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

Travel Facilitation for Enhancing Mobility In the OIC Member Countries

COMCEC COORDINATION OFFICE
January 2015

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Executive Summary

- Visa policy liberalisation has been proven as one of the most powerful levers in travel facilitation. However, in 2014, destinations around the world request, on average, that travellers from 54% of countries obtain a visa before entering their borders. Citizens of another 3% of countries are allowed to apply for an electronic visa (eVisa), while 16% can apply for a visa on arrival. And those from 27% of countries do not require a visa when travelling for tourism purposes.

- Destination marketing is a powerful agent of travel facilitation, driving travel demand by raising interest in global traveller markets. Destination marketing serves a fragmented tourism industry with larger scale marketing campaigns that present the brand and experience of a place to potential travellers and has been proven to be effective.

- Air travel development is an increasingly vital aspect of international travel facilitation. Expanding the capacity for air travel by improving aviation infrastructure and creating new air routes between destinations plays a key role in the development of the global tourism market and is an important part of a holistic travel facilitation strategy.

- Regarding visa policy liberalization, the OIC Member Countries tend to be more restrictive than the rest of the world, despite the increasing openness of Member Countries in recent years. In 2014, OIC Member Countries require, on average, 64% of the world´s population to obtain a visa before initiating an international journey. Another 3% is allowed to apply for an eVisa while 26% is able to apply for a visa on arrival. Only 7% of the world´s population is not required to obtain a visa at all when travelling for tourism purposes.

- Visa exemptions are used by most of the OIC Member Countries but tend to affect the population of few countries. Only three OIC members employ eVisa policies – Iran, Turkey, and the UAE – though they affect more of the world´s population.

- Compared to other regional and economic blocs around the world, OIC members have relatively few (10%) reciprocally open visa policies. Instead, they often opt to unilaterally implement facilitation measures or maintain traditional visa requirements.

- Between 1995 and 2013, the total impact (including indirect and induced effects) of growth in the Travel and Tourism (T&T) sectors of all OIC Member Countries was around 14 million jobs. That is, growth in T&T sectors lead to a cumulative 64% increase in total employment across OIC Member Countries. By 2023, the total impact of forecast growth in T&T among OIC Member Countries is expected to generate 10 million new jobs for a cumulative gain of 41%.

- The total cumulative impact (including indirect and induced effects) of T&T growth on GDP among OIC Member Countries was 334% between 1995 and 2013. Over the next ten year, gains in output across OIC members from T&T expansion will accelerate. By

2023, T&T growth among OIC members are expected to experience cumulative growth of 109% in the total impact of tourism on GDP.

- Visas serve several functions. The survey made for the OIC Member Countries stated that maintaining security and controlling a nation's labour force are among the most important motivations for imposing a visa requirement on inbound travellers.

- Historical observations show that significant increases in tourist arrivals tend to follow the implementation of facilitative visa policies and processes. Case studies demonstrate that several OIC Member Countries have successfully facilitated visas through both unilateral and bilateral policy reforms in recent years.

- There is still room for improvement. The proportion of international tourists requiring a traditional visa prior to visiting an OIC destination is expected to rise slightly to 56%, on average, between 2015 and 2020 under current visa policies.

- By adopting facilitative visa policies, enhancing cooperation regarding intra-OIC travel, and effectively communicating this new openness to travellers, growth in arrivals from global markets currently requiring a traditional visa could rise significantly above current forecast over the next five years across Member Countries.

- Further, a concerted investment in destination marketing and expansion of key aviation networks are essential to the OIC travel facilitation strategy to realize the global market opportunity of greater tourism demand.

- OIC Member Countries, as a whole, would potentially gain 38 million international tourist arrivals by 2020 from improved travel facilitation, representing a 14.6% premium above baseline expectation from 2015.

- The increase in international tourist arrivals to OIC would generate up to $37 billion in additional international tourism receipts by 2020, for a gain of 14% above baseline expectation from 2015.

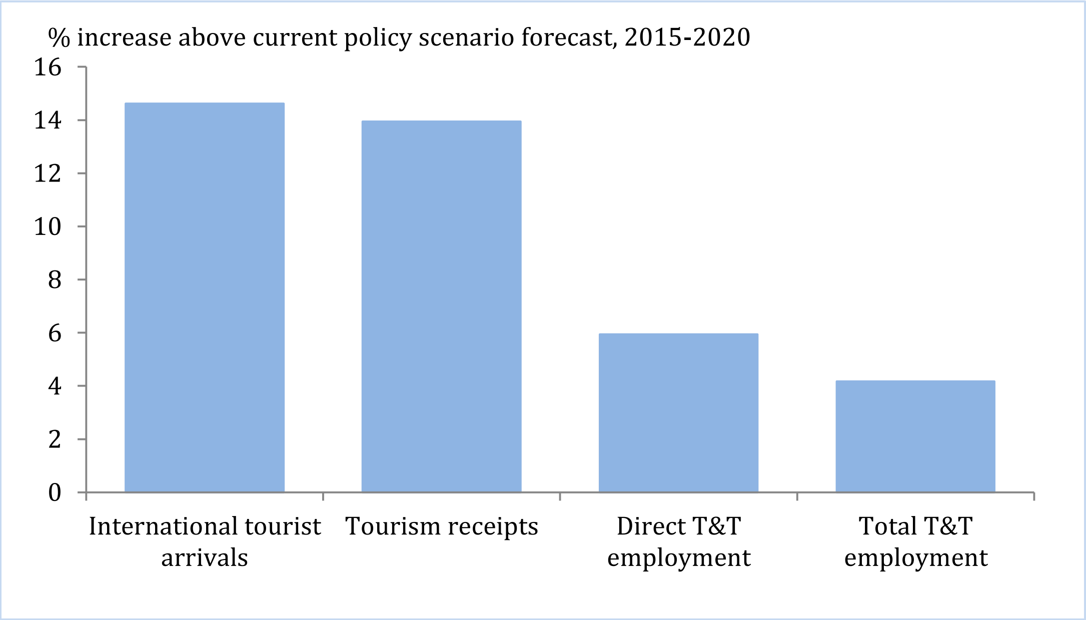
- In the OIC Member Countries, jobs directly created in the T&T sector from greater tourism receipts would approach 1.3 million by 2020, rising 5.9% over baseline expectation from 2015. Greater tourism demand would lead to an increase in total T&T employment of up to 2.1 million jobs, for a 4.2% premium over projections for current visa policies.

- To achieve these gains, OIC Member Countries should look for ways to implement the following recommendations.

- Facilitate access through improved visa policies, including better communication of visa requirements, visa application efficiencies, adoption of reciprocal visa-free policies, visa-free travel among OIC Member Countries, and/or a joint-OIC visa.

- Create new air routes and increase airline capacity.
    - Engage in well-funded and targeted destination marketing.

Figure E1: Impact of visa facilitation in the OIC Member Countries



Source: Tourism Economics

Introduction and Methodology

In order to realize all of the benefits international tourism can bring to an economy, it is necessary to promote conditions which make the host country easy to visit and attractive to develop. Travel facilitation is becoming increasingly realized as paramount for a destination to compete successfully in global travel markets. The importance of travel facilitation has been also realized by the COMCEC. The COMCEC Strategy, adopted in 2012, affirms the importance of tourism to its members while recognizing the limitations imposed by insufficient travel facilitation. It states that "Tourism depends on the easier movement of people across borders. However, across OIC member countries, travel, visa and customs procedures are lengthy, limiting and bureaucratic. Restrictive regulatory procedures constitute a severe barrier to the mobility of people."[1]

This study confirms this conclusion in detail and assesses three distinct but interlinked types of travel facilitation. These are visa policy liberalization, aviation development, and destination marketing.

Both destination marketing and aviation development are highly synergistic with visa policy improvements and can magnify the benefits of any change in policy. In a sense, these three tools act in sequence. Destination marketing builds interest in visiting a place, aviation development makes travel easier, and visa policy improvements open the destination to visitors upon arrival.

The study first reviews the functions of visas and the avenues by which travel facilitation can benefit an economy. Current visa policies of the OIC economics are explored in terms of their relative openness and reciprocity with both OIC members and key non-member countries. The importance and benefits of sound aviation policy and robust destination marketing are also explored as part of a holistic travel facilitation policy.

A series of case studies of visa policy changes from the OIC Member Countries is also presented. The potential impact of greater travel facilitation among the OIC Member Countries is then assessed. The methodology examines past benefits realized through travel facilitation and projects the potential gains of broader implementations of facilitative policies. The impact on tourist arrivals from a policy change is then applied to tourism receipts and job creation in order to address additional impacts for each country.

Lastly, recommendations of various strategies for the OIC Member Countries to achieve the potential gains from travel facilitation are described in detail.

The following methodology has been used regarding the visa scenario:

The effect of visa policy changes on international tourist arrivals is determined by a sample of case studies within the OIC. This policy effect premium[2] is estimated from the observed impacts of travel facilitation measures in these case studies.

The addressable market (the share of international tourist arrivals requiring a visa to visit a given destination) for each OIC economy is aggregated using UNWTO's global analysis of visa policies, which includes current visa policies between OIC members and key origin markets

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[1] COMCEC Strategy, page 14, 2012
[2] Annex 2: Travel Facilitation Analysis Methodology

and Tourism Economics' forecasts of international tourist arrivals by origin market. The result is used to project the size of these markets in the future.

The estimated visa policy effect premium is added to Tourism Economics' forecast of international tourist arrivals from addressable markets to determine the resulting gain in international tourist arrivals for each OIC economy and then aggregated to an OIC member country total.

These additional tourists will generate additional spending in each of the economies. International tourism receipts are calculated from the premium in tourist arrivals estimated in the prior step and Tourism Economics' forecast of average spending per tourist for each OIC economy and then aggregated to an OIC member country total.

These additional tourism receipts are spent within the travel and tourism (T&T) sector, increasing employment in the industry. The direct T&T jobs created through greater tourism spending are calculated from tourism sales per employee using WTTC's research on internal tourism consumption and direct T&T employment. The effect on total T&T employment, including indirect and induced effects, is calculated in the same manner using WTTC's research on total tourism demand and total T&T employment. The results for each OIC economy are aggregated to an OIC member country total.

In addition, a survey[3] was sent out to representatives of the Tourism Ministries of the Member Countries inquiring about current visa policies, obstacles to travel facilitation, and future plans for reform. The responses are highlighted throughout the study, providing anecdotal evidence of the trends discussed.

Given the objectives of this study and considering that there are many types of visas, the focus of the analysis in this study is on non-immigrant visas for the purpose of leisure or business (e.g. meetings, conferences, exhibitions) tourism. The study excludes work visas, residency visas, and student visas. Visitor visas issued at borders or ports of entry are also considered, as are non-visa programmes which have functions similar to those of visas, such as the Electronic System for Travel Authorization (ESTA) program in the USA.

Included as an attachment to this study[4] is a list of the OIC Member Countries analysed in this study. Due to data limitations, some of the OIC members are excluded from the visa facilitation policy analysis, though recommendations for improving travel facilitation are made for these countries at the end of the study. The excluded countries are Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Tajikistan, Palestine, Turkmenistan, and Somalia.

[3] Annex 3: COMCEC Travel Facilitation Survey
[4] Annex 1: OIC Member States

1. Travel Facilitation: Trends, Policies and Challenges

1.1. Overview

Given the magnitude of the global tourism market and continued tourism growth prospects, destinations have increasingly focused on various channels of facilitating inbound travel. An inexorable global movement toward greater travel facilitation is underway and has fuelled growth of the tourism sector around the world.

This section reviews some of the most significant trends in travel facilitation and their importance to driving further growth in the global tourism economy. Three distinct methods of travel facilitation are examined including:

- Visa policy liberalization
- Aviation development
- Destination marketing

Visa policy has been particularly effective in producing substantial increase in visitor volumes from affected visitor source markets. Destinations have employed a wide range of policy changes to facilitate travel. The greatest impacts have been observed when visa requirements are removed or an equivalent e-visa or visa on arrival is made available. The benefits of improved information, reduced wait times, and regional agreements have also been notable.

Aviation development has also been a catalyst for tourism development as increases in connectivity—both in terms of flight frequency and markets served—facilitates travel between markets.

Finally, destination marketing has been shown to facilitate travel by raising awareness and building a destination brand. This has produced measurable return on investment as destination marketing drives incremental travel.

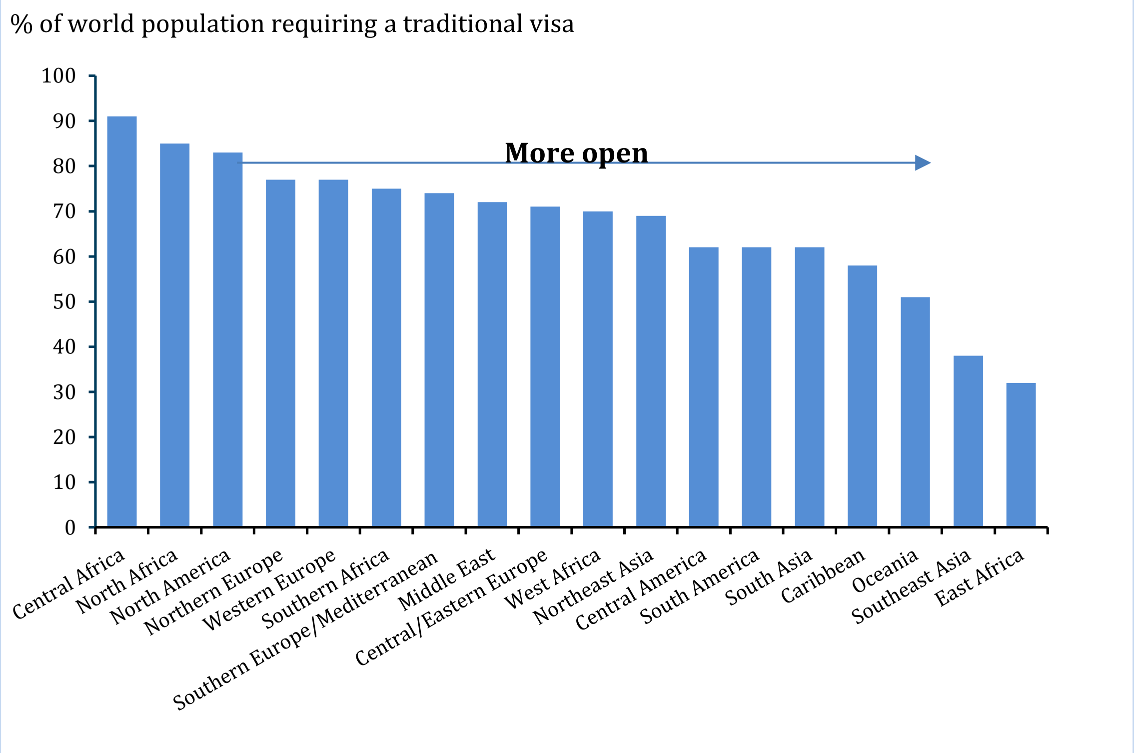
Both destination marketing and aviation development are highly synergistic with visa policy improvements and can magnify the benefits of any change in policy. In a sense, these three tools act in sequence. Destination marketing builds interest in visiting a place, aviation development makes travel easier, and visa policy improvements open the destination to visitors upon arrival. When these tools are used together, the economic dividends are compounded.

1.2. The current state of openness in the world

UNWTO research on tourism visa openness[5] indicates that the region requiring the largest percentage of the world's population (91%) to acquire traditional visas in 2013 was Central Africa. North Africa and North America followed closely with 85% and 83%, respectively. The four European sub-regions, Southern Africa, and the Middle East all required 70% or more of the world's population to obtain a visa. Access with an eVisa was most popular in South Asia, where it was offered for 11% of the world's population. The Middle East and Central Africa both offered eVisas to 7%. East Africa offered visas on arrival to the largest percentage, at 60%. And visa exemptions were most common in the Caribbean and Central America, at 39% and 31%, respectively.

Despite subsequent measures taken by regional blocs and individual countries to facilitate international travel, visa requirements still significantly influence global tourism flows. In 2014, destinations around the world request, on average, that travellers from 54% of countries obtain a visa before entering their borders. Citizens of another 3% of countries are allowed to apply for an eVisa, while 16% can apply for a visa on arrival. And those from 28% of countries do not require a visa when travelling for tourism purposes.[6]

Figure 1.1: Openness by world region in 2014



Source: UNWTO, Tourism Economics

[5] World Tourism Organization (2013), Tourism Visa Openness Report – T.20 edition, UNWTO, Madrid.
[6] IBID

1.3. Instruments of travel facilitation

1.3.1. Visa facilitation

Visa policies are some of the most important government policies influencing international tourism. The establishment of standards and procedures for visas, passports, and other travel documents is closely linked to the development of tourism. International tourism has expanded rapidly over the past six decades and, with it, the quality, reliability, and functionality of visas and other travel documents have evolved. Half a century ago, travel was heavily constrained by customs regulations, currency exchange limitations, and visa formalities. Since then, progress in travel facilitation has contributed largely to the remarkable growth of the tourism sector. The rise of multilateral agreements exempting all travellers, or certain subcategories thereof, from requiring visas has been especially influential. Despite this progress, current visa policies remain restrictive and often hinder both tourism and economic growth.

1.3.1.1. Types and functions of visas

There are several types of travel visas with varying degrees of openness. The primary categories of visas are those for residency, leisure and business visits, work, and education. The focus of this study is on visas issued to visitors for leisure and business travel. Common visitor visa types are listed below:

- Traditional visa;
    - Family or personal visit visa;
    - Official or diplomatic visit visa;
- Electronic visa (eVisa);
- Visa on arrival (VoA);
- Single-entry visa;
    - Sports or event visa;
    - Transit visa;
- Multiple-entry visa;
    - Short-term visa;
    - Cruise visa;
- Joint visa;
    - Multilateral visa agreement;
    - Visa validity region;
- Visa waiver

Visas perform several important functions for a destination country with impacts on government operations, population, and industries beyond those directly related to tourism. These functions include:

- Ensuring security;
- Controlling immigration;
- Limiting the entry, duration of stay, or activities of travellers;
- Generating revenue and applying measures of reciprocity; and

- Preserving a destination's carrying capacity by controlling tourism demand.

Despite their various functions for destination countries, visas are generally viewed by travellers as formalities which impose a cost. If the cost of obtaining a visa – either the direct monetary cost imposed by a fee or the indirect costs (e.g. distance, waiting time, complexity of the process, etc.) – exceeds a threshold, potential travellers are deterred from taking a particular trip or choose an alternative destination with less hassle. This finding is not new. In 1963, the delegates of 87 states agreed, at the United Nations Conference on International Travel & Tourism in Rome, that "Governments should extend to the maximum number of countries the practice of abolishing, through bilateral agreements or by unilateral decision, the requirement of entry visas for temporary visitors."[7]

1.3.1.2. Opportunity for visa facilitation

It has been found that improving visa processes could generate an additional $206 billion in tourism receipts and create as many as 5.1 million jobs by 2015 in the G20 economies.[8] This study is also a key resource for other published research on visa facilitation, including analysis by the European Commission[9] which identified large number of "lost" travellers for the Schengen area due to the current visa regime.

Other, more econometric-based, studies would suggest that some potentially higher impacts can be derived, with gains of up to 70% estimated under elimination of bilateral visa constraints[10]. The case study approach taken in this study, and other Tourism Economics analysis, arguably takes a closer look at the true drivers of underlying tourism demand in a counterfactual case for each instance to derive the true impact of visa facilitation.

The prior analysis, consistent with analysis by UNWTO[11] also identified five important areas of opportunity for entry visa facilitation:

- Improve the delivery of information;
- Facilitate current processes;
- Provide differentiated treatment for key market segments;
- Implement eVisa programmes;
- Establish regional agreements.

These opportunities also exist for the OIC economies and are explained below.

[7] United Nations Conference on International Travel and Tourism (1964), Recommendations on International Travel and Tourism, August 21 - September 5, 1963, Rome.
[8] UNWTO and WTTC op. cit. p2
[9] European Commission (2013), Study on the economic impact of short stay visa facilitation on the tourism industry and on the overall economies of the EU Member States being part of the Schengen Area (Online), available: http://ec.europa.eu/enterprise/sectors/tourism/files/visas_study_2013/final_report__visa_facilitation_en.pdf
[10] Robert A. Lawson and Sauray Roychoudhury (2013), Do travel visa requirements impede tourist travel (Online), available: http://oneil.cox.smu.edu/system/media/838/original/Visa_and_Travel_Paper.pdf
[11] UNWTO (2013), Visa facilitation: Stimulating economic growth and development through tourism (Online), available: http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_visa_facilitation.pdf

Improve the delivery of information

Information on entry formalities – especially the elements of great importance to travellers, such as visa requirements and procedures – should be timely, available in multiple languages, have simple instructions, and be reliably accessible via a clear and official web site.

Facilitate current processes needed to obtain visas

The requirements and processes for approving visa requests for temporary visitors, including personal interviews, official documents or certificates, and long waiting periods, often produce bottlenecks for applicants. Better use of modern information technology by service providers and the institution of visas on arrival minimize these obstacles and improve the efficiency of the application process.

Differentiate treatment to facilitate tourist travel

Facilitating the visa process for certain types of visitors – especially those seeking temporary entrance for tourism purposes – serves to increase the flow of inbound travel to a destination while preserving regulations on work, student, and residency visas. These measures may include granting visa-free entry to tourists arriving by cruise ship or chartered planes or easing visa restrictions for certain geographical regions or ports of entry.

Institute eVisa programmes

If an entry visa cannot be avoided, the use of an electronic visa (eVisa) is preferable to the traditional paper visa. An eVisa is easier to obtain and eliminates the requirement of the applicant's presence or a physical passport. eVisa programmes are especially beneficial for destinations without a widespread network of embassies or consulates.

Establish regional agreements

There are several regional agreements already in place which allow travellers from other countries to move between member countries without a visa once admitted by a participating country. A valid form of national identification from a member state may even travel between participating states – as is the case with the Schengen area in Europe. Other examples of such agreements include the ASEAN common visa, ECOWAS 90-day facilitate visa-free arrangement.

However, regional agreements require a harmonised approach towards visa procedures for travel from outside of the region. This can potentially have a detrimental impact on travel from outside the region as quantified in the European Commission study. The case of Croatia joining the EU and the Schengen area placed a more restrictive process on travellers from Russia as an example of risks in this case.[12]

1.3.2. Aviation

Air travel development is an increasingly vital aspect of travel facilitation. Expanding the capacity for air travel by improving aviation infrastructure and creating new air routes between destinations has played a key role in the development of the global tourism market. According to the UNWTO, air travel accounted for 48% of total international arrivals in 2013 –

[12] European Union (2013), Study on the economic impact of short stay visa facilitation on the tourism industry and on the overall economies of EU Member States being part of the Schengen Area (Online), available: http://ec.europa.eu/enterprise/sectors/tourism/files/visas_study_2013/final_report__visa_facilitation_en.pdf

up from just over 36% in 1995. The remainder was distributed amongst travel by rail, road, and sea.

The chief benefit of increasing a destination's airline capacity is the opportunity to expand its potential visitor market. Since the tourism industry is dependent on visitor demand, extending access to air travel to additional visitors in new markets is an effective strategy for raising potential tourism demand.

A prime example of this strategy in action is the recent expansion of Emirates Airline's service to and promotion of Dubai. Emirates Airlines (in concert with an open skies policy) was the initial catalyst to Dubai as a tourism destination, providing service between Dubai and major international markets. This then encouraged even more traffic as other airlines were able to connect to Emirates and additional airlines in Dubai.

By becoming a stopping point between points east and west, Dubai emerged as a tourism destination – primarily for shopping. Emirates also became part of the brand of Dubai, known as a premier airline with above average services. The airline also became its own marketing agent for the destination with special packages encouraging hotel stays for those connecting in Dubai, including Arabian Adventures which further increased tourism demand for Dubai.

Emirates' involvement in developing Dubai's airline infrastructure has dramatically increased the aviation sector's impact on the nation's output while expanding its potential visitor market. As of early-2013, the aviation sector was contributing over $39.47 billion to the UAE's economy, representing roughly 14.7% of the nation's GDP. It was also reported that Dubai's air passenger traffic has doubled in the last five years, and its airport is the world's third largest.[13]

Similarly, Abu Dhabi has enlisted Etihad Airlines to expand its aviation capacity alongside a coordinated destination marketing effort by its key tourism stakeholders. The Abu Dhabi Tourism Authority (ADTA) and Tourism Development and Investment Corporation (TDIC) have worked extensively since 2004 to develop the nation's tourism brand. Recently, Etihad has been enlisted to develop Abu Dhabi's aviation sector in cooperation with the Abu Dhabi Airports Company (ADAC), which has steadily built up the nation's airport capacity.

Etihad's route development provides access to the largest potential visitor markets in the US, Europe, and Asia, while generating the dual benefits of point-to-point service and connection service through Abu Dhabi. Its strategy has also incorporated partnerships with other airlines to enable more scheduled connections. Ultimately, the addition of new connections, more frequent flights, and access to new visitor markets will facilitate greater visitor demand for Abu Dhabi.

Liberalization through air service agreements (ASAs) is also a vital component of travel facilitation. These bi-lateral agreements allow airlines to operate between the two countries, define the routes carriers can operate, determine whether carriers can offer beyond services, and place limits on the frequency and capacity (seats) that carriers can operate. Broader and more liberal ASAs lead to increased air service and lower fares, which stimulate additional passenger volumes, leading to greater economic growth and employment.

[13] Gulf News (2013), Aviation contributes over Dh145b to UAE economy (Online), available: http://gulfnews.com/business/aviation/aviation-contributes-over-dh145b-to-uae-economy-1.1145662

A 2014 study titled "Developing Air Linkages to Sustain Tourism among the OIC Member States" commissioned for the 4th Meeting of the COMCEC Transport and Communications Working Group found that the rise of Turkey's flagship air carrier Turkish Airlines supported growth in average weekly seats at Istanbul Ataturk airport of close to 14% per annum between 2005 and 2014. Turkish Airlines accounts for over two-thirds of total seat capacity from Ataturk airport. By more than doubling the number of destinations served from Ataturk over the past decade, Turkey elevated the airport to one of the primary air transport hubs in the region.[14]

Air transport and travel facilitation are also related in the passenger experience once travellers are in transit. The International Air Transport Association (IATA) has developed an initiative called the Passenger Facilitation Working Group (PFWG), which brings together airlines, airports and governments to provide a "secure, seamless and efficient passenger experience"[15]. The program is addressing solutions in the following areas:

- **Passenger data:** Improving passenger information which is transferred from the Airlines to Government would reduce inefficiencies and fines due to missing or mismatching data.
- **Security Access:** Improving passenger flow at security checkpoints with existing technology and infrastructure would to reduce queue length and times.
- **Immigration:** Improving border crossing through automated border control would reduce waiting times without compromising security.

The objectives of the program are designed to benefit passengers (by reducing wait times and hassles), governments (by promoting efficiencies and security), airlines (by establishing streamlined procedures for more on-time departures), and airports (by reducing queues and making more efficient use of space and infrastructure).

The COMCEC air linkages study has confirmed the synergy between visa policies and aviation sector development. Put conversely, aviation barriers hurt tourism as they prevent potential visitors from utilizing air services – often the most direct form of transportation – to reach their destination. The study identifies visa costs and procedures as an impediment to the development of both aviation and tourism.[16]

1.3.3. Destination marketing

Destination marketing plays an important part in economic development strategy for countries around the world as they seek to increase exports generated by international tourists. It is also an integral part of a holistic travel facilitation strategy. Destination marketing generates awareness and interest among traveller markets, starting the chain of creating and facilitating travel to destinations.

The COMCEC Strategy recognizes this need among its members, noting that awareness of existing tourist attractions is limited even among the Member Countries. Ineffective marketing

[14] Developing Air Linkages to Sustain Tourism among the OIC Member States, 2014
[15] IATA Passenger Facilitation Fact Sheet,
http://www.iata.org/whatwedo/workgroups/Documents/Passenger_Facilitation.pdf
[16] Developing Air Linkages to Sustain Tourism among the OIC Member States, 2014

strategies have failed to raise awareness and improve traveller perceptions of conditions within these destinations.[17]

The case for destination marketing is broad and compelling. This section briefly outlines the rationale for destination marketing and the particular importance of this function for the travel facilitation in the OIC Member Countries.

The importance of destination marketing is connected to the characteristics of the tourism sector, the dynamics of international travel markets, and proven economic returns of effective marketing.

Destination marketing is vital because:

- The tourism sector is fragmented across various industries and is made up of smaller companies without the capacity to market globally
- Scale produces substantial marketing efficiencies which are required in global marketing campaigns
- The tourism product is strongly linked to the destination image and brand
- Competing international destinations are actively marketing and a failure to engage with travel markets results in lost market share
- The global market opportunity is vast and represents better growth prospects than domestic markets
- Destination marketing has been proven to be historically effective, producing returns in excess of investments and greater than many other sectors

Fragmentation of the tourism sector

The tourism sector faces two natural disadvantages when it comes to global marketing. The first is that tourism is not represented by a single industry. In fact, international visitors are customers to businesses across dozens of industries, including hotels, restaurants, shops, rental car companies, taxi services, museums, and theatres. As a result, a visitor to an OIC Member Country benefits multiple segments of the economy. Destination marketing represents all of these disparate businesses to the global market in a way that no single business or industry segment could.

The second is that these businesses tend to be smaller than in other sectors, such as manufacturing or finance.

A research has identified a concentration of small and medium size company employment within the arts, entertainment, & recreation and the accommodation & food services sectors. This implies that very few, if any, of these organizations would have the resources needed for concerted investments in global marketing.[18]

Given these realities, the tourism industry faces a massive challenge given the scale that international marketing requires. Collaborative destination marketing effectively deals with this challenge by representing a fragmented tourism industry as a single product to a common customer.

[17] COMCEC Strategy, page 14, 2012
[18] Oxford Economics (2014), The Return on Investment of Brand USA Marketing: 2013 Fiscal Year Analysis

The efficiencies of scale

Effective international marketing requires significant and consistent funding with the aim of gaining a sufficient "share of voice" to be heard and make an impact. While the cost of media purchases is expensive, per unit advertising costs go down as the volume of purchases goes up. Further, scale produces efficiencies that reduce overhead and maximize the share of funding that goes to actual marketing and advertising. As a result, the larger scale of collaborative destination marketing is more effective than what individual businesses could accomplish. Simply put, the whole of destination marketing is greater than what the sum of individual parts would be.

The essence of the tourism product

In the vast majority of cases, a leisure visit to a country is not motivated by a single company. In other words, the decision of an international tourist to visit a place is not typically driven by a hotel, restaurant, a single attraction, or even a single destination within the country. The entire destination, including a wide range of experiences, products, and services, is behind the decision to visit.

As a result, it is most effective to market the destination as a whole to be consistent with the customer mind-set. Marketing efforts that focus on only one segment of the tourism market, a specific hotel or attraction, will not address the core motivation for potential visitors. Destination marketing recognizes this fact. Collective marketing represents the destination as a set of diverse offerings to a single customer and, in doing so, is uniquely able to create demand for all segments of the tourism industry.

This relates to the significant importance of a destination's brand. The most successful destinations are those that develop a strong and distinct brand identity, maintain awareness among its key target markets, and provide a compelling call to action. This is only an achievable task if approached at the destination level since company-level efforts will inevitably fail to create consistent and representative brand awareness among global travellers.

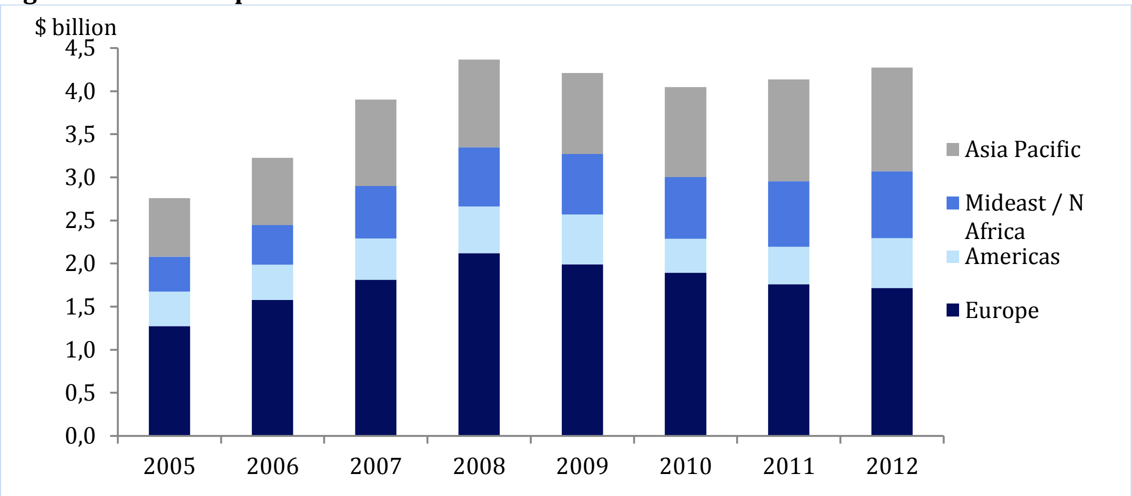
Competition demands destination marketing

Global competition for international travellers is steep with tourism offices around the world devoting significant resources to destination marketing. Oxford Economics estimates that $4.3 billion was spent on national level tourism promotion in 2012. The majority was spent by European destinations ($1.7 billion) and Asia Pacific destinations ($1.2 billion).

Nearly $1 billion was spent to promote the Middle East and North Africa region.

The absence of destination marketing can lead to a lack of competitiveness and declines in market share. Tourism Economics, Oxford's subsidiary company, works with national tourism offices around the world and regularly observes the positive effects of their tourism campaigns. Implicitly, this results in lost market share among destinations that are not investing in destination promotion.

Figure 1.2: Global Spend on National Tourism Promotion



Source: Oxford Economics

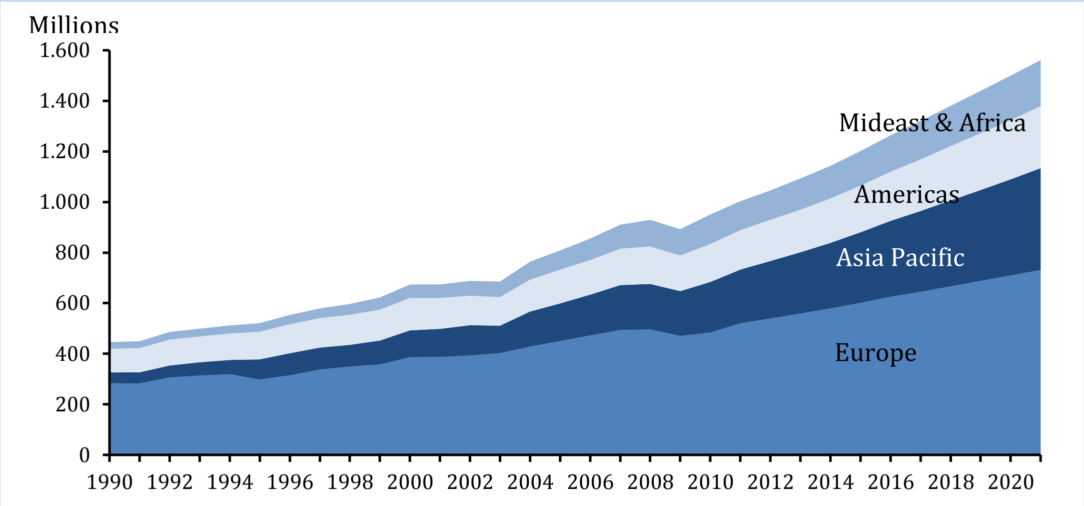
The global market opportunity

The sheer size of the global travel market also makes a compelling case for destination marketing. In 2013, international tourist arrivals reached 1.1 billion. Since 1990, growth in international travel has averaged 4% per annum and has expanded a cumulative 62% since 2000.

By 2020, the global market for international travel will reach 1.5 billion tourist arrivals as shown in Figure 1.3. This rate of global travel growth is expected to persist as the global middle class continues to expand. China alone will be home to 75 million more middle class households by 2023 as shown in Figure 1.4.

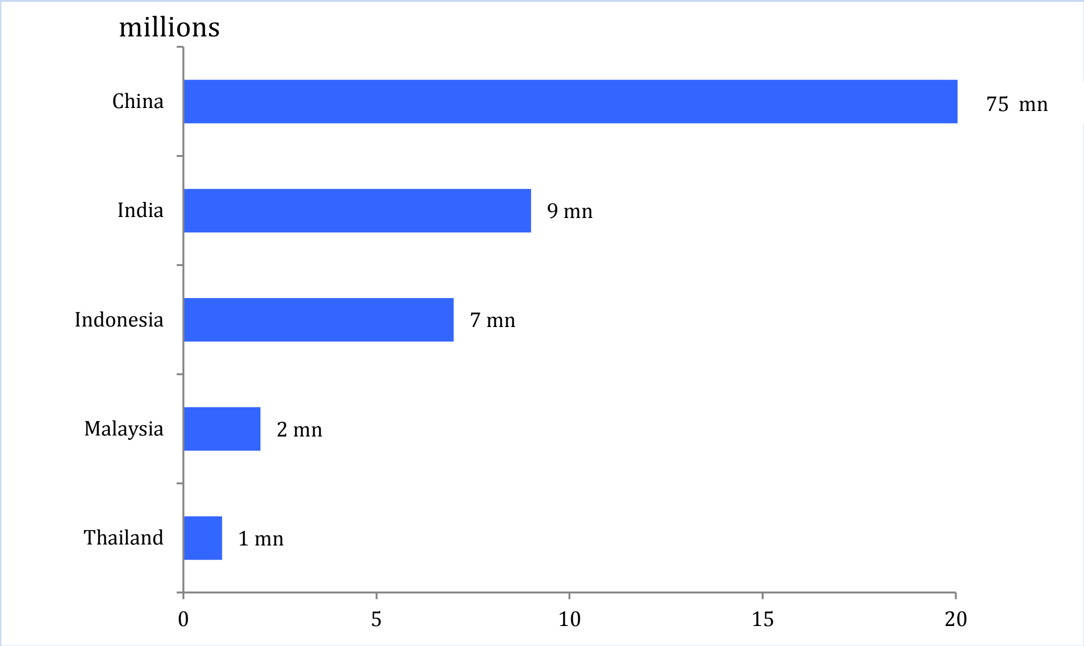
It follows that a concerted investment in destination marketing needs to be an essential part of the OIC travel facilitation strategy to realize this global market opportunity.

Figure 1.3: International tourist arrivals by region



Source: Tourism Economics

Figure 1.4: New "Middle-Class" Households 2013-2023



Source: Oxford Economics

The historic effectiveness of destination marketing

Destination marketing has been implemented effectively by many destinations. Across the globe, destinations have found investments in destination promotion yield significant returns. The return on investment (ROI) of marketing campaigns is measured as the visitor spending generated per unit of spending on the campaign. For example:

- Australia's 'A Different Light' campaign in 2005 yielded a return of $64 in visitor spending per $1 spent in marketing
- VisitBritain's FY2012/13 marketing yielded a 8:1 return in visitor spending return on investment (ROI)
- Canada calculates visitor spending returns on its investment in various markets:
  - 13:1 ROI for the UK
  - 24:1 ROI for Germany
  - 23:1 ROI for the United States. (Spring and summer campaign)
  - 35:1 ROI for domestic Canada visitor markets

The catalytic impacts of destination marketing

The analysis of the role of destination marketing has shown further impacts in generating economic activity beyond the travel sector. There are four primary channels through which destination promotion drives economic development and growth:

Channel	Impact
Building transportation networks and connecting to new markets	By supporting travel and tourism, destination promotion supports development of transportation infrastructure, helping support greater accessibility and supply logistics that are, in turn, important in attracting investment in other sectors.
Raising the destination profile	Destination promotion builds awareness, familiarity, and relationships in commercial sectors (institutional, companies, individuals) that are critical in attracting investment. Similarly, destination promotion raises the destination profile among potential new residents, supporting skilled workforce growth that is critical to economic development.
Targeted economic development through conventions and trade shows	By securing meetings, conventions and trade shows for local facilities, destination management organizations attract the very prospects that economic development organizations (EDOs) target. Not only do such visits create valuable exposure among business decision makers, they create direct opportunities for EDOs to deepen valuable connections with attendees.
Raising the quality of life	The visitor economy that is fuelled by destination promotion supports amenities and standards of living that are valued by residents and that are important in attracting investment in other sectors.

1.4. Challenges faced in travel facilitation

Destination countries face several challenges in facilitating travel for foreign visitors. These challenges vary in nature and intensity from country to country and can reduce the effectiveness of policy reforms and programs intended to improve travel procedures and boost tourism demand. While there are many potential obstacles facing destination markets, four of the most pressing are government inefficiencies, security concerns, inadequate infrastructure, and restrictive visa policy reciprocity.

Government inefficiency

Government inefficiencies can make it difficult for travellers to gain access to visas in a timely fashion, potentially disrupting travel flows. Furthermore, frequent regime changes, volatile cultural divisions – whether ethnic, religious, or socioeconomic – and lack of a consistent legislative structure exaggerate these inefficiencies. Under this environment, visa policy changes can occur frequently without a system of checks and balances in place to regulate the legislative process. Dramatic political shifts can also drastically alter visa requirements in a short period of time, increasing confusion for travellers looking to gain entry.

Security

Security is a prime concern of both travellers and host countries, and the lack thereof inhibits travel and strains the tourism sector. Traditionally, when the threat of violence is high a host government will prohibit carriers of travel visas from entering high-risk cities or regions.

Travel advisories issued by origin governments not involved in a given conflict also hamper tourism even when explicit visa policy restrictions have yet to be implemented.

Infrastructure

Infrastructure plays a key role in determining demand for a given destination. While countries with industrialized urban centres tend to have robust transportation networks, those with an abundance of rural areas are often less connected, making local travel more difficult. Without targeted investment projects to develop extensive highway or rail networks, countries falling into the latter category become less attractive to tourists. The same is true for those that feature limited global travel capacity through their primary ports of entry and unreliable or underdeveloped electrical and communications networks.

Reciprocity

Restrictive visa policy reciprocity is a major hindrance of travel to many global destinations. Often, a host government will put in place restrictive visa policies affecting a group of travellers in answer to similar policies affecting their own citizens as a form of political and economic retaliation. Regardless of their motivations, reciprocally prohibitive visa policies are disruptive to travel flows between countries, limiting the benefits of international tourism to the countries imposing them. Reciprocity can also impede aviation policy liberalisation as air service agreements require cooperation from both governments.

Available funding for destination marketing

Destination marketing is expensive as it requires significant funding commitments over a long period of time to build a brand and gain share of voice across key traveller source markets. This is often the single greatest hurdle to adequate investments in this important function.

2. Travel Facilitation in the OIC Member Countries

2.1. Global Travel Facilitation of the OIC Member Countries

The OIC Member Countries tend to be more restrictive than the rest of the world, despite the increasing openness of member states in recent years. In 2014, travellers from 59% of countries from the world (6,404 of 10,920 potential policy pairs) require a traditional visa to enter OIC destinations. eVisas are available to citizens of another 3% of countries (354 of 10,920 potential "policy pairs" which is defined as any combination of an OIC member country and another country). And those from another 27% (2,935 of 10,920 potential policy pairs) may obtain a visa on arrival in OIC Member Countries. Travellers from 11% of countries (1,164 of 10,920 potential policy pairs) may visit OIC destinations without a visa.[19]

OIC Member Countries include among the world´s most and least restrictive countries, concerning visa policies, with considerable variation in individual member states. Some countries, such as Malaysia, provide visa exemptions to citizens of most (82%) countries (160 of 195 potential policy pairs) while numerous member states, such as the Comoros Islands and Maldives, have eliminated traditional visa policies for all countries. There are also numerous members which maintain traditional visa requirements for all other countries.

Some OIC Member Countries in particular, have tremendously facilitated visa policy improvements between 2008 and 2014, allowing foreign citizens to enter their country with greater ease. Most-exemplary, Djibouti now offers visas on arrival to citizens of every country in the world, where it had previously required citizens from every country to obtain a traditional visa. The facilitation measure of abolishing traditional visa requirements for visa on arrival policies has also been used extensively by Guinea-Bissau, Mali, Togo, Mozambique, and Uganda, which have all improved visa policies for citizens of at least 80% of countries (at least 156 of 195 potential policy pairs) globally.

Adding the weight of source markets' population size provides another dimension when analysing visa policy affectedness among OIC Member Countries. In 2014, OIC Member Countries request, on average, 64% of the world´s population to obtain a visa before initiating an international journey. Another 3% is allowed to apply for an eVisa while 26% is able to apply for a visa on arrival. Only 7% of the world´s population is not required to obtain a visa at all when travelling for tourism purposes.

Table 1 provides the shares of the world population which are eligible for each of the four major types of visas, namely "No Visa" ; "Visa on Arrival"; "eVisa"; " Visa Required" by OIC destination country. The openness score of each OIC destination country toward the world population is also included.

[19] UNWTO research found 195 countries with available visa policy data, resulting in 10,920 potential policy pairs with OIC member states.

Table 1: World population affected by OIC visa policies, 2014[20]

	Openness	No visa	Visa on arrival	eVisa	Visa required[21]
OIC Average	27	7%	26%	3%	64%
OIC Members					
Afghanistan	0	0%	0%	0%	100%
Albania	22	22%	0%	0%	78%
Algeria	2	2%	0%	0%	98%
Azerbaijan	25	24%	1%	0%	75%
Bahrain	27	1%	38%	0%	62%
Bangladesh	47	3%	63%	0%	34%
Benin	7	7%	0%	0%	93%
Brunei	25	24%	1%	0%	75%
Burkina Faso	18	4%	20%	0%	76%
Cameroon	3	3%	0%	0%	97%
Chad	4	4%	0%	0%	96%
Comoros Islands	70	0%	100%	0%	0%
Côte d'Ivoire	10	10%	0%	0%	90%
Djibouti	70	0%	100%	0%	0%
Egypt	22	1%	29%	0%	70%
Gabon	1	0%	1%	0%	99%
Gambia	22	18%	6%	0%	76%
Guinea, Republic of	8	8%	0%	0%	92%
Guinea-Bissau	71	5%	95%	0%	0%
Guyana	76	20%	80%	0%	0%
Indonesia	53	7%	66%	0%	27%
Iran	37	4%	0%	66%	31%
Iraq	0	0%	0%	0%	100%
Jordan	54	4%	72%	0%	24%
Kazakhstan	5	5%	0%	0%	95%
Kuwait	12	1%	16%	0%	84%
Kyrgyzstan	32	23%	13%	0%	64%
Lebanon	39	1%	54%	0%	45%
Libya	1	1%	0%	0%	99%
Malaysia	48	48%	0%	0%	52%
Maldives	70	0%	100%	0%	0%
Mali	72	6%	94%	0%	0%
Mauritania	71	2%	98%	0%	0%
Morocco	30	30%	0%	0%	70%

[20] Scores range from 100 to 0; the higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0.
[21] Visa required means that a visa must be obtained prior to departure and is not an eVisa.

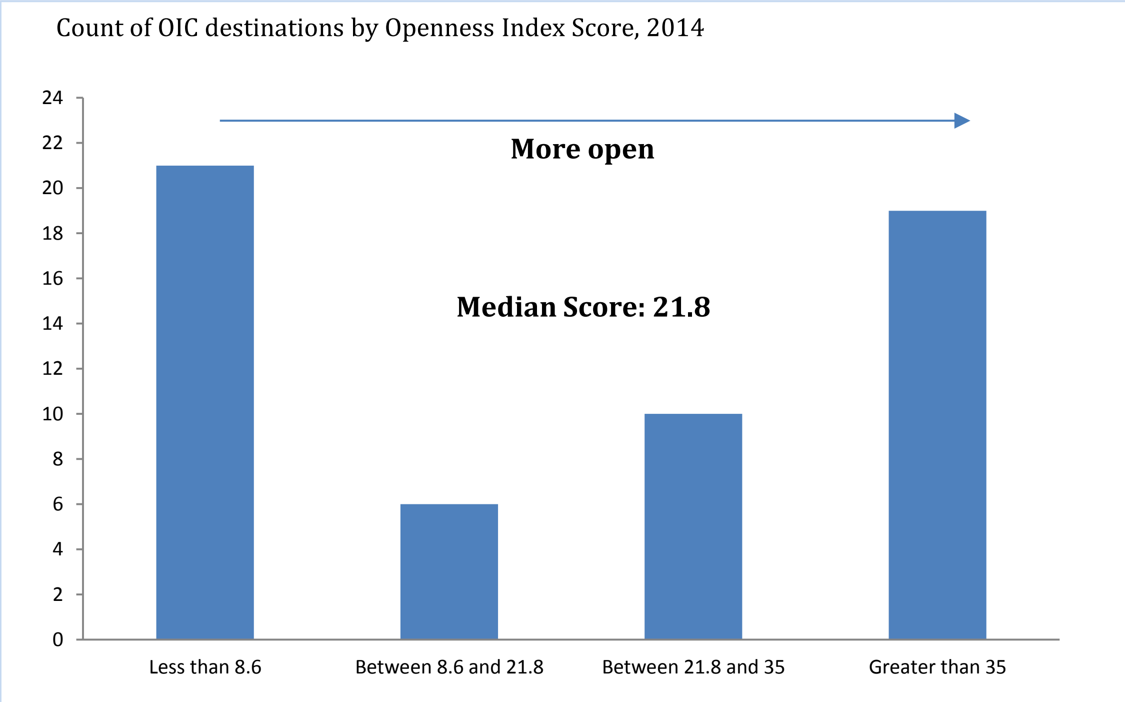
	Openness	No visa	Visa on arrival	eVisa	Visa required[21]
Mozambique	71	2%	98%	0%	0%
Niger	5	5%	0%	0%	95%
Nigeria	2	2%	0%	0%	98%
Oman	20	1%	28%	0%	72%
Pakistan	1	1%	0%	0%	99%
Qatar	12	1%	16%	0%	83%
Saudi Arabia	0	0%	0%	0%	100%
Senegal	71	4%	95%	0%	0%
Sierra Leone	5	5%	0%	0%	95%
Somalia	0	0%	0%	0%	100%
Sudan	3	2%	2%	0%	96%
Suriname	17	8%	13%	0%	79%
Syria	3	3%	0%	0%	97%
Tajikistan	42	3%	55%	0%	41%
Togo	71	5%	95%	0%	0%
Tunisia	23	22%	1%	0%	77%
Turkey	28	21%	0%	14%	65%
Turkmenistan	0	0%	0%	0%	100%
Uganda	71	4%	96%	0%	0%
United Arab Emirates	51	1%	14%	80%	5%
Uzbekistan	3	3%	0%	0%	97%
Yemen, Republic of	3	3%	0%	0%	97%

Source: UNWTO based on information of national official institutions.

Visa requirements vary greatly across OIC destinations. While five member states (Afghanistan, Iraq, Saudi Arabia, Somalia, and Turkmenistan) require the entire world´s population to obtain a traditional visa, all other members have facilitated visa requirements in some way. The facilitation measure most widely used among OIC Member Countries is visa on arrival – affecting 26% of the world population, on average – which is utilized indiscriminately by three members (Comoros, Djibouti, and Maldives) and applied to at least 75% of the world´s population by 11 others. The use of visa exemptions and eVisa is less common, at 7% and 3%, respectively. Visa exemptions are used by most OIC Member Countries but tend to affect the population of few countries. Only three OIC Member Countries employ eVisa policies – Iran, Turkey, and the UAE – though they affect more of the world´s population.

Figure 2.1 shows the distribution of OIC Member Countries by their openness index score (which is also shown in the first data column of Table 1). Twenty-one members have a score of less than 8.6, indicating relatively low openness. Only 16 members have a mid-range scope between 8.6 and 35. However, 19 OIC Member Countries show a score of greater than 35, indicating a higher degree of openness.

Figure 2.1: Openness of OIC Destinations to World Population



Source: UNWTO, Tourism Economics

Compared to 2008, visa policies in 2014 are considerably less restrictive for tourists travelling to OIC destinations. In 2008, 86% of the world´s population was affected by traditional visa policies of OIC member countries, while 8% was able to apply for a visa on arrival and 6% was fully exempt from visa requirements. The greatest improvement in visa facilitation came from OIC Member Countries abolishing traditional visa requirements (a decrease of 22 percentage points) towards source markets and replacing them with more facilitative measures, the most common of which is visa on arrival (which increased by 18 percentage points).[22]

In turn, OIC destinations have improved their openness to the world's population in the past several years. The average openness score across OIC destinations was 11 in 2008 and sits at 28 in 2014. While still low, compared with the rest of the world, the current OIC average level of openness represents a 155% increase from six years prior. Several African countries – including Djibouti, Mozambique, Uganda, Togo, Guinea-Bissau, Mali, Senegal, Mauritania, and Guyana – drastically improved their openness scores through the adoption of visa on arrival policies for a vast majority of the world's population. Each saw an increase in their openness scores greater than 62 points. In fact, most of the substantial gains in openness among OIC Member Countries involve a transition away from traditional visas to visas on arrival. Greater openness in UAE and Iran was achieved through the adoption of eVisa over less facilitative policies, whose openness scores increased by 43 points and 36 points, respectively. Meanwhile, Azerbaijan and Kyrgyzstan converted a number of traditional visa policies to visa waivers, each realizing a gain of 21 points in their openness scores.

[22] Source: UNWTO

Table 2: Change in OIC openness to world population, 2008-2014

COUNTRY	Openness 2008	Openness 2014	Change 2008-2014
Djibouti	0	70	70
Mozambique	2	71	69
Uganda	3	71	68
Togo	4	71	67
Guinea-Bissau	4	71	67
Mali	6	72	66
Senegal	6	71	65
Mauritania	6	71	64
Guyana	14	76	62
Bangladesh	2	47	45
United Arab Emirates	8	51	43
Tajikistan	4	42	38
Iran	1	37	36
Jordan	19	54	35
Lebanon	8	39	31
Indonesia	26	53	27
Kyrgyzstan	11	32	21
Azerbaijan	4	25	21
Comoros Islands	50	70	20
Maldives	50	70	20
Burkina Faso	4	18	14
Bahrain	17	27	10
Suriname	8	17	9
Turkey	23	28	5
Côte d'Ivoire	5	10	5
Qatar	8	12	5
Albania	19	22	4
Sudan	0	3	3
Syria	0	3	3
Yemen, Republic of	2	3	2
Kazakhstan	4	5	1
Gabon	0	1	1
Algeria	2	2	0
Benin	7	7	0
Cameroon	3	3	0
Sierra Leone	4	5	0
Malaysia	48	48	0
Saudi Arabia	0	0	0
Afghanistan	0	0	0
Iraq	0	0	0
Somalia	0	0	0

COUNTRY	Openness 2008	Openness 2014	Change 2008-2014
Turkmenistan	0	0	0
Pakistan	1	1	0
Uzbekistan	3	3	0
Guinea, Republic of	8	8	0
Tunisia	23	23	0
Niger	6	5	0
Nigeria	3	2	-1
Chad	5	4	-1
Morocco	33	30	-2
Libya	4	1	-3
Egypt	26	22	-5
Kuwait	18	12	-6
Gambia	29	22	-7
Brunei	33	25	-8
Oman	36	20	-16

Source: UNWTO based on information of national official institutions

2.2. Travel Facilitation among the OIC Member Countries

For source markets among the OIC Member Countries, visa policies are similarly, proportionally restrictive compared to policies for source markets globally. In 2014, 65% of OIC Member Countries' total population is required to obtain a traditional visa when travelling to other OIC Member Countries. Additionally, 21% of the OIC population is, on average, eligible for a visa on arrival – less than the proportion of the world population (26%). And 11% of the OIC population is not required to obtain any type of visa when travelling to another OIC Member Country.[23]

Table 3 provides the percentage of the aggregated population of OIC Member Countries which are eligible for each of the four major types of visas by OIC destination country. The openness score of each OIC destination country toward the aggregated OIC population is also included.

[23] UNWTO

Table 3: OIC population affected by OIC visa policies, 2014[24]

	Openness	No visa	Visa on arrival	eVisa	Visa required[25]
OIC Average	27	11%	21%	3%	65%
OIC Members					
Afghanistan	0	0%	0%	0%	100%
Albania	8	8%	0%	0%	92%
Algeria	9	9%	0%	0%	91%
Azerbaijan	12	8%	5%	0%	87%
Bahrain	7	3%	6%	0%	91%
Bangladesh	38	3%	50%	0%	47%
Benin	21	21%	0%	0%	79%
Brunei	19	18%	2%	0%	80%
Burkina Faso	23	17%	8%	0%	75%
Cameroon	12	12%	0%	0%	88%
Chad	17	17%	1%	0%	82%
Comoros Islands	70	0%	100%	0%	0%
Côte d'Ivoire	20	20%	0%	0%	80%
Djibouti	70	0%	100%	0%	0%
Egypt	9	5%	6%	0%	89%
Gabon	0	0%	0%	0%	100%
Gambia	33	33%	0%	0%	67%
Guinea, Republic of	28	28%	0%	0%	72%
Guinea-Bissau	75	18%	82%	0%	0%
Guyana	70	0%	100%	0%	0%
Indonesia	18	5%	19%	0%	76%
Iran	44	14%	0%	60%	31%
Iraq	0	0%	0%	0%	100%
Jordan	35	16%	27%	0%	57%
Kazakhstan	8	8%	0%	0%	92%
Kuwait	4	3%	2%	0%	95%
Kyrgyzstan	24	13%	16%	0%	71%
Lebanon	33	5%	40%	0%	55%
Libya	6	6%	0%	0%	94%
Malaysia	59	59%	0%	0%	41%
Maldives	70	0%	100%	0%	0%
Mali	77	24%	76%	0%	0%
Mauritania	72	7%	93%	0%	0%
Morocco	32	32%	0%	0%	68%

[24] Scores range from 100 to 0; the higher the score, the better. Openness indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa with the percentages of no visa weighted by 1, visa on arrival weighted by 0.7, eVisa by 0.5 and visa required weighted by 0.
[25] Visa required means that a visa must be obtained prior to departure and is not an eVisa.

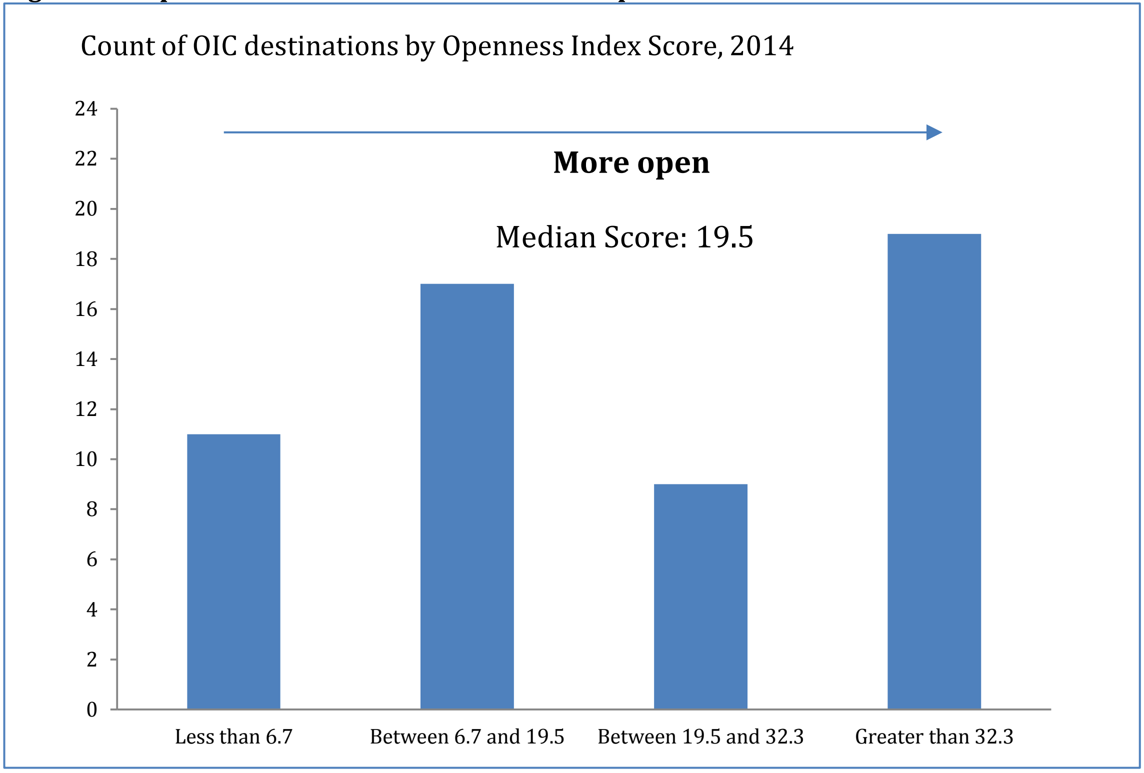
	Openness	No visa	Visa on arrival	eVisa	Visa required[25]
Mozambique	70	0%	100%	0%	0%
Niger	21	21%	0%	0%	79%
Nigeria	9	9%	0%	0%	91%
Oman	18	3%	22%	0%	75%
Pakistan	0	0%	0%	0%	100%
Qatar	7	3%	7%	0%	91%
Saudi Arabia	1	1%	0%	0%	99%
Senegal	74	18%	80%	0%	2%
Sierra Leone	18	18%	0%	0%	82%
Somalia	0	0%	0%	0%	100%
Sudan	12	7%	7%	0%	86%
Suriname	2	2%	0%	0%	98%
Syria	13	13%	0%	0%	87%
Tajikistan	33	2%	45%	0%	53%
Togo	75	18%	82%	0%	0%
Tunisia	20	20%	0%	0%	80%
Turkey	25	15%	0%	19%	66%
Turkmenistan	0	0%	0%	0%	100%
Uganda	70	1%	99%	0%	0%
United Arab Emirates	46	2%	2%	85%	11%
Uzbekistan	2	2%	0%	0%	98%
Yemen, Republic of	14	14%	0%	0%	86%

Source: UNWTO based on information of national official institutions.

Visa requirements also vary considerably among OIC destinations. Six member states (Afghanistan, Gabon, Iraq, Pakistan, Somalia, and Turkmenistan) require traditional visas of all travellers from OIC origins, and 65% of the aggregate OIC population requires a traditional visa for travel among OIC destinations. The most common facilitation measured adopted by OIC Member Countries is visa on arrival, affecting 21% of the OIC population. There are five OIC destinations (Comoros, Djibouti, Guyana, Maldives, and Mozambique) offering visas on arrival to all travellers from OIC origins. Finally, visa waivers are favoured over eVisa at 11% to 3%, with nine OIC destinations extending visa-free travel to at least 20% of the OIC population.

Figure 2.2 is similar to Figure 2.1 but focuses on intra-OIC openness. The data show the distribution of OIC Member Countries by their openness index score relative to OIC traveller markets (which is also shown in the first data column of Table 3). Eleven members have a score of less than 6.7, indicating relatively low openness. However, the greatest number of members (19) shows a score of greater than 32.3, indicating a high degree of openness.

Figure 2.2: Openness of OIC Destinations to OIC Population



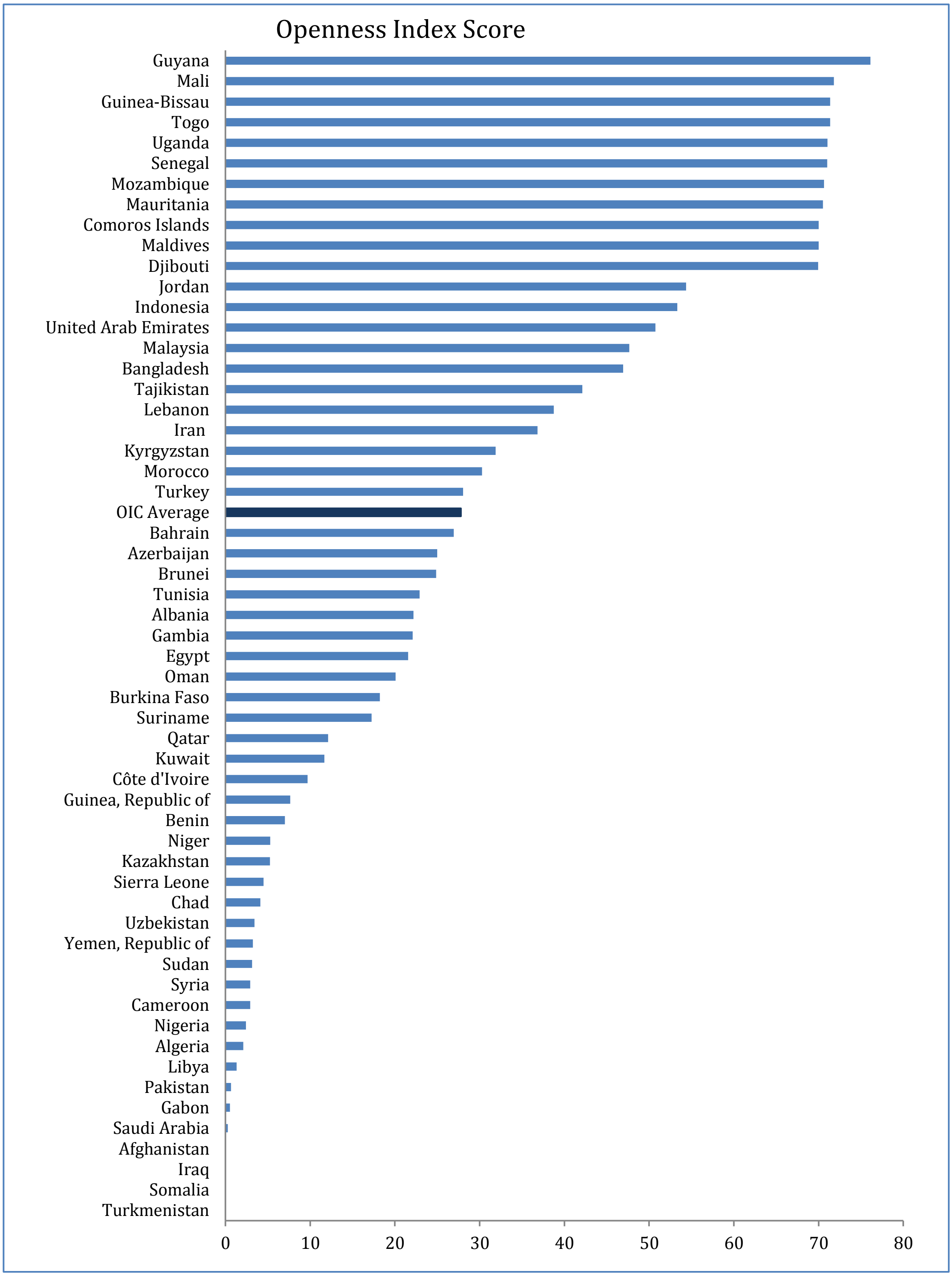
Source: UNWTO, Tourism Economics

The average openness index of OIC Member Countries is 27 towards both the world´s population and the OIC population, showing that OIC members´ visa policies are about as restrictive towards other OIC members as they are towards the world´s population. Since 2008, the implementation of more facilitative measures, particularly implementing visa on arrival policies, has occurred similarly for destinations at the global level as it has for OIC Member Countries.[26]

With reference to world population, Guyana is the most open followed by the African countries of Mali, Guinea-Bissau, Togo, Uganda, Senegal, Mozambique, and Mauritania. OIC Member Countries in Western Africa are generally the most open with the exception of Gabon and Cameroon, which rank among the least open. Several Central Asian countries of the OIC also rank as the least open, including Turkmenistan, Afghanistan, Uzbekistan, and Kazakhstan. Several Middle East countries of the OIC are also relatively closed to potential travellers, including Iraq, Saudi Arabia, and Libya.

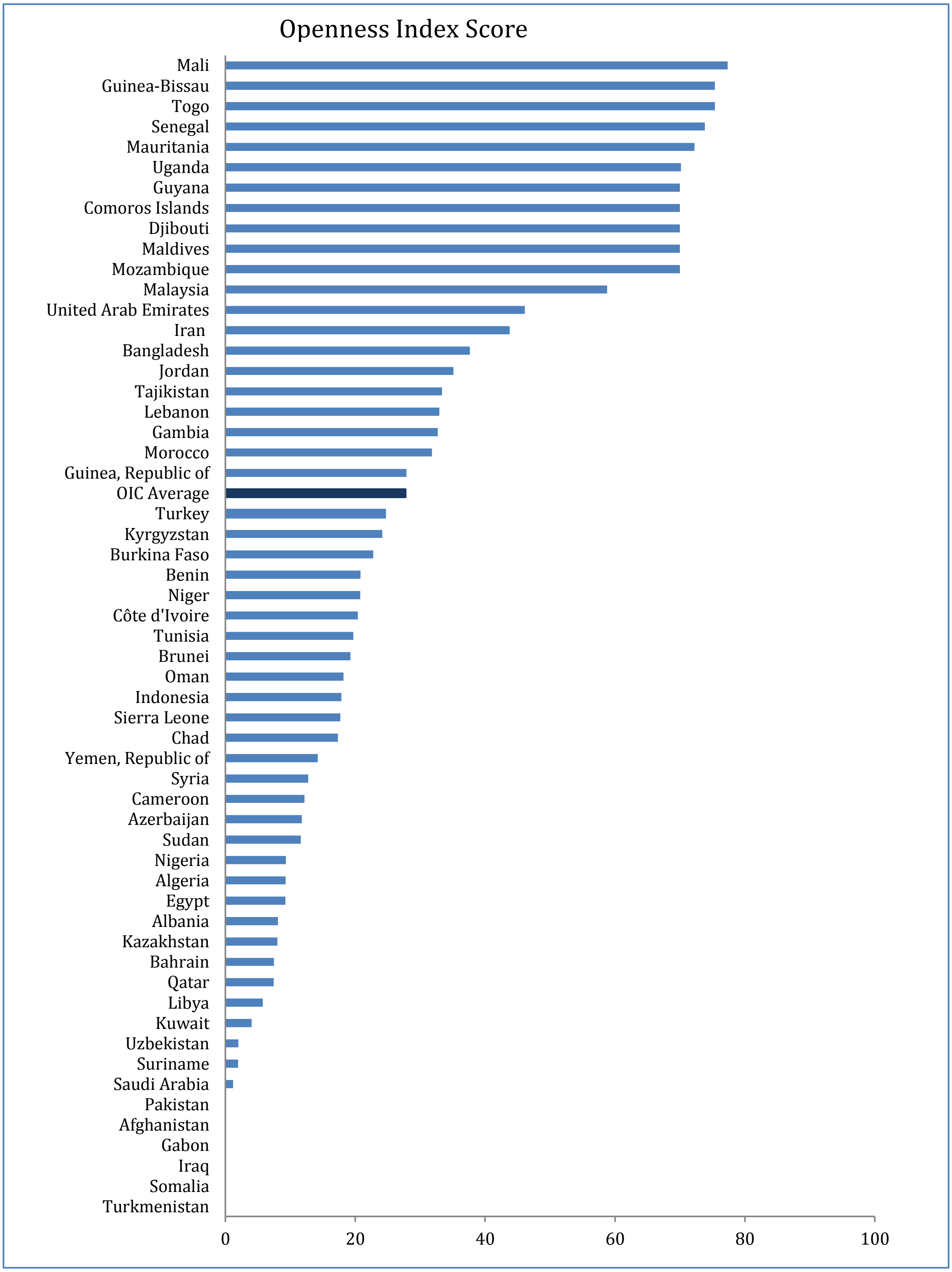
[26] Source: UNWTO

Figure 2.3: Openness of OIC Destinations to World Population



Source: UNWTO, Tourism Economics

Figure 2.4: Openness of OIC Destinations to OIC



Source: UNWTO, Tourism Economics

With reference to the population of OIC Member Countries (shown on Figure 2.4), the African countries of Mali, Guinea-Bissau, Togo, Senegal, Mauritania Uganda, Comoros Islands, and Djibouti are all in the top ten most open OIC Member Countries. Guyana, the Maldives, Malaysia, and the UAE are the most open non-African OIC Member Countries. Several Central Asian countries also rank as the least open to OIC markets, including Turkmenistan, Afghanistan, Uzbekistan, and Kazakhstan. And the Middle East countries of Iraq, Saudi Arabia, and Libya are also relatively closed to potential travellers from OIC markets.

2.3. Reciprocity

The visa requirements between two countries are known as policy pairs. In 2014, 10% of visa policy pairs within the OIC are mutually open (i.e. both the origin and destination do not require a visa of each other´s citizens). In contrast, 40% of policies reciprocally require traditional visas. Only 5% of policies are mutually visa on arrival, while the remaining 45% are non-reciprocal combinations. In terms of open reciprocity, OIC Member Countries is below the world average of 17%, with greater proportions of reciprocal visa on arrival policies than the world average (3%).[27]

Table 4 shows the distribution of all possible policy pairs between OIC Member Countries and non-OIC Member Countries. In each grouping, the count of total policy pairs is given for each reciprocal classification – for example, the total count of possible policy pairs for travel between all countries is 18,915, of which 9,891 (52%) are reciprocal. All possible non-reciprocal combinations of travel to non-OIC Member Countries from OIC Member Countries, and vice versa, are broken out separately.

Table 4: Visa facilitation reciprocity for travel between OIC Member Countries and non-OIC Member Countries, 2014

		Travel Between All Countries		Travel Between OIC Members		Travel Between non-OIC Members		Travel Between OIC Members and non-OIC Members	
Policy Pairs		**Count**	**%**	**Count**	**%**	**Count**	**%**	**Count**	**%**
Total		**18915**	**100%**	**1540**	**100%**	**9591**	**100%**	**7784**	**100%**
Reciprocal		**9891**	**52%**	**840**	**55%**	**5001**	**52%**	**4050**	**52%**
Destination	**Origin**								
No Visa	No Visa	3123	17%	149	10%	2571	27%	403	5%
Visa on Arrival	Visa on Arrival	516	3%	75	5%	183	2%	258	3%
eVisa	eVisa	13	0%	1	0%	5	0%	7	0%
Visa	Visa	6239	33%	615	40%	2242	23%	3382	43%
Not Reciprocal		**9024**	**48%**	**700**	**45%**	**4590**	**48%**	**3734**	**48%**
Destination	**Origin**								
No Visa	Visa	2324	12%	83	5%	1870	19%		
Visa on Arrival	Visa	2959	16%	479	31%	1809	19%		
eVisa	Visa	445	2%	50	3%	258	3%		
No Visa	eVisa	159	1%	8	1%	119	1%		
Visa on Arrival	eVisa	134	1%	30	2%	67	1%		
No Visa	Visa on Arrival	696	4%	50	3%	467	5%		

Source: World Tourism Organization (UNWTO) ©

[27] World Tourism Organization (2014), Tourism Visa Openness Report: Visa Facilitation as Means to Stimulate Tourism Growth, UNWTO, Madrid.

Not Reciprocal		Travel		Travel	
		To non-OIC Member	From OIC Member	To OIC Member	From non-OIC Member
Destination	Origin	Count	%	Count	%
No Visa	Visa	371	5%	265	3%
Visa on Arrival	Visa	671	9%	1739	22%
eVisa	Visa	137	2%	188	2%
No Visa	eVisa	32	0%	6	0%
Visa on Arrival	eVisa	37	0%	57	1%
No Visa	Visa on Arrival	179	2%	52	1%

Source: World Tourism Organization (UNWTO) ©

Between 2008 and 2014, the proportion of reciprocal visa exemptions among OIC destinations increased from 9% to 10% while reciprocal traditional visa requirements decreased from 72% to 40%. The proportion of reciprocal visa on arrival policies increased from 1% to 5%; however, nonreciprocal visa requirements increased from 18% to 45% of all policy pairs, showing that OIC Member Countries have frequently implemented facilitation measures unilaterally, often opting to implement visa on arrival and, at times, eVisa policies.

Compared to OIC visa reciprocity with the rest of the world, OIC Member Countries' policy pairs with their top 15 non-member outbound travel markets (listed below) are more open, facilitating travel more efficiently from these key non-OIC markets. In 2014, 42% of pairs between OIC Member Countries and key non-OIC markets reciprocally require traditional visas. Whereas, 7% are reciprocally open, 0% are reciprocally visa on arrival, and just one pair reciprocally requires eVisa. Of the non-reciprocal pairs, OIC Member Countries tend to extend more facilitative visa requirements than do their key non-OIC markets. Forty-two percent of OIC Member Countries offer some form of visa facilitation to key non-OIC markets which require traditional visas, while only 3% of key non-OIC markets offer facilitative policies to the OIC Member Countries requiring visas.

Table 5: Top 15 Non-OIC Outbound Travel Spending Markets

1-China	6-France	11-Australia
2-United States	7-Canada	12-Singapore
3-Germany	8-Belgium	13-Hong Kong, SAR
4-United Kingdom	9-Brazil	14-Netherlands
5-Russian Federation	10-Italy	15-Japan

Source: Tourism Economics

The following table shows the distribution of all possible policy pairs between OIC Member Countries and key non-OIC markets. In each grouping, the count of total policy pairs is given for each reciprocal classification – for example, the total count of possible policy pairs for travel between OIC Member Countries is 1,540, of which 840 (55%) are reciprocal. All possible non-reciprocal combinations of travel to key non-OIC markets from OIC Member Countries, and vice versa, are broken out separately.

Table 6: Visa facilitation reciprocity for travel between OIC Member Countries and key non-OIC markets, 2014

		Travel Between OIC Members		Travel Between Key non-OIC Markets		Travel Between OIC Members and Key non-OIC Members	
Policy Pairs		**Count**	**%**	**Count**	**%**	**Count**	**%**
Total		**1540**	**100%**	**105**	**100%**	**840**	**100%**
Reciprocal		**840**	**55%**	**80**	**76%**	**405**	**48%**
Destination	**Origin**						
No Visa	No Visa	149	10%	56	53%	55	7%
Visa on Arrival	Visa on Arrival	75	5%	0	0%	0	0%
eVisa	eVisa	1	0%	1	1%	1	0%
Visa	Visa	615	40%	23	22%	349	42%
Not Reciprocal		**700**	**45%**	**25**	**24%**	**435**	**52%**
Destination	**Origin**						
No Visa	Visa	83	5%	3	3%		
Visa on Arrival	Visa	479	31%	0	0%		
eVisa	Visa	50	3%	3	3%		
No Visa	eVisa	8	1%	19	18%		
Visa on Arrival	eVisa	30	2%	0	0%		
No Visa	Visa on Arrival	50	3%	0	0%		

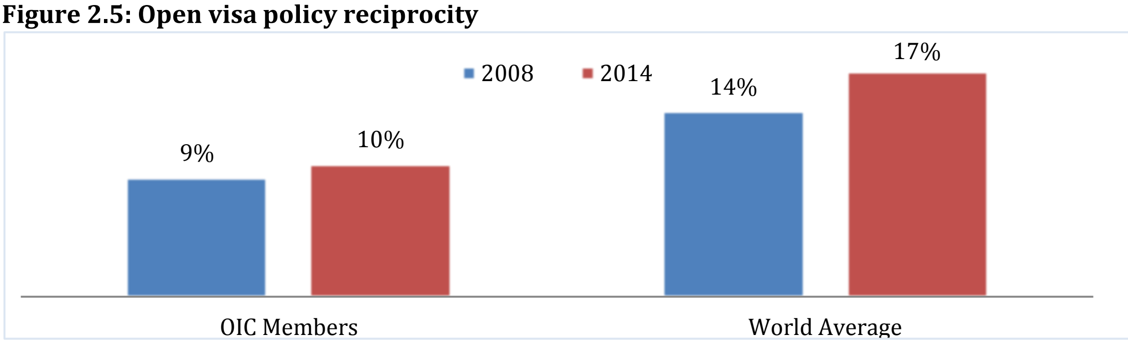
Source: World Tourism Organization (UNWTO) ©

		Travel		Travel	
Not Reciprocal		**To Key non-OIC Market**	**From OIC Member**	**To OIC Member**	**From Key non-OIC Market**
Destination	**Origin**	**Count**	**%**	**Count**	**%**
No Visa	Visa	19	2%	59	7%
Visa on Arrival	Visa	0	0%	280	33%
eVisa	Visa	10	1%	20	2%
No Visa	eVisa	0	0%	4	0%
Visa on Arrival	eVisa	0	0%	12	1%
No Visa	Visa on Arrival	31	4%	0	0%

Source: World Tourism Organization (UNWTO) ©

In 2014, the proportion of visa policy pairs that are reciprocal visa exemptions among OIC members (i.e. both countries grant each other's citizens visa-free entry) is 10% while 17% of policy pairs are reciprocally open globally. While the proportion of reciprocally open policy pairs among OIC Member Countries was 9% in 2008, 14% of policy pairs among destinations around the world were reciprocally open, showing that reciprocally open visa policies have, and continue to be, less common among the OIC Member Countries than they are among destinations globally.

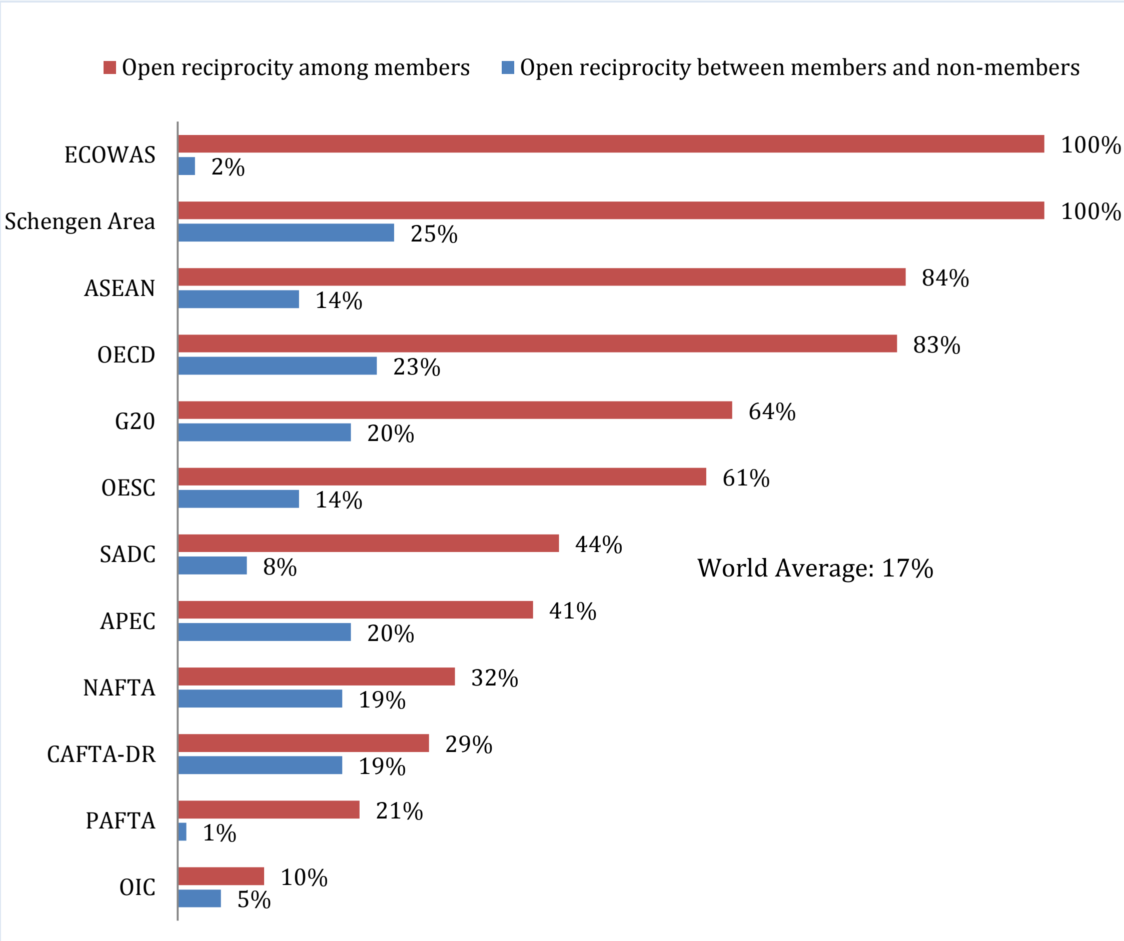
Figure 2.5: Open visa policy reciprocity



Source: World Tourism Organization (UNWTO) ©

Compared to other regional and economic blocs around the world, OIC Member Countries have relatively few (10%) reciprocally open visa policies, instead, often opting to unilaterally implement facilitation measures or maintain traditional visa requirements. The benefits of reciprocally open visa facilitation within economic and regional blocs are not limited to members but can also affect the relationship between members and non-members. With only 5% of policy pairs between OIC and non-OIC Member Countries being reciprocally open, there is still considerable room for this benefit to be realized among OIC Member Countries. [28]

Figure 2.6: Open reciprocity between members and non-members of regional and economic blocs, 2014



Source: World Tourism Organization (UNWTO) ©

[28] Open reciprocity refers to the percentage of possible policy pairs between nations which are mutually visa-free. In other words, the destination country must offer visa-free entry to nationals of the origin country and vice versa for the policy pair to be considered reciprocally open. The number of mutually visa-free policy pairs among members of a given bloc is divided by the total number of policy pairs among members of the same bloc to determine the open reciprocity percentage among bloc members. Similarly, the number of mutually visa-free policy pairs between members of a given bloc and all non-members is divided by the total number of policy pairs between members of the same bloc and all non-members to determine the open reciprocity percentage between members and non-members. Open reciprocity is relatively low for the OIC Member Countries since many OIC Member Countries do not offer one another visa free entry.

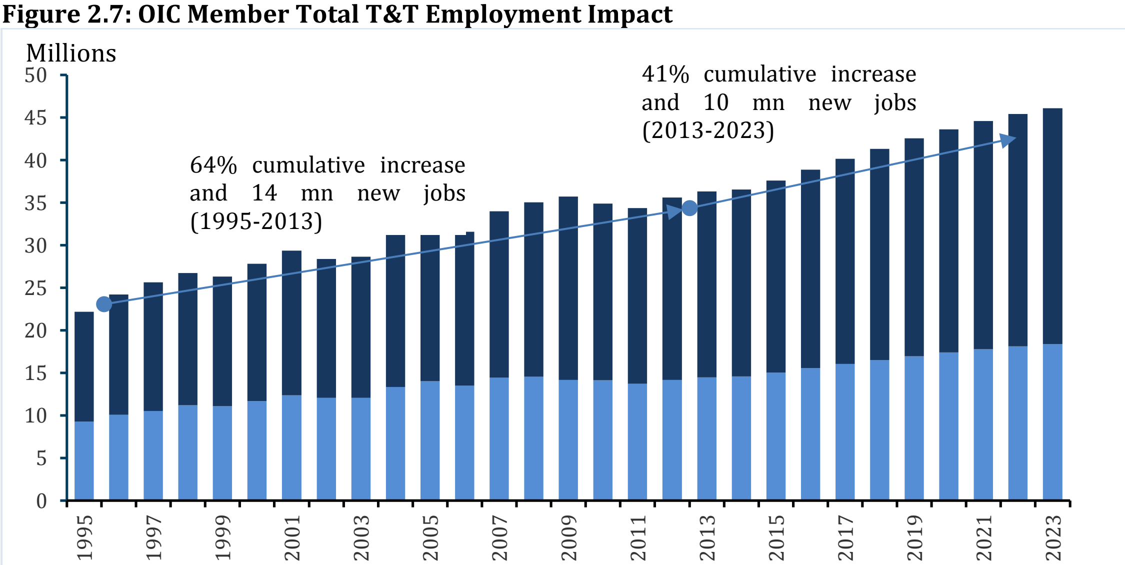
While it is generally assumed that regional and economic blocs focus on opening visa policies among member states first, their level of reciprocally open policies to non-members shows that these blocs are also driving visa facilitation measures at a global level. In the case of the Schengen Area, there is complete open reciprocity among member states, which are all advanced economies. For ECOWAS, however, complete open reciprocity is among emerging economies. The fact that both areas enjoy mutually open visa policies indicates that the level of open reciprocity is not driven by the economic differences between member states. Simply put, the lower openness among OIC Member Countries indicates a need for OIC Member Countries to prioritize the travel facilitation discussion.[29]

2.4. Economic impacts of tourism among OIC Member Countries

Increased flows of inbound travel and tourism spending to OIC members have had a profoundly positive impact on employment and output in these destinations. As demand for tourism in OIC destinations has grown so too have their respective T&T sectors, spurring job growth and generating output throughout the economies of OIC member countries. Initially, the benefits manifest in the form of increased direct T&T employment and output (by way of T&T spending), while other industries tend to benefit indirectly through additional hiring, output growth, and induced spending.

Between 1995 and 2013, the total impact (including indirect and induced effects) of growth in the T&T sectors of all OIC Member Countries was around 14 million jobs. That is, growth in T&T sectors lead to a cumulative 64% increase in total employment across OIC Member Countries. By 2023, the total impact of forecast growth in T&T among OIC Member Countries is expected to generate 10 million new jobs for a cumulative gain of 41%.

Figure 2.7: OIC Member Total T&T Employment Impact

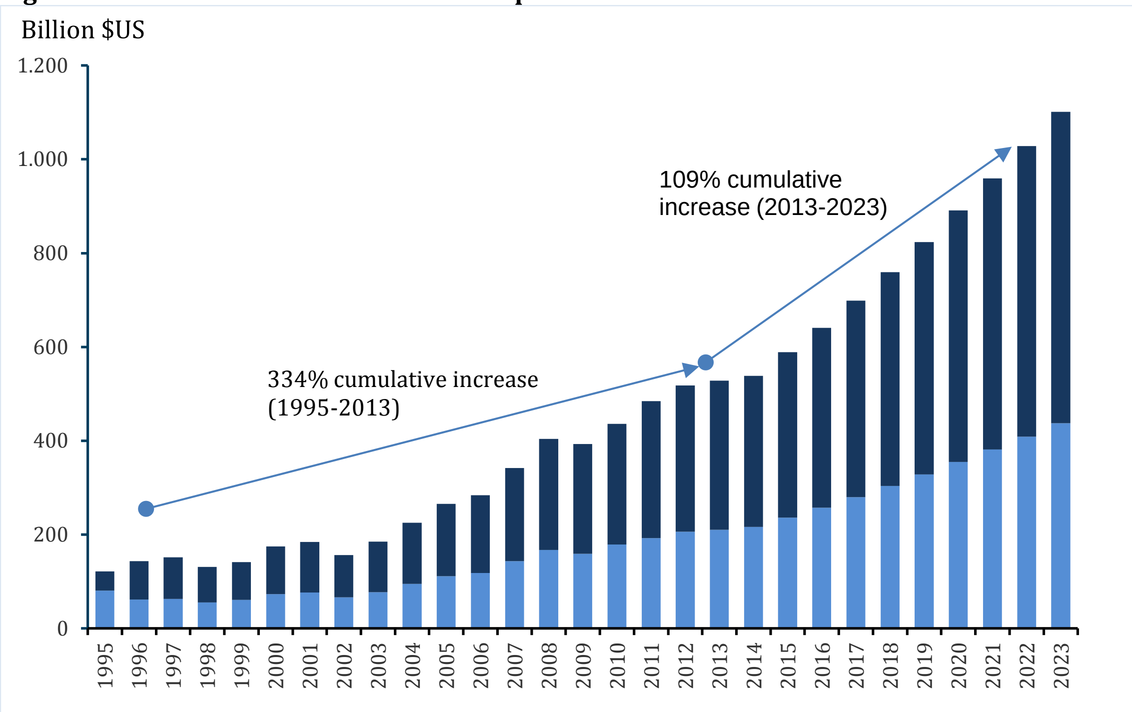


Source: Oxford Economics, WTTC

[29] UNWTO

The total cumulative impact (including indirect and induced effects) of T&T growth on GDP among OIC Member Countries was 334% between 1995 and 2013. Over the next ten year, gains in output across OIC members from T&T expansion will accelerate. By 2023, T&T growth among OIC Member Countries are expected to experience cumulative growth of 109% in the total impact of tourism on GDP.

Figure 2.8: OIC Member Total T&T GDP Impact



Source: Oxford Economics, WTTC

These projected impacts are calculated under the assumption that travel conditions among OIC Member Countries remain relatively unchanged over the forecast horizon. Given the potential benefits of travel facilitation, there is additional economic opportunity for OIC Member Countries to realize more robust gains from T&T growth in coming years.

2.5. Economic opportunity of travel facilitation

The benefits of visa reforms can be traced historically through observable increases in travel to a destination country that has implemented a reform. Conversely, declines in visitation can also be observed following the institution of more restrictive visa policies. The detailed case studies discussed in Section 3 represent a subset of nearly 30 instances analysed for this study where facilitative visa reforms were enacted and a quantifiable response in visitor activity was recorded. These analysed events have been used to extrapolate the potential impacts which could be realized by the OIC Member Countries if facilitative visa reforms were enacted.

The first step in determining the impacts of visa facilitation is to estimate the effect that visa policy changes have on tourism arrivals. This "policy effect" is informed by 30 policy changes of OIC member countries which represent facilitative visa reforms since 2008.

2.5.1. Visa policy effect

Tourism Economics developed a model to quantify the potential effects of changes in visa policy on tourist arrivals, controlling for non-visa related drivers of tourism – e.g. economic and political factors, etc. Using this research framework, it is estimated that the facilitative visa policy changes enacted between 2009 and 2014 by OIC member countries yielded an average tourist arrivals growth premium above their respective geographical regions of 5% over the five-year period.

Considerable variation in policy effects experienced by individual OIC Member Countries in the study suggests that facilitative visa reforms, while alike in principal, impact travel trends differently across destinations when put into practice. Tourism Economics posits that this variation partially stems from disparities in global competitiveness, which can be understood using the World Economic Forum's Destination Competitiveness Index. This index is implicit in the baseline tourism arrivals forecast for each OIC member country to which the 5% growth premium has been applied.

Table 7 presents the Destination Competitiveness Index score and addressable market size of each OIC Member Country as assumed in the Tourism Economics baseline forecast. In the alternative policy scenario, the potential benefit for an OIC Member Country adopting facilitative visa policies increases with a larger addressable market. Relative size of the Member's inbound travel market is also important – a destination with a relatively small market for inbound arrivals and a relatively large addressable market could still have a smaller absolute benefit of travel facilitation compared to a destination with a larger inbound travel market.

The varying degrees of global competitiveness exhibited by OIC member countries and relative size of their respective addressable markets result in a wide range of policy effect premiums realized by each OIC market over the alternative visa policy scenario. The average annual increase of international tourist arrivals from affected markets ranges from 0.7% to 15.9% for a period of five years ending in 2020. The resulting policy effects vary by country and range from 1.3% to 4.7% per annum based on the competitiveness of the destination, among other factors, assuming more facilitative policies are implemented in 2015.

Table 7: OIC Destination Comparison (5-year average, 2015-2020)

	Competitiveness Score[30]	Addressable Market[31], %
Albania	96	83
Algeria	76	85
Azerbaijan	93	64
Bahrain	105	39
Bangladesh	79	50
Benin	76	69

[30] Competitiveness index score for the years 2015-2020. The competitiveness index score of the destination is derived from the WEF Destination Competitiveness Index. A higher score represents a more competitive destination.

[31] The percent of international tourist arrivals from countries which are required to obtain a traditional visa before travel assuming current visa policies. The addressable market is averaged over 2015-2020 for presentation. A larger addressable market (%) and inbound market size (baseline arrivals) leads to a larger potential impact on arrivals from visa facilitation.

	Competitiveness Score[30]	Addressable Market[31], %
Brunei	100	41
Burkina Faso	75	28
Cameroon	82	100
Chad	65	93
Comoros	82	13
Cote D'Ivoire	79	63
Egypt	94	40
Gabon	82	100
Gambia	88	27
Guinea	71	70
Guyana	85	14
Indonesia	102	28
Iran	91	97
Iraq	99	100
Jordan	99	59
Kazakhstan	89	41
Kuwait	88	58
Kyrgyzstan	82	16
Lebanon	98	41
Libya	82	95
Malaysia	119	62
Maldives	100	20
Mali	77	11
Morocco	97	56
Mozambique	77	80
Niger	82	83
Nigeria	79	85
Oman	103	53
Pakistan	81	100
Qatar	108	30
Saudi Arabia	103	69
Senegal	86	23
Sierra Leone	68	85
Sudan	82	83
Suriname	89	22
Syria	100	72
Togo	82	33
Tunisia	82	53
Turkey	111	50
Uganda	85	71
United Arab Emirates	121	64
Uzbekistan	102	94
Yemen	76	69
OIC Average	89	59

Source: World Economic Forum, UNWTO

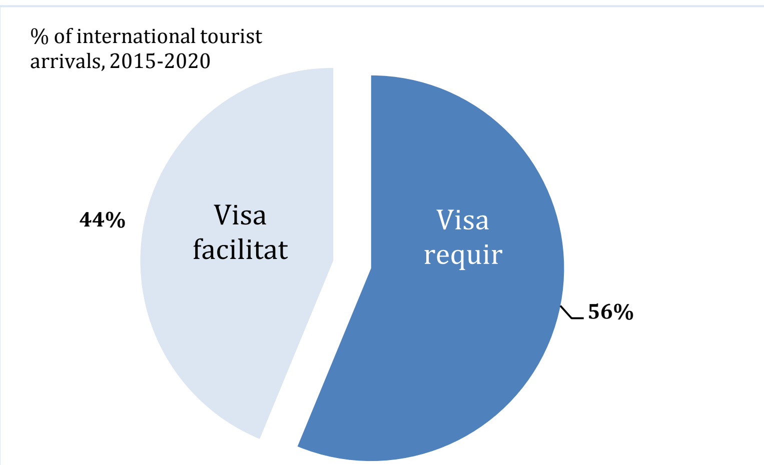
2.5.2. Tourist arrivals impact

In order to determine the potential effects of travel facilitation on tourist arrivals, the policy effect is added to the baseline forecast growth rate of the total international tourist arrivals from countries which currently require a visa to travel to a given OIC destination. Data collected by the UNWTO from various country sources on the visa requirements for each origin country in 2014 was utilized to determine whether a tourist from an origin country is permitted to enter a destination country visa-free or if they require a visa on arrival, eVisa, or traditional visa.

For the purpose of analysis, only those tourists from countries that require a traditional visa are included in the addressable market of a given OIC destination. That is, visa on arrival and eVisa eligible countries of origin are treated as "visa facilitated". Though there are modest benefits to be gained from moving to a visa-free regime from a visa on arrival or eVisa, the growth premiums seen in the alternative visa policy scenario represent only movements from "visa required" to "visa facilitated" reforms.

186 million international tourists are anticipated to visit OIC Member Countries in 2014. More than 55% of these tourists will have to obtain a traditional visa before travelling to their destination. From 2015 to 2020, the period under analysis, a cumulative sum of nearly 1.4 billion international tourists are forecast to visit destinations throughout the OIC, at an average of 230 million per year. Under current visa policies, an estimated 56% (774 million) of them would be required to obtain a traditional visa.[32]

Figure 2.9: Tourists requiring a visa to visit OIC countries



Source: UNWTO, Tourism Economics

The key assumptions of the visa policy facilitation scenario are as follows:

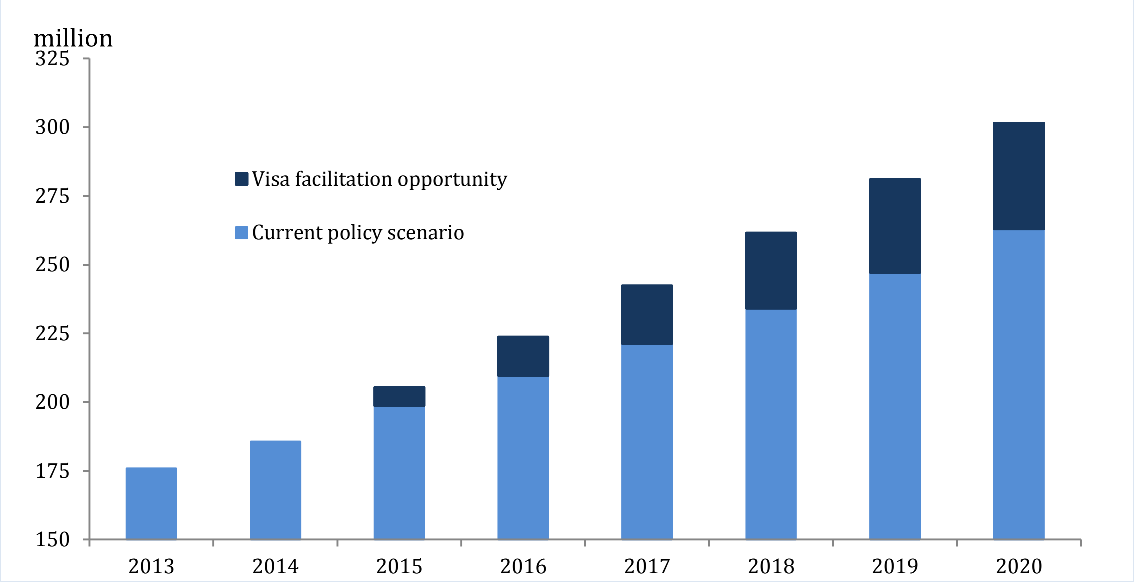
- OIC Member Countries individually enact facilitative visa policies in 2015;
- The effects of the policies begin to materialize in mid-2015;

[32] For the purpose of this analysis, arrivals from the following countries are not factored into the OIC aggregate due to the unavailability of data from their respective national sources: Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Tajikistan, Palestine, Turkmenistan, and Somalia. These exclusions result in a more conservative analysis for the benefits gained from visa policy facilitation by OIC members.

- Growth premiums on tourist arrivals, receipts, and T&T employment from the policies extend over five years to 2020;
- After 2020, growth rates in these indicators will return to baseline.

By enacting visa facilitation policies, the potential gain in international tourism arrivals to be realized by the OIC is estimated at 38 million by 2020. This represents a 14.6% increase in arrivals of international tourists above the baseline forecast under current visa policies.

Figure 2.10: OIC International tourist arrivals



Source: UNWTO, Tourism Economics

International tourist arrivals growth varies considerably from country-to-country. The two factors which most affect the variation are the relative size of the addressable market and the destination's competitiveness. A smaller addressable market, in relative terms, limits the potential for additional tourist arrivals to be attracted through visa facilitation. Moreover, the more competitive the destination is, the larger the potential gains, all else being equal. By this notion, there are actions beyond visa facilitation which a destination can take to attract additional tourists – among them are tourism investments and non-visa facilitation programs.

Table 8 provides a comparison of the international tourist arrivals forecast for each OIC destination country under the baseline and policy scenarios. In the policy scenario, it is assumed that each OIC destination country facilitates travel for its entire addressable market in 2015 and that the resulting increase in arrivals takes place over a five year forecast horizon. The premium in arrivals in the policy scenario relative to the baseline is also given as a percentage increase.

Table 8: International tourist arrivals forecast, 2020

	Addressable market (%)[33]	Arrivals, (000)		% above baseline
		Baseline [34]	Policy Scenario[35]	Policy Scenario[36]
Albania	83	3.592	4.378	21,9
Algeria	85	2.869	3.536	23,2
Azerbaijan	64	2.808	3.272	16,6
Bahrain	39	5.846	6.442	10,2
Bangladesh	50	523	594	13,5
Benin	69	319	377	18,1
Brunei	41	338	375	10,8
Burkina Faso	28	327	350	7,0
Cameroon	100	79	100	26,5
Chad	93	82	103	25,3
Comoros	13	28	29	3,5
Cote D'Ivoire	63	512	596	16,5
Egypt	40	10.806	11.961	10,7
Gabon	100	696	881	26,4
Gambia	27	183	196	7,2
Guinea	70	138	164	18,7
Guyana	14	203	211	4,0
Indonesia	28	13.460	14.418	7,1
Iran	97	5.013	6.366	27,0
Iraq	100	3.655	4.528	23,9
Jordan	59	5.612	6.487	15,6
Kazakhstan	41	6.682	7.467	11,8
Kuwait	58	371	429	15,6
Kyrgyzstan	16	4.395	4.579	4,2
Lebanon	41	1.585	1.764	11,3
Libya	95	113	141	25,5
Malaysia	62	41.625	48.211	15,8
Maldives	20	1.120	1.181	5,5
Mali	11	134	138	2,8
Morocco	56	13.625	15.570	14,3
Mozambique	80	2.692	3.267	21,4
Niger	83	102	125	22,0
Nigeria	85	1.328	1.615	21,6
Oman	53	2.287	2.606	14,0
Pakistan	100	1.379	1.738	26,0
Qatar	30	3.550	3.832	8,0
Saudi Arabia	69	17.514	20.712	18,3
Senegal	23	1.342	1.429	6,5
Sierra Leone	85	64	79	22,7
Sudan	83	863	1.052	21,9
Suriname	22	295	312	5,7

[33] The percent of international tourist arrivals from countries which are required to obtain a traditional visa before travel assuming current visa policies. The addressable market is averaged over 2015-2020 for presentation. A larger addressable market (%) and inbound market size (baseline arrivals) leads to a larger potential impact on arrivals from visa facilitation.
[34] Tourism Economics' forecast of international tourist arrivals assuming current visa policies.
[35] The visa policy scenario of potential international tourist arrivals resulting from visa facilitation.
[36] The % increase in international tourist arrivals in 2020 for the visa facilitation scenario above the baseline forecast under current visa policies.

	Addressable market (%)[33]	Arrivals, (000) Baseline [34]	Policy Scenario[35]	% above baseline Policy Scenario[36]
Syria	72	3.737	4.412	18,1
Togo	33	393	427	8,8
Tunisia	53	8.057	9.176	13,9
Turkey	50	58.738	66.445	13,1
Uganda	71	1.675	1.986	18,6
United Arab Emirates	64	29.328	33.869	15,5
Uzbekistan	94	1.472	1.821	23,7
Yemen	69	1.474	1.741	18,1
OIC	**56**	**263.030**	**301.488**	**14,6**

Source: UNWTO, Tourism Economics

2.5.3. Tourism receipts impact

The resulting increase in tourism expenditures from visa facilitation is the product of the increased international tourist arrivals and the average spending per tourist derived from the Tourism Economics forecast of international arrivals and receipts in each OIC market. By this calculation, the projected 38 million additional tourist arrivals between 2015 and 2020 would generate an estimated $37 billion in additional international tourism receipts in the OIC Member Countries. International tourism receipts would rise by 14% above the $265 billion forecast for 2020 under current OIC Member Countries' visa policies.

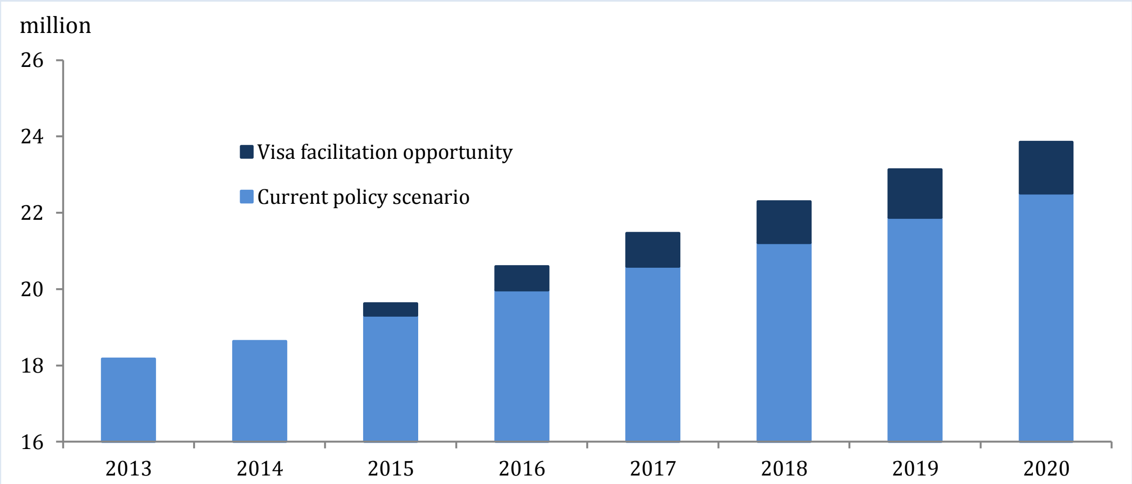
Figure 2.11: OIC international tourism receipts

Source: UNWTO, Tourism Economics

2.5.4. Employment impact

Tourism spending, in turn, fuels job creation in the T&T sector. The spending of additional tourists resulting from visa facilitation in the OIC directly supports jobs in tourism industries – which include hotels, restaurants, retail stores, transportation, entertainment and recreation. Direct T&T jobs are calculated from tourist receipts using WTTC research on internal tourism consumption and direct T&T employment for each OIC economy. Total tourism sales per employee is calculated as the ratio of internal tourism consumption to direct T&T employment. Dividing the additional tourism receipts generated by visa facilitation from the direct tourism sales per employee yields the estimated impact on direct T&T employment. Additional visitor spending stemming from visa facilitation measures by OIC Member Countries would create 1.3 million additional jobs directly in tourism sectors of member economies by 2020.

Figure 2.12: OIC direct travel & tourism employment

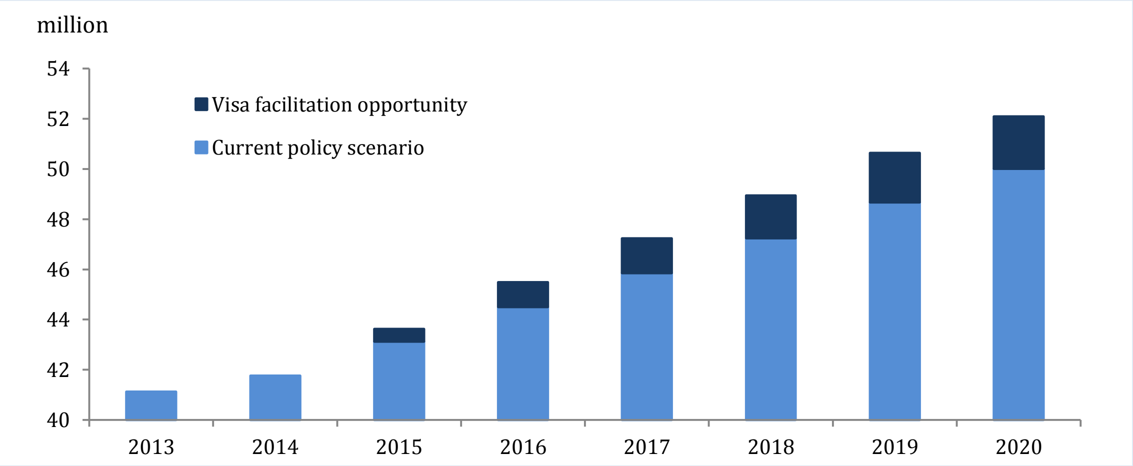


Source: UNWTO, Tourism Economics

The impacts on employment are not solely limited to tourism industries. Indirect jobs are created throughout the supply chain of tourism industries, and induced jobs are generated as employees spend their incomes in other sectors of the economy. The total T&T employment impacts are derived from WTTC research on total tourism demand and total T&T employment in each OIC market. Total tourism sales per employee is derived from the ratio of total tourism demand to total T&T employment. The increased tourism receipts are divided by the total tourism sales per employee for each economy to calculate the total T&T employment impact of visa facilitation.

Total job creation (including indirect and induced impacts) from additional tourism spending in the OIC Member Countries would approach 2.1 million jobs by 2020.

Figure 2.13: OIC travel & tourism employment



Source: UNWTO, Tourism Economics

To sum up, tables 9 and 10 present the net facilitation impacts for the OIC Member Countries. The net impacts represent additions above the Tourism Economics baseline forecast. The main driver of the differences across countries is international tourist arrivals which are driven by the relative size of the addressable market and the destination competitiveness for each country. Tourism receipts are also differentiated across markets and depend on the average spending per tourist in each country. The employment impact (both direct and total) varies based on the sales per employee in each economy.

The analysis and results presented here assume that visa policy reforms are made independently on a destination basis. The individual gains realized in each economy would likely be smaller if all OIC Member Countries moved together in reference to the same origin markets.

Table 9: Net visa facilitation impacts for OIC countries, 2020[37]

Country	Addressable market [38] %	Visa Policy Scenario International tourist arrivals '000	International tourism receipts $ mn	Direct T&T Employment '000	Total T&T Employment '000
Albania	83	786	486	9,9	27,0
Algeria	85	667	108	3,0	4,2
Azerbaijan	64	465	631	7,5	20,8
Bahrain	39	595	281	2,9	5,6
Bangladesh	50	71	27	4,6	7,9
Benin	69	58	62	6,0	10,5
Brunei	41	36	62	0,3	0,7
Burkina Faso	28	23	13	1,9	3,5
Cameroon	100	21	3	0,5	0,9
Chad	93	21	28	1,4	2,7
Comoros	13	1	1	0,1	0,2
Cote D'Ivoire	63	85	66	3,4	7,5
Egypt	40	1.155	1.238	54,1	77,3
Gabon	100	184	4	0,0	0,1
Gambia	27	13	13	2,5	4,3
Guinea	70	26	0	0,1	0,1
Guyana	14	8	4	0,1	0,2
Indonesia	28	958	1.498	56,3	100,4
Iran	97	1.353	1.054	26,6	49,2
Iraq	100	873	648	481,2	615,6
Jordan	59	875	1.190	11,0	31,8
Kazakhstan	41	785	303	4,2	6,7
Kuwait	58	58	104	0,7	1,2
Kyrgyzstan	16	183	39	0,9	6,8
Lebanon	41	179	1.161	10,8	23,7
Libya	95	29	34	0,5	0,6
Malaysia	62	6.585	6.301	100,9	167,6
Maldives	20	61	200	4,1	7,2

[37] The level difference between the visa facilitation scenario and Tourism Economics' baseline forecast assuming current visa policies in the year 2020.
[38] Addressable market measured as average over 2015-2020. The addressable market is the percent of international tourist arrivals from countries which are required to obtain a visa before travel.

Country	Addressable market [38] %	Visa Policy Scenario International tourist arrivals '000	International tourism receipts $ mn	Direct T&T Employment '000	Total T&T Employment '000
Mali	11	4	7	0,5	1,0
Morocco	56	1.945	2.238	108,5	157,7
Mozambique	80	575	103	21,2	39,1
Niger	83	22	34	1,8	3,5
Nigeria	85	287	224	14,9	26,1
Oman	53	319	390	3,4	4,8
Pakistan	100	359	466	41,8	69,3
Qatar	30	283	917	1,7	4,1
Saudi Arabia	69	3.199	2.703	18,6	27,5
Senegal	23	87	64	4,9	9,1
Sierra Leone	85	15	16	1,7	3,0
Sudan	83	189	289	19,4	37,4
Suriname	22	17	7	0,1	0,1
Syria	72	675	391	28,8	55,1
Togo	33	35	17	1,6	3,0
Tunisia	53	1.119	577	19,8	27,9
Turkey	50	7.707	6.906	53,2	129,1
Uganda	71	311	354	31,3	52,0
United Arab Emirates	64	4.541	5.380	39,7	62,8
Uzbekistan	94	349	68	6,1	10,9
Yemen	69	267	248	11,9	24,5
OIC	56	38.458	36.958	1.337,5	2.085,5

Source: Tourism Economics

Table 10: % above baseline forecast under current visa policies, 2020[39]

Country	**Visa Policy Scenario International tourist arrivals**	**International tourism receipts**	**Direct T&T Employment**	**Total T&T Employment**
Albania	21,9	21,9	18,6	14,2
Algeria	23,2	23,2	0,6	0,5
Azerbaijan	16,6	16,6	8,1	6,1
Bahrain	10,2	10,2	7,0	5,3
Bangladesh	13,5	13,5	0,3	0,2
Benin	18,1	18,1	10,9	7,5
Brunei	10,8	10,7	5,0	4,0
Burkina Faso	7,0	7,0	2,9	2,2
Cameroon	26,5	26,5	3,2	2,4
Chad	25,3	25,3	6,3	3,2
Comoros	3,5	3,5	1,8	1,3
Cote D'Ivoire	16,5	16,5	2,5	2,8
Egypt	10,7	10,7	3,5	2,3
Gabon	26,4	25,2	0,6	0,4
Gambia	7,2	7,2	5,1	3,2

[39] The percentage difference between the visa facilitation scenario and Tourism Economics' baseline forecast assuming current visa policies in the year 2020.

Country	Visa Policy Scenario International tourist arrivals	International tourism receipts	Direct T&T Employment	Total T&T Employment
Guinea	18,7	18,7	0,1	0,1
Guyana	4,0	4,0	1,4	1,1
Indonesia	7,1	7,1	1,7	1,0
Iran	27,0	27,0	3,5	2,4
Iraq	23,9	23,9	9,2	9,8
Jordan	15,6	15,6	13,8	9,8
Kazakhstan	11,8	11,7	2,4	1,5
Kuwait	15,6	15,4	1,3	1,0
Kyrgyzstan	4,2	4,2	2,9	7,9
Lebanon	11,3	11,3	9,1	7,2
Libya	25,5	25,3	0,7	0,4
Malaysia	15,8	15,8	9,1	7,2
Maldives	5,5	5,5	5,3	4,9
Mali	2,8	2,8	0,7	0,5
Morocco	14,3	14,3	10,2	6,9
Mozambique	21,4	21,3	6,9	4,8
Niger	22,0	22,0	10,2	7,3
Nigeria	21,6	21,5	1,5	1,2
Oman	14,0	14,0	6,4	4,8
Pakistan	26,0	26,0	2,4	1,6
Qatar	8,0	8,0	6,1	4,2
Saudi Arabia	18,3	18,3	7,5	4,8
Senegal	6,5	6,5	3,1	2,5
Sierra Leone	22,7	22,7	4,9	3,4
Sudan	21,9	21,9	7,3	5,4
Suriname	5,7	5,7	3,4	3,2
Syria	18,1	18,1	11,4	8,4
Togo	8,8	8,8	5,8	4,7
Tunisia	13,9	13,9	7,8	5,4
Turkey	13,1	13,1	6,8	4,7
Uganda	18,6	18,6	13,0	8,6
United Arab Emirates	15,5	15,5	11,6	11,0
Uzbekistan	23,7	23,7	4,4	2,3
Yemen	18,1	18,1	6,8	5,2
OIC	**14,6**	**14,0**	**5,9**	**4,2**

Source: Tourism Economics

2.6. Challenges faced by the OIC Member Countries

A survey of representatives from several OIC member countries revealed that maintaining security and controlling a nation's labor force are among the most important motivations for imposing a visa requirement on inbound travellers. Regulating immigration, generating revenue, and achieving reciprocity with other countries were also reported as important factors in determining OIC Member Countries' visa policies. Member Countries face several challenges to achieving these goals through travel facilitation.

Weak global competitiveness is a primary factor. The World Economic Forum (WEF) publishes a Global Competitiveness Index (GCI) which compares a "set of institutions, policies, and factors that determine the level of productivity of a country."[40] The GCI is comprised of 12 pillars on which each country is scored on a scale of 1 to 7 (7 being the highest). As of the WEF's 2014-2015 update, the OIC scored lower on every pillar than the world average. Of particular relevance to the OIC's weaker tourism competitiveness, are its low scores in the "Government efficiency", "Security", and "Infrastructure" categories.

Table 11: Global Competitiveness Index (GCI)

GCI Pillars[41], 2014-2015	World	OIC**[42]
Global Competitiveness Index	**4,21**	**3,89**
1st Pillar: Institutions	3,98	3,71
1. Property rights	4,08	3,70
2. Ethics and corruption	3,58	3,27
3. Undue influence	3,54	3,27
4. Government efficiency	3,57	3,51
5. Security	4,62	4,30
2nd Pillar: Infrastructure	4,00	3,41
3rd Pillar: Macroeconomic environment	4,76	4,71
4th Pillar: Health and primary education	5,48	4,90
5th Pillar: Higher education and training	4,20	3,61
6th Pillar: Goods market efficiency	4,35	4,18
7th Pillar: Labor market efficiency	4,19	4,00
8th Pillar: Financial market development	4,02	3,68
9th Pillar: Technological readiness	3,96	3,31
10th Pillar: Market size	3,79	3,56
11th Pillar: Business sophistication	4,06	3,78
12th Pillar: Innovation	3,45	3,08

Source: World Economic Forum, Tourism Economics

Government inefficiencies can lead to frequent changes in visa policies and inconsistent communication of visa requirements to travellers, as well as delays in visa approval periods. The length of visa approval processes was flagged by survey respondents as an inhibiting factor for group travel to OIC destinations, particularly for business purposes. Forcing travellers to apply for a visa in advance of a journey, rather than on arrival was also cited as an inhibiting factor for inbound tourism.

Concerns over domestic and international security involving a number of OIC Member Countries present a major obstacle to international travel to these destinations. Survey respondents explained that, in some cases, security concerns have made it difficult for tourists to complete the in-person requirements of visa applications.

[40] World Economic Forum (2014), Methodology: The 12 pillars of competitiveness (Online), available: http://reports.weforum.org/global-competitiveness-report-2014-2015/view/methodology/

[41] GCI Pillars scored from 1-7 (7 being the highest)

[42] OIC Average excludes Sudan, Benin, Guinea-Bissau, Niger, Togo, Comoros, Djibouti, Somalia, Brunei, Afghanistan, Maldives, Turkmenistan, Uzbekistan, Iraq, and Syria

Poor infrastructure can manifest in the form of poorly maintained transportation, utilities, and telecommunications networks – all of which reduce the quality and reliability of travel and accommodations for visitors. The geographical characteristics and lack of investment in some OIC Member Countries have precluded the development of critical infrastructure networks on which tourists rely while visiting a destination. While some OIC Member Countries are relatively small in size with a number of highly developed urban tourist centres, several others feature less industrialized cities and rural destinations separated by vast swaths of desert. Without targeted investment in transportation infrastructure, those destinations falling in the latter category become less desirable to potential tourists, weakening inbound travel flows.

Another primary factor is the tendency of OIC Member Countries to implement more restrictive visa requirements relative to members of other regional and economic blocs, often as reciprocal responses to the policies of origin countries. The OIC has cited Islamophobia – "a contemporary form of racism and xenophobia motivated by unfounded fear, mistrust and hatred of Muslims and Islam"[43] – as a primary motive for restrictive visa policies discriminatorily imposed by some Western nations on citizens of OIC Member Countries. Survey respondents highlighted the difficulty for some nationalities to obtain tourist visas due to reciprocally restrictive policies as a challenge that has limited inbound tourism.

[43] Organization of Islamic Cooperation (2014), Seventh OIC Observatory Report on Islamophobia, OIC, Jeddah.

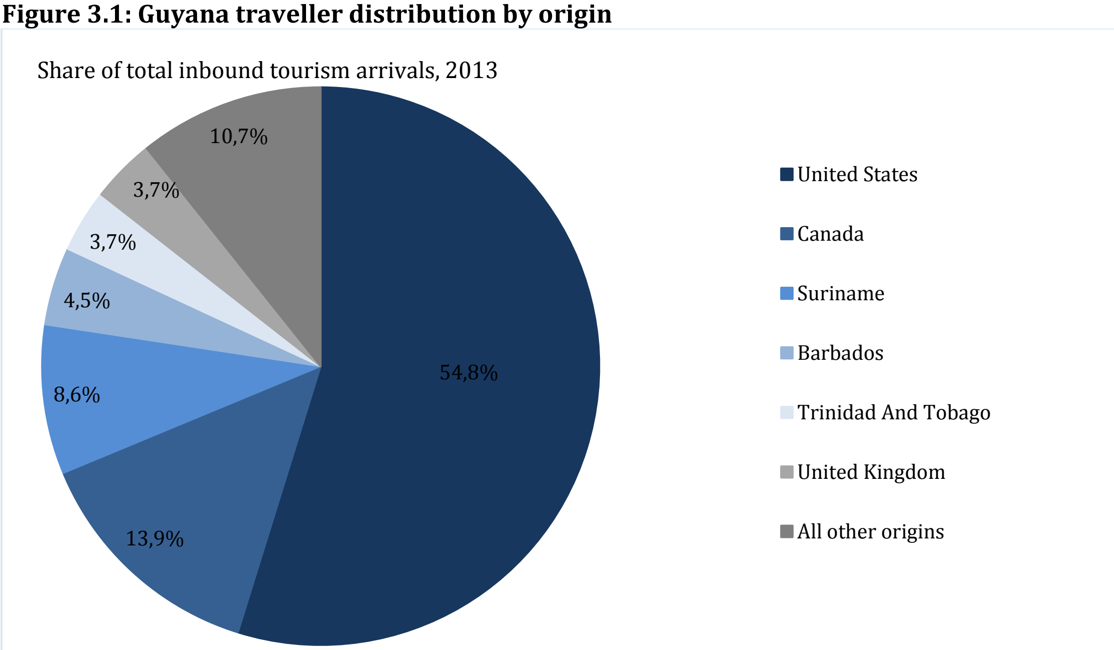
3. Case Studies on Travel Facilitation

The following detailed case studies represent a sample of the historically observed instances of visa reforms involving OIC member countries and subsequent changes in tourism trends. They provide examples of a variety of visa policy options and illustrate the potential benefits for each reform. These case studies serve as inputs to the model for estimating the impacts of future visa policy facilitation discussed in the previous section and, as such, inform the recommendations for potential reforms within the OIC at the end of this study.

3.1. Guyana visa on arrival scheme (2012)

Located near the northern tip of South America, Guyana is one of two OIC Member Countries located in the Americas. The majority of tourism demand in Guyana originates from within the Americas, with the United States and Canada representing the two largest origin markets. Suriname – the only other OIC Member Country located in the Americas – is Guyana's third largest origin market.

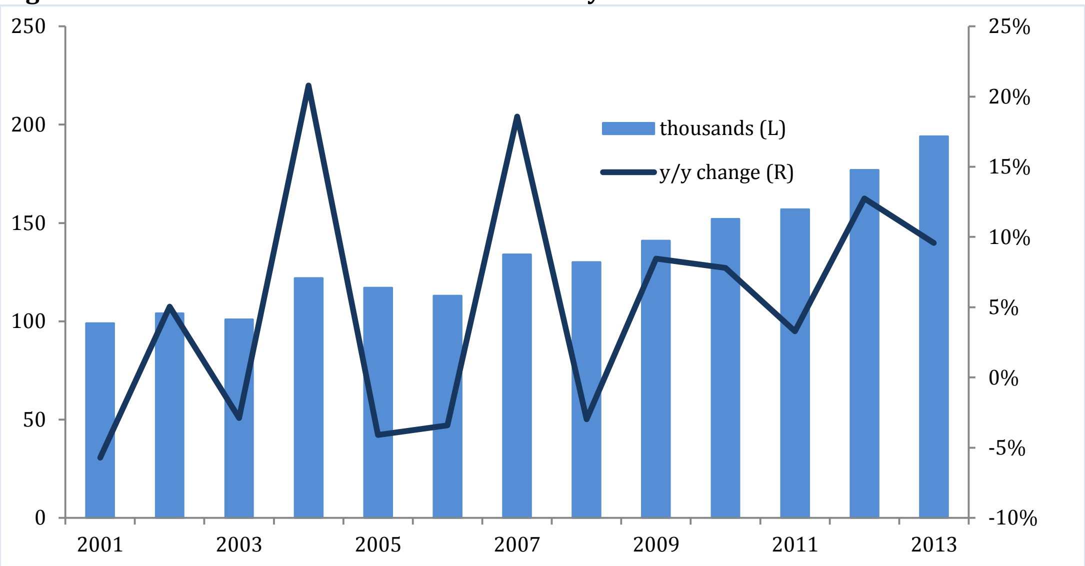
Figure 3.1: Guyana traveller distribution by origin



Source: UNWTO, Tourism Economics

Between 2002 and 2011, total overnight tourism arrivals to Guyana grew at an average annual rate of 5%, below the South America and OIC averages of 6% and 7%, respectively. In 2008, 86% of the world's population required a traditional visa to enter Guyana. Thus, while the nation's openness to tourists was on par with the average across all OIC Member Countries, travellers tended to favour other destinations in the region.

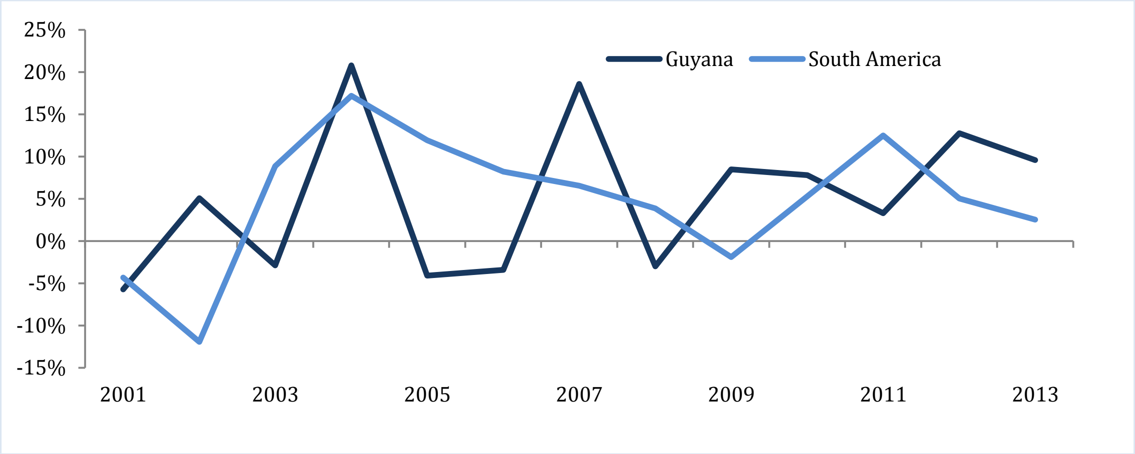
Figure 3.2: Total inbound tourism arrivals to Guyana



Source: UNWTO, Tourism Economics

In February 2012, Guyana introduced a Visa on Arrival (VoA) scheme for all non-resident travellers entering the country. That year, total overnight visits to the South American nation grew 13% – the highest annual gain not following a decline in the previous year since 2000. The 2012 spike more than tripled the trend rate of growth over the previous ten years and netted 20,000 more overnight arrivals to Guyana than in the previous year. The Visa on Arrival (VoA) scheme set the stage for more robust tourism growth, as tourist arrivals to Guyana have grown more than twice as fast as those to South America following the reform.

Figure 3.3: Growth in total inbound tourism arrivals



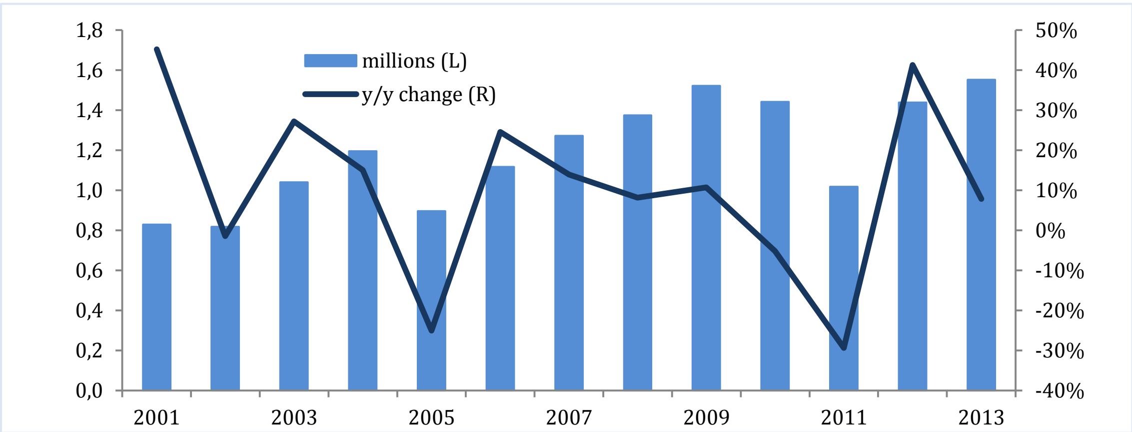
Source: UNWTO, Tourism Economics

Despite accounting for a relatively small portion of tourism arrivals and travel spending of the total received by OIC member countries, Guyana is the group's most open destination with the current VoA scheme in place. Currently, VoA is available to 80% of the world's population travelling to Guyana. The country's adoption of VoA and the subsequent surge in tourism provide a prime example of the potential benefits of travel facilitation.

3.2. Oman visa fee reduction (2012)

Oman – located on the Arabian Peninsula – is near the middle of the pack among OIC Member Countries in terms of total inbound tourist arrivals and travel spending. Yet, demand for travel to Oman has grown considerably over the last decade, with double-digit travel spending growth realized in seven of the ten years ending in 2013. India and the UAE account for roughly a quarter of tourist arrivals. The share of travellers to Oman from major European origin markets – namely Germany, the UK, and France – along with the US had been growing steadily prior to 2011, when demonstrations related to the Arab Spring revolution disrupted travel flows into the country. Since then, Western origin markets have accounted for a declining share of inbound travel to Oman.

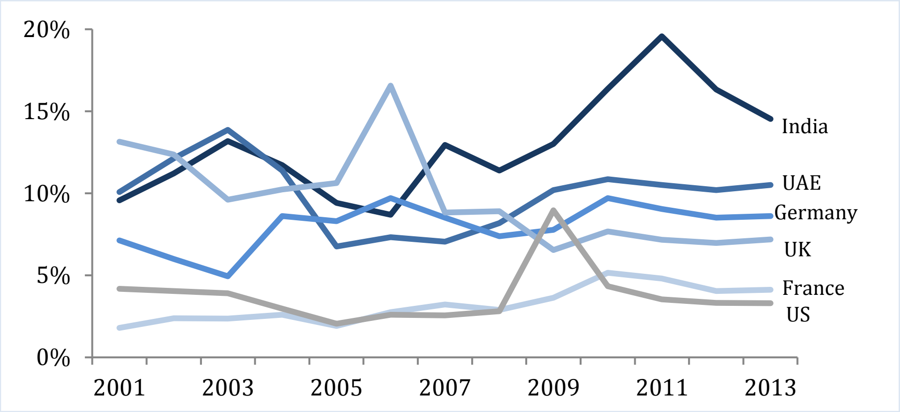
Figure 3.4: Total inbound tourism arrivals to Oman



Source: UNWTO, Tourism Economics

Travel to Oman has fluctuated considerably in recent years. Year-to-date tourism arrivals to Oman fell 9% over the first three months of the year relative to the same period in 2010. Total 2011 arrivals fell 7% from their 2010 level. Further, Oman's openness to international travellers has declined markedly over the past several years. The share of the world population requiring a traditional visa to enter Oman rose from 28% in 2008 to 72% in 2014, as VoA availability fell dramatically.

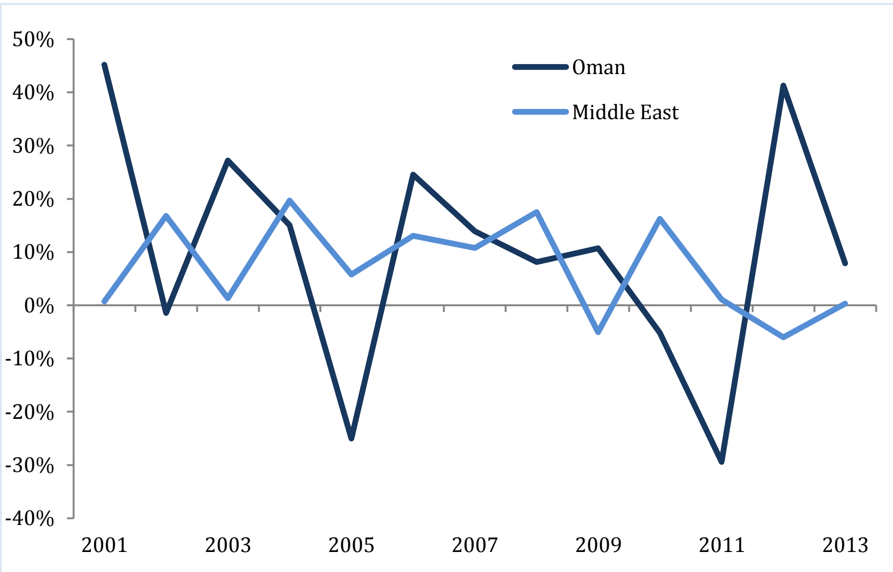
Figure 3.5: Oman traveller distribution by origin



Source: UNWTO, Tourism Economics

In order to spark more tourism demand under its more restrictive visa scheme, Oman lowered the fees associated with several types of tourist visas by upwards of 75% in February 2012. The cost of a ten-day tourist visa was lowered to $13 and fees associated with 24-hour cruise visas were eliminated. Soon after, the length of stay for the free cruise visa was extended from 24 to 48 hours. Total arrivals, excluding cruise visitors, to Oman subsequently rose 23% in 2012 over the previous year – well above the historical trend growth. To be sure, some of the gain represented a rebound from the slump in early 2011.

Figure 3.6: Growth in total inbound tourism arrivals



Source: UNWTO, Tourism Economics

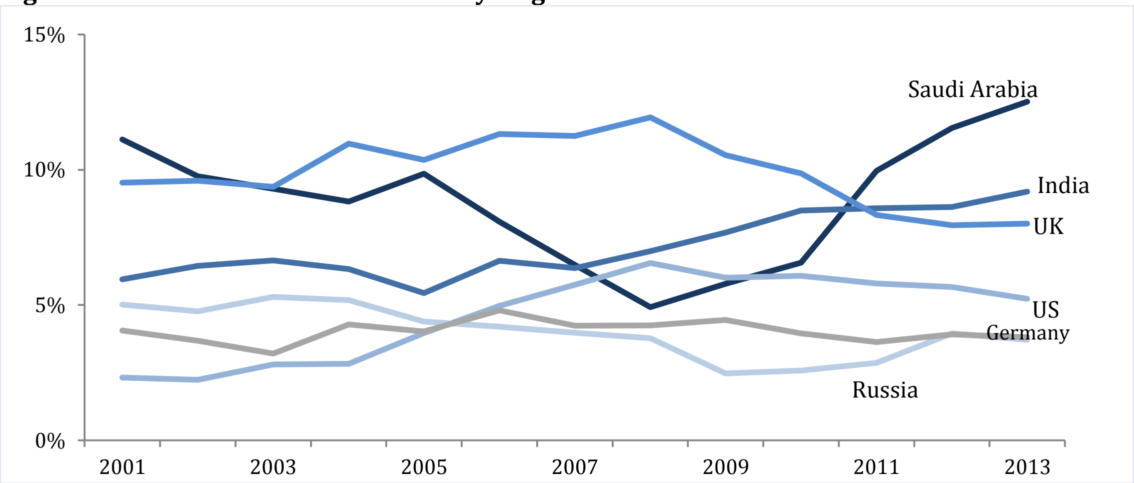
The visa fee reductions accelerated the rebound in international arrivals to Oman through 2012, more than making up for the number of lost arrivals in the previous year. Roughly 321,000 additional visitors travelled to Oman in 2012 compared with 2011. By 2013, tourism demand had completely recovered to its pre-2011 level. That year, inbound tourist arrivals to Oman grew by 14%. For comparison, the number of international arrivals to the Middle East region was unchanged in 2013.

Oman has succeeded in other travel facilitation areas as well. A Memorandum of Understanding (MOU) between Oman and both Qatar and Dubai, allowing non-GCC travellers to travel from Oman to both destinations and vice versa with a single joint visa has contributed to the inbound tourism in Oman. Travel between Oman and Dubai rose from 19,916 in 2012 to 21,894 in 2013.

3.3. UAE multiple-entry visa scheme (2012)

The United Arab Emirates is one of the fastest growing tourism destinations among the OIC Member Countries. Annual growth in total inbound tourist arrivals averaged 14% over the ten years ending in 2011. Over the same period, travel spending to the UAE grew at an average rate of over 25% per annum. The UAE's distribution of tourism source markets has evolved considerably from the early 2000s, incorporating an increasing share of Western origins. Currently, Europe represents the second largest regional source of UAE tourism behind the Middle East.

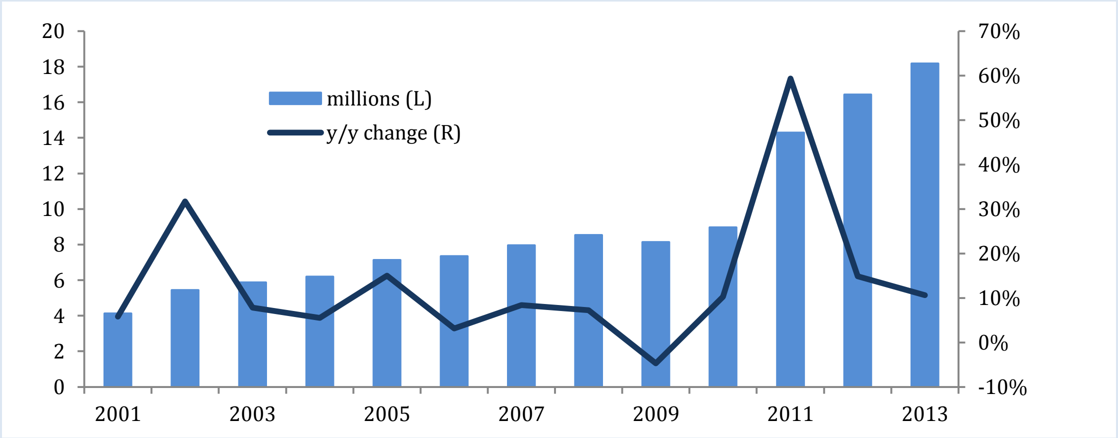
Figure 3.7: UAE traveller distribution by origin



Source: UNWTO, Tourism Economics

In terms of openness, the UAE is now among the least restrictive OIC member countries, requiring a traditional visa of just 5% of the world's population – down from 84% in 2008. The rising popularity of tourism to the UAE – especially via cruise ships – has prompted more relaxed visa policies. As a result, the UAE has assumed a greater share of the global tourism market, receiving nearly 7% of total inbound arrivals and 11% of total inbound travel spending to all OIC member countries in 2013.

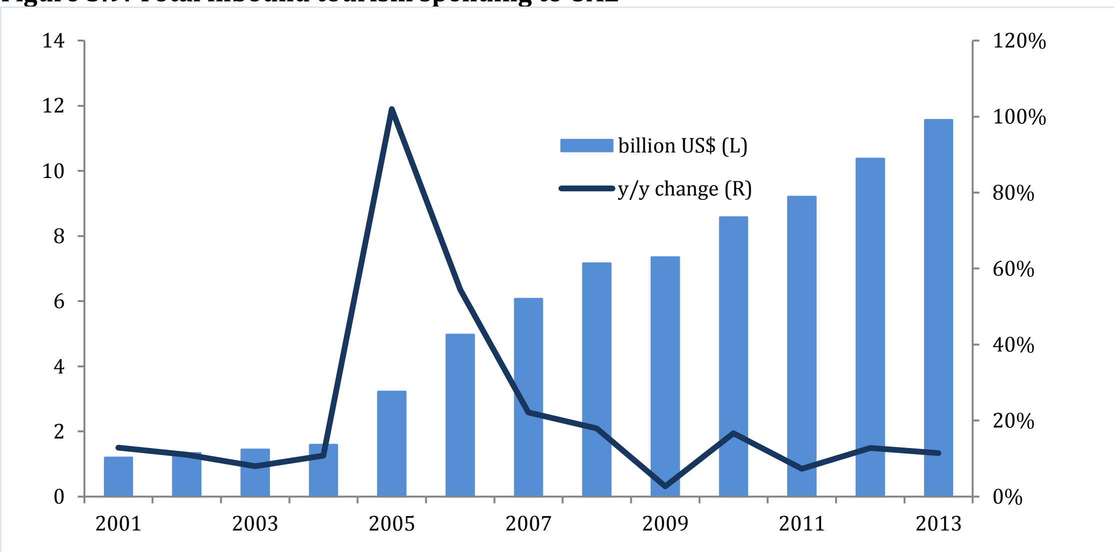
Figure 3.8: Total inbound tourism arrivals to UAE



Source: UNWTO, Tourism Economics

In November 2012, the UAE introduced a multiple-entry visa scheme which allowed cruise tourists to apply for a 3 month multiple-entry visa with a maximum stay of 14 days each visit. The scheme was also extended to businessmen and property investors who were offered multiple-entry visas for up to 6 months with a maximum stay of 30 days each visit. Total tourist arrivals rose steadily in the first seven months after the scheme's introduction, averaging 14% year-over-year growth between December 2012 and June 2013, slightly above the 2012 annual average of 12%. Spending by tourists also ramped up after the introduction of the multiple-entry visas, growing by 13% in 2012 and 11% the following year, compared to 7% in 2011.

Figure 3.9: Total inbound tourism spending to UAE



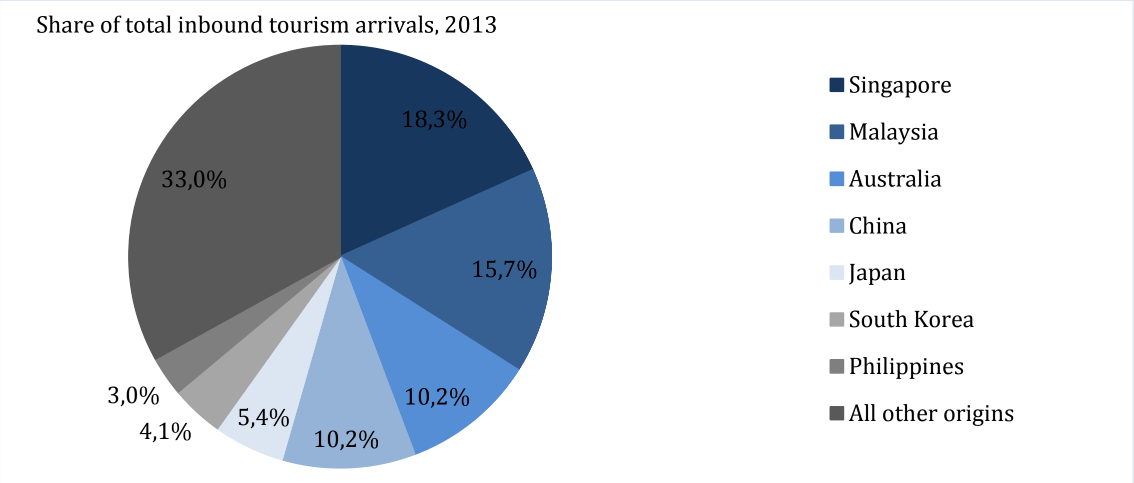
Source: UNWTO, Tourism Economics

The impact of the facilitative reform on tourism to the UAE may seem somewhat muted in 2012, given the surge in arrivals and spending in 2011. The pre-reform jump is largely attributable to a shift in traveller preference away from Middle Eastern countries experiencing the Arab Spring revolution toward the relatively more secure UAE. As the revolution has subsided or resolved in most of the affected countries, the simplified visa process for cruise tourists has partially propped up demand for leisure tourism to the UAE, prompting cruise lines to increase the number of cruises with UAE port cities on their itineraries.

3.4. Indonesia 30-day vs 7-day visa on arrival scheme (2010)

Among the OIC Member Countries, Indonesia is the second largest inbound tourism market within the Asia Pacific region behind Malaysia. In 2013, Indonesia received nearly 5% of total inbound tourist arrivals and 7% of total inbound travel spending to all OIC Member Countries. While many OIC Member Countries rely heavily on tourism from Western origins, the majority of demand for travel to Indonesia stems from source markets in the Asia Pacific. In fact, more than two-thirds of tourist arrivals to Indonesia originated from Asia Pacific countries in 2013.

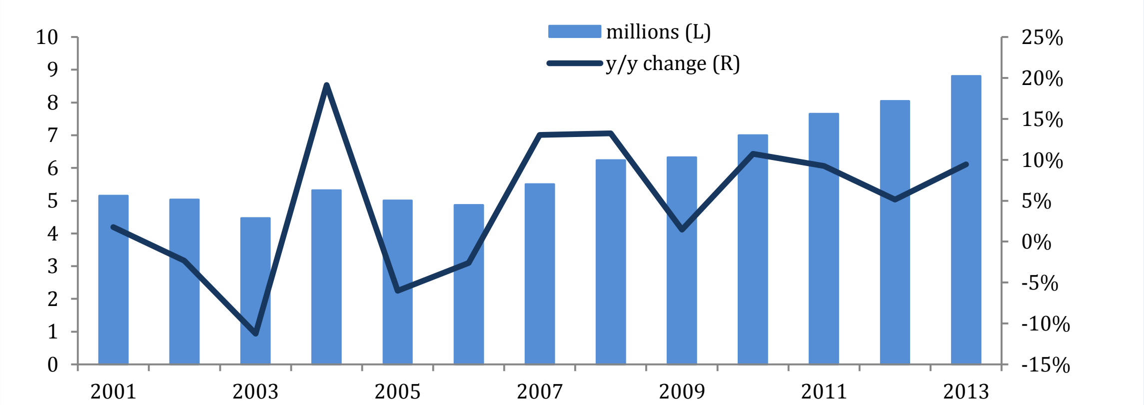
Figure 3.10: Indonesia traveller distribution by origin



Source: UNWTO, Tourism Economics

While Indonesia's openness to travellers has increased in the past five years, the desire to curb opportunities for abuse of visa policies has constrained the level of facilitation achieved by reforms.[44] As it stands, VoA is available to 66% of the world's population travelling to Indonesia.

Figure 3.11: Total inbound tourism arrivals to Indonesia

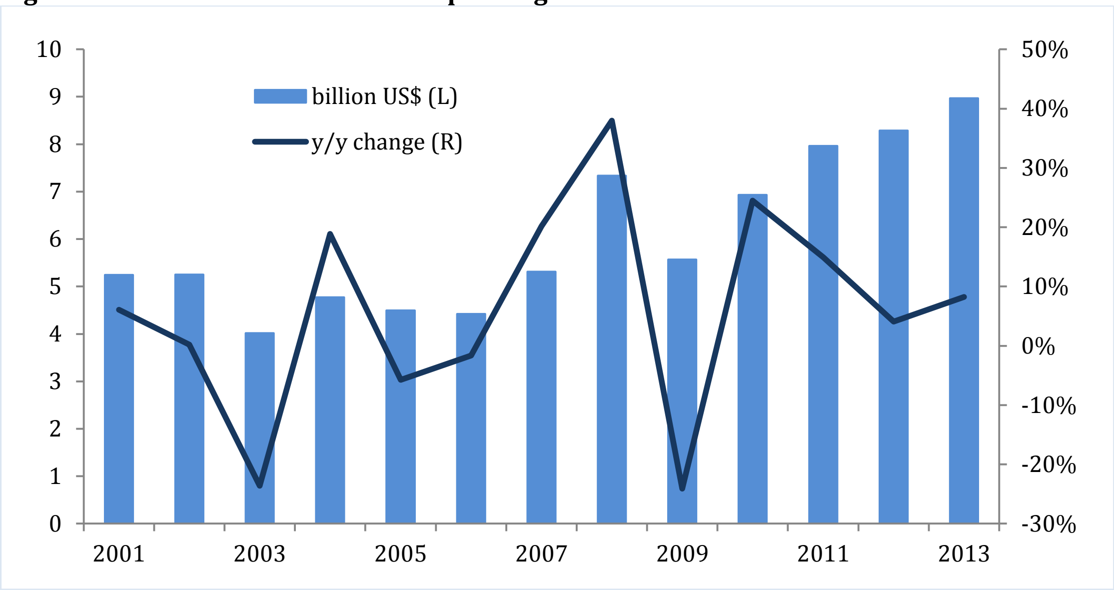


Source: UNWTO, Tourism Economics

[44] Bali Discovery Tours (2010), Sudden Change to Indonesia's Visa Rules Causes Concern in Tourism Circles (Online), available: http://www.balidiscovery.com/messages/message.asp?Id=5793

Indonesia altered its VoA scheme in January 2010 in order to increase arrivals by tourists and their average length of stay. The previously-available $10 7-day visa was abolished, leaving only the $25 30-day visa. Though the price of a VoA in Indonesia increased, officials hoped that prolonging the time period between visa renewals would encourage visitors to extend their stay. Yet, some were concerned that elimination of the less expensive, shorter stay visa might discourage foreigners who frequently make short trips to Indonesia.

Figure 3.12: Total inbound tourism spending to Indonesia



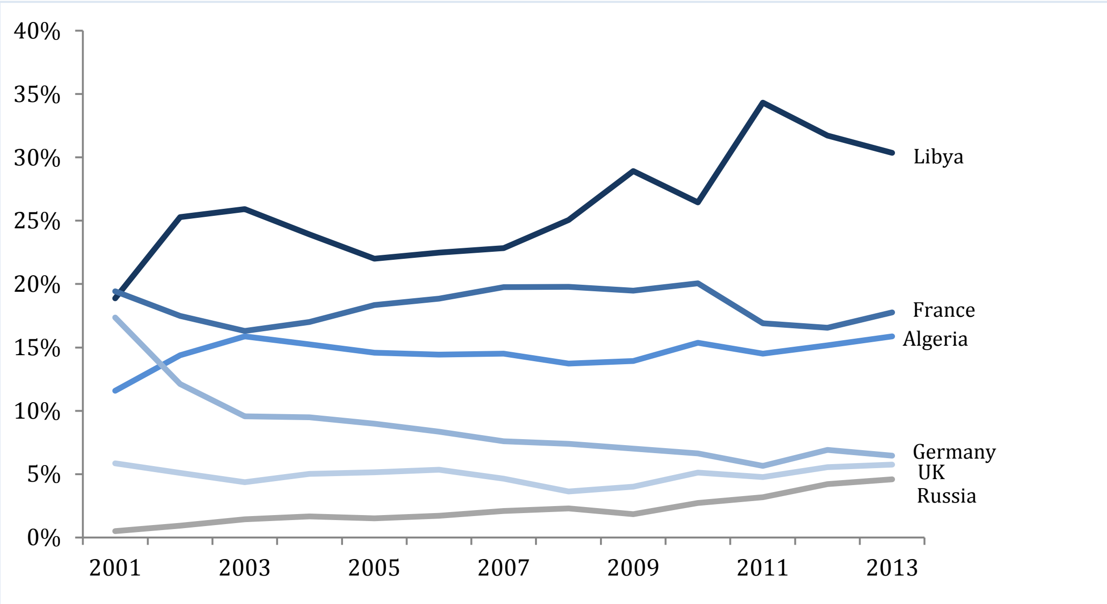
Source: IMF, Tourism Economics

Both inbound arrivals and travel spending have steadily risen since the reform, while the average length of stay in Indonesia has been relatively unchanged at just below 4 nights per trip. Overnight tourist arrivals to Indonesia grew by 11% in 2010, after recording just a 1% increase the year prior. Total tourist expenditures jumped 26% in 2010, completely overturning an equal decline in 2009.

3.5. Visa-free travel to Tunisia for GCC members (2012)

Tunisia – one of the largest inbound tourism markets among the OIC Member Countries – has struggled to maintain steady growth in tourism demand over the past several years due to political instability and the impact of the global recession on Western tourism demand. After increasing steadily through the early 2000s, tourism arrivals to Tunisia began to decline in 2008 as the nation's key European source markets succumbed to the financial crisis that began in the US and quickly spread to other debt-burdened Western countries.

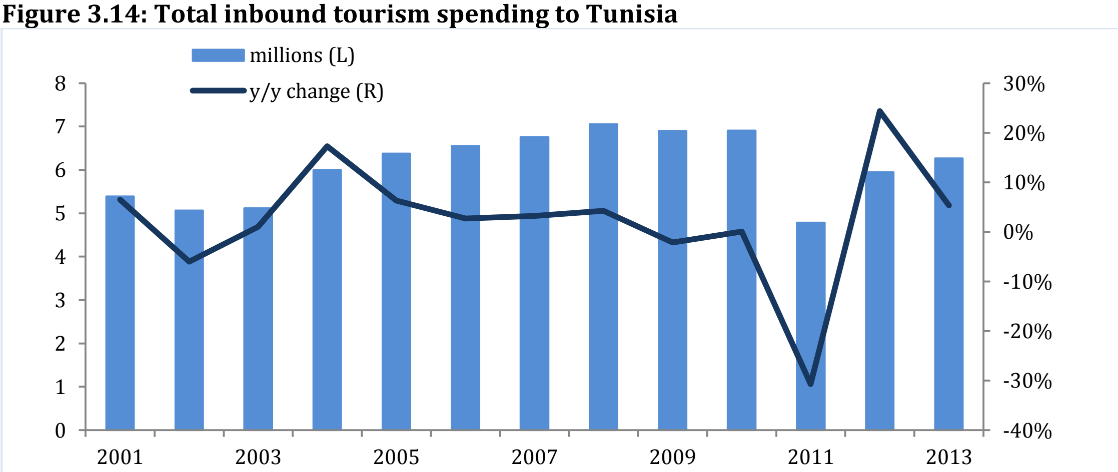
Figure 3.13: Tunisia traveller distribution by origin



Source: UNWTO, Tourism Economics

The nation's tourism industry weakened into 2011, due to a series of demonstrations starting in December 2010. Overnight tourist arrivals fell by more than 30% in 2011 over the previous year. The same year, Tunisia experienced a 28% drop in inbound tourism spending.

Figure 3.14: Total inbound tourism spending to Tunisia

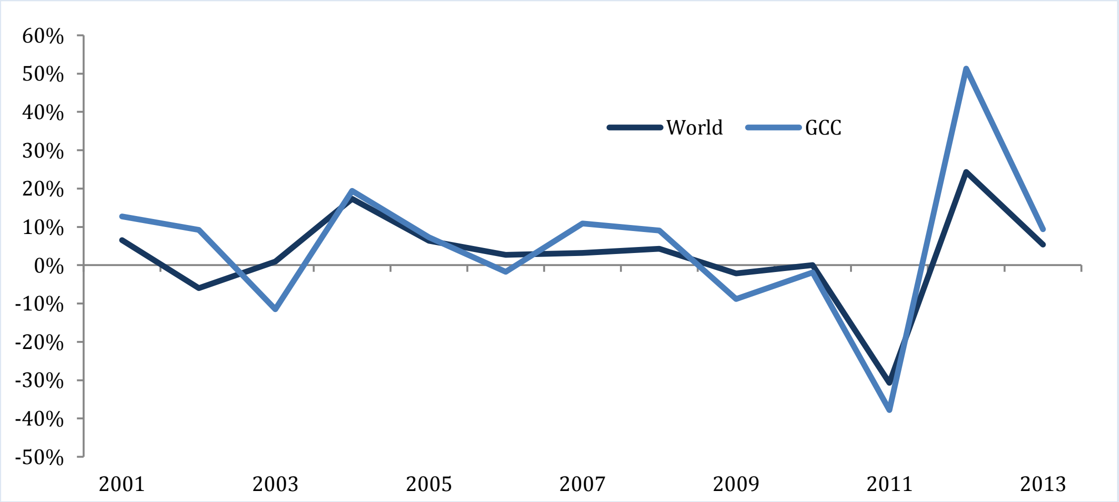


Source: UNWTO, Tourism Economics

Faced with weak tourism demand from key long-haul markets – such as France, Germany, Italy, and Belgium – officials moved to lift visa requirement for citizens of all Gulf Cooperation Council (GCC) member countries in May 2012. That year, total overnight visits by GCC nationals to Tunisia soared by 51%, compared with total arrivals from all foreign sources which rose by 24%. Since then, growth in inbound travel from GCC countries to Tunisia has continued to outpace that of total inbound travel, even as the economic recovery of the West has progressed.

In the framework of boosting cooperation and consolidating bilateral relations between Tunisia and a number of key origin countries, Tunisian officials also exempted citizens of the following countries from requiring an entry visa: Russian Federation, Czech Republic, Estonia, Moldova, Australia, Singapore, New Zealand, Costa Rica, Cape Verde, Equatorial Guinea, Guinea Bissau, Namibia, Gabon, South Africa, Slovakia, Latvia, Lithuania, and Montenegro.

Figure 3.15: Tunisia tourism arrivals growth by origin



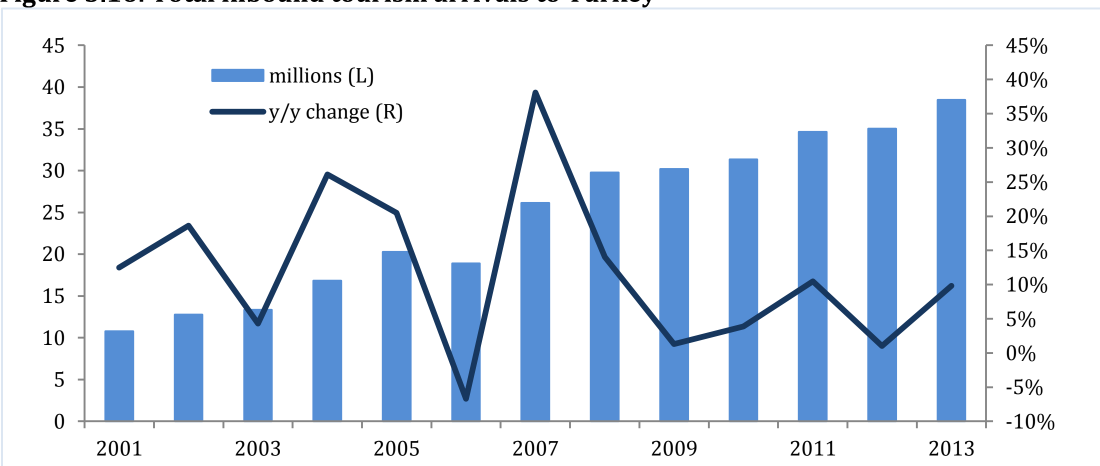
Source: UNWTO, Tourism Economics

While 77% of the world's population requires a traditional visa to enter Tunisia, 22% are able to enter visa-free, making it the seventh most open OIC member destination in terms of visa-free travel. Still, Tunisia's overall openness is below the average among OIC Member Countries, leaving room for further facilitative reforms.

3.6. Mutual visa exemption between Turkey and Russia (2011) and Turkey E-visa program

Turkey is the largest inbound tourism market among OIC member countries in terms of both arrivals and travel spending. Nearly 22% of all inbound tourist arrivals and over 21% of total travel spending in OIC member countries were received by Turkey in 2013. Over the past ten years, arrivals to Turkey have grown at an average annual rate of 12%. In comparison, arrivals to all OIC Member Countries grew at an average rate of 8.5% per annum.

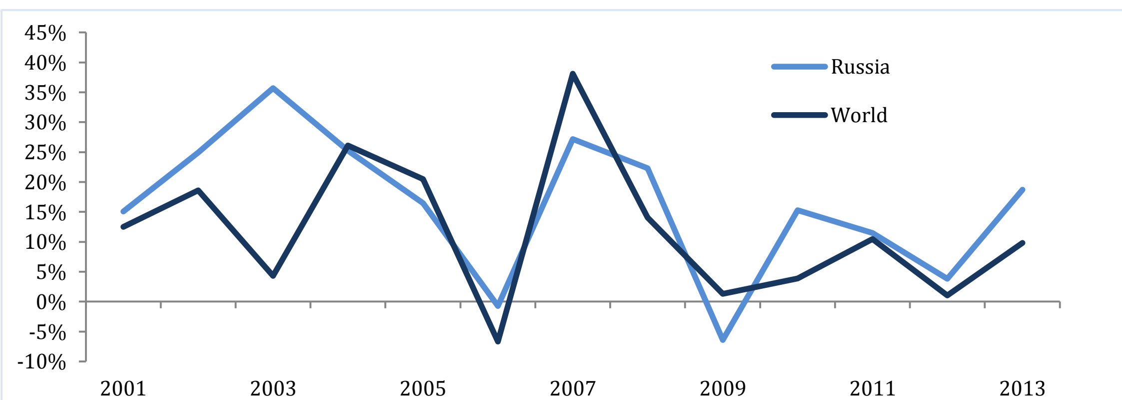
Figure 3.16: Total inbound tourism arrivals to Turkey



Source: UNWTO, Tourism Economics

The growth premium in demand for tourism in Turkey is partially due to its improving openness in recent years. In 2008, 70% of the world's population required a traditional visa to enter Turkey, while visa on arrival was available to another 14%, and the remaining 16% could enter visa free. Now, just 65% of the world's population is required to obtain a traditional visa; the former visa on arrival scheme has been replaced with electronic visa processing; and the remaining 21% are afforded visa-free entry. Currently, Turkey ranks slightly above the OIC average in terms of overall openness.

Figure 3.17: Growth in tourism arrivals to Turkey by origin



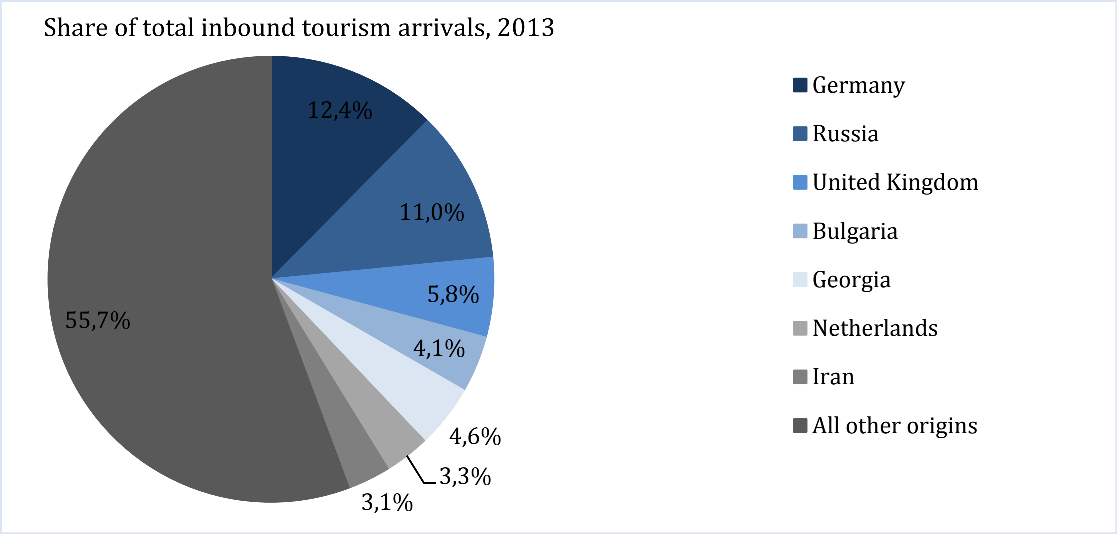
Source: UNWTO, Tourism Economics

A key facilitative reform was the joint visa-free travel agreement reached between Turkey and Russia in 2011. In April 2011, Russian nationals were granted visa-free access to Turkey, and vice versa. That year, tourist arrivals from Russia to Turkey grew by 11.5% – the fastest rate among Turkey's top-five source markets. Tourism demand from Russia continued to grow at a premium once visa-free travel was introduced. Between 2011 and 2013, the compound annual growth rate of tourist arrivals from Russia to Turkey (11%) grew at a 6 percentage point premium over total arrivals to Turkey (5%).

Prior to the reform, demand for tourism in Turkey from Russia had been steadily expanding, both in terms of absolute arrivals and its share of total arrivals to Turkey. A decade earlier, Russia accounted for roughly 7% of total inbound arrivals to Turkey – Germany was the clear frontrunner, representing 26% of Turkey's inbound tourism market. By 2013, the Russian share of total arrivals to Turkey had reached 11% – roughly on-par with Germany, whose share had dropped by more than 50% with the ascension of smaller source markets.

More broadly, Turkey launched the e-Visa Application System on April 17, 2013, and has now processed more than one million e-Visas to citizens of the 98 eligible countries. In 2013, 40 percent of foreigners who visited Turkey entered the country with visa, while 60 percent of them travelled visa-free. The system represents a shift from the visa on arrival program and has been widely communicated with the benefit of taking approximately three minutes to complete online. The benefits of the program have been evident in both 2013 and 2014. Foreign visitor arrivals increased 10% in 2013 and another 5% through November of 2014.

Figure 3.18: Turkey traveller distribution by origin

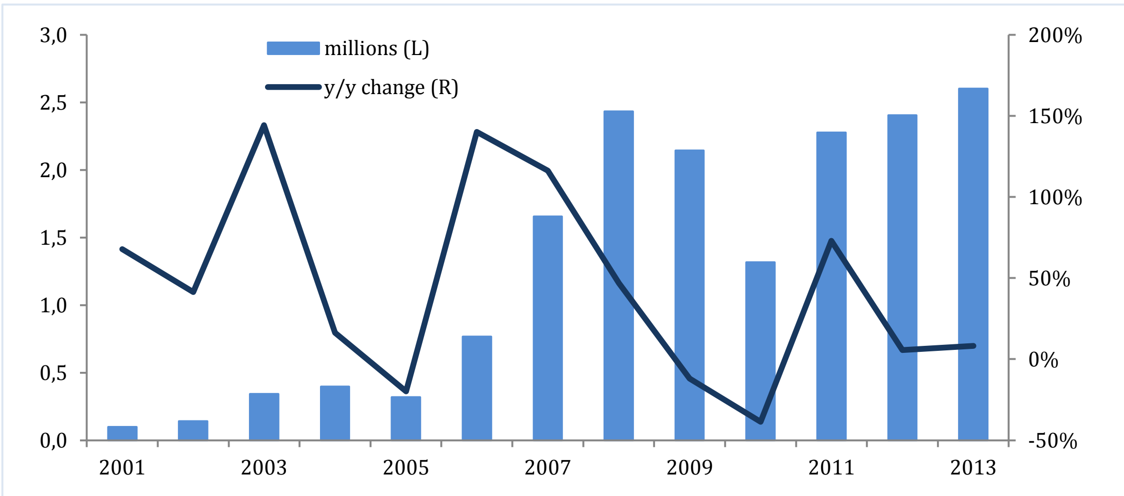


Source: UNWTO, Tourism Economics

3.7. Visa-free travel to Kyrgyzstan (2012)

Kyrgyzstan's popularity as a tourist destination has increased dramatically over the past decade. In 2003, inbound tourist arrivals to Kyrgyzstan represented less than half of a percent of total arrivals to all OIC Member Countries. In 2013, the country's share of total arrivals to OIC Member Countries was nearly 2%. Growth in demand for tourism in Kyrgyzstan has not been uniform, however.

Figure 3.19: Total inbound tourism arrivals to Kyrgyzstan



Source: UNWTO, Tourism Economics

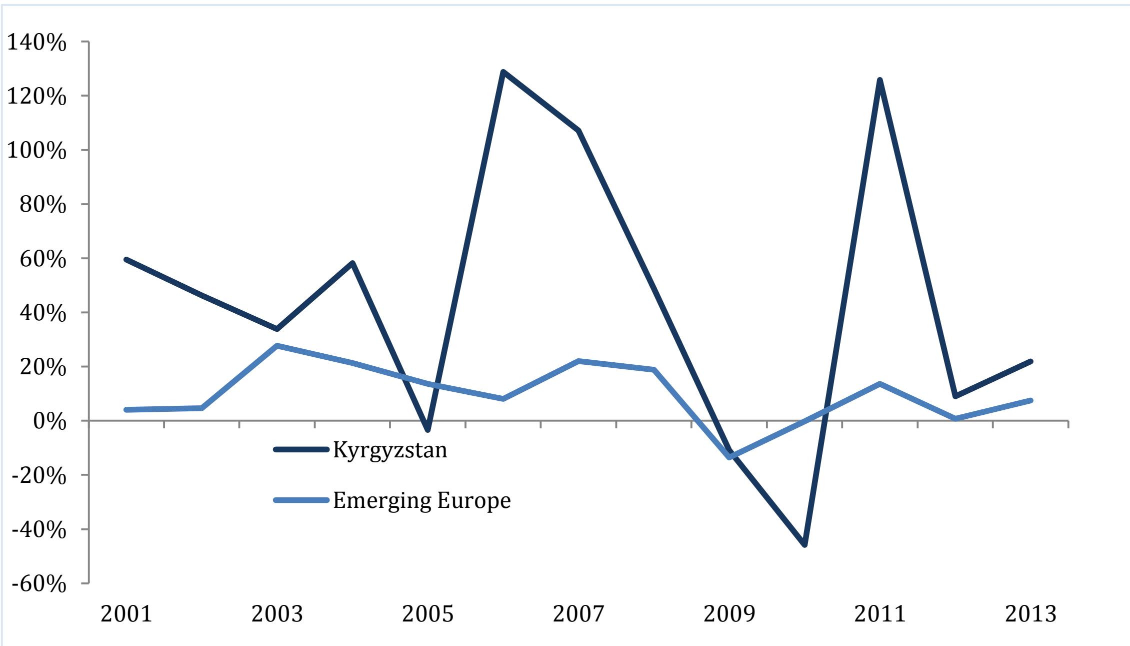
Demonstrations disrupted travel flows to Kyrgyzstan for much of 2010, causing growth in tourism demand to drop off sharply from its previous rapid pace. As the situation stabilized in 2011, demand for tourism in Kyrgyzstan began to recover. Arrivals to Kyrgyzstan returned to trend, and tourism spending surpassed its previous peak.

Figure 3.20: Total inbound tourism spending to Kyrgyzstan

Source: IMF, Tourism Economics

In an effort to further boost demand, Kyrgyzstan widened its visa-free travel program in July 2012, granting citizens from 44 additional countries access for up to 60 days. Among the countries affected were the US, UK, several EU nations, and a host of others located in Eastern Europe, the Middle East, and Asia. Previously, travellers from just 16 countries were allowed to enter Kyrgyzstan without a visa. Following the reform, growth in tourist arrivals to Kyrgyzstan has been on-par with the rest of Emerging Europe. After rebounding in 2011, tourism spending by foreigners in Kyrgyzstan grew by 20% in both 2012 and 2013, far exceeding the average for the region.

Figure 3.21: Growth in total inbound tourism spending



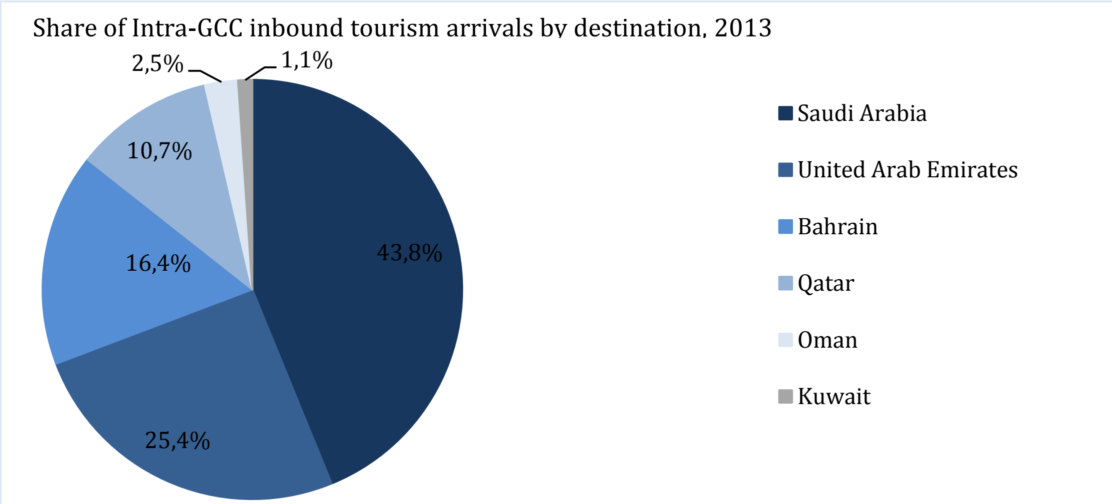
Source: IMF, Tourism Economics

Prior to the expansion, just 11% of the world's population was able to visit Kyrgyzstan visa free. That share more than doubled to 23% as a result of the change, making Kyrgyzstan the fifth largest grantor of visa-free travel among OIC Member Countries. Still, 64% of the world's population requires a traditional visa to enter Kyrgyzstan, leaving considerable room for further travel facilitation.

3.8. Visa facilitation arrangements in GCC countries

The Gulf Cooperation Council (GCC), established in May 1981, is a political and economic union between six states located on the Arabian Peninsula: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and United Arab Emirates. Since the GCC's creation, steps have been taken to facilitate travel among member countries. Foremost is the mutual visa exemption among GCC members which allows all GCC nationals to travel among member states visa-free.

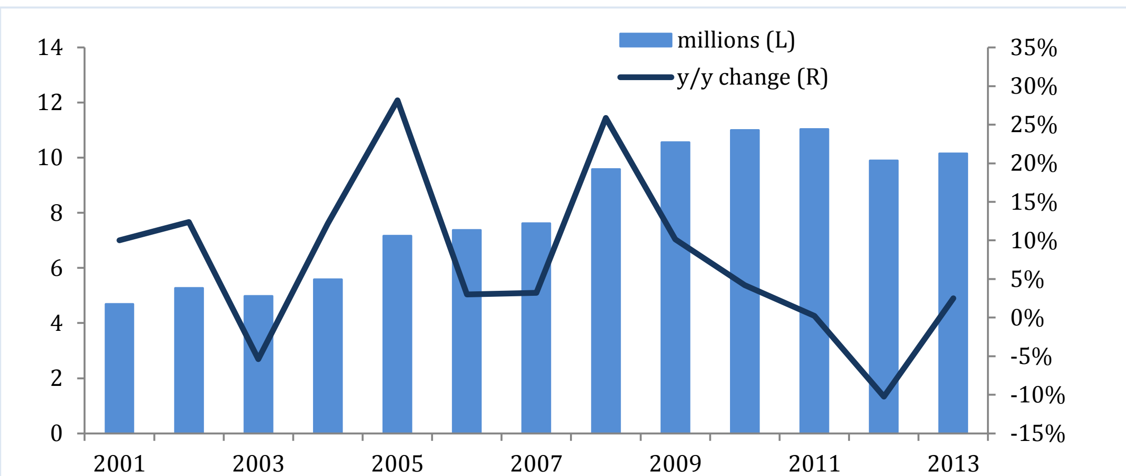
Figure 3.22: Intra-GCC tourism arrivals distribution



Source: UNWTO, Tourism Economics

Over the past ten years, intra-GCC travel has grown at average annual rate of 6.5% – roughly on par with growth in world arrivals (excluding intra-GCC travel) to the bloc (7.1%). As a share of total world travel to the bloc, intra-GCC arrivals accounted for an average of 32% over that same period, with Saudi Arabia standing out as the most frequently visited destination for GCC tourists.

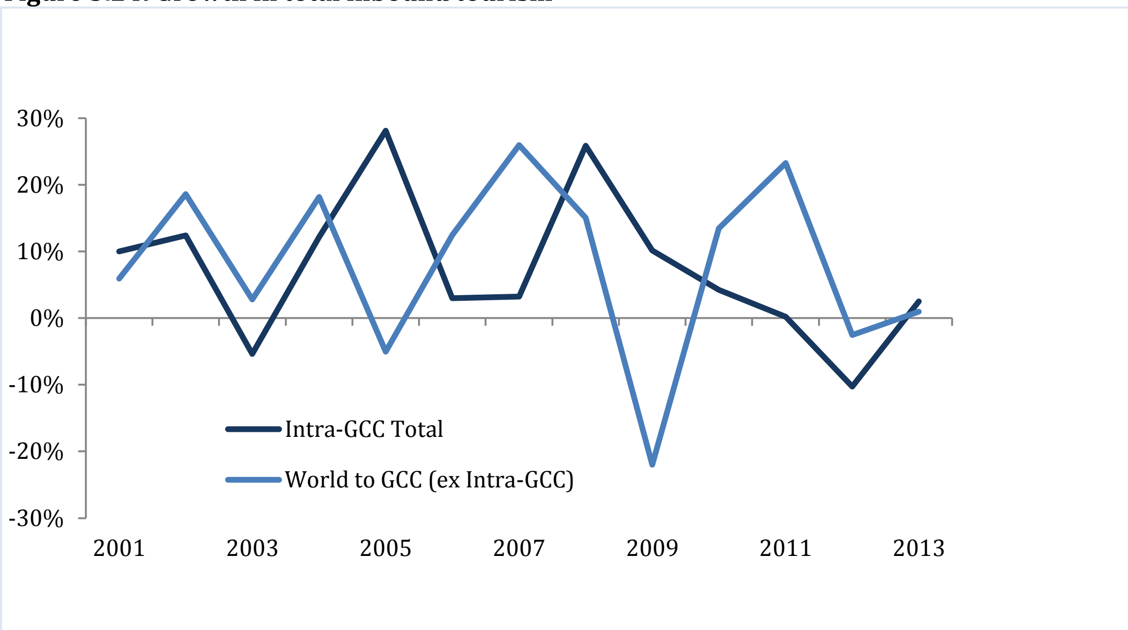
Figure 3.23: Total intra-GCC tourism arrivals arrivals



Source: UNWTO, Tourism Economics

Further efforts are being made to facilitate travel both within the GCC and from points of origin outside the bloc in the near future. A unified GCC tourism visa, similar to the Schengen visa in Europe, is to be implemented in 2014.[45] The program would allow approved non-GCC travellers to enter and travel about the bloc on a single joint visa, which would be available in both a one month single-entry form and for multiple entries over the period of a year. Similar agreements already exist between Qatar and Oman, and Dubai and Oman.[46]

Figure 3.24: Growth in total inbound tourism



Source: UNWTO, Tourism Economics

Additionally, a rail network stretching from the Abu Dhabi-Saudi Arabia border to the Oman border is under construction and carries the potential for passport-free travel for GCC nationals.[47] The proposed arrangement would allow GCC nationals to travel via train throughout the bloc simply with a form of national identification, eliminating the need to present a passport at GCC border crossings. The GCC railway is slated for completion in 2018.

[45] The Times of India (2013), Unified visa for Gulf Cooperation Council member countries by 2014 (Online), available: http://timesofindia.indiatimes.com/world/middle-east/Unified-visa-for-Gulf-Cooperation-Council-member-countries-by-2014/articleshow/22066562.cms

[46] ArabianIndustry.com (2014), GCC tourism boards call for fewer visa restrictions (Online), available: http://arabianindustry.com/travel/news/2014/may/5/gcc-tourism-boards-call-for-fewer-visa-restrictions-between-countries-4686474/#close

[47] Gulf News (2014), Passport free travel across GCC possible (Online), available: http://gulfnews.com/news/gulf/uae/passport-free-travel-across-gcc-possible-1.1283891

3.9. Lessons learned from case studies

The case studies described in Section 3 show a clear correlation between changes in visa policy and increases in tourism activity. From them, the following lessons can be distilled.

Travel facilitation can enhance the visibility of destinations

Significant dividends can be realized by less well known destinations by opening up to travel markets, as experienced by Guyana in 2012. Their visa on arrival program provided a competitive advantage with immediate returns.

Reducing openness tends to result in a loss of market share

Declines in openness are the equivalent of a self-imposed trade barrier. When countries enact policies that limit visitor market access, they lose market share. This was evident in Oman's performance as its share of the world population requiring a traditional visa to enter rose from 28% in 2008 to 72% in 2014.

Costs matter

Reducing the costs of travel can help to generate additional travel demand. Lowering visa and other entry fees is one available lever to policy makers and was proven to be effective in Oman in 2012.

Openness is a competitive advantage

Destinations with greater openness to visitor markets tend to gain market share. This has been particularly evident in the UAE, which is one of the most open destinations in the OIC and has outperformed the region.

Private sector investment can be induced by openness

Dubai experienced increases in cruise line routes as a result of simplified visa processes for cruise visitors. The same relationship exists for investment in the lodging, attractions, and transportation sectors. Travel facilitation drives private sector investment.

Even modest improvements can make a difference

Although not as significant as visa on arrival or visa free travel, multiple entry visas, extended visa validity periods, and processing improvements can all generate additional travel demand as experienced in the UAE in 2012.

Travel facilitation is a recovery tool

Destinations can use travel facilitation as a tool to kick-start recover from challenging market conditions. Tunisia effectively accomplished this in 2012 when it lifted visa requirements from GCC markets.

4. Conclusions

Given the substantial benefits to be gained from enhanced travel facilitation throughout the OIC, the OIC Member Countries need to work individually and in a coordinated effort to extend facilitative opportunities to all travellers. There are several steps which can be taken to increase the openness of the OIC destinations to the world, leading to positive impacts on the T&T sector and broader economy of each Member Country.

The conclusions of this study are informed by both best practices and observed benefits related to travel facilitation around the world. They are also consistent with the COMCEC Strategy which states that "COMCEC will facilitate tourism in its region through supporting the removal of the barriers to easier movement of people. Some members have already entered into bilateral agreements to lift visa requirements as a way of promoting tourism among them. COMCEC will spread this spirit and accelerate the simplification of visa and customs procedures."[48]

The following is a list of recommendations for travel facilitation in the OIC Member Countries:

- Facilitate travel through improved visa policies, including:
    - Improve the communication of visa requirements to travellers;
    - Increase the efficiency of visa application processes;
    - Facilitate travel for tourists who currently require traditional visas;
    - Promote reciprocally open visa policies;
    - Grant visa-free travel between OIC Member Countries; and
    - Foster cooperative global travel facilitation and create a joint-OIC visa;
- Facilitate travel through the development of new air routes and increase airline capacity, including more liberal air service agreements among the OIC Member Countries
- Engage in well-funded and targeted destination marketing

Each recommendation is outlined in detail below.

Improve the communication of visa requirements to travellers

Clearly communicating visa requirements to travellers is the first step of enhancing travel facilitation. Information on visa applications and travel procedures should be available online, provided in multiple languages, and updated daily. Live support should be available to travellers applying for entry visas through electronic communication or by phone. Visa policies should be enforced consistently across ports of entry, and any discrepancies between ports should be clearly communicated to travellers. Clear communication of visa policies and consistent enforcement thereof make travel to the destination easier and reduces the likelihood of violations and abuses.

[48] COMCEC Strategy, page 15, 2012

- Post up-to-date visa information online in multiple languages
- Offer live support for visa applicants
- Enforce visa policies consistently at ports of entry

Increase the efficiency of visa application processes

The visa application process should be streamlined and simplified as much as possible. This is consistent with the COMCEC Strategy's expected outcome to streamline tourism policies and to provide simplified and harmonized visa and custom procedures. Travellers should be permitted to apply for visas online. Visa processing capacity should be increased online and at ports of entry. Waiting periods for visa approval should be reduced. Requirements for personal identification documentation should be relaxed and in-person interviews eliminated. Visa application fees should be lowered or removed entirely.

- Provide online visa applications and increase visa processing capacity
- Reduce personal identification requirements and waiting periods
- Lower or eliminate visa application fees
- Increase processing capacity where needed to reduce wait times

Facilitate travel for tourists who currently require traditional visas

In 2014, an average of 64% of the world population is required to obtain a traditional visa prior to visiting a destination in the Member Countries. That leaves considerable room for more facilitative visa policies. Where some form of visa is required, officials should prioritize the implementation of visa on arrival and electronic visas (eVisa). Travel visas should be made valid for an extended period of time, limiting the need for reapplication, as exemplified by the recent agreement between the US and China to mutually increase the validity of short-term travel visas from one year to 10 years[49]. Visa-free travel should be granted during holidays, peak travel seasons, and special events. Officials should extend visa-free travel opportunities to tourists currently requiring a traditional visa, either universally or selectively by classification of traveller type.

- Replace traditional visa policies with visa on arrival or eVisa
- Grant visa-free entry on a seasonal basis
- Extend validity periods for travel visas
- Extend visa-free travel to tourists at every opportunity

[49] US Department of Commerce (2014), Statement from U.S. Secretary of Commerce Penny Pritzker on the Extension of U.S./China Visa Validity for Business Travelers, Tourists and Students (Online), available: http://www.commerce.gov/news/press-releases/2014/11/10/statement-us-secretary-commerce-penny-pritzker-extension-uschina-visa

Promote reciprocally open visa policies

Of the nearly 19,000 policy pairs including the OIC Member Countries, just 17% are reciprocally open[50], meaning that travellers do not require a visa. The remaining reciprocally non-open pairs conflict with the best interests of travellers from each origin country and the T&T sector of each destination country. Non-facilitative visa policies put in place to achieve restrictive reciprocity with other countries should be eliminated and replaced with visa-free travel. Being the first-mover in relaxing visa policies in non-open pairs will incite other countries to implement more facilitative policies, as well, mutually benefiting both the origin and destination markets.

- Eliminate reciprocally restrictive visa policies
- Be the first-mover in encouraging reciprocally open visa policies

Grant visa-free travel between OIC Member Countries

The economic and political benefits shared by the OIC Member Countries should not exclude those gained through travel facilitation. Officials should grant visa-free travel for the people from the Member Countries. Where possible, requirements of the people from the Member Countries to provide personal identification documentation upon entry to an OIC Member Country should be relaxed. For example, passport requirements for travel across shared OIC borders should be eliminated, allowing the people from the OIC Member Countries to gain access simply with a form of national identification. GCC member countries are already considering this relaxed policy to be implemented on a new inter-GCC rail line by 2018[51].

- Allow the people from the OIC Member Countries to travel visa-free between member countries
- Relax identification and passport requirements for intra-OIC travel

Foster cooperative global travel facilitation and create a joint-OIC visa

Officials should explore opportunities for cooperative travel facilitation with other economic and political blocs and regions and key non-OIC outbound travel markets, such as mutual visa-free travel agreements. A list of approved non-OIC origin markets should be agreed upon by OIC Member Countries, and visa-free entry should be extended to tourists from those markets. Further, a joint OIC visa – similar to that proposed by the GCC[52] or Europe's Schengen visa – should be extended to the approved non-OIC origin markets, eliminating individual visa requirements for travel to and among all OIC destinations.

- Pursue mutual visa-free travel agreements with other economic and political blocs, regions, and key non-OIC outbound travel markets
- Grant visa-free entry to an approved list of non-OIC origin markets
- Extend a join-OIC visa to approved non-OIC origin markets

[50] Table 4
[51] Section 3.8
[52] Section 3.8

Engage in destination marketing

Destination marketing has been a proven method of developing and expanding a nation's tourism product. Building transportation infrastructure and connecting to new markets facilitates travel to a destination. Raising the destination profile communicates the tourism offerings of a destination and increases awareness among prospective tourists. Effectively marketing a destination's tourism product – whether through direct outreach, advertising campaigns, or trade show demonstrations – also fosters tourism demand. Destination marketing campaigns by leading destinations around the world have achieved sizable returns on investment[53], successfully boosting tourism demand. Effective campaigns accomplish several goals:

- Build transportation infrastructure and connections to new markets
- Develop a destination profile
- Promote the tourism product to new and existing markets

This recommendation is also in line with the COMCEC Strategy which states that "COMCEC will support development of effective marketing strategies for raising awareness of the existing tourism destinations of the Member Countries."[54] In particular, the COMCEC Strategy seeks to develop greater utilization of electronic media in promotional efforts to reach target groups rapidly and effectively (including e-marketing and e-promotion) as well as to promote a generally better image of the member countries.

Funding for destination marketing has been consistently warranted by the economic returns that it generates. Various funding mechanisms have been proven to be successful, including general fund allocations and earmarks from tourism-specific levies such as departure taxes or entry fees.

Create new air routes and increase airline capacity

Developing a nation's aviation sector is critical to its growth as a tourism destination. Partnerships between tourism stakeholders and major airlines should be developed for the purpose of increasing the frequency of flights, number of connections, and access to visitor markets, while contributing to the destination's tourism profile. In order to accommodate greater visitor demand, airport capacity should be increased wherever possible, whether through the expansion of existing facilities or construction of new ones. Dubai's partnership with Emirates Airlines and Abu Dhabi's coordinated campaign with Etihad[55] should be considered the ideal arrangements to emulate. Public-Private Partnership (PPP) solutions can also be utilized for improving transportation capacity and connectivity.

- Partner with airlines to expand access to visitor markets
- Incorporate airlines into the destination's tourism profile
- Increase airport capacity
- Utilize Public-Private Partnership (PPP) solutions

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[53] Section 1.3.3
[54] COMCEC Strategy, page 17, 2012
[55] Section 1.3.2

Considering the variety of economic, cultural, and geographical characteristics among the OIC Member Countries, the adoption of these recommendations by any one member country is sure to have different impacts on its T&T sector and broader economy compared to other countries. While the analysis in Section 2.5 outlines a potential scenario where travel facilitation measures throughout the OIC Member Countries lead to increased tourist arrivals and additional positive impacts, the actual results of implementing such measures will ultimately vary. However, realizing the potential of tourism as a significant driver of growth in the OIC markets hinges on the adoption of the recommended means of travel facilitation outlined above.

Annex 1: OIC Member States

The Official 3 Regional Groups of the OIC Member States*

Arab Group	Asian Group	African Group
Algeria	Afghanistan**	Benin
Bahrain	Albania	Burkina Faso
Comoros	Azerbaijan	Cameroon
Djibouti**	Bangladesh	Chad
Egypt	Brunei Darussalam	Cote d'Ivoire
Iraq	Indonesia	Gabon
Jordan	Iran	Gambia
Kuwait	Kazakhstan	Guinea
Lebanon	Kyrgyzstan	Guinea-Bissau**
Libya	Malaysia	Mali
Mauritania**	Maldives	Mozambique
Morocco	Pakistan	Niger
Oman	Tajikistan**	Nigeria
Palestine**	Turkey	Senegal
Qatar	Turkmenistan**	Sierra Leone
Saudi Arabia	Uzbekistan	Togo
Somalia**	Guyana*	Uganda
Sudan	Suriname *	
Syria***		
Tunisia		
United Arab Emirates		
Yemen		

** Guyana and Suriname are in the Latin America Region. However due to the limited number of countries in that region, they are included in the Asian Group.*
*** Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Tajikistan, Palestine, Turkmenistan, and Somalia are excluded from visa policy facilitation analysis due to a lack of reliable tourism data from their respective national sources.*
****The Syrian Arab Republic's membership was suspended by the 4thExtraordinary Summit of the OIC.*

Annex 2: Travel Facilitation Analysis Methodology

The policy effect in Section 2.6 represents the growth premium in average tourist arrivals to each destination relative to their corresponding region over this five year period and varies by the type of policy implemented (visa exemptions versus visa on arrival or eVisa) and the relative competitiveness of each OIC destination. The policy effect is applied to the "addressable market" of each country, which represents the portion of each OIC Member Countries' tourist arrivals which currently requires some form of visa – these would include the "visa required", "visa on arrival" and "eVisa" categories defined by the UNWTO. Similar to the openness measure discussed in Section 5, which takes into account the population effected by a given visa policy requirement, the addressable market factors in the distribution of international tourist arrivals to each country.

The impacts on tourist arrivals are calculated by applying the policy effect to the forecast for the addressable market of international tourists for each OIC destination. They are calculated over a five-year period from 2015 to 2020 in order to allow for stabilisation in the policy effects. The increase in international tourist arrivals then informs the premium in tourism expenditures – more specifically, international tourism receipts – which is calculated from forecasts of the average expenditure per tourist for each country.[56]

The impacts on tourism employment are then calculated based on the projected increase in tourism expenditures and sales per employee for each country. Tourism sales per employee are derived from WTTC's research on internal tourism consumption and direct travel and tourism (T&T) employment for direct job impacts and total tourism demand and total T&T employment for the total job impact – which includes direct, indirect and induced impacts.

[56] Forecasts for the addressable market are derived from Tourism Economics' forecasts of bilateral tourist arrivals and tourism receipts for each country.

Annex 3: COMCEC Travel Facilitation Survey

This Study analyzed 49 Member Countries due to data limitations. The excluded countries are Afghanistan, Djibouti, Guinea-Bissau, Mauritania, Tajikistan, Palestine, Turkmenistan, and Somalia. To support the analysis the survey below was prepared and distributed to the Member Countries. The purpose of the survey was to identify current travel facilitation polices in place among the OIC Member Countries as well as opportunities for enhanced travel facilitation in the future.

The following is a list of the OIC Member Countries from which Tourism Economics received responses to the survey:

Albania
Azerbaijan
Iraq
Oman
Turkey
Malaysia

COMCEC Travel Facilitation Survey

COMCEC Study on Travel Facilitation for Enhancing Mobility
In the OIC Member Countries

Travel facilitation is one of the most powerful tools in fostering economic growth through tourism. Tourism Economics, an Oxford Economics Company, is conducting a study on current travel facilitation policies within the Organization of Islamic Cooperation (OIC) on behalf of the Standing Committee for Economic and Commercial Cooperation (COMCEC). Your input is critical in building an understanding of the current policies and opportunities as well as future ones associated with travel facilitation in the OIC Member Countries.

This survey will take approximately 15-20 minutes to complete. The deadline for submission is **September 5, 2014**. All completed surveys and questions should be directed to Anthony Antonik at **aantonik@oxfordeconomics.com**.

Thank you in advance for your participation. You will receive a copy of the finished study as a thank you for completing the survey.

Note: Please provide your name, title, organization, and the country you represent below.

Name:	
Title:	
Organization:	
Country:	

Question 1: How important are visa policies in your country or region to the following objectives?

	Not at all important	**Somewhat important**	**Very important**
A. Maintaining Security			
B. Controlling the labor force			
C. Regulating immigration			
D. Generating revenue			
E. Achieving reciprocity with other nations			
F. Limiting tourism demand in peak seasons			
G. Other (Please provide details in the field below)			

Question 2: Which of the following visa obstacles do you believe have limited tourism flows in your country or region? Select all that apply and provide details in the fields provided.

	A. Type of visa required	
	B. Denial of visas to travelers from certain points of origin	
	C. Cost of obtaining a visa	
	D. Restrictions on length of stay	
	E. Length of bureaucratic process for visa approvals	
	F. Visa application process limitations (e.g. apply in-person requirements, lack of electronic application, amount of information required, etc.)	
	G. Reciprocal actions in response to visa policies of other nations	
	H. Other (Please explain)	

Question 2 (continued): If you selected C, please identify the visa costs imposed by your country or region which have limited travel flows. Select all that apply.

	A. Less than 50 USD
	B. 50 to 100 USD
	C. 100 to 250 USD
	D. 250 to 500 USD
	E. Greater than 500 USD

Question 2 (continued): If you selected D, please identify the length of stay restrictions imposed by your country or region which have limited travel flows. Select all that apply.

	A. Less than 30 days
	B. 30 to 90 days
	C. 90 to 180 days
	D. 180 days to 1 year
	E. Greater than 1 year

Question 2 (continued): If you selected E, please identify the lengths of visa approval processing time imposed by your country or region which have limited travel flows. Select all that apply.

	A. Less than 1 day
	B. 1 to 5 days
	C. 5 to 30 days
	D. Greater than 30 days

Question 2 (continued): If you selected F, what limitations of the visa application process within your country or region have limited travel flows? These might include the requirement of an in-person application or interview, lack of an electronic application, or the amount of information required to apply, etc. Please provide details in the field below.

Question 2 (continued): If you selected G, what reciprocal visa policies has your country or region implemented which have harmed travel flows, and to what countries of origin have they been targeted? Please provide details in the field below.

Question 2 (continued): If you selected H, what other visa obstacles have harmed travel flows into your country or region? Please provide details in the field below.

Question 3: Please select the travel facilitation benefits each of the following OIC member countries receives from your country or region in the field below.

Arab Countries	Visa-free or visa waiver travel	Visa exemptions by traveler type (e.g. diplomatic, official, business, personal, etc.)	Regional travel agreement	Temporary visa schemes (e.g. visa exceptions for certain seasons, holidays, events, etc.)	Visa on arrival	Electronic visa applications	Eliminate in-person interview requirement	Reduce required documentation	Increased visa processing capacity	Multiple-entry visas	Other
Algeria											
Bahrain											
Comoros											
Djibouti											
Egypt											
Iraq											
Jordan											
Kuwait											
Lebanon											
Libya											
Mauritania											
Morocco											
Oman											
Palestine											
Qatar											
Saudi Arabia											
Somalia											
Sudan											
Syria											
Tunisia											
United Arab Emirates											
Yemen											

Question 3 (continued): Please select the travel facilitation benefits each of the following OIC member countries receives from your country or region in the field below.

Asian Countries	Visa-free or visa waiver travel	Visa exemptions by traveler type (e.g. diplomatic, official, business, personal, etc.)	Regional travel agreement	Temporary visa schemes (e.g. visa exceptions for certain seasons, holidays, events, etc.)	Visa on arrival	Electronic visa applications	Eliminate in-person interview requirement	Reduce required documentation	Increased visa processing capacity	Multiple-entry visas	Other
Afghanistan											
Albania											
Azerbaijan											
Bangladesh											
Brunei Darussalam											
Indonesia											
Iran											
Kazakhstan											
Kyrgyz Republic											
Malaysia											
Maldives											
Pakistan											
Tajikistan											
Turkey											
Turkmenistan											
Uzbekistan											
Guyana*											
Suriname*											

* Guyana and Suriname are in Latin America Region. However, due to the limited number of countries in that region, they are included in the Asian group.

Question 3 (continued): Please select the travel facilitation benefits each of the following OIC member countries receives from your country or region in the field below.

African Countries	Visa-free or visa waiver travel	Visa exemptions by traveler type (e.g. diplomatic, official, business, personal, etc.)	Regional travel agreement	Temporary visa schemes (e.g. visa exceptions for certain seasons, holidays, events, etc.)	Visa on arrival	Electronic visa applications	Eliminate in-person interview requirement	Reduce required documentation	Increased visa processing capacity	Multiple-entry visas	Other
Benin											
Burkina Faso											
Cameroon											
Chad											
Cote d'Ivoire											
Gabon											
Gambia											
Guinea											
Guinea-Bissau											
Mali											
Mozambique											
Niger											
Nigeria											
Senegal											
Sierra Leone											
Togo											
Uganda											

Question 4: What are the top five Non-OIC countries of origin (excluding countries in prior table) from which your country or region receives tourists? Please list them and select the travel facilitation benefits they receive in the field below.

Rank	Country	Visa-free or visa waiver travel	Visa exemptions by traveler type (e.g. diplomatic, official, business, personal, etc.)	Regional travel agreement	Temporary visa schemes (e.g. visa exceptions for certain seasons, holidays, events, etc.)	Visa on arrival	Electronic visa applications	Eliminate in-person interview requirement	Reduce required documentation	Increased visa processing capacity	Multiple-entry visas	Other
1.												
2.												
3.												
4.												
5.												

Question 5: Please provide examples of quantifiable POSITIVE impacts of travel facilitation policy improvements on visits, spending or job creation in your country, region or sector in the field below. (Example: After the adoption of a 30-day travel visa to *Country X* for travelers from *Country Y* in January 2012, the total number of visitors to *Country X* in 2012 increased by 10% over the previous year, and travel-related spending rose by an estimated 15%.)

Question 6: Please provide examples of quantifiable NEGATIVE impacts of visa obstacles on visits, spending or job creation in your country, region or sector in the field below. (Example: By denying travel visas into *Country X* for travelers from *Country Y,* we missed out on roughly 1.5 million visitors in 2013, resulting in an estimated $7.5 billion loss in tourism-related spending.)

Question 7: Which of the following travel facilitation policies does your country or region plan on implementing in the future? Select all that apply and list the countries under consideration in the fields provided.

	A. Visa-free or visa waiver travel	
	B. Visa exemptions by traveler type (e.g. diplomatic, offical, business, personal, etc.)	
	C. Regional travel agreement	
	D. Temporary visa schemes (e.g. visa exceptions for certain seasons, holidays, events, etc.)	
	E. Visa on arrival	
	F. Electronic visa applications	
	G. Eliminate in-person interview requirement	
	H. Reduce required documentation	
	I. Increased visa processing capacity	
	J. Multiple-entry visas	
	K. Other (Please explain)	

Question 7 (continued): If you selected I, list any plans for increasing visa processing capacity in the field below.

Question 7 (continued): If you selected K, list any other plans for future travel facilitation policies and the countries under consideration in the field below.

Question 8: Which of the following travel facilitation policies would you support for your country or region in the future, if not already planned or in place? Select all that apply.

	A. Visa-free or visa waiver travel
	B. Visa exemptions by traveler type (e.g. diplomatic, offical, business, personal, etc.)
	C. Regional travel agreement
	D. Temporary visa schemes (e.g. visa exceptions for certain seasons, holidays, events, etc.)
	E. Visa on arrival
	F. Electronic visa applications
	G. Eliminate in-person interview requirement
	H. Reduce required documentation
	I. Increased visa processing capacity
	J. Multiple-entry visas
	K. Other (Please provide details in the field below)

Question 9: What additional suggestions would you make for improvements in visa policy to help increase tourism flows, spending and/or job creation in your country, region or sector? Please provide details in the field below.

Question 10: What additional suggestions would you make for alternative, non-Visa measures of accomplishing the same or similar objectives? Please provide details in the field below.

Question 11: What are the cooperation opportunities among the OIC Member States with regards to travel facilitation? Please provide details in the field below.

Note: If you would be willing to speak with an economist at Tourism Economics about the topic of travel facilitation, please provide your contact information and check off the box below.

E-mail address:	
Phone number:	
I am willing to speak with an economist at Tourism Economics about travel facilitation:	