



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

## **Effective Tourism Marketing Strategies: ICT-Based Solutions for the OIC Member Countries**



**COMCEC COORDINATION OFFICE  
August 2015**



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## List of Abbreviations

ANAC	Mozambique Department of the Environment
AzCB	Azerbaijan Convention and Visitors Bureau
ASDL	Asymmetric digital subscriber line
BRIC	Brazil, Russia, India and China
COMCEC	The Standing Committee for Economic and Commercial Cooperation of the Organization of Islamic Cooperation
CMO	Chief Marketing Officer
CMS	Content Management System
CPC	Cost Per Click
CRM	Customer Relationship Management
eWOM	Electronic Word of Mouth
GCC	Gulf Cooperation Council
GNP	Gorongosa National Park
ICT	Information and Communication Technology
ITC	Islamic Tourism Centre
ITU	International Telecommunications Union
INATUR	Mozambique Institute of Tourism
JAKIM	Malaysian Department of Islamic Development
KSA	Kingdom of Saudi Arabia
MATTA	Malaysian Association of Tours and Travel Agents
NBI	National Broadband Initiative
NFC	Near-field Communications
NTDC	Nigerian Tourism Development Council
OECD	Organization for Economic Development and Cooperation
OIC	Organization for Islamic Cooperation
OTA	Online Travel Agent
SEO	Search Engine Optimization
TDM	<i>Telecomunicações de Moçambique</i>
UAE	United Arab Emirates
UNDP	United Nations Development Program
UNWTO	United Nations World Tourism Organization
VAT	Value Added Tax
WTTC	World Travel and Tourism Council



## Executive Summary

Technology is playing an increasingly important role in the tourism industry. Within the past ten years, global Internet usage has risen exponentially giving way to a thriving environment of information and commerce. This new landscape has radically altered the way tourism business is conducted by increasing connectivity between consumer and supplier all while creating new opportunities for sales. A new marketplace is evolving that is at once more accessible as it is increasingly competitive.

For years, tourism brands have had high cost barriers to reach tourists. Marketing campaigns focused heavily on traditional print, television, radio and billboard. Tour operators and travel agents served as gatekeepers for destination brands trying to reach the traveling marketplace. With the evolution of the Internet a new era of tourism marketing has provided an alternative to tourism businesses and destinations of all size with considerably less barriers to reaching the consumer. When used correctly the new forms of tourism marketing can be a cost-efficient and effective supplement to traditional means to reaching global target markets.

However, the proliferation of channels has made digital marketing an increasingly challenging ecosystem that is beginning to reapply barriers onto small and medium enterprises and destinations. As the volume of information increases exponentially, tourism providers must be increasingly savvy in the methodologies that cut through the high volume of brand messaging and be found by their ideal consumer.

In addition to being able to develop effective messaging, this rapidly evolving landscape requires an ICT-infrastructure that allows for quick, consistent access to global information network. Business models must adjust to better integrate information flows and must constantly upgrade technology. New platforms and technologies also require their own technical areas of expertise – much of which diverges traditional marketing knowhow. This can place a significant burden on small and medium enterprises as well as emerging destination marketing organizations that lack capital or access to skills.

Tourism demand is rapidly evolving along with the proliferation of the internet. Consumers are seeking more customized marketing experiences tailored to their individual needs and travel behaviors.

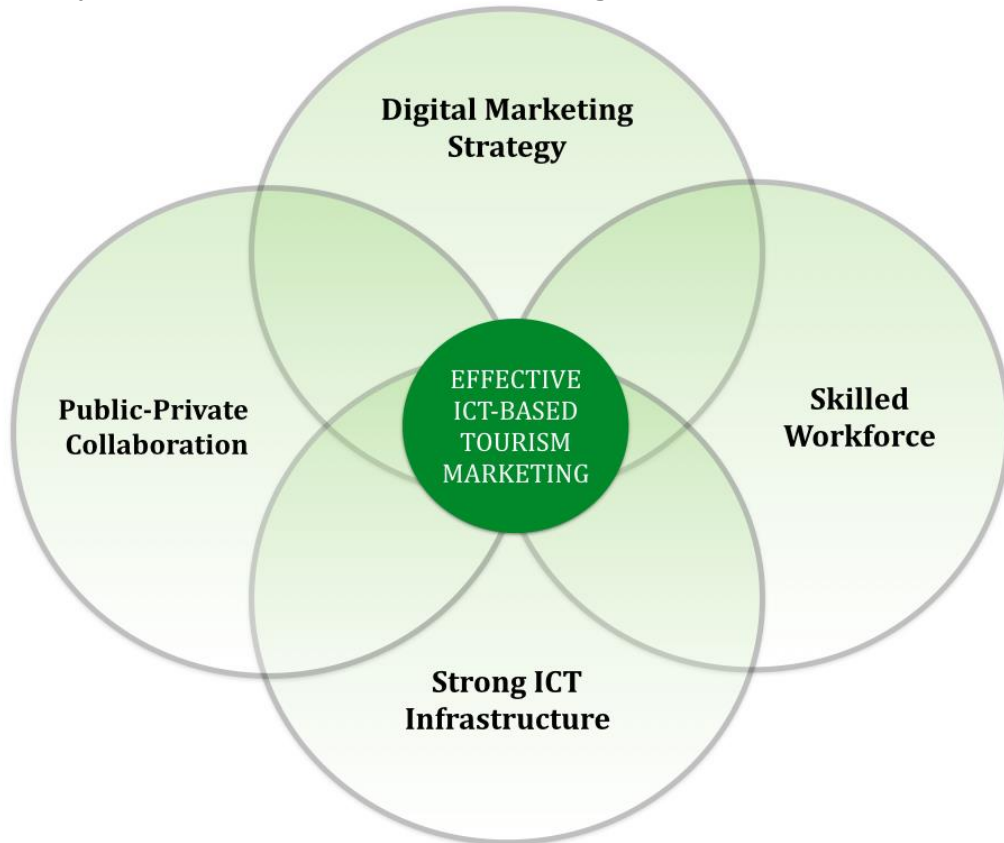
Understanding this landscape, this study is designed to illustrate the elements of ICT-based tourism marketing that contribute to competitiveness for the OIC member states' tourism industries. There are four key elements that have significant influence on ICT-based tourism marketing (Figure 1):

- A **digital marketing strategy** that compliments and is integrated with other traditional marketing activities, touches the visitor throughout their entire travel cycle, features content that is useful to the audience, focuses on the comprehensive experience, and has measurable results
- A **skilled workforce** that excels at writing, editing, design, and analytics
- **Strong ICT infrastructure** with reliable and consistent Internet connectivity alongside affordable and accessible ICT hardware such as computers, smartphones, and WiFi routers.



- A vibrant environment for **public-private collaboration** in order to creatively solve cross-sectoral ICT issues as well as leverage human and financial resources in the activation of marketing endeavors.

**Figure 1: Key elements of ICT-based tourism marketing**



#### *ICT-Based Tourism Marketing in the OIC Member Countries*

The private and public sector in the OIC Member States display wide disparities in application of each of the four main components. Even within regions, some countries demonstrate more proactive use of ICT in their tourism marketing. Overall online marketing is most sophisticated among the public and private sector in destinations where tourism has a significant impact on the economy. A survey conducted on tourism industry stakeholders loosely indicates that perceptions of ICT-based tourism marketing performance among these key factors was highest in the Asia, followed by the Arab group, and then Africa. Though the realities on the ground may vary from country to country, there is a clear desire among tourism businesses and tourism authorities for improvement, most commonly around areas of workforce development and the strengthening of infrastructure.

Asian countries also demonstrate strong skills in online marketing – especially in countries such as Malaysia and Turkey where Internet penetration are increasing the most rapidly. A 2013 Phocusright study indicated that nearly one third of all travel sales are completed online, and tourism businesses are quickly adapting their models from more traditional word of

mouth marketing to “electronic word of mouth”, namely an increased use of social media. Southeast Asia is the most advanced sub-region within the group, supporting strong ICT infrastructure and very sophisticated destination marketing supported by engaging, experience-led content.

The Arab Group represents a broad collection of states that include the highly developed Gulf countries with newly developing destinations in North Africa. Destinations like Dubai and Egypt consistently leverage successful multi-platform marketing with a broad appeal to many international audiences, while digital marketing efforts in Mauritania and Kuwait are relatively weak. E-mail marketing is particularly popular among the Arab countries where it is believed to be a successful channel at building trust in a brand, especially when targeted.

Through improving, the African group demonstrated the weakest performance in terms of all four key elements. Perceptions of the utility of social media remain low and digital literacy programming is not common in primary or secondary education – reducing the availability of skilled professionals to support tourism operations.

Consistent among the private and public sectors in all OIC member states is a desire for closer cooperation between destination authorities and tourism businesses.

### *Policy Recommendations*

The public-sector can help strengthen the online marketing environment through three key areas.

- 1. Building a skilled ICT-based tourism marketing workforce by:**
  - supporting digital literacy education in primary and secondary schools as well as supporting the private sector to establish apprenticeship programs
  - encourage ICT knowledge exchange among tourism businesses and between industries
- 2. Creating opportunities for public-private sector collaboration with:**
  - the establishment of tourism working group that facilitate collaborative solutions of major sectoral issues
  - the development and implementation of a holistic destination marketing strategy developed with the best interest of all stakeholders
- 3. Improving the ICT operating environment through:**
  - reduction of taxes on ICT equipment and services
  - expanded broadband services
  - improved access to ICT for all citizens



Effective Tourism Marketing Strategies:  
ICT-Based Solutions for the OIC Member Countries

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# 1 Conceptual Framework on ICT-Based Tourism Marketing: Trends, Success Factors and Challenges

## 1.1 Purpose of the Study

Technology is playing an increasingly important role in the tourism industry. Within the past 10 years, the number of worldwide Internet users has more than tripled: Currently, approximately 3.17 billion consumers access the Internet with increasing ease and frequency, participating in a thriving environment of information and commerce. This new landscape has radically altered the way tourism business is conducted. A new marketplace is evolving that is at once more accessible to the consumer and more competitive for the supplier.

Tourism marketing is essential for destinations and products to distinguish themselves from competitors and encourage visitation. Traditional consumer marketing for tourism brands has focused heavily on print, television, radio and billboard with tour operators and travel agents serving as gatekeepers between destination brands and potential travelers. The increased accessibility of digital marketing has provided an alternative, cost efficient way for tourism businesses and destinations to reach the consumer. When used effectively, digital marketing can supplement traditional efforts to reach target markets.

Information and communication technologies (ICT) for tourism include devices and hardware (radio, television, Wi-Fi routers, cameras, smart phones, and computers), the software and applications for those devices, and the online platforms and social media networks that connect people and information. A digital marketing strategy operates on multiple channels—to distribute information from producer to consumer.

However, the proliferation of channels and their changing use by creative marketers has made the digital ecosystem increasingly challenging, creating new barriers to successful participation for small and medium enterprises and destinations. Tourism marketers must be increasingly savvy in order to reach target markets. New pay-to-play options on online distribution networks and social platforms are restricting access. Additionally, search engines, which are the single largest driver of website traffic, use specific though opaque algorithms to select which sites appear at the top of search results.

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*The World Economic Forum has articulated that efficient, effective use of ICT among the public and private sector is one of the strongest indicators of tourism competitiveness (2013).*

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In addition to the challenge of developing an effective digital presence in our rapidly evolving landscape, tourism businesses and organizations must have an ICT infrastructure that allows for quick, consistent access to the global information network.

Businesses must keep pace with technology as it changes and ensure that staff has the technical capacity to manage new systems. This can place a significant burden on small and medium enterprises as well as emerging destination marketing organizations that lack capital or access to a technically skilled workforce.

This study is designed to illustrate the elements of ICT-based tourism marketing that are contributing to and can increase competitiveness for the OIC member states' tourism

industries. The study will articulate global digital marketing frameworks that can be deployed by both the private and public sectors as well as operations of any size or budget. Best practices in ICT-based tourism marketing will be introduced with specific examples from the OIC Member Countries and other destinations. Digital tourism marketing challenges will be examined with special attention to the similarities and differences faced by developing and developed economies, large and small institutions. Through this analysis, strategic approaches and policy recommendations will be made that can be implemented to strengthen OIC member states' tourism sector as a whole.

## 1.2 The Global Tourism Demand Context

### 1.2.1 Global Visitation Trends

Tourism continues to be a major contributor to the global economy, increasing each year. According to the United Nations World Tourism Organization (UNWTO), 1.1 billion tourists traveled in 2014, a 4.7% increase from the previous year and the fifth consecutive year with robust growth since the onset of the global financial downturn in 2009. Global tourism receipts from international tourism in 2014 totaled over US\$ 1.2 trillion.

**Table 1: International Tourism Arrivals 2014**

Region	International Tourist Arrivals	International Tourist Receipts (US)
Europe	584 million (51%)	\$509 billion (41%)
Asia Pacific	263 million (23%)	\$377 billion (30%)
Americas	182 million (16%)	\$274 billion (22%)
Africa	56 million ( 5%)	\$ 39 billion ( 4%)
Middle East	50 million ( 4%)	\$ 36 billion ( 3%)

Source: UNWTO

According to the same UNWTO report, experts from major monitoring organizations expect tourism demand to continue to increase by an additional 3–4% in 2015 as a result of improvements in the global economy and decreases in oil prices that have lowered the cost of travel.

### **Emerging Markets**

For over a decade, Brazil, Russia, India and China (BRIC) have experienced economic growth that has contributed to increased spending on travel internationally. Many tourism destinations have invested heavily in marketing efforts targeting these new travel-ready middle classes. However, in 2014 travel spending differed significantly within BRIC countries (UNWTO 2015).

Chinese citizens are experiencing greater relaxation in travel permissions, greater international flight availability and a boom in the number of regional low-cost carriers. These factors have contributed to China becoming the world's largest outbound market since 2012. Trips abroad by Chinese travelers topped 109 million in 2014 while expenditure spiked by 28% (UNWTO 2015).

While outbound travel spending for Brazil and Russia slowed in 2014 as both countries experienced weak economic growth and currency devaluation, India experienced nearly a

30% increase in growth in the first three quarters of 2014. Several emerging markets such as Taiwan, Saudi Arabia, the Philippines, Qatar, Colombia and Poland also demonstrated double-digit growth in their travel expenditures (UNWTO, 2015).

### ***Crisis Elasticity***

While global travel demand increases, violence, terrorism threats, and health crises suppressed tourism growth in effected regions, demonstrating a travel market that is extremely sensitive to safety concerns. While the West African nations facing the Ebola outbreak saw precipitous drops in visitation, other African nations suffered downturns as a result of global misperceptions about the reach of the epidemic. Gambia marked as much as a 65% decrease in year over year visitation in 2014. Farther away and completely unaffected by the Ebola outbreak, Kenya, one of Africa's largest tourism earners, reported a drop of 15% due to cancellations based on health concerns (Vogt, 2015).

Safety related problems and perceptions have marked steady declines in travel to North Africa, including the cancellation of several cruise and tour operations in Tunisia (UNWTO, 2015).

### ***The Sharing Economy***

The precipitous rise of the sharing economy, in which owners rent something such as a room, home or car service via a web-based peer-to-peer platform, has altered how many travelers seek and experience a destination. Two American companies are notable disruptors of existing longtime tourism industry fixtures. The ride-sharing company Uber has displaced traditional taxi and car-hire firms with a smartphone app that connects travelers directly with locals who can provide instant transportation. Airbnb, a company that facilitates room, apartment and even home rentals, has claimed considerable market share from hotels. Airbnb now provides access to over 330,000 rooms globally, making it one of the world's largest hospitality brands (Airbnb, 2015). The "parahotellerie" sector that includes bed and breakfasts, hostels and rentals grew from 35% to 40% of the world accommodation market share over the last five years, a change driven largely by Airbnb, according to IPK International's World Travel Monitor (2014).

## **1.2.2 The Evolution of Tourism Demand**

The process by which travelers make decisions on where they go, how they get there, and what they do (the travel decision-making process) has been described in various ways over the last 50 years. In 1966, Clawson and Knetsch developed a five-phase model to describe the outdoor recreation experience, which was later applied to the travel experience. The Clawson and Knetsch model was further refined by Schmoll in 1977, and van Raaj and Fracken in 1984. Matheson and Wall adapted vacation sequencing models based on consumer behavior in 1982. These models and their many iterations are important because they have helped tourism marketers understand how to frame messaging and dedicate resources to attract the right travelers.

As transportation options have improved and become more affordable, destinations are becoming increasingly interchangeable to travelers (Pike, 2005; Yoon & Uysal, 2003). In this highly competitive landscape, understanding how travelers make their decisions is an essential component of successful tourism marketing and therefore comprehensive destination competitiveness.

Effective tourism marketers recognize that the marketing process is not complete when the traveler has booked and confirmed his trip. What visitors experience at the destination as well as their enthusiasm to share with friends and family upon their return are important opportunities for marketing messaging.

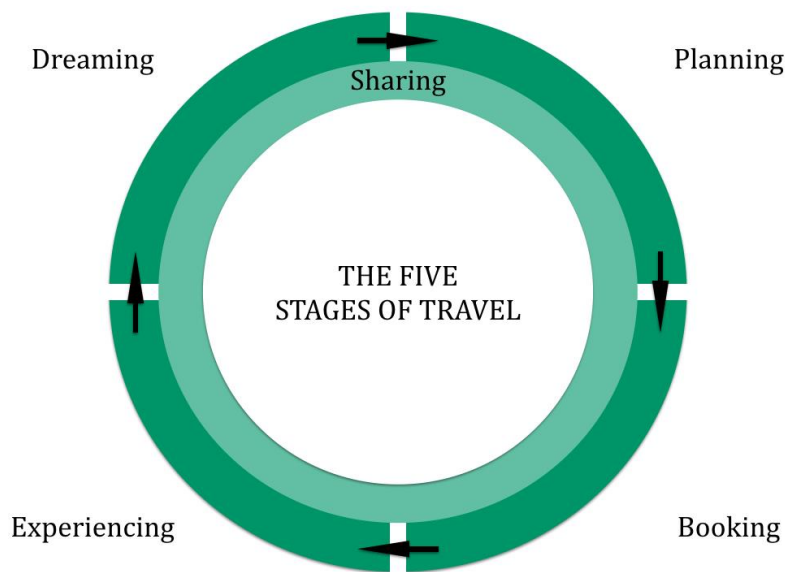
*“A comprehensive marketing framework ... is required to enable ... tourism organizations to take advantage of the new tools and capitalize on social media marketing strategies (Hayes et al (2012).”*

What follows in this section is an illustration of the five stages of travel: a practical framework designed specifically for ICT-based tourism marketing by Google in 2011 and referenced by some of the most sophisticated

digital tourism marketing operations and media (i.e., Tourism Australia, Ogilvy, EyeforTravel).

While the five stages may differ in length and intensity across cultures and within different demographic and psychographic markets, they apply to all tourism endeavors as the basis of a comprehensive and effective digital marketing strategy.

**Figure 2: Five Stages of Travel**



Source: Adapted from Google 2012.

**Phase 1: Dreaming**

Dreaming is the first phase of the travel planning cycle that responds most to inspiration.

This is the most crowded section of the process as destinations and tourism businesses compete in the larger marketplace. Over the past few years, the dreaming phase is the area of tourism marketing that has seen the most innovation, particularly in the online space. The increasing personalization of marketing messages through customized websites, email and targeted social media advertising has allowed destinations and tourism businesses to put the

correct messaging in front of the correct audience. These efforts have proven effective. In 2011, 65% of leisure travelers and 69% of business travelers reported researching online after viewing an online ad. Nearly half of all travelers watch travel related videos, and of those 68% are thinking about a trip and 70% are choosing a destination (Google, 2014).

### Phase 2: Planning

Travelers have become increasingly more reliant on online sources to complete their trip planning including selecting their experiences and narrowing their choices for hotels, operators, and other logistics. 74% of leisure travelers consider the Internet their main source of travel information. The average traveler visits more than 20 travel websites before making a booking (Google, 2014).

This is a key phase for strengthening the relationship with the traveler. Destinations toned to employ messaging to increase the length of stay and build interest to lesser known and visited areas. Tourism businesses should aim to capture the interest of the traveler with the experience they can provide rather than the price alone, i.e., utilizing experience-based marketing to compete for business.

### Phase 3: Booking

According to Google (2014), 37% of travelers said the Internet was the primary source prompting them to book (Word-of-mouth, at 16%, was the second most important factor to influence bookings.)

This phase is important for marketers because it is the opportunity to convert a potential traveler into a future arrival or sale. However, this may be the most difficult step. A September 2014 SaleCycle survey identified that 81% of travelers abandon bookings online. Of these, 39% of travelers feel they needed more planning, 37% abandon the booking because they want to better compare prices, and 13% abandon the booking because the checkout process is too complicated.

Last-minute reminders and inspirational content will motivate a traveler to finalize a booking. The security and ease of this process matters because it sets the tone for the travel experience.

### Phase 4: Experiencing

Tourism marketing does not end once the visitor has arrived. Online technology plays an important part in ensuring that the visitor is informed about activities, attractions, and resources. The increasing prevalence of Wi-Fi, the strengthening of mobile networks, and innovations in near-field communication (NFC) technologies have created an environment in which tourism marketers can remain connected with travelers to strengthen the experience and drive additional sales.

Having frequent and dependable Internet access is important to most travelers. 53% of leisure travelers and 70% of business travelers have used a mobile device to find travel-related information. Increasingly, tourism-related queries are coming from mobile devices—nearly 20% for hotels and 12% for air transport (Google, 2012).



### Phase 5: Sharing

Word of mouth (WOM) is often cited as the most reliable form of marketing (Nielsen, 2013; American Marketing Association, 2014.) In fact, with the rapid advancement of technology (and the marketing techniques alongside them), word of mouth remains the only consistently effective and trusted mode of marketing (Google, 2014; TNS Global, 2014 Ogilvy, 2014). Destinations and tourism businesses can maximize marketing reach by encouraging visitors to share their memories. 53% of leisure travelers and 52% of business travelers say they share pictures of their journeys online. (Google, 2012).

According to McKay and Vogt (2012), “Technology use at home, work, and in transit contexts is habit forming” and has driven the omnipresent use of smartphones, tablets, and laptops in almost every venue in most global locations. “Conspicuousness” is part of the travel experience for many markets—especially for Millennials and travelers in upwardly mobile income brackets. Connectivity and social media play an essential role in supporting this trend and using it to facilitate eWOM.

### ***Growth of Niche Markets and Specialized Interests***

The Internet and more recently social media, have accelerated fragmentation of demand. Interests, preferences, and tastes for nearly everything, including travel, have become highly specialized, and so too have the strategies for marketing to these specialized niches (Morrison, 2014).

Some of the fastest growing niche markets include adventure travel, eco-tourism, culinary tourism, educational tourism and wellness travel; however there are many more markets that could be segmented infinitely depending on the level of specialization desired. Specialtytravel.com, an online directory, lists over 300 different interest and activity areas as

diverse as astronomy, bison viewing, military history, and women’s tours.

*Niche markets are attractive for small and medium-sized tourism businesses that otherwise are forced to compete in scaled economies where larger cash and connectivity have advantages (OECD, 2000).*

Tourism businesses and destinations are capitalizing on these lucrative markets by

creating marketing strategies that speak to the market’s profile by using tools such as relationship management, customization, narrowcasting (disseminating information to a small audience defined by special interest or geographical location), earned media, and interactivity. These targeted strategies can deliver positive messages about a destination and measure the impacts of messaging and marketing efforts.

## **1.3 ICT Infrastructure and the Role of Government**

ICT provides broad benefits to a society by creating an enabling environment that can boost competitiveness in multiple sectors by spurring innovation, strengthening business operations, increasing worker productivity and strengthening local value chains (European Commission, 2013). Countries that do not prioritize a modern, reliable ICT infrastructure – open to competition wherever possible - risk being left behind economically (ITU, 2011).

The following are key areas of government responsibility in the development, maintenance and improvement of ICT infrastructure that have significant impact on the effectiveness of destination marketers and tourism businesses. (OECD, 2009; UNDP, 2007; ITU, 2014)

*Government perception to the importance of ICT*

- Awareness of the value of ICT among policymakers
- Prioritization of ICT infrastructure development relative to other matters of state
- Collaboration between lead ministry and other ministries that are impacted, such as education, health, trade and industry

*Civil Society Engagement*

- Government provides opportunities for public engagement around ICT needs

*Technical Infrastructure (Phone, Internet)*

- Networking availability, including hard-wired broadband and satellite access availability
- Telephone connectivity
- Mobile data coverage and signal strength

*Human Capacity and Workforce Availability*

- Digital literacy among primary and secondary school students
- Career gateways for telecommunication professionals
- Facilitation of internships and apprenticeships for digital specialists

*Regulation of Telecommunication Providers*

- Privatization of Internet service providers
- Investment incentives for telecommunication providers, especially to those providing service in rural and remote areas

*Access to Technology*

- Reduction of import levies on technology

## **1.4 ICT Tools and Initiatives for Tourism Marketing**

The following sections introduce key components of the digital marketing environment and provide examples of global best practices. The focus here is to provide an overview of the most recent trends that affect the tourism industry and to highlight effective methodologies for OIC tourism businesses and destinations.

### **1.4.1 Branding in the Online Landscape**

Tourism brands are more than logos and taglines. They are the composite sentiment that

*Digital tourism marketing is most effective when it is an extension and activation of a strong brand that can be activated online and offline (European Travel Commission and World Tourism Organization, 2014).*

others feel about a destination—a positive, negative, learned, or observed understanding of a place. Most people form opinions of a place or product based on what they've seen on TV or heard from a friend.

While it is impossible to completely control a brand, it is possible to positively influence it. A tourism brand is its personality and its promise. It is developed over a long period of time by creating positive associations between the destination or company's best assets—tangible and intangible—and the potential traveler.

Key tourism brand components:

- **Brand Promise:** A simple statement that guides all marketing messages
- **Brand Values:** Intangible, unique qualities or selling points that distinguish the brand from competitors
- **Brand Messages:** Key stories to be communicated to the audience
- **Brand Identity:** The visual elements of the brand, including the colors, design, logotype and name

A brand strategy is a long-term plan to strengthen positive associations around a select set of images, colors, phrases and emotions. This strategy provides the structure for all marketing activities, ensuring that the messaging and methodologies employed to attract visitors are consistent. Consistency reinforces, enhances, and strengthens the brand in the long term.

ICT-based tourism marketing solutions have an increasingly important role in extending the brand and creating brand equity. Billions of opinions and observations are shared on online platforms. These conversations are the currency of online media and are often used as key metrics for ICT-based tourism marketing.

Digital marketing strategies use intriguing content (see Section 2.2) and enlist online influencers (see Section 2.4) to generate conversations around the brand and to create brand advocates who will build additional positive recognition for the destination or business.

#### 1.4.2 Content Development and Management

Content is the main driver for tourism marketing. The creation, aggregation and distribution of creative, fresh and engaging text, imagery and video is at the very core of successful ICT-based tourism marketing.

*78% of major chief marketing officers see custom content as the future of marketing (DemandMetric, 2014).*

As mentioned throughout Section 1.5, content-driven marketing is the most cost-efficient and effective form of marketing. However, content development is often the most burdensome component of a tourism marketing campaign. Planning ahead and thinking strategically can create long-

term efficiencies in aggregating, developing and distributing content that will be used across all ICT-based tourism marketing platforms. Now more than ever, quality content is defined as that which simply meets the needs of a specific target audience.

### ***What is Content?***

*Static content* is the foundation for online properties such as the website and key informational gateway wikis. Static content contains basic, rarely changing information including boilerplate descriptions, logistical facts, FAQs, policies, rules and regulations.

*Dynamic content* is evolving content relevant within a certain time frame. For tourism marketers, dynamic content can be updates about new attractions, information on deals or sales, new videos, social media posts, and reactions to current trends.

Visual content is becoming increasingly important to online users. The human brain has been wired to more quickly and deeply absorb visual messaging, according to the Center for Cognitive Brain Imaging. Marketing content featuring compelling images averages 94 percent more total views than content with just text. The total number of online views of press materials directly correlates to the number of multimedia elements contained within (MDG Advertising, 2012). However, it should be noted that visual content must be part of a larger content strategy.

Content is developed in a variety of ways depending on budget and staff availability. It can be outsourced completely to a public relations firm or created in house. For small and medium enterprises lacking resources or knowhow, curated content—that is, content that is pulled from other content creators and assembled into a new piece of content for a specific audience—often supplements custom content. User-generated content is that which can be pulled from comments and posts by visitors or previous clients about the destination or business.

### ***What is Good Content?***

Because digital marketing platforms appeal to a variety of groups and are significantly less expensive to access than traditional media such as newspapers, magazines, television, and radio, digital marketing content can be much more adaptable and varied for a lower cost. As niche markets seek more specific information, tourism marketing requires a more customized approach.

A review of literature from leading digital marketing strategists, public relations firms, etc., reveals consensus around the following characteristics for effective digital marketing content:

Example: Target Market Persona:

#### **Germany - Young Adventure Traveler**

**Profile:** This young German traveler is seeking adventure. He wants a destination where he can enjoy nature, scenery, outdoor activities, and sporting adventures. He is attracted to low-key destinations that are comfortable, open and progressive. He is seeking value—one diverse destination where he can affordably explore multiple activities. He would be interested in Wadi Rum, Red Sea diving, rock climbing, desert trekking, wildlife and sustainability. He also values culture and community.

#### **How To Reach This Visitor: Niche Marketing**

Although he is less likely to plan in advance, he will be engaged by interesting travel writing, social media, aspirational photos, and word-of-mouth recommendations from other adventure seekers. Reaching out to and partnering with niche markets like rock climbing groups or adventure travel bloggers with curated destination content could attract this type of visitor. Engaging influencers through niche marketing is an important factor in enticing adventure travelers who are usually well-educated on the products within a destination.

**Key Messages:** Adventure, Nature, Scenery, Sports, Sustainability, Authenticity

- **Compelling:** Immediately relevant to a target audience, adding value to their lives and pushing them to follow up by reading additional content, clicking on a link or sharing with another user.
- **Trustworthy:** Developed from a reliable source without false promises or expectations
- **Efficient:** Conveys a message in the right format in the clearest, most concise manner possible to reduce production and display costs while supporting quick consumption by the target audience.
- **Accessible:** Can be consumed on the intended ICT device without unnecessary difficulty

### ***The Importance of Target Personas***

Identifying target markets is a marketing fundamental that sets the context for being able to market a product or place. Typically this begins with understanding the demographics of those markets such as geographic location, gender, income, and family status as well as psychographics such as behaviors and interests. However, the social nature of digital marketing requires marketers to go beyond standard targeting and segmentation to understand the complex motivations of the audience that the destination or business is trying to attract.

Developing target traveler persona profiles assists in strategic content creation by allowing the marketer to think about the psychology and behavior of one or more ideal travelers that will respond to a product or place. A persona profile can be developed by answering the following questions about the ideal visitor:

- What are his or her personal values?
- What are his or her day-to-day interests?
- By what are they most inspired?
- What kind of person do they aspire to be?
- Who are his or her motivators or influencers? Who does he or she trust the most?
- Where does he or she go first for information? Where does he or she go second?
- What are his or her online habits?
- Which devices does he or she use regularly?
- What information or inspiration does he or she need to make decisions?
- How does he or she like to travel?
- Which keywords would he or she use to find your product?

### ***Collaboration***

Partnerships are a valuable tool for helping to acquire and distribute content. In addition to mitigating the time and cost to generate content, a co-marketing partnership allows the destination or the tourism business to increase content exposure and leverage a new market.

One clear opportunity for co-marketing is the relationship between destination-level authorities and the tourism business. Destination-level content is valuable to hotels and tour operators because it supports their marketing efforts at the dreaming and planning stage—educating and encouraging potential markets about the value of the product. For destinations, specific information about accommodations, attractions, and tours creates a tangible way for visitors to plan their experience at the destination.

### 1.4.3 Website Management

Websites are digital storefronts for destinations and tourism business. They can drive visitation through inspiration, information, and e-commerce. Most importantly, the website is the home to the brand and a focal point for the visitor to engage with the destination or the business. The following are a number of evolving trends in tourism website management, both in term of functionality and in design:

#### ***Blogging***

Adding new content to a website on a regular basis is an opportunity for users to engage and re-engage with a website rather than use it as a static reference for attractions and services.

Tourism website blogs are a key provider of dynamic content: 57% percent of companies with a blog have acquired a customer from their blog; 81% of businesses report that their company blog is “useful to critical” for their business (Anderson, 2013). Blogging is an integral part of any content strategy for several reasons. Adding a blog to a website is also an important factor in search engine optimization (SEO), ensuring that the website is seen as an authority by Google, Bing, Yahoo and other engines.

Integrating video into blog posts is a great way to inspire and delight the audience. In addition, it can improve SEO as Google’s algorithm for ranking results function is highly influenced by the inclusion of video content.

#### ***Design Trends***

Smart website design is built off of the larger needs of the brand. The following are the most common design trends for tourism websites mentioned in best-practice documents from surveyed website design firms, tourism marketing experts and public relations agencies:

- Scrolling: Eschewing the traditional multipage format that requires multiple clicks to navigate, scrolling websites allow the visitor to explore content effortlessly, moving from from top to bottom without having to wait while new pages load.
- Big images: Tourism is a highly visual industry, and as load speeds increase, tourism brands have begun to use richer imagery on websites to captivate and inspire their audiences. Using slideshows is an effective way to rotate images and engage viewers.
- Upwardly responsive: Mobile responsiveness allows web design to format for smaller devices, while upward responsive websites focus on larger screens like iMac desktops and televisions.

#### ***Personalization***

Personalization is a larger trend in tourism management with travelers expecting more options, unique treatment, and a customized experience throughout the entirety of their journey (Davenport, 2013). This trend extends to website experiences.

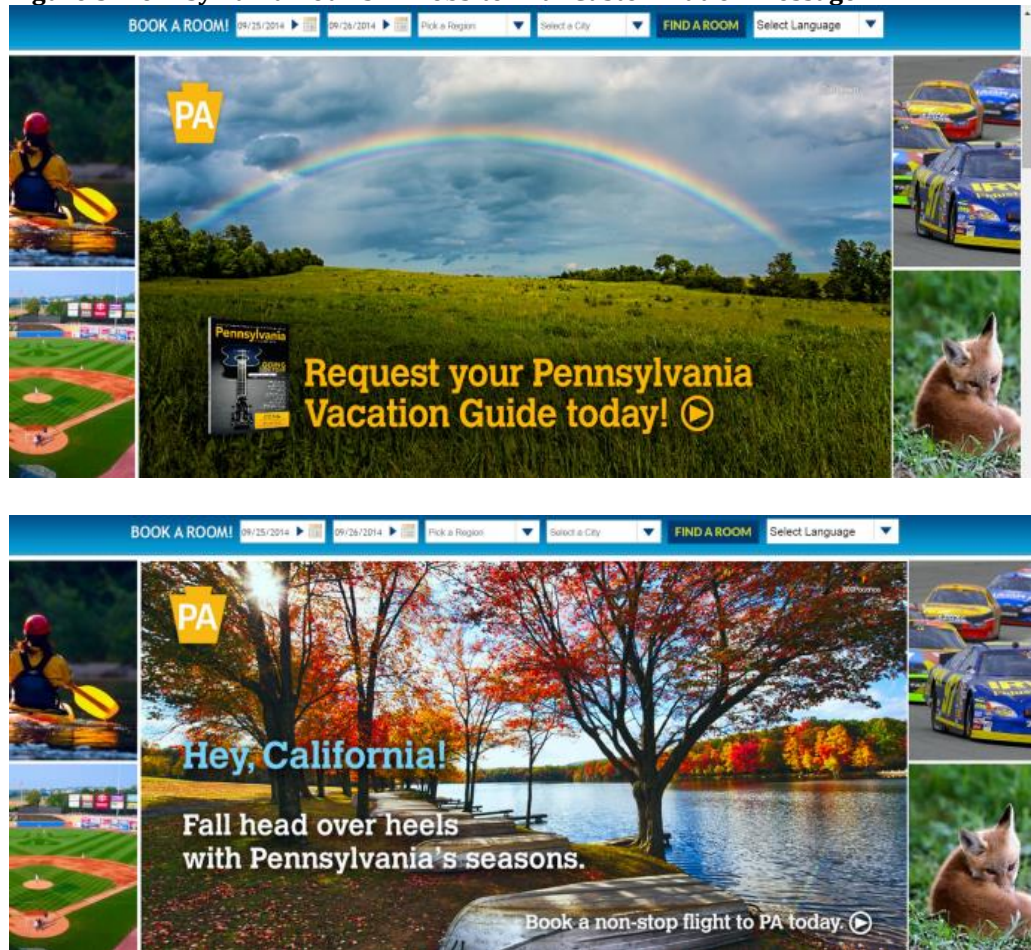
Fact: 94% of marketers and 90% of agencies agreeing that “personalization of the web experience is critical to current and future success” (Econsultancy and Monetate, 2013).

Website management technologies provide the capabilities for tourism brands to display

unique content based on received user data. For example, Figure 4 depicts Pennsylvania Tourism’s homepage with personalized content for a user from California. A simple personalization methodology is to create distinct landing pages based on links that are distributed through social media and other networks. For instance, <http://www.destination.com> can easily become <http://ecotraveler.destination.com> and host specific content about nature-based tourism experiences.

More advanced website design can integrate software specifically designed to review a set of parameters to determine custom content on the homepage.

**Figure 3: Pennsylvania Tourism Website with Customization Message**



### ***Websites for Lead Nurturing***

Websites are a valuable point of sale for tour packages, room nights or tickets to attractions. However, the decision-making process can be significantly longer than other products or services. Studies have demonstrated that potential travelers may visit an average of 38 sites over the course of 45 days prior to purchasing (Expedia Media Solutions and Milward Brown Digital, 2014). Converting browsers to buyers can be aided through a proactive lead nurturing process. Integrated software can collect user data and deliver customized content to keep the destination or service top of mind and drive the customer towards a booking.

Integrated customer relationship management (CRM) approaches track a user by installing cookies or collecting an email address that triggers the creation of a user profile. As the user interacts with the website by downloading an e-brochure or logging into an itinerary builder, information is added to his profile. The user profile is then qualified as a “lead” for sales by a set of qualifications and scores established by the business or organization. A touch-point map illustrates the content and outreach that will follow to keep the potential buyer engaged. Based on qualifications, automated emails may be delivered.

#### **1.4.4 Social Media (eWOM)**

Social media is an extension of traditional word-of-mouth marketing (WOM) that has been known to marketers for years as having a significant impact on consumers’ decision making process and satisfaction (Katz and Lazarfield, 1955; Richins 1983; Bone 1995). Social media has grown in popularity over the past 20 years to become an integral component of a competitive tourism marketing strategy. It is sometimes referred to as electronic word of mouth (eWOM) because of the way that information travels and the impact it can have on behavior (Gruen et al, 2006).

The volume of global social media users has increased exponentially marked by a simultaneous increase in the level of activity in terms of content that circulates across all platforms (Morrison, 2014). Social media platforms are increasingly sophisticated, improving analytics and their ability to hyper target users. This has resulted in a marketing process for the tourism industry that can be both more efficient and more effective than traditional marketing. (Edelman, 2010).

When used effectively, social media has several valuable outputs (Kiralova and Pavlickeka 2014):

- Building initial awareness of a destination or a tourism service
- Improving a destination’s image or managing a negative image during a crisis
- Encouraging visitors to plan a journey and keeping a destination or service top of mind
- Facilitating sales through awareness of deals and discounts
- Influencing travel behavior by generating awareness of additional attractions or services

There are more than 1,000 active social media platforms currently being used around the world. Each is home to a thriving community of dedicated brand advocates—individuals who wish to stay informed and engaged about the brand. These brand advocates are potential supporters of a tourism brand and a word-of-mouth communication channel.

The following sections briefly introduce the major social media platforms used by the tourism industry and provide insight on significant recent transformations that have impacted how they are being used as a marketing platform.

#### **Facebook**

Facebook is the world’s most popular social media platform with over 1.5 billion followers. It has been an invaluable resource for tourism marketers for almost 10 years, mainly because it



is seen as a low-cost platform to consistently deliver content. In 2012, Facebook reviewed its content and noticed that 42% of all posts were travel related.

However, the ability to achieve organic (unpaid) reach with viral or shareable content is slowly dwindling as Facebook attempts to monetize its platform. Additionally, the amount of content being created is overtaking the amount of content that can be consumed. Over the course of the past three years, Facebook has altered its design from delivering users all of the content from their entire network of personal and brand contacts to a curated set of content based on an opaque algorithm supposedly attuned to the users' interests.

Brands can boost the viewership of their content through a variety of sophisticated paid strategies that can hyper-target the delivery of each Facebook post based on demographics, interests, and habits. Figure 5 illustrates a sponsored post from the U.S.-based tour operator The Clymb featuring discounts on tour packages.

**Figure 4: Sponsored Facebook Content**



However, public relations professionals are predicting the end of organic reach for brands, that is for content to flow rapidly among users without an advertising spend. The term "reachpocalypse" refers to this imminent shift affecting social marketing. According to Sweeney PR (2012), which has been tracking the decline of organic reach, 17% of Facebook fans received posts through unpaid distribution in September 2012. In; February 2014, overall reach decreased to 6% and 2% for pages with over 500,000 followers. The firm predicted organic reach to approach zero by the end of last year. Other social media experts are expecting zero organic reach to occur this year.

The key lesson is that now tourism brands must consider a Facebook strategy that blends organic and paid content. For travel brands, Facebook is moving from being a purely sales and advertising platform to one that

- Rewards brand loyalty by offering special deals and discounts with promo codes and unique links,
- Provides customer service by answering consumer inquiries and comments
- Serves as a cross-platform gateway by highlighting activity on Instagram, Twitter and YouTube,
- Captures contact information through specialized apps that can be used for future email marketing,
- Offers a snapshot on consumer needs and desires that can be filtered into further marketing initiatives.

### **Twitter**

For many years, Twitter was the world's fastest growing social media network. The 140-character "mini-blog" played important roles in both brand and political revolutions. Currently, there are more than 300 million Twitter followers with over one billion conversations happening every 48 hours.

Twitter is a favorite travel companion; about a third of users access Twitter before or after a trip, while 39% use the platform mid-journey. And nearly 20% of users Tweet to share feedback throughout their travel experience. Because it's used at every stage of the travel process, Twitter can help brands develop strong relationships with consumers (Twitter, 2014).

For many years, Twitter was confined only to text, however over the past two years the platform has become more visual. In late 2014, Twitter introduced Twitter Cards that allow tourism marketers to embed specific actions for target audiences such as:

- Register at a website
- View and use coupons
- Visit a particular landing page
- Download an app
- Sign up for an email list.

This deep linking has tangible benefits for the travel and tourism brands including:

- Promotions of packages or deals with direct links to e-commerce landing pages or mobile apps
- Building additional brand equity through larger imagery or gallery-style imagery
- Increasing participation in social contests with the integration of video
- Enhances monitoring and evaluation

Twitter Cards are a significant modification of the traditional text-only style for which the network became famous. However, Twitter content will only be seen by a network that has been created organically.

Much like Facebook, Twitter has begun to monetize its platforms by offering various levels of guarantee that a brand's content or account will be seen among target audiences. "Promoted Tweets" can be targeted at users based on keyword, interest, gender, device type and

geography. This can be advantageous for travel brands seeking to target niche markets and particularly cost effective for tourism SMEs at \$0.50–\$2 per engagement, depending on target audience. “Promoted Accounts” recommends the entire brand account to a particular target audience and costs approximately \$2.50–\$4 per new follower. Finally, Twitter’s most visible promotion opportunity is a promoted trend that provides worldwide awareness for a set amount of time.

In order to attract summertime visitors from within the U.S., the Las Vegas Convention and Visitor’s Bureau purchased the rights to become a 24-hour exclusive promoted trend on Twitter. LVCVB complimented its 24 hours of paid promoted trend time with real-time content creation. It made videos in Chicago that included people singing about Las Vegas outside a famous baseball stadium. Both the paid promotion and the real-time content used the hashtag #VegasSeason. In those 24 hours, @Vegas was mentioned three times more than average while followers increased at a rate of eight times the typical amount. The LVCVB used the increased reach provided by the promoted trend window to push organic content much farther than its typical reach, generating 46 million trend impressions and 3,365 mentions of #VegasSeason (Shankman, 2014).

### ***YouTube***

The video-sharing website YouTube boasts more than 1 billion users watching hundreds of millions of hours every day. YouTube has become increasingly important in light of the dramatic shift towards visual content marketing. Views of travel-related content have increased an average of 118% year over year with nearly 30% of videos viewed on a mobile device. 65% of leisure travelers viewed travel-related videos when thinking about a trip, 48% when thinking about what kind of trip to take, and 61% when choosing a destination (Google, 2014).

Thoughtfully-produced high-quality video content can be a significant lead generator. According to Google, and in line with the shift to storytelling as marketing, YouTube’s parent company has noted that “travelers want to do more than just watch videos; they want to connect with creators and brands.” In 2014, subscriptions to top travel channels on YouTube increased 106%. Users are more interested in personal stories about travel (“vlogs”) and less interested in content from official providers. Experience-led content, particularly videos about food and sports, is also successful in attracting viewers.

There are other videos sharing platforms such as Vimeo though none of these have even a fraction of the reach that YouTube has.

### ***Instagram***

Instagram is an online mobile photo-sharing service that currently has more than 300 million members. It is a favorite of tourism marketers who are now using more visual content to promote destinations, activities and amenities. As Facebook becomes a less competitive platform, many tourism brands see Instagram as an alternative for sharing visual content.

A 2014 Forrester study demonstrated that Instagram generated 58 times more engagement per follower than Facebook. Forty-two percent of brand marketers plan to increase their use of Instagram in 2015 as global usage continues to grow (Elliott, 2014).

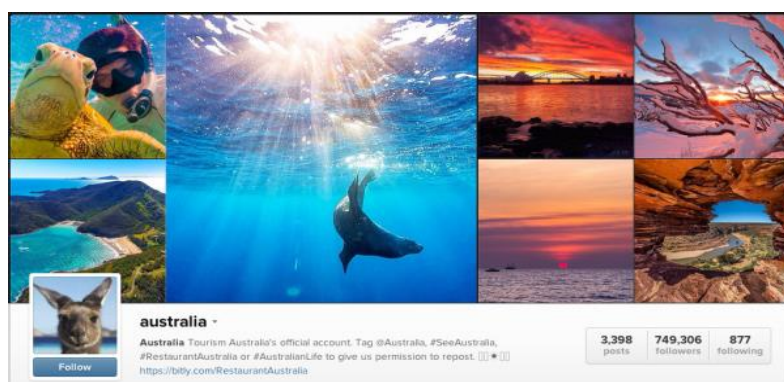
While Instagram has a push component with brands delivering images to users' feeds, the Instagram community also relies on hashtags that relate to a particular subject matter. Tourism brands can repurpose these images within Instagram streams or across other social media platforms. Like on Facebook, travel images have a large impact on Instagram.

*45% of frequent Instagram users found travel-related Instagram activity to be the most appealing, and 47% stated that they had been motivated to visit a place because of a post they saw on Instagram (Kindai, 2014).*

Australia Tourism has one of the travel industry's largest Instagram followings at over 1.5 million. Users that include @Australia and #SeeAustralia in their post have the chance to be one of six daily "re-grammed" photos by Australia Tourism's account (seen in Figure 6). This is appealing for Instagram users seeking exposure and recognition. In an interview with Skift published in May 2015, Tourism Australia's director noted that this focus on user-generated content, which is part of their "World's Largest Social Media Team" strategy, has proven to be a cost-efficient and effective strategy, garnering significant reach and viewership for the destination without the need to invest heavily in original content development.

In 2014, Instagram strengthened its capabilities to feature short videos, taking significant market share away from Vine, and the previous leader in the micro-video space. As the platform builds influence, it has also seen the introduction of paid content, however the large price tag makes it out of reach for most small and medium-sized enterprises. Some experts believe this will be changing soon as Instagram attempts to build a hyper-targeting advertising platform similar to Facebook's (Vermeren, January 2015).

**Figure 5: Australia Tourism Instagram Samples**



### **Pinterest**

Pinterest is a visual bookmarking tool with over 40 million monthly active users. The visual archive that it creates is most useful for tourism business and destinations in the dreaming phase of the tourism cycle. It is most useful with actionable content such as an itinerary that can be purchased, a campaign for participation, or discounted products that are being offered.

With the development of a new “Pin It” button that can be integrated into content sharing bars on websites and other platforms, Pinterest is expecting to see increased growth in its traffic as the process becomes more simplified.

### ***Reaching the Chinese Market via Social Media***

China is somewhat of an outlier for social media due to the Chinese government’s restrictions to access. However, that is not to discount the fact that China has one of the most vibrant and dynamic social environments. China’s several unique social media platforms often outpace the other global platforms in terms of their technological functionalities (Chiu et al, 2012).

Chinese platforms are also highly fragmented with different followings and geographic priorities, and content crowding is a regular problem as artificial writers often develop automated content about individuals and businesses. Tourism organizations that have identified China as a target market often seek the specialized assistance of Chinese digital marketing specialists that best understand the intricacies of each platform and can help develop a customized strategy (Hanover Research, 2013).

### **1.4.5 Email Marketing**

Email marketing is one of the travel industry’s most effective forms of digital marketing. E-newsletters and e-blasts can keep a destination brand or product top of mind for recipients.

E-mail marketing is an important compliment to social media. While some social media streams may be missed by the intended audience, – email marketing is delivered directly, which results in a higher chance of viewership. According to the Direct Marketing Association, email marketing is the most cost-effective form of e-marketing, often presenting a higher ROI than other platforms. Email marketing is powerful because it can deliver a clear call to action to a target audience, driving readers to social media sites, back to a website, or to a special event.

*Nearly half of all emails are opened on smartphones and tablets, a 500% increase in four years (Jordan, 2015).*

Additionally, email marketing software can fully integrate rich media and can be completely customized for each target market. Experian’s 2015 research on email marketing in the travel industry noticed that emails

with dynamic content in the subject line have a 25% better open rate and a 38% better click rate. Like all other platforms, mobile is starting to dominate email.

### ***Air New Zealand ‘Personality Allowed’ Campaign***

In 2013, Air New Zealand launched a successful email campaign that maximized best practices in customization and lead generation (Marchione, 2013). The air carrier sent personalized pre-flight and post-arrival emails (seen in Figure 7) to its passengers. Pre-flight emails included imagery of the upcoming destination, a weather update, and flight details, as well as a photo of a flight crew member who will be on the recipient’s specific flight. The post-arrival emails included a link to the company’s MyVoice program, which housed customer information that was a resource for Air New Zealand’s email program.

Program Achievements:

- Pre-flight email unique open rate: 69%; unique click through rate: 38%
- Post-flight email unique open rate: 62%; unique click through rate: 40%
- Thousands of social media posts

Figure 6: Air New Zealand's Use of Customized Email Marketing



### 1.4.6 The Digital Frontier – SmartTV and Wearable Devices

Smart TV and wearable devices are new technologies that many believe will have significant promise for ICT-based tourism marketing.

#### Marriott International and Apple Watch

Marriott International's rewards members can now access the company's mobile app on the Apple Watch. Rewards members can check in and out of rooms, receive room ready notifications, and find directions to their hotel within the app on their watch. The company views this new technology as a means to provide better service while putting guests in control of their experiences. The program launched on April 24, 2015 so results are limited thus far.

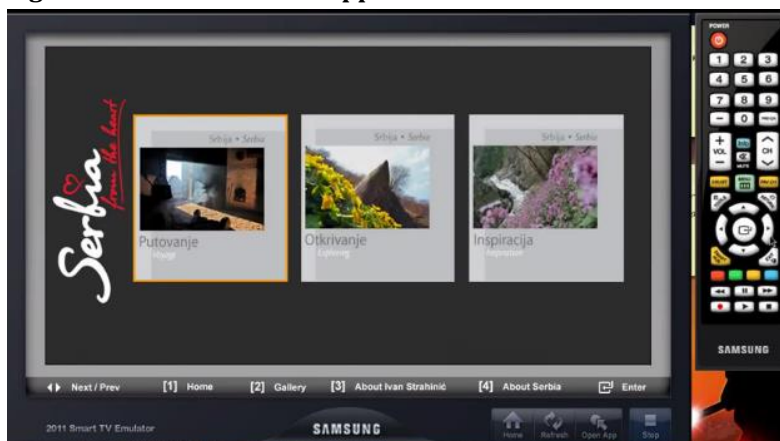
#### Virgin Atlantic and Google Glass & Sony Smartwatch

Virgin Atlantic has recently deployed Google Glass and the Sony Smartwatch to enrich the passenger experience at London's Heathrow Airport. Staff members wearing one of these devices greet the traveler at check-in, receiving traveler information through the technology. Check-in times have decreased as airline staff have been able to scan passports and boarding passes more quickly, and the program has received positive feedback thus far.. Virgin Atlantic plans to use the technology more widely over the coming years. (Hutchinson, 2014; Speight, 2014).

### Serbia and Smart TV

Much like a smartphone is to a phone, a Smart TV adds a new interface to a TV that allows users to access the Internet and interact with specific content through apps. Perhaps the biggest promise for Smart TV is its ability to integrate marketing content and e-commerce directly into television programming. For example, a potential traveler could see a destination mentioned on their favorite show, click for more information, and purchase a holiday in one step. Destinations can build apps, their own TV channels, or blogs containing pictures, movies, comparable prices, and opinions all visible on the Smart TV from the comfort of a viewer's couch. The Serbian Tourism Board became one of the earliest adopters of this technology with its Smart TV app Serbia From the Heart, which showcased the destination through vivid imagery. (see Figure 8)

**Figure 7: Serbia Smart TV App**



#### **1.4.7 Public Relations and Online Media**

Because of the high volume of content and the specialization of audiences, public relations and media management techniques have changed in the digital age. Bloggers and influencers can have as much—if not more—reach—than traditional journalists as a large percentage of print media is replaced by digital content. Tourism businesses rely on online media producers to access communities that fit within their target personas.

Relationships must now be built organically with online media personalities and require a considerable amount of research and engagement. Many online marketers follow their target online media personality through Twitter and use tools like Twitter Grader, Muck Rake and Journalists tweets to identify real-time conversations. Batchbook is a paid service that helps public relations professionals track digital conversations (such as emails) with media influencers.

Bloggers, online journalists and influencers are inundated with requests, press releases and press kits. Customization and specification is an important way for the tourism business to cut through the clutter and differentiate its product.

## 1.5 Measuring Digital Marketing Success

The end goal of most tourism marketing for destinations, hotels, and tour operators is to attract visitors. While tracking sales and bookings will remain important, ICT-based tourism marketing solutions allow a more nuanced approach to measuring success and return on investment. In the current ICT-based marketing landscape, intangible results can be just as valuable as hard sales. Key areas of measuring success include:

- Involvement (Do people know about you?)
- Interaction (What are they doing?)
- Intimacy (What do they say?)
- Influence (Who do they tell?)

Online software now makes it easy to measure conversations about a tourism brand and monitor the sentiment.

The following are some of the most popular platforms for measuring online perceptions:

1. Meltwater: Assess the tone of the commentary as a proxy for brand reputation and uncover new insights that help you understand your target audience.
2. Google Alerts: A simple and useful way to monitor search queries. Track content marketing and receive regular email updates on the latest relevant Google results. Useful for tracking influencers, trends and competitors.
3. People Browser: Analyze sentiment and monitor brand mentions.
4. Google Analytics: A powerful tool for tracking website traffic. Create custom reports, annotations to keep uninterrupted records of your marketing and web design actions, as well as advanced segments to breakdown visitor data and gain valuable insights on their online experiences.
5. Hootsuite: Free software that supports managing and measuring multiple social networks.
6. Facebook Insights: An integrated measurement component that provides an overview of total page Likes, number of fans, daily active users, new Likes/Unlikes, Like sources, demographics, page views and unique page views, tab views, external referrers, and media consumption.
7. Social Mention: The social media equivalent to Google Alerts, this platform tracks brand mentions for identified keywords in video, blogs, microblogs, events, bookmarks, comments, news, Q&A, hash tags and even audio media. It also indicates if mentions are positive, negative, or neutral.
8. Marketing Grader: Hubspot's Marketing Grader is a free assessment tool for the entire marketing funnel. It uses more than 35 metrics to calculate your brand's grade by looking at if you are regularly blog posting, Tweeting, updating on Facebook, converting visitors into leads, and more.



## **1.6 Critical Success Factors in ICT-based Tourism Marketing**

### **1.6.1 Integrated Tourism Marketing**

Tourism is an information intensive industry. Travelers are taking on a large amount of risk when they invest time and money in a travel experience. The greater the perceived risk, the more information the travelers will seek. Tourism marketing is an opportunity to minimize perceptions of risk and demonstrate the appropriate mix of value for money.

The proliferation of online technologies means that consumers have growing access to choice in product as well as access to opinions about those products. Trustworthiness is an essential element of tourism marketing, with consumers eschewing brand-developed marketing messaging and seeking information from trusted voices instead.

Because consumers are gathering data from multiple platforms, tourism marketers need to pursue a consistent messaging strategy. Synchronicity in messaging across platforms creates efficiencies, minimizes external costs, and builds momentum for messaging.

All tourism businesses and destinations must invest the time and resources to develop a comprehensive tourism marketing strategy. Creating an action plan that clearly articulates goals, responsibilities, and metrics for success ensures that the organization is being realistic in the context of the available resources. An action plan also makes certain that those resources are being spent in a cost-effective manner and creates a platform to adjust marketing activities based on what is successful. This is particularly important for digital marketing when considering the speed with which trends change and new platforms become available.

The following are questions that every digital marketing strategy should answer:

- Where are we now?
- Where do we want to be?
- How do we get there?
- Who is responsible?
- How do we monitor performance?

### **1.6.2 The Use of Inbound Marketing vs. Traditional Outbound Marketing**

Inbound and outbound marketing are terms used to describe two complimentary though different approaches to delivering messages and achieving marketing goals. (These terms should not be confused with inbound and outbound tourism, which refers to tour operator and travel agent services related to sending and receiving visitors, respectively.)

Outbound marketing has been the dominating marketing technique since the rise of the Internet, 20 years ago. Outbound marketing is also called “interruptive marketing. It focuses on untargeted mass scale advertisements and promotion. This kind of marketing is designed to get the attention of the target audience by interrupting their space—a break in a TV program, an advertisement in between the pages of a magazine article, or a billboard breaking up the view of a natural landscape. Outbound marketing has not been replaced by the propagation of the online space, rather it has created new platforms for advertising, most

notably banner and pop-up ads that exist near or within online content. This has been an important revenue component for many online media platforms that once offered their services and content for free. And while unit costs for outbound, interruptive marketing are considerably less on online platforms than in traditional media platforms, it still can be a out of reach financially for many small and medium sized businesses and destinations.

Interruptive marketing has become less effective as consumers have become more capable of tuning out advertising. Voltier Digital (2012) noted the following shift in attitudes towards advertising:

- 44% of direct mail is never opened
- 86% of people skip through TV commercials
- 91% have opted out of company email because it was too focused on sales
- 84% of 25 to 34 year olds have left a favorite website because of an irrelevant ad.

Fact: The democratization of media and the widening of marketing platforms has caused a re-think in how tourism marketing and advertising must be accomplished (UNWTO 2014).

The concept of inbound marketing focuses on placing messaging and content that is relative to consumers where they are most likely to find it. This content then promotes a message, story or call to action that is inspiring and useful, eventually motivating a consumer to buy the product or service. An inbound marketing strategy that focuses on content distribution can achieve the same results as traditional marketing with a savings of 61%, making it an excellent option for small and medium enterprises with smaller marketing budgets. Hubspot, a leading inbound marketing software company, cites that businesses using its software save an average of 13% per lead generated and boost conversion rates on the website by 21% (2012).

**Table 2: Inbound & Outbound Marketing Examples**

Outbound Marketing Examples	Inbound Marketing Examples
Search Spam	Search Engine Optimization
Paid/Rented Email Lists	Opt-in Email Lists
TV, Radio and Print Advertising	Downloadable E-Books
Billboards and Outdoor Advertising	Sponsored Events
Generic Press Releases	Customized Press Releases
Pop-up and pop-under digital ads	Thought Leadership
Contextual ads	Community Building
Outbound sales calls	Influencer Outreach
Interstitial webpages	Blogging
Trade Show Booths	Public Speaking
Untargeted social media advertising	Earned Social Media
Forum, Comment and UGC spam	Word of Mouth and Viral Marketing
Banner and Display Ads	Content Creation
Paid App Reviews	Organic App Store Visibility
Online Video Ads	Original Video Content

Source: Adapted from WordNotes 2014.

### 1.6.3 Experience-led Marketing

Tourism is a complex industry with unique characteristics:

- It is consumed where it is produced.
- It is interrelated—there is generally not only one product.
- External factors heavily influence the enjoyment of the product.

Tourism marketing, too, is complex. Marketing is now a narrative journey that takes the customer from Point A (their origin) all the way through Point Z (their destination) and back again. Content throughout this entire journey should “delight, excite and be relevant” (Manning, 2014).

Tourism businesses and destinations that do not consider the experience are missing a significant opportunity to generate additional word-of-mouth marketing, especially among the vibrant millennial market that often travels more broadly, spend more money, and is willing to utilize small and medium-sized enterprises (Klein, 2014; MMGY Global, 2014; Goldberg, 2014).

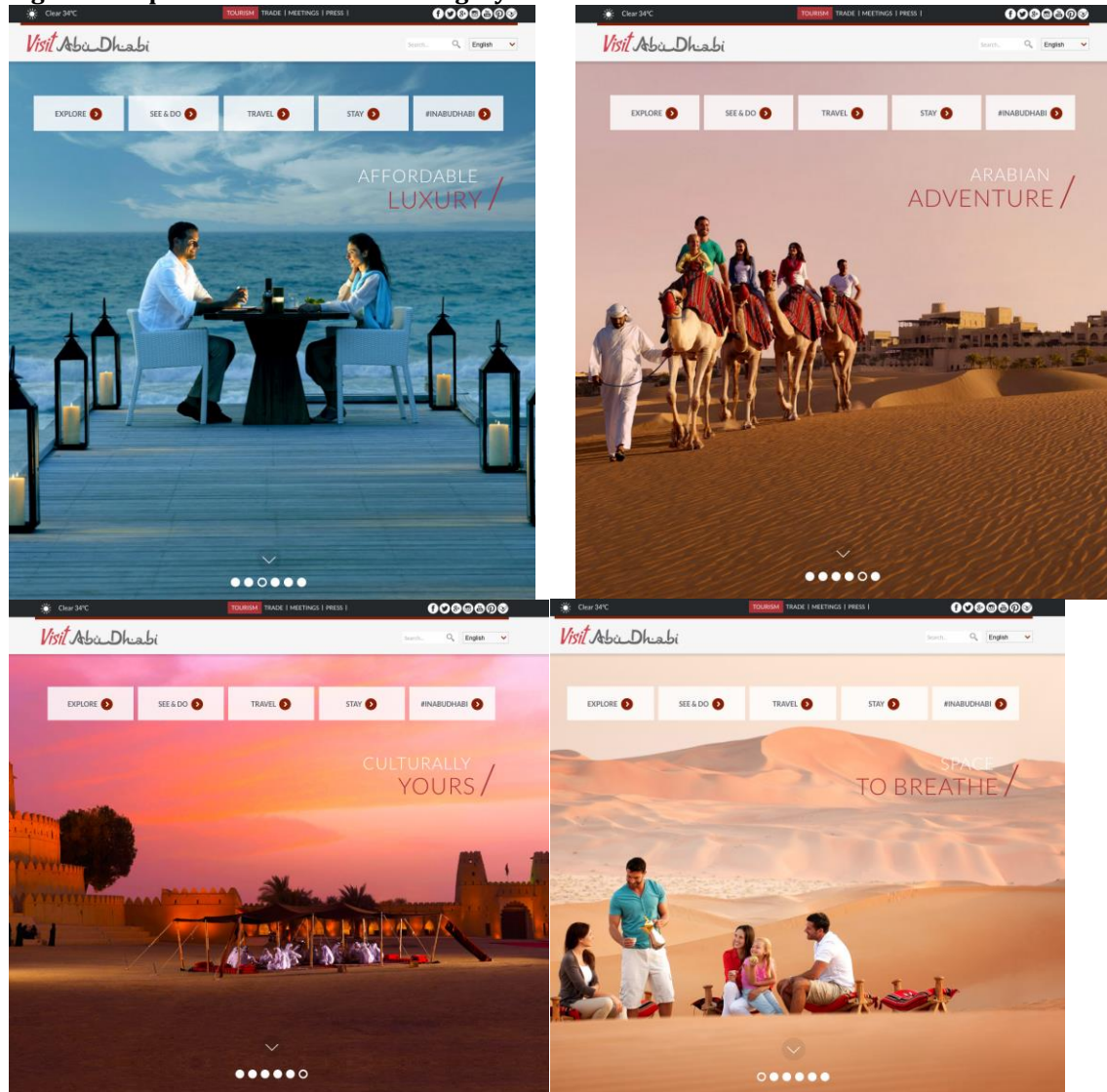
*Tourism marketing is most effective when it illustrates the composite experience of a destination and not simply a laundry list of attractions and accommodations (Lagkiewski and Zekan, 2006).*

Authenticity is a key factor in driving high-value markets (Yeoman et al, 2007). The precipitous rise of the sharing economy and the proliferation of home-stays demonstrate an increasing desire to be immersed in a place and experience a destination with a

local perspective. Experience-based marketing focuses on creating a promise about the whole journey (Economist Group, 2014).

ICT-based tourism provides a fruitful environment for experience-led marketing by creating a highly visual, explorable world. Figure 9 depicts Visit Abu Dhabi’s’ experience-led website, which is rich in images that emphasize lifestyle and exploration.

**Figure 8: Experience-led Website Imagery. Visit Abu Dhabi**



Using a combination of platforms that reinforce key brand messages, ICT-based tourism marketing can assist the target audience in creating an aspirational mind picture of a trip – whether for leisure or for business. Experience-based marketing is also applicable during the visitor’s stay at the destination. Destinations and businesses can continue to reach and inspire their audiences with a welcoming presence at the airport, rich information for handheld devices, and customized messaging at hotels.

***Travel Brands on the Forefront of Marketing at the “Experience Phase”:***

Worldhotels’ property The Manhattan Hotel Rotterdam, a five-star luxury hotel in the Netherlands, is the first property in the country with a Twitter-based concierge. Hotel guests can direct their questions to the @conciergeRTM twitter account and expect a prompt reply.

The service is also available for non-hotel guests, thereby further enhancing the brand experience and extending the hotel's international reach.

Melia's Sol Wave Hotel in Majorca, Spain, is self-described as the world's first "Twitter-based" hotel. The hotel encourages guests to participate in the #SocialWave online community only accessible through the hotel's WiFi, where they can share photos, discuss hotel activities, and arrange in-person meetings. Each area of the hotel is designed to stimulate conversation. Exclusive assistance for #TweetPartySuite guests (special suites for tweeting) is offered via Twitter@SOLWAVEHOUSE and #ASKME700. In this example, technology and guest experience are conveniently packaged for seamless consumption (Melia, 2013).

As broadband expands globally, connectivity is more frequent and provides additional touch points for the tourism brand to reach the consumer. This allows a richer and more sophisticated customer relationship that is enhanced by other trends such as customization.

#### 1.6.4 Incorporation of Mobile Devices

2014 was the year of the "mobile tipping point," in which mobile use surpassed fixed Internet access (KPCB, 2014). More people than ever are constantly connected to the Internet, with one-third of the world's population expected to have a smartphone by 2017. The largest growth will be in emerging economies where the cost of technology is slowly decreasing and incomes are rising (eMarketer, 2014).

Marketing through mobile devices has several unique characteristics (Lee and Mills, 2007):

- Ubiquity: Wireless Internet allows messaging to travel anywhere.
- Location Awareness: The user's location can be used to provide customized messaging.
- Immediacy: Users can react in real-time to specific situations.
- Personalization: Customers set their devices according to their preferences, which can then be used as a filter for specific messaging.
- Broadcasting: Information can be spread to large populations.
- Identification: Customer information can be shared with the marketer due to SIM cards.
- Connectivity: Smart phones can link to other devices and machines, as well as among users.

This growth provides the opportunity for tourism marketers to reach their target audience in a highly personal way throughout all phases of the travel cycle.

"SoLoMo" (social, local and mobile) have been a dominating force in tourism marketing as travel brands try to push personalized, useful information to travelers. Taking this approach has value as one in three mobile searches has local intent.

*"Smart phone use blurs the boundaries between the physically and technologically present and creates new avenues for people to communicate while they are travelling" (Jansson, 2007)*

A report from Deutsche Post PHL (2015) notes that a key value for smartphone users with a high propensity to travel is the "personal custodian" effect. Customized, detailed

information is available quickly and effectively and can help make travel decisions related to accommodation, dining, entertainment, translation and logistics. Thirty eight percent (38%) of those surveyed for a 2012 Google Travel report used a mobile phone to access travel related information. A poorly designed mobile website is the No. 1 deterrent to booking a trip via smartphone (Google, 2012).

## **1.7 Challenges in ICT-based Tourism Marketing**

### **1.7.1 The New Digital Marketing Skillset**

ICT-based tools for tourism marketing and the digital marketing landscape are changing at an extremely high velocity. ICT-based tourism marketing requires a new skillset that differs from traditional marketing. The Digital Marketing Institute conducted an interview with Fortune 500 companies and global agencies and recognized that there is a significant gap in digital marketing talent.

A recent study by the Digital Marketing Institute pointed to the set of skills that are most treasured by Fortune 500 companies and advertising agencies. While these are generally highly specialized individuals, proficiency in these skills is necessary for navigating the digital marketing landscape:

- Analytics
- Mobile Technology
- Content Marketing
- Social Media
- Email Marketing
- Marketing Automation
- Search Engine Optimization
- Digital Advertising

The same report noticed that there is a significant lack of marketing professionals that understood analytics and mobile marketing. While expertise in a single skill is helpful, it is not as important as understanding that allows successful marketers to move seamlessly among platforms and among different audiences to create “stickiness” to a brand. Storytelling has become an increasingly important component of digital marketing, especially as multi-platform campaigns that link to traditional media become the most effective form of outreach.

The division between the worlds of marketing and journalism is blurring, and especially in the online space, the concept of publishing is replacing the notion of promoting. Empathetic skills are needed to understand consumers’ motivations and create customized content. Creativity in systems thinking allows digital marketers to take major concepts and larger brand concepts and to break them into pieces of content that can be distributed. Finally, community-driven individuals with high levels of social awareness are best positioned to understand market segments and the kind of content that is most likely to appeal to them.

### **1.7.2 ICT Infrastructure**

ICT infrastructure underpins the capacity of the tourism industry to effectively use digital marketing techniques and is an important indicator of overall competitive success (Mihalic & Buhalis, 2013).

Lack of reliable connectivity can complicate tourism businesses attempting to leverage ICT for their marketing needs. The expansion of cellular networks has brought connectivity to many developing and rural areas with affordable services. However, and while most cell networks—especially those in sub-Saharan Africa—do not yet provide high-speed connectivity, they do offer the ability to accommodate low-bandwidth applications such as email, which is crucial when managing the sales process.

## 1.8 Research Methodology

The tourism industry is complex and multifaceted, inclusive of stakeholders that touch every component of the visitor experience. This study focuses on the two largest contributors to the tourism economy:

- Formal accommodation providers, including hotels, motels, lodges, and inns
- Tour operators, servicing both inbound (sometimes referred to as a destination marketing company [DMC]) and outbound markets (including travel agencies)

The study also includes destination-level authorities such as:

- National tourism authorities, including ministries, departments or cabinets of tourism
- Destination marketing organizations, chambers of commerce, convention and visitors bureaus
- Convention and visitors bureaus

While the research will discuss implications across all 57 member states of the OIC, the main statistical analysis is for the most part focused on the 27 members of the COMCEC Tourism Working Group, which represent a diverse frame of cultures, levels of economic development, and geographic distribution:

Azerbaijan	Malaysia
Bangladesh	Mauritania
Burkina Faso	Mozambique
Cameroon	Niger
Djibouti	Nigeria
Egypt	Oman
Gambia	Palestine
Indonesia	Saudi Arabia
Iran	Senegal
Iraq	Suriname
Kuwait	Tunisia
Kyrgyz Republic	Turkey
Lebanon	Uganda
Libya	

This study was prepared using a combination of primary and secondary research from sources inside and outside the OIC member states.

Comprehensive desk research on digital marketing trends was completed from academic journal articles, industry research, statistical networks, news articles, tourism industry

websites, professional manuals and guidebooks. Information was supplemented through the research team's practical, field-based knowledge of developing and managing digital marketing strategies in over 30 countries worldwide.

A series of online surveys were conducted to gain quantitative and qualitative data on challenges and successes with ICT-based marketing. An online survey was conducted among the tourism industry private sector (tour operators, hoteliers, and tourism associations). The survey was sent to 1005 contacts through the researcher's professional network and collected through online research of large, medium and small tourism businesses within OIC tourism working group states. Invitations were delivered via email with approximately 400 personalized follow-up reminder emails delivered. 233 telephone calls were made with managers at each business. A total of 119 survey attempts were made with 60 completed surveys from 30 countries second online survey was conducted among destination-level authorities, including ministries of tourism and destination management and marketing organizations. Because of constraints in time and resources to further pursuing responses, many of the quantitative analyses included within this study may not meet statistical validity. In such cases, the data presented will be used as a snapshot from which further assumptions about the industry at large can be made.

In addition to online surveys, field visits to three OIC Member Countries, namely, Oman, Malaysia and Mozambique, were made with a view to further analyze the ICT-based tourism marketing. In this respect, many interviews have been made with government as well as private sector representatives in these countries.

ICT-based tourism marketing solutions are a complex network of hardware, software, and networks. The primary focus of this study is on digital marketing as the practice that largely comprises ICT-based marketing for the tourism industry. This should not be confused with ICT-based tourism sales, which is more focused on the transaction, including the intricacies of e-booking and electronic reservations systems. However, ample attention is paid to the value of sales as the ultimate goal of digital marketing activities.





## 2 ICT-based Tourism Marketing in the OIC Member States

The following sections articulate how the OIC's member countries are undertaking and implementing four main pillars of successful ICT-based tourism marketing:

- Strong ICT Infrastructure
- Integrated Marketing Approach
- Skilled Digital Workforce
- Public-Private Collaboration

The OIC member countries represent a diverse set of states with varying social and cultural approaches to marketing, significantly different levels of economic development. The following analysis is made according to the three official regional groupings of the OIC Member Countries, namely Arab, Asia and Africa Groups (See Appendix 1).

### 2.1 ICT Infrastructure in the OIC Member States

Information and communication technology requires the availability and proper functioning of several key components:

- Hardware such as computers, phones and cameras
- Software to achieve certain goals
- Networking such as fiber optics, satellite communication, and telephone connection to transmit information

Each of these components must function in concert together. The user must fully understand how to utilize each of these components to achieve their goal and government policy has a significant impact on the availability of tools and the vitality of the networks.

Two standard global indicators help measure the maturity and vitality of a country's ICT infrastructure as it relates to tourism marketing:

*Internet penetration* is the percentage of the population regularly using the internet and provides insight on availability of ICT networks and tools as well as human development around technology usage (Pratama and Al-Shaikh, 2012; Archibugi and Coco, 2004).

*Average Connection Speed* articulates the health of the country's network and the ability of users to send and receive information. This indicator is particularly impactful on tourism marketing content such as high resolution images, videos, and the use of complex internet-based software.

To assess ICT infrastructure in the OIC Member States, an original survey questionnaire was created and distributed through an online survey platform to public and private sector businesses/organizations in over 30 OIC member states. 60 private & public businesses/organizations from 19 different countries responded, and they elucidated their ICT usage habits, and their perceptions of ICT infrastructure in their country and its role in the digital marketing. Additionally, national and regional ICT-policies and international ICT indicators were researched.

### ***The Arab Group***

Despite considerable variations among the GCC countries and other states, the Arab group has the most advanced ICT infrastructure of all OIC member state groupings.

Highest levels of internet penetration among OIC member states occur in the GCC region with Qatar registering 96.55%, followed by Bahrain (90%), UAE (88%) and Qatar (85.4%), and Kuwait (75.47%). Lowest internet penetration is found in Iraq (9.2%), Comoros (6.5%), Mauritania (6.2%), Somalia (1.5%) (Akamai, 2015).

The Arab region has the strongest perception of ICT infrastructure of all OIC regions with the overall rating of 2.8 out of 4 from the survey respondents (Scale: 1=Very Poor, 4=Very Good), though this only reflects a moderately satisfied response. Overall, connection speeds are relatively fast compared to other OIC member regions.

While perceptions of connectivity costs from the survey respondents (primarily in OIC countries and the Levant) are moderately positive, a World Bank report (2014) noted that Internet access is “prohibitively expensive” for most residents. Fixed broadband costs about 3.6 percent of the average monthly income per capita, while mobile broadband costs about 7.7 percent. In Tunisia, the country’s poorest 40 percent of the population would need to spend over 40 percent of their income to afford high speed Internet. Access is slightly more affordable in Morocco where the same poorest 40 would only spend about one-third of their income. In Yemen, the poorest 40 percent of the population would need to spend approximately one half of their income. Sixty percent of residents in Algeria, Djibouti, Morocco, Syria, Tunisia and Yemen cannot afford Internet access of any type (World Bank, 2014). In order to address access and affordability issues, the majority of Arab Group governments have a separate ICT regulatory authority such as a Ministry or a Public-Private institution (with the exception of Syria, Yemen, Somalia and Kuwait) with a mandate to improve the ICT environment, attract investment and strengthen skills. These institutions aim to develop and manage the national ICT policies. They also support ICT infrastructure development, which is quite prevalent in the Arab Region, totaling more than \$96 billion in 2014 (Hamid, 2014). Through varying in scope and scale, ICT infrastructure investment has focused on connecting universities, streamlining government services, improving healthcare and strengthening the transportation environment - all with clear positive effects on the tourism industry.

### ***The Asia Group***

According to the Asia Pacific Telecommunity, ICT development is still a major challenge for many countries in the Asia (2014). There are significant variations in indicators among Asian group members. Penetration rates are highest in Brunei Darussalam (64.5%), Albania (60.1%), Kazakhstan (54%), and Turkey (46.82%), while the lowest rates are found in Pakistan (10.9%), Turkmenistan (9.6%), Bangladesh (6.5%), Afghanistan (5.94%).

Private sector respondents from this region had more negative perceptions of ICT infrastructure than those in the Arab group, with a rating of 2.75 out of 4 (where 5 is most favorable and 1 is least favorable). Two major challenges are the affordability of the Internet services and the reliability of those services. The Asia-Pacific Telecommunity, which is a collection of key organizations of governments spearheading ICT development in cooperation with telecom service providers in Asia-Pacific region, have developed a strategic plan to directly address these main challenges with policy and regulation, capacity building, public

private partnerships, and cooperation with the telecom sector embedded into their action plan (Asia-Pacific Telecommunity, 2015).

When asked what infrastructure reforms, upgrades or improvements would improve their ability to do business, private sector users requested “fiber optic cabling”, and “upgrading to 4G or higher” in order to “provide 24/7 travel service” to their “corporate clients” more effectively. A consistent theme was a request for more “Wi-Fi” availability hotspots. ICT hardware is perceived as the most affordable among all OIC regions, were the however, it is still perceived as fairly expensive, rated at 2.58 out of 4 (Scale: 1=Very Expensive, 4=Very Affordable) by the survey respondents.

### ***The Africa Group***

The Africa group has the weakest ICT infrastructure of all OIC member countries – with weakest connectivity in rural areas. According to a study conducted in partnership with the World Economic Forum, World Bank, African Development Bank (2013), Africa is trailing the world significantly in “technological readiness”, the ability to use and adapt ICT for business – including tourism. However, Africa’s growth in mobile technologies has been one of the world’s most dynamic: lending to the fact that infrastructure investment has focused primarily on mobile growth rather than rewiring outdated landline technologies (AfDB, 2013).

Perceptions of ICT infrastructure are poorest amongst African respondents to the survey. Even with low bandwidth and poor connectivity, Africa retains high costs of Internet and broadband services, inadequate connection speed and unreliable connection (Appendix 6). Average monthly fixed-broadband prices are 3 times higher than in other regions and mobile-broadband prices are twice as expensive – a key barrier to ICT usage. (ICT Data and Statistics Division, 2015) The International Telecommunication Union (2013) states that there are several regional barriers to further ICT development: decision-makers lack the knowledge to make well-informed decisions, low ICT use level in many sectors, lack of broadband connections, and the inability of large population sections to afford services.

Perceptions of ICT hardware costs were also reported as expensive by African survey respondents, most likely a result of high taxes on these products. For example, Mozambique places a 17% tax on all technology goods and Uganda an additional 22% (see Appendix 2). Positively, Africa has a wide access to the Internet with very few restrictions, which allows the tourism industry to take full advantage of different platforms and websites for their business.

There are several programs in place within African OIC member states to improve ICT infrastructure, mainly related to the ‘ACE’ (African Coast to Europe) Fibre Optic system, a submarine communication cable system along the west coast of Africa between France and South Africa, covering 17 African nations. This system is a backbone for African nations to strengthen their national ICT infrastructure. The expected results of this project are improved internet speeds, improved connectivity and high internet use (TLC Africa, 2015).

## 2.2 Current ICT-Based Tourism Marketing Situation & Challenges in the OIC Member States

The following section examines how the public and private sector within OIC member countries are performing in the core elements of effective ICT-based tourism marketing beyond a healthy ICT ecosystem:

- digital literacy and online marketing skills
- cooperation (including intergovernmental cooperation in the case of the public sector)
- integrated marketing strategy utilizing multiple online marketing platforms

COMCEC Tourism Working Group Members' destination websites are analyzed based on 11 best practice characteristics of websites mentioned in Section 1:

- Image-rich: more images than texts in areas above the website's top one-third (commonly referred to as "the fold")
- Focused on travel experiences, not only products, using evocative language and including information of routes, circuits, and thematic activities
- Customized for the user's geography, language or interest
- Contains dynamic content such as a blog or news section that is regularly updated
- Integrates social media by integrating links to related platforms and pulling in social media content
- Includes a section for the press and media
- Includes a section for the travel trade
- Captures email address for future e-mail marketing
- Includes a concierge service or contact mechanism for follow-up questions
- Is responsive to mobile devices

In addition to websites, the social media presence of COMCEC members is also examined in terms of the volume of content being distributed on key channels such as Facebook, Twitter and Instagram, as well as each destination's community size. Moreover, private sector usage of ICT-based tourism platforms is examined through anecdotal evidence provided through survey responses and overarching trends described in previous research.

### 2.2.1 Arab Group

#### ***Public Sector***

##### ***Digital Literacy & Marketing Skills***

In terms of digital literacy, all Arab group public sector respondents stated that there are programs in place in their countries to advance education in this field, half of whom cited digital literacy programming at the primary school level. 'Lack of know how' and 'lack of qualified staff' were two of the key challenges reported to implementing digital marketing activities, alongside 'cost' and 'budget' in this region. Tourism education programs are prevalent in the GCC, Egypt, Jordan and Lebanon. The United Nations World Tourism Organization's TedQual Program certifies universities and tourism degrees to ensure they

meet global best practices in tourism education. Two of the three TedQual certified programs in the Arab region offer ICT skills and online marketing classes:

- Bachelor in Tourism - Sultan Qaboos University, Muscat, Oman
  - o IT Applications for Tourism, Advances Computers Skills and Tourism Marketing
- Hotel Management – Jordan Applied University College of Hospitality and Tourism Education, Amman Jordan
  - o Information Technology Skills
  - o Hospitality Industry Computer Systems 1
  - o Hospitality Industry Computer Systems 2
  - o Hospitality Sales & Marketing

Upon probing the skills of their marketing personnel to competitively market their destination online, 66.7% of the organizations 'somewhat agreed' or 'agreed' and 33.3% of the organizations 'somewhat disagreed' to having adequate skills. Moreover, only 33.3% of the organizations have a comprehensive online or digital marketing strategy in this region.

All public entities surveyed have online marketing personnel: 80.0% have one or more IT specialists, 60.0% have a social media specialist(s), and 40.0% have a full-time digital specialist(s), website specialist(s), have shared marketing responsibilities amongst multiple individuals/departments. 20.0% outsource some of the marketing duties to an advertising, public relations or marketing consultant. Upon asking to describe professional website design and management services in their country, all rated the expertise (100.0%), cost (83.3%) and availability (83.3%) to be either good or excellent.

#### Intergovernmental Cooperation

All of the public sector organizations reported to having formal partnerships with members of the tourism industry and all considered their destination's digital marketing to be effective. However, there is a significant gap in the programs offered by public sector destination marketing authorities and those which have participation from the private sector – indicating a lack of communication between public and private sectors and/or a disparity between the value of programs offered.

#### Integrated Marketing Strategy & Platform Usage for Destinations

The Arab Group has some of the most sophisticated destination marketing efforts of the OIC member states. Yet, there is a great disparity among GCC member countries and those in North Africa.

According to public sector survey respondents from the Arab region, social media (100%), online advertising (100%), e-mail marketing (76.7%), and third-party websites (60.0%) were all considered important and effective tools for tourism marketing purposes. All of the respondents considered 'website' an important marketing tool and all (100.0%) confirmed that their websites were comprehensively revised for design and content within the last 18 months. However, only 40.0% of the organizations apply Search Engine Optimization (SEO) strategy to their website actively. An examination of tourism working group members' national destination websites (Table 3) further reveals this disparity.

Mauritania does not maintain any official tourism web presence. Kuwait's tourism website is located within a larger government website and does not focus on the consumer experience. Libya and Palestine both have official destination websites, though they are significantly outdated in terms of content and design. Egypt's website is the most comprehensive among the Arab group – reflecting a modern design with a significant amount of detailed information on experiences and attractions. Lebanon's website also uses several best practices, including clear navigation and focusing on engaging, experience-based images. While there is no dynamic content, the static content is available and linked to Facebook and Twitter for sharing. Content is linked with social media.

It should be noted that there are some cases in the Arab region where national portals are less developed than regional websites. Dubai and Abu Dhabi (featured in section 1) are more globally recognized tourism destination units than the United Arab Emirates as a whole. This is clearly reflected in the investment in each of these sites – both of which meet all best practice criteria and are the most innovative in terms of added features.

A key component of website best practice is the ability to capture email in order to deliver email marketing to potential travelers. All survey respondents send regular newsletters to consumers, media and trade at least quarterly, though only two (Egypt and Tunisia) are maximizing their opportunity to capture e-mail contacts via their website.

Table 4 examines the official destination marketing social media presence within the Arab region among key platforms (Facebook, Instagram, Twitter, YouTube, and Pinterest). Social media is a popular avenue for tourism marketing in the Arab region. Facebook is by far the most popular (76%) platform utilized in the Arab region, followed by YouTube (48%), Twitter (44%), Instagram (24%) and Pinterest (12%). Saudi Arabia maintains the largest collective social media community on its central English-speaking platforms with nearly 700,000 followers across all platforms, followed by Jordan (489,595), and Qatar. Several countries maintain no official tourism destination social media pages: Iraq, Kuwait, Libya, Mauritania, Somalia, Sudan and Syria. In the case of Bahrain, the Ministry of Culture maintains both a Facebook and Instagram presence with content about activities, though it is not specifically targeted towards tourists.

Mobile is increasingly important in the Arab region where mobile penetration rate is 94% which means almost 9 in 10 people accessing the internet are doing so through a mobile device (eMarketer, 2014). Most public sector tourism marketing organizations utilize the following tools to target mobile users: a mobile-enhanced website, mobile advertising, SMS advertising and campaigns, a mobile app, location-based services and proximity-based marketing. All of these tools were found to be mostly effective by those who use them, except for proximity-based marketing.

**Table 3: COMCEC Tourism Working Group Members Destination Website Characteristics - Arab Group  
(Observed April 2015)**

Country	Image-Rich	Focus on Experience	Customized	Dynamic Content	Social Media Integration	Press Section	Trade Section	E-Mail Capture	Concierge or Support	Responsive to Mobile
Djibouti	Yes	Yes	No	No	Yes	No	No	No	No	No
Egypt	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes
Iraq	No	No	No	No	No	No	No	No	No	No
Kuwait	No	No	No	No	No	No	No	No	No	No
Lebanon	Yes	Yes	Yes	No	Yes	Yes	No	No	Yes	No
Libya	No	Yes	No	No	No	Yes	No	No	No	No
Mauritania	No	No	No	No	No	No	No	No	No	No
Oman	No	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No
Palestine	No	No	No	No	No	No	No	No	No	Yes
Saudi Arabia	Yes	Yes	No	No	Yes	No	No	No	No	No
Tunisia	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	No

Source: Created by the authors



**Table 4: OIC Member States Official Social Media Platforms Availability and Number of Followers – Arab Group  
(Observed April 2015)**

Country	Facebook		Instagram		Twitter		YouTube		Pinterest		Total
Algeria	Yes	4,522	No	0	Yes	1,120	Yes	37	No	0	5,679
Bahrain	No	0	No	0	No	0	No	0	No	0	0
Benin	Yes	5,649	No	0	No	0	No	0	No	0	5,649
Comoros	Yes	1,172	No	0	No	0	No	0	No	0	1,172
Djibouti	Yes	35	No	0	No	0	No	0	No	0	35
Egypt	Yes	150,281	Yes	735	Yes	12,600	Yes	17,278	No	0	180,894
Iraq	No	0	No	0	No	0	No	0	No	0	0
Jordan	Yes	304,036	Yes	15,500	Yes	165,000	Yes	3,675	Yes	1,384	489,595
Kuwait	No	0	No	0	No	0	No	0	No	0	0
Lebanon	Yes	912	No	0	Yes	249	No	0	No	0	1,161
Libya	No	0	No	0	No	0	No	0	No	0	0
Mauritania	No	0	No	0	No	0	No	0	No	0	0
Morocco	Yes	17,896	No	0	No	0	No	0	No	0	17,896
Oman	Yes	11,576	No	0	Yes	1,948	Yes	1,291	No	0	14,815
Palestine	Yes	1,751	No	0	Yes	379	Yes	242	No	0	2,372
Qatar	Yes	345,338	Yes	11,000	Yes	64,300	Yes	1,214	Yes	0	421,852
Saudi Arabia	Yes	496,752	Yes	8,785	Yes	186,000	Yes	1,121	No	0	692,658
Somalia	No	0	No	0	No	0	No	0	No	0	0
Sudan	No	0	No	0	No	0	No	0	No	0	0
Syria	No	0	No	0	No	0	No	0	No	0	0
Tunisia	Yes	10,133	No	0	No	0	Yes	23	No	0	10,156
United Arab Emirates	Yes	140	Yes	489	Yes	9,999	Yes	107	No	0	10,735
Yemen	Yes	1,078	No	0	Yes	43	Yes	36	No	0	1,157

Source: Created by the authors

## ***Arab Group - Private Sector***

### ***Digital Literacy and Online Marketing Skills***

The digital skills gap is significant in the Arab group – primarily among urban and rural areas and among developed GCC economies and North African countries (DTTT, 2014). Survey respondents expressed lack of managerial knowhow and availability of digital marketing expertise within staff as the main barrier for improving their online presence.

When asked about the skills of their marketing personnel to competitively market their business online, 58.5% of the businesses ‘completely agreed’, and 35.3% of the businesses ‘somewhat agreed’ to having adequate skills. Only 47.1% of the businesses in this region currently have a comprehensive online or digital marketing strategy. L2 ThinkTank, a digital business intelligence firm, released a “digital IQ” report in 2013 of luxury brands throughout the Middle East stating that leading digital marketing innovation was being driven by the tourism industry, though nearly one-third (31.3%) of tourism businesses reported to not have any online marketing expertise in house.

### ***Public-Private Sector Cooperation***

More than three quarters of Arab group business respondents (76.2%) maintain a relationship with a national level tourism authority but very few participate in any of the activities organized by the authority. The most popular proved to be “listing on a national website”. Three quarters (75.0%) of the respondents in this group deem their destination’s digital marketing to be effective and almost all respondents (95.0%) wished to strengthen their ties with the tourism authorities at a destination level.

### ***Integrated Marketing Strategy & Platform Usage***

Only 56.5% of the businesses have a comprehensive online or digital marketing strategy in place to market their business. When the private sector was asked to rate their own ICT skills and capabilities, they rated it at 3.48 out of 4 (Scale: 1=Very Poor, 4=Very Good)—highest of all regions.

All of the respondents (100%) considered ‘website’ an important marketing tool and it was found out that only 70.6% of the websites in this region were comprehensively revised for design and content within the last 18 months. Most of the respondents (81.3%) reported to not having a blog or a dynamic content functionality on their website, with most of those who do, update them at least once a week. Upon asking to describe professional website design and management services in their country, most rated the expertise (88.2%), cost (68.8%) and availability (87.5%) to be either good or excellent. Nearly half (47.0%) of the surveyed Arab businesses apply SEO strategy to their website actively to bring top-of-mind awareness. Nearly two-thirds (64.7%) of Arab region respondents stated they monitor website traffic and usage statistics more than once a month, if not more often.

E-mail marketing does remain fairly common however, with 78.3% of Arab group businesses reporting that they have a consumer-focused newsletter. E-mail marketing is a very important tactic for tourism businesses in the region, especially for those campaigns targeted to other Arab populations. The main value of this channel is the ability to build trust and engagement around key brands. (Istizada, 2014). Over three-quarters (76.5%) of the businesses send newsletters to consumers with 47.1% of them sending monthly. Nearly a quarter (23.5%) of

the businesses surveyed in this region do not send newsletters to the consumers at all while 60.0% of the businesses send newsletters to the travel trade and 46.7% to the media. Only 35.3% of the businesses use an e-mail marketing service provider to send newsletters in this region with MailChimp (26.7%) and ConstantContact (13.3%) proving the most popular.

Social media usage for business purposes remains lower than in Asia and Europe, with a penetration of approximately 24%, much lower than the Asian group, but higher than Africa. However, of total internet population 80% uses social media (Hotelmktg, 2013).

Mobile-focused marketing remains low in the Arab region. A report published by eMarketer (2015) titled "The Global Media Intelligence Report: Middle East & Africa, 2013" reported that although the Internet penetration rates are increasing in the Arab world rapidly, including marketing specifically for mobile mobile-driven ad spends remains low. The trend is projected to continue with a small growth until 2017. Survey highlighted that Arab region businesses do not have a mobile app (60.0%), a mobile-enhanced website (57.1%), or use proximity-based marketing (78.6%). Mobile advertising (60.0%), location based services (53.8%) and SMS advertising and campaigns (56.2%) are popular, and considered effective, except for location-based services.

Traditional forms of marketing and sales still remain an important component in the Middle East's tourism industry (Chebib, 2014). On average, only 17.3% of business' respondents' total sales occurred through an online channels or were the direct result of ICT-based strategies, 9.7% of which were made as the result of an OTA. These numbers are low compared to Asia and Africa where there are a greater number of online transactions.

## 2.2.2 Asia Group

### **Public Sector**

#### Digital Literacy & Online Marketing Skills

Like other regions, the digital skills gap is significant in Asia where significant portions of the population live without internet access or access to ICT skills training. (UNESCAP, 2014). Digital literacy has become an important area of conversation among OIC member countries, especially those members of ASEAN (Association of Southeast Asian Nations) where human capital development has been identified as a strategic thrust for the cooperative ICT Master Plan (2015).

However, perceptions of ICT skills and capabilities by Asian group public sector institutions are very high, at 3.27 out of 4 (Scale: 1=Very Poor, 4=Very Good). All of the public sector destination marketing organizations responding to the survey indicated strong online marketing personnel on staff – most popular being IT specialists, website specialists and social media specialists. All respondents agreed that availability of marketing personnel is sufficient to competitively market the destination.

Formal education for online marketing personnel is plentiful throughout the Asia group, with every country having at least one tourism-related program or degree available from a university, college, or trade school. TedQual certified schools are located only in Indonesia: STP Bandung which offers degrees in destination management and tourism business management (among others), each with core requirements for digital literacy.

### Intergovernmental & Private Sector Cooperation

Two thirds (67%) of Asian group public sector organizations reported to having formal partnerships with the members of the tourism industry. The organizations that have invested in collaboration with the private sector have found valuable opportunities for co-marketing among tour operator association, hotel association, and local media platforms.

### Integrated Strategy & Online Marketing Platform

The Asia group's online marketing platform usage varies greatly from high-volume visited destinations such as Malaysia to more boutique destinations such as Kyrgyzstan. Each represents large variations in investment in ICT-based tourism marketing platforms. Nearly two-thirds (63.6%) of the organization reported to having a comprehensive online or digital marketing strategy in place – an essential component to maximizing digital tourism marketing. Unlike the Arab and Africa region where website and email are dominant marketing platforms, perception of the value of all digital marketing platforms (also including social media, e-mail marketing and online advertising) are viewed as valuable to the destination marketing mix.

An examination of websites of COMCEC tourism working group members in the Asian region (Table 5) demonstrates a higher propensity to embed multiple best practice methodologies than either the Arab or Africa region. Particularly noticeable is a consistent focus on experience-based content. Malaysia and Turkey (two of the world's leading tourism destinations by volume) both maintain vibrant, visual websites with several interactive features including virtual tours, trip planners, and extensive multimedia sections. Less evocative is the Kyrgyzstan website, which has sizeable amounts of written content but challenging navigation and a dated design from 2007. The Iran tourism portal is still in beta testing at the time of this report, but currently lacks many of the best practice features designed to engage and inspire potential travelers.

The use of social media also showed a great disparity between high-volume destinations and others in the Asian group. Turkey (1.45 million), Indonesia (439,281) and Malaysia (303,899) retain the largest social media communities across key platforms with other Asian destinations at a maximum of one-tenth those sizes. As in other regions Facebook is the most popular platform for destination marketing, used by 71% of the members, followed closely by Twitter (65%). Slightly under half (47%) of Asia Group members use YouTube while Instagram is only used by the high-volume destinations. Though incomparable to Turkey, Indonesia, or Malaysia's use of the platform, the Maldives has attracted a sizeable Twitter following of over 7,000 built on frequent publication of inspiring images. Tajikistan, Kyrgyzstan and Turkmenistan's retain no official destination presence on social media while Kazakhstan and Uzbekistan have limited communities as the result of weak content distribution.

**Table 5: COMCEC Tourism Working Group Members Destination Website Analysis - Asian Group (Observed April 2015)**

Country	Image-Rich	Focus on Experiences	Customized	Dynamic Content	Social Media Integration	Press Section	Trade Section	E-Mail Capture	Concierge or Support	Responsive to Mobile
Azerbaijan	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	No
Indonesia	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes
Iran	No	Yes	No	No	No	No	No	Yes	No	No
Kyrgyz Republic	No	Yes	No	No	No	No	No	No	No	No
Malaysia	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Turkey	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes

Source: Created by the authors

**Table 6: OIC Member States Official Social Media Platforms Availability and Number of Followers - Asian Group (April 2015)**

Country	Facebook	Instagram	Twitter	YouTube	Pinterest	Total
Afghanistan	No	0	No	0	No	0
Albania	Yes	13,086	No	0	Yes	1,139
Brunei	Yes	2,163	No	0	No	0
Azerbaijan	Yes	1,745	No	0	Yes	582
Bangladesh	Yes	876	No	0	No	42
Guyana	Yes	5,493	No	0	Yes	1,187
Indonesia	Yes	173,838	Yes	43,700	Yes	211,000
Iran	No	0	No	0	No	0
Kazakhstan	Yes	536	No	0	Yes	37
Kyrgyzstan	No	0	No	0	No	0
Malaysia	Yes	89,649	Yes	1,169	Yes	205,000
Maldives	Yes	1,634	No	0	Yes	22,300
Pakistan	Yes	34,190	No	0	No	0
Suriname	Yes	17,526	No	0	Yes	0
Turkey	Yes	843,066	Yes	82,700	Yes	526,000
Tajikistan	No	0	No	0	No	0
Turkmenistan	No	0	No	0	No	0
Uzbekistan	Yes	396	No	0	Yes	29

Source: Created by the authors

## ***Asian Group - Private Sector***

### ***Digital Literacy & Online Marketing Skills***

Among private sector respondents, Asian Group tourism businesses have the highest level of confidence among all groups in their capacity to successfully manage ICT for tourism marketing purposes. A significant majority (88%) agreed that their skills were adequate to compete in the modern digital tourism marketplace. The 11% that disagreed, cited lack of knowledge around particular platforms and being able to strategically weigh the cost benefits of advertising across one platform or another.

The majority of Asian Group survey respondents (88.2%) have ICT specialists, 52.9% of the businesses have a full-time social media specialist, 41.2% have a website specialist, 35.3% have one or more IT/digital specialists, 29.4% share responsibilities between individuals/departments or have a digital specialist, and 11.8% outsource the marketing duties to an agency or consultant.

### ***Public-Private Sector Cooperation***

More than 60% of the Asian tourism businesses surveyed (63.6%) maintain a relationship with a national level tourism authority and more than half are listed on the national website (54.5%). And while participation in respective tourism authorities' collaborative efforts are low, almost two thirds of respondents (63.7%) believe that their destination's digital marketing initiatives are effective. A slight majority of Asian Group respondents deem their destination's digital marketing effective. Once again, all respondents (100%) wished to strengthen their ties with the tourism authorities at a destination level, indicating a strong opportunity for public sector outreach.

### ***Integrated Strategy & Online Marketing Platforms***

Of all tourism region's perceptions of digital marketing is perceived most positively in Asia. However, there are significant differences between Southeast Asia and Central Asia.

While not previously covered in the report because of their primary function as a sales channel, it is important to understand the significant impact of online travel agents (OTAs) on the digital marketing landscape of the private sector in southeast Asia. On average, 22% of Asian tourism business respondents' total sales are made through online channels, with 28% of respondents mentioning OTAs as a key driver of those sales.

A 2013 Phocusright study estimates that 33% of all tourism related sales in Asia are generated through OTA-based ecommerce. These numbers are higher than any other OIC regions. OTAs are expected to play an even larger role in driving sales due to the rapid growing international demand for Asian tourism and increasing B2B and B2C advertising within Asia by OTAs (Martin, 2013). Opinion is mixed among survey respondents on the value OTAs provide. While increased exposure is a clear benefit with increased occupancy, the commission extracted (as much as 30% per room per night) can negatively affect tourism businesses that are already working with small profit margins:

“Direct B2C is fine via our website and expanding rapidly. Selling via OTAs is problematic as their commission is relatively high, having products on OTAs causes

issues with our existing B2B partners and we 'lose' the product in the sense that many OTAs brand it as their own.”

Though OTA's provide significant exposure for Asian businesses, websites are still an important factor. All of the respondents (100%) considered their website an important marketing tool and most Asian region businesses (81.8%) in this region comprehensively revised their website for design and content within the last 18 months. Nearly two-thirds (63.6%) of the respondents reported to having a blog or a dynamic content functionality on their website, with most of those who do, updating them at least 2-5 times per month if not often.

While overall, social media is perceived as an effective tool for tourism marketing among the Asia group, the significant differences between southeast Asian and Central Asian countries should be noted. Though level of internet and mobile device penetration and is similar social penetration (individuals actively using social media platforms) among Southeast Asia (approximately 26%) and Central Asia (5%) that has an effect on the volume and level of engagement on how tourism is marketed (WeAreSocial, 2014). Social media is increasingly being consumed in Asian markets through mobile devices – a landscape in which Asia is being an important global player. Mobile Internet penetration is increasing across Asia as smartphones becomes more affordable and improved high-speed 4G/LTE networks become more common. Southeast Asia is set to record exceptional growth – a fivefold growth in mobile subscriptions and 1000% growth in mobile data traffic (Ericsson, 2014).

### **2.2.3 African Group**

#### ***Public Sector***

##### ***Digital Literacy & Online Marketing Skills***

The Africa Group has the lowest digital penetration rates among the OIC groups, with large portions of the members' population experiencing uneven access to ICT. (UNESCO, 2006). Perceptions by public sector survey respondents to adequacy of ICT skills are lower than other regions, though all organizations surveyed have personnel with online marketing experience.

There are a number of formal tourism education programs within the African group, several of which are in Uganda and offer tourism marketing programs. There are no TedQual certified programs within the Africa Group membership.

##### ***Intergovernmental & Private Sector Cooperation***

Eighty percent of African destination marketing organizations reported to having formal partnerships with members of the tourism industry, with respondents stating that the partnerships are an essential component of the country's destination marketing strategy. However, 40.0% of the respondents in this group find their destination's digital marketing activities have opportunities for improvement.

##### ***Integrated Strategy & Online Marketing Platform Usage***

Upon asking which online marketing tools the organizations deem important, website (100%), social media (100%), online advertising (100%), e-mail marketing (80.0%), were considered important.

All of the public sector respondents considered 'website' an important marketing tool and it was found out that all websites (100.0%) were comprehensively revised for design and content within the last 18 months and one-third maintained an SEO strategy.

Table 7 depicts tourism destinations marketing portals from the COMCEC Tourism Working Group members from Africa, where destination websites are the weakest among the three groups. While no country met all of the best practice criteria, Uganda met the largest amount, with the exception of customized content for audience and responsiveness to mobile devices – of which no other African member incorporated. Most African group member websites are text heavy, without the large inspiring photos common to modern websites. Most websites do not include an email capture mechanism – related to only one third (33%) of survey respondents regularly delivering email messages. At the time of research, Niger does not have a functioning official tourism website. In the case of Burkina Faso, Cameroon, Nigeria and Senegal – the official destination marketing portals double as the Ministry of Tourism's website. While this does help streamline the responsibilities for managing and maintaining the website, it also presents a key challenge: some website content will be irrelevant to audiences. Business activities of the ministry, tourism statistics, and government news can distract a website user seeking information about experiences, attractions, and travel logistics and reduce the effect of the website as a promotional tool for the destination.

Unlike websites, social media is not perceived as useful in the Africa group, with only half of the respondents finding Facebook and Twitter to be valuable. This can be reflected in the rather low use of social media platforms by COMCEC member countries (see Table 8). Gambia and Cote d'Ivoire maintain the most active social media presence – including size of community and frequency of posts. Like websites, the trend for most Africa group members is the double utilization of the Ministry of Tourism's platforms as official tourism platforms. Much like the challenges for the website, content is usually a mix of trade-related information and government news. All French-speaking countries that maintain a Facebook or Twitter account heavily utilize French content, limiting the appeal to a broader international audience.



**Table 7: COMCEC Tourism Working Group Members Destination Website Characteristics - Africa Group (Observed April 2015)**

Country	Image-Rich	Focus on Experiences	Customized	Dynamic Content	Social Media Integration	Press Section	Trade Section	E-Mail Capture	Concierge or Support	Responsive to Mobile
Burkina Faso	No	Yes	Yes	No	No	No	No	No	Yes	No
Cameroon	No	Yes	No	Yes	Yes	Yes	No	No	No	No
Gambia	No	No	No	No	No	Yes	No	No	Yes	No
Mozambique	No	Yes	Yes	No	Yes	Yes	No	No	No	No
Niger	No	No	No	Yes	No	Yes	No	No	No	No
Nigeria	No	No	No	No	No	Yes	Yes	No	No	No
Senegal	Yes	No	No	No	No	No	No	No	No	No
Uganda	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	No

Source: Created by the authors

**Table 8: OIC Member States Official Social Media Platforms Availability and Number of Followers - Africa Group (Observed April 2015)**

Country	Facebook		Instagram		Twitter		YouTube		Pinterest		Total
Benin	Yes	5,649	No	0	No	0	No	0	No	0	5,649
Senegal	Yes	7,987	Yes	37	Yes	2,958	Yes	90	No	0	11,072
Mozambique	Yes	8,083	No	0	Yes	427	Yes	146	No	0	8,656
Uganda	Yes	1,798	No	0	Yes	1,262	Yes	52	No	0	3,112
Nigeria	No	0	No	0	No	0	No	0	No	0	0
Burkina Faso	No	0	No	0	No	0	No	0	No	0	0
Cameroon	No	0	No	0	No	0	No	0	No	0	0
Niger	No	0	No	0	No	0	No	0	No	0	0
Gambia	Yes	19,066	No	0	No	0	No	0	No	0	19,066
Chad	Yes	75	No	0	Yes	5	Yes	0	No	0	80
Cote d'Ivoire	Yes	7,595	No	0	Yes	199	Yes	107	No	0	7,901
Gabon	No	0	No	0	No	0	No	0	No	0	0
Guinea	Yes	3,400	No	0	Yes	51	No	0	No	0	3,451
Guinea-Bissau	No	0	No	0	No	0	No	0	No	0	0
Mali	Yes	0	No	0	No	0	No	0	No	0	0
Sierra Leone	Yes	209	No	0	Yes	49	No	0	No	0	258
Togo	No	0	No	0	Yes	0	No	0	No	0	0

Source: Created by the authors

## ***Private Sector – Africa Group***

### ***Digital Literacy & Online Marketing Skills***

Upon probing the skills of their marketing personnel to competitively market their business online, 16.7% of the businesses completely agreed, 58.3% of the businesses at somewhat agreed and 25.0% of the businesses disagreed to having adequate skills. Moreover, half of the businesses (50.0%) do not even have a comprehensive online or digital marketing strategy.

Less than a fifth (16.7%) of the businesses do not have any online marketing personnel, but 50.0% of the businesses do have a full-time social media specialist, 41.7% have a full-time website specialist, 33.3% share responsibilities between individuals/departments and have a digital specialist, and 25.0% have an IT specialist.

### ***Public-Private Sector Cooperation***

Most of the African businesses that responded (83.3%) maintain a partnership with a national level tourism authority but very few participate in any of the activities they provide, such as training, website listing, co-operative digital marketing opportunities. Moreover, only half of the respondents find their destination's marketing effective. However, all respondents (100%) wished to strengthen their ties with the tourism authorities at a destination level.

All of the businesses (100%) wish for more opportunities to collaborate at a destination level. Those who have collaborated with the following groups, do find them valuable or extremely valuable: tour operator association (90.0%), hotel association (80.0%), DMOs (75.0%), international travel media (66.6%), travel media targeted within the home country (88.8%), and local media platforms (90.0%).

### ***Integrated Strategy & Use of Platforms***

While website (100%), social media (91.7%), online advertising (91.7%), e-mail marketing (81.8%), and third-party websites (83.3%) are all considered very important by African private sector respondents, significant gaps in regional capacity to deploy ICT-based tourism marketing have cited. (eMarketer, 2013; ICT Data and Statistics Division, 2015). Only half of African respondents in this region have a blog or a dynamic content functionality on their website while two thirds (66.7%) do not have a section on their website dedicated to information for travel trade or media. Over half (58.3%) of the businesses reported to collaborating occasionally with online travel writers and bloggers. Use of mobile devices and SEO strategies lag behind other regions as well.

On average, 19% of a respondents' total sales are made through their website with an average of 11% of the sales made through OTAs. Word of mouth and B2B connections still dominate as the most effective forms of marketing in Africa. Upon being asked of the main challenges to utilizing more online marketing in their efforts, "lack of know how", high "commissions" and "lack of online payment options" and "lack of financial and human capacity" were cited.

## 2.3 Factors Contributing to Success in ICT-based Tourism Marketing

Because nearly anyone can access online marketing material from anywhere on the planet, online tourism marketing is inherently global in nature. While certain challenges may persist with more frequency among certain OIC member regions (as illustrated in the previous section), the foundations of successful ICT-based tourism marketing are applicable for public and private entities in all OIC member countries. Section 1.8 provides examples of success factors based on current global trends in online tourism marketing. This section takes into consideration the overarching constraints faced by OIC member states' tourism businesses and tourism authorities implementing ICT-based marketing strategies and illustrates the three most important functional solutions that are universally applicable. These success factors ensure effective and efficient tourism marketing activities regardless of the size, location or sophistication of the tourism organization.

### *Comprehensive, Results-Oriented Digital Marketing Strategy*

As mentioned throughout this paper, digital marketing is rapidly changing the buyer experience. Where word-of-mouth from friends, family, and trusted travel agencies once dominated how people made travel decisions, the new digital landscape has created many new sources of information. Consumers can now easily compare prices, seek opinions from hundreds of people, and facilitate their own bookings.

ICT-based marketing has the power to influence the consumer more than ever, in fact consumers are now actively looking for the right information to support them making decisions that can be complex and risky. However, without a well-planned strategy, digital marketing can easily be unfocused, resource-intensive and ineffective. Lack of human and financial capital was consistently mentioned across all OIC member groups as a key constraint to fully leveraging ICT-based marketing solutions. Implementing a digital marketing strategy ensures that all activities are streamlined making best use of time and finances. Activities that are unsuccessful can be eliminated and retargeted towards those that are achieving the pre-defined goals.

Not only does upfront investment on a strategy reduce costs, a comprehensive integrated marketing strategy that considers every stage of the buying cycle can increase a company's profits by 20 to 30% (Edelman, 2010). Consistent application of brand messaging over a long period of time across platforms can better influence a traveler from the dreaming phase to the buying phase.

By identifying metrics of success for each component of the marketing strategy, human and financial resources can be more judiciously allocated. Activities that are underperforming can be altered or removed while successful campaigns can be extended or repeated.

### *Thoughtful, Customized Content*

Content is often the greatest challenge for digital marketers, especially for resource-constrained tourism authorities and travel businesses. After advertising costs, content creation is the second biggest cost for digital marketing (Gartner, 2013). As consumers more actively engage with travel brands, digital marketing strategies can ease the content burden by

incorporating elements that actively engage the growing number of consumers that want to engage with travel brands.

As mentioned in Section 1, travel consumers have become increasingly demanding of tourism websites and social media platforms in terms of content that is highly relevant to their needs. Users may quickly lose interest if a website is not navigable or if social media messages are intended for a different audience. This is particularly relevant for destination promotion platforms where many OIC member countries – especially those in developing economies – utilize Ministry platforms that highlight trade shows or press conferences that are not relevant to travelers.

The website is arguably the most important ICT-based tourism marketing tool for most tourism businesses and destinations. It is a virtual storefront and is the terminus for most marketing activities. Successful websites, regardless of financial investment, should contain content that is relevant and accessible for the audiences in which they target. For tourism businesses, this means a clear articulation of services provided. For a destination this means inspirational and informative messaging about the place's experiences.

Key content considerations:

- Available in the language of the target audience or available in multiple languages
- Easily navigable based on interest or topic
- Aligned for the audience (consumer, trade, media), for example does not mix information about trade shows with messaging for consumers
- Readable on multiple devices (desktop and mobile)

Content is the voice of the tourism business or destination and therefore an extension of the brand. Therefore the content's style and tone should be an important consideration of the digital marketing strategy and be consistent across all platforms.

### Destination Collaboration

Tourism, by its very nature, is an industry that thrives upon collaboration. As much as a visitor cannot experience the destination without access to services, a tour operator or accommodation provider is more likely to attract high-quality visitors if a destination is well-managed. Packaging and programming are inextricably linked in tourism. This comprehensive destination management approach is also valid for digital tourism marketing.

Consistently among all OIC member groupings, both tourism businesses and tourism authorities demonstrated a desire for closer cooperation.

Public-private partnerships create synergies around content development and create models for sharing advertising and promotion costs. Key opportunities for public-private cooperation for ICT-based tourism marketing include:

- Destination website directories
- Content sharing (websites, social media)
- Cooperative advertising marketing

- Familiarization trips for bloggers and online influencers

Public-private partnerships are essential in sustainable ICT development as well. As the adoption and diffusion of skills (eLearning Africa News Portal, 2015; International Telecommunication Union, 2013; and International Telecommunication Union, 2015). Case studies from Oman found later in this paper illustrate cooperation between the national governments and telecommunications organizations that have extended the availability of broadband connectivity as well as improved the environment for digital literacy. Stakeholder buy-in is crucial to ensure ICT projects are a success and widely accepted and adopted.

A deliberate, cooperative arrangement between national tourism authorities (public sector) and the private sector members of the tourism industry around ICT-based tourism marketing has innumerable benefits:

- Strengthens and enhances the destination brand through sustained, coherent messaging
- Reduces costs for content creation and advertising
- Maximizes the reach among valuable target market segments through cross-promotion
- Creates a clear “sales funnel” where potential visitors are inspired by the destination and are able to book with a supplier
- Opportunities to share digital marketing know-how and skill through collaborative training
- Data sharing about online behavior of key target markets
- Minimize seasonality effects by developing promotions that can be cross-promoted among different platforms

### Case Studies

Case studies are included in this paper as a means to depict how tourism authorities and tourism business in COMCEC Tourism Working Group countries are applying the success factors listed in this section and throughout Section 1. Most cases demonstrate innovative use of platforms, and well-planned strategy that integrates multiple platforms and considers all stages of the traveler’s buying cycle. In some cases – particularly those of Mozambique and Saudi Arabia - government policy impedes the realization of best practice by tourism authorities and tourism businesses. Policy recommendations are made at the end of the paper for all OIC member state governments that can minimize the impediments and deliver a fertile environment for effective ICT-based tourism marketing.

## 3 Case Studies

### 3.1 Case Study: Nigeria

Tourism has recently become a priority industry for the Nigeria government as it seeks to diversify its economy.

Nigeria's economy continues to grow, bolstering a burgeoning middle class. In addition to an international tourism marketing strategy that has been put into place, the Nigerian Tourism Development Corporation (NTDC) has placed specific emphasis on supporting the growth of the domestic tourism market. Currently 15% of the 173 million population already travel throughout the country for business, leisure, religious or sports reasons, generating an estimated \$4 billion in revenue (Euromonitor, 2014; Babatunde, 2014). Nigeria's domestic tourism strategy aims to use ICT-based tourism to strengthen those numbers and grow the economic impact of the domestic tourism market.

Nigeria is home to one of Africa's most connected populations, with nearly 82 million people connected via broadband mobile devices (Chidebere, 2015; Nigerian Communications Commission, 2015). As a result, online shopping and e-commerce opportunities continue to expand. Nigeria also leads Africa with the largest number of regular Internet users (56 million) and active Facebook users (11.2 million) (Boateng, 2014). The recent creation of a new Ministry of Communication Technology signaled a focus by the Federal Government to expand and strengthen ICT infrastructure throughout the country while reducing access costs. Building on this momentum, the NTDC has deployed notable ICT-based tourism marketing efforts that expand international and domestic awareness of the destination. Initiatives were completed through inter-ministerial cooperation and by leveraging private sector partnerships, reducing costs and building expertise.

#### ***Online Media***

In June 2013, Nigeria launched its new tourism brand, "Fascinating Nigeria", believing that the new brand and all of its components – including a new online presence - would be an "important milestone in [Nigeria's] drive to achieve sustainable transformation" (This Day Live, 2013).

Figure 9: Fascinating Nigeria Homepage



Source: [www.fascinatingnigeria.com](http://www.fascinatingnigeria.com)

A key component of the new brand was a new magazine designed to showcase Nigeria's tourism assets, talents and culture. While a printed version of the magazine is made available throughout the country, in embassies, on airlines, in airport lounges, and at various bookstores content is also made available online. Fascinating Nigeria provides a well-designed, informative, and regularly-updated source of inspirational tourism information that appeals to domestic travelers in the dreaming and planning phase of the travel decision making process.

Sections highlight unique destinations, insights into cultural practices, descriptions of upcoming events and a listing of hotels, restaurants and nightlife throughout the country. Articles are written in both a 3<sup>rd</sup>-person journalistic point of view as well as first-person editorial style. Photography is a blend of proprietary images and stock images.

Content for the Fascinating Nigeria magazine is created by a local publishing firm working in partnership with the the tourism authority. The website is maintained financially through advertising sales which creates an incentive for the local business and offsets any costs for NTDC. Advertisements are available a cost of £55 - £300 depending on size of advertisement and length of display (Fascinating Nigeria Magazine, 2013).

### ***OTA Partnership***

To create additional online sales and booking opportunities, the NTDC signed an official partnership with online tour operator (OTA) Jovago.com in June 2014 to create an e-commerce functionality of the official Nigeria Tourism website. The new functionality creates access for online visitors in the planning and booking phase to over 4,000 hotels across the country. In addition to driving e-commerce, Jovago will support NTDC in ensuring that their website is in line with international best practices for destination marketing. (Humanipo, 2014; Techloy, 2014)

### ***Travel Information Desks***

In an attempt to encourage additional travel throughout the country, strengthen domestic tourism and improve the visitor experience, the NTDC has ICT-enabled visitor information desks at major transportation gateways throughout the country.

Two desks are located in the Murtala Muhammed Airport in Lagos, the country's main international gateway, and one is located in the domestic terminal of Nnamdi Azikiwe Airport in Abuja (The Guardian, 2015). The space was identified for use of the new information desks through a partnership between NTDC and the Ministry of Aviation (Ajayi, 2015).

NTDC has partnered with Viko Nigeria, Ltd., a car hire company to conceptualize and manage the desks that will feature an online portal with access to tourism sites, activities, products, hotels, car hire services, events and festivals as well as real time flight information. The information desks will also be a point of sale for visitors to book excursions. The portals will include content on lesser-known local destinations and attractions. Plans are currently under way to expand the desks to all airports within the country in an effort to expand domestic tourism, which is a priority for NTDC.

### ***Key Lesson Learned***

The Nigeria Tourism Development Corporation (NTDC) has utilized an integrated traditional and online marketing strategy to build and activate a destination brand that is appealing to both international and domestic tourists. In order to minimize cost and extend the marketing message at all phases of the travel buying cycle, the NTDC sought and specialized expertise in partnership with the private sector. Partnerships with local content developers, and international distribution platforms have created digital touch point to facilitate the travel experience from the dreaming, planning and booking phases of the travel to decision making process. Additional partnerships with local tourism providers established a way to engage travelers during the experiencing phase.



### 3.2 Case Study: Azerbaijan

Azerbaijan has experienced enormous economic growth in recent years. Like many other oil-driven economies such as Nigeria and the UAE, Azerbaijan is turning both to ICT-development and tourism as options for diversification. In the case of Azerbaijan, particular attention has been paid to the meetings and events segment.

Since 2003, Azerbaijan has embarked on an ambitious plan to expand ICT and ensure that it is a leading performer among neighboring countries. As a result, the ICT sector grew doubled in size every three years between 2004 and 2013 (UNDP) and Azerbaijan now has an Internet penetration rate of nearly 70%. Investment in infrastructure and incentives for technology communications have seen connectivity speeds increase by 2.2% in 2012, while progressive tax structures and liberal economic regimes have seen prices continue to fall – featuring an average cut of 35% in 2011 (World Economic Forum, 2015; East Horizon, n.d.)

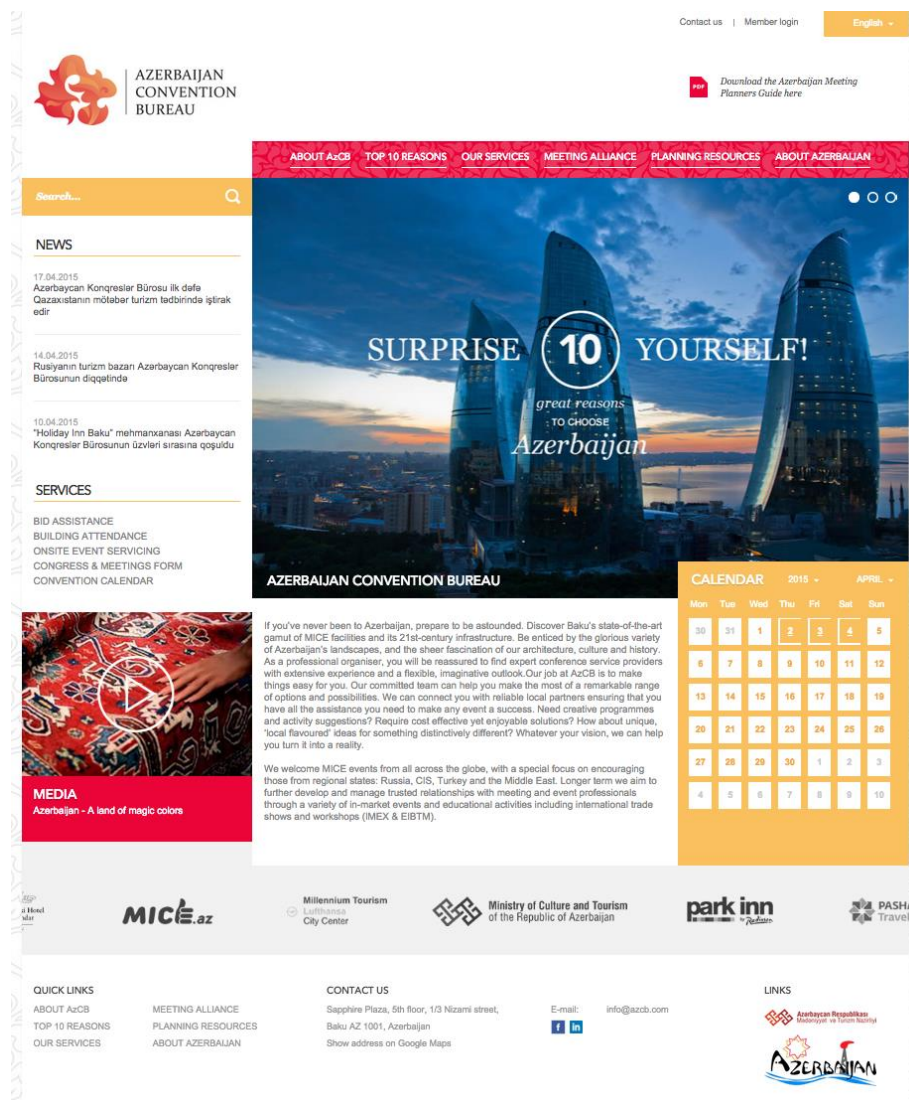
#### *Focus on Events*

Azerbaijan has invested significantly in growing its tourism economy by attracting high-profile meetings and events. One of the most highly recognizable was the Eurovision Song Contest in 2012 that was seen by 102 million people television watchers in 27 countries – including several others that viewed the programming online. Recently, Baku hosted the European Games featuring over 6,000 athletes.

However, Azerbaijan is not focused only on mega-events. The Azerbaijan Convention Bureau (AzCB) was created by the Azerbaijani government as a non-profit organization to build collaboration between the private and public sector to market the country's meeting and convention market.

In 2012, approximately 30% of Azerbaijan's 2.48 million international tourism arrivals came for business purposes. Several important regional and international meetings have been held in Azerbaijan including meetings of the World Economic Forum, Annual Meeting of the Islamic Development Bank, the Crans Montana Forum, and the Annual Meeting of the Black Sea Trade and Development Bank. In 2015, Baku will be the host of the Annual Meeting of the Asian Development Bank, expected to draw several thousand delegates (AZPromo, 2014).

Figure 10: Azerbaijan Convention Bureau Website



The AzCB uses highly-visual, place based content as part of its ICT-based tourism to attract meeting planners and producers. While facilities, transportation and accommodation are primary factors contributing to a meeting planners choice, the brand of the city can have a significant impact on helping to choose between one destination or another (Marketing Challenges International, 2013).


The AzCB maintains a multilingual, visually-stunning website with detailed information on the country's MICE resources. Because meeting planners are often influenced by the tourism attractions of the destinations outside of the meeting venue, AzCB uses the website to highlight why Azerbaijan would be positive and engaging experience for meeting and event delegate.

Included on the website are:

- An engaging “Top 10” list of reasons to plan a trip to Azerbaijan
- An accessible media gallery that planners can use in their media marketing
- A comprehensive inventory of Azerbaijan’s tourism attractions with tips on how to experience them for 15 minutes, one hour, or two/three hours
- A calendar of events throughout the country

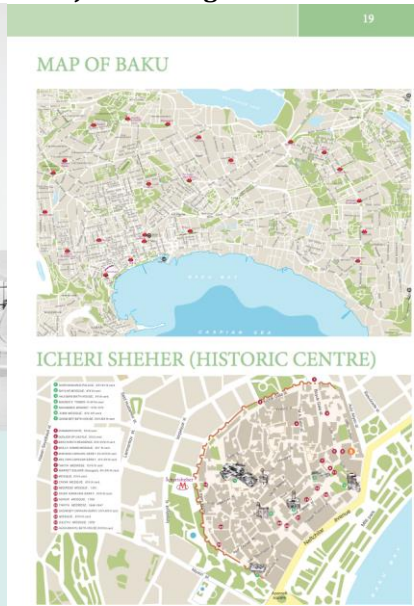
The AzCB also provides a downloadable meeting planners guide with detailed information about the country’s attraction, hotels, local meeting planners and meeting venues.

**Figure 11: Digital Version of Azerbaijan Meeting Planner's Guide 2015**



**AZERBAIJAN MEETING PLANNER'S GUIDE**  
2015

AZERBAIJAN CONVENTION BUREAU




MAP OF BAKU

ICHERI SHEHER (HISTORIC CENTRE)

59

IMPROTEX TRAVEL TOURS & CONFERENCES

35



Created in 1991, Improtex was the first private travel company on the territory of sovereign Azerbaijan. Improtex Travel is a member of ASTA, JATA, International Group of Silk Route Tour Operators (SIRTOUR), AZTA (Azerbaijan Tourism Association) & a General Partner and Coordinator of the Best Eastern Hotels (Russia) in Azerbaijan.

Improtex Travel has 6 subdivisions with an overall number of about 40 persons in the working team. Most of multilingual staff has high qualification and practical experience in the field of international tourism. Top company managers have had special training in tourism management from various leading institutions of Europe and Asia.

Activities over a specified time really reflect the development of tourism in Azerbaijan and offer a full range of services for the organization, implementation and supervision of activities of any complexity and purpose, organized by the state, public or private entities.

MICE services:

- Individual approach to every request
- Selection of places, logistics and support
- Development of concepts and programs of measures
- Provision of qualified guides and actors of the event
- Development of team building, entertainment programs and creative quests
- Hotel bookings and provision of transfer services
- Gala dinners and excursions
- Maintenance and control measures of all stages
- Customer service 24 hours

More information at [www.azerbaijan.improtex.travel](http://www.azerbaijan.improtex.travel)

improtex TRAVEL since 1991

Fairmont Baku - Meeting Capacity (persons)					
	U-shape	Theater	Classroom	Banquet	Cocktail/ Reception
Grand Ballroom (A,B,C & D) NIZAMI GANJALI (A,B,C & D)	-	840	610	720	950
Grand Ballroom A NIZAMI GANJALI A	70	300	220	252	340
Grand Ballroom B NIZAMI GANJALI B	70	240	190	216	270
Grand Ballroom C NIZAMI GANJALI C	70	300	220	252	340
Grand Ballroom D NIZAMI GANJALI D	106	420	305	360	475
Grand Ballroom E NIZAMI GANJALI E	106	420	305	360	475
Junior Ballroom 1 UZEYR HAJIBEYOV I	32	90	60	72	90
Junior Ballroom 2 UZEYR HAJIBEYOV II	32	90	60	72	90
Junior Ballroom 3 UZEYR HAJIBEYOV III	65	180	120	144	180
Meeting Room 1 GARIBALDI	18	55	26	36	50
Meeting Room 2 SATTAH BAHUZZADE	40	112	52	72	80
Meeting Room 3 HUSEYIN JAVID	18	55	26	36	50
Meeting Room 4 FIKHAT AHMEDOV	18	55	26	36	50
Board Room 1 RASHID BEHBUZOV	-	-	-	-	-
Meeting Room 5 BAKHADOV NASIR	40	121	52	72	110
Meeting Room 6 JAFAR JABBARLY	26	55	32	48	50
Meeting Room 7 MUHAMMAD FUZULI	18	60	26	-	-
Board Room 2 NABIGADIN TUBI	10	-	-	-	-

From the website, AzCB collects email address for a regularly delivered newsletter that provides updates on venues and upcoming events.

The Azerbaijan Convention and Visitors Bureau also maintains a vibrant social media presence. A succinct report from Marketing Challenges International (2013) lists social media as one of the most valuable, low-cost means to attract and inspire meeting planners as well as help meeting planner promote their events (otherwise known as “delegate boosting.”). On Facebook, AzCB provides snapshots of meetings and events in Azerbaijan content related to the country’s presence in International tourism fairs, and relevant meeting planning advices.

In July 2015, AzCB launched a new mobile application for meeting planners designed to aggregate all destination information into one easy-to-access location. The applications contains six main categories: About Azerbaijan, Meetings Industry Suppliers, Connectivity, AzCB Support Services, References and a contact feature that allows planners to deliver real time requests for proposals to the AzCB. The app also has an interface for meeting attendants that allows them to navigate their agenda and provide instant feedback.

### ***Key Lesson Learned***

Meetings and Event planners have the ability to facilitate a valuable contribution to a tourism economy. Their sales cycle and destination discovery mirrors that of the leisure travel. Azerbaijan Convention and Visitors Bureau has deployed an easily navigable information and contact platform to communicate with the target audience about Azerbaijan’s meeting assets. Planning materials support the decision making process while innovative mobile programming enhances the experience.

### 3.3 Case Study: Saudi Arabia

Saudi Arabia has been an important global destination for over a millennia due to its important cultural and heritage assets. Religious visitors arriving in the country to complete the annual pilgrimage of *Hajj* continually increase, surpassing 2 million in 2002 and surpassing 3 million in 2012 (Al Arabiya, 2013). During a period of one week, the Saudi government efficiently moves and manages significant amounts of people to and around the holy city of Mecca. This event is a significant revenue generator for the Kingdom, earning approximately \$8.5 billion in 2014 (Al Arabiya, 2014). This is just a percentage of the larger religious tourism market that has contributed a total of \$16.5 billion to Saudi economy (ITP, 2012). Tourism as a whole is taking an increasingly dominant role in the oil rich state. The Saudi Arabian Monetary Agency is expecting that the tourism industry will support nearly 1.8 million jobs by 2020, nearly triple its current amount (Saudi Arabian Monetary Agency, 2014).

The logistical challenges associated with managing pilgrimages and handling the needs of religious tourists has spurred numerous improvements to the local ICT infrastructure and the Saudi government has actively encouraged the private sector to invest in expanding the tourism industry as a means to generate additional jobs.

Despite a captive market and a digitally literate workforce, there are limited ICT-based solutions for marketing toward visitors or enhancing their experience once arrived. One suggested reason is that incentive remains low for tourism marketing innovation due to restrictive visa policies that limit international leisure visitation. However, there are signs that this could be changing (Arab News, 2014). Research from Brdesee et al (2012) suggests a number of cultural factors – including resistance to change and a focus on private - that have limited large scale innovation. For the Kingdom's signature event, restrictions still remain in place. The Ministry of the Haj retains tight control over private sector handling pilgrims for security and health reasons. Regarding the *Umrah*, a main online portal called the *Makha'a* links all stakeholders, internal licensed *Umrah* agents and external travel agents with the Ministry of Hajj and the Ministry of the Interior in one information system. There are five *Makha'a* Internet providers and approximately 40 *Umrah* agents licensed by the Ministry of Hajj. The Saudi government mandates designated *Umrah* pilgrimage providers to work online with their international dealers because local travels are not authorized to offer *Umrah* services directly to external pilgrims (Brdesee et al., 2013).

The ICT-based initiatives by the Saudi Commission for Tourism and National Heritage (SCTA) are notable for enhancing the visitor experience and better internally marketing the assets of the destination.

In June 2014, the SCTA created a round the clock operations room that tourists can reach by telephone by dialing 19988 or through a specialized form on the website. This initiative is intended to increase visitor satisfaction and address any complaints. The "Tourism Navigator" provides real time, GDS-enable tourism information for smartphones on accommodations, attractions, and road networks. Virtual tours are also available for some of the Kingdom's most recognizable sites. Content is available in both English and Arabic.

### ***Key Lesson Learned***

Despite large tourism volumes, the development and deployment of ICT-based tourism marketing can be challenge in certain regulatory and cultural environments. Saudi Arabia’s admirable investment in tourism development around cultural and natural heritage can be amplified through a reduction in regulation of the private sector and the creation of financial incentives to innovate in order to attract more international visitors and encourage broader travel within the country. Positively, through its online customer relations portal and telephone hotline the SCTA has placed a focus on the visitor experience, a significant contributor to word of mouth marketing.

**Figure 12: Saudi Arabia Tourism Navigator Mobile App**



### 3.4 Case Study: Turkey

Turkey is one of the world's leading tourism destinations, attracting approximately 40 million visitors in 2014 and earning \$34 billion in tourism revenue. The Ministry of Culture and Tourism is one of the world's most sophisticated destination marketing operations, consistently producing effective and evocative campaigns. – winning the World Travel Award in 2012 for Europe's Leading Tourist Board

Turkey Home is the country's most recent integrated tourism marketing campaign – launched in 2014 and rolled out globally - ably uses all of the major digital marketing channels as part of a comprehensive suite of marketing activities to showcase the destination's tourism product diversity and target multiple niche markets all while maintaining brand consistency across channels. The result is marketing campaign that is at once flexible and customizable.

The Ministry of Culture and Tourism (2015) has articulated one key goal of the Turkey Home campaign is to strengthen the country's social media communities while building strong visual awareness of the destination.

Visual content plays an important role in the campaign and four world-renowned photographers have been invited to participate.,

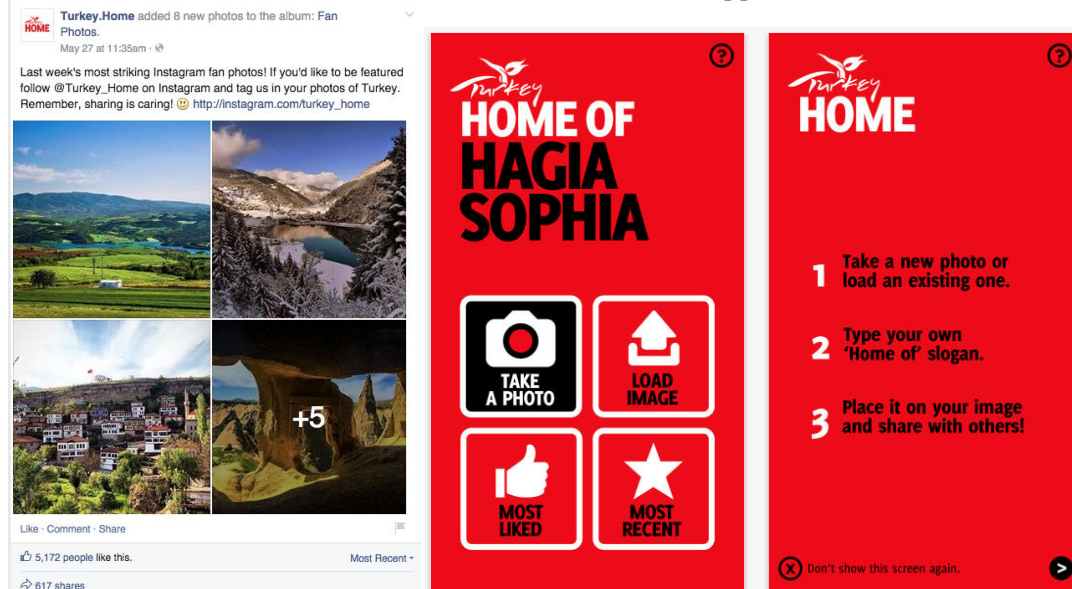
**Figure 13: Turkey Home Website & Social Media Channels**



The Turkey Home channel strategy is anchored by a central website with a bold photo and links to each Turkey Home social media platforms: Facebook, Twitter, YouTube, Instagram Pinterest YouTube, and LinkedIn. Striking photos with a small label that explains the location and an appropriate appear regularly in multiple channels, supplemented by channel-appropriate content such as retweets, shared posts, and re-grams.

The campaign actively integrated user-generated content from a variety of sources. Instagram posts with hashtags #Turkey #Homeof are re-grammed and also featured regularly on the Facebook page and Twitter feed. A streamline mobile app that encourages current or previous visitors to Turkey to upload their own photos of the country with a unique “Home of” slogan. Users can then view what others have uploaded. (Figure 15).

**Figure 14 Turkey Home UGC Tools, Facebook and Mobile App**



### **Key Lesson Learned**

As articulated in Section 1, a comprehensive marketing strategy that integrates multiple platforms is a foundation of effective and efficient ICT-based tourism marketing. Multi-channel marketing efforts – when designed and implemented cohesively – can significantly drive brand awareness.



### 3.5 Case Study: Egypt

Egypt's tourism industry has seen strong variations in international tourism arrivals since 2009. In the first quarter of 2014, tourism revenue is said to have dropped a significant 43%, which contributes over 10% to GDP (Sleiman, 2014).

In order to hedge against the elasticity of demand from North American, European, and other long haul markets that comprise 70% of total international visitation, the Egyptian Tourism Ministry launched a cross-platform marketing campaign targeted at short haul markets in the Gulf Cooperation Council (GCC) around the important holidays of Eid and Ramadan. In addition for adding volume, Arab visitors are perceived as higher-spend travelers than other markets that are most price sensitive and traveling on packaged tours. With the campaign, it is expected that the incoming market would spend money shopping, dining and enjoying the luxury entertainment experiences that could provide the economic boost needed during the dip in tourism. (Berger, 2014).

The Masr Wahashtouna ("Egypt, We've Missed You") campaign had three targeted phases: an awareness phase (aligned with the dreaming phase of the 5 stages of travel) and active calls to action during Ramadan and Eid. The campaign focused on the natural landscapes, cultural experience and a sense of sentimentality from other Arab states (Zawya, 2014).

According to Entourage, the Dubai-based company responsible for the campaign, content and messaging customized to emotional sensibilities of the target market was central to the success of the campaign. Even the title of the campaign used a colloquial version of Arabic that generated positive sentiments (Albawaba, 2014). Imagery of a luxurious, family-friendly with excellent entertainment, dining and retail options were promoted through a blend of ICT-based tourism marketing (online video, Facebook, Twitter and Instagram) and traditional outbound marketing (billboards, television spots).

Figure 15: Egypt Arabic-language website



Source: [ar.egypt.travel](http://ar.egypt.travel)

According to Elevate Media, the Dubai-based marketing company that assisted the implementation of the program, hotel occupancy increased 70% during the pre-Eid phase, reaching 100% during Eid throughout Egypt. The campaign was also responsible for an increase of 40% in Middle East visitors during Ramadan (48% from the UAE market, 28% from Saudi Arabia, and 37.5% from the Jordan market), returning Egypt into one of the Middle East's region's top 5 tourism destinations (Communicate, 2014).



***Key Lesson Learned***

“Masr Wahashtouna” was a staggering ICT-based tourism marketing success for the Egyptian Tourism Authority. The success resulted in the identification of a clear target market, understanding of appropriate messaging, development of customized content, and the delivery along multiple channels.

### 3.6 Case Study: Mozambique

The following case study examines how ICT-based tourism marketing solutions are deployed around protected areas, of which there are many in the OIC countries. Mozambique presents a particularly interesting case on how public-private partnership can manage and promote its national parks.

#### *Tourism Sector in Mozambique*

The Republic of Mozambique has seen its tourism industry grow in number of tourism establishments and number of inbound visitors since 2005. The country's tourism industry is private sector-led; it is the private sector that engages international tour operators to send tourists to their respective establishments. Mozambique is marketed as a barefoot leisure destination most famous for its long deserted beaches and its blend of Lusophone and local African culture.

Significant investment in the tourism sector began in 1994 with 90% of the investors coming from South Africa. In 2000, a standalone Ministry of Tourism was created and mandated to develop the sector in terms of laws and regulations, protected areas, classification of hospitality establishments and encouraging investment in the sector. In 2015, the Ministry of Tourism and the Ministry of Culture were merged.

Prior to the merger, the National Conservation Areas Management Agency (ANAC) was under Ministry of Tourism. It has now been moved to the Ministry of Land, Environment and Rural Development. Though a semi-autonomous body which is expected to generate some of its own income, it is now answerable to a new ministry. The operational structures and objectives are still being created, as is the strategy for communication and marketing. At this point, though there is one member of staff appointed to deal with communication and marketing, it has no online presence (no website or social media page).

The most important sources of visitors in terms of sheer numbers is Africa with South Africa being the most significant source of leisure tourists, followed by Europe then America and finally Asia (Table 9). Though arrivals had shown a steady increase since 2004 there was a decrease in 2012-2013. The causes of the decrease in tourist arrivals between are varied and include the reduced direct airlift between Mozambique and Europe and an unfavorable currency exchange rate between the South African Rand and the Mozambican Metical.

**Table 9: Visitation to Mozambique, 2010 - 2013**

	2010	2011	2012	2013
<b>AFRICA</b>	1,465,793	1,584,095	1,580,523	1,411,327
South Africa	946,583	950,941	971,868	872,017
<b>AMERICA</b>	102,041	106,670	135,488	120,985
U.S.A.	61,825	36,228	76,603	68,403
<b>EUROPE</b>	219,089	284,493	444,506	396,921
Portugal	25,810	67,214	86,504	77,244
United Kingdom	50,420	70,442	57,322	51,186
Germany	23,409	11,625	11,985	20,940
<b>ASIA</b>	28,211	33,293	28,661	25,593
<b>TOTAL</b>	<b>1,836,143</b>	<b>2,012,640</b>	<b>2,205,853</b>	<b>1,969,716</b>

Source: National Statistics Institute

### ***ICT Framework***

Connections to the Internet are readily available in Mozambique, with a greater variety of services available for urban areas than for protected areas or beach and bush destinations where many tourism resorts are found. Within the urban areas, the national telecommunications company, TDM (Telecomunicações de Moçambique) provides broadband ADSL (Asymmetric digital subscriber line) as well as 3G flash drive modems.

There are three mobile phone companies, MCell, Vodacom and Movitel, currently operating in Mozambique that also provide mobile internet access. 68.7% of those accessing the internet do so through smartphones, 56.8% of these use 3G flash drive modems, while only 4.5% use ADSL connection (Mabila, 2013). The statistics on internet penetration indicate that only 5% of the population of Mozambique uses the internet, compared with 33% mobile telephone penetration. Prepaid internet access is more affordable than postpaid (or contracts), but internet access in general is still considered “too expensive” for most people to afford. (Mabila, 2013).

### ***Government involvement in ICT marketing***

Destination marketing of Mozambique is the mandate of the national tourism institute (INATUR), Mozambique’s tourism destination management body. INATUR has recognized the importance of ICT, developing a digital marketing strategy that recommends outsourcing the management of its website and social media platforms (Facebook, Instagram, Youtube, Twitter) to a locally-based public relations company. It also plans to contract W.A.Y.N – a travel and lifestyle social networking website – to promote Mozambique as a holiday destination for the network members to visit. The emphasis in INATUR’s digital marketing strategy is on good management and constant updating of the organization’s website and social media platforms. The destination management organization has had two previous unsuccessful experiences with outsourcing the management of its digital platforms, learning the value of closely monitoring selected service provider.

Travel fairs and regional roadshows are an important component of INATUR’s tourism promotion activities. INATUR invites private sector to exhibit their product at the official Mozambique stand. Private sector establishments select which trade fairs and roadshows they will attend depending on their target markets. INATUR has been able to discern which markets prefer more traditional brochures and print matter (the regional southern African and Mediterranean markets), and which markets prefer digital material or website addresses (ITB and WTM London), and has developed its content to address these market needs.

INATUR’s destination promotion does not focus on any specific regions or areas, instead focusing on B2B activities designed to attract global tour operators to sell Mozambique. The National Conservation Areas Management Agency (ANAC – Administração Nacional de Áreas de Conservação), a semi-autonomous body previously under the Ministry of Tourism but now under the Ministry of Land, Environment and Rural Development, is mandated to promote national protected areas. The operational structures of ANAC which include communication and marketing strategy are being finalized so it currently has no online presence through a website or social media.

## **Successful leveraging of ICT for protected area promotion: Gorongosa National Park & Bazaruto National Park**

### **Gorongosa National Park**

The Gorongosa National Park (GNP) is located in a remote site 1,200km north of Maputo. GNP is a public-private partnership that involves the government leasing the management of Gorongosa National Park to the Carr Foundation for a period of twenty years beginning in 2008. The distance from urban areas means the infrastructure for ICT connection and the choice of service providers for ICT needs are limited. They use primarily TDM's broadband Internet connection 80% of the time, and supplement it with 3G modems provided by cell phone companies 20% of the time. The primary challenge around ICT connectivity and consistent, proactive publication in channels is the limited bandwidth and the slow speed of the internet.

Despite these shortfalls in ICT support infrastructure, the communications department has been able to make GNP the country's most successful example of leveraging ICT in the promotion of protected areas. The communications department is regularly active in promoting the park, using both social media and traditional email mailing lists to keep its global audience updated. For example, any new developments in the park in terms of service or animal behavior will be announced via Facebook, the park website, and the park newsletter. The communications director of the Park is recognized – by both public and private sector – to have an excellent database of email addresses of influential national and international stakeholders (public sector, corporations, and world media). The material selected for sharing with this audience is also positive and highlights the progress being made despite the challenges, thereby keeping Gorongosa National Park in the public eye.

### *ICT-based Marketing Platforms*

GNP has a profile on a total of seven platforms (website, blog, Youtube, Facebook, Tumbler, Pinterest, Twitter, and an email newsletter), but is most active in terms of providing updated information or responses on three of these, namely the website, newsletter and Facebook page. The website receives over 100,000 visits a year. In both the website and the Facebook page, Portuguese (from Portugal) visitors make up about 40% of the visitors. With regards to real tourist numbers, 50% of those who visit GNP are from the southern African region (Mozambique, South Africa, Zimbabwe), while the remaining 50% are mainly from Portugal, USA, UK, Spain, Germany, Brazil, Italy and China.

The website is organized around the compelling story of how the park that is being restored by an American philanthropist, travel logistics, accommodation options and activities. The website highlights the ecotourism theme and that visitation directly contributes to the continued existence and its ecosystem. The website uses community voices to capture the attention of those concerned that their travel to a destination should have a positive impact. It also provides visitors to the park an opportunity to share their experiences.

The Facebook page of Gorongosa National Park has a community of 42,959 as of April 2015. In an excellent example of partnering for content, students, staff, journalists and scientists publish post about the park's activities and taking pictures of animals, communities and visitors. They provide updates on significant milestones of the park, communities or information and stories relevant to GNP. These are communicated using a mixture of

community voices, scientists and park staff. The Facebook page has proved to be an effective medium through which prospective clients with questions, suggestions or complaints express them and receive a timely response from the communications director.

#### *Other promotion and marketing tools*

Gorongosa National Park leverages the offline methods of placing promotions, advertisements, and stories about the park in magazines, newspapers, and on television stations. When GNP began promoting the park, they invited television stations and magazines from Europe, Asia, North America, and Latin America. Those who were interested visited the national park and produced segments for their stations which created interest in the park in the respective countries. As a result of these visits and their own efforts, Gorongosa National Park has a gallery of videos and documentaries promoting the park. They have also published and promoted a number of books on the different aspects of the park. Though these media are mainly offline, copy is repackaged and published in all ICT platforms. Furthermore, the documentaries shown on National Geographic Channel or on the various television stations from Brazil, Portugal and the USA that have visited the park usually include the website URL.

Though they use a mix of ICT and off-line, more traditional promotion methods, GNP has been able to track the impact of all these efforts via ICT through the analytics of their website and Facebook page. Whenever a program or documentary about Gorongosa National Park is broadcast in a country, its reach and response is reflected mainly in an increase in traffic to the website from the targeted audience.

Gorongosa National Park is a sharing exhibitor at INATUR's official Mozambique stand at travel fairs. It attends the following travel fairs: ITB (Germany), WTM (UK), BTL (Portugal), INDABA (South Africa) and Descubra Moçambique (Mozambique). It will occasionally also collaborate with government or other members of the private sector on a specific event. In preparation to attend the travel shows the communication department will post on the GNP Facebook page the name of the travel fair and dates it will be present. They also take pictures at the travel fair and post them on the Facebook feed. For every public appearance, GNP takes along DVDs about Gorongosa, as well as information of how those wishing to visit can get in touch with Girassol Gorongosa – the sole accommodation providers for the park – to book their trip.

#### *Innovation*

GNP has shown great innovation in the area of fundraising, through the creation of the Gorongosa Business Club. They have approached companies and diplomatic institutions to sponsor one of six (6) areas of research:

- Lion research,
- Elephant research,
- Vulnerable Children Education,
- Anti-Poaching unit,
- Scientific Services,
- Wildlife Sanctuary Management,

for four (4) years at an annual rate of USD\$25,000. In exchange for the commitment, the company receives a package that includes branded pointer/USB pens, and a plaque recognizing the company for supporting Gorongosa National Park and the community therein.

Most significantly, each member of the Gorongosa Business Club makes a two minute video explaining why their company is supporting Gorongosa National Park. These videos are then distributed across the park's ICT channels.

GNP produces a weekly televised program - on national TV channel STV - that highlights the activities at the park. It is also a significant learning platform for park managers from other national protected areas.

### **Bazaruto National Park**

#### *Azura Benguerra Island*

The Azura Retreats is a collection of three boutique hotels, one of which is the Azura Benguerra Island retreat. Azura Benguerra is located on Benguerra Island within the Bazaruto National Park. Primary markets for the destination are the USA, UK, South Africa and Germany. Most of their business (90%) is generated through contact with the travel trade while 10% is from direct contact with the consumer.

#### *Connectivity*

Their communications and marketing department is located in Johannesburg and is satisfied with the ADSL WiFi service provided by Telkom, South Africa. The main constraint they experience in South Africa is related to interruption of power supply.

#### *ICT-based Marketing Platforms*

Though it has a profile on seven ICT platforms (Pinterest, Twitter, Trip Advisor, Google Plus, Youtube, Facebook: AzuraRetreats, website: [www.azura-retreats.com](http://www.azura-retreats.com)), Azura Retreats is most active on their website and Facebook. The website receives an average of 4,000 visitors per month and features the three boutique Azura Retreat properties, the experiences the client can expect, mechanisms through which visitors can support the host communities, promotional offers, and allows you to make a reservation. The warmth and personal touch of the Azura product is communicated through a narration of how the managing couple met and why they built the product as it is.

The Facebook page has 8,360 likes and provides links to the Twitter feed and Trip Advisor reviews. The content featured here is woven around the themes of food and drink, private beaches, people enjoying their holiday, and wildlife or marine life. Their specials and promotions (those sent to magazines) are also featured, always including an email address to which enquiries may be sent. The positive reviews that are posted on Trip Advisor are part of the content here. Community voices and cultural encounters as themes are included through images of cultural dances, members of the community carrying seafood along the beach. Activities of the Rainbow Fund – the Azura Retreats charity - to which visitors contribute, are also included in this Facebook feed. Though videos showing wildlife and underwater life are included, the same videos are also posted on the other digital platforms. It is important to note that the Facebook page manager is always at hand to respond to any comments or enquiries on a post.

Despite their presence on multiple ICT platforms, Azura Retreats does not get a substantial amount of direct business through the online platforms. The majority of their bookings, 90%, are received through the travel trade – tour operators based in the international markets that contact and book through local inbound tour operators. Their ICT media is therefore a support



mechanism in their promotion efforts and is most useful to tour operators who log on understand the tourism product offered. For the individual consumer who has already booked, the website provides a visualization of what to expect as they prepare to travel there.

The success of the ICT media is measured through website analytics that provide a measure of daily clicks and where they are from. In this way they are able to track the footprint created by both their online and offline promotion initiatives. Having a presence on the digital platforms has increased the exposure of their properties and has increased the number of individuals following their activities. They post their special offers on the website, Facebook, and newsletter.

Azura Retreats attend the following travel fairs annually: ITB (Berlin), WAA (South Africa), INDABA (South Africa) and Virtuoso (USA). They select these travel fairs based on the participation of hosted buyers of their product. When dealing with the travel trade online, they provide online availability of rooms at their various properties. Beyond the travel trade, they send out a monthly newsletter to a database of 5,000 people who have signed up for it on their diverse ICT platforms. They specifically target the luxury tourism market through articles in luxury lifestyle magazines and they use Public Relations agencies to promote their properties in their biggest markets of South Africa, the USA, the United Kingdom, and Germany.

### ***Challenges to Effective ICT-based Tourism Marketing***

#### *Better national internet connectivity infrastructure and ICT workforce*

These two examples of successful ICT promotion in marketing of protected areas highlights the need for a workforce familiar with both ICT and tourism marketing. In the case of Azura Retreats, their marketing department is located in South Africa where the workforce and the ICT infrastructure backbone were described as adequate. In the case of Gorongosa National Park, though constrained by the Mozambican internet service shortfalls, the communications department has support from colleagues in countries with better internet connections that support the creation and maintenance of the website in particular.

#### *Destination marketing of Mozambique*

The private sector companies interviewed all indicated that an improvement INATUR's destination marketing activities would significantly improve their ability to market the parks. Despite an attractive collection of beaches, wildlife, culture and history, the tourism industry perceives Mozambique to be relatively unknown on the global market. As a result, private sector establishments spend a great deal of resources on destination marketing, unable to focus specifically on each business or attraction's competitive demand.

### ***Lessons Learned***

Mozambique is a developing destination with a wealth of natural and cultural assets – a situation common to many OIC member countries. Because of shifting governmental responsibilities, a lack of consistency for destination marketing has severely impacted the private sector's ability to establish business and consumer relationships to drive sales.

National Tourism Authorities should identify solutions to ensure that a long-term destination marketing platforms can be established and managed during periods of turnover, especially in scenarios where online marketing expertise is not found within the organization.

### 3.7 Case Study: Oman

The following case study examines ICT-based tourism solutions in a rapidly growing tourism economy, with a special focus on the deployment of digital destination marketing initiatives in multiple markets, among tourism SMEs, and the golf tourism market.

#### ***Tourism Sector in Oman***

The Sultanate of Oman is a burgeoning tourism destination located on the southeastern tip of the Arabian Peninsula. Over the past several years, Oman has been recognized by National Geographic, Lonely Planet, Rough Guides, and other key travel media outlets as an “undiscovered” travel destination that offers a strong mixture of adventure, culture and luxury.

Oman offers a tourism counterpart to its neighbors in Dubai and Abu Dhabi with a heavy focus on cultural, natural, and adventure assets. Oman’s landscape is dynamic and diverse. The vast deserts of the Al-Wusta interior region attract adventure travelers seeking Bedouin camping experiences, four-wheel driving, and camel treks. Oases (also known as Wadis) are frequent throughout the landscape and are popular spots for picnic and swimming during desert treks. Rugged mountain systems such as Jabal Shams, Jabal Mishfat, and Jabal Misht with sharp facades and accessible caves are popular destinations for rock climbers, mountaineers, and spelunkers. The expansive coastal line with continual breeze is popular among worldclass kitesurfers as well as casual beachgoers, anglers and boaters. Lagoons and island systems are idyllic stop off points for day trips from the capital. The coastal ecosystems are one of the most diverse in the world, with common and frequent siting of dolphins, whales and turtles. The average underwater visibility of 30 meters, diversity of aquatic flora and fauna, and warm temperatures have garnered Oman significant recent recognition as a hotspot for divers and snorklers. Oman is also gaining traction as a recognized birdwatching destination with over 500 species cited, 80 of which are endemic.

Oman’s long history has created a rich cultural offering including ancient forts and busy souqs. Recent additions to the cultural scene include the international programming of the Royal Opera House and the soaring Sultan Qaboos Mosque with one of the world’s largest chandeliers and carpets. Oman also overs a diverse collection of museums that highlight the country’s cultural and natural assets – including the unique Frankincense Museum that highlights Oman’s most famous export.

Culture and nature are blended during the months of July and August when the *khareef* (monsoon) transforms the southern Dhofar region into a temperate, green respite from the otherwise hot climate of the region. The three-month long Salalah Festival marks the natural phenomenon with art shows, outdoor concerts, shopping promotions, and sporting events.

Visitation to Oman has steadily been increasing over the past ten years, with a demonstrable year on year increase from 2013 to 2014. There has been continued growth from GCC and Indian markets – driven primarily by business travelers.

**Table 10: Visitation to Oman by Key Source Markets**

Source Market	2013	2014	% Difference
GCC	772,535	849,546	9.06%
India	244,786	256,210	4.46%
UK	133,529	139,362	4.19%
Germany	55,126	59,400	7.20%
France	47,830	50,570	5.42%
Italy	26,063	31,858	18.19%
Scandinavia	20,825	19,037	-9.39%
Netherlands	16,228	17,480	7.16%
Australia	15,616	17,002	8.15%
Switzerland	13,272	14,224	6.69%
Austria	8,150	8,543	4.60%
Ireland	7,452	7,723	3.51%
Belgium	7,316	7,630	4.12%
Luxembourg	499	725	31.17%
New Zealand	128	150	14.67%

Source: Oman Ministry of Tourism

Projections for leisure tourism growth are positive, with expectations of over 384,300 visitors by 2019 (BMI 2015), driven largely by significant investment by the Omani government's significant investment in tourism infrastructure and hotel development through OMRAN, a public-private institution. The contribution of tourism to Oman's GDP is the 3<sup>rd</sup> fastest growing in the world, increasing by over 10% in 2014 (WTTC, 2015).

Large scale international destination marketing has gained more importance over the past years with the formation of the Ministry of Tourism in 2012 from the previous Department of Tourism located within the Ministry of Commerce. Private sector tourism marketing can also be characterized as being in a growth phase – led primarily by a few large hotel brands and tour operators. Small and medium enterprises are emerging into the tourism market place with support and encouragement from the national government.

Digital marketing is becoming increasingly more important for the Ministry of tourism and tourism businesses as Oman enters the broader tourism marketplace. The country's position as eco-friendly destination that is counterpoint to Dubai and Abu Dhabi is slowly taking shape online as it has through traditional media endeavors.

### **ICT Framework**

Oman is a developed nation with a high-propensity for technology usage. In a study published by Oman's Information Technology Authority (2014), 80% of households have a computer and 90% possess at least one mobile phone or smart phone. For those not owning a computer or smart phone, the number one reason provided is the high cost. The study goes on to report that Internet connectivity throughout the country remains well above international averages with approximately 80% of households having access to broadband services. Households that do not have coverage cited reasons consistent with the business survey, namely lack of coverage in their area of residence, high price of service, or lack of knowledge on how to access.

### ***Government Initiatives to Increase ICT Usage***

In 2006, Oman established the Information Technology Association (ITA) to build and enhance the country's IT infrastructure and provide leadership on e-governance implementation. Since the launch of the ITA, Oman has continually increased its ranking among internationally-recognized global surveys on competitiveness, ICT usage, and e-government.

Recognizing that infrastructure alone does not drive global competitiveness, the ITA also heads the government's efforts to improve digital literacy and create a skilled workforce. The National IT Training and Awareness Framework Initiatives (NITTA) operated by the ITA is a series of three education programs to train citizens, government employees, and job seekers in basic and advance ICT skills.

#### ***Community IT Training Project (CITT)***

The Community IT Training Project is an innovative approach to increasing sustainable learning around IT usage for Oman citizens. Free classes are offered at community knowledge centers (CKC) throughout the country at no cost. The curriculum covers basic computer usage, internet usage, and social media. The program is a progress initiative designed to expand the community's access to information, improve productivity, enhance quality of life and enrich culture and tradition by facilitating communication and interaction. Over 50,000 Omanis have been trained since the launch of the program.

CITT has also focused strongly on attracting women to the program in an effort to boost gender equality and bring women into the workforce. Eight special community knowledge centers for women have been established throughout the country.

#### ***Government IT Training and Certification (GITTC) & Specialized IT Training Program***

GITTC provides government employees with specialized skills related to the implementation of e-governance services. Microsoft has partnered with the Government of Oman to deliver workshops and consultations, including the launching of a special center of e-governance innovation. Ten sessions have been held to date around licensing, products, optimization and anti-piracy. Advanced level courses for graduates of CITT and GITTC and experienced professionals focus on training towards specialized certificates in IT management awarded by CompTIA, Cisco, Microsoft, G-Cloud, SAP and others. Over 1000 individuals received this training in 2014.

#### ***e-Industry Development Programs***

ITA also serves as a business incubator for small and medium enterprises on the forefront of innovation. Entrepreneurs are provided a working space, training, networking, and advising on business management and technical skills related to their product design. Candidates are selected based upon the promise of their ideas to fill a gap within Omani society and reinforce the country's competitiveness. One such business currently being developed is a mobile app to hail a taxi from any location – solving a difficult challenge for visitors and residents alike who can currently only contact taxi drivers through personal contacts.

These initiatives by the Omani Government demonstrate a sophisticated recognition of the importance of ICT and an investment in strengthening digital skills. As tourism's contribution

to Oman's economy grows, a digitally literate society in increasingly important to deliver world-class management and effective marketing (Mighetti and Buhalis, 2009).

### Wifi Hotspots

Considering how connectivity can enhance the visitor experience, several initiatives have been put into motion by the Government of Oman in order to increase the availability of wifi in public spaces.

The City of Muscat and telecommunications firm Ooredoo have placed pre-paid Wi-Fi hotspots throughout highly-trafficked areas including the Opera Galleria, the Muttrah Corniche, Sal Amerat Park, Al Naseem Park, Al Qurum Beach, as well as the Markuz Al Bahja and Muscat Grand Shopping Malls.

ITA has partnered with Oman Telecommuincation Company (Omantel) to place free of charge Wifi in major historical tourism centers such as the Nizwa Fort, Sohar Fort and the Luban Museum in Salalah. The ITA plans to expand to an additional 10 hospots in important tourism sites by the end of 2016. In order to receive the 2 free hours of wifi connectivity, the user must request a special access code via SMS.

### **ICT-based Tourism Platforms**

Oman's tourism marketing program is very sophisticated, on par with other GCC nations that are effectively using an integrated blend of traditional and digital platforms. In the past 3 years, the focus of Oman's tourism marketing has tilted towards an increasingly digital-driven strategy.

This new digital focus plays an important part in the Ministry's new 30 year national tourism strategy designed to articulate a vision for tourism development, job creation and marketing activities. The current marketing strategy is complemented with an annual marketing action plan that is developed by the ministry. These marketing action plans provide overall direction to each of the countries 10 international promotional offices that services over 22 countries. Key Oman markets in order of importance:

- UK
- Germany
- France
- India
- Australia
- Dubai & GCC

MoT's prevailing markets have been with high-value, low-impact travelers in line with sustainable global sustainable growth patterns.

Each annual action plan is developed in a collaborative process between the Ministry of Tourism and the international marketing offices or MBR. MBRs share with Muscat prevailing local travel trends and suggest campaigns that will stimulate each market, all of which are rolled into a larger tourism strategy. Each MBR is given leeway to adapt the national marketing strategy to its individual marketplace in terms of language and offer – allowing for a more customized approach to individual markets.

### Integrated Marketing Campaigns

Multi-channel (or integrated) marketing campaigns for Oman are often incubated within an MBR where they are piloted among the target audience. If they are successful and have the potential for broad appeal, then the content and design are made available for other markets.

A recent successful example has been the “Secrets of Oman” campaign launched by the Australian/New Zealand office. This program’s objectives were to:

- Inspire, educate and build awareness of Oman as a key destination
- Remove negative perceptions of Oman and reposition as a different Arabian destination
- Grow Oman tourism’s email database
- Increase size and engagement of online communities
- Drive traffic to the Oman tourism website
- Inspire travelers to book a trip to Oman through a partner supplier of travel agency

In addition to a strong presence in offline platforms (National Geographic Magazine, Lets Travel NZ, Holidays for Couples, NZ Outdoor Magazine, among others), the “Secrets” campaigns was effectively distributed through a number of high-profile digital channels.

Trip Advisor web banners appeared for consumers searching relevant keywords such as Middle East, Dubai, and Abu Dhabi. Additionally, the Oman destination page on TripAdvisor was populated with “Secrets” content specific content for a period of 12 months. Strategic distribution of web banners were used throughout the Google Display Ad Network

A partnership with Webjet created an incentive for consumers to discover the secrets of Oman. Banner ads throughout the website drove users to a landing page that featured a 2:30 minute YouTube video entitled the “Best Kept Secret in Arabia.” This campaign was responsible for a significant increase in Facebook community size (approximately 300%) and engagement as well as website traffic (15,336 visits).

### Cooperative Marketing Campaigns

Oman tourism offices heavily utilize cooperative marketing opportunities to extend the reach of their brand and positively position Oman in the traveler marketplace. The UK/Ireland office has been most active with these campaigns, partnering with tour operators and travel agents – specifically those that service the golf market. Cooperative campaigns include a mixture of banner displays in high-traffic areas of the website and sponsored – each containing links that drive the visitor to a specific booking site or the Oman Tourism website.

### Websites

The Ministry’s operations focus primarily on oversight of each MBR and for maintaining relationships among other government entities, Omani media, and the Omani trade. Their website ([www.omantourism.gov.om](http://www.omantourism.gov.om)) has a few sections dedicated to communication to the consumer, but is primarily designed for corporate communication and to serve primarily as a vehicle for B2B information.

Key sections include:

- Overview of Oman tourism experiences
- Facts and FAQs about the Country
- Meetings and Conventions Information and Venues
- Media Center (Press releases, image galleries, video galleries)
- News and tourism industry updates
- International activities Calendar

Each MBR designs a website that is manageable for the size of the office with content particularly targeted for each market. Basic destination content and travel industry news is produced in Muscat and delivered to each of the offices where it adapted, coupled with locally-developed content, and uploaded to each website. MBRs are given flexibility by the Ministry in their design concepts and some have incorporated many best practices specifically designed to inspire travelers and drive sales.

The France office's website has a section dedicated to answering key questions about Oman through informative and engaging videos. Topics that are covered include culture, traditions, history, heritage, annual events, and practical travel information. The office in France also retains a comprehensive micro-site ([www.omantourism-publiciations.com](http://www.omantourism-publiciations.com)) of previous online and offline media coverage of Oman, searchable by destination and travel type.

The Australia/New Zealand office has focused heavily on the planning/booking stage of the travel decision making cycle, including detailed information about accommodations, latest travel deals, and a "Find an Agent" component that allows a potential visitor to search by country, city, and suburb for a vetted operator or agent selling Oman itineraries. Each agent profile contains basic contact information and a personal description of the agents' visit to Oman and what they believe makes the destination unique.

#### Agent Training Programs

Travel agents and tour operators are important components of a holistic tourism marketing program. Many Oman Tourism MBR offices have designed and launched online educational portals for the travel trade. Modules include basic travel facts, key destinations, natural resources, and selling motivations.

To date, over 150 agents have completed the training in the UK, with a target of 3500 within the next 2 years.

#### Social Media

Each MBR maintains a suite of key social media platforms – Facebook, Twitter, and Instagram. Social media is an important component of each MBR's marketing mix as a way to proactively distribute content about the destination – including inspirational photos, destination descriptions. Social media is also a key area of cooperation between the destination marketing organization, outbound travel trade, and inbound travel trade.

In addition to joint marketing campaigns listed above with outbound operators, MBRs have partnered with inbound operators, hotels, and event managers to highlight their products and services. Special deals can be featured to each MBRs audience and in some cases may be part

of a cooperation deal that allows for free of charge rooms or flights that can further be used as incentives for consumers or the travel trade.

The Netherlands Office utilized cost-per-click (CPC) advertisements to drive users to an application on their Facebook page that features one Omani tourism resort. Users can enter a contest or claim a discount.

The most active social media community among is maintained by the GCC office with over 276,000 members, primarily located in the UAE, Oman's top market. This page has daily posts that include both consumer and trade facing content – updates on new tourism products, special deals, and inspiring images of the country. Content is primarily in English with occasional posts in both English and Arabic. Significant amount of content is curated from other news sources which is the often the most popular in terms of engagement (shares, comments and likes). A sponsored post was the most page's most popular in 2014 and featured a CNN article on luxury travel to Oman and reached 55,392 people and garnered 2,331 engagements.

According to Oman Tourism staff, Instagram is becoming the most important platform for marketing the country due to its highly visual nature. While Facebook community size can grow exponentially with the right blend of advertising and sponsored posting, Instagram followers are more dedicated and interested in the content displayed.

**Table 11: Oman Social Media Active Accounts as of May 2015**

Office	Facebook	Twitter	Instagram	Pinterest
Ministry / Head Office	TourismOman 11904	@OmanTourism 2037		
GCC / Dubai		@OmanTourismGCC 930		
Australia/NZ	DiscoverOman 30,214	@Oman_Tourism 3397	@OmanTourismAU 1320	
UK/Ireland	OmanTourismUK 3451	@Oman_Tourism_UK		OmanTourismUK 574
Germany/ Scandanavia	OmanTourismus 1535	OmanTourismus 65		OmanTourismus 42
France	OmanTourisme.France 8131			
Italy	OmanTurismo 14062	OmanTurismo 415		
Belgium/Lux				
Netherlands	SultanaatOman 11513			
India			@OmanTourismIndia 268	

Source: Other accounts not listed (Flipboard-GCC, Flickr-Ministry)

### Measures of Success

The Ministry of Tourism actively monitors each MBR's outreach and engagement activities as part of comprehensive destination marketing goals. Ultimately, the Ministry is tracking an increase in visitation from each source market, however, focus is placed on long terms trends rather than year over year growth. Targets are set at once a year during a collective strategic



planning session and MBR's report on progress quarterly as well as at the conclusion of targeted campaigns.

Traditional print and personal marketing are measured using industry standards. Key measures of success include:

- Website visitation
- Social media community size
- Level of social media engagement
- Subscribers to e-learning platforms for the travel trade
- Reach and impressions of campaigns and advertising

### ***Tourism Businesses and ICT-Based Tourism Marketing***

#### ***Tour Operators***

Oman's local tourism industry is currently in a state of growth – adjusting rapidly to the international marketplace. Diversification and specialization among Omani small and medium enterprises primarily comes from the geographic market that they serve and the language skills that are available for guides.

Based on interviews with three local SME inbound tour operators, digital marketing engagement is relatively weak though improving, particularly because most operators focus on a B2B market which is perceived as more reliant on direct sales and personal connections. Financial investment in digital marketing remains low: interviewees reported 5% - 15% of their total marketing budget appropriated for all digital marketing activities and less than 10% of their sales being generated from online resources.

The importance of maintaining an online presence to boost brand awareness was consistently recognized among all operators, however three key restraints were listed:

- Lack of know-how about digital marketing best practices – specifically strategic planning and targeting
- Concern over the cost of digital marketing
- Ability to allocate staff hours to maintaining social media

Direct sales and personal connections were cited as the most important and effective form for marketing within Oman and to outbound operators. E-mail is regularly used to maintain business contacts and respond to inquiries, though only one operators actively uses a customer relationship management system and none have integration with their website.

#### ***Hospitality Sector***

Like the tour operator segment, Oman's hotel industry is in a period of rapid growth, dominated largely by large luxury brands. Nationwide, average occupancy rates recorded a 2.7% growth in 2014. (OSTI, 2015).

Global hotels including Intercontinental Hotel Group, Marriott Hyatt and Ritz-Carlton, Radisson manage their marketing endeavors from regional offices.

The Omani government is heavily involved with the growth of the country's hotel sector through OMRAN, a government owned tourism development and investment company. Their asset portfolio contains full or part ownership hotels, resort developments, and mixed use tourism properties throughout the country. OMRAN's subsidiary, the National Omani Hospitality Company (Dhiaffa), manages the Atana Hotel Brand. Atana's two four-star hotel properties in the Musandam exclave are primarily targeting the Dubai market.

Because Atana is looking to rapidly build online traction, they have sought support from Dubai- and Canada-based marketing firms to build their digital marketing presence and ensure that their brand promise of a uniquely Omani experience is clearly communicated. For Dhiaffa, this is the company's competitive advantage and the primary focus of their marketing strategy in the future.

The company's website features a sleek, streamlined design with lush photography. Recognizing that the hotel's destination is a strong selling point for GCC target markets, landscape, activities, and cultural attractions are also featured heavily throughout in both the homepage scroller and the regularly updated blog. Social media outlets have been reengaged as of May 2015 and feature destination images and calls-to-action for deals and discounts.

### Golf Marketing

The Ministry of Tourism has identified luxury sports – including golf - as a key growth market. Golf is a popular attraction for both tourists and residents throughout the GCC – driven by predictable weather and vast ocean fronts. Golf tourism is a lucrative global market worth over \$2 billion per year, recording 3 consecutive year-over-year growth to over 1.6 million golfers (IAGTO 2013, 2014). While golf holidays are anchored by the game, the majority of golf holidaymakers often plan additional activities while visiting including cultural events, shopping, and beach/relaxation.

The Middle East and Africa are quickly becoming a leader in golf tourism with leading golf tour operators tracking 20.5% growth in sales. Abu Dhabi and Dubai lead the region with several world-class golf courses, a strong international reputation, and nearly 150,000 rounds of golf played in 2014. The Ministry of Tourism and golf clubs in Oman are trying to capitalize on this growth.

Al-Mouj Golf Resort is part of the Wave, a multi-use development currently under construction along the ocean front in Seeb. For golf experts in the country, Oman has a distinct advantage over other GCC golf destinations in that there is a “vibrant, tangible culture” that is not as apparent in Abu Dhabi or Dubai. As with other Omani tourism businesses, this is an important element of Al-Mouj's marketing. Al-Mouj heavily leverages its place on the European Challenge Tour in order to grow brand awareness among international audiences and showcase Oman as a quality destination for golf tourism and providing credential to the Al-Mouj as a champion level course.

The National Bank of Oman Classic will be featured for the second year in a row in the tour in October 2015, this year as the Grand Final. The event will be broadcast live on television to French, German, UK, Dutch and Scandinavian audiences – important tourism markets for Oman. According to Oman's golf experts, golf broadcasts are an opportunity to familiarize key travel markets with landscapes, introduce the culture and showcase the quality of golf

programming. The European Tour also features a comprehensive suite of online properties, including e-newsletters, e-magazines, online video, and an online community size of nearly 200,000. Event sponsors such as Oman Air actively use these to augment their brand through signage and digital advertising

**Figure 16: Oman Featured on European Tours Golf Website**



The screenshot shows the European Tour website with a focus on the National Bank of Oman Golf Classic. The main content area features a large image of a golfer (Azaan Al Rumayh) and a headline: "OMAN CLASSIC BUILDS ON BURGEONING REPUTATION". Below this, there are several news snippets and a "TOURNAMENT LEADERBOARD" table.

Pos	Player name	Nat	Hole	Par
1	ORRIN, Max	ENG	18	-7
2	PALMER, Jason	ENG	18	-5
T3	BARNES, Jason	ENG	18	-3
T3	TULLO, Mark	CHI	18	-3
T5	JONZON, Michael	SWE	18	-2
T5	AN, Byeong-hun	KOR	18	-2
T7	MURRAY, George	SCO	18	-1
T7	QUINTARELLI, Niccolo	ITA	18	-1
T9	DOUGHERTY, Nick	ENG	18	Par
T9	GOUVEIA, Ricardo	POR	18	Par

Outside of the annual tournament, Al-Mouj partners with hotel partners and outbound tour operators for “stay and play” packages that offer competitive pricing for hotel, golf rounds, spa treatments and dining. These packages are promoted by Al-Mouj’s parent company Dubai Golf on their website, Facebook, Twitter, monthly e-newsletters, mobile application and among GCC online media companies.

### Key Challenge

#### Need for increased private sector digital marketing capacity

Oman is a global leader in providing accessible opportunities for Omanis to develop practical digital skills. The Oman Tourism College and Gulf College of Oman offer academic programs related to tourism marketing.

However, a lack of skilled marketing personnel, specifically those with digital marketing know-how, was particularly evident in the tourism and hospitality. Digital strategy, content development, and the majority of digital marketing in both the public and private sector is handled abroad or is outsourced to international marketing firms. While this may be beneficial for destination marketing by opening up access to new markets, it limits the opportunity for potential visitors to access a diverse set of tourism suppliers. Because SMEs

have trouble finding locals with the digital marketing skillset and are unable to afford outside consultants, they are often left unable to effectively market themselves. As a result, tourism's potential to support growth at all levels of the economy is not maximized.

### ***Key Lesson Learned***

#### ***Public-Private Sector Collaboration***

The Oman Ministry of Tourism, OMRAN, and ITA all provide successful examples of how the public sector can maximize a positive environment for ICT-based tourism marketing through collaboration with the Private Sector. All OIC Member States, regardless of human or financial resources available can invest in open dialogue with the private sector to identify mutually-beneficial scenarios around online marketing.

### **3.8 Case Study: Malaysia**

The following case study examines the use of ICT-based tourism marketing solutions in Malaysia with specific focus on the Islamic Tourism Market and destination-level efforts to grow awareness through social media.

#### ***Tourism Overview***

Malaysia is one of Asia's most popular tourism destinations, boasting over 27.4 million international visitors in 2014, a 6.7% growth from the previous year.

For over ten years, the country has been showcasing itself as a rich compilation of extraordinary beaches, tropical jungles, and wildlife sanctuaries. The country's location at the crossroads of key Asian trading routes has created a diverse cultural mixture featuring Chinese, Malay, and Indian roots.

As of the first quarter of 2015, the top 10 tourist generating markets to Malaysia were Singapore, Indonesia, China, Thailand, Brunei, India, the Philippines, Japan, South Korea and Australia – emphasizing the importance of regional marketing. For these visitors, Malaysia is appealing for its exceptional retail opportunities. Approximately 8% of Malaysia's yearly arrivals in the same period are longhaul travelers – primarily the United Kingdom and the United States. (Tourism Malaysia, 2015).

Kuala Lumpur is often an international visitor's first exposure to Malaysia, where towering skyscrapers meet with rustic villages. Modern and traditional cuisine, shopping and culture all mix in an exciting array of activities. Nature enthusiasts may quickly depart the main Peninsula for one of the many national parks and nature reserves found on Borneo or one of the many other islands that comprise the country.

#### ***ICT Infrastructure***

Over the last five years the Malaysian government has made ICT development a key priority. Several key initiatives have been launched in the last 5 years in order to strengthen the country's competitiveness by increasing ICT usage in all sectors. The National Broadband Initiative (NBI) was launched in 2007 as a strategy to achieve 50% household broadband penetration by 2010 through an innovative public-private sector partnership model between the government and telecommunication firms.

A second initiative, Digital Malaysia, is a comprehensive government-led program designed to move the country towards being a "developed digital economy by 2020." The programming provides funding and expertise on a number of issues that strengthen the country's ICT infrastructure and create a vibrant ecosystem for business. The program includes the creation of an open source e-payment system for SMES, access to shared cloud enterprise services, customized online education, and the development of several new digital innovations such as wireless sensor system for the retail sector (Digital Malaysia, 2012).

As a result of these activities, Malaysia is one of the most connected large nations in southeast Asia at approximately 60.7% internet penetration of the population – an increase of 13% from 2007.

## ***ICT- based Marketing Platforms***

### ***Public Sector Outreach and Information Collaboration***

In 2011, Malaysian Prime Minister announced a sweeping initiative to encourage the government’s move to digital. In addition to building comprehensive websites this mandate required that each ministry develop a social media presence to inform and educate the public about government activities – constantly growing the community size and producing metrics to demonstrate engagement with online content.

The Ministry of Tourism and Culture has been a leader in this regard by developing a vibrant corporate presence on Facebook, Twitter, and Instagram. These image rich posts are designed to keep tourism stakeholders – both local businesses and residents – aware of the Ministry’s activities in a highly engaging and visual way in an effort to drive further public-private sector collaboration. This process has proven to be a valuable add on to the Ministry’s main website where information was mainly stored and accessed only if it was sought. By using proactive communication social media, the Ministry is able to better showcase its work and generate buy-in from its local partners.

The Ministry’s corporate communication team also reaches out to residents and non-industry stakeholders through ongoing social media campaigns. In May 2015, visitors and residents were encouraged to upload photos of themselves on Facebook, Instagram or Twitter as part of an “Awesome Selfie Contest” which received nearly 200 entries and significantly boosted engagement across all of the Ministry’s social media platforms.

### ***ICT Usage in Malaysia Destination Marketing***

Tourism Malaysia is the Ministry of Tourism and Culture’s specialized marketing agency.

Tourism Malaysia maintains a vibrant social media presence which has won several commendations from the World Bloggers and Social Media Awards Social Media Awards. One key area for Tourism Malaysia’s 2015 digital marketing strategy into grow a deeper and more consistent social media presence. Tourism Malaysia maintains two main Facebook pages from their Kuala Lumpur with a total of over 2 million followers, both geared towards domestic market, which is an important development priority for the Ministry of Tourism. The organization also retains 24 international offices, 18 of which also maintain some Facebook presence on a combination of Face native to that location, including Russian social media platform VK.com and Chinese platform Weibo (See Table 12)

**Table 12: Malaysia Tourism Social Media Community Sizes**

Platform	Target Audience	Community Size
Facebook Malaysia Truly Asia	Malaysian Market	88,116 Fans
Facebook Cuti Cuti 1 Malaysia	Malaysian Market	1,933,269 Fans
In Market Facebook pages	18 Markets Worldwide	~400,000 fans
VK.com	Russia	28,567 members
Weibo	China	246,322 participants

Source: Created by authors

Tourism Malaysia's yearlong campaign is entitled the "Year of Festivals" and highlights hundreds of events and activities occurring throughout the country. The campaign is designed to attract both international cultural enthusiasts as well as stimulate significant domestic tourism by generating awareness of the country's diverse event calendar. The destination is actively growing its social media community size with regular platform-based contests designed to attract user-generated content.

Beginning in June 2015, Tourism Malaysia will launch a social media photo contest designed to heavily utilize user generated visual content to showcase the country's extensive natural and cultural attractions. The campaign will run for almost four months. Participants can submit photos directly through a custom made microsite or through Instagram using the hashtag #beautifulmalaysia. All photos will be curated and top entries selected by Tourism Malaysia can win one of several cameras and tablets.

The event will be launched at the start of Malaysia's main shopping season in collaboration with the 1Malaysia Carnival hosted at a local shopping mall.

Tourism Malaysia also places a significant amount of resources in driving awareness of the country through online influencers and travel bloggers. Familiarization trips for online media are held every month with a specific focus on a key niche markets such as bird watching or sports tourism. Seventeen cultural tourism tastemakers were targeted for a familiarization trip held during the Penang World Music Festival where they had meetings with key tourism stakeholders, had "social media breaks" during opportune content-generation moments, and then proceeded with a tour throughout the country.

#### Halal Tourism and the Islamic Tourism Centre

"Halal tourism" is a term that has come to represent a niche marketing movements that cater towards the specific needs of a growing Muslim travel market. With 1.6 billion Muslims worldwide, many destinations, tour operators and accommodations are identifying ways in which to service the unique lifestyle requirements of practicing Muslims. Islamic products and services that are compliant with *shariah* (Islamic law) principles have become an important part of growth.

Excluding travel for the annual Hajj and Umrah pilgrimage, global Islamic spending on outbound tourism is estimated at \$140 billion, about 12 per cent of the world's tourism market (Thomson Reuters, 2013).

The Malaysian government has prioritized positioning the country as a premier destination for Muslim travelers as part of its comprehensive Halal Master Plan that has included several global Islamic events, conservation of Islamic heritage, promotion of Islamic culture and the creation of The Islamic Tourism Centre (ITC). This ITC was launched in 2009 as a private company to:

- develop strategic research and market intelligence on issues pertaining to Muslim-related travel
- support tourism development initiatives through training on issues related to Islam
- Develop standards and guidelines for Malaysia's Islamic tourism sector

The ITC maintains a strong online presence that services both consumers and the travel trade. The ITC's main website is a strong repository of facts and figures on the Islamic travel market as well as a valuable resource for Muslim visitors to Malaysia, including:

- *Musafir's* Guide with a checklist for Muslim travelers
  - Inventory of historic Malaysian mosques
  - List of Islamic museums
  - Calendar of Islamic events
  - Sample Muslim-friendly itineraries
  - Directory of Halal services
  - Listing of authentic Malaysian souvenirs and products
  - Directories of Muslim-friendly hotels and tour operators

The ITC also makes available electronic copies of its “Malaysia – The Islamic Tour Experience” travel guide with highlights of Malaysia’s top tourism attractions, cultural experiences, halal culinary hotspots, and prayer facility directories. A special addition of the e-guide was developed in collaboration with Brunei to showcase packages that spanned both countries.

**Figure 17: Brunei and Malaysia: The Islamic Tour Experience**



**BRUNEI**  
The Sultan Omar Ali Saifuddin Mosque  
ISLAMIC TOURISM CENTRE  
MINISTRY OF TOURISM, MALAYSIA

**Brunei AND Malaysia**  
THE ISLAMIC TOUR EXPERIENCE

**MALAYSIA**  
4 Days 3 Nights  
PERLIS - KEDAH  
From BND556 / MYR1390 / USD448 per pax (min 4 pax)

**A Must-See!**

**Syed Alwi Mosque (Perlis)**  
Built in 1910, features Malay and Islamic architecture.  
[www.virtualmalaysia.com](http://www.virtualmalaysia.com)

**Gua Kalam (Perlis)**  
Gua Kalam Recreational Park is popular for its enchanting 'cave walk' where you can enter from one end of the cave and come out a different end.  
[www.virtualmalaysia.com](http://www.virtualmalaysia.com)

**Padang Besar (Perlis)**  
Naturally a 'bargain-hunters' paradise, an excellent place to shop for local products.  
[www.tourism.gov.my](http://www.tourism.gov.my)

**Kota Kayang Museum (Perlis)**  
Located next to the burial ground of two 16th century Kedah's sultans. Some artefacts from the Neolithic period were discovered when excavation works was carried out for the new museum.  
<http://www.jmm.gov.my/en/museum/kota-kayang-museum>

**Kuala Perlis (Perlis)**  
Located at the estuary of Sungai Perlis, it is a good place to relax at dusk and watch spectacular sunset while enjoying variety of fresh seafood.  
[www.virtualmalaysia.com](http://www.virtualmalaysia.com)

**Al-Hussain Mosque (Perlis)**  
Famously known as the 'floating mosque'. It is a splendid sight for visitors sailing to the coastal town from legendary Langkawi Island as well as from the shore.  
<http://web.masjidal-hussain.com>

Gua Kalam, Perlis.  
Al-Hussain Mosque, Perlis.

The ITC also maintains a small but growing social media presence on Facebook and Instagram to share relevant, timely content about the Islamic tourism market. In 2014, the ITC hosted an Instagram contest designed to celebrate *Ramadan* which garnered approximately 200 participants.



The ITC supported the Department of Islamic Development (JAKIM) for the creation of a mobile application specifically designed to support Muslims in Malaysia identify the location of the nearest halal restaurant or mosque, guides for local prayer times, as well as other regularly useful resources such as scripts for *solah* and *doa* prayers and a *qibla* compass pointing in the direct of Mecca.



The poster features a background image of a mosque's interior with intricate geometric patterns. At the top center is the Instagram logo. Below it, the text reads: "#ITCRAMADAN INSTAGRAM PHOTOGRAPHY CONTEST RAMADAN 1435H 29 JUNE – 27 JULY 2014". A large white bracket encloses the text: "UPLOAD YOUR BEST RAMADAN PHOTOS AND STAND A CHANCE TO WIN EXCITING PRIZES!". Below the bracket is a yellow box with the text "terms and conditions apply". At the bottom center is the Instagram handle "@itc\_my". In the bottom left corner is the "visit MALAYSIA 2014 Truly Asia" logo. In the bottom right corner is the "ISLAMIC TOURISM CENTRE" logo with Arabic calligraphy.

#ITCRAMADAN  
**INSTAGRAM**  
PHOTOGRAPHY CONTEST  
RAMADAN 1435H  
29 JUNE – 27 JULY 2014

[ UPLOAD YOUR BEST  
RAMADAN PHOTOS AND  
STAND A CHANCE TO WIN  
EXCITING PRIZES! ]

*terms and conditions apply*

@itc\_my

visit MALAYSIA 2014 Truly Asia

ISLAMIC TOURISM CENTRE



### Tour Operators and Travel Agents

The Malaysia Association of Tours and Travel Agents (MATTA) is the country's largest tourism trade association with has over 3200 members servicing both inbound and outbound markets. MATTA's mission is to advocate for the tour operator and travel agency to the government as well as strengthen the skills and opportunities for the industry.

Those interviewed stated that the use ICT tools for tour operator and travel agency marketing is accelerating in the country as competition increases. The domination of AirAsia's "all technology" model has also been as an important driving force to bring Malaysian operators to online platforms. AirAsia – one of the region's largest air carriers – does not have traditional sales offices. All reservations must be made online. As a result, tour operators and travel agents resistant to adoption of ICT were required to do so in order to access Air Asia.

Consumer preference is also driving travel agents and tour operators to incorporate ICT tools as agent/operator loyalty is diminishing in favor of a business that can provide the quickest and cheapest booking.

Malaysian operators and agents are using a number of ICT platforms for operations and marketing. The most popular being TravFlex, a cloud-based customer relationship

management solution developed by Thai company 11Infotech. The platform allows operators and agents to seamlessly access information and make bookings for all components of the travel industry supply chain: hotel, flight, transfer, tours, sightseeing and events. This system has streamlined the process for Malaysian operators that relied very heavily on paper-driven bookings. TravFlex also offers a consumer-facing white label that can be easily integrated into the operator or agent's website.

### ***Key Challenge***

#### ***Adoption of ICT by the Private Sector***

Managing online marketing platforms has been a challenge for many MATTA agents that have previously relied on personal networks and personal communication to handle marketing. Most tour operators and travel agents in Malaysia are small or micro businesses that have relied previously on personal networks and personal communication as a way to grow business. As online marketing becomes a requirement to compete against larger agencies, many operators and agents are struggling with being able to allocate cost or time to manage platforms.

### ***Key Lesson Learned***

#### ***Market-Specific Content and Channels***

Of those destinations interviewed for this report, Malaysia has the most extensive network of marketing service providers. Each has been able to successfully position the country in a variety of markets using market-specific content distributed among appropriate key channels.

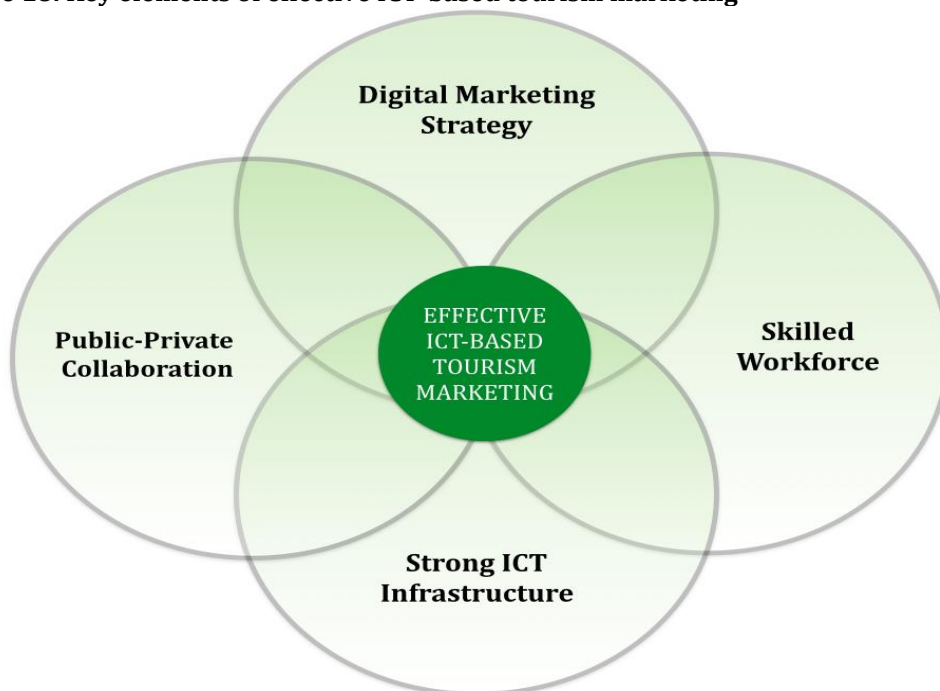
## 4 Conclusion and Policy Recommendations

This study has attempted to analyze the current situation of the OIC Member Countries in ICT-based tourism marketing and applicability of global best practice in online marketing across a very diverse set of countries where circumstances vary significantly. The private and public sector in the OIC Member States display wide disparities in application and usage of ICT within the tourism industry. Overall online marketing is most sophisticated among the public and private sector in destinations where tourism has a significant impact on the economy. In general, the results of the surveys loosely indicate that perceptions of ICT-based tourism marketing performance among the key factors was highest in the Asia, followed by the Arab group, and then Africa – though each region has multiple examples of best practice being performed among the public and private sector. This study has demonstrated that online marketing is a valuable tool for the tourism industry and there is room among all players in each OIC member country for improvement and growth.

Facilitating this improvement and growth can be challenging. Online tourism marketing is a rapidly evolving frontier. ICT tools are consistently evolving to provide more efficient and more innovative ways to serve destination marketers and tourism businesses. Prevailing trends and best practice techniques in the digital landscape have an increasingly short lifespan. Research and data more than two years old is irrelevant to the current situation.

In order to ensure the durability of this research, a focus was placed at identifying the underlying foundations to ICT-based tourism marketing for the tourism industry. While platforms may evolve and practice may radically change, the following model of four key elements as depicted in Figure 19 below will ensure an optimal environment.

**Figure 18: Key elements of effective ICT-based tourism marketing**



- A comprehensive digital marketing strategy that incorporates prevailing best practices, utilizes multiple online marketing channels, creates engaging content, and has measurable goals
- A skilled workforce able to navigate the ICT landscape and strategically apply the benefits of online marketing within the tourism industry context
- Strong ICT infrastructure to enable connectivity for the tourism industry that minimizes the digital divide of internet among ages, gender, and income levels
- Strong public and private dialogue among the tourism industry and within governmental institutions to identify key priorities to improve and enhance the ICT and online marketing environment

The following recommendations for the public sector are opportunities to improve and enhance the tourism marketing environment within OIC Member States. The tourism industry thrives when it functions as a rich collaboration between public and private sector.

#### **4.1 Build a Skilled ICT-based Tourism Marketing Workforce**

Digital literacy is a critical component in the efficient implementation of ICT-based tourism marketing solutions. All surveys, conversations, field visits and desk research point to skills and knowhow as the most consistent barrier for tourism businesses and destination marketing organizations to fully optimize their digital marketing strategy.

The Friday Institute for Educational Innovation organizes digital literacy into three main categories: (a) locating and consuming digital content; (b) creating digital content; (c) communicating digital content. Additionally, the capacity to evaluate information for reliability and problem solve using digital resources is critical (Spires and Bartlett, 2012). The implications for a digitally literate tourism workforce full capabilities of not only the day-to-day operations of digital tools and platforms but also the strategic thinking behind the messaging and methodologies that will be most effective to meet identified marketing needs.

The following are key workforce development activities to help that can be implemented by the public sector among all OIC member states to strengthen residents' online marketing skills:

- **Identify Local Skills Gaps:** Conduct regular surveys of travel and tourism industry stakeholders to assess the level and type of digital marketing expertise needed and survey sample of the local workforce to gauge level of expertise available
- **Encourage a Culture of Digital Learning:** Combat hesitancy for adoption of digital marketing program by ensuring that policymakers are well-versed in the value and importance of ICT. Make digital literacy programs available for public sector employees and create financial or other incentives for continuing education around ICT skills.
- **Introduce Primary & Secondary Digital Curriculum:** Support long-term appreciation and knowhow of ICT usage through the introduction of core computer and internet competencies to the youth populations

- Digital Marketing Courses at College and University: Ensure that there are ample skilled instructors at business and tourism programs to teach strategy and implementation of online marketing.
- Tourism Marketing Certificate Programs: Develop a practical program in partnership with local tourism businesses and educational institutions to provide intensive, hands-on experience planning and implementing digital marketing.

Tourism businesses also have a key role to play in ensuring that the digital skills gap is closed and they are able to maintain global competitiveness. Respondents to this study's survey frequently mentioned "lack of know-how" as a key barrier to increasing the volume and quality of ICT-based marketing, however "resistance to change" was also cited.

- Employee Learning Exchange: Proactively seek collaborative and mutually-beneficial partnerships with businesses in tourism and tourism-tangential industries (such as transportation) to establish opportunities to take part in each other's trainings or complete *in situ* activities for practical hands on experience.
- Digitize Job Advertising: 49% of digital marketing experts are more likely to consider a job advertised in an innovative way rather than traditional forms of recruitment (Capgemini, 2013). When seeking talent, utilize digital platforms, create contests, or look beyond the industry for inspiration.

## 4.2 Create opportunities for Tourism Sector Collaboration

The public sector has the opportunity to create a positive, creative environment for destination marketing through regular proactive collaboration with the private sector.

- Cabinet Level Working Groups: Tourism is a multi-sectoral industry with the ability to generate significant economic impact when there is strong cooperation between transportation, education, foreign affairs, immigration, telecommunication and finance – among others. Some issues pertaining to effective ICT-based marketing in the OIC member countries are telecommunications infrastructure, taxation, and education. Regular communication across ministerial and departmental borders by decision makers and policy influencers can best identify challenges or barriers to tourism growth and identify collaborative solutions.
- Public-Private Sector Working Groups: Host quarterly open dialogue amongst the tourism industry, community members, and the public sectors to drive cooperative digital strategies for destination marketing goals. Integrate conversations had from Cabinet Level Working Group
- Experience-Led Destination Level Marketing Strategies – A destination marketing strategy is a detailed roadmap of how to raise the country's global profile and drive more tourism arrivals while being efficient and effective with the resources available. All OIC member states participating in tourism marketing should have a strategy that

articulates marketing goals, responsibilities, and measures for success. The strategy is a collaborative effort undertaken by the public and the private sectors, and it holds institutions and individuals responsible for securing positive outcomes and the effective appropriation of marketing funds.

### 4.3 Improving the ICT Environment

Expanding broadband penetration is becoming one of the pressing developmental frontiers. Increased broadband connectivity promises several developmental opportunities, such as enabling better ‘smart’ cities infrastructure, driving economic growth, increasing educational and skills development, enhancing job opportunities in particular for youth; and increasing regional trade integrations. In fact, it has been estimated that a 10 percent increase in broadband services penetration can lead to 1.4 percent of GDP growth (Mohammed Bin Rashid School of Government, 2014).

ICT-based tourism marketing solutions rely on stable and reliable internet connectivity as well as affordable access to the devices that are most frequently used – smartphones and computers, among other hardware. Connectivity and technology costs very greatly among OIC member states, the later especially in terms of incomes and perceptions of value. Each member state can strive to further liberalize tax regimes and encourage investment so that both technology and connectivity are more widely available to large, medium and small tourism enterprises.

- Minimize Tax Regimes on ICT Goods and Services: Reduce or remove import tariffs for technology.
- Expand Wireless and Broadband Capabilities: Create tax incentives for telecommunication companies to invest in the expansion of broadband connectivity throughout the country. Regularly benchmark internet speeds and reliability against competitors.
- Create Social and Shared Spaces for Tech Usage: Minimize cost and create access by facilitating the development of libraries, internet cafes and community centers where internet access is cheap and technical support is available.

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## Appendix 1: 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	Kyrgyz Republic	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		



## Appendix 2: Technology Tax Regime among OIC Member Countries

Country	Computers	Mobile Devices (Phones)	Digital Cameras
Egypt	<b>Laptop/Notebook:</b> MFN Duty: 0% Sales Tax: 10% <b>PC:</b> MFN Duty: 0% Sales Tax: 10%	MFN Duty: 0% Sales Tax: 0%	MFN Duty Rate: 5% Sales Tax: 0%
Iran	<b>Laptop/Notebook:</b> MFN Duty: 10% Sales Tax: 8% <b>PC:</b> MFN Duty: 26%, subject to minimum of RIs 1000000.00 per piece Sales Tax: 8%	MFN Duty: 6% Sales Tax: 8%	MFN Duty Rate: 4% Sales Tax: 8%
Palestine			
Iraq	No duties for products going to Iraq/A reconstruction levy of 5% of the total taxable customs value of all goods imported from Iraq from all countries		
Malaysia	<b>Laptop/Notebook:</b> MFN Duty: 0% Sales Tax: 6% <b>PC:</b> MFN Duty: 0% Sales Tax: 6%	MFN Duty: 0% Sales Tax: 6%	MFN Duty Rate: 0% Sales Tax: 6%
Oman	<b>Laptop/Notebook:</b> MFN Duty: 0% No sales tax <b>PC:</b> MFN Duty: 0% No sales tax	MFN Duty: 0% No sales tax	MFN Duty Rate: 0% Sales Tax: No sales tax
Turkey	<b>Laptop/Notebook:</b> MFN Duty: 0% Sales tax: 18% <b>PC:</b> MFN Duty: 0% Sales tax: 18%	MFN Duty: 0% Sales Tax: 18% Special consumption tax (20% CIFD)	MFN Duty Rate: 0% Sales Tax: 18% Withholding tax (6% CIF)
Senegal	There is a 15-20% value added tax, a 1% statistical tax, and a 1% community levy. Levy and taxes are applied on CIF, except for VAT that is applied on CIF + duty + levy + all other taxes.		
Azerbaijan	Most products are subject to an 18% Value Added Tax (VAT), applied on CIF + Duty/Azerbaijan State Customs Committee applied on CIF value.		
Saudi Arabia	<b>Laptop/Notebook:</b> MFN Duty: 0% No sales tax <b>PC:</b> MFN Duty: 0% No sales tax	MFN Duty: 0% No sales tax	MFN Duty Rate: 0% No sales tax
Indonesia	<b>Laptop/Notebook:</b> MFN Duty: 0% Sales tax: 10% Income tax 7.5% CIFD <b>PC:</b> MFN Duty: 0% Sales tax: 10% Income tax: 7.5% CIFD	MFN Duty: 0% Sales tax: 10% Income tax (7.5% CIFD)	MFN Duty Rate: 5% Sales tax: 10% Income tax (7.5% CIFD)
Kyrgyzstan	All non-diplomatic shipments are subject to payment of 0.15% for Customs fees based on the CIF value of the shipment and USD 0.15 per kg for Customs duties on air and surface shipments		
Mozambique	There is a 17% tax applied on CIF + duty for all products. There are also a customs processing fee of \$50 U.S. and a possible excise tax, both applied on CIF		
Tunisia	All goods are subject to a fee of 3% of total duties paid in the import		

Country	Computers	Mobile Devices (Phones)	Digital Cameras
Libya	Libya applies the Common Market for Eastern and Southern Africa's Common External Tariff of 0% for capital goods and raw materials, 10% for intermediate products, and 25% for finished products.		
Uganda	<b>Laptop/Notebook:</b> MFN Duty: 0% Sales tax: 18% Withholding tax: (6% CIF) <b>PC:</b> MFN Duty: 0% Sales tax: 18% Withholding tax: (6% CIF)	MFN Duty: 0% Sales tax: 18% Withholding tax: (6% CIF)	MFN Duty Rate: 0% Sales tax: 18% Withholding tax: (6% CIF)
Nigeria	<b>Laptop/Notebook:</b> MFN Duty: 5% Sales tax: 5% <b>PC:</b> MFN Duty: 5% Sales tax: 5%	MFN Duty: 5% Sales tax: 5%	MFN Duty Rate: 5% Sales tax: 5%
Kuwait	<b>Laptop/Notebook:</b> MFN Duty: 0% No sales tax <b>PC:</b> MFN Duty: 0% No sales tax	MFN Duty: 0% No sales tax	MFN Duty Rate: 0% No sales tax
Burkina Faso	There is an 18% value added tax (VAT), a 1% statistical tax and a 1% community solidarity levy. All taxes are applied on CIF		
Cameroon	There is an 18% value added tax applied on CIF + duty		
Djibouti	Djibouti applies the Common Market for Eastern and Southern Africa's Common External Tariff for 0% for capital goods and raw materials, 10% for intermediate products, and 25% for finished products.		
Bangladesh	<b>Laptop/Notebook:</b> MFN Duty: 2% No sales tax Advanced Trade VAT (4% CIFD) AIT (Advanced Income Tax) (5% CIFD) <b>PC:</b> MFN Duty: 2% No sales tax Advanced Trade VAT (4% CIFD) AIT (Advance Income Tax) (5% CIFD)		MFN Duty Rate: 10% Sales tax: 10% Regulatory Duty (RD) (5% (CIFD + Supplementary Duty (SD))) Advance Trade VAT (4% CIFD) AIT (Advance Income Tax) (5% CIFD)
Suriname	Computer & Accessories attracts a rate of 0% Import Duty and 6% Customs Service Charge.		
Mauritania	Normal rate of 20% minimal rate of 5% applicable to countries benefiting from MFN clause and a 0% rate applied to certain products, notably those of vital need. The majority of imported products are subjected to statistical tax of 3%.		
Niger	There is a 15-20% value added tax, a 1% statistical tax, and a 1% community levy. Levy and taxes are applied on CIF, except for VAT that is applied on CIF + duty + levy + all other taxes.		
Lebanon	There is a 10% value added tax on CIF + duty		
Gambia	The Gambia imposes sales tax on goods and services, including imports. The general rate is set at 15% but the telecommunications services are set at 18%. Regarding applied MFN tariffs, capital equipment has a rate of 5%. Inputs and intermediate products have a rate of 10%. Final consumer goods and other products n.e.s. have a rate of 20%. Special goods for economic development have a rate of 35%.		

### Appendix 3: OIC Member States Internet Penetration and Connection Speed

Country	Number of Internet Users (as of 2014)	Penetration (% of Population with Internet)	Average Connection Speed
Egypt	40,311,562	48.34	2
Iran	22,200,708	28.29	2
Palestine	N/A	N/A	2.4
Iraq	2,707,928	7.79	6.6
Malaysia	675,074	2.24	3.5
Oman	2,584,316	65.82	2.9
Turkey	35,358,888	46.82	5
Senegal	3,194,190	21.96	0.8
Azerbaijan	5,737,223	60.3	5
Saudi Arabia	17,397,179	59.24	4
Indonesia	42,258,824	16.72	2
Kyrgyzstan	1,359,416	24.17	12.1
Mozambique	1,467,687	5.54	2.1
Tunisia	5,053,704	45.46	3
Libya	1,362,604	21.79	0.5
Uganda	6,523,949	16.79	4.5
Nigeria	67,101,452	37.59	4.6
Kuwait	3,022,010	86.86	3.5
Burkina Faso	741,888	4.26	1.5
Cameroon	1,486,815	6.52	0.9
Djibouti	80,378	9.07	N/A
Bangladesh	10,867,567	6.86	1
Suriname	201,963	37.13	2.7
Mauritania	455,553	11.43	2.6
Niger	298,310	1.61	N/A
Lebanon	3,336,517	67.19	1.6
Gambia	271,711	14.23	0.9
Algeria	6,669,927	16.7	1.3
Afghanistan	1,856,781	5.94	2.1
Benin	460,232	4.34	1.1
Bahrain	1,297,500	96.53	6.9
Albania	1,798,686	56.47	5.8
Comoros	49,320	6.55	N/AN/A
Bangladesh	10,867,567	6.86	1
Chad	317,197	2.4	N/A
Brunei Darussalam	277,589	65.59	5.6
Cote d'Ivoire	565,874	2.7	2.4
Gabon	168,592	9.85	3.1
Jordan	3,375,307	44.98	4.8
Kazakhstan	9,850,123	59.31	2
Guinea	205,194	1.7	N/A
Kyrgyzstan	1,359,416	24.17	12.1
Guinea-Bissau	57,764	3.31	N/A
Mali	11,862,559	75.23	2.4
Maldives	16,645	4.73	N/A
Morocco	20,207,154	60.33	1.8
Pakistan	20,073,929	10.84	1.5
Tajikistan	1,357,400	16.14	11.5
Qatar	2,191,866	96.65	9.1
Turkmenistan	424,855	8.01	N/A
Sierra Leone	92,232	1.49	N/A
Uzbekistan	11,914,665	40.63	3.8
Togo	319,822	4.57	N/A
Somalia	163,185	1.51	N/A
Guyana	295,200	36.73	N/A
Sudan	9,307,189	24.01	1.3
Syria	5,860,788	29.66	N/A
UAE	8,807,226	93.24	7.4
Yemen	4,778,488	19.14	0.9

Source: Akamai.com

## Appendix 4: Selection of Tourism Marketing Schools in OIC Member Countries

Country	Tourism School	School Website	Tourism Marketing, Digital or Digital marketing courses
Egypt	Alexandria University, Faculty of Tourism and Hotels	<a href="http://tourism.au.alexu.edu.eg/">http://tourism.au.alexu.edu.eg/</a> (Website down)	N/A
Egypt	Egyptian National Tourism Academy	(No website)	N/A
Egypt	Higher Institute for Hotel & Tourism Management	(No website)	N/A
Egypt	Helwan University	<a href="http://www.helwan.edu.eg/fth-en/">http://www.helwan.edu.eg/fth-en/</a>	N/A
Egypt	American University in Cairo	<a href="http://www.aucegypt.edu/sce/BSD/Pages/Marketing.aspx">http://www.aucegypt.edu/sce/BSD/Pages/Marketing.aspx</a>	Direct Marketing and E-Marketing
Iran	Institute of training, research & operational consultancy for tourism	<a href="http://instruct.ir/">http://instruct.ir/</a>	
Iran	MOJ Khazer Company Travel & Tourism Education	(No website)	N/A
Palestine	Institute of Hotel Management and Tourism - Master in Tourism Studies (MRTS)	<a href="http://www.bethlehem.edu/academics/hotel">http://www.bethlehem.edu/academics/hotel</a>	Strategic Management for Tourism
Iraq	N/A	N/A	N/A
Malaysia	Faculty of Hotel and Tourism Management, Universiti Teknologi MARA	<a href="http://fhtm.uitm.edu.my/">http://fhtm.uitm.edu.my/</a>	Strategic Marketing for Hospitality and Tourism, Tourism Marketing Communication Analysis and Decision, Tourism Marketing Decision Making: Case Studies, Event Marketing and Sponsorship
Malaysia	Diploma in Tourism Management at Keris College	<a href="http://www.keris.edu.my/en/hotel_tourism_management.php">http://www.keris.edu.my/en/hotel_tourism_management.php</a>	Tourism Marketing (course)
Malaysia	Diploma in Tourism Management, Bachelor of International Tourism Management	<a href="http://university.taylors.edu.my/hospitality/programmes/undergraduate-programmes/diploma-tourism-management">http://university.taylors.edu.my/hospitality/programmes/undergraduate-programmes/diploma-tourism-management</a> <a href="http://university.taylors.edu.my/hospitality/programmes/undergraduate-programmes/bachelor-international-tourism-management-hons-travel-recreation-management">http://university.taylors.edu.my/hospitality/programmes/undergraduate-programmes/bachelor-international-tourism-management-hons-travel-recreation-management</a>	Fundamentals of Marketing, Tourism Marketing, Principles of Marketing
Malaysia	School of Tourism, Hospitality and Environmental Management	<a href="http://www.sthem.uum.edu.my/">http://www.sthem.uum.edu.my/</a>	N/A
Malaysia	MDIS Malaysia, Diploma in Tourism Management	<a href="http://www.mdis.edu.my/course-detail.php?cid=13">http://www.mdis.edu.my/course-detail.php?cid=13</a>	Marketing in the Tourism Industry, E-Commerce
Malaysia	HELP University, Bachelor of Tourism Management	<a href="http://www.help.edu.my/shot/programmes/bachelor-of-tourism-management-hons.html">http://www.help.edu.my/shot/programmes/bachelor-of-tourism-management-hons.html</a>	Principles of Marketing, E-Tourism, Destination Marketing
Malaysia	UCSI University - Event & Tourism Management, Hospitality Management	<a href="http://www.ucsiuniversity.edu.my/fhtml/programmes/undergraduate/BA Tourism.aspx">http://www.ucsiuniversity.edu.my/fhtml/programmes/undergraduate/BA Tourism.aspx</a>	Hospitality and Tourism Marketing, Destination Marketing
Malaysia	Erican College - Diploma in Tourism Management	<a href="http://college.erican.edu.my/en/academic.php?catid=3&amp;pid=15">http://college.erican.edu.my/en/academic.php?catid=3&amp;pid=15</a>	Tourism Marketing (course)
Malaysia	Nilai University - Diploma in Tourism Management	<a href="http://www.nilai.edu.my/programmes/diploma-tourism-management">http://www.nilai.edu.my/programmes/diploma-tourism-management</a>	Sales and Marketing in the Hospitality Industry, Introduction to Information Technology
Malaysia	KDU University College - Diploma in International Hotel and Tourism Management	<a href="http://www.kdu.edu.my/school-of-hospitality-tourism-culinary-arts/39-diploma-in-international-hotel-and-tourism-management">http://www.kdu.edu.my/school-of-hospitality-tourism-culinary-arts/39-diploma-in-international-hotel-and-tourism-management</a>	Marketing & E-Commerce for Hospitality & Tourism
Oman	Oman Tourism College	<a href="http://www.otc.edu.om/">http://www.otc.edu.om/</a>	BSc (Hons) in Tourism Marketing
Oman	Majan College - BA (Hons) Business Administration	<a href="http://www.majancollege.edu.om/index.php/tourism-pathway">http://www.majancollege.edu.om/index.php/tourism-pathway</a>	Marketing for Tourism and Hospitality, Marketing Communications/Direct & Database Marketing, Services Marketing
Oman	Gulf College - BA (Hons) in Tourism Management	<a href="http://www.gulfcollege.edu.om/travel_management.php">http://www.gulfcollege.edu.om/travel_management.php</a>	Marketing Communications for Tourism, International Leisure and Tourism Marketing, Business to Business Marketing, International Marketing
Turkey	Bilkent University	<a href="http://www.tourism.bilkent.edu.tr/">http://www.tourism.bilkent.edu.tr/</a>	Principles of Marketing
Turkey	Bogazici University - Master's Degree in Sustainable Tourism Management	<a href="http://www.tourism.boun.edu.tr/">http://www.tourism.boun.edu.tr/</a>	Information Systems for Tourism Industry
Turkey	Adnan Menderes University - School of Tourism and Hotel Management	(No website)	N/A
Turkey	Mugla University - Faculty of Tourism	<a href="http://turizm.mu.edu.tr/en">http://turizm.mu.edu.tr/en</a>	

Turkey	Yasar University - MA in Tourism Management	<a href="http://sbe.yasar.edu.tr/en/programs/masters-degree-programs/ma-in-tourism-and-hotel-management/">http://sbe.yasar.edu.tr/en/programs/masters-degree-programs/ma-in-tourism-and-hotel-management/</a>	E-Tourism
Turkey	Erciyes University	<a href="http://turizm.erciyes.edu.tr/T%2004.pdf">http://turizm.erciyes.edu.tr/T%2004.pdf</a>	Tourism Marketing (course)
Senegal	Groupe Estel - Institut de Tourisme et des Langues. Licence Professionnelle "Langue/Tourisme/Affaires (LATA)" & Tourisme Hotellerie	<a href="http://www.groupestel.com/Tourism%20And%20Foreign%20Language%20Institute">http://www.groupestel.com/Tourism%20And%20Foreign%20Language%20Institute</a>	N/A
Azerbaijan	Azerbaijan Institute of Tourism	<a href="http://www.tourism.edu.az/">http://www.tourism.edu.az/</a>	Master's degree available in marketing
Saudi Arabia	King Abdulaziz University - Tourism Institute	<a href="http://tourism.kau.edu.sa/">http://tourism.kau.edu.sa/</a>	Sales and Marketing
Saudi Arabia	King Saud University - College of Tourism and Archaeology	<a href="http://cta.ksu.edu.sa/en">http://cta.ksu.edu.sa/en</a>	N/A
Saudi Arabia	Digital Marketing Training	<a href="http://www.dm3institute.com/">http://www.dm3institute.com/</a>	Professional Diploma in Digital Marketing
Indonesia	Genting-Star Tourism Academy	<a href="http://www.gsta-indonesia.com">http://www.gsta-indonesia.com</a>	(No marketing courses)
Indonesia	Trisakti Institute of Tourism	<a href="http://akademik.stptrisakti.ac.id/index2eng.php">http://akademik.stptrisakti.ac.id/index2eng.php</a>	N/A
Indonesia	Bali Tourism Institute	<a href="http://www.stpbali.ac.id/">http://www.stpbali.ac.id/</a>	N/A
Kyrgyzstan	Academy of Tourism	<a href="http://en.at.edu.kg/">http://en.at.edu.kg/</a>	N/A
Kyrgyzstan	Institute of Management, Business and Tourism	(No website)	N/A
Mozambique	Universidade Eduardo Mondlane	<a href="http://www.eshti.uem.mz/">http://www.eshti.uem.mz/</a>	N/A
Mozambique	ISCTEM Business School - Tourism Management	<a href="http://www.isctem.ac.mz/curso_gestaturismo.html">http://www.isctem.ac.mz/curso_gestaturismo.html</a>	N/A
Tunisia	Institut Maghrebin de Management et de Tourisme	<a href="http://www.immt.com.tn/">http://www.immt.com.tn/</a>	Marketing Hotellerie, Marketing, Marketing hotelier
Libya	N/A	N/A	N/A
Uganda	Tourism Institute of East Africa - Diploma in Travel & Tourism Management	<a href="http://www.tieaeduc.com/">http://www.tieaeduc.com/</a>	N/A
Uganda	Makerere University - Bachelor of Travel and Tourism Management	<a href="http://mak.ac.ug/prospectus/Makerere%20University%20Business%20School/Bachelor%20of%20Travel%20and%20Tourism%20Management.pdf">http://mak.ac.ug/prospectus/Makerere%20University%20Business%20School/Bachelor%20of%20Travel%20and%20Tourism%20Management.pdf</a>	Travel and Tourism Marketing
Uganda	Uganda Management Institute	<a href="http://www.umi.ac.ug/cim">http://www.umi.ac.ug/cim</a>	Digital Marketing (course)
Uganda	Cavendish University Uganda - Department of Hotel and Tourism	<a href="http://www.cavendish.ac.ug/pages/department_hotel_tourism.php">http://www.cavendish.ac.ug/pages/department_hotel_tourism.php</a>	N/A
Nigeria	National Institute for Hospitality and Tourism	<a href="http://www.nihotour.gov.ng/">http://www.nihotour.gov.ng/</a>	Tourism Marketing (course)
Kuwait	N/A	N/A	N/A
Burkina Faso	N/A	N/A	N/A
Cameroon	Ecole Nationale d'Hotellerie et de Tourisme	(No website)	N/A
Djibouti	N/A	N/A	N/A
Bangladesh	National Hotel and Tourism Training Institute	<a href="http://www.nhtti.org">http://www.nhtti.org</a>	Marketing & Sales
Bangladesh	Royal University of Dhaka - Bachelor of Hotel Management & Tourism (BHMT)	<a href="http://www.royal.edu.bd/index.php/bhmt">http://www.royal.edu.bd/index.php/bhmt</a>	Principles of Marketing, Hotel and Tourism Marketing
Suriname	Suriname College of Hospitality and Tourism - B.S. Degree in Hospitality and Tourism Management	<a href="http://www.scht.biz">http://www.scht.biz</a>	N/A
Suriname	Suriname Institute of Management Studies - B.S. in Hospitality and Tourism Management with an Emphasis on Ecotourism	<a href="http://www.simseducation.org">http://www.simseducation.org</a>	Hospitality & Tourism Marketing
Mauritania	N/A	N/A	N/A
Niger	N/A	N/A	N/A
Lebanon	Lebanese American University - School of Tourism and Hotel Management	<a href="http://sb.lau.edu.lb/institutes/iht/">http://sb.lau.edu.lb/institutes/iht/</a>	Intro to Marketing, Distribution Channels and Social Media
Lebanon	University of Balamand - School of Tourism and Hotel Management	<a href="http://www.balamand.edu.lb/Academics/Faculties/THM/Template/Pages/default.aspx">http://www.balamand.edu.lb/Academics/Faculties/THM/Template/Pages/default.aspx</a>	Hospitality Marketing
Lebanon	Notre Dame University - Degree of Bachelor of Hotel Management & Tourism	<a href="http://www.ndu.edu.lb/academics/fbae/dhmt/hmt.htm">http://www.ndu.edu.lb/academics/fbae/dhmt/hmt.htm</a>	Hospitality & Tourism Marketing
Lebanon	The Lebanese University - Tourism and Hospitality Marketing Strategy, E-Business for Tourism & Hospitality	<a href="http://www.ul.edu.lb/faculte/branches.aspx?facultyId=18">http://www.ul.edu.lb/faculte/branches.aspx?facultyId=18</a>	N/A
Lebanon	Islamic University of Lebanon - Faculty of Tourism Sciences	<a href="http://www.iul.edu.lb/faculty/?id=95">http://www.iul.edu.lb/faculty/?id=95</a>	N/A
Gambia	N/A	N/A	N/A

## Appendix 5: OIC Member States Internet Penetration and Connection Speed

Country	Penetration (% of Population with Internet)	Average Broadband Connection Speed (Mbps)
Bahrain	90	6.9
UAE	88	7.4
Qatar	85.3	9.1
Kuwait	75.46	3.5
Lebanon	70.5	1.6
Oman	66.45	2.9
Brunei Darussalam	64.5	5.6
Saudi Arabia	60.5	4
Albania	60.1	5.8
Azerbaijan	58.7	5
Morocco	56	1.8
Kazakhstan	54	2
Egypt	49.56	2
Palestine	46.6	2.4
Turkey	46.52	5
Jordan	44.2	4.8
Maldives	44.1	N/A
Tunisia	43.8	3
Malaysia	40.25	3.5
Uzbekistan	38.2	3.8
Nigeria	38.00	4.6
Suriname	37.4	2.7
Iran	31.4	2
Syria	26.2	N/A
Kyrgyzstan	23.4	12.1
Sudan	22.7	1.3
Senegal	20.9	0.8
Yemen	20.00	0.9
Algeria	16.5	1.3
Libya	16.5	0.5
Uganda	16.2	4.5
Tajikistan	16	11.5
Indonesia	15.82	2
Gambia	14	0.9
Pakistan	10.9	1.5
Turkmenistan	9.6	N/A
Djibouti	9.5	N/A
Iraq	9.2	6.6
Gabon	9.2	3.1
Bangladesh	6.5	1
Comoros	6.5	N/A
Cameroon	6.4	0.9
Mauritania	6.2	2.6
Afghanistan	5.94	2.1
Mozambique	5.4	2.1
Benin	4.9	1.1
Togo	4.5	N/A
Burkina Faso	4.4	1.5
Guinea-Bissau	3.1	N/A
Guyana	3	N/A
Cote d'Ivoire	2.6	2.4
Mali	2.3	2.4
Chad	2.3	N/A
Niger	1.7	N/A
Sierra Leone	1.7	N/A
Guinea	1.6	N/A
Somalia	1.5	N/A

Source: Akamai.com, 2014; ITU, 2014; World Bank, 2014.

## Appendix 6: Summary of Survey Responses

Region/Country	Connectivity (Scale: 1 to 4)						Total Score (1: Very Poor, 4: Very Good)	Total N
	Adequate Internet Connection Speed  (1: Extremely Inadequate, 4: Extremely Adequate)	Freedom of access to important websites  (1: Very inaccessible, 4: Very accessible)	Internet Costs & Affordability  (1: Extremely expensive, 4: Extremely affordable)	Connection Reliability (No Internet Outages) (1: Extremely unreliable, 4: Extremely reliable)	Affordability of ICT hardware  (1: Extremely expensive, 4: Extremely affordable)			
<b>Africa</b>								
Mozambique	2.00	4.00	1.00	3.33	2.00	2.47	1	
Nigeria	2.50	4.00	1.50	2.00	2.75	2.55	2	
Senegal	2.00	3.00	2.00	2.67	2.00	2.33	1	
Uganda	2.50	3.75	2.38	1.75	2.45	2.57	8	
<b>Regional Avg.</b>	<b>2.25</b>	<b>3.69</b>	<b>1.72</b>	<b>2.44</b>	<b>2.30</b>	<b>2.48</b>	<b>12</b>	
<b>Asia</b>								
Bangladesh	2.67	4.00	2.50	2.44	2.75	2.87	6	
Indonesia	3.00	4.00	2.50	3.00	2.75	3.05	2	
Malaysia	2.33	2.67	2.33	1.78	2.50	2.32	3	
<b>Regional Avg.</b>	<b>2.67</b>	<b>3.56</b>	<b>2.44</b>	<b>2.41</b>	<b>2.67</b>	<b>2.75</b>	<b>11</b>	
<b>Middle East</b>								
Egypt	3.50	3.00	2.00	2.67	2.88	2.81	2	
Iran	2.33	2.67	2.00	2.44	2.88	2.46	4	
Iraq	2.00	4.00	2.00	3.33	2.50	2.77	1	
Kuwait	3.00	4.00	2.50	1.67	2.86	2.81	2	
Lebanon	2.00	2.00	3.00	1.33	2.00	2.07	1	
Oman	3.25	3.25	2.50	2.50	2.39	2.78	8	
Palestine	2.50	4.00	3.00	3.67	2.86	3.21	2	
Tunisia	3.00	4.00	3.00	3.33	2.25	3.12	1	
Turkey	3.50	3.67	2.75	3.17	2.00	3.02	4	
<b>Regional Avg.</b>	<b>2.79</b>	<b>3.40</b>	<b>2.53</b>	<b>2.68</b>	<b>2.51</b>	<b>2.78</b>	<b>25</b>	

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