also not allowed to travel alone in certain Muslim countries. Thus, a significant proportion of the global Muslim population is by-default eliminated from the Islamic tourism market.

Differences in the influence of Islamic values and beliefs: There is significant variation across OIC member countries regarding the understanding and influence of the Islamic values and beliefs. These existing differences are also reflected in their tourism development policies. While, some OIC member countries are more relaxed and welcoming towards the tourists, some others are more conservative and less interested.

Opportunities

Islamic tourism potential for economic growth: Provided the fact that many OIC member countries already have basic infrastructure and environment for catering to the needs of Muslim travelers, they can benefit more from the Islamic tourism market. Therefore, development of Islamic tourism could play a vital role in the economic growth and prosperity in these countries.

Innovative tourism products: There are opportunities for OIC member countries to bundle traditional pilgrimage and religious travel experiences with the activities related to culture and heritage to make unique and innovative tourism packages. For the destinations with Islamic and heritage sites, there is a growing opportunity to develop and market their potential by designing Muslim-friendly cultural tour packages.

Social media: Internet and social media provide a significant communication platform for introducing, positioning and marketing of the Islamic tourism brands, products and services to a wider audience.

2.4   Concluding Remarks and Policy Recommendations

There is a growing interest into Islamic tourism thanks to increasing level of awareness about the social, economic and cultural potentials of Islamic tourism. In fact, tourism is an important constituent of the OIC development agenda and over the years, several conferences and forums including nine Ministerial-level conferences have been organized to highlight the major issues and challenges facing the development of tourism in OIC member countries and formulate policy actions to address these challenges. Development of Islamic tourism has also gained greater importance in the agenda of the OIC and the First OIC International Forum on Islamic Tourism was organized in Jakarta, Indonesia on 2-3 June 2014.

In the light of the discussions presented in this section, some broad policy recommendations could be made for the consideration of OIC member countries at the national and OIC cooperation levels as well as for the major stakeholders of the industry.

2.4.1 National and the OIC Cooperation Level

Harmonization of policies and guidelines: There is a need for working out modalities and findings ways and means to harmonize the Islamic Tourism policies and guidelines in order to promote development of Islamic tourism and better cooperation among OIC member countries.

Sharing of expertise and experiences for the development of Islamic tourism: Among OIC member countries, there are leading Islamic destinations like Malaysia, Turkey and United Arab Emirates. Efforts

should be made to facilitate the transfer of knowledge and exchange of expertise among the emerging Islamic tourism markets and the top performing countries.

Cooperation for making a positive image: Peace and security are the most important elements for tourism development. Due to political instability and civil conflicts in some OIC member countries, there is an overall negative global media positioning of these countries. Furthermore, the phenomenon of Islamophobia is also on the rise across the globe. There is a need for joint action and cooperation at the OIC level to counter the negative media publicity and address the growing Islamophobia by highlighting the cultural and religious values and contributions of the Muslims to the history, culture, architecture and art. This will help not only to build up a positive image but also pave the way for development of Islamic tourism.

Organizing Islamic tourism events: There is a need for special conferences, workshops and forums both at national and OIC levels to introduce and advertise the Islamic tourism related products and services. Furthermore, events should also be organized to gather the major stakeholders in Islamic tourism market to share their experiences and best practices, and brainstorm the joint future policies and strategies.

Utilizing the media: Media can play an important role to foster and propagate Islamic tourism activities. To this end, OIC member countries should consider establishing dedicated satellite TV channel(s); publish special editions of popular magazines on Islamic tourism and launch large-scale social media campaigns.

Designing long-term strategies and master plans for the development of Islamic tourism market: Being the major source markets and beneficiaries of Islamic tourism, OIC member countries should develop a comprehensive; evidence based and long-term strategies for the development of a sustainable Islamic tourism sector both at national and OIC levels.

2.4.2 Industry Level

Ensuring Halal: Take necessary measures to ensure that all products and services provided for a halal conscious tourist are in accordance with the Islamic principles;

Training the staff: Train, educate and inform the staff and guides about the Islamic values, teachings and principals;

Facilitating the access: Prepare printed maps or develop applications that indicate the locations of mosques or prayer facilities, halal food restaurants and other related services;

Paying attention to diversity: Destination marketers need to identify and address the Islamic culture of different nationalities in order to be able to design packages that cater for their specific needs;

Proper accommodation management: Arrange the accommodation according to the Muslim needs like equipping every room with a pointer to direction of Qibla, providing praying mats and facilitating congregational prayers;

Information about halal food: Be well informed about the Halal food premises as one of the most important concerns for the majority of Muslim travelers. Get appropriate certification for halal food;

Offering gender specific facilities: Arrange separate entertainment facilities like swimming pools and Spas for women and men;

Appropriate dress code for the staff: Develop an appropriate dress code for the staff serving in hotels and other tourist services centres; and

Suitable marketing strategies: Develop and apply suitable marketing strategy in compliance with the Islamic teachings and morals for the advertisement and promotion of the Islamic tourism products and services.

3   Thematic Areas of Cooperation

This section focuses on five key thematic areas of cooperation for development of Islamic tourism in OIC member countries namely: data and monitoring, policy and regulation development, marketing and promotion, destination and industry development, and capacity development. Under each thematic area, first key concepts were explained. Then, a situation analysis for selected OIC member countries was provided in order to identify best-practices and find out common challenges for the development of Islamic tourism. Finally, key common challenges were summarized and some specific policy actions were listed both at the national and OIC levels for development of Islamic tourism.

3.1 Data and Monitoring

3.1.1 Significance of Data and Monitoring for Islamic Tourism

Data is still an unexplored treasure in many developing countries. Given the continuously increasing volume of data produced every day, this unexplored treasure indeed presents new opportunities for policy planning and implementation concerning all socio-economic sectors if to be produced and processed appropriately. But why would anyone care about data? Data has to be cared about because according to Davenport and Prusak (1998), data is the raw material for paving the way to decision making. Data is deemed of good or high quality if it is accessible, accurate, complete, relevant, reliable, timely, valid, and with metadata (Three Rivers District Council, 2008 and Fink, 2015). Drucker (1988) describes information as data endowed with relevance and purpose. In connection with this reasoning, we can define information as data that is manipulated and/or contextually related to any category, given shape to be meaningful, reveals extant order and directional movement, and contributes to our understanding of the world.

Understanding the interactions between data and information is also of vital importance for the monitoring processes. According to UNDP (2009), monitoring can be defined as the ongoing process by which stakeholders obtain regular feedback on the progress being made towards achieving their goals and objectives. From this perspective, indicators; i.e., a measure based on verifiable data that conveys information about more than just itself, are an essential aspect of the monitoring process as reporting progress relies on the analysis carried out on the indicators with available data. IFRC (2011) states that monitoring is important because it provides information to support programme implementation, contribute to learning and knowledge sharing, uphold accountability and compliance, provide opportunities for stakeholder feedback, and promote the work carried out.

A monitoring work-flow for Islamic tourism should start with having a universally agreeable Islamic tourism definition including its related components, identifying national targets, and having a detailed analysis of the current situation of Islamic tourism in the country in accordance with the agreed definitions. The higher the quality of data to be used for analyzing Islamic tourism, the better the decisions for allocating existing capacities and making investments for the development of Islamic Tourism in the country. The analysis should also indicate the critical gaps in Islamic tourism at the country and even regional levels to be focused on for assuring effective monitoring in the future. At the end, the monitoring exercise should contribute to the management and decision making processes in sustaining the growth of the Islamic tourism industry.

In order for monitoring to produce the relevant information flow to the decision making processes, the steps to develop and implement a tourism impact monitoring plan should include planning for monitoring, developing a monitoring plan, conducting monitoring and applying results, and evaluating and advancing monitoring (The Nature Conservancy, 1999).

3.1.2 Tourism and Islamic Tourism from a Statistical Perspective and Challenges in Measuring Religious Tourism

Tourism undeniably plays a significant role in the member countries of the Organisation of Islamic Cooperation (OIC) because of its socio-economic development potential. If tourism can be measured in all its parts, it will for sure contribute to the facilitation of the decision-making processes. From this standpoint, a sound tourism statistics system in OIC member countries is critical not only for monitoring the national tourism policies but also observing the impact of tourism at the OIC and international levels.

Adopted by the Fourth Extraordinary Session of the Islamic Summit Conference on 14-15 August 2015 in Makkah Al-Mukarramah, Kingdom of Saudi Arabic, the Strategy of the OIC Standing Committee for Economic and Commercial Cooperation (COMCEC) includes tourism as one of its six cooperation areas. The COMCEC Strategy specifically states that 'tourism data collection in many OIC member countries is inadequate due to either limited capacity in data collection or lack of awareness regarding its importance. Unavailability of reliable data hampers producing a sound analysis of the sector and hence, an effective cooperation framework' (COMCEC, 2012).

Additionally, a COMCEC (2016a) study highlighted the significance of data and monitoring for Muslim Friendly Tourism by stating "collecting data on Muslim tourist arrivals and receipts is a valuable way to encourage business to cater to the MFT market when the numbers are already attractive".

From the statistical perspective, World Tourism Organisation considers tourism as a phenomenon for which statistical representation has its particular challenges because of its special nature (UNWTO, 2010). Most tourism indicators have traditionally been physical (non-monetary) and have focused on the description and measurement of flows of visitors associated with inbound tourism. As the apex body of the tourism at the global level, UNWTO defines tourism as a subset of travel. In this respect, it would be wise to concentrate on the following terms to better understand what tourism is statistically about:

- *Travel* refers to the activity of travelers. A traveler is someone who moves between different geographic locations for any purpose and any duration.
- Travel within a country by residents is called *domestic travel*. Travel to a country by non-residents is called inbound travel, whereas travel outside a country by residents is called outbound travel.
- Those who undertake *travel*, be it domestic, inbound or outbound, are called domestic, inbound or outbound travelers, respectively.
  - A *trip* refers to the travel by a person from the time of departure from his usual residence until he/she returns: it thus refers to a *round trip*. A trip is made up of visits to different places.
  - An *inbound trip* will correspond to the travel between arriving in a country and leaving, whereas a *domestic trip* or an *outbound trip* will correspond to the travel between leaving the place of residence and returning. A *domestic trip* has a main destination in the country of residence of the traveler, while an *outbound trip* has a main destination outside this country.
  - A *visitor* is a traveler taking a trip to a main destination outside his/her usual environment, *for less than a year*, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips. *Tourism refers to the activity of visitors*.
  - A domestic, inbound or outbound traveler on a tourism trip is called a *domestic*, *inbound* or *outbound visitor*, respectively.
  - Furthermore, the travel of domestic, inbound or outbound visitors is called *domestic*, *inbound* or *outbound tourism*, respectively.

- *Tourism is therefore a subset of travel and visitors are a subset of travelers.* These distinctions are crucial for the compilation of data on flows of travelers and visitors and for the credibility of tourism statistics.
- A visitor (domestic, inbound or outbound) is classified as a *tourist* (or *overnight visitor*) if his/her trip includes an overnight stay, or as a *same-day visitor* (or *excursionist*) otherwise.

Although *main destination* (*place visited that is central to the decision to take the trip* or *place where visitor spent most of his/her time during the trip* or *place that is the farthest from the place of usual residence*) characterizes a tourism trip, other characteristics also help classifying trips including:

- Main purpose
- Types of "tourism product"
- Duration of a trip or visit
- Origin and destination
- Modes of transport
- Types of accommodation

For the scope of this document, the '*main purpose*' of a trip will be firstly taken into consideration. UNWTO (2010) defines the *main purpose of a trip* as the purpose in the absence of which the trip would not have taken place. The main purpose of a trip helps to determine whether it qualifies as a tourism trip and the traveler qualifies as a visitor. Information on the purpose of the tourism trip is useful for characterizing tourism expenditure patterns. It is also important in identifying key segments of tourism demand for planning, marketing and promotion purposes. In the case of travel parties in which members might have different individual purposes, the main purpose of the trip should be the one that is central to the decision to take the trip. The classification presented below in Table 3.1.1 elaborates on previous classifications and incorporates new categories that have been gaining in importance since the issuance of the 1993 Recommendations on Tourism Statistics.

Table 0.1.1: Classification of Tourism Trips According to The Main Purpose

1. Personal	2. Business and Professional
1.1 Holidays, leisure and recreation	
1.2 Visiting friends and relatives	
1.3 Education and training	
1.4 Health and medical care	
1.5 Religion / pilgrimages	
1.6 Shopping	
1.7 Transit	
1.8 Other	

Source: UNWTO (2010)

For the statistical measurement, each tourism trip has one and only one main purpose though a visitor can also undertake secondary activities while on his/her trip. Despite its emerging share among the other categories of '*main purposes*', the UNWTO (2010) definition for *Religion / Pilgrimage* is not comprehensive enough and states '*This category includes, for example, attending religious meetings and events, pilgrimages, etc.*

However, the Core Module of the Proposed Basic Questions for Measuring Flows and Expenditure Associated to Inbound Tourism in UNTWO (2016) includes a question on main purpose of tourism trip:

- What was the main reason for visiting this country? (Choices include the classification of tourism trips according to the main purpose as shown in Table 3.1.1)

and the example border survey questionnaire for illustration in the same document asks more specific questions pertaining to the religious tourism trips such as;

- Reasons for one-day stay in the visited country (for excursionists without overnight stay; choices include the classification of tourism trips according to the main purpose)
- Reasons for one-day stay in the visited country (for tourists with at least one overnight stay; choices include the classification of tourism trips according to the main purpose)
- Which of the following activities have been taken part in or spent time doing in the visited country? (Choices include 23 different activities including 3 activities that may be related to religious activities such as visiting religious places, visiting heritage sites, and pilgrimage)

On the one hand, the definition of Lefeuvre (1980) on religious tourism [*a system that encompasses a range of holy places, from the grandest cathedral to the smallest chapel, the service facilities associated with them and the spectrum of visitors from the devout to the secular*] finds broader adoption in the Western literature; on the other hand, there is no unique and universally accepted definition of Islamic tourism (Crescent Rating, 2015). Due to varying and even lack of definitions, it is not easy to find internationally comparable Islamic tourism data in sources such as the UNWTO's Compendium of Tourism Statistics (2017).

The definitions found in the extant literature also focus on the other perspectives other than the '*main purpose of tourism trip*' such as Hamza et al. (2012) classify *all tourism related goods and services that are designed, produced and presented to the market according to the Islamic rules* as Islamic tourism which is broader than the definitions based on '*main purpose of tourism trip*'. This also brings us to the concept of '*tourism product*'.

UNWTO (2010) defines '*tourism product*' as *a combination of different aspects (characteristics of the places visited, modes of transport, types of accommodation, specific activities at destination, etc.) around a specific centre of interest*. In this connection, Islamic tourism emerges as a '*tourism product*'. As a matter of fact, the UNWTO (2010) gives the flexibility to member countries to develop, in addition to the basic data covered in International Recommendations for Tourism Statistics (IRTS) 2008, supplementary data and indicators relevant for key tourism stakeholders, derived from official and non-official sources, and consistent with the concepts and classifications presented in IRTS 2008 and used in UNWTO (2016). Delegating the development of data and indicators on specific 'tourism products' to the member is a required step since

- *Accommodation for Visitors* (5510, 5520, 5590, 6810, 6820) and *Food and Beverage Serving Activities* (5610, 5629, 5630) under the current List of Tourism Characteristic Activities (Tourism Industries) and Grouping by Main Categories According to International Standard Industrial Classification of All Economic Activities (ISIC) Revision 4; and
- *Accommodation Services for Visitors* (63111, 63112, 63113, 63114, 63120, 63130, 63210, 63290, 72111, 72123, 72211, 72213, 72221, 72223) and *Food and Beverage Serving Services* (63310, 63320, 63399, 63400) under the current List of Tourism Characteristic Products and Grouping by Main Categories According to Central Product Classification (CPC) Version 2 in IRTS 2008

do not directly address religious-friendly tourism activities and products. Having this flexibility, however, raises the questions of harmonizing different approaches developed by official and non-

official sources and making the internationally comparable indicators and data available in line with IRTS 2008.

The religious tourism data gap has long been an issue in the international statistics arena. The First International Conference on Tourism, Religions and Dialogue of Cultures that was held in 2007 in Cordoba, Spain by the UNWTO is among one of the first global events to underline the difficulty in measuring religious tourism flows. The Cordoba Conference as well highlighted that the measurement and the management of the flow of persons during [religious] mega-events should also be taken into consideration for the sustainable development of religious tourism. It went on also to question about how the flow of pilgrims and visitors be measured whose answer will, within the religious tourism domain, contribute to the application of the twelve aims (*Economic Viability, Local Prosperity, Employment Quality, Social Equity, Visitor Fulfilment, Local Control, Community Well-being, Cultural Richness, Physical Integrity, Biological Diversity, Resource Efficiency,* and *Environmental Purity*) for an agenda for sustainable tourism as put forward by UNEP and UNWTO (2005). The Cordoba Conference reached a concluding statement that '*Insufficient information and/or the absence of reliable data regarding the volume, the dynamics and the characteristics of religious tourism flows represent one of the major obstacles to the development of tourism strategies on the part of local, regional or national public organisations and partners in the private and/or associative sector*'.

UNWTO (2011) even strengthens this finding at the regional level by stating that statistics on religious tourism of Asia and the Pacific are limited or vague. The study related this shortcoming partly due to the close link between religion and culture in Asia where it is difficult to separate the motivation of travel except in the specific case of pilgrimages and religious festivals. According to the study, practically all Asian archaeological monuments have some connotation to religion and form the backbone of tourist circuits. Therefore, it is difficult to differentiate between the cultural and the religious tourist. As with the Tourism Satellite Accounts (TSA) there is a need for more and precise information on religious tourism as opposed to cultural tourism. The study leaves to the stakeholders to glean this information as accurate and universally applicable data are indispensable for marketing and promotions.

Lanquar (2011) wrote in UNWTO (2011) that religious tourism is an extremely complex field of observation for which no comparable statistics at the international level could be made available, despite the suggestion of some figures by large religious organizations. According to Lanquar (2011), data is neither readily available nor reliable at the national level to satisfy the expectations of data users and local data stored and disseminated by unofficial sources are mostly decentralized and found in a non-standard nature. It is therefore proposed to use information and communication technologies for producing statistics of "flows" (measuring the circulation of the people by ticketing, optical counting mechanisms or surveys) and "surges" (measuring the pressure of visitors on a given territory) based on the electronic traces left by the pilgrims and the tourists.

This is for sure a good proposal for the production of religious tourism statistics, yet caution has to be exercised by official statisticians for not producing overestimated data; such as, estimating visitor flows and surges based on cell phone connections to cell towers may yield higher values than expected due to cell phones with multiple-SIM cards. As Koomey (2008) writes '*When little information is available about a particular topic, any moderately credible source gets cited by everyone concerned with the topic and becomes the new conventional wisdom. This happens frequently even though such estimates are often based on extremely crude assumptions*'. This is a pertinent warning both for data producers and users and data produced based on a not comprehensively documented methodology should not be taken for granted and necessary quality checks should be conducted.

3.1.3 Proposed Actions and Policies for Development of Islamic Tourism in the Domain of Data and Monitoring

The ***OIC 2025 Plan of Action*** puts forward that the OIC Member States as a group have a high potential for the development of a sustainable international tourism sector and calls member states to '*promote awareness about Islamic tourism services in the Member States and beyond*' (OIC, 2016).

Besides, the UN member countries adopted the 2030 Sustainable Development Agenda that comprises 17 Sustainable Development Goals (SDGs) and 169 targets during the 70th Session of the UN General Assembly in September 2015. Tourism is featured in SDG 8, 12 and 14 which are (UNWTO, 2015):

- **SDG#8: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all**.
  - Target 8.9: "By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products".
- **SDG#12: Ensure sustainable consumption and production patterns**.
  - Target 12.b: "Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products".
- **SDG#14: Conserve and sustainably use the oceans, seas and marine resources for sustainable development**.
  - Target 14.7: "By 2030 increase the economic benefits of SIDS and LCDs from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism".

The United Nations Statistical Commission formed the High-Level Group for Partnership, Coordination and Capacity-Building for Statistics in 2015 for the 2030 Agenda for Sustainable Development (HLG), composed of Member States and including regional and international agencies as observers. The HLG aims to establish a global partnership for sustainable development data. The ***Global Action Plan for Sustainable Development Data***, prepared by the HLG, provides a framework for discussion, planning, and implementation of statistical capacity building necessary to achieve the scope and intent of the 2030 Agenda. The plan acknowledges that this work will be country-led, and occurs at sub-national, national, and regional levels.

Against this background, the actions and activities in the domain of data and monitoring for Islamic tourism proposed in this section will be in close observance of the OIC 2025 Plan of Action and Global Action Plan for Sustainable Development Data.

3.1.3.1 National Level

Develop national Islamic tourism indicators for the collection, collation, processing, and dissemination of Islamic tourism data:

- Establish specific units or designate staff under the relevant stakeholders of the national statistical system with a mandate to develop national Islamic tourism indicators.

- Conduct the development of national Islamic tourism indicators based on the proposed Purpose, Production, Permanence indicator development framework:

  Purpose

  - Consult stakeholders as early in the development process of national Islamic tourism indicators as possible in order to determine the purpose of the indicators and their audience.

o Identify already set national objectives and targets with direct and indirect impacts on Islamic tourism in the country.

o Determine key questions and indicator use to enable the fine-tuning of the national Islamic tourism indicators.

o Develop a conceptual model to determine and explain the relationship between the proposed national Islamic tourism indicators and their purpose.

Production

o Identify possible national Islamic tourism indicators that respond to specific key questions and user needs.

o Gather and review national Islamic tourism data based on the particular requirements of the Islamic tourism indicators

o Calculate national Islamic tourism indicators through the use and presentation of Islamic tourism data.

o Communicate and interpret national Islamic tourism indicators to help users understand issues in Islamic tourism in the country.

Permanence

o Check whether national Islamic tourism indicators are understood by data users and refine them in a balanced approach based on feedback received.

o Develop national monitoring and reporting systems to provide consistent Islamic tourism data over time and enable periodic production of the national Islamic tourism indicators.

Strengthen national statistical systems and the coordination role of national statistical offices in the production and dissemination of Islamic tourism indicators:

▪ Conduct a needs assessment of statistical capacities for the production and dissemination of Islamic tourism data at the national level and an assessment of available resources to address those needs, including those related to technical cooperation, training, and sharing of best practices that may be offered by OIC member countries.

▪ Integrate production and dissemination of Islamic tourism indicators into 1) the established work programmes of national statistical systems; 2) existing national strategies for the development of statistics (NSDS); and 3) national and sector development plans and priorities.

▪ Adopt and implement the Tourism Satellite Accounts approach by creating a well-established coordination mechanism among the relevant stakeholders of the national statistics system.

3.1.3.2 OIC Cooperation Level

Ensure that resources are available to implement the necessary programmes and actions for the development, production, and dissemination of Islamic tourism indicators

▪ Facilitate the relevant platforms to reach a universally agreeable definition of Islamic Tourism which will guide creation of the relevant Islamic Tourism indicators.

▪ Identify needs and capacities of OIC member countries concerning the production and dissemination of Islamic tourism indicators.

▪ Conduct statistical capacity building activities on the basis of indicated needs and capacities on Islamic tourism indicators.

▪ Communicate activities at the policy-making level to raise awareness about the Islamic tourism indicators.

- Encourage sharing of recommended practices on the development, production, and dissemination of Islamic tourism indicators between OIC member countries.

- Ensure the proper dissemination of Islamic tourism indicators through an online database.

3.2 Policy and Regulation Development

3.2.1 Key Concepts in Policy and Regulation Development

Globally, travel and tourism sector is mainly driven by the private sector which develops and delivers the products and services for tourists. The governments, however, also play a critical role in development and promotion of travel and tourism sector by setting national tourism policy; determining and allocating the tourism budget; establishing an appropriate legislative framework; overseeing the administrative structures for policy delivery; assessing and influencing wider government policies impacting on tourism; and putting in place appropriate research, statistics and evaluation programmes (WTTC, 2015).

Tourism policy and regulations are critical for the development and management of tourism in a country. Usually, governments take the lead in developing and implementing tourism policies and regulations while working in close cooperation with the internal tourism stakeholders. However, there is no set formula for developing tourism policy in a country as policy development processes differ across the countries based on their local political realities and circumstances.

According to the guidelines of the UNWTO (2017), the tourism policy making process must be consultative and can include following six phases: (I) preparation of a situation paper which encompasses a detailed review and assessment of the current tourism scenario in the country, identifies policy constraints and challenges, and, identifies opportunities and benchmarks for the future growth of the industry; (II) organization of a series of regional workshops to disseminate the situation paper to regional public and private tourism stakeholders to ensure that current and future needs of the tourism industry have been well identified;(III) formulation of a draft tourism policy; (IV) organization of a national forum to receive feedback from stakeholders on the draft tourism policy; (V) finalization of the tourism policy based on consultative feedback; and (VI) formulation of an action plan to implement the policy recommendations. Given the fact that Islamic tourism is a sub-sector of overall tourism activity, a similar approach can be adopted while preparing the national policies and regulations in the domain of Islamic tourism in OIC member countries.

With an increasing awareness, many governments across the world started to promote themselves as Muslim friendly tourism destinations by formulating appropriate policies and regulatory frameworks. On the other hand, many tourism industry players have started to offer special products and services, developed and designed in accordance with the Islamic principles, to cater to the needs and demands of these tourists.

Islamic tourism landscape varies greatly across OIC member countries. According to the latest estimates of the Halal Travel Indicator (HTI), only a few OIC member countries are more advanced in terms of overall policy and regulation framework that obtain high scores while the majority of them are performing poorly (Thomson & Reuters, 2016).[1]

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[1] The HTI indicator equally weights four categories which include the supply drivers relative to country size (Financial), the degree of Halal-friendliness of the country's ecosystem (Governance), the level of awareness of a country's Islamic tourism sector based on the news articles and events, and the travel sector's contribution to employment in the country (Social).

Over the years, governments in some OIC member countries have made considerable progress in the development and promotion of Islamic tourism activities by developing national policies and strategies. A recent report of COMCEC (2016a) provides a detailed analysis of public policy gaps and opportunities for the development of Islamic tourism in OIC member countries. The report has classified Islamic tourism markets into three broad categories based on the level of maturity of Halal ecosystem (i.e. availability of Halal food and Islamic heritage sites etc.) and awareness. The report defined mature markets as OIC member countries with well-developed Halal ecosystems and awareness, such as Malaysia and Indonesia. Progressing markets are those OIC member countries with well-developed ecosystems, for example there is an availability of Halal food and Islamic heritage sites, but low awareness and absence of promotion of those products and services to Muslim tourists like in Mozambique and Uzbekistan. Finally, according to the same report, new markets are characterized by weak Halal ecosystems and low awareness on Islamic tourism, such as Nigeria and Guyana.

3.2.2 State of Policy and Regulation Development in Selected OIC Member Countries

Being the top Islamic tourism destination, Malaysia is also leading the development and implementation of pro-Islamic tourism policies and regulations. So far, the Malaysian government has taken 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" outlining 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 MFT 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. Among others, it also focuses on SMEs within the Halal industry in Malaysia specifically looking at formulating broad SME policies across Malaysia, disseminating information on government incentives towards SMEs in the Halal industry, as well as providing business support and increasing the competitiveness of SMEs within the Halal industry in Malaysia (COMCEC, 2016a; 2016b).

Similar policy actions and regulatory frameworks can also be identified in other top destinations like Indonesia and UAE where governments have established dedicated committees to develop Islamic tourism development strategies; work in close cooperation with the tourism service providers to raise awareness about the potential of Islamic tourism market, specific needs and demands of the Muslim travelers; support the providers in developing and certification of Islamic tourism products and services; and engaging in destination marketing.

As a result of governmental efforts, major tourism players in these countries have started to develop and offer products and services to Muslim travelers including Halal certified food, prayer areas and separate entertainment facilities for men and women. Many hotels have equipped their rooms with 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).

3.2.3 Major Issues and Challenges

Diverse understanding on the concept of Islamic tourism: Globally Islamic tourism market is still fragmented by the diversity of the meaning of Halal. Apart from religious understandings, income levels, awareness level on Halal issues, location, and culture have some influence on the understanding of Muslim travelers about Islamic tourism. These factors altogether shape their expectations on Islamic tourism products and services. In this regard, national policy-makers need to take all these aspects into

account in order to come up with a more comprehensive and standard set of policies and regulations that could trigger the growth of the Islamic tourism industry.

Lack of international standards: As there are no unified international halal standards and certification arrangement for the Islamic tourism industry, each OIC member country follows its own approach to regulate the industry. Since tourism in its nature an international activity, cross-country differences in terms of policies and regulations usually results in dissatisfaction among Muslim travelers at varying degrees.

Lack of specialized national entities: In general, governments in the majority of OIC member countries have not paid due attention towards this niche market yet. Therefore, many OIC member countries still have not established specialized national entities/bodies to develop policies and regulate the industry yet. Only a few OIC member countries such as Malaysia, Indonesia and UAE have a national tourism entity/body that focuses on policy and regulation development aspects with a view to emerge as an attractive destination particularly for tourists that are interested in Islamic tourism products and services. In this context, it is necessary to exert efforts both at the national and OIC cooperation levels to device proper policies, strategies and regulatory frameworks for the development of Islamic tourism.

3.2.4 Proposed Actions and Policies for Development of Islamic Tourism in the Domain of Policy and Regulation Development

In the light of experiences of top Islamic tourism destinations in OIC member countries and the findings of three COMCEC (2016a, 2016b, 2017) reports following actions and policies are being proposed for the improvement of policy and regulation aspects in the Islamic tourism industry in OIC member countries.

3.2.4.1 National Level

Ensuring political will and commitment: Given the fact that development of tourism policy and regulations is the sole responsibility of the government across the world, governments in OIC member countries should pay attention towards the development of Islamic tourism market by dedicating adequate human and financial resources. Furthermore, governments must also take appropriate administrative measures to support the nascent Islamic tourism industry to flourish in the presence of conventional tourism players.

Creating awareness: Islamic tourism is a niche market across OIC member countries which require efforts at the government level to build a strong business case for it internally within the tourism stakeholders to create a focus on this market and invest resources and effort.

Establishing national Islamic tourism committee: Experiences of leading Islamic tourism markets reveal that a dedicated national body needs to be established to ensure a sustained and coordinated realization of becoming an attractive Islamic tourism market and to realize real tourism growth through it. For countries in early phase of evaluating this opportunity, a 1-2 year working committee can be established to build momentum before committing to a dedicated government Islamic tourism body.

Develop and drive Islamic tourism market growth strategy: The dedicated government initiated body or committee should develop and drive national Islamic tourism development strategy and initiatives. Key elements of the strategy should include:

    a. In coordination with national tourism body, set Islamic tourism growth targets as part of national tourism growth targets.
    b. Identify and prioritize domestic destinations for Islamic tourism market.
    c. Identify and prioritize source Islamic tourism market and prepare an Islamic tourism market profile based on this prioritization.

      d. Plan and facilitate Islamic tourism products and services development for the industry.

      e. Plan and facilitate Islamic tourism marketing strategy development for the industry.

      f. Engage with key tourism sub-sectors on effective products/services and marketing strategies.

Establish halal regulations: OIC member countries should closely regulate the Halal industry and monitor compliance of suppliers as well as encourage certification. Halal rating and certification services for hotels and restaurants were the top need selected by the survey respondents (COMCEC, 2016a). Given the importance of Halal food services for Muslim tourists, OIC member countries should ensure a clear Halal food compliance communication. To this goal, the Ministry or designated body should coordinate with the national food certification and accreditation bodies to oversee the state of Halal food compliance across its food services value-chain and drive recommendations. In addition, given that Halal rating and certification services for hotels and restaurants are critically important, government entities should look to adopt Halal travel standards and rating schemes being developed out of governmental entities such as Malaysia, SMIIC, and private entities such as CrescentRating and TripFez' Salam Standard to adopt.

Easing visa policy: Visa facilitation is the most critical for the development of international tourism. There is ample global evidence that improvement in visa policies and process has led to increase in tourism in many countries/regions (UNWTO and WTC, 2014). Over the years, there has been successful collaboration among OIC member countries to facilitate the visa process e.g. Visa-waiver among the GCC countries. However, despite all progress only a handful of OIC members have mutual visa-free travel arrangements for their citizens whereas; a significant number of tourists still have to go through a long process of obtaining the traditional visa. Therefore, to encourage increased visitors from neighboring OIC member countries, nations would do well to ease their visa restrictions to those countries by enhancing the current process and introducing the new mechanisms like eVisa etc.

Developing specific rules and regulations for designated destinations to emerge as Islamic tourism destination: At the early stage, public authorities may select only some regions/provinces for the development of Islamic tourism. This strategy of gradual implementation of Islamic tourism practices enables the government authorities to focus their efforts in terms of product development and marketing on those destinations before expanding to other destinations in the country. Moreover, such a strategy would also help governments to track and monitor malfunctioning policies and regulations that impede the growth of the Islamic tourism industry. For example, Indonesia designated three provinces in the country based on certain set of criteria for the development of the industry and started to see some early positive results of such a strategy.

Tourism infrastructure development fund: Islamic tourism industry has been suffering from shortage of financial resources for investment. This state of affairs emanates first from the reluctance of investors in the emerging industry as they fear there will be a loss of revenue especially in food and beverages and secondly due to the under supply of sharia-compliant financing for the non-real estate ventures (Thomson & Reuters, 2016). In addition, limited resources also constitute a challenge for Halal certification and standardization authorities as well as specialized public entities for the development of Islamic tourism. In order to overcome this impediment, policy-makers need to develop and dedicate funds for Islamic tourism infrastructure development.

Support SMEs: Given the fact that majority of tourism services providers are small and medium enterprises, governments in OIC member countries must support the SMEs by facilitating their access to financial resources, training opportunities and subsidies.

Facilitate Halal certification: Governments should facilitate for small and medium enterprises to obtain Halal certification by both providing training and subsidizing certification or even by providing certification free of charge as in the case of Indonesia providing free Halal certifications for 750 small and medium enterprises (COMCEC, 2016a).

Training tourism suppliers: Tourism ministries in OIC member countries are well advised to establish on-going training programs to train the industry on tailoring their products and services to the MFT market as well as on effectively marketing their products and services. The training programs should be designed to address the gaps.

Establish a mentorship program: Another way to develop the skills and expertise of tourism suppliers is by pairing each of them with a mentor. The mentor can be either from the same country or another OIC country with which there is bilateral cooperation.

3.2.4.2 OIC Cooperation Level

Develop and promote unified OIC Halal standards: In the majority of the OIC member countries, there is no official body available at the national level to certify hotels and destinations according to the Islamic requirements. Also lack of global standards in the industry confuses travelers in their experiences across countries. This state of affairs necessitates development and promotion global halal standards for the tourism industry that define products and services, and govern certification and accreditation process across the value chain. In particular, OIC could play a leading role to develop and promote these standards in collaboration with member countries.

Promote Visa facilitation/waiver programmes and policies: In order to grow the national and regional tourism and improve social integration, OIC member countries need to work out a plan for a Common Visa Scheme entailing a roadmap for improving the current visa processes, introducing eVisa programmes and establishing regional visa facilitation/waiver agreements. Such a scheme will not only boost the growth in the Islamic tourism industry but also trigger intra-OIC tourism investments, transfer of knowledge and exchange of expertise.

Strengthen Islamic finance and enhance intra-OIC Investments: Islamic tourism industry is at a nascent stage facing many obstacles including the availability of adequate financial resources. Given the fact that the Islamic tourism industry usually experiences some problems with access to conventional sources of funds, OIC member countries must encourage the players in the Islamic finance industry to work out a plan for the development of Islamic tourism industry. Furthermore, OIC should also develop a capacity to facilitate intra-OIC investment targeting especially the Islamic tourism sector for instance through developing an online investment portal.

3.3 Marketing and Promotion

3.3.1 Key Concepts and Importance of Marketing and Promotion

Marketing and promotion policies constitute an essential part of any national tourism strategy. As a niche market of the tourism sector, products and services of the Islamic tourism sector also needs to be marketed and promoted under the guidance of national authorities in OIC member countries in order to raise awareness, attract more tourists, generate more revenues and sustain the growth of the sector.

In the simplest term, the tourism marketing strategy can be defined as a country's strategy that combines all of its tourism marketing goals into one comprehensive plan. A good marketing strategy needs to be drawn from market research and focus on the right product mix in order to achieve the maximum profit potential and sustain the growth of the sector. As in the conventional tourism, development of an effective marketing strategy in the Islamic tourism sector is a challenging task given the increasing competition among countries. Interestingly this competition not only originates from OIC member countries. Many countries with non-majority Muslim population such as Thailand, UK and Singapore went into the market and started to serve extensive Islamic tourism products and services.

Apart from the growing competition, a major challenge in the domain of Islamic tourism is the Halal standardization and certification issue. Unlike in the conventional tourism, target traveler group in the Islamic tourism sector pays a special attention to the Halal issue and demands such standard services. Despite these existing challenges, according to a survey conducted in 2016, 74 per cent travelers in the Islamic tourism market indicated that they are willing to pay extra to receive products and services tailored to meet their religious needs (COMCEC, 2016b, p.59).

An effective marketing strategy in the tourism sector usually encompasses the following items: product development, branding, pricing, positioning, and promotion as described in Box 3.3.1. Finding the right mix of these items is not an easy task for defining an effective Islamic tourism marketing strategy. The mix might be affected from the existing Islamic tourism ecosystem in the country, target groups and segments, overall infrastructure quality, global and economic outlook, and strategies of other countries. It is also critical to know the profile of a Muslim traveler in order to calibrate a balanced marketing and promotion strategy for Islamic tourism products and services, which usually can be retrieved through a market research (Box 3.3.2).

Box 3.3.1: Key Concepts in Islamic Tourism Marketing

Product Development: The creation of Islamic tourism products and services with new or different characteristics that offer new or additional benefits to the traveler.

Branding: The process involved in creating a unique name and image for Islamic tourism products, services or places (e.g. Muslim friendly city or separated beach for men/women) in the travelers' mind, mainly through advertising campaigns with a consistent theme. Branding aims to establish a significant and differentiated presence in the market that attracts and retains loyal customers.

Pricing: Activities aimed at finding a product's (from minimum rate for a hotel room rate to airport tax) optimum price, typically including overall marketing objectives, consumer demand, product attributes, competitors' pricing, and market and economic trends.

Positioning: Islamic tourism marketing strategy that aims to make a brand (e.g. country, region, city) occupy a distinct position, relative to competing brands, in the mind of the traveler.

Promotion: The advancement of Islamic tourism products, services or places through publicity and/or advertising.

Source: Adapted from businessdictionary.com

Against this background, OIC member countries need to invest both time and resources to develop a comprehensive Islamic tourism marketing strategy. Creating an action plan that clearly articulates goals, responsibilities, and metrics for success ensures that the country is being realistic in the context of the available resources. In order to promote and market developed products and services in Islamic tourism various online and offline marketing and promotion means can be used.

COMCEC (2015) grouped marketing and promotion means used in the literature under two main categories as indicated in Table 3.3.1. Outbound marketing is the traditional form of tourism marketing where a country initiates the conversation and sends its message out to the all potential tourists. Inbound marketing is the opposite of outbound marketing where audience/customer finds the tourism destination, product or service. Thanks to developments in technology and marketing techniques, it has become easier to optimize search tools to find out and reach the consumer who has an interest in a tourism destination, product or service. However, many countries across the globe including OIC member countries use a mix of outbound and inbound tourism marketing means. Determining the right-mix of outbound and inbound marketing means at the national level depends on the following factors:

Box 3.3.2: Profile of a Muslim Traveler

It is impossible to develop an effective tourism marketing and promotion strategy without understanding the profile of an average Muslim traveler. In this context, a COMCEC (2016b) study conducted a survey with 1120 respondents representing Africa, Asia, Europe and North America regions. Key findings of the survey that are the most relevant for marketing and promotion strategies can be summarized as follows:

- **Duration:** When asked about the average number of days spent on a trip, the general average for all respondents was 15 days. However, there are differences across regions in terms of duration.
- **Booking Method:** With respect to the booking method used for those who didn't stay with family and friends, 55% mentioned using travel websites, 23% cited going through travel agencies, and 15% mentioned contacting hotels directly. The rest of the respondents (7%) cited numerous other tools including walk-in reservations or someone else doing reservations for them.
- **Pre-Travel Research:** Respondents were also asked whether they research destinations before traveling to ensure they meet their religious needs, 84% affirmed that they do. They mentioned getting the information through travel websites (72%), from family and friends (63%), social media (47%), blogs (41%), travel agencies (22%), and advertising (12%).
- **Influencer Factor:** When asked about what influenced them to choose to travel to the last destination they visited, 67% mentioned being influenced by recommendations from family and friends, 28% cited online reviews followed by online promotions (21%), and social media (18%).

Source: Adapted from COMCEC (2016b)

Available marketing and promotion budget;

    a) Available human resources in the responsible Ministry/Committee/Department;
    b) Quality of infrastructure (e.g. broadband internet) and Halal standards;
    c) Target Groups/Regions; and
    d) Vision and goals defined in the marketing and promotion strategy.

Table 3.3.1: Selected Outbound and Inbound Marketing Means

Outbound Marketing Means	Inbound Marketing Means
Paid/rented e-mail lists	Opt-in e-mail lists
TV, Radio and print advertising	Search engine optimization
Billboards and outdoor advertising	Downloadable E-books and brochures
Generic press releases	Sponsored events
Pop up and pop-under digital ads	Customized press releases
Contextual ads	Community building
Outbound sales calls	Influencer outreach
Interstitial webpages	Blogging
Trade show and fair booths	Earned social media
Untargeted social media advertising	Word of mouth and viral marketing
Banner and display ads	Content creation
Paid App reviews	Organic App store visibility
Online video ads	Original video content

Source: Adapted from COMCEC (2015)

According to COMCEC (2016a), when the price factor is excluded, a Muslim traveler who is willing to have Islamic tourism experience takes the following six aspects into consideration the most: halal food, prayer room services (e.g. in the hotel, airport, attraction places), water friendly toilets (e.g. sprayers), Ramadhan services, facilities with no non-halal activities, recreational facilities with privacy (e.g. separated beaches). These aspects shed some lights for policy-making on factors to invest in and effectively use in the marketing channels the most. Broadly speaking, a marketing and promotion strategy in Islamic tourism needs to provide necessary information to a potential visitor on the state of services in five major sub-sectors namely food and beverage, accommodation, transport services, travel services, and tourism activities.

However, it is uncertain for policy-makers which factor is the most important for which Muslim traveler. It is therefore *segmentation* is a key success factor in the development of a marketing and promotion strategy. In the segmentation of travelers, the most important factors can be listed as geographical background[2], sensitivity on Halal issues[3], income level, age-group (e.g. young, adult or old), travel type (e.g. leisure, business, honeymoon), and marriage status of travelers.

As different groups of Muslim travelers have their own preferences and expectations on Islamic tourism products and services, marketing and promotion strategies in OIC member countries need to be developed by taking such differences into account. In addition, segmentation is critical to determine the right-mix of inbound and outbound marketing means while marketing and promoting Islamic tourism products and services in different parts of the world. Neglecting the segmentation phase may result in a failure in marketing and promoting strategies.

3.3.2 Islamic Tourism Marketing and Promotion Practices in Selected OIC Member Countries

The high cost of destination marketing campaigns enforces National Tourism Organizations (NTOs) to be more selective in the geographic markets and segments within those markets that they direct marketing activities towards. In particular, as a niche tourism market, Islamic tourism has been increasingly becoming important in the development agenda of OIC member countries, which requires implementation of effective marketing and promotion policies. Despite its increasing importance and growth prospects, only few OIC member countries have developed and started to implement Islamic tourism marketing and promotion strategies to nourish the growth of the sector and generate more revenues. In this regard, this sub-section provides some marketing and promotion practices from selected OIC member countries. Some of these marketing and promotion practices can be implemented by other OIC member countries or may facilitate their process of policy-making. Moreover these examples may allow detecting and identifying some commonalities in the marketing and promotion practices followed by OIC member countries.

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[2] Geographical region that a traveler comes from matter for host countries while developing their Islamic tourism marketing and promotion strategies that there are significant differences across different regions in terms of their preferences, duration of stay and expectations. For instance, GCC travelers constituted 3% of the global Muslim population but represented 36% of the travel spend in 2015 (COMCEC, 2016b). While the price factor is relatively less important for these travelers, quality of average services and availability of premium services matter a lot.

[3] The expectation of a Muslim traveler from the Halal concept may vary especially when it comes to the services sector. According to COMCEC (2016a), it is possible to group Muslim travelers as practicing, non-practicing and strictly practicing. Each group has its own priorities and expectations from Islamic tourism products and services.

Malaysia

Malaysia is one of the main destinations for Muslim visitors from around the world. It has been recognized as the No. 1 ranked destination in 2015 version of the Global Muslim Travel Index (Master Card and Crescent Rating, 2015). Malaysia has been named the number one destination for Muslim travelers for four consecutive years from 2011-2014 by Crescent Rating of Singapore based on availability of Halal food, access to prayer facilities, Muslim friendly services in the hotels, and the country's stability and security (Islamic Tourism Centre, 2015).

Muslim visitor arrivals constitute around 22 percent of the total arrivals. The key and unique strength of Malaysian success story on Islamic tourism is the commitment of the Tourism Ministry which identified the Muslim travelers market as a priority market in 2009. This also led to the creation of the Islamic Tourism Centre (ITC) that later on published a blueprint document for the development of the market.

According to Samori and Rahman (2013), Malaysia is a pioneer in introducing a comprehensive standard for halal products through Malaysian Standard: Halal Food-Production, Preparation and Storage-General Guidelines that enabled the Islamic tourism sector in Malaysia to market and position itself as a unique destination among other countries due to existence of Halal standards, controlled and monitored by the government authorities.

The development of the Halal Master Plan was another milestone in the Malaysian case. The Master Plan addressed issues of certification, sectoral development, halal integrity, implementation, timeframes and responsibilities, projecting the country's international image as an authority in halal products matters (Saifol, 2011).[4] Malaysia started to offer Islamic tourism products and services in sub-niche markets such as ecotourism and health (Ariffin and Hasim, 2009). The existence of variety of Islamic tourism products and services paved the way to position Malaysia as a hub for Islamic tourism and enabled to reach a wide spectrum of potential tourists. Malaysia not only developed Islamic tourism products and services but also hosted international events such as the first OIC Global Islamic Tourism Conference and Exhibition, and the World Islamic Conference in Kuala Lumpur in 2008. These two events helped Malaysia in building up an image as an Islamic destination and also raised awareness both locally and globally about the sector. In terms of online tools, Malaysia developed apps and tools to target potential visitors. In this context, Tourism Malaysia launched online tour packages and the "Tourism Malaysia App". Malaysia Tourism Promotion Board has also been organizing regular familiarization trips for journalists and travel agents especially from the Middle East as a part of targeted-marketing strategy (Ariffin and Hasim, 2009).

The key lesson learnt in Malaysia's success story is that a government led commitment is required to activate the whole industry to make Islamic tourism a priority market for the destination (COMCEC, 2016a). On the other hand, Malaysia has achieved to portray itself as an Islamic destination both through large-scale campaigns and through small businesses such as hotels and travel agents that its marketing strategy integrates different stakeholders in a successful way (Shafaei and Mohamed, 2015).

Indonesia

As the world's most populous Muslim country, tourism is an important component of the Indonesian economy. In particular, Islamic tourism has a huge potential to grow in the country given its natural and cultural richness.

The Ministry of Tourism and Creative Economy of Indonesia has been engaging the Islamic tourism to develop the market in Indonesia. In particular, to strengthen the position of Indonesia a Muslim friendly

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[4] The Plan included three phases: phase 1: 2008-2010 for developing Malaysia as a global center for halal integrity and preparing the industry growth; phase 2: 2011-2015 for establishing Malaysia as one of the preferred locations for halal-related business; and phase 3: 2016-2020 for broadening geographic footprint of home-grown halal-related companies.

destination in November 2015, it launched the 'Muslim Visitor' guide to Indonesia. Indonesia replaced the term "Shariah tourism" with the term "Halal tourism" in its products and services. Moreover, the Ministry appointed a special committee, reporting directly to the Ministry, to develop and promote Halal tourism in Indonesia. The committee is called "Team for Accelerated Development of Halal Tourism". The appointment of the committee reflects the high-level commitment for the development of the sector.

The Ministry also started promotional programs with social media influencers to showcase Indonesia as a Muslim friendly destination. Furthermore, Indonesia started to use social media effectively. As part of Islamic tourism marketing campaigns, some familiarization trips for tourism operators were organized and accordingly they paid several visits to Indonesia.

Apart from campaigning to promote "Indonesia" as a whole, Indonesia developed strategies to position different regions of Indonesia as competitive Islamic tourism destinations. In this regard, the Ministry of Tourism and Creative Economy of Indonesia designated three provinces in Indonesia as Islamic tourist destinations: Lombok, West Sumatra and Ache. The selection of these three destinations was based on certain criteria involving 80 metrics/parameters. Among these regions, Lombok already won two awards in World Halal Travel Awards in 2015 as "World's Best Halal Destination" and "World's Best Halal Honeymoon Destination". These successes reflect that Indonesia implemented a successful strategy to select the right place and to market it to the right audience.

While launching the Islamic tourism campaigns, a major concern was in Indonesia is the question of whether conventional tourism and Islamic tourism can co-exist successfully. In fact, government's right strategies and initiatives to select the most convenient places to market as Islamic tourism destinations enabled public authorities to get the support of other stakeholders in the market (travel agencies, hotels etc.) (COMCEC, 2016a). The synergy between public and private sector also strengthened the marketing and promotion power and capacity of Indonesia in the global Islamic tourism market.

Indonesia has been involving into international events and forums in the domain of Islamic tourism in order promote its position and raise awareness on the Indonesian Islamic tourism products and services. In this context, Indonesia hosted the OIC's First International Forum on Islamic Tourism in Jakarta in 2014. In the late 2015, Indonesia assumed the chairmanship of a specialized working group that aims to prepare a roadmap for the development of Islamic tourism in OIC member countries. In August 2016, Indonesia hosted the 12th World Islamic Economic Forum (WIEF) in Jakarta. During the 43rd ASEAN NTO Meeting in January 2016, a series of technical meetings involving travel trade professionals were organized with a view to share expertise in developing Islamic tourism products. Such initiatives reflect that there is a strong commitment from the government side on the development of Islamic tourism (Asih and Asih, 2015).

United Arab Emirates (UAE)

UAE is one of the fastest growing destinations for Muslim visitors. The vision documents (e.g. vision 2020) set by authorities especially by Dubai and Abu Dhabi Governments have made UAE an attractive destination for Muslim tourists. In the UAE, Dubai is particularly positioning itself as the "Islamic economic capital of the world" and "family travel", which includes Islamic tourism as one of the key verticals within the initiative. Abu Dhabi is also positioning to be the "halal travel" destination of choice. Dubai was ranked as the no. 1 shopping destination for Muslims in the Muslim Travel Shopping Index 2015.

UAE has several strengths in the Islamic tourism market and wisely uses them in marketing and promotion. All restaurants must be halal certified in the country. There are numerous dry hotels offering premium and standard services to Muslim travelers. The existing national strategy on "Islamic economic capital of the world" not only helps the Islamic tourism market to grow but also facilitates its position to brand as a hub of Islamic tourism products and services. Ground breaking mega projects

(e.g. Masdar city) and landmarks (e.g. towers, skyscrapers, malls, opera houses) put the UAE regularly into the news items both in the traditional media as well as in social media which help to raise awareness on the country across the globe including OIC member countries.

Organization of international events especially on Halal economy and tourism also is an integral part of Islamic tourism marketing strategy in UAE. For instance, Dubai hosts World Halal Expo and Abu Dhabi organizes the World Halal Tourism Summit. These kind of international events not only contribute to the national economy of the UAE but also provide unique opportunity for branding and positioning.

Qatar

Qatar has a great potential to grow in the Islamic tourism market. About two thirds of tourists arrived from GCC countries to Qatar in the period 2010-2015 reflecting the strong presence of Islamic tourism products and services (Qatar Tourism Authority, 2014). The aim of the Qatar Tourism Authority is to develop the destination with a balance of preserving/showcasing heritage as well as building modern attractions/experiences. Islamic tourism listed among the five key areas prioritized for the development of tourism in Qatar. In particular, the Tourism Authority targeted the meetings, incentives, conferences and exhibitions segment as a source of development.

The strong presence of halal ecosystem in the country such as availability of Halal food, prayer facilities in malls, more than a thousand available mosques within the country, Muslim friendly hotels (designated prayer rooms, Qibla signs marked in rooms, toilets with sprayers etc.) enabled Qatar to emerge as a growing tourism destination in the Islamic tourism market. When the existing halal ecosystem is considered along with the available of strong infrastructure (roads, hub-international airport, premium hotels etc.), Qatar is set to grow in the Islamic tourism market.

Tunisia

Tunisia's tourism products are mainly based on its beaches and beach resorts. It has a good reputation in the world tourism market especially in the Europe with its friendly and hospitable people. Although Tunisia has positioned itself as a sun and sea destination, it has a lot more to offer in terms of culture, ecotourism, health & wellness, and even golf tourism, all of which have to the potential especially target Muslim visitors. Vast majority of population of Tunisia is Muslim (99.8 per cent). In this context, there is already an existing understanding on Halal concept and awareness on Halal products and services. Therefore, Islamic tourism constitutes a great potential for growth in Tunisia (Carboni et al., 2014). In particular, the Ministry of Tourism foresees the Islamic tourism a viable option to restore the growth in the overall tourism sector (COMCEC, 2016a). In this context, the Ministry of Tourism started to promote Tunisia as a destination particularly in the GCC region with providing unique Muslim-friendly touristic activities. In this context, the marketing strategy of Tunisia constitutes a good example of segmentation and promotion in targeted markets.

As explained above in details, there are different practices and approaches followed by OIC member countries in order to market and promote Islamic products and services available in their countries. Key success factors in Islamic Tourism marketing and promotion practices in selected OIC member countries can be summarized as in Table 3.3.2. Key success factors in different OIC member countries reveal that many OIC member countries have already basic infrastructure and understanding (e.g. Halal restaurants, Halal ecosystems, available mosques etc.) required for the development of Islamic tourism. However, such already existing factors are usually necessary but not sufficient to attract more Muslim travelers. Therefore, many OIC member countries are in need of taking policy actions, which will be discussed in the next sub-sections.

Table 3.3.2: Key Success Factors in Islamic Tourism Marketing and Promotion Strategies in Selected OIC member countries

Malaysia	1. Government Commitment 2. Establishment of Islamic Tourism Centre 3. Standardization and Certification 4. National Blueprint Document 5. Traditional and Social Media Advertisements 6. Existing Halal Ecosystem
Indonesia	1. Government Commitment 2. Stakeholder Engagement 3. Establishment of a Specialized Team 4. Product Development and Segmentation (e.g. Lombok, Ace, West Sumatra regions)
United Arab Emirates	1. Government Commitment 2. Islamic Economy Capital Project 3. Vision 2020 and 2030 4. Family Friendly Tourism Theme 5. Existing Halal Ecosystem 6. Global Events on Halal Economy and Tourism
Qatar	1. Government Commitment 2. Segmentation (meetings, conferences, exhibitions) 3. Existing Infrastructure as Catalyst
Tunisia	1. Segmentation 2. Awareness on Halal Tourism 3. Existing Halal Ecosystem

Source: SESRIC Staff Analysis.

3.3.3 Major Issues and Challenges

According to UNWTO and ETC (2011), which defined principles and procedures of tourism product development at the national level, marketing and promotion is the final step of development of a grand tourism development strategy. A marketing and promotion strategy can be successfully designed and implemented only after completion of the following steps: carrying out market research to understand profiles (different segments), having stakeholder consultation to join forces with the business sector, development of product and investment plan, and investing into human resource development. If some of these steps are skipped, it is possible to waste public money with flawed tourism marketing and promotion strategies. In other words, a marketing and promotion strategy without taking all these aspects carefully into consideration is not likely to reach its objectives.

As the maturity and levels of development in the tourism sector of OIC member countries vary, the major issues and challenges that hinder development of Islamic tourism are also not expected to be the same in all OIC member countries. This also holds true for development of policy solutions that there is no one-size-fits-all marketing and promotion policy for all OIC member countries. As indicated in Box 3.3.3, OIC member countries can be grouped under four main categories as follows: Established destinations with major tourism sectors (11 countries); OIC member countries where tourism is in the growth stage of the tourism area life cycle (26 countries); countries in the early stages of tourism development (16 countries); and OIC member countries in the rebuilding phase after conflict (4 countries). Such a classification may help OIC member countries to better develop well-targeted Islamic tourism marketing and promotion policies by considering their stage of development in the tourism sector.

Box 3.3.3: OIC Member Countries According to Stage of Tourism Sector Development

Established destinations with major tourism sectors (11)

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

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

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

Countries in the early stages of tourism development (16)

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

Countries in the rebuilding phase after conflict (4)

Afghanistan; Iraq; Libya; Syria.

Source: Adapted from COMCEC (2013)

Despite existing differences among OIC member countries in terms of the stage of development in the Islamic tourism sector as seen in the conventional tourism sector, some common factors can be identified that constitute a barrier for the development and implementation of comprehensive Islamic tourism marketing and promotion strategies:

Halal standardization and certification: There are various practices in terms of Halal standardization and certification across different OIC member countries. In particular, when it comes to tourism related facilities (e.g. hotels, swimming pool, beaches, airport prayer rooms etc.) the existing differences are found to be sharper. Some OIC member countries such as Malaysia have a strong halal certification program, which helps visitors to identify the Halal outlets through the display of the Halal logo. However, this kind of widespread Halal certification is not common in most other OIC member countries.

Conventional tourism vs. Islamic tourism: Although Islamic tourism market has a great potential to grow in the OIC group, some member countries (e.g. Tunisia or some OIC member countries in Central Asia) share some common concerns that development of Islamic tourism may negatively influence the image of the country and perceptions of international tourists. In such OIC member countries stakeholders in the tourism sector are not too ambitious about marketing and promotion of Islamic products and services.

E-Marketing vs. traditional marketing channels: The rise of internet and technology allowed OIC member countries to develop and utilize alternative marketing tools in addition to already existing traditional marketing tools (Akyol and Kilinc, 2014). However, still important number of people across different regions of the OIC group can be influenced by traditional marketing tools such as billboards and TV advertisements. In this regard, a marketing and promotion strategy that has a significant imbalance between e-marketing and traditional marketing channels is likely to fail.

Key performance indicators and metrics: Many OIC member countries allocated significant amount of budgets on tourism marketing and promotion strategies. For instance, it is reported that Turkey spent US$ 128 million in 2013 on global tourism marketing campaigns (all activities). Malaysia spent over US$ 500 thousand solely on facebook campaigns in 2011 to market Malaysia as a tourism destination (COMCEC, 2013). Given the ever increasing marketing and promotion budgets, it is highly critical to develop key performance indicators and metrics in order monitor the effectiveness and

success of marketing and promotion strategies. The underdevelopment and/or lack of key performance indicators and metrics to measure the success of Islamic tourism marketing and promotion strategies in OIC member countries is a challenge that needs to be addressed.

Coordination Issues: Development of Islamic tourism requires close collaboration across various stakeholders such as Sharia Board/State Religious Authorities, Halal Certification units, Islamic Finance institutions, and travel agencies. In this context, lack of a leading coordination unit as well as prevailing different understandings among different stakeholders reduce the possibility of designing successful Islamic tourism marketing and promotion strategy. However, some OIC member countries have recently established dedicated units or centers for the development Islamic tourism sector including marketing and promotion strategies. Malaysia can be cited as a successful example in the OIC group in this respect that established the Islamic Tourism Centre in 2009, which has the sole responsibility for the development sector. Another example can be given from Indonesia. Although Islamic tourism is not a new phenomenon for Indonesia, only recently Indonesia formed a special team to eliminate the coordination issues as well as to identify policy actions to develop Islamic tourism market including marketing and promotion strategies.

Increasing Competition from non-OIC member countries: Singapore, Japan and South Korea are some examples of non-OIC member countries which are keenly targeting the Muslim tourists through providing Muslim friendly tourism services. In addition, UK, Australia and Thailand are also seeking to attract more Muslim traveler.[5] To this end, OIC member countries, as a group, need to be ready for increased competition in the market that entails preparation and implementation of more effective marketing and promotion strategies.

3.3.4 Proposed Actions and Policies for Development of Islamic Tourism in the Domain of Marketing and Promotion

Islamic tourism represents a niche market within the tourism sector with high growth prospects especially in OIC member countries (Henderson, 2009). Although Islamic tourism is still at its early stages in many OIC member countries, inherent strengths of OIC member countries such as Halal ecosystem and awareness provide an enabling environment for its development. However, OIC member countries need to address major challenges and develop comprehensive marketing and promotion strategies with a view to expedite the growth of market. In particular, the following actions and policies related with marketing and promotion of Islamic tourism products and services will help OIC member countries to get a higher share in the global tourism market as well as to improve intra-OIC tourism activities.

3.3.4.2 National Level

Establishing a dedicated national coordination unit/task force/centre: A coordination unit/task force/centre is needed to ensure overall coordination, design and implementation of marketing and promotion strategy. Only a few OIC member countries have dedicated coordination units for the development of Islamic tourism.

Developing unique Islamic tourism based destination positioning and marketing: Only limited efforts have been made by a few OIC member countries such as Malaysia, UAE and Indonesia to reach out to Muslim travelers with a clear Islamic tourism destination positioning and marketing. This is a broad area that requires development of a comprehensive plan to position and promote the OIC destinations. In order to develop such a comprehensive marketing plan a "market research" needs to be carried out to identify segments, target markets and find out bottlenecks. Moreover, a marketing strategy needs to entail key performance indicators and metrics with a view to track the progress and

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[5] In 2014, about 22.5 million tourists traveled from a OIC country to a non-OIC country.

effectiveness of developed strategies. While developing such strategies, OIC member countries need to take their overall stage of development in the tourism sector into account in order to set more realistic targets. Moreover, OIC member countries need to pay a particular attention to present and reflect their inherent strengths in such a strategy that they have rich Islamic history, Islamic heritage and Islamic elements of providing hospitality. All these elements have the potential to attract more Muslim visitors into OIC member countries to have unique Islamic tourism experience.

Integrating Islamic tourism into existing national tourism strategies: Some OIC member countries have not considered Islamic tourism as niche market yet. In such OIC member countries it has not been listed in the existing national tourism strategies. The lack of Islamic tourism component in the national tourism strategies of some OIC member countries limits marketing and promotion of Islamic tourism products and services such as due to lack of allocated budget item or human resources. To this end, it is of importance to recognize Islamic tourism as a niche market and integrate it into the national tourism strategies.

Increasing awareness on Islamic tourism products and services among stakeholders: There is limited awareness among travel industry stakeholders (e.g. hotels, travel agencies, tour operators etc.) about importance of Islamic tourism and its growth prospects in a significant number of OIC member countries. In this context, national tourism authorities of OIC member countries need to prepare guidelines, organize workshops and provide education programs to inform and train national stakeholders. Only with the active involvement of national stakeholders, a marketing and promotion strategy on Islamic tourism can bear expected results as they are main service providers in the sector.

Developing sub-niche markets in the Islamic tourism sector: Islamic tourism products and services available in OIC member countries are concentrated in a few sub-niche markets such as leisure tourism and beach tourism. However, a Muslim visitor who is looking for Islamic health tourism facilities and services may see only limited opportunities available in OIC member countries. Or available ecotourism activities developed with Halal sensitivity may only be found in few places across the OIC region. It is therefore OIC member countries need to heavily invest into product development and diversification of Islamic tourism activities to develop and implement effective marketing and promotion strategies.

Investing into education and training programmes for human capital development: Despite hosting significant number of staff trained for the conventional tourism and hospitality industries, OIC member countries need to develop specific education and training programmes to meet the requirements of human resources profile of the Islamic tourism sector. Trained and specialized personnel on Islamic tourism products and services may help OIC member countries to better meet expectations of Muslim travelers, who can potentially influence their friends and family members in their choice of destination.

Enriching the online content and providing multilingual content for different regions: Increasing number of OIC member countries provide online information through a website about their Islamic tourism products and services. However, only a few OIC member countries follow up the developments in online platforms on a timely basis in order to adjust their marketing and promotion activities. Therefore, OIC member countries need to enhance the information/marketing content available in online platforms including social media. It is also of importance to follow up trends in online platforms and social media with a view to effectively market and promote Islamic tourism products and services. Finally, OIC member countries need to provide multilingual content to reach out potential visitors at different regions.

3.3.4.2 OIC Cooperation Level

Improving Halal certification and standardization: As different Halal certification and standardization schemes are in practice across different OIC member countries, majority of Muslim travelers are in a difficult position to recognize different Halal logos and certificates issued by different

institutions. Another consideration of a Muslim traveler is the reliability of Halal certification and standardization practices related with Islamic tourism products and services seen in different OIC member countries. In order to eliminate different and non-standard practices in the OIC group, it is important to have a standard OIC Halal logo that is easy to recognize. The OIC Halal standards should not stay limited just with the food sector and they should encompass various Islamic tourism products and services from hotels to travel insurance services. In this context, the Standards and Metrology Institute for Islamic Countries (SMIIC) could play a leading role to develop Islamic tourism guidelines and identify requirements to obtain Halal certificate on various Islamic tourism products and services.

Setting targets for the Islamic tourism market to encourage growth: In order to encourage OIC member countries to invest in and develop Islamic tourism products and services, it is important set OIC level targets such as number of Muslim visitor arrivals in the sector and number of hotels with Halal logos across the OIC region. The targets could motivate OIC member countries to follow up more effective marketing strategies as a group. Moreover, these targets could help OIC member countries to track their marketing and promotion performance over time.

Forming an Islamic tourism alliance: Forming an alliance including travel agents and tour operators of OIC member countries working in the domain of Islamic tourism could play a key role in enabling the growth of the Islamic tourism market in OIC destinations. Such an alliance could be an important tool in marketing and promotion activities of OIC destinations.

Establishing a specialized organ within the OIC system to follow up and monitor developments in the tourism sector including Islamic tourism: Unlike in the UN system (specifically UNWTO), developments in the tourism sector in the OIC system is being followed by different OIC institutions. For instance, SESRIC collects statistics and prepares analytical reports in this domain. ICDT organizes tourism fairs. IRCICA promotes Islamic culture and heritage through various activities. However, a specialized body within the OIC system can better oversee and coordinate all these activities as well as develop a capacity to promote Islamic tourism products and services in OIC destinations.

Mobilizing resources for marketing and promotion: In majority of OIC member countries, limited resources have been allocated for marketing and promotion activities of Islamic tourism products and services. To overcome this challenge, OIC member countries, as a group, could develop a special fund to be used for the marketing and promotion of OIC destinations. In addition, Islamic Development Bank Group (IsDB) could start providing funds for projects related to the development of Islamic tourism sector or consider being a sponsor for some of the marketing and promotion campaigns of Islamic tourism destinations in OIC regions.

Organizing fairs and exhibitions for the development of Islamic tourism both at the OIC and sub-regional levels: Fairs and exhibitions could play an important role for the development of Islamic tourism across the globe including OIC member countries. In the OIC system, Islamic Centre for Development of Trade (ICDT) has a long and unique experience in organizing fairs and exhibitions. In this regard, by benefiting from the experience of ICDT, convening regular fairs and exhibitions at different geographical regions of the OIC could help to increase awareness on Islamic tourism destinations, products and services.

Negotiating with the UNWTO to develop and report standard international statistics for the Islamic tourism sector: It is required to have statistics and metrics on Islamic tourism at international standards for cross country comparisons. These set of statistics and metrics could be used to shape Islamic tourism marketing and promotion strategies of OIC member countries as well as to monitor development of the sector at country, regional and international levels. In this context, OIC may consider negotiating with the UNWTO.

Cooperating with regional and international institutions to organize joint roadshows, exhibitions and fairs: Improving dialogue with regional and international institutions could pave the

way to develop some joint projects for the promotion of Islamic tourism products and services such as through experience sharing and identification of best practices. Moreover, jointly organized roadshows, exhibitions, and fairs could help to raise awareness on Islamic tourism products and services available in OIC destinations.

3.4 Destination and Industry Development

3.4.1 What is Destination and Industry Development?

Destination development is closely linked with the progress and advancements recorded in the industry. It is a continuous process of coordination and development of amenities, facilities, products and services that support host communities to deliver quality experiences for visitors and enhance residents' well-being (Sustainable Tourism Online, 2017). A destination in the Islamic tourism industry cannot promote or market products and services that are not available. It is therefore managing destination development is fundamental to successful 'implementation' of tourism management; where destination managers and stakeholders put into action the priority strategies and plans developed during the 'destination planning' process (Sustainable Tourism Online, 2017).

According to the UNWTO and ETC (2011), while developing a destination and industry in a specific market the following steps need to be followed by national tourism authorities. First, a market research needs to be carried out including a 'situation analysis' to understand the current situation, bottlenecks and opportunities for growth. In the second step, national tourism authorities need to make consultations with stakeholders to share the findings of the situation analysis and verify key findings in order to start the 'planning process' and accordingly develop relevant key performance indicators (KPIs) to monitor and measure 'destination performance' over time. In the third step, in the light of stakeholder consultations, national tourism authorities need to identify tourism and product development areas (e.g. Islamic family tourism, Islamic health tourism etc.) where the destination could become competitive enough to attract tourists from a group of countries (regionally or internationally). In the fourth step, national tourism authorities need to articulate an investment plan (e.g. hotels, infrastructure projects, transport networks) to develop the designated destination or a sub-niche tourism sector within the Islamic tourism industry in the country. At this step, it is of importance to consider including human resource development aspect in the investment plan since a visitor's experience in a destination can be greatly influenced by the quality of the services and the personal interactions with host community industry employees throughout their stay. Finally, after fulfilling basic standards in terms of infrastructure quality and services, a set of marketing and promotion tools can be utilized to market the emerging destination and industry at national, regional and international levels.

3.4.2 The Need for Destination and Industry Development in Islamic Tourism

As an emerging niche market in the tourism industry, Islamic tourism is far from reflecting its full potential either it is measured in terms of number arrivals or establishments in OIC member countries. According to STR Global, it was estimated that there are 156,000 hotels worldwide which hosts 14.5 million rooms in 2015. The estimated number of the OIC hotels, based on STR Global estimates and DinarStandard analysis using UNWTO statistics, was 16,000 establishments in 2015, with 1.5 million rooms. In other words, the OIC group hosted about 10.3 per cent of all hotels and hotel rooms in the world in 2015. As indicated in Table 3.4.1, OIC member countries with the largest number of hotels are Turkey, Malaysia, the United Arab Emirates, Indonesia, and Saudi Arabia. Turkey had 3295 hotels in 2015 with more than 300 thousands rooms. However, in Turkey the number of Islamic hotels was 140 that represented a share of 4.3 per cent in all hotels. On the other hand, Malaysia was the leading OIC country both in terms of number of Islamic hotels and its share in all hotel establishments in the

country. In Malaysia 368 Islamic hotels that have been Halal-certified by JAKIM represented a share of 17 per cent in all hotels available in the country. 36 hotels were identified as Islamic (Halal or Muslim-Friendly) in the United Arab Emirates (COMCEC, 2017). In 2015, in Indonesia 35 hotels were found to be Halal certified representing 2.6 per cent of all hotels.

COMCEC (2017) reported that an estimated 60 per cent of Islamic hotels establishments are 4 and 5 star hotels, precisely 403 establishments. The remaining accommodation establishments represent other hotels, resorts, motels, bed and breakfasts, hostels, villas, vacation/peer rentals, and private homes.

The figures on the number of Islamic hotels and their share in all hotels in OIC member countries reveal that Islamic tourism destinations are not well-equipped to reflect the potentials of the Islamic tourism industry that only a small portion of the hotels can fulfill needs of Muslim travelers such as certified halal food and designated prayer room. It is therefore OIC member countries need to design and implement policies to enhance the development of Islamic tourism industry through comprehensive destination and industry strategies.

Table 3.4.1: Number of Hotels in Selected OIC Member Countries (2015)

	No. of Hotels	No. of Rooms	No. of Certified Islamic Hotels	Share of Certified Islamic Hotels in All Hotels (%)
Turkey	3295	306295	140	4.25
Malaysia	2178	202505	368	16.90
United Arab Emirates	1985	184564	36	1.81
Indonesia	1332	123836	35	2.63
Saudi Arabia	1254	116575	Na	

Source: SESRIC Staff Analysis based on data reported in COMCEC (2017). 'Na' stands for not available.

3.4.3 The Role of Standards in Destination and Industry Development in Islamic Tourism

Development of Islamic tourism destination and Islamic tourism industry are closely linked with the standards available in a country. Moreover, it is of importance for destination and industry development whether and to what extent these standards are being implemented. According to UNWTO (2015a), standards in the tourism industry have a positive impact on destinations and industry for their development. In particular, standards for accommodation establishments are key for having a successful development story in the Islamic tourism industry. Accommodation providers reap a number of important benefits by following hospitality standards. Standards also serve as both expectation indicators and quality assurance for guests and lead to increased destination attractiveness and guest satisfaction (COMCEC, 2017). They facilitate comparability and add credibility to hotels' offerings. Other findings also reveal that hospitality standards have a number of positive effects on accommodation establishments adopting them, including signaling quality to consumers, increasing customer satisfaction levels, and achieving higher operational efficiency (Foris, 2014).

As there are no universal standards on Roalamic tourism industry, each country has its own practice. Some countries have a scoring system with various levels while others have only a single level certification on Islamic tourism products and services. Despite having these differences, the most well-known and recognized common elements measured by current standards in the Islamic tourism

industry can be listed as follows: having Halal food, Qibla sign, prayer rug, and the inclusion of a bidet or hand spray in toilets. In some countries and hotel establishments, separate beach for women or supplying guests with lists of mosques and nearby eateries can be included in the list of standards.

Although basic standards in the Islamic tourism industry were in practice, there is limited knowledge about such standards among Muslim travelers. A DinarStandard survey reported in the COMCEC (2017) study showed that only 25 per cent of the respondents were aware of regulations/standards for the Islamic hospitality sector. This implies that Muslim travelers need to know more about standards of the Islamic tourism industry. In the supply side, for the development of destinations and industry it is crucial to raise awareness on standards among service providers in the Islamic tourism industry to reach and maintain a standard quality that would enable countries to attract more tourists.

There are certain steps to be followed in order to set, maintain and improve quality standards in the Islamic tourism industry that can lead to development of destinations and industry. COMCEC (2017) listed that as a first step in, it is critical to form a national body (e.g. center, team, department, unit) to explore existing standards both at the national and international levels. In the second step, this body needs to review all quality standards by engaging with stakeholders through workshops and expert group meetings. In the third step, the body should finalize and issue the national standard criteria for the Islamic industry, which may be subject to change through collecting constructive feedbacks from stakeholders over time. In the final step, the body should promote the new set of criteria in the Islamic tourism industry for its implementation. At the same time, the body should develop an inspection and auditing capacity with a view to conduct inspections and identifying ratings/stars of establishments in the Islamic tourism industry. It is important to carry out these inspections and revisits periodically in order to maintain the standards in the Islamic tourism industry, which would help development of destinations as well as the Islamic tourism industry in OIC member countries.

3.4.4 Islamic Tourism Destination and Industry Development Practices in Selected OIC Member Countries

This sub-section provides an overview from selected OIC member countries on their efforts and initiatives to develop destinations and industry within the context of Islamic tourism. These examples would help to identify some common practices and challenges faced by OIC member countries during the development of the Islamic tourism industry.

Indonesia

There is a strong government commitment and political willingness in Indonesia to develop the Islamic tourism industry. The Ministry of Tourism and Creative Economy and the Indonesian Ulema Council signed a Memorandum of Understanding (MoU) to make Indonesia a premier destination for Islamic Tourism. Also the Indonesian government plays a supportive role in promoting Indonesia as a Muslim travel destination. For instance, the Ministry produced some brochures that highlight the country's best tourism destinations from the Islamic tourism perspective and indicates that there are more than 600,000 mosques in the archipelago. In November 2015 the launch of 'Muslim visitor' was also another important step in this context.

The Ministry appointed a special committee to develop and promote Islamic tourism in Indonesia. The committee is called "Team for Accelerated Development of Halal Tourism". The appointment of the committee not only reflects a high-level commitment for the development of the sector but also helps to overcome some coordination issues.

Some practices followed by Indonesia for the development of Islamic tourism are unique and would constitute good examples for other OIC member countries. For instance, Indonesia selected three provinces to heavily invest and promote the development of Islamic tourism. In terms of standardization and upgrading the quality of services, in Lombok, hotels are promoting themselves as

Islamic, with nine so far having gained coveted 'Shariah' certification. For setting and preserving the standards, Islamic hotels are labeled with the crescent moon, a symbol associated with Islam, with the best receiving three. A hotel must have signs pointing towards Mecca and copies of the Quran in its rooms, as well as a kitchen where halal food can be prepared, to gain its first crescent moon (COMCEC, 2017).

Broadly speaking, the Ministry of Tourism has been working in collaboration with the National Shariah Council (MUI) and the Institute of Business Certification (LSU) with a goal to develop the tourism potential and uphold standards of culture and Islamic values for the development of Islamic tourism industry (Jaelani, 2017). In Indonesia, Jakarta Tourism and Culture Department and the Indonesian Ulema Council (MUI) created a Halal certificate for hotels, restaurants, and caterings in the capital city in an effort to attract more Muslim tourists to these establishments in 2013. The certification was provided free of charge to hundreds of Small Micro and Medium Enterprises that produce foods and beverages in addition to providing them with training on management of Halal production.

The efforts of the Indonesian government to develop Indonesia as an important global destination in the Islamic tourism industry have already started to pay off both in terms of tourist arrival numbers and awards won by Indonesia. For instance, in the competition of the World Halal Tourism Awards 2016 (held in Abu Dhabi, United Arab Emirates), Indonesia won 12 awards from 16 categories contested from airlines to beach resorts (Indonesia Travel, 2016).

Malaysia

In the OIC group, Malaysia has the highest number of Islamic hotels. The share of Islamic hotels in all accommodation establishments reached 17 per cent in Malaysia. Thanks to infrastructure quality and halal ecosystem available, Malaysia is also strong enough to compete internationally in terms of quality of services in the Islamic tourism industry. As a result of high-level political commitment, the Ministry of Tourism and Culture of Malaysia established the Islamic Tourism Centre (ITC) in 2009 to assist and guide the Ministry in its efforts to develop the Islamic tourism industry and make Malaysia a hub destination. Apart from providing guidance, ITC also provides training and capacity-building services in relation to Islamic tourism. With stakeholder engagements and consultations, ITC developed a blueprint document in 2012 titled the "Strategic Plan for Islamic Tourism Development". This document outlined 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 in Malaysia. Apart from other contributions for the development of the industry, ITC also plays role in marketing efforts through sponsoring or actively participation international exhibitions, fairs, and roadshows to promote and market Malaysia as a hub destination in the Islamic tourism industry.

In terms of standardization, which is key for the development of the Islamic tourism industry in a destination, Malaysia exerted significant efforts. The Muslim-Friendly Hospitality Services standard - MFHS (MS 2610:2015) is a standard issued by the Department of Standards Malaysia that is the national standards and accreditation body of Malaysia under the Ministry of Science, Technology, and Innovation (MOSTI). The creation of MFHS follows the Malaysian government's recommendation in the Malaysian Islamic Tourism Blueprint (Strategic Plan for Islamic Tourism Development) to develop a benchmarking and quality assurance mechanism for Islamic Tourism in the country. The Muslim-Friendly Hospitality Services standard was developed through consensus by a technical committee, which comprised of a balanced representation of producers, users, consumers, and other relevant stakeholders. The use and adoption of MFHS is voluntary. The objectives can be summarized as follows:

- Enhancing the ability of an organization or individual to produce and/or manage Muslim-friendly tourism products and services;

- Preserving the protecting the integrity of Muslim-friendly tourism products and services through the application of the standard; and
- Enhancing the customer satisfaction by meeting their needs and requirements.

Apart from MFHS, the Islamic Tourism Centre (ITC) and the Halal Hub Division under JAKIM have collaborated on a program for the MFT industry products and services providers on Halal certification and standardization. The targeted providers include hoteliers and homestay operators, travel and tour operators, airline companies, and tourism associations.

In a nutshell, the political willingness and commitment in Malaysia for the development of the Islamic tourism industry led to the establishment of a dedicated body (Islamic Tourism Centre-ITC). Only after that Malaysia achieved to develop a blueprint document, standards for the industry, stakeholder engagement activities as well as training programmes. All these efforts helped Malaysia to emerge as a Islamic tourism destination hub not only in its region but also in the globe.

Turkey

The Turkish Ministry of Culture and Tourism was motivated by the fast developments in the Islamic tourism industry both in Turkey and around the world to start to develop its regulations by 2017. The Ministry envisages that the new legislations not only help eliminating non-standard practices in the industry but also boost number of travelers seeking Islamic tourism products and services both from Turkey and around the world.

In Turkey, development of Islamic tourism industry was mainly driven by the private sector. As of 2015, 140 certified Islamic hotels provide services for travelers. More recently, public authorities have started to pay more attention in order to set and maintain standards in the industry. In terms of standardization and certification, Turkish Standard Institute (TSE) launched its Islamic tourism standard - TS 13683 Halal Management System-Hotels - in February 2016 after two and a half years of preparation. As there are many common elements measured across Islamic tourism standards, Turkey's TS 13683 has some novelties such as having an internet content filter, anti-noise insulation for room, bathroom and prayer area, public wudu area, reading room with Islamic literature, Friday prayers or transport to local mosque, modest staff attire, Shariah-compliant code of conduct for staff and guests, traditional and Western toilets on site, toilet not facing Qibla, pet management policies, and having Islam-appropriate art, artists, posts, music, entertainment, etc.

For the development of industry, the SME Development and Support Administration (KOSGEB) provides subsidies to tourism SMEs targeting foreign markets including those targeting Muslim consumers. The KOSGEB supports SMEs through refunding them up to 75 per cent of their expenditure on marketing (COMCEC, 2017).

Turkey hosted the 2nd International Halal Tourism Conference in the city of Konya in May 2016 with a strong support from the Ministry of Culture and Tourism. Mahir Unal, Minister of Culture and Tourism of Turkey attended the opening of the event. Delegates from over 30 countries with over 110 buyers attended the conference including United Arab Emirates, Saudi Arabia, Iran, Croatia, Singapore, UK, USA, Malaysia, Indonesia, South Africa, Kuwait, and Qatar including tourism boards, travel agencies, tour operators, hotels and airlines. Organization of this event with a support from the Ministry is a reflection of political willingness and commitment that aims to develop Turkey as an important destination in the Islamic tourism industry.

Finalization of set of standards, eagerness of the private sector, and political willingness would be key success factors in Turkey's journey towards being an important Islamic tourism destination with well-established industry players.

3.4.5 Major Issues and Challenges

Major issues and challenges faced by OIC member countries during the destination and industry development process in the domain of Islamic tourism can be summarized as follows:

The cost of implementation: A country that is willing to develop its Islamic tourism industry and has a goal to emerge as major destination in the world needs to realize certain investments and complete necessary steps. For instance, from the public side, establishment of a unit responsible for the Islamic tourism industry in the Ministry, development of standards and certification bodies, setting the inspection and rating mechanisms require certain investments and human capital. From the private sector perspective, hotels need to invest into their establishments in order to ensure that they meet all criteria for the 'Halal certificate' including building up designated common prayer rooms, gender segregated pools, and all halal restaurants. However, it is important to note that not all Halal related investments are costly in the Islamic tourism industry. For instance, costs of putting a Qibla sign, a Quran and prayer rug into each room of a hotel are negligible when their benefits are taken into consideration. A hotel with such basic services may start marketing itself at least as a Muslim-friendly establishment.

Different interpretation of "Halal Concept" across Islamic schools: Existing differences across different Islamic schools in certain issues may constitute a challenge for service providers in the Islamic tourism industry. Also varying degrees of sensitivity of a Muslim traveler on Halal issues is another challenge that sometimes creates dissatisfaction among travelers. In this regard, development and implementation of Halal standards at the OIC level for the Islamic tourism industry in collaboration with Islamic scholars and national bodies may help to minimize such different interpretations and pave the way to reach a common understanding on standards.

The lack of universal standards and ratings on Islamic Hotels: Unlike in the universal star-rating system present in the conventional tourism industry, the Islamic tourism industry still could not come up with its own universal standards and rating system. It is therefore a Muslim traveler's experience in the Islamic tourism industry may differ across countries. Even it is likely to see some differences in the quality of services in the Islamic tourism industry within the same country. In this regard, the lack of such universal standard quality and rating systems constitute an important barrier for the development of the Islamic tourism industry. According to COMCEC (2017), 61 per cent of Muslim travelers find the presence of multiple standards to be confusing that reflects the importance of harmonization of standards. Finally, the shortage of experienced inspectors, who are well versed in the accommodation sector, poses a serious challenge to implementing the Islamic tourism standards once they are developed.

Misperceptions and limited knowledge about the importance and potential of Islamic Tourism: Islamic tourism industry serves a sub-set of travelers who would like to have a 'Halal' tourism experience. However, there is a misperception among some tourism industrialists that the rise of Islamic tourism may alienate conventional tourists. In fact, it is not true. For instance, Halal standards are optional for hotels who would like to implement them. Removal of alcoholic beverages from a minibar in a hotel room does not mean that a hotel may not meet expectations of conventional tourists. It is therefore such misperceptions need to be addressed with right messages. Although the Islamic tourism industry has been recording significantly higher annual growth rates, this fact is not well-known among private sector players and policy-makers. Once the population of Muslims living across the globe and positive trends seen in income levels of OIC member countries are taken into consideration, it becomes evident that the Islamic tourism industry has the potential to make a meaningful contribution to the growth of tourism industry as well as national economies. Limited knowledge about the importance and potential of Islamic tourism hinders the development of industry in several ways. For instance, the limited knowledge about the importance and potential of Islamic

tourism industry sometimes reduces funding options for investment projects. Conventional banking system agencies may be reluctant to support such projects. On the other hand, policy-makers with limited knowledge about the industry may be less interested in projects and proposals including infrastructure that can trigger the growth of the industry.

3.4.6 Proposed Actions and Policies for Development of Islamic Tourism in the Domain of Destination and Industry Development

3.4.6.1 National Level

Raising awareness on Islamic tourism: It is of importance to raise awareness on Islamic tourism among policy-makers, industry players as well as travelers. The limited knowledge on Islamic tourism services and products, standards as well as existing misperceptions constitute hindrance for the development of the sector. It is therefore national campaigns, education and training programs need to be designed and implemented to increase overall knowledge of society about the sector. Moreover, specific targeted programs designed for hoteliers, tour operators, travel agencies, tourism authorities, and airport staff such as on basics of Islamic tourism and sensitivities of Muslim travelers would help to create a more favorable environment for Muslim travelers.

Forming a national body/team/unit and preparing a strategy for destination and industry development on Islamic tourism: As the development Islamic tourism industry requires collaboration among different public institutions such as standardization and certification bodies, tourism authorities, marketing agencies, it is critically important to form a dedicated national body/team/unit in order to avoid potential conflicts across different institutions. Such a unit would provide bird's eye view of the industry and are therefore best-placed to make long-term policy decisions for the development of a destination. During the preparation of a strategy for the development destination and industry, national bodies first need to identify relevant stakeholders and engage with them in order to come up with comprehensive destination development plans including identification of sub-niche markets within the Islamic tourism industry (e.g. Islamic Health Tourism, Islamic Eco Tourism) and investment priorities that can be widely accepted by all parties during their implementation. The strategies of the national body need to list specific action points for all sectors (transportation, accommodation, food and beverage, travel services agencies, ancillary services, and tourism activities) for a successful take off in the industry.

Addressing standardization and certification issues: Developing a national capacity to standardize and certify the services and products in the Islamic tourism industry would help to eliminate a set of factors that hinder the development of any destination as an Islamic tourism hub. In particular, standards would help to increase the satisfaction of Muslim travelers' experience with Islamic tourism services and products that would help to trigger the growth figures in the industry.

Financing investments: As investment projects require funding, it is important to create funding mechanisms to finance investment projects in the Islamic tourism industry. Other types of incentive mechanisms such as subsidies or tax-exemptions may also be considered in order to encourage investments in the Islamic tourism industry especially till the industry reaches a certain level of maturity.

Developing human capital: Without well-trained staff on Islamic tourism hospitality neither a destination nor the industry would become competitive in the global tourism market. In this regard, national capacities need to be developed through training and educating staff to work in the industry. Such training and education programs should not only target the hotel staff (e.g. receptionist, steward, cleaner etc.) but all segments of the industry including tour operators, travel agencies, and tour guides.

3.4.6.2 OIC Cooperation Level

Raising awareness about the importance and potential of the industry: As an intergovernmental organization, the OIC needs to embark on awareness raising activities about the importance and potential of the industry in cooperation with member countries, regional and international organizations. Such activities may include international fairs, exhibitions, roadshows, forums, seminars and workshops. These activities not only would help to raise awareness on destinations in OIC member countries but also would encourage businessmen and investors to explore trade and investment opportunities in the industry.

Cooperating with OIC member countries to develop joint-capacity building programs: In some OIC member countries the Islamic tourism industry has reached a certain maturity level. In such OIC member countries national institutions are also well-advanced in terms of standardization, certification and regulation of the industry. In this regard, the OIC needs to come up with a plan to develop joint (multilateral) capacity building programs with a view to, share experiences with other OIC member countries who are about to start their destination and industry development process. For instance, Islamic Tourism Centre of Malaysia and Ministry of Tourism in Indonesia could initiate joint-training and/or capacity building programs on destination improvement policies in the Islamic tourism industry targeting tourism officials from OIC member countries in the North Africa or Central Asia regions.

Mapping best practices in OIC member countries: Preparation of a report by the OIC with a view to identify and map best practices in OIC member countries in the domain of destination and industry development practices would help OIC member countries to learn and understand common factors and mechanisms behind successful destination and industry development policies. In particular, the 'Reverse Linkage' framework of the Islamic Development Bank Group could be a useful tool in such a mapping exercise.

Tourism infrastructure development fund: The limited sources available for tourism infrastructure projects constitute an important barrier for the development of destination and industry in Islamic tourism. However, investments into tourism infrastructure would boost growth of the tourism sector including both conventional and Islamic. Moreover, other sectors such as transport and communication would also benefit from investments made to improve the quality of tourism infrastructure. For instance, construction of a new airport into an emerging city in the domain of Islamic tourism in a certain OIC member country not only would help to attract more tourists but also could improve connectivity of local residents. It is therefore relevant bodies of the OIC in particular Islamic Development Bank (IsDB) Group need to mobilize its sources to support tourism infrastructure projects. Scaling up tourism infrastructure projects in OIC member countries may also be achieved through establishment of a specialized "tourism infrastructure development fund" under the guidance of (IsDB) Group and with active involvement of OIC member countries. Such a fund may be used to finance infrastructure and real estate projects with more flexible terms and by paying a specific attention to the development of Islamic tourism industry. For instance, Malaysia established a tourism infrastructure development fund to support the development of tourism related real estate projects by offering mortgage assistance.

Easing visa policies: Facilitation of visa regimes and policies has been in the agenda of the OIC for a long time with a view to boost intra-OIC tourism. However, there is still limited progress in this folder. The OIC needs to emphasize the importance of the visa facilitation issue at relevant OIC meetings and foras with a view to convince member countries and raise awareness among policy-makers. An eased visa regime among OIC member countries could help to trigger movement of Muslim travelers. As a result, destinations in the Islamic tourism industry would record significant growth both in terms of tourist arrivals and tourism receipts.

3.5 Capacity Building

3.5.1 Key Concepts and Importance of Capacity Building

Capacity building strategies constitute an essential part of any national tourism strategy. In fact, achieving national objectives in any sector relies on the capacities of individuals, organizations and societies. Islamic tourism, as an emerging niche market in OIC member countries, needs to be developed on different levels to cater to the needs of the growing segment of Muslim travelers.

The terms of capacity development and capacity building were used interchangeably in the literature over the past ten years (UNDP, 2009). Although both concepts have different connotations, they are strongly related (see Box 3.5.1). It is therefore important to clarify that the term of capacity building used in this section counts for both capacity building and development definitions. In the domain of Islamic tourism, capacity building aims at both improving the existing capacities as well as building up a new capacities in OIC member countries from training staff in the hospitality establishments to developing certification mechanisms.
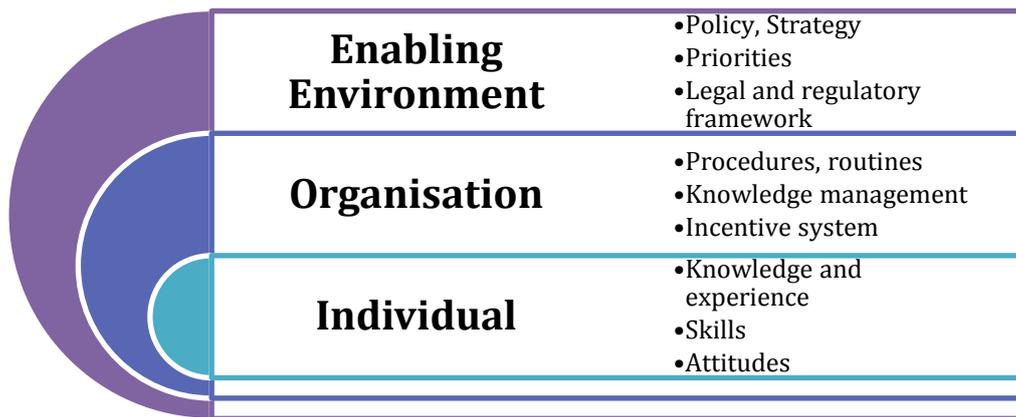

Box 3.5.1: Capacity Development or Capacity Building?

Capacity development commonly refers to the process of creating and building capacities and their (subsequent) use, management and retention. This process is driven from the inside and starts from existing national capacity assets. This approach is premised on the fact that there are some capacities that exist in every context. It uses this existing base of capacities as its starting point and then supports national efforts to enhance and retain them.

Capacity building commonly refers to a process that supports only the initial stages of building or creating capacities and alludes to an assumption that there are no existing capacities to start from. It is therefore less comprehensive than capacity development. Capacity building can be for example relevant to crisis or immediate post-conflict situations where existing capacity has largely been lost due to capacity destruction or capacity flight. It encompasses areas where new capacities have to be introduced and hence, the building of new capacity is supported.

Source: UNDP (2009)

Capacity building could be defined as "the process through which individuals, organizations and societies obtain, strengthen and maintain the capabilities to set and achieve their own development objectives over time". According to this definition, there are three levels of capacity: individual, organizational and societal (Box 3.5.2). In the literature, the organizational level and institutional level terms are used interchangeably. On the other hand, the term 'societal level' sometimes named as 'institutional' or 'enabling environment'. This inter-relatedness among the three levels implies that capacity building activities need to consider all these aspects carefully for achieving higher efficacy (Figure 3.5.1).

Figure 3.5.1: Levels of Capacity Development

Enabling Environment	• Policy, Strategy • Priorities • Legal and regulatory framework
Organisation	• Procedures, routines • Knowledge management • Incentive system
Individual	• Knowledge and experience • Skills • Attitudes

Source: UNESCO (2016)

Box 3.5.2: Levels of Capacity Building in Islamic Tourism

The three levels of capacity in Islamic tourism are as follows:

The **enabling environment** of Islamic tourism is the term used to describe the broader system within which individuals and organizations function and one that facilitates or hampers their existence and performance. This level of capacity is not easy to grasp tangibly, but it is central to the understanding of capacity issues.

Capacities at the level of the enabling environment include policies, legislation, power relations and social norms, all of which govern the mandates, priorities, modes of operation and civic engagement across different parts of society. Enabling the appropriate environment for the development of Islamic tourism sector could be realized through developing strategies and the set of standards and guidelines. In fact, these standards play a crucial role in establishing the country's credibility in the Islamic tourism industry through consolidating best practices, creating systematic development and preventing misuse and abuse. Furthermore, the existence and conformity to standards and guidelines in a country creates a trustable environment and services which is crucial for attracting Muslim visitors from all over the world.

The **organizational level** of capacity comprises the internal policies, arrangements, procedures and frameworks that allow an organization to operate and deliver on its mandate, and that enable the coming together of individual capacities to work together and achieve goals. If these exist, are well-resourced and well-aligned, the capability of an organization to perform will be greater than that of the sum of its parts. For instance, providing a rating system for hotels, restaurants, tour operators, airlines and all types of travelling services in the domain of Islamic tourism provides a framework for the travelling services to operate according to the agreed standards within the Muslim community.

At the **individual level**, capacity refers to the skills, experience and knowledge that are vested in people. Each person is endowed with a mix of capacities that allows them to perform, whether at home, at work or in society at large. Some of these are acquired through formal training and education, others through learning by doing and experience in the domain of Islamic tourism. The three levels of capacity are mutually interactive and each level influences the other through complex co-dependency relationships.

Source: Adapted from UNDP (2009)

For example the capacity building in the domain of Islamic tourism may include preparing the Islamic tourism national strategy and related policies in the societal level. However, the national strategy could be implemented successfully, if only the implementing bodies or institutions are equipped with necessary knowledge and experience. Following this logic, organizations may be unable to fulfill their mission, if its human capital is lacking needed capacities towards the achievement of its pre-defined objectives and goals. On the other hand, it is always important to stay updated in the process of capacity building about new trends and directions in the domain of Islamic tourism. For instance, the increasing interest to the Islamic culture and heritage sites necessitate development of capacities in this specific area such as training of tourist guides on the Islamic culture and heritage sites and developing new tour packages.

3.5.2 Types of Capacity Building in the Domain of Islamic Tourism

Capacity building covers a wide range of activities aiming to empower individuals and institutions through different approaches. According to the Urban Capacity Building Network, capacity building includes the development of human resources through equipping individuals with the necessary skills, access to information, knowledge and training with a view to achieve higher performance and efficiency. In the domain of Islamic tourism, for example, training of staff on the faith based needs of Muslim travelers would increase the quality of provided services and in turn would help to attract more travelers. The second level concerns organizational development through the establishment of management structures, processes and procedures within the organizations as well as the management of relationships between the different institutions such as Islamic tour operators or hotels. The third level aims to develop the institutional and legal framework through regulatory changes A detailed list of the common types of capacity building activities is presented in Box 3.5.3.

Box 3.5.3: Common Types of Capacity Building Activities in Islamic Tourism

- Assessments
- Business planning
- Business development
- Collaboration planning
- Conflict resolution
- Convening
- Earned-income development
- Evaluation
- Facilities planning
- Financial management
- Peer learning
- Project management
- Quality management
- Program design
- Strategic planning
- Knowledge sharing on sustainable Islamic tourism practices.
- Information exchange
- Leadership development
- Development of legislations and policies
- Management development
- Marketing (research, promotions)
- Meeting management
- Networking opportunities
- Raising awareness
- Organizational development
- Funding
- Fundraising
- Research projects
- Risk management
- Staffing (selection, development)
- Trainings
- Setting the industry standards

Source: Adapted from McNamara (2005)

3.5.3 Islamic Tourism Capacity Building Practices in Selected OIC Member Countries

Malaysia

Malaysia is considered as one of the leading countries in terms of capacity building in the domain of Islamic tourism. The commitment of the Ministry of Tourism played a vital role through ensuring an enabling environment for the development of Islamic tourism in Malaysia. At the outset, identification of the Muslim market as a priority for the development of tourism sector was very critical. In this regard, the Islamic Tourism Centre of Malaysia (ITC) was established in 2009 to undertake strategic tourism research and market intelligence as well as providing training and capacity-building services in the domain of Islamic tourism through seminars, workshops and training courses for the industry players. Box 3.5.4 presents some of these initiatives of ITC in the domain of capacity building.

In Malaysia, the enabling environment in Islamic tourism also paved the way for the emergence of private companies such as MyRating that provides consultancy, training and capacity building programs for establishments in the industry. For instance, in the domain of training and capacity building, the organization offers certified courses by the Malaysian government or established institutes in Islamic tourism that meet the needs of the industry (MyRating, 2016). A short list of courses offered by MyRating can be listed as follows:

- Muslim Friendly Hotel and Resort Management,

- Muslim friendly Health Tourism,

- Halal Food Technology Management,

- Halal Assurance System,

- Halal Branding and Marketing,

- Halal Logistics,

- Halal Awareness in Tourism and needs of Muslim Traveler,

- Halal Awareness in Food Manufacturing,

- Halal Awareness for School Teachers and Principals,

- Halal Awareness in Facility Management, and

- Halal Awareness in Design and Construction Industry

3.5.3 Islamic Tourism Capacity Building Practices in Selected OIC Member Countries

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Box 3.5.4: Initiatives of the Islamic Tourism Centre of Malaysia in the Domain of Capacity Building

ITC's past initiatives:

- Collaboration with local universities in carrying out researches and training programmes on Islamic tourism.
- Organisation of training courses under the Malaysian Technical Cooperation Programme (MTCP).
- Organisation of seminars on community-based tourism for third world countries in collaboration with Japan International Cooperation Agency (JICA).
- Organisation of Regional Seminars on Islamic Tourism (ReSIT) with regards to Islamic tour packages and tourism trails.
- Organisation of Joint Seminars on Islamic Tourism (JoSIT) to discuss matters regarding the sustainability of Muslim tourist arrivals in Malaysia, Indonesia and Brunei.
- Organisation of the International Islamic Tourism Conference & Travel Mart (ITCM) 2010.
- Co-organisation of the International Islamic Tourism & Halal Conference (IISTHAL) 2009 in collaboration with KHAAZ International and GITC Secretariat.
- Main supporter of the 1st International Islamic Tourism Standard Conference, the Islamic Fashion Festival 2012, the World Islamic Tourism Mart (WITM) and the OIC World BIZ (OWBIZ).
- Publication of a blueprint with Akademi Aidit titled 'Strategic Plan for Islamic Tourism Development'.
- Worked with local tour operators in developing custom-made tour packages to fulfil the needs of Muslim tourists and published the 'Malaysia: The Islamic Tour Experience' booklet.
- Collaboration with Brunei Tourism Development Department in producing the 'Brunei and Malaysia: The Islamic Tour Experience' booklet.
- Publication of a comprehensive guide on Malaysia's most remarkable mosques titled 'Mosque Trails in Malaysia'.

ITC's future initiatives:

- Collaboration with other Southeast Asian countries – namely Brunei, Indonesia, Thailand and the Philippines – in organising seminars and workshops on the development of Islamic tourism within the region.
- Development of standards and guidelines for Malaysia's Islamic tourism sector in a bid to improve the country's tourism products and services.

Source: Islamic Tourism Centre of Malaysia (2016)

Indonesia

Disposing of a great potential and rich culture, Islamic tourism in Indonesia represents a promising market to be developed. In this context, building capacity of Islamic tourism gained an increasing importance and was expressed through several efforts aiming to develop this industry at the three levels of capacity building.

At the political level, the government's engagement to target and position Indonesia as an Islamic destination played a crucial role in enabling the environment for the development of this sector. In fact, one of the main initiatives in building capacity of the Islamic tourism in Indonesia is represented through the efforts of the National Tourism Organization to develop this sector. In this regard, the

National Tourism Organization adopted an inclusive plan to target the Islamic tourism market and developed promotional programs with a view to representing Indonesia as an Islamic destination for Muslim travelers. Furthermore, it launched the Muslim Visitor's Guide to Indonesia in November 2015 as well as prepared standards for Islamic hotels and related services. Additionally, the Ministry of Tourism and Creative Economy signed MoU with the Indonesian Ulema Council to work on positioning Indonesia as a premier destination for Islamic tourism. Indonesia hosted many international events that contributed to the development of a national capacity such as the OIC's First International Forum on Islamic Tourism and the 12th World Islamic Economic Forum (WIEF), which were held in Jakarta, Indonesia in 2014 and 2016, respectively.

At the individual level, human resources in Indonesia have good knowledge towards catering to the needs of Muslim travelers. Furthermore, many workshops were organized to improve capacity of staff working in the industry.

3.5.4 Major Issues and Challenges

Investing into capacity development in the domain of Islamic tourism is a necessary step for those OIC member countries that would like to benefit from the promising opportunities in this niche market of the tourism industry. Within this framework, it is important to be aware of the challenges and issues faced in this area in order to develop policies that address them. Some of the major challenges that hinder the building of capacities in the domain of Islamic tourism are listed below:

Limited knowledge and research studies: As a new emerging segment of the tourism industry, the importance of the Islamic tourism is still not well-understood by many policy makers. The number of research studies that provide an analytical analysis is too limited, although such studies could constitute a basis for building capacities in OIC member countries. In fact, unless organizations and individuals are full aware of the benefit of investing in Islamic tourism, they would not be motivated to invest in this area. In this regard, conducting market research studies and communicating their results with a view to highlighting the value of Islamic market as an emerging market would play an important role in encouraging all concerned parties in building capacities.

Coordination among the three levels of capacity building: The three levels (enabling environment, organizations and individuals) are complementary to each other and any lack of coordination and harmonization among the three levels could cause a dysfunction in the whole system.

Concerns of the tourism industry investors: Some investors in the domain of tourism may think that building capacities in Islamic tourism will intimidate non-Muslim tourists. However, it should be clarified and communicated to all parties that development of Islamic tourism would not affect the conventional tourism. In contrast, newly established capacities, facilities and infrastructure may enhance the growth of the entire tourism industry.

Poor infrastructure: In many OIC member countries, the lack of infrastructure is considered as a big obstacle to building capacities and there is much work to do in the domain of tourism in general and the Islamic tourism in particular.

3.5.5 Proposed Actions and Policies for Development of Islamic Tourism in the Domain of Capacity Building

3.5.5.1 National level

Carrying out market research at the national level: It is important to get evidence based information before developing national strategies with a view to finding out the most suitable regions/provinces for the emergence of Islamic tourism and identifying the areas of focus for capacity building activities.

Conducting seminars and workshops for the local industry: It is important to share knowledge with the local industry players in order to equip them with basics of Islamic tourism. Through organizing

seminars and workshops, it is also likely to spread the message that there is strong willingness and commitment of government to build capacity in the domain of Islamic tourism.

Raising awareness on the importance of capacity building for the development of Islamic tourism: As an essential tool for development, capacity building will play a crucial role in the development of Islamic tourism as a holistic and strategic approach covering the three levels: the enabling environment, organizations and individuals. In this regard, it is worth noting that synergy among the three levels of capacity building is crucial for a successful development. In this regard, all actors should be aware of their roles within the whole system. It is critical to ensure proper communication and cooperation among various stakeholders such as tour operators, travel agencies as training and certification institutions.

Developing a national strategy for capacity building in the domain of Islamic tourism: As the development of Islamic tourism requires building capacities on its three levels (societies, organizations and individuals), a national strategy that identifies the role of all players is critical for the success and sustainability of the sector.

Building capacities of human capital: Developing human capital requires learning and applying new ideas, competencies, skills, behaviors and attitudes. In this regard, training and education are necessary for the development of national capacities in the domain of Islamic tourism. It is therefore OIC member countries need to develop and open up new education and training programs with a view to meet the professional staff demand originating from market players in the Islamic tourism industry.

Developing national capacity on standardization and certification: It is important to have national standards and certification arrangements for Islamic tourism in OIC member countries. However, in many OIC member countries, such arrangements are either missing or underdeveloped. In this regard, it is crucial to invest into national capacity building programs with a view to develop standardization and certification bodies equipped with well-trained staff.

3.5.5.2 OIC Cooperation Level

Harmonization and unification of standards and certification: There is a lack of unified and harmonized halal standards in OIC member countries. Building up an OIC capacity in this area requires encouraging the establishment of national bodies responsible to certify hotels, food, destinations and Islamic products according to the industry requirements. The Standards and Metrology Institute for the Islamic Countries (SMIIC), as a sound mechanism for harmonization of standards among OIC member countries and for preparation of new ones, could play a crucial role in harmonizing the Islamic tourism standards in OIC countries.

Sharing knowledge and experience to build capacities: In the OIC group, there are more advanced countries in the domain of Islamic tourism such as Malaysia, Indonesia, and United Arab Emirates. Developing knowledge and experience sharing programs could be beneficial to help newly emerging OIC destinations in the domain of Islamic tourism to build up their capacities.

Raising awareness about the Islamic heritage sites: Islamic heritage sites in OIC member countries could play an important role for the development of Islamic tourism. In this regard, OIC and its implementing bodies as well as OIC member countries need to develop capacities with a view to identify and promote the Islamic heritage sites in OIC member countries. For instance, development of a social media strategy and establishment of an OIC satellite channel to raise awareness about the OIC Islamic heritage sites could be two important tools to reach more people in OIC member countries and the world.

Improving cooperation among OIC institutions and member countries to build capacity in the domain of Islamic tourism: OIC institutions such as SESRIC and ICDT in collaboration with member countries could develop joint capacity building programs for the benefit of OIC member countries in Islamic tourism. These programs would help to strengthen skills of public officials and develop institutional capacities in OIC member countries.

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Implementation Matrix

Thematic Area of Cooperation 1: Data and Monitoring

Objective	Activity	Coordinator	Member Institutions/ Countries	Timeline
1. Develop national Islamic tourism indicators for the collection, collation, processing, and dissemination of Islamic tourism data	**National Level** 1.1 Establish specific units or designate staff under the relevant stakeholders of the national statistical system with a mandate to develop national Islamic tourism indicators. 1.2 Conduct the development of national Islamic tourism indicators based on the proposed Purpose, Production, Permanence indicator development framework.	National Statistics Office of OIC Member Countries		
2. Strengthen national statistical systems and the coordination role of national statistical offices in the production and dissemination of Islamic tourism indicators	**National Level** 2.1 Conduct a needs assessment of statistical capacities for the production and dissemination of Islamic tourism data at the national level and an assessment of available resources to address those needs, including those related to technical cooperation, training, and sharing of best practices that may be offered by OIC countries. 2.2 Integrate production and dissemination of Islamic tourism indicators into a) the established work programmes of national statistical systems; b) existing national statistical strategies for the development of statistics (NSDS); and c) national and sector development plans and priorities. 2.3 Adopt and implement the Tourism Satellite Accounts approach by creating a well-established coordination mechanism among the relevant stakeholders of the national statistics system.	National Statistics Office of OIC Member Countries		

3. Ensure that resources are available to implement the necessary programmes and actions for the development, production, and dissemination of Islamic tourism indicators	**OIC Level**	
	3.1 Facilitate the relevant platforms to reach a universally agreeable definition of Islamic Tourism which will guide development of the relevant Islamic tourism indicators.	OIC GS
	3.2 Identify needs and capacities of OIC member countries concerning the production and dissemination of Islamic tourism indicators.	SESRIC
	3.3 Conduct statistical capacity building activities on the basis of indicated needs and capacities on Islamic tourism indicators.	
	3.4 Communicate activities at the policy-making level to raise awareness about the Islamic tourism indicators.	
	3.5 Encourage sharing of recommended practices on the development, production, and dissemination of Islamic tourism indicators between OIC member countries.	
	3.6 Ensure the proper dissemination of Islamic tourism indicators through an online database.	

Thematic Area of Cooperation 2: Policy and Regulation Development

Objective	Activity	Coordinator	Member Institutions/ Countries	Timeline
1. Formulating and implementing national policy and regulations for the development of Islamic tourism market	**National Level** 1.1. Establish national Islamic tourism committee/taskforce. 1.2. Develop and drive Islamic tourism market policy and growth strategy. **OIC Level** 1.3 Establish a unified national Halal regulatory framework for the Islamic tourism industry.	SMIIC		
2. Promoting development of Islamic tourism industry through conducive administrative and financial measures	**National Level** 2.1. Promote development of Islamic finance services. 2.2. Support the SMEs active in Islamic tourism sector. **OIC Level** 2.3. Organize events on visa facilitation policies and processes. 2.4 Establish Islamic tourism infrastructure development fund.	OIC GS IsDB		
3. Enhancing intra-OIC cooperation to spearhead the development of Islamic tourism sector in particular in the domain policy and regulation development	**National Level** 3.1 Raise awareness at the national level about the potentials and experience of OIC countries in developing national policies and regulations. **OIC Level** 3.2 Promote unified OIC Halal standards. 3.3 Promote and raise awareness on the importance of developing an OIC Common Visa Scheme.	OIC GS		

Thematic Area of Cooperation 3: Marketing and Promotion

Objective	Activity	Coordinator	Member Institutions/ Countries	Timeline
1. Establishing a coordination unit/task force/center to design and implement marketing and promotion activities for the development of Islamic tourism	**National Level** 1.1. Form a national committee or unit for development of Islamic tourism and draw a national marketing and promotion strategy for the development of Islamic tourism. 1.2. Carry out a market research that includes a SWOT analysis of the sector. 1.3 Determine a marketing slogan and logo at the national level. **OIC Level** 1.4 Form a working group/committee/specialized organ to set out targets for the OIC group on marketing and promotion of Islamic tourism, monitor progress, and regularly report to the ICTM.	OIC GS		
2. Promoting Islamic tourism hotels and tour agencies in OIC countries	**National Level** 2.1 Organize regional fairs for Islamic tourism service providers. **OIC Level** 2.2. Invite Islamic tourism hotels and tour agencies to the 3rd and 4th OIC Tourism Fairs for the purpose of showcasing their products, services, and tour packages. 2.3. Organize OIC Islamic tourism fairs at three sub-regions of the OIC namely Asia, Africa and Arab regions.	ICDT		
3. Enriching the online/offline content for Islamic tourism products and services	**National Level** 3.1 Develop a multilingual website with rich contents (text and image) to reach potential customers.			

	3.2 Develop a social media strategy for marketing and promotion of Islamic tourism products and services. **OIC Level** 3.3 Develop a multilingual OIC portal to market and promote Islamic tourism in OIC destinations. 3.4 Effectively develop a 'OIC Islamic tourism logo' and 'slogan' for branding of OIC countries as a group.	ICDT SMIIC
4. Improving networking among Islamic tourism service providers in OIC countries	**National Level** 4.1 Establish a platform for national stakeholders in the Islamic tourism sector to organize joint marketing and promotion campaigns. **OIC Level** 4.2. Form an OIC Islamic Tourism Alliance as a single platform with a view to improve coordination among national level platforms/alliances of Islamic tourism in OIC countries.	OIC GS
5. Enhancing the marketing power of OIC destinations on Islamic Tourism and mobilizing resources	**National Level** 5.1 Develop incentive mechanisms for national Islamic tourism service providers in OIC countries to attend international tourism fairs and exhibitions to showcase their products, services, and tour packages. **OIC Level** 5.2 Organize joint conferences, activities and fairs with international and regional organizations in the domain of tourism with a view to integrate agenda items related with Islamic tourism in OIC countries. 5.3 Improve communication with UNWTO to find out potential areas of cooperation and projects. 5.4 Form a special fund to market and promote Islamic tourism in OIC countries.	OIC GS IsDB

6. Improving human resources quality in Islamic tourism industry	**National Level**		
	6.1 Provide elective courses at tertiary education on 'Islamic tourism' in tourism and hospitality programs.		
	6.2 Develop vocational education and tertiary education programs on Islamic tourism and use such information effectively in marketing and promotion activities.		
	OIC Level		
	6.3 Organize training and capacity development programs for OIC countries on tourism marketing and promotion concepts.	SESRIC	
	6.4 Open up new education programs both at undergraduate and graduate levels to develop a specialized human resources capacity in OIC countries.		IUT
7. Developing sub-niche markets within the Islamic tourism sector	**National Level**		
	7.1 Collaborate with national stakeholders to find out sub-niche markets that has a potential for Islamic tourism.		
	7.2 Provide support in new sub-niche markets to upgrade their services in line with Islamic tourism standards.		
	7.3 Select the most competitive sub-niche markets within the Islamic tourism sector and promote these sectors effectively such as health tourism or ecotourism.		
	OIC Level		
	7.4 Organize workshops and training programs to raise awareness, exchange of views and experience sharing in OIC countries on selected sub-niche Islamic tourism sectors.	SESRIC	

Thematic Area of Cooperation 4: Destination and Industry Development

Objective	Activity	Coordinator	Member Institutions/ Countries	Timeline
1. Establishing a coordination unit/task force/center to design and implement destination and industry development activities in the domain of Islamic tourism	**National Level** 1.1. Form a national committee or unit for development of Islamic tourism and draw a national destination and industry development strategy for the development of Islamic tourism. 1.2. Carry out a market research in order to identify bottlenecks of the industry and broad directions for the destination development 1.3 Identify destinations with a potential to grow in the Islamic tourism industry with stakeholder engagements **OIC Level** 1.4 Form a working group/committee/specialized organ to set out targets for the OIC group on destination and industry development of Islamic tourism, monitor progress, and regularly report to the ICTM.	OIC GS		
2. Raising awareness on the importance and potentials of the Islamic tourism industry	**National Level** 2.1 Organize national and regional fairs for Islamic tourism service providers. 2.2 Host national, regional and international fairs in the domain of Islamic tourism. **OIC Level** 2.3. Add an additional agenda item on Islamic tourism in OIC countries into all relevant OIC events and meetings including ministerial sessions.	OIC GS		

	Activities	Responsible Body
	2.4 Provide financial and non-financial support to OIC countries to participate into regional and international events (fairs, exhibitions, roadshows, and contests) on tourism with a view to market and exhibit their products and services in Islamic tourism.	ICDT
3. Standardization and Certification	**National Level** 3.1 Prepare national standards on Islamic tourism and Halal certification. 3.2 Develop a national mechanism for auditing and rating agencies as well as standards for quality for products and services in the Islamic tourism industry. **OIC Level** 3.3 Organize expert group meeting to identify different standards practiced in OIC countries in the domain of Islamic tourism. 3.4 Harmonize different standardization and certification practices across OIC countries with a view to come up with a unique "OIC standards" that will be recognized by all member countries.	SMIIC
4. Mapping best practices and developing joint-capacity building programs	**National Level** 4.1 Establish a team/body to find out and report best-practices as well as fault lines that hinders the development the Islamic tourism industry in the country. **OIC Level** 4.2 Prepare a report that collectively presents all best practices available in OIC countries in the domain of destination and industry development.	OIC GS, IsDB (Reverse Linkage)

4.3 Organize annual events/forums on Islamic tourism for destination and industry development. 4.4 In the light of best practices, developing joint-capacity building programs for destination and industry development.		SESRIC
5. Boosting investments in the Islamic tourism industry	**National Level** 5.1 Develop financial support and/or incentive mechanisms for national Islamic tourism service providers in OIC countries to encourage investments in the Islamic tourism industry. **OIC Level** 5.2 Mobilize resources of Islamic Development Bank Group especially for investments into tourism infrastructure projects.	IsDB
	5.3 Explore the possibility of forming a tourism infrastructure development fund for OIC countries.	OIC GS
6. Easing visa policies to improve intra-OIC tourism especially in the Islamic tourism industry	**National Level** 6.1 Review visa policies practiced by OIC countries. **OIC Level** 6.2 Organize workshops and experts group meetings to find out ways to ease visa policies among OIC countries. 6.3 Explore the possibility of making special lanes in the passport control points for visitors with a valid passport from OIC member states (e.g. EU, GCC, ASEAN) in order to reduce time for passport checks.	OIC GS

Thematic Area 5 of Cooperation: Capacity Building

Objective	Activity	Coordinator	Member Institutions/ Countries	Timeline
1. Developing a capacity building strategy for developing Islamic tourism in OIC countries	**National Level** 1.1 Set up national committees for building capacities in OIC countries in the domain of Islamic tourism. These committees will be responsible of preparing a national capacity building strategy for the development of Islamic tourism. 1.2 Carry out needs assessment's analysis to identify the areas of capacity building at the national level. **OIC Level** 1.3 Organize OIC meetings and workshops to allow the representatives of national committees to discuss and come up with the OIC capacity building strategy in the domain of Islamic tourism.	OIC GS		
2. Organizing trainings and study visits to build the employees and national institutions' capacity in the domain of Islamic tourism	**National Level** 2.1 Assess the training needs and capacities at the national level in the domain of Islamic tourism through circulating questionnaires and surveys to national stakeholders. **OIC Level** 2.2 Link institutions according to the results of the training needs and capacities' assessment with a view to matching the institution that needs a selected training with the other institution that can provide it. 2.3 Plan and organize training programs to improve knowledge and skills of officials and policy makers with a view to improving the capacity of the national institutions.	SESRIC		

3. Sharing knowledge and experience of well performing countries to build the capacity of emerging countries in the domain of Islamic tourism	**National Level** 3.1 Map and review best practices of OIC countries in the domain of Islamic tourism. **OIC Level** 3.2 Organize workshops and study visits for knowledge and experience sharing. 3.3 Conduct projects to build capacities of national institutions in Islamic tourism. 3.4 Set up the Islamic tourism network for knowledge and experience exchange among OIC countries.	ICDT, SESRIC
4. Building capacity on standardization and certification	**National Level** 4.1 Establish national bodies responsible to certify hotels, food, destinations and Islamic products according to the industry requirements. **OIC Level** 4.2 Organize workshops and meetings to harmonize the Islamic tourism standards among OIC countries.	SMIIC
5. Raising awareness about the OIC Islamic heritage sites and developing relevant capacities to promote these sites	**National Level** 5.1 Mapping the cultural activities and Islamic heritage sites at the national level. 5.2 Establish guidelines for Muslim visitors that highlight the Islamic culture and the richness of the country from this perspective. 5.3 Use media and social network to raise awareness on the country's Islamic culture. **OIC Level** 5.4 Enhance cooperation among OIC countries with the aim to promote the Islamic culture and heritage sites at the OIC level such as through building up an online multilingual portal. 5.5 Organize OIC events that aim to introduce and publicize the richness of the Islamic heritage.	OIC GS, IRCICA

ORGANISATION OF ISLAMIC COOPERATION

STATISTICAL, ECONOMIC AND SOCIAL RESEARCH AND TRAINING CENTRE FOR ISLAMIC COUNTRIES