

Iraq's Tourism Sector

An Outlook on the Current Status, Challenges,
Startup Scene, and the role of ICT.

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Iraq's Tourism Sector: An Outlook on the Current Status, Challenges, Startup Scene, and the Role of ICT.

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Disclaimer: The views and opinions expressed in this report are those of the authors and do not necessarily reflect the position of KAPITA Business Hub.

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**KAPITA's Research team deeply thanks and appreciates
GIZ for being outstanding enabler for us.**

August, 2021

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Table of Contents

Abbreviations	4	Religious Tourism	30
Introduction	5	Religious Tourist Attractions	31
Historical Context	7	Tourism in Kurdistan Region	33
Outbound Tourism	8	Tourist Sites in Kurdistan Region	36
Iraqi Tourism Market	10	The Hospitality Sector	39
Relative Distribution of Tourists - Gender	13	Main Issues in the Tourism Sector	41
Relative Distribution of Tourists - Purpose	14	Initiatives in the Iraqi Tourism Sector	42
Relative Distribution of Tourists - Nationality	15	ICT Development in Tourism	44
Relative Distribution of Tourists - Residency	16	ICT Development in Tourism in Iraq	45
Relative Distribution of Tourists - Duration of Stay	17	Travel and Tourism Startups in Iraq	46
Relative Distribution of Tourists - Port	18	Travel and Tourism Startups in the MENA Region	47
Tourism Expenditures	19	Conclusion and Recommendations	48
Tourism Classification	22	References	49
Culture and Heritage Tourism	23		
Culture and Heritage Tourist Attractions	24		
Leisure and Nature Tourism	27		
Leisure and Nature Tourist Attractions	28		

Abbreviations

AD	Anno Domini, in the year of the Lord	UAE	United Arab Emirates
API	Application Programming Interface	UK	United Kingdom
BC	Before Christ	UNESCO	The United Nations Educational, Scientific, and Cultural Organization
B2B	Business-to-Business	USA	United States of America
B2C	Business-to-Customer	USD	United States Dollar
CE	Common Era	WTTC	World Travel And Tourism Council
CSO	The Central Statistical Organization		
GDP	Gross Domestic Product		
GDS	Global Distribution System		
IATA	International Air Transport Association		
ICT	Information and Communications Technology		
ISIS	The Islamic State of Iraq and Syria		
IQD	Iraqi Dinar		
km	Kilometer		
KRI	Kurdistan Region of Iraq		
m	Meter		
UNWTO	The United Nations World Tourism Organization		

Introduction

The tourism and travel sector is a very vast sector that is integrated with many different industries and other sectors such as hospitality, accommodation, transportation, food and beverages, catering, and others. This sector contributes to the strengthening of the economy, diversifying the revenue, the development of infrastructure, the flourishing of many industries, and provides employment across the entire value chain.

Globally, travel and tourism have contributed to around 10.4% of the global gross domestic product (GDP) in 2019 (UNWTO, 2019).

Furthermore, the tourism and travel sector has directly contributed to the GDP by 2,892.94 billion USD in 2019 and it is expected to reach 3,593 billion USD in 2022 despite the striking decline in 2020 that was caused by the COVID-19 pandemic and resulted in the loss of around 100.8 million jobs in the tourism industry and decreased the revenue of the industry by 42% (Statista, 2021).

Contribution of Travel and Tourism to the Global GDP in Billion USD



Source: Statista, 2019.



Introduction

Iraq is a country that has a very rich history and myriad cultures that extend back to the first known civilizations. It is the heart of many astounding historical, archaeological, and religious sites.

It also enjoys a diverse natural landscape from the mountains and waterfalls in the north to the marshes in the south.

Hence, this provides many opportunities for domestic and international tourism to thrive.

The tourism sector can contribute to the non-oil economy, diversify the means of income, create jobs, and support the private sector businesses operating in this field, in return, playing a role in the development of the economy. In 2019, this sector provided 165,033 jobs and contributed to 1.9% of employment (WTTC, 2019).

Iraq's GDP amounted to 228.4 billion USD in 2014 while the travel and tourism sector's total contribution reached 6.7%. Whereas in 2015, the GDP plunged to 166.7 billion USD and the tourism's total share comprised 8.9%. It decreased since that to 8.4% in 2019. While the direct contribution to the GDP reached 2.98% of GDP with 5.05 billion USD (WTTC, 2019).

Total Contribution of Travel and Tourism as a Share of Iraq's GDP



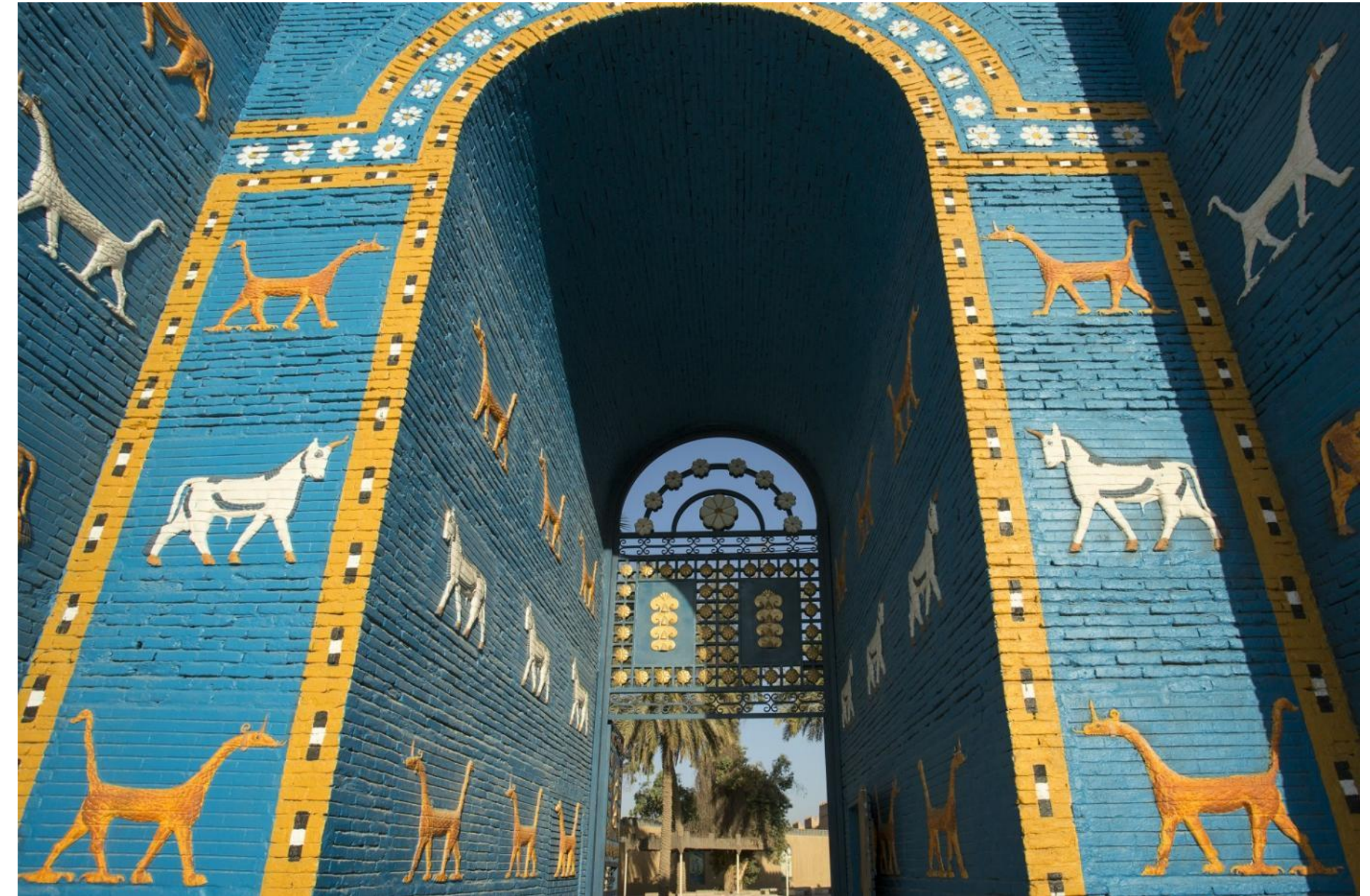
Source: World Travel and Tourism Council Data.

Historical Context

The tourist attractions in Iraq used to be under the supervision of two commissions, the Commission of Tourism that operated since 1996 and the Commission of Heritage and Antiquities that operated since 2000. However, in 2012, the Iraqi Parliament established The Ministry of Tourism and Antiquities where the previous commissions were merged under one umbrella although each has an independent deputy. In 2015, in an attempt to slim the cabinet from 33 to 22 ministries, the Ministry of Tourism and Antiquities was merged with the Ministry of Culture, Tourism, and Antiquities.

The ministry has departments over all the different governorates of Iraq that attend to the tourist and archeological sites in collaboration with the municipalities. Nevertheless, sites of religious importance fall under the supervision of different entities since the establishment of government in 2003 represented by the Sunni Endowment, Shitte Endowment, and the Endowment of Christian, Ezidan, Sabian Mandaean Religions Divan. In Kurdistan Region, the General Board of Tourism operates as a part of the Ministry of Municipalities and Tourism of Kurdistan that is independent of the Central Government which is responsible for the historical, natural, and cultural sites in the region.

In March 2021, Iraq has officially approved a visa upon arrival for 37 nations including the United States, Britain, Russia, China, countries of the European Union, South Korea, Japan, Canada, Australia, and New Zealand. This new regulation comes in a series of new policies in order to facilitate foreign investments in the country and promote tourism.



Ishtar Gate, Babylon

Source: Tom Westcott, Middle East Eye, 2019.

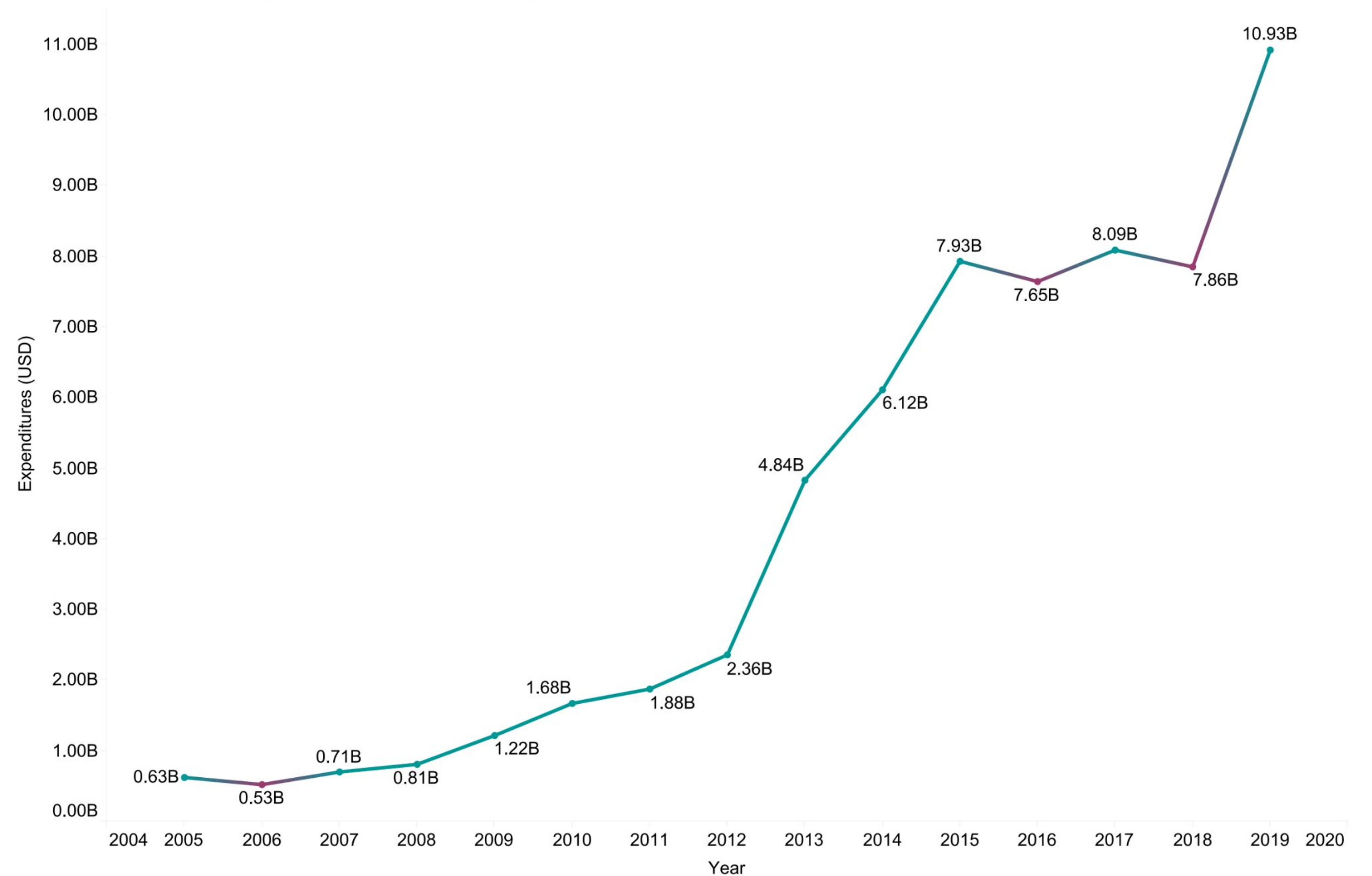
Outbound Tourism

Outbound tourism is defined by the United Nations World Travel Organization as the activities of a resident visitor outside the country of reference.

Outbound tourism expenditure for Iraq refers to the expenditures of Iraqi tourists outside Iraq, which has reached a 10.93 billion USD in 2019, contributing to 15.11% share of total imports, a growth of 39% since 2018 where expenditures amounted to 7.86 billion USD.

This exponential growth in the international tourism expenditure might suggest, in an economic theory, an increase in the disposable income, improved access to international travel, and the impact of globalization. However, in a social theory it might reflect the lack of freedom, insecurity, political unrest of the country of reference (Mehran & Olya, 2017).

Iraq: Outbound International Tourism Expenditures

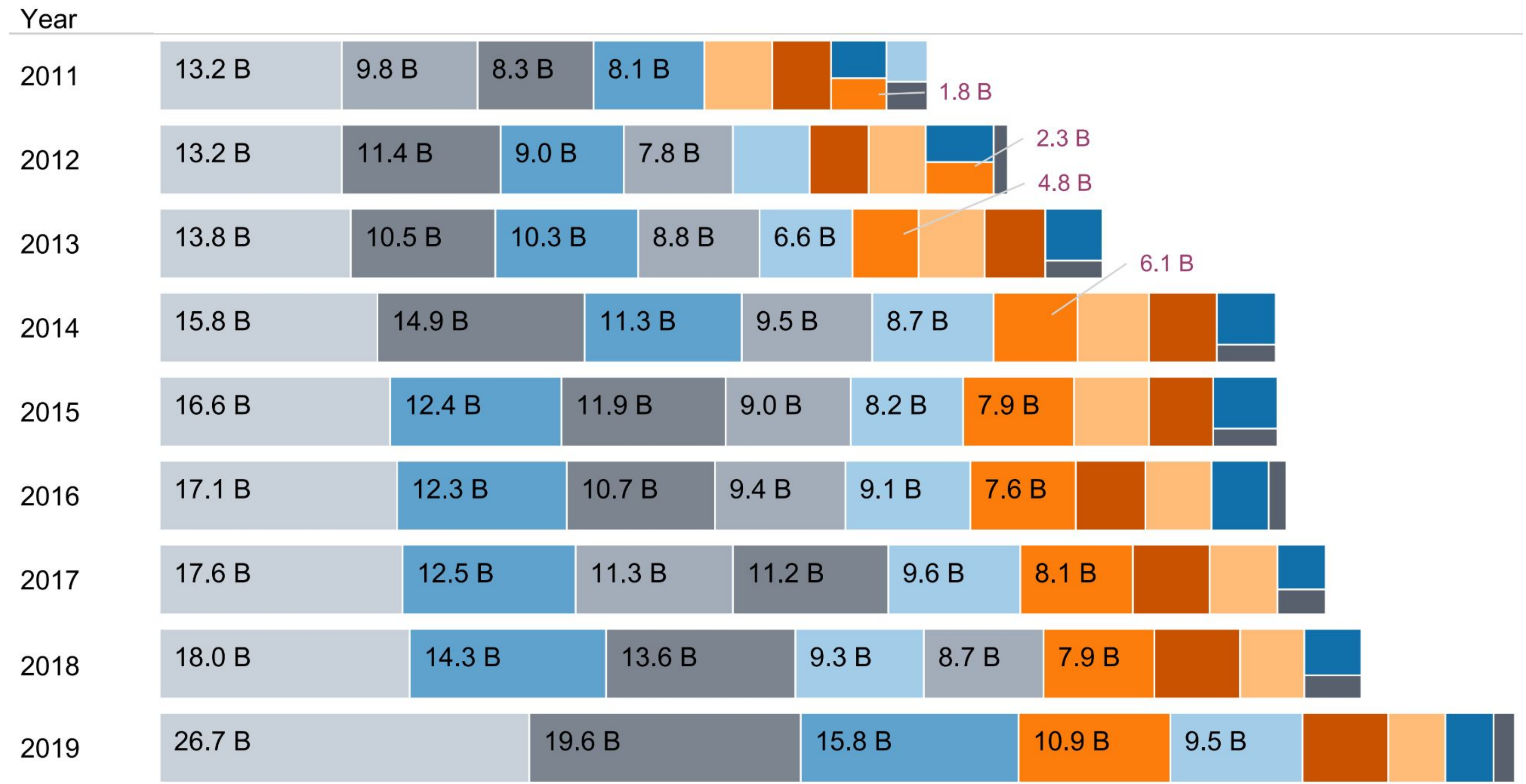


Source: World Bank Data 2019.

Outbound Tourism

The outbound tourism expenditure is defined by the UNWTO as the tourism expenditure of a resident visitor outside the economy of reference. MENA outbound tourism expenditure amounted to 97.9 billion USD in 2019 (UNWTO, 2019). UAE outbound tourism expenditure ranked the highest among other Middle East countries with 26.7 billion USD, an increase of 48% since 2018. While for Kuwait and Qatar it amounted to 15.8 and 9.5 billion USD respectively. On the other hand, Egypt's outbound tourism expenditure reached only 3.5 billion USD, and Lebanon's reached 6.3 billion USD.

Middle East: Outbound International Tourism Expenditure in Billion USD



Source: United Nations World Tourism Organization, 2019

Iraqi Tourism Market

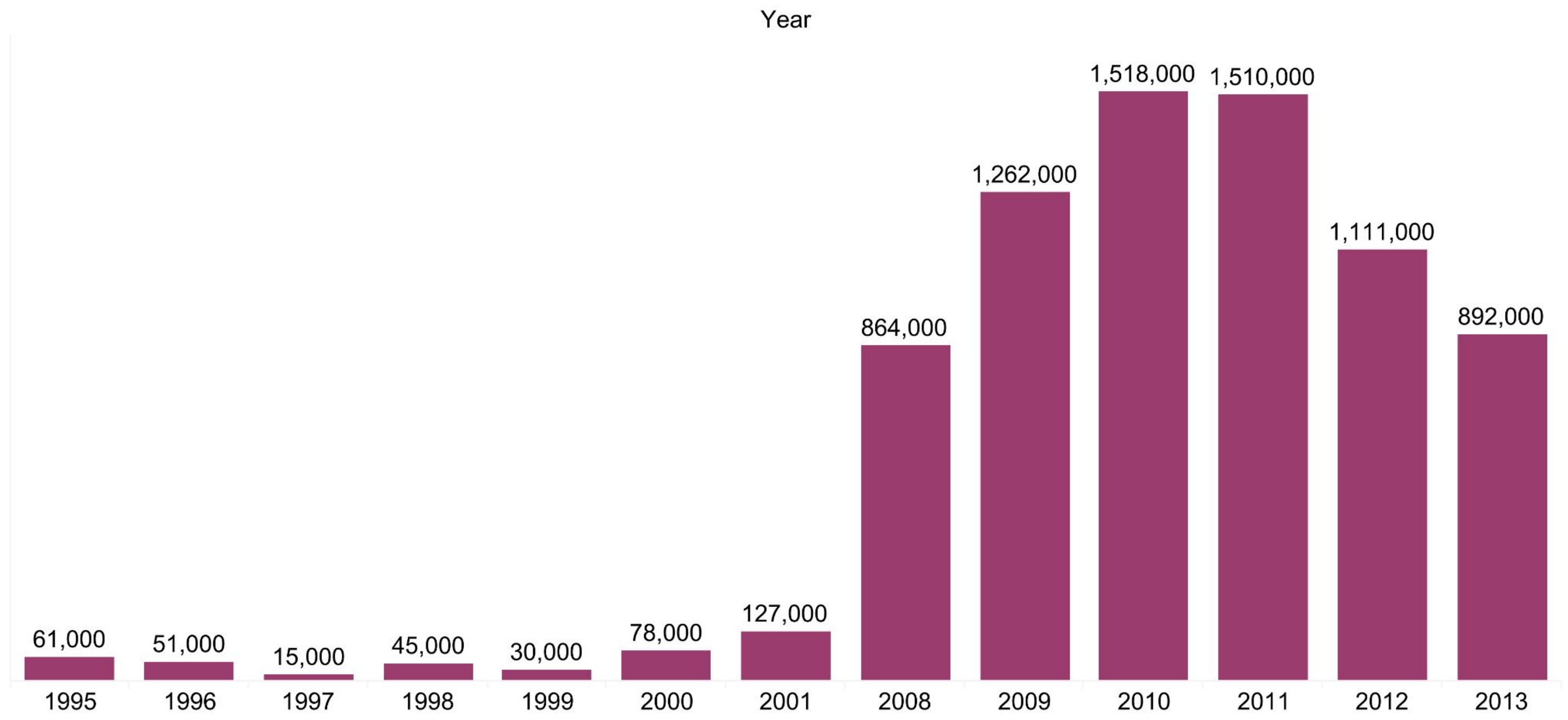
The tourism sector in the Middle East has been rapidly witnessing increasing development, especially in oil-based economies as they are looking to diversify their means of income. Saudi Arabia welcomed around 21 million international arrivals in 2018 following its tourism initiatives, visa facilitation, development in the transportation infrastructure, and organized festivals.

Whereas the total number of international tourists who arrived in the Middle East amounted to 87 million tourists, reflecting a growth of 10% since 2017, equating to 6% of the world's total arrivals (UNWTO, 2019).

The travel and tourism sector in Iraq has a great growth potential to attract international tourists. Iraq can follow in the footsteps of similar economies in the region that successfully were able to emerge as tourist destinations. However, the political upheaval, ongoing insecurity, neglect of this sector, and lack of facilities are all issues that need to be tackled.

International tourist arrivals were very limited in the 90s and it picked up in 2001 where it reached 127,000 arrivals. However, no data is available to measure the increase in arrivals for the period from 2002 until 2007. In 2008, the international arrival of tourists was 864,000 and reached its highest value of 1.5 million tourists in 2010 but started decreasing ever since to reach 892,000 tourists in 2013.

Iraq: International Tourism, Number of Arrivals



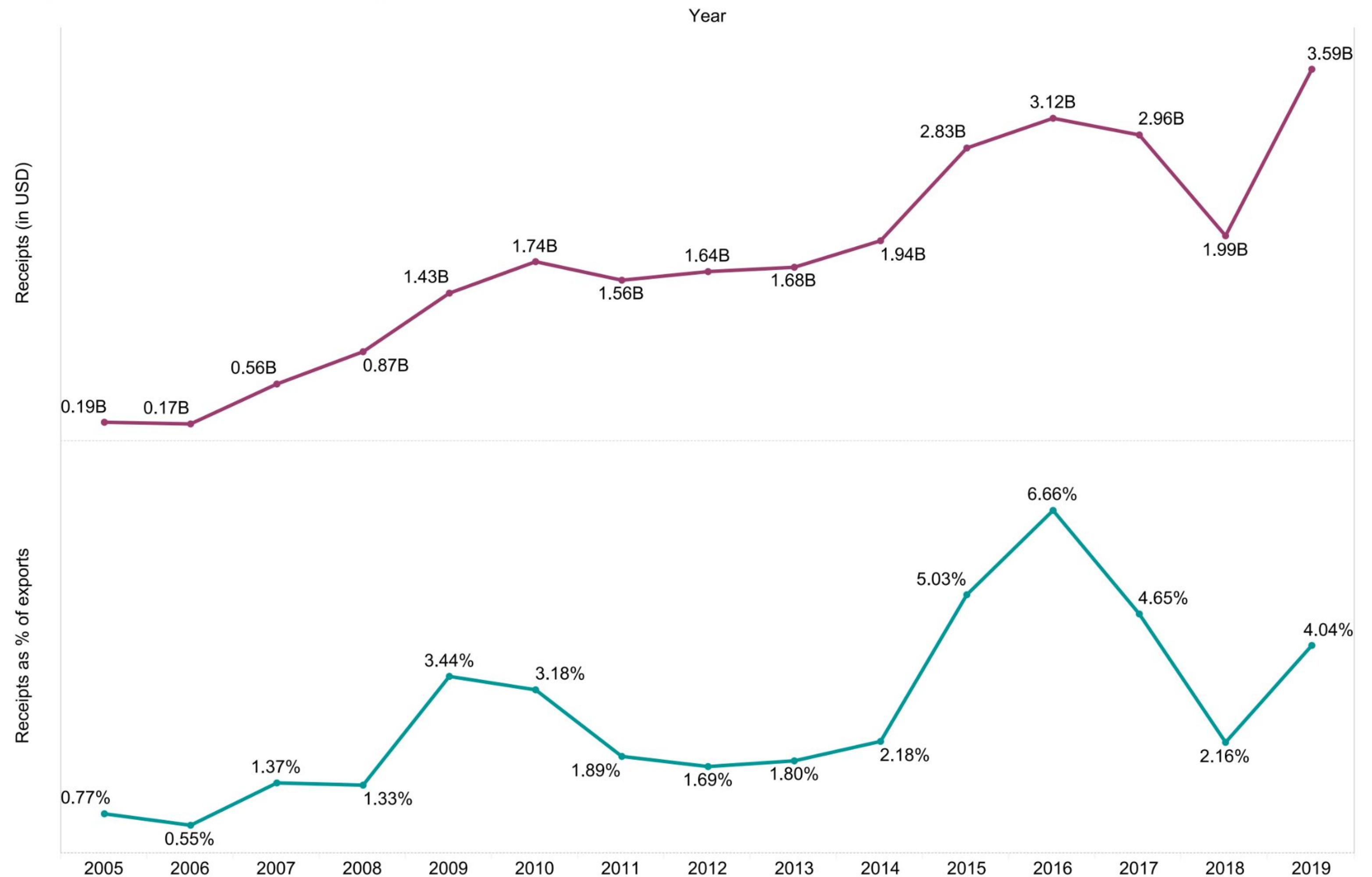
Source: World Bank Data, 2013.

Iraqi Tourism Market

International tourism receipts refer to expenditures by inbound international tourists in the country of destination. These payments include goods and services in the destination country, and also national and international carrier fares.

International tourism receipts in Iraq have experienced a steady increase from 2006 until 2010 where they amounted to 1.74 billion USD. Then the receipts have undergone a decrease of 10.3% in 2011 to rise again and reach 3.12 billion USD in 2016 which marks 6.6% of exports, a record high. International tourism receipts sharply decreased since 2016 to hit 1.98 billion USD in 2018 but it recovered to score their highest record in 2019 with 3.59 billion USD, however, they contributed to a share of 4.04% only of exports that year.

Iraq: International Tourism Receipts



Source: World Bank Data, 2019.



Iraqi Tourism Market

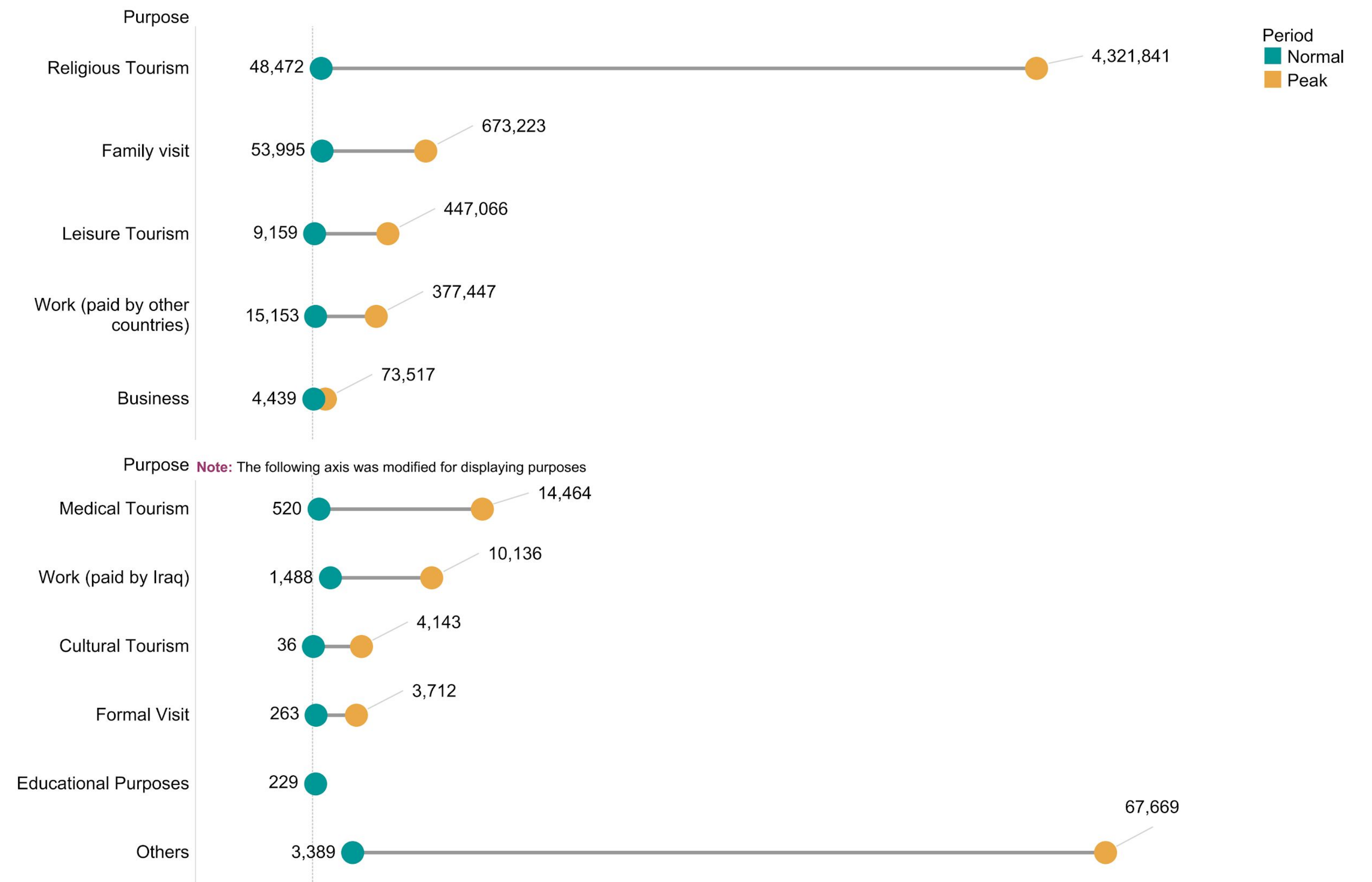
The Central Statistical Organization approaches statistics of the tourism sector by identifying two main periods, the normal period and the peak period. The peak period refers to the tourism that takes place during the time of Arba'een pilgrimage in the 20th of Safar, the second month of the Hijri calendar.

Throughout this report, we will follow this segmentation in reporting the tourism sector data.

Iraq has witnessed the arrival of a total of 137,143 tourists in 2019 during the normal times, while the number of tourists reached 5,993,217 during the peak period (CSO, 2019).

During the normal period, the majority of tourists estimated at 53,995 people, amount to 39.4% of the total tourists were there for a family visit, while 35.5% of them were there for religious tourism. Only a minority of 6.7% visited Iraq for leisure tourism. Whereas in the peak period, a staggering 4.32 million people equivalent to 72.1% of tourists were there for religious tourism and only a small share of 7.5% of them visited Iraq for leisure tourism.

Relative Distribution of Tourists According to Trip Purposes in Different Seasons (Count)



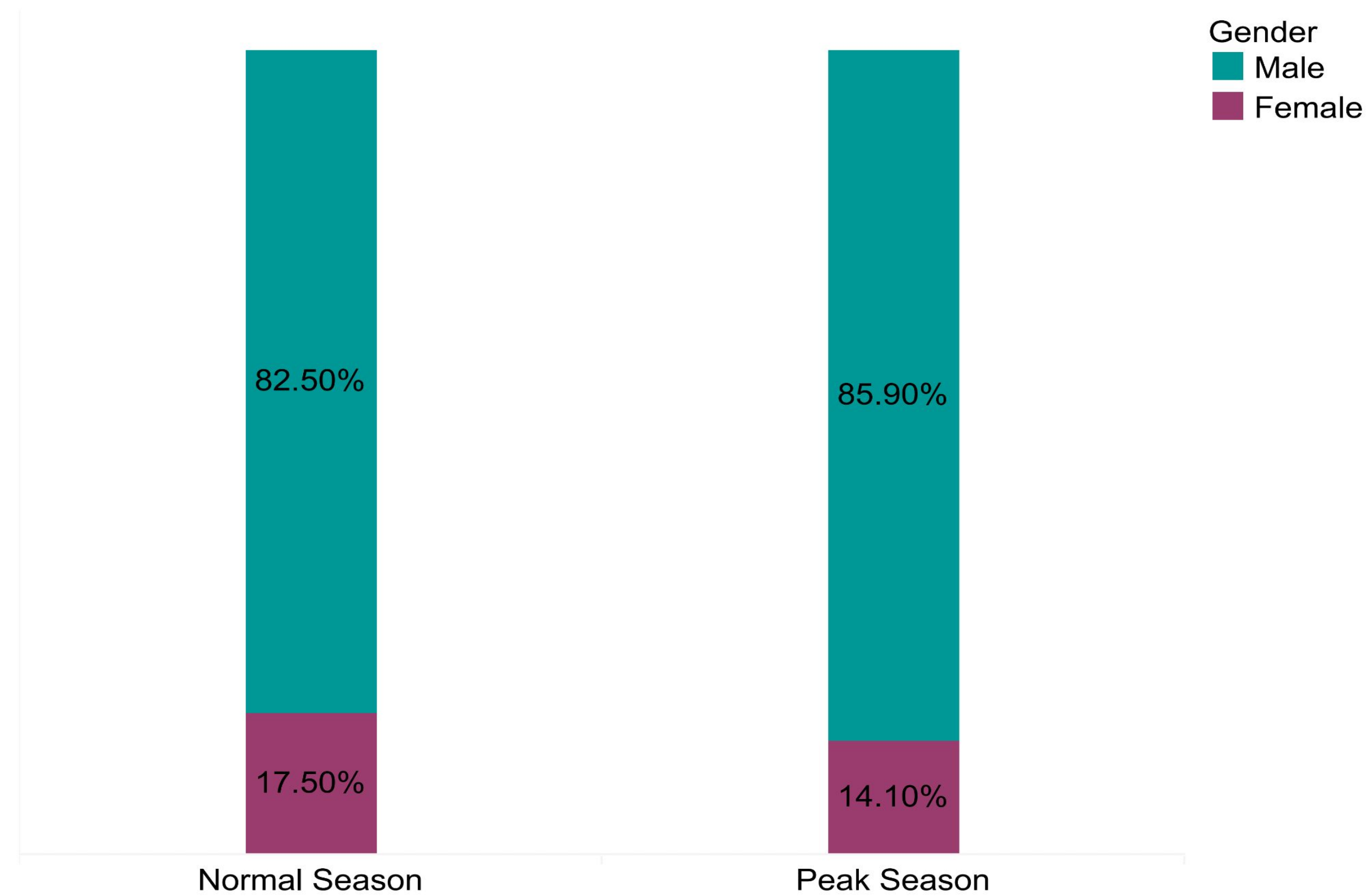
Source: COSIT, Tourism Expenditure Survey, 2019

Relative Distribution of Tourists - Gender

During the normal season, men comprised the majority of tourists with 113,084. Which contributed to 82.5% of total tourists during that duration. Whereas women were only 24,060 which constituted 17.5% of tourists.

On the other hand, men accounted for 5.14 million tourists which represent 85.9% of total tourists during the peak season. While women were 845.5 thousand tourists, composing only 14.1% of total tourists during that period.

Relative Distribution of Tourists by Gender



Source: COSIT, Tourism Expenditure Survey, 2019.



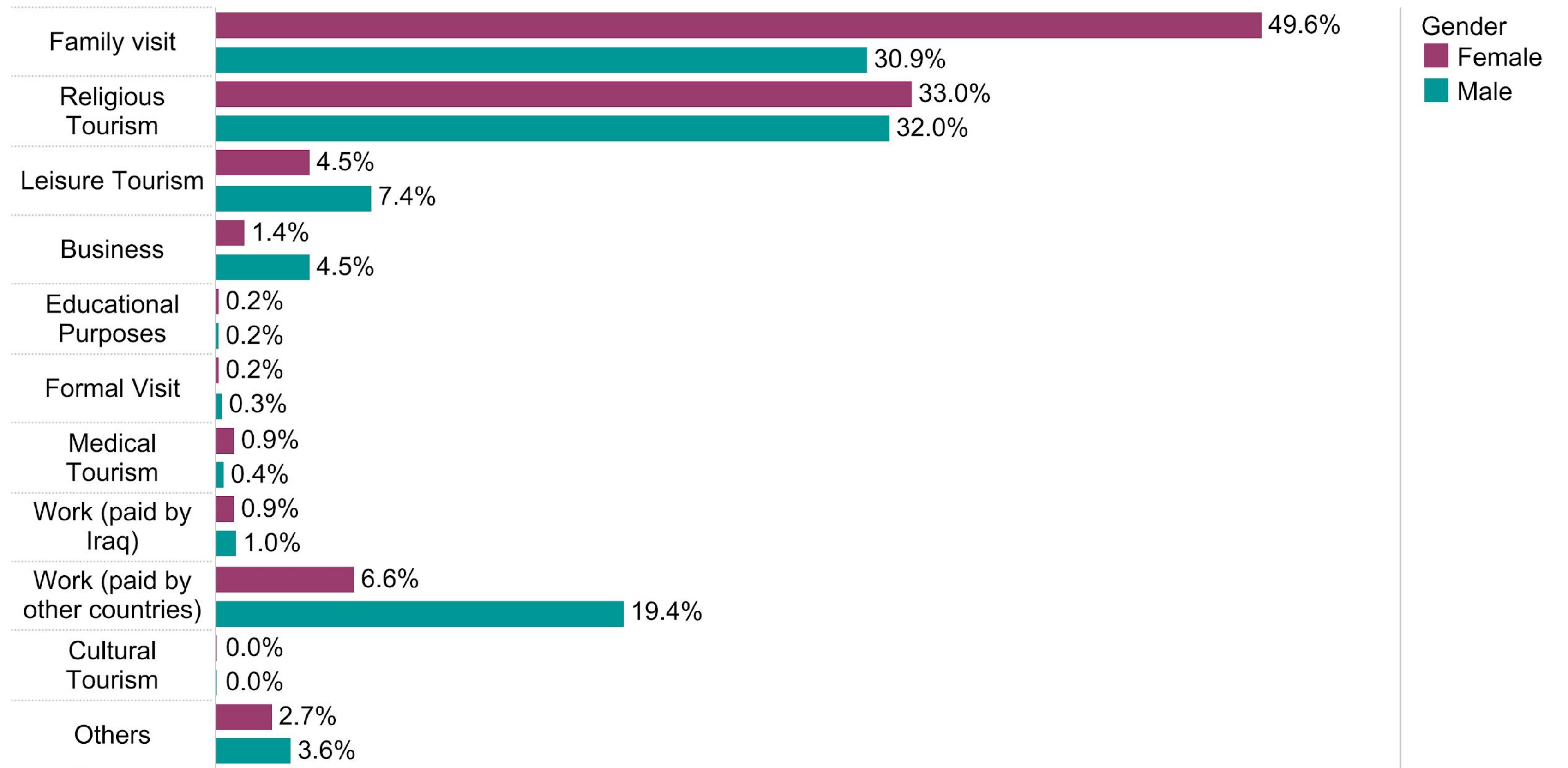
Relative Distribution of Tourists - Purpose

During the normal duration, it appears that almost 50% of women tourists have been to Iraq for a family visit compared to only 30% of men.

Furthermore, religious tourism seems to be the most attractive type of tourism even during the normal period, as it was the purpose of almost third of the tourists regardless of the gender. Whereas leisure tourism was the main purpose of the trip for only 4.5% of women and 7.4% of men.

Moreover, work is the third main purpose of the visit, as 19.4% of men and 6.6% of women seem to visit Iraq for work while being paid by other countries.

Relative Distribution of Tourists by Purpose



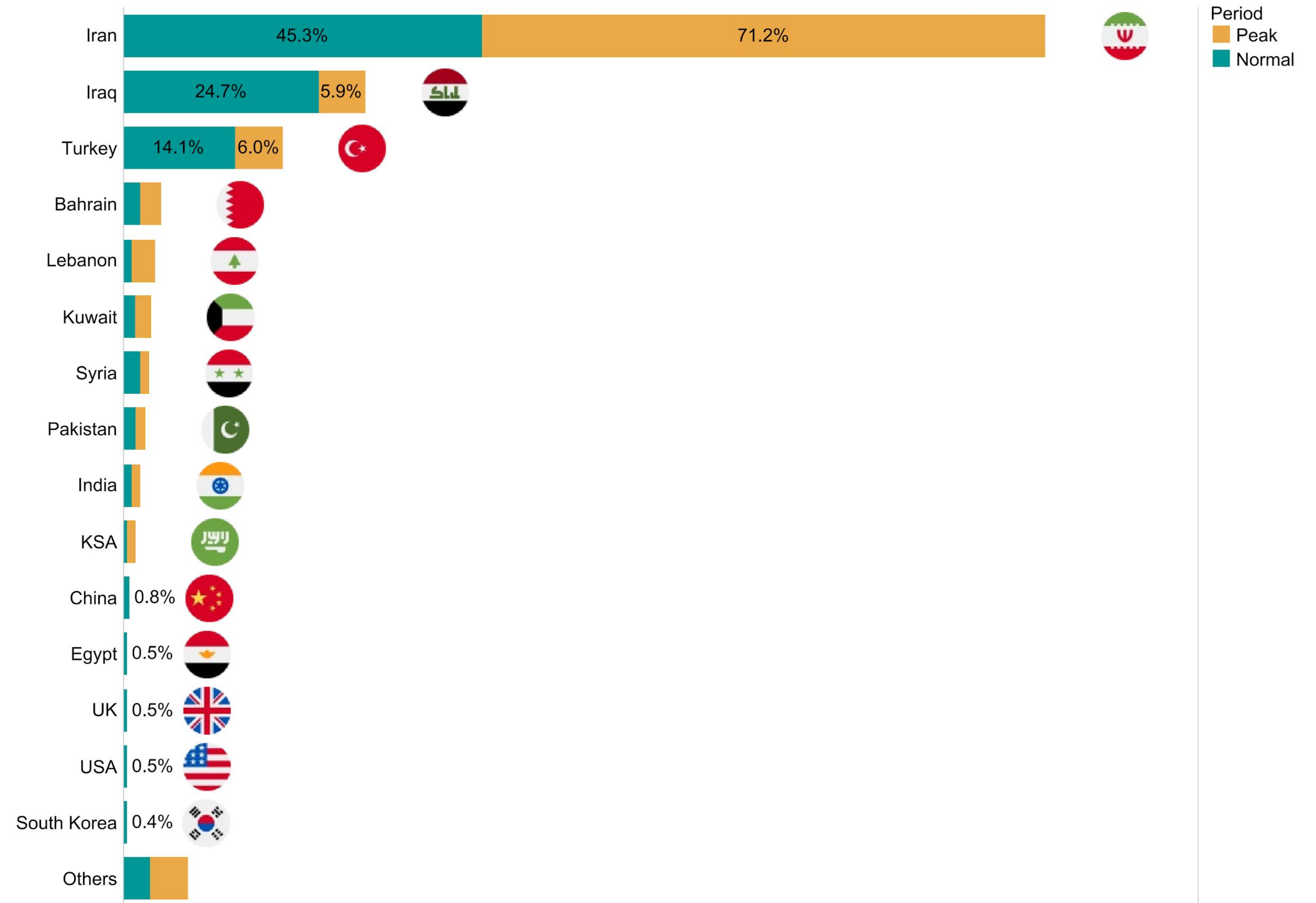
Source: COSIT, Tourism Expenditure Survey, 2019

Relative Distribution of Tourists - Nationality

Tourists from Iran constitute around 45% of the total tourists during normal times and 71.2% during peak times. Tourists of Iraqi nationality comprise almost a quarter of tourists during the normal period, but just almost 6% of tourists during the peak period.

Whereas, Turkish tourists contribute to 14.1% and 6% of the total tourists during normal and peak periods, respectively. On the other hand, tourists from the Kingdom of Bahrain and Syria comprise only 2.2% and 2.1% sequentially during the normal season. While tourists from other nationalities fall below 2% of the total tourists.

Relative Distribution of Tourists by Nationality

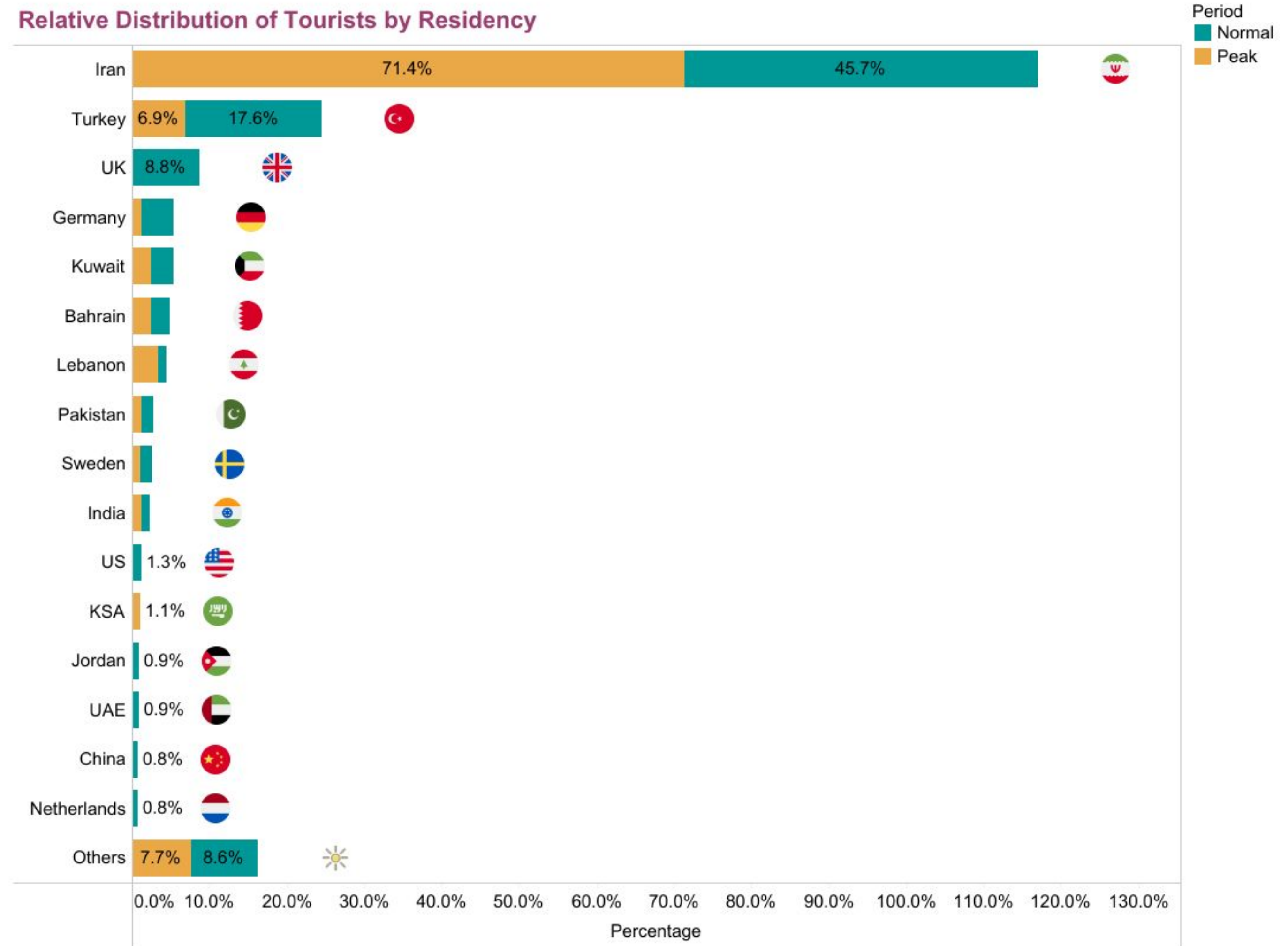


Source: COSIT, Tourism Expenditure Survey, 2019



Relative Distribution of Tourists - Residency

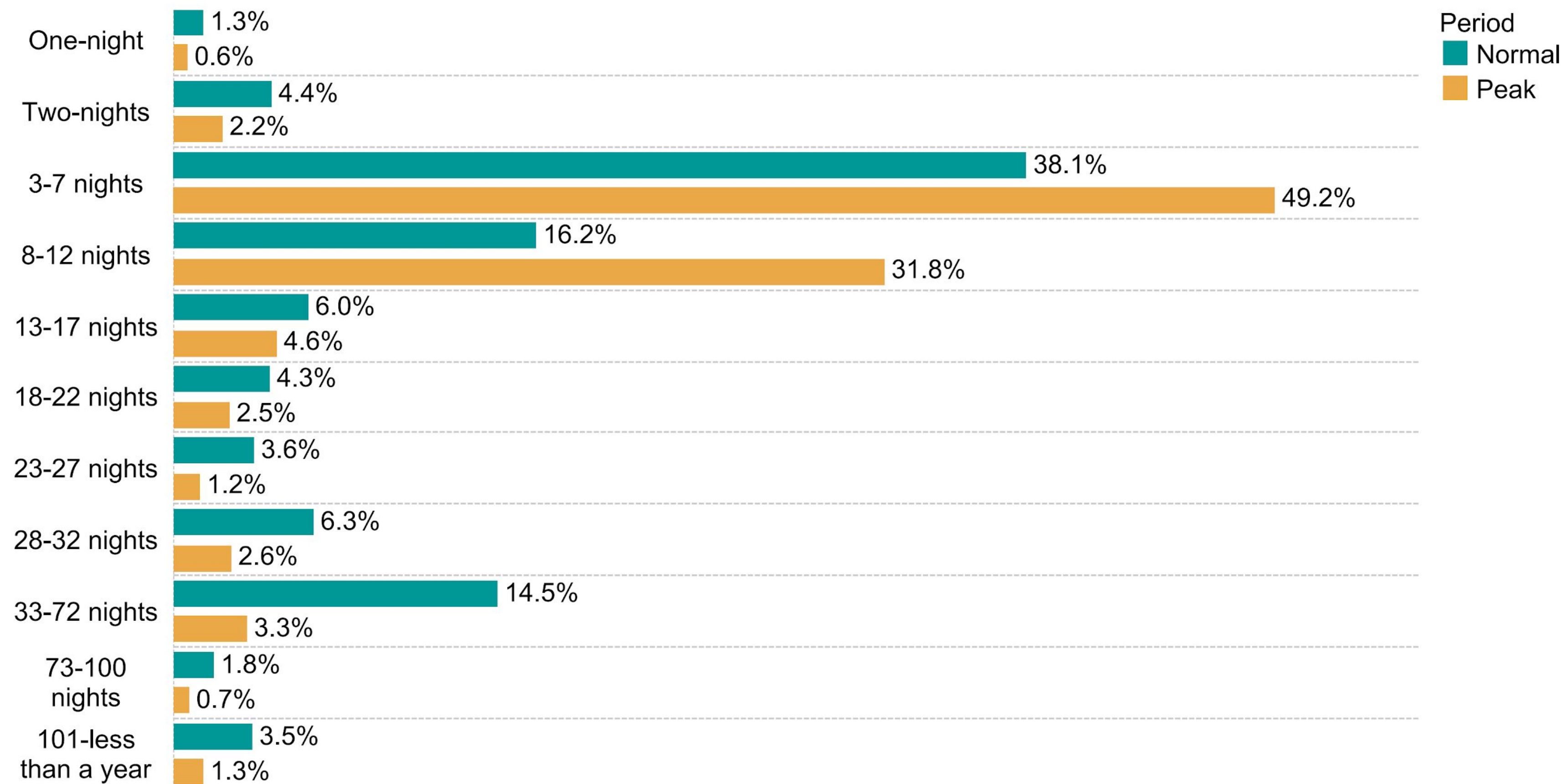
When analyzing the relative distribution of tourists according to the country of residence, Iran stays as the main country of international tourism in Iraq during the normal and peak times. Furthermore, tourists from the UK comprise 8.8% of tourists, followed by 4.4% from Germany. When comparing this relative distribution to that of tourists' nationality, we can deduce that the majority of international tourists arrivals are that of Iraqis who reside abroad. This conclusion aligns with previous findings where the family visit was the purpose of around 39% of trips during the normal duration of tourism.



Relative Distribution of Tourists - Duration of Stay

Almost half of the total tourists during peak times stay for a duration of 3-7 nights, compared to 38% of tourists in normal times. While around 31.8% of tourists stay for 8-12 nights duration in peak times compared to only 16.2% in normal times. While in normal times, around 14.5% of tourists stay for 33-72 nights.

Relative Distribution of Tourists According to the Duration of Stay



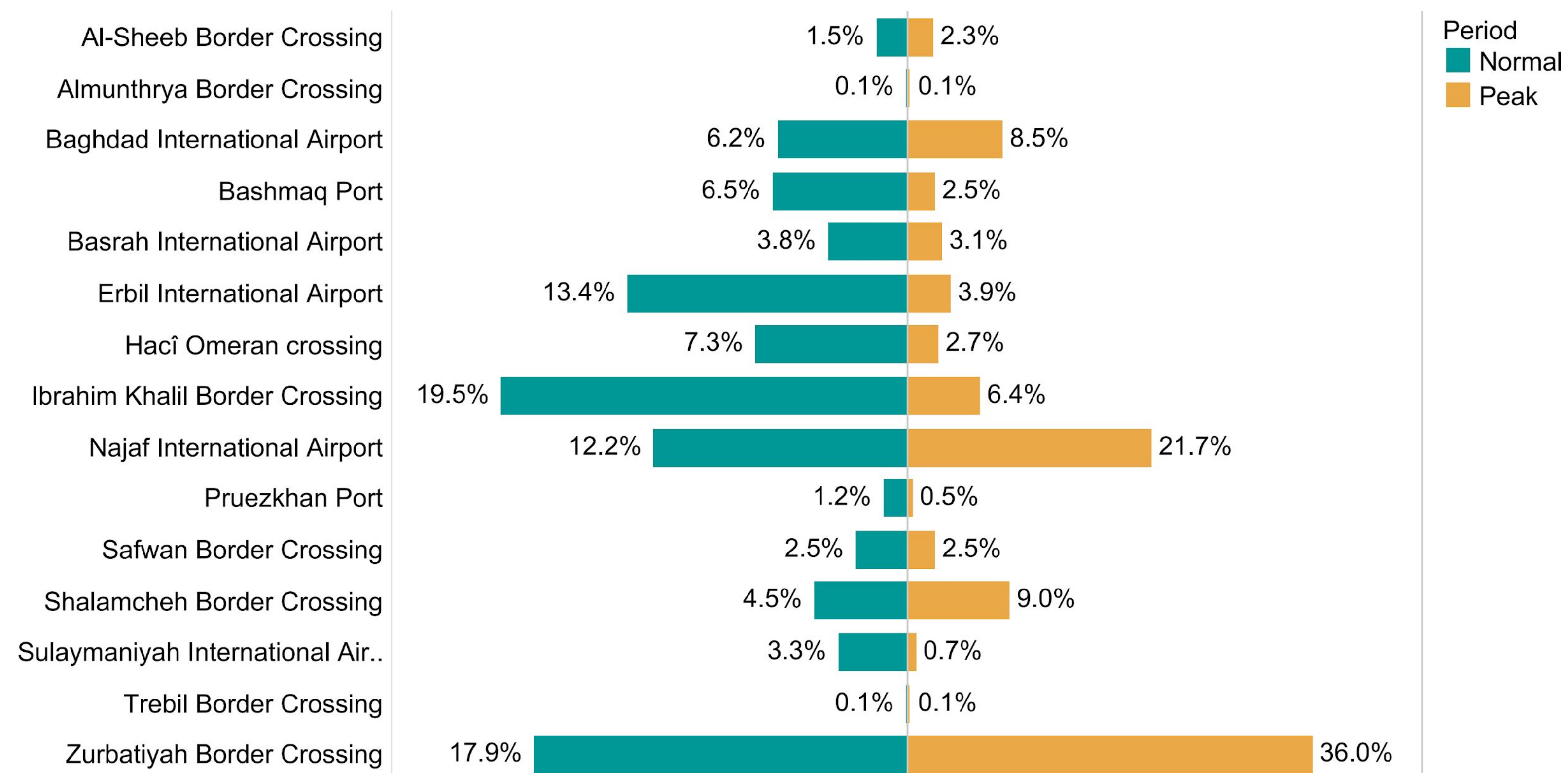
Source: COSIT, Tourism Expenditure Survey, 2019



Relative Distribution of Tourists - Port

Zurbatiyah border crossing is the most common entry point during peak times, due to the fact that it is located between Iraq and Iran, and around 70% of tourists arrivals are from Iran during the peak. It is followed by Najaf airport with 21.7%. As for the normal season, Ibrahim Khalil border crossing is the major point of entry for around 19.5% of tourists followed by Zurbatiyah port by 17.9%. Interestingly, Baghdad International Airport receives only 6.8% of visitors compared to 13.4% in Erbil International Airport, and 12.2% in Najaf International Airport during the normal season.

Relative Distribution of Tourists According to the Port

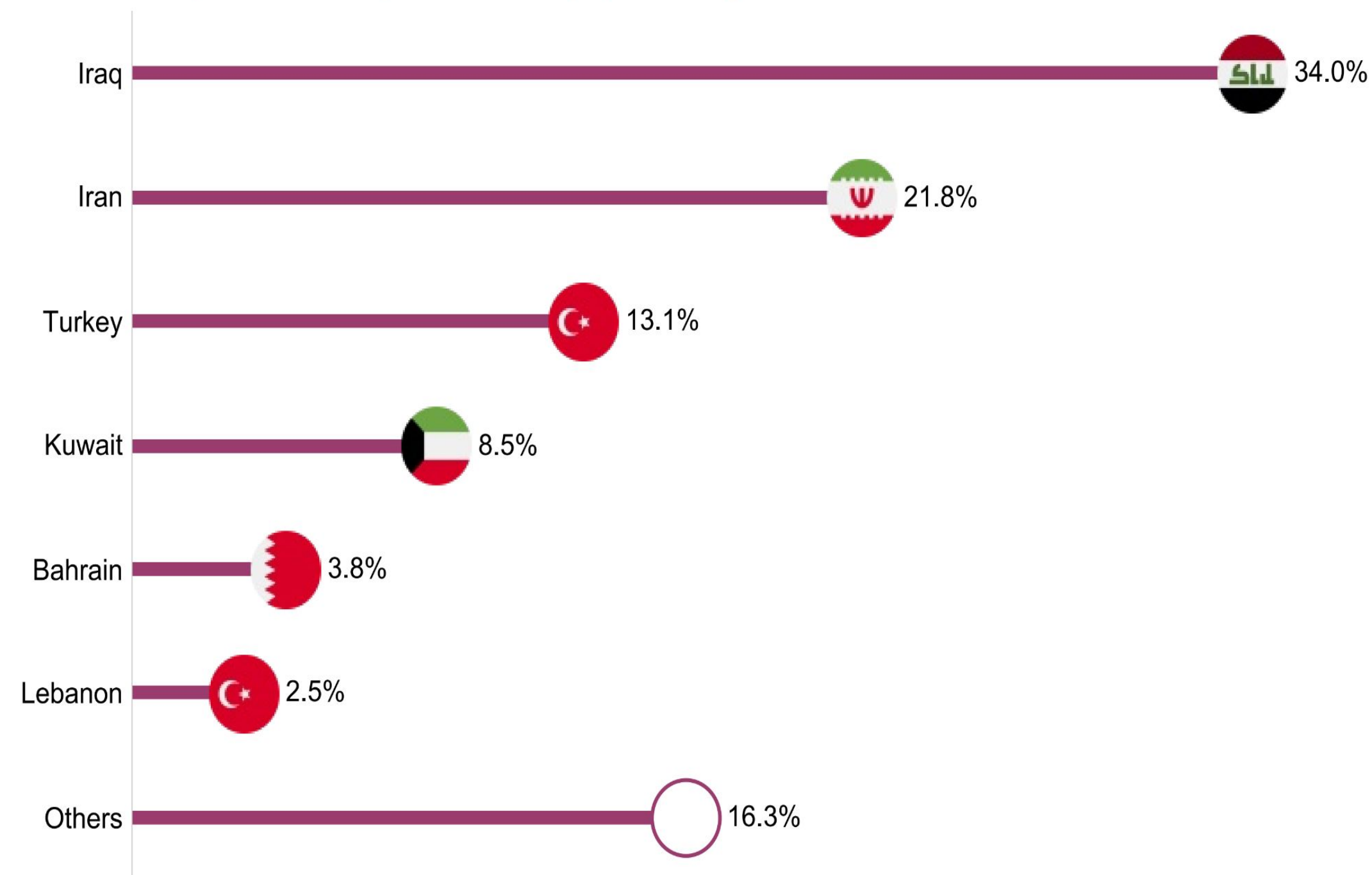


Source: COSIT, Tourism Expenditure Survey, 2019

Tourism Expenditures

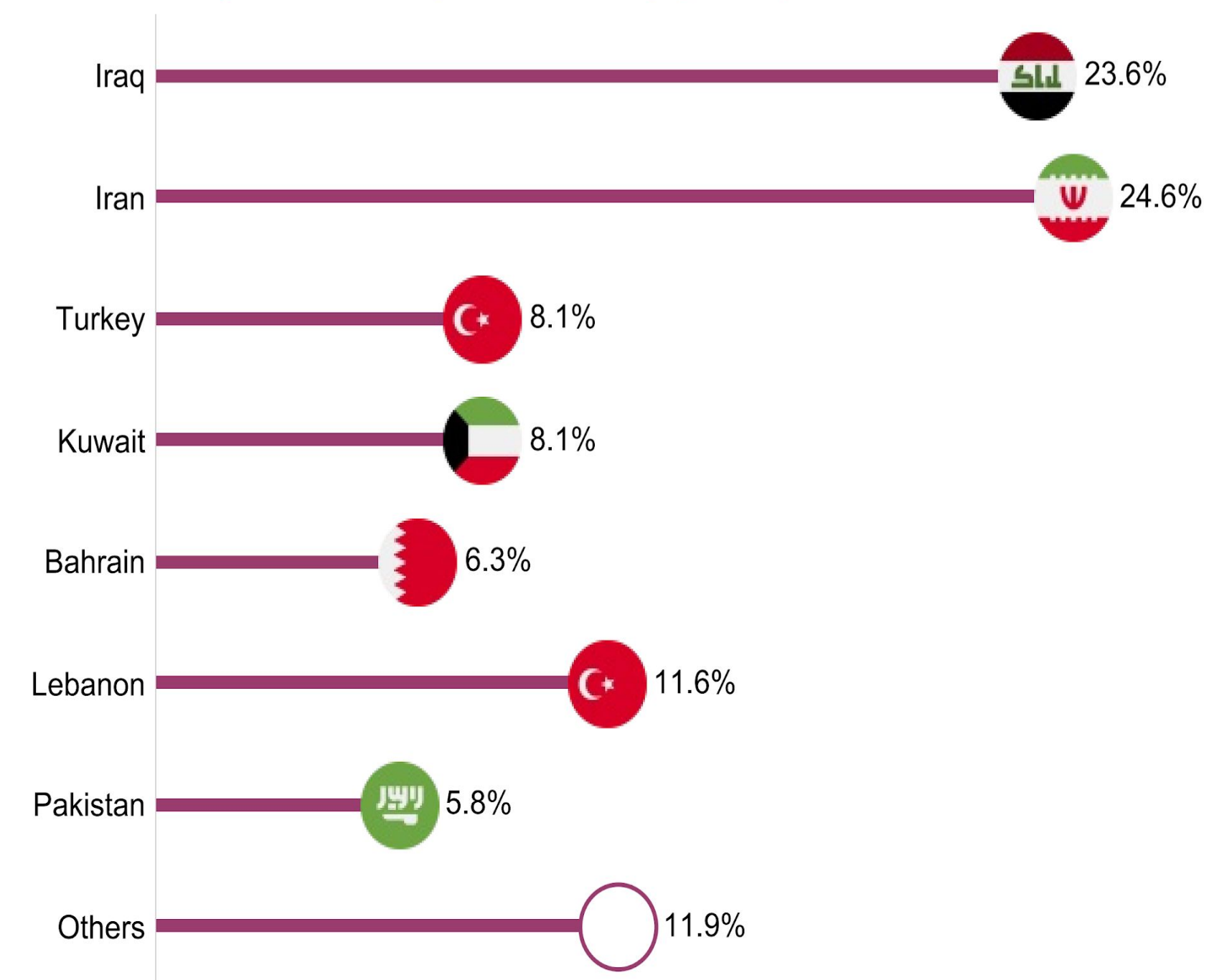
In Iraq, tourism expenditure reached a total of 5.28 billion IQD during the normal period and 162.67 billion IQD during the peak times. In normal times, Iraqis contribute to the highest share of tourism expenditures compared to other nationalities which is reflected as 34% of tourism expenditures, followed by Iranians with almost 22% and Turkish tourists with 13.1%. Whereas during the peak, Iranians contribute to the highest share of expenditures with 24.6% almost tying with Iraqis at 23.6%. International tourism arrivals seem to constitute mostly of tourists from the Middle East and neighboring countries.

Tourism Expenditure by Nationality (Normal)



Source: COSIT, Tourism Expenditure Survey, 2019

Tourism Expenditure by Nationality (Peak)



Source: COSIT, Tourism Expenditure Survey, 2019

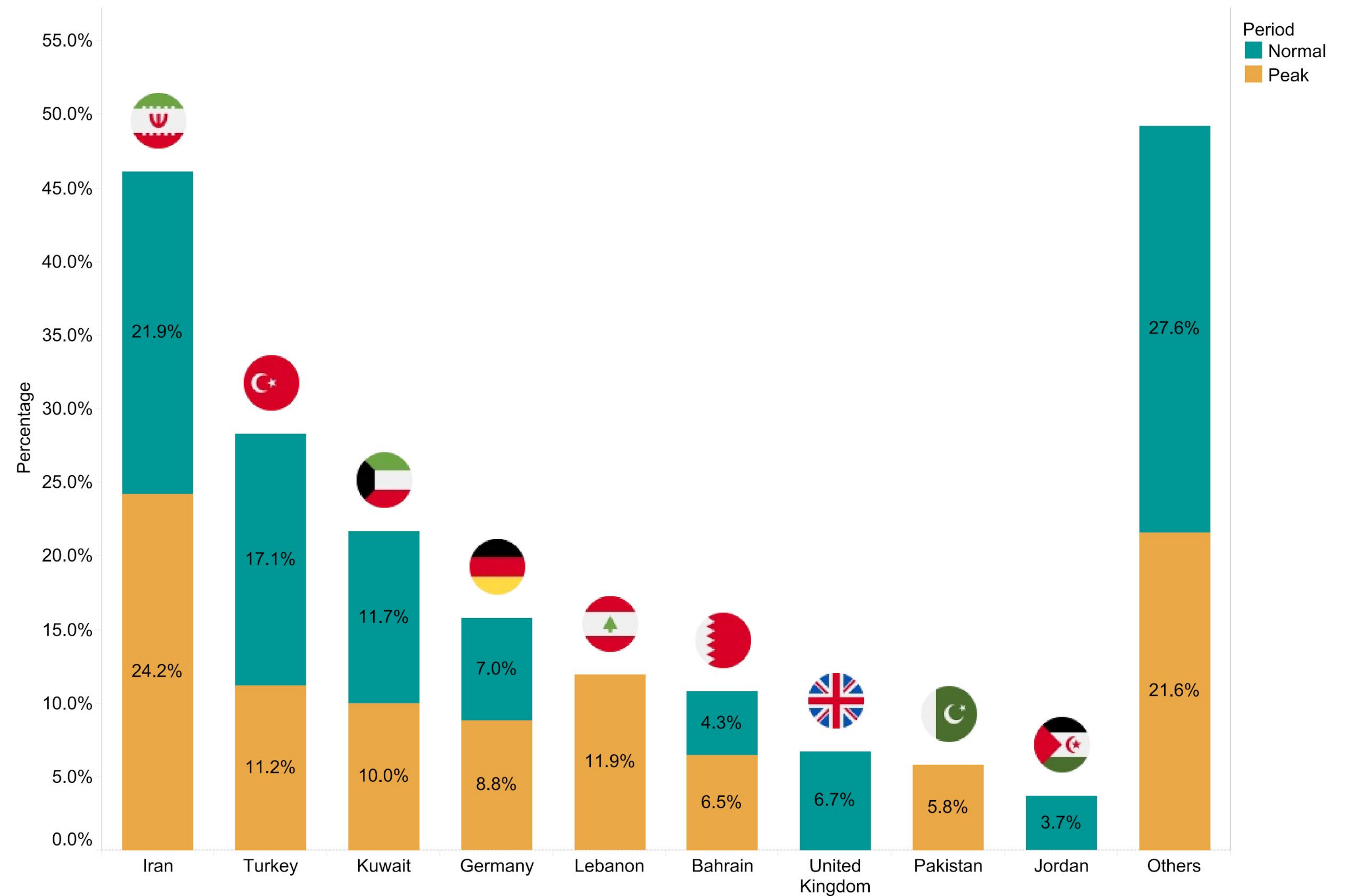
Tourism Expenditures

When examining tourism expenditures according to the top contributing countries of residence, Iran contributes to the majority of expenditures during both the normal and the peak periods.

The contribution of visitors who reside in Turkey increases slightly when examined according to the country of residence by around 4% in the normal duration and 3% during the peak, indicating that the increase might be caused by Iraqi visitors residing in Turkey.

A similar pattern is identified with other countries. Especially Germany and the United Kingdom, which reflects that Iraqis residing abroad are contributing to a share of international arrivals in Iraq.

Tourism Expenditure by Country of Residence



Source: COSIT, Tourism Expenditure Survey, 2019



Tourism Expenditures

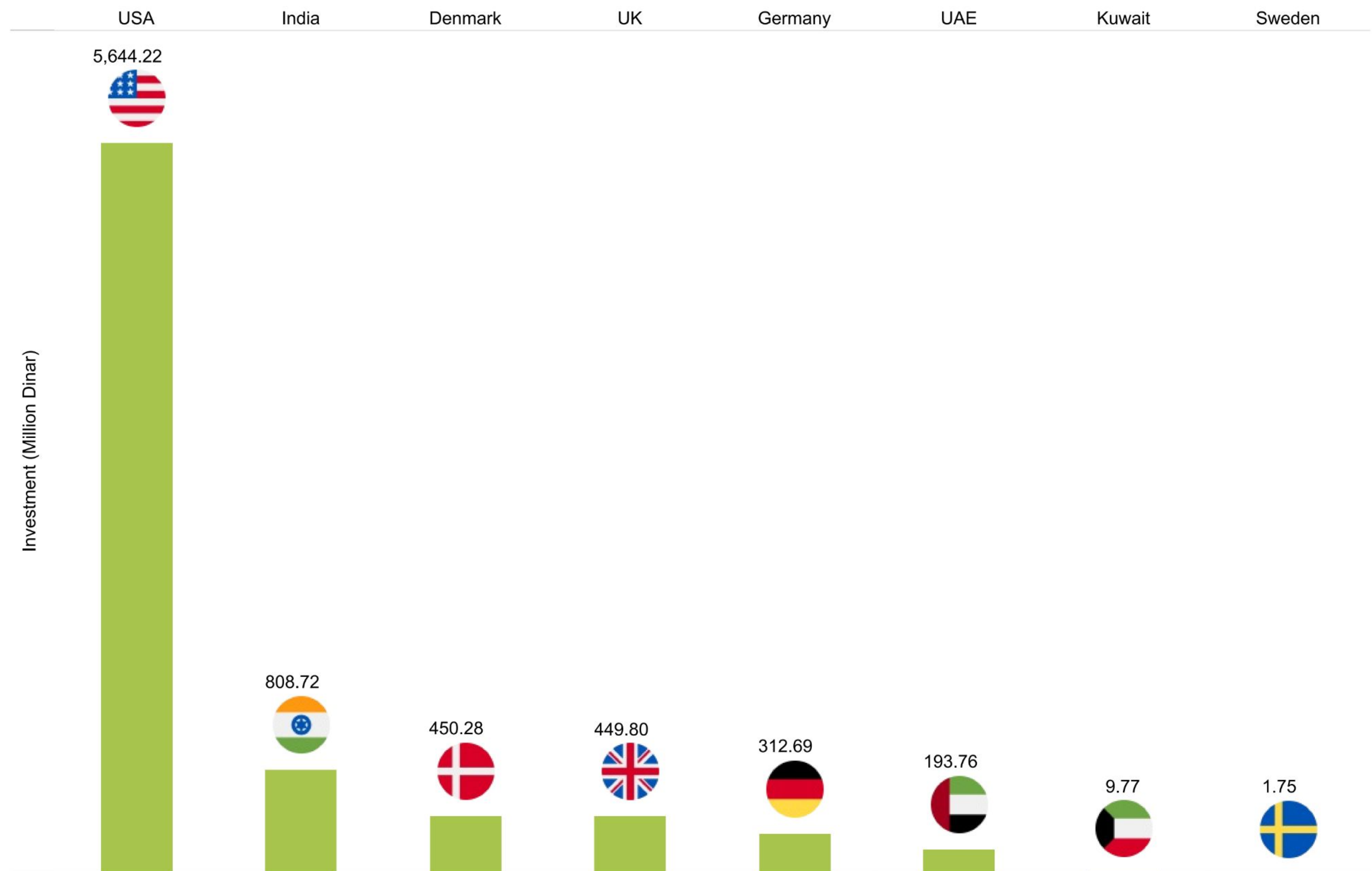
Expenditures on investment refer to any sort of investment made by visitors or tourists in Iraq including the purchase of a piece of land, house, car, or the construction or restoration of a house.

It is apparent that these investments have been made entirely by Iraqi tourists who reside abroad, the investments value has reached 7.88 billion IQD in 2019 during the normal duration of tourism.

Around 71.5% of the value of the total investment was made by Iraqis who reside in the United States, followed by around 10% that was made by Iraqis who are residing in India.

Both Iraqis residing in Denmark and the United Kingdom contributed to 5.7% and 5.6% of the total expenditure on investments, respectively.

Tourism Expenditure on Investment by Country of Residence



Source: COSIT, Tourism Expenditure Survey, 2019

Tourism Types and Purposes

Tourism is defined by the UNWTO as a social, cultural, and economic phenomenon that entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.

Tourism in broad is segmented into international tourism which includes outbound and inbound tourism and domestic tourism.

While tourism types are classified according to the purpose of the tourist trip.

The UNWTO has released a publication in 2019 to set the definitions for many types of tourism which included the following types:

- Cultural tourism
- Business tourism
- Ecotourism
- Gastronomy tourism
- Rural tourism
- Coastal, maritime, and inland water tourism
- Adventure tourism
- Urban/city tourism
- Health tourism
- Mountain tourism
- Wellness tourism
- Education tourism
- Medical tourism
- Sports tourism

In this report, the main tourism types have been selected to align with the most popular tourism purposes in Iraq and the type of sites and attractions that exist in the country. However, the tourism types and activities in Iraq are not limited to those covered in the report.

The report identified cultural and heritage tourism, nature and leisure tourism, and religious tourism as the main tourism types in order to further analyze and reflect on the economic impact and the main categories of tourism expenditure generated by those types of tourism. In addition, each type of tourism is followed by brief introductions of some of the most popular tourist attractions that fall into that type of tourism.

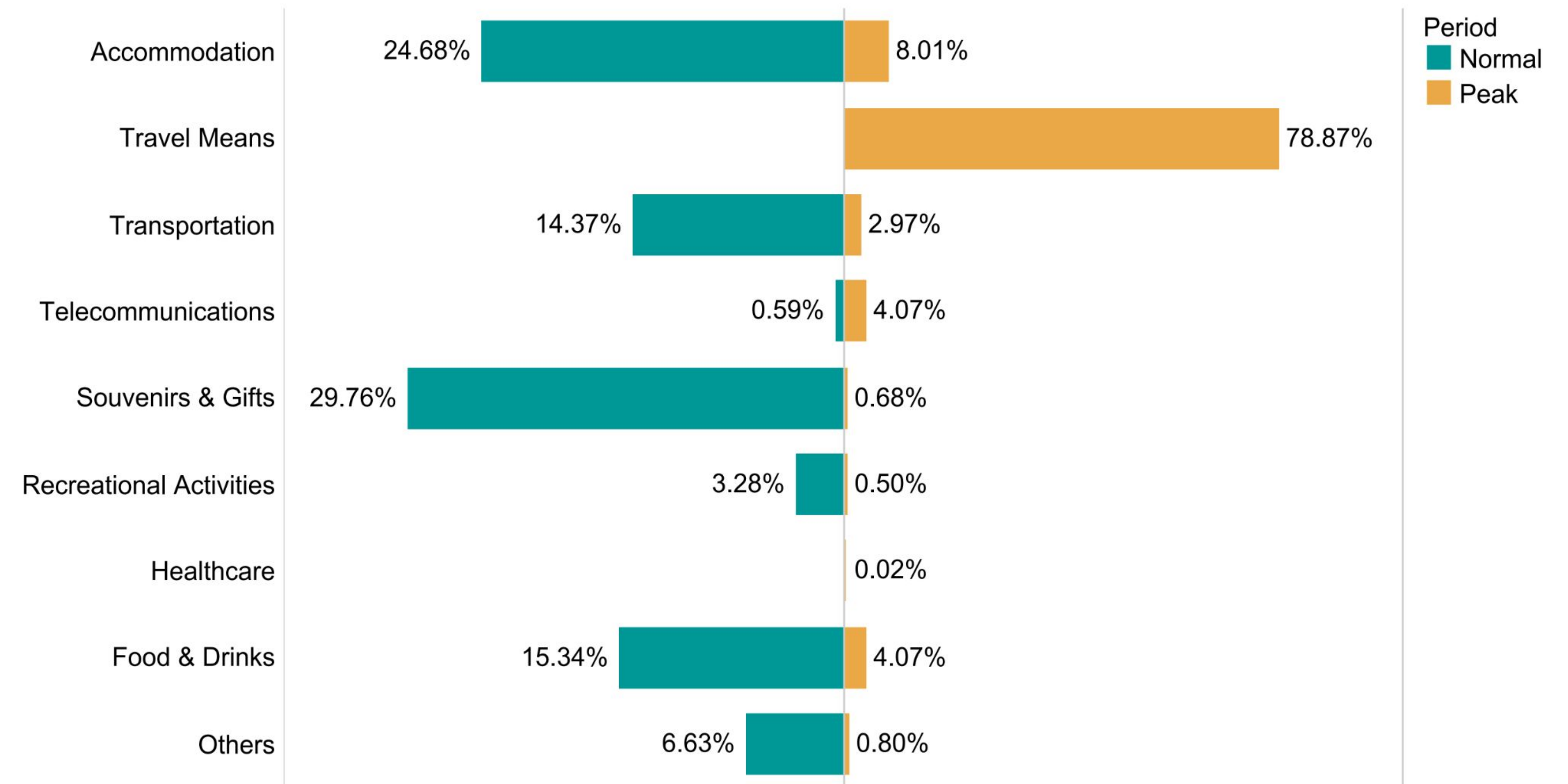
Culture and Heritage Tourism

The UNWTO defined cultural tourism in its publication, Tourism Definitions, as “ a type of tourism activity in which the visitor’s essential motivation is to learn, discover, experience, and consume the tangible and intangible cultural attractions/products in a tourism destination” (UNWTO, 2019).

Despite the variety of cultural and heritage attractions in Iraq, it seems that cultural tourism is not one of the main purposes for tourists. During peak times in 2019, only 4134 tourists stated their purpose of the trip to be heritage and culture tourism, whereas, during normal times, the number of tourists was significantly less. Which amounts to less than 1% of tourists.

Cultural tourism expenditures were estimated by 709,753 IQD during the normal period and 351.77 million IQD during the peak. The souvenirs, gifts, and all the other goods had the largest sum of expenditures with 29.76% followed by accommodation with 24.68% during the normal times. Whereas, during the peak, travel means were the main expenditures with 78.87%.

Relative Distribution of Tourism Expenditures for Cultural Tourism



Source: COSIT, Tourism Expenditure Survey, 2019



Culture and Heritage Tourist Attractions

- **Aqar Quf (Dur Kurigalzu):** Aqar Quf is located 30 km west of Baghdad and it dates back to around 1400 BC, The Ziggurat of Aqar Quf is one of the most prominent monuments at the site and it is 57 meters high, it is believed that it served a religious purpose and was used to worship the Mesopotamian god, Enlil, the god of wind and storms.
- **The Ziggurat of Ur:** is one of the largest ziggurats of Mesopotamia and the most prominent found monuments of Sumer, it was built around 2100 BC by the king of the third dynasty of Ur which is the last Sumerian, UR-Nammu. The ziggurat was established to worship the moon god, Nanna, and also served administrative purposes as the inscriptions found there have demonstrated. The three-storied ziggurat is located in Nasiriyah, the governorate of Thi Qar. The 210 by 150 feet site was under excavation from 1922-1934 by Sir Leonard Woolley sponsored by the British Museum and the University of Pennsylvania Museum.
- **Madrassa Al-Mustansiriya:** Al-Mustanisiriya school was built in the Abbasid age was finished in 1233 CE, it is built on an area of 4836 m² overlooking the bank of the Tigris River in Baghdad. The school was one of the oldest higher education institutions and taught many subjects including mathematics, astronomy, philosophy, Arabic, medicine, and others but most prominently it taught religion and Islamic law. Moreover, there is a training hospital and a library that is said to contain over 80,000 books and this collection grew over time. The school witnessed many restoration campaigns under the supervision of the Directorate of Antiquities and was later turned into the Museum of Islamic Art in Baghdad.



The Ziggurat of Ur

Source: Alaa Al-Marjani, REUTERS, 2021.

Culture and Heritage Tourist Attractions

- **The Abbasid Palace:** It is, one of the important buildings in Baghdad, dates back to the second Abbasid age, located near Bab Al-Mu'adham on the riverside. The Palace is composed of a central plaza and two-story rooms, adorned by brick-made stalactite works. The State Board for Monuments and Heritage performed maintenance on some parts of this building; when finished, some ancient monuments representing the Islamic history of Iraq were displayed.
- **Hatra:** Hatra was an ancient caravan city founded in the 2nd century BC, the ancient city is located 110 km southwest of the city of Mosul, Nineveh. The city is fortified with walls that protected it against Roman invasions. Moreover, Hatra was known as the "House of God" for the numerous temples, amongst the worshipped gods in those temples were the Greek god, Hermes, and the Mesopotamian god of the sun, Shamash. Hatra was listed as UNESCO World Heritage Site in 1985, and it is the first archeological site in Iraq to obtain this recognition. The ancient city experienced some damages and vandalism caused by ISIS, many artifacts, antiquities, and sculptures were demolished or looted. Hatra was liberated in late April 2017.
- **Al-Mada'in:** It is an important archeological city, which ruins stand on the east bank of Tigris some 30 km to the south of Baghdad center. Building it dates back to the second century BC. One of its most prominent milestones is its high arc that is called Taq Kisra which is a part of a great palace near Tigris. It dates back to the middle of the third century AD. This Taq is considered one of the biggest and highest brick-built arcs in the world.

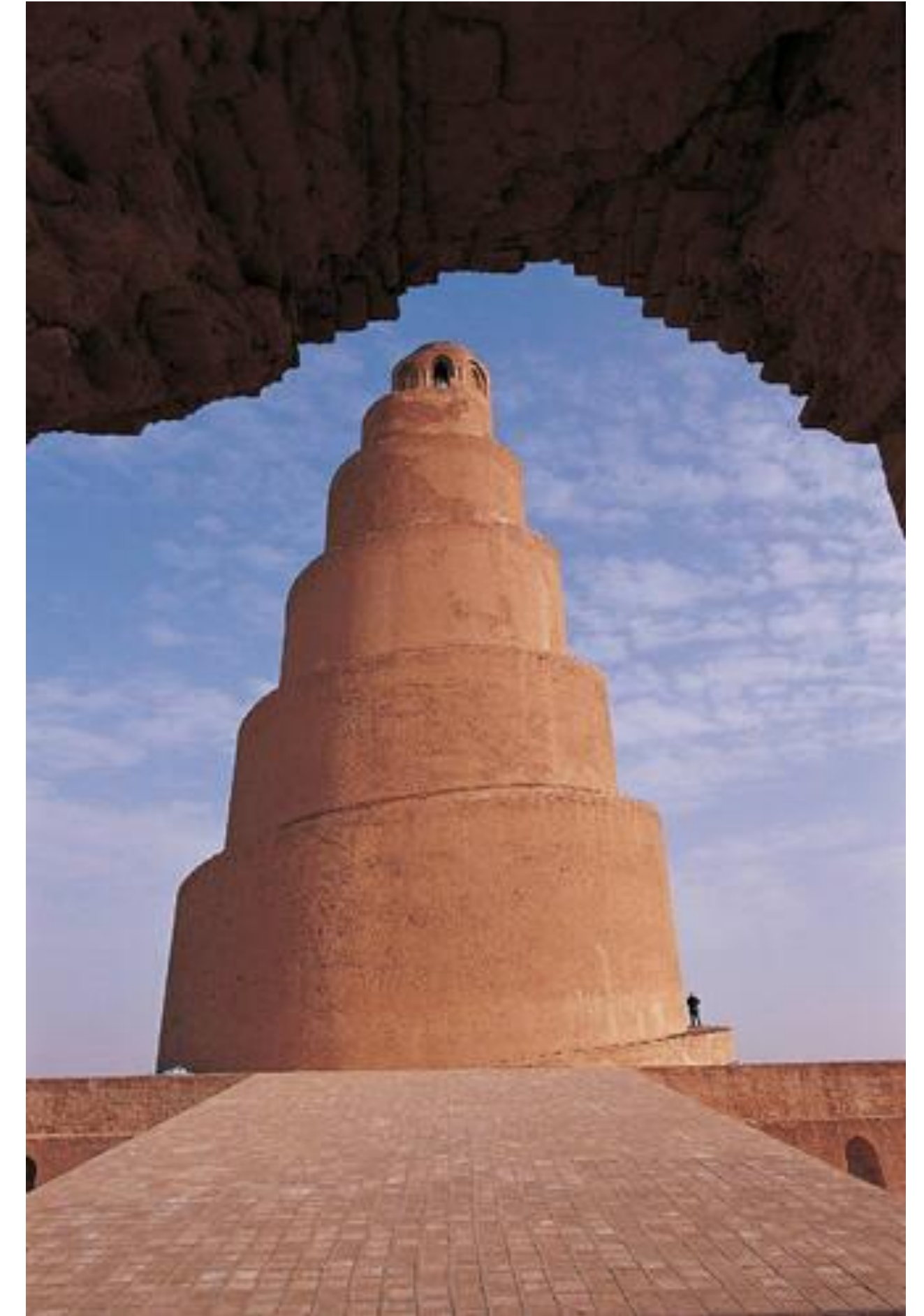


Hatra

Source: Suzanne Bott, UNESCO World Heritage.

Culture and Heritage Tourist Attractions

- **Museum of Iraq:** the museum was officially opened to the public in 1926. The museum was first established by the efforts of Gertrude Bell who was an archaeologist, writer, and a political figure who served as oriental secretary for the British in Iraq in order to preserve the culture, history, and heritage of Iraq during the excavation campaigns. The museum's catalog has a rich collection of pieces that dates back to early Mesopotamian civilizations like Assyrian, Akkadian, Babylonian. However, the museum suffered significantly after 2003, as a large number of pieces of the museum's catalog were looted. Yet, Iraqi authorities have successfully conducted the largest return of looted ancient artifacts on July 2021, when 17,000 archaeological artifacts were returned from Washington, USA.
- **The Ruins of Babylon:** the ancient ruins of Babylon where the capital of the Neo-Babylonian Empire stood tall, lie 85 km south of Baghdad, in Babil Governorate. The site was excavated by the German archeologist Robert Koldewey from 1899 until 1917. The ancient city ruins include a reconstruction of Ishtar Gate which is the eighth fortified gate of the city, a lion monument north of Ishtar Gate, a few mounds including Babil where a castle was built by Nebuchadnezzar used to take place, the remains of Etemenanki Ziggurat and Esagila temple that were dedicated for the god protector of Babylon, Marduk. The UNESCO recognized Babylon as one of the World Heritage sites in 2019.
- **Ashur (Qal'at Sherqat):** is the capital of the Assyrian Empire, located on 70 hectares of land on the banks of the river Tigris, in Saladin governorate. Ashur includes remains of old palaces, ziggurats, temples, and temples that were devoted to the goddess Ishtar and god Ashur. The site was inscribed on the list of UNESCO World Heritage in 2003.
- **Samarra Archaeological City:** the city is located in modern-day Saladin Governorate, it served as the capital to the Abbasid Caliphate from 836 to 892, the capital then transferred back to Baghdad. The city is representative of Islamic architecture. The city houses the Great Mosque of Samarra which was completed in 851 and is renowned for its spiral minaret (Malwiya) of 52 m and Abu Dalaf Mosque which was completed in 859 with a spiral minaret of 32 m. The city was recognized by UNESCO World Heritage in 2007.



The Spiral Minaret of Samarra
Source: Jean-Jacques Gelbart,
UNESCO World Heritage.

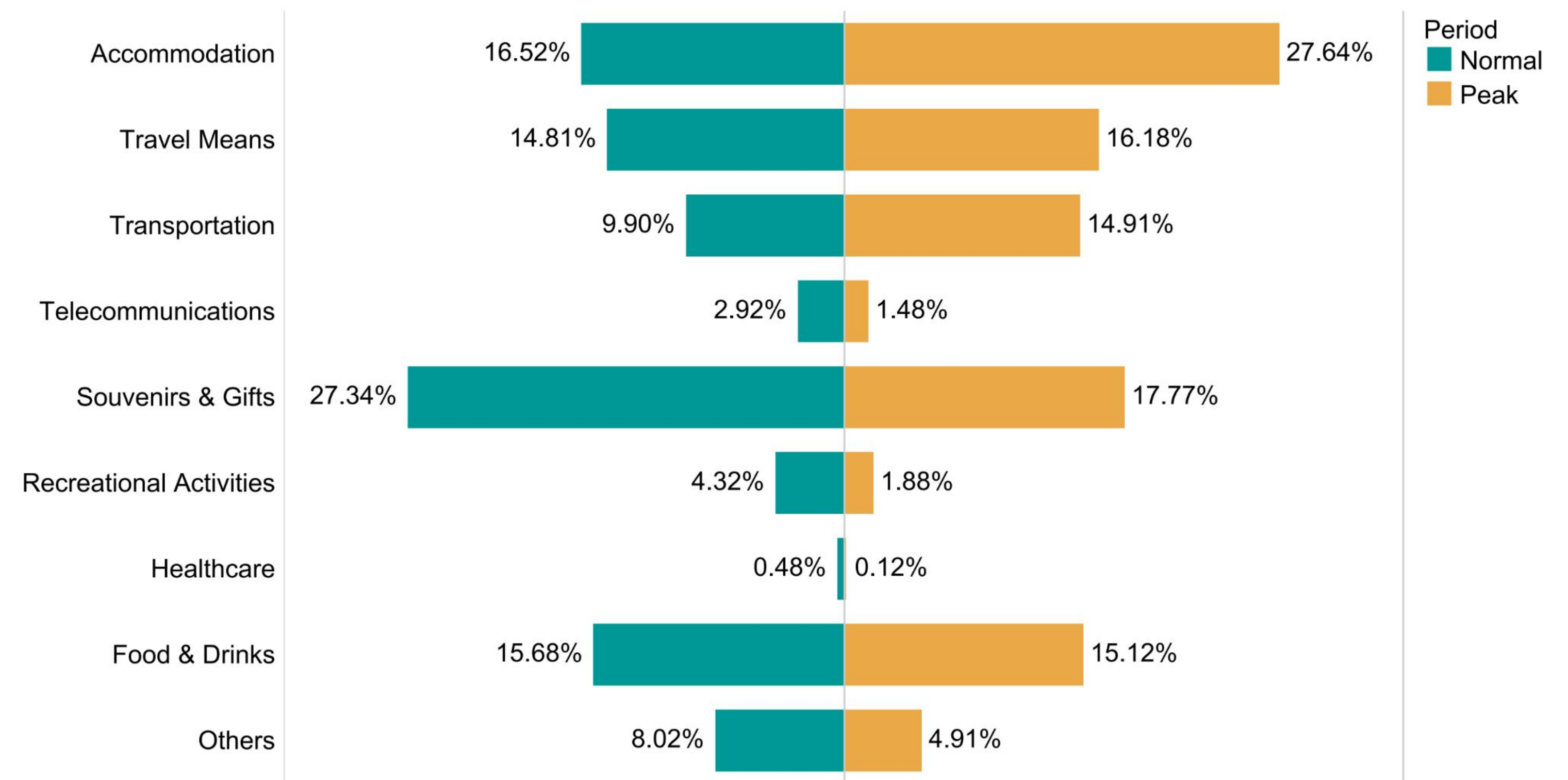
Leisure and Nature Tourism

Leisure and Nature tourism occupies a share of less than 8% of the Iraqi tourism sector. Tourists visiting Iraq for leisure contribute to only 6.7% of tourists during the normal season and 7.5% during the peak season.

Leisure tourism expenditures reached 395.76 million IQD during the normal period which amounts to 7.48% of total tourism expenditures in that duration with souvenirs and gifts being the largest share of expenditures with 27.34%. whereas 16.52% of the total sum was spent on accommodation, 14.8% on travel means, and 15.68% on food and drinks.

Whereas during the peak times, the leisure tourism expenditures reached 9.36 billion IQD, which contributes to 5.75% of total tourism expenditures during the peak. The accommodation has the largest share of expenditures with 27.64%, followed by souvenirs and gifts with 17.7%.

Relative Distribution of Tourism Expenditures for Leisure Tourism



Source: COSIT, Tourism Expenditure Survey, 2019

Leisure and Nature Tourist Attractions

- **Al-Habaniyah Lake:** is located west of Iraq, between Ramadi and Falluja in Anbar governorate. The lake occupies a surface area of 140 km², it used for storing floodwater from the Euphrates and irrigation purposes. It also serves as a tourist attraction. Al-Habbaniyah resort was opened in 1979. It has 500 fully furnished chalets, a six-story hotel, restaurants, playgrounds, swimming pools. The Iraqi National Investment Commission has opened/ unveiled a 25 million USD investment opportunity in 2018 to revive and develop this area. In 2020, the Minister of Planning has announced that a contract with the South Korean company, TRAC Group, has been signed to build the Habbaniya City which will occupy an area of 30 km², and includes housing units, hotels, resorts, universities, schools, recreational facilities. The project will be divided into 3 phases, in which the first phase will be completed in 5 years.
- **The Marshlands:** are wetlands that extend in the south of Iraq on an area of 35,572 km². The marshes provide a biodiverse ecosystem for many species of plants and animals and are renowned for growing reeds. The most prominent marshes include Al-Hawizeh, Al-Hammar, Al-Chebayish, and Central marshes. The marshes of Iraq have joined the list of UNESCO World Heritage in 2016.



The Chebayesh marsh in Nassiriya

Source: Thaier al-Sudani, REUTERS, 2013.

Leisure and Nature Tourist Attractions

- **Al-Jadriya Lake:** is an artificial lake that occupies an area of 270 Dunams of what used to be agricultural land that overlooks the banks of the River Tigris. The lake was opened in 2002, it has restaurants and a recreational park. The Ministry of Culture, Tourism, and Antiquities signed an investment agreement in 2015 in order to further develop and revive this resort, the project was supposed to be executed in 5 years.
- **Al-Zawraa Park:** is a public park located in Baghdad, the park was established in the 1970s and involves a zoo, an amusement park, gardens, and cafeterias.
- **Sawa Lake:** is a closed drainage basin lake, located in the midst of the desert in Samawa, Al-Muthanna governorate near the Euphrates river. It occupies 12.5 km² and originates from the groundwater. Lake Sawa is characterized by its high salinity and sulfur content.
- **Mosul Forests:** the forests were initiated in 1954 and extend on an area of approximately 900 Donum with extended greenery of a variety of trees like pines and elm and a view of the Tigris. The forests also surround restaurants, cafes, and parks, and a tourist village.
- **Baghdad Island:** is a park in the north of Baghdad surrounded by the Tigris. It was first opened in 1983. The park encompasses extended green areas, cafes, restaurants, a water park, and an amusement park.
- **Sindibad Island:** is a tourist island in the middle of Shat Al-Arab in Basra. Wide gardens occupy the island along with cafes, restaurants, and chalets. The Ministry of Culture, Tourism, and Antiquities has signed an initial contract of 64 million USD with three companies to develop the island as a main tourist attraction.
- **Ain Al-Tamr:** is a city located west of Karbala. The oasis is renowned for its mineral springs, and vast orchards with palm trees. The oasis also lies near Al-Razzaza lake, which is the second largest lake in Iraq.

Religious Tourism

Religious tourism is the main type of tourism in Iraq, covering the largest share of the tourism market size in Iraq. Iraq is renowned for its holy shrines and mausoleums, hence, receiving the majority of tourists during the peak season.

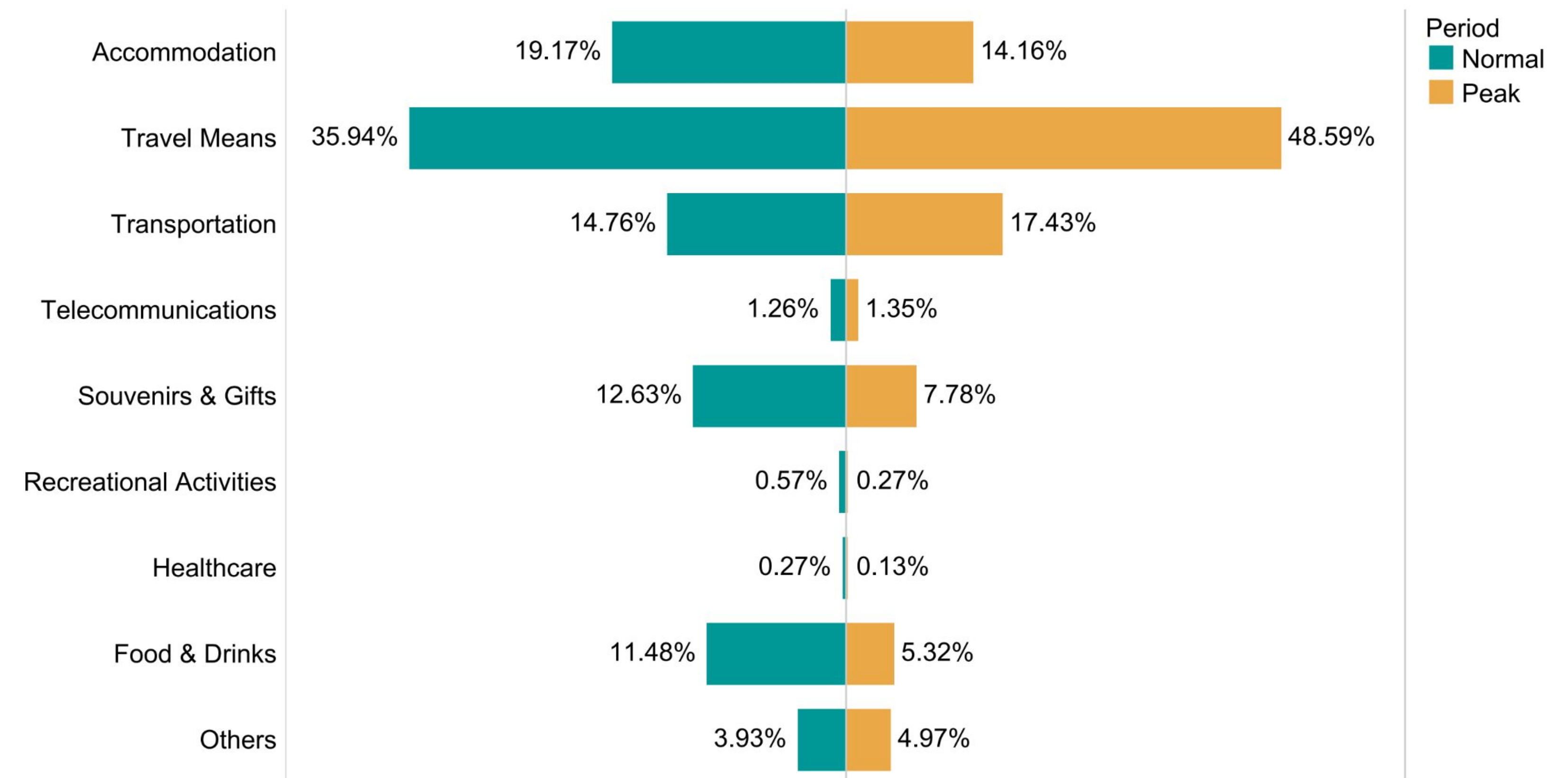
In 2019, the number of tourists during the peak season was 4.32 million people equivalent to 72.1% of total tourists.

Religious tourism expenditures reached 1.56 billion IQD in the normal period which amounts to around 29.6% of total tourism expenditures.

Whereas during peak times, religious tourism expenditures reached 87.11 billion IQD, which contributes to 53.5% of total tourism expenditures.

Travel means is the main expense during both the normal and peak seasons with 35.9% and 48.5% respectively. It is followed by accommodation during the normal times with 19.17% and transportation during the peak times with 17.4%.

Relative Distribution of Tourism Expenditures for Religious Tourism



Source: COSIT, Tourism Expenditure Survey, 2019

Religious Tourist Attractions

- **Imam Ali Holy Shrine:** is a shrine in Najaf governorate where the tomb of Imam Ali is located. The Shrine has a golden dome and two minarets and welcomes millions of Muslims each year who visit the sanctum.
- **Imam Hussein Holy Shrine:** is a mausoleum that was constructed on the burial site of Imam Hussein in Karbala. Annually, during the Arba'een observance which marks 40 days after the martyrdom of the Imam on the 10th of Muharram of the Islamic Calendar, millions of Muslim pilgrims pay tribute by walking to the Holy Shrine.
- **Al-Abbas Shrine:** the mausoleum of Al-Abbas, located in Karbala, nearby the Holy Shrine of Imam Hussein. The shrine has a main golden dome and two minarets and has gone through a series of renovations in order to accommodate the increasing number of visitors.
- **Al-Kadhimiya Holy Shrine:** is a mausoleum that was erected around the burial site of Imam Musa Al-Kadhim and his grandson Imam Mohammed Al-Jawad, in Baghdad on the west bank of the Tigris. The first construction of the shrine dates back to around 799 after the martyrdom of Imam Al-Kadhim and went through successive stages of construction, restoration, and expansions. The shrine has two domes and four gold-coated minarets.
- **Abu Hanifa:** the mosque is located in Baghdad where the tomb of Abu Hanifa is, who was a Muslim scholar, jurists and theologian (699-767), he established the doctrines of legal Islamic laws known as the Hanafi school. The mosque is a center of pilgrims from many nationalities who follow the Hanafi School.



Imam Hussein Holy Shrine

Source: Imam Hussein Organization,
2020.

Religious Tourist Attractions

- **Mausoleum of Abdul-Qadir Gilani:** Abdul Qadir Gilani was a Muslim jurist of the Hanbali school and Sufi order, whose burial was in his school that turned later to shrine. The existing dome and complex today were built by Mimar Sinan during the reign of the Ottoman Empire in 1535 after they were destroyed during the Safavid invasion.
- **The Monastery of St. Matthew:** is a monastery for the Syriac Orthodox Church, which was established in 363 by the Assyrian king Sennacherib for Saint Matthew in Nineveh, north of Iraq, on top of Mount Maqlub.
- **Daniel's Tomb:** is believed to be the resting place of Prophet Daniel, it is located in the Citadel of Kirkuk. The site of the tomb was a Jewish temple that was then turned into a church and then a mosque. The tombs of the Prophet Uzair and Prophet Hunain also lie in the shrine.
- **The Shrine of Nahum:** is a coated stone building where the resting place of prophet Nahum takes place in Alqosh in Nineveh, north of Iraq. the Shrine also includes a synagogue, the tomb of Sara, Nahum's sister, and a school. The shrine witnessed restoration work that commenced in 2018 by the Alliance for the Restoration of Cultural Heritage (ARCH) in collaboration with GEMA Art International and the support of the governments of KRI and the USA.



Saint Matthew Monastery

Source: Alexander Marquardt, ABC News, 2016.

Tourism in Kurdistan Region

The Kurdistan Region has been a favorite destination for many tourists, especially for domestic tourism. The region is teemed with a variety of leisure, nature, and archaeological sites that attract tourists especially during the summer season where the temperature is milder than the rest of the country, this earned Erbil the title of the Arab Tourism Capital in 2014. Tourism revenues exceeded \$1 billion in 2013 (Save the Children, 2014).

According to the Kurdistan Region Statistics Office data for 2016, the number of tourism units including hotels, motels, complexes reached 577, with 4,823 employees, 1,238,438 guests, and 204.6 billion IQD income.

In addition, Kurdistan has three international airports located in each of its governorates. Erbil International Airport which was first opened in 2005, the airport was expanded and modernized with an investment of \$450 million that was funded by KRI government and opened in March 2010. Erbil International Airport has served 14.4 million passengers since 2006, 1.9 million passengers in 2019 alone. Whereas the Sulaimaniyah International Airport was opened in September 2005 with a capacity of 1.5 million passengers. The region has also invested \$450 million to build Duhok International Airport, the first foundation stone was set in 2012.

The region also issues a visa on arrival that is valid for 30 days for citizens from over 40 nations including the European Union, Australia, New Zealand, Canada, and the United States in order to facilitate foreign investment and international tourism.



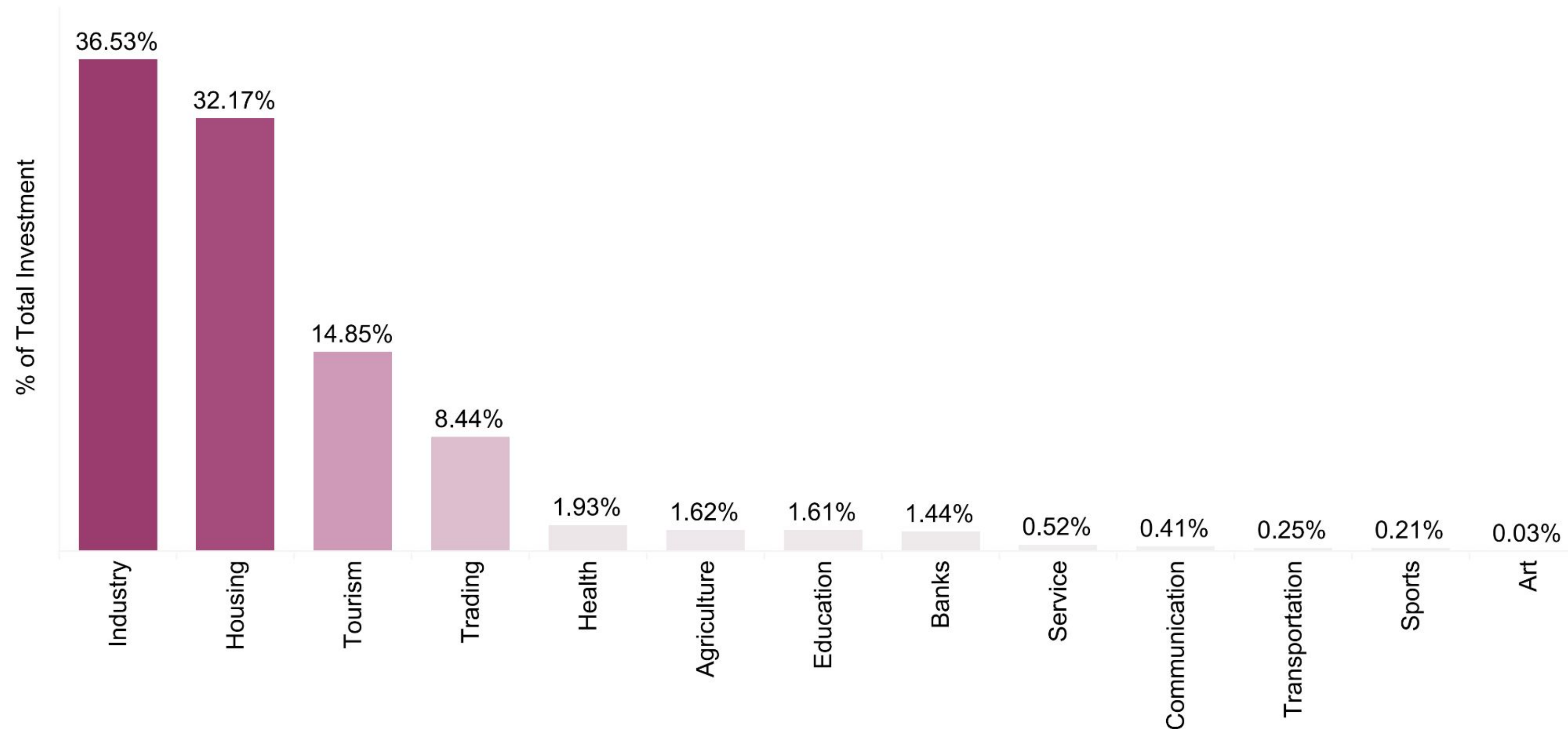
Darbandikhan Lake

Source: Brand KRI, 2021.

Tourism in Kurdistan Region

The region has been working in order to develop the tourism infrastructure and facilities to further promote this sector and capitalize on its vitality. The Kurdistan Investment Commission has licensed a total of 161 projects from 2006 to 2020 in the tourism sector and invested a total of \$7.79 billion which amounts to 14.85% of total investment in all sectors distributed as follows; \$5.53 billion for 82 projects in Erbil governorate, \$853.64 million for 59 projects in Duhok, and \$1.41 billion for 20 projects in Sulaimanya.

The Investment by Sector in Kurdistan Region (2006 - 2020)



Source: Kurdistan Region, Board of Investment, Studies and Information Department, Directorate of Information, 2006-2020.

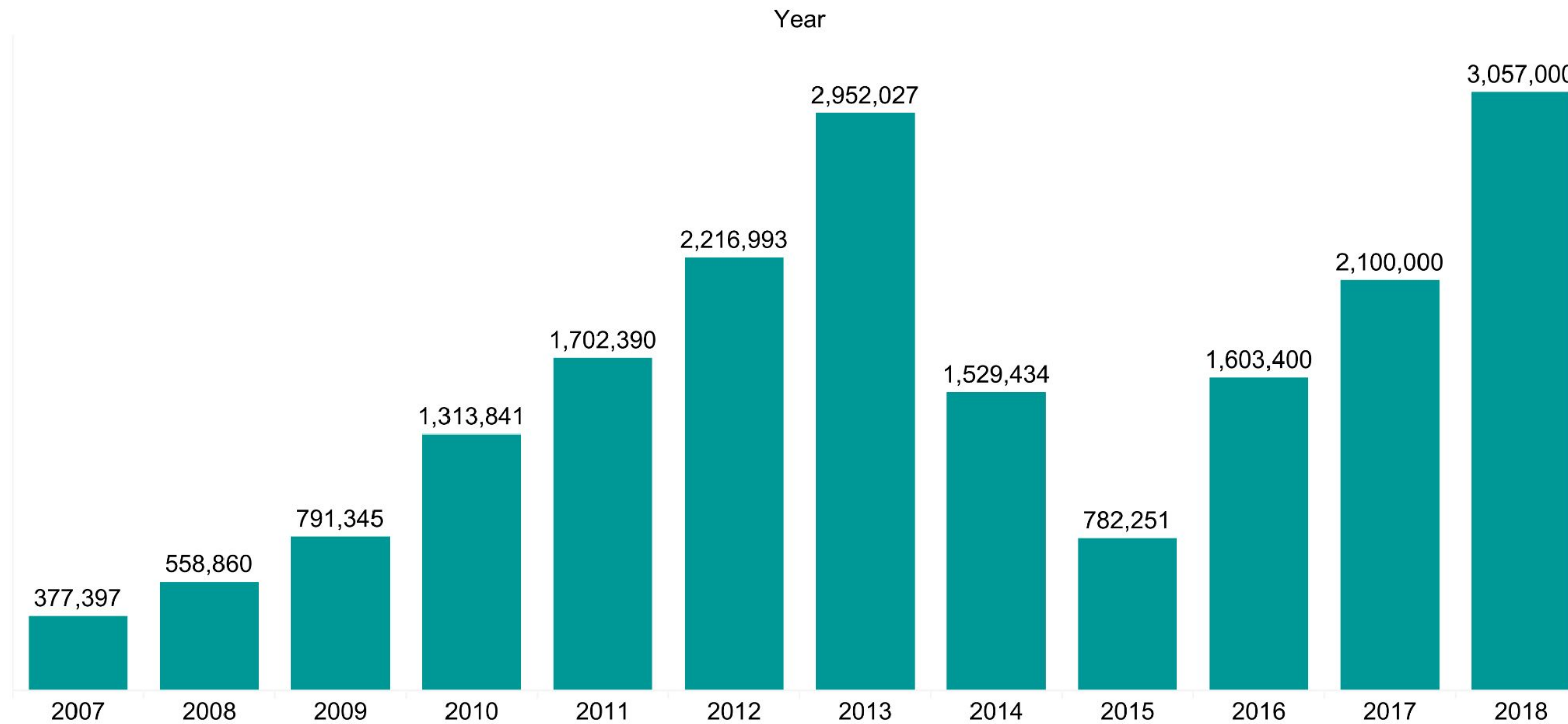


Tourism in Kurdistan Region

Kurdistan region has welcomed a continuously increasing number of tourists since 2007. Domestic tourism contributed to 66% of the tourist arrivals in KRI in 2012, while 14% are residents of the region. The remaining 20% are international tourists from neighboring countries (Invest In Group, 2013).

The number of tourists reached 2.95 million tourists in 2013 before it started to decline. The region experienced a fall in the number of tourists in 2014 and 2015 due to the conflict and violence caused by ISIS as tourist arrivals descended to an all-time low of 782,251 tourists, which is the lowest record since 791,345 tourists arrivals in 2009. However, the sector has soon recovered and welcomed 1.6 million tourists in 2016, which grew to 2.1 million tourists in 2017 and around 3 million tourists in 2018.

Tourists Arrival in Kurdistan Region



Source: The General Board of Tourism of Kurdistan.



Tourist Sites in Kurdistan Region

- **Erbil Citadel:** is situated over a mound of around 32 meters high overlooking the city of Erbil, the citadel town encompasses some houses and buildings extending to an area of 15 hectares and dates back to 5000 BC. The site witnessed renovation and restoration after the establishment of the High Commission for Erbil Citadel Revitalization in 2007. The Citadel was inscribed as a World Heritage Site in 2014 to become the fourth site in Iraq to be recognized in this list.
- **Erbil Civilization Museum:** is an archaeology museum located in Erbil that was first opened in 1961, the museum was later relocated in the 70s and fully completed in 1989, its collection grew to include artifacts and antiquities from the prehistoric period until the late Abbasid era.
- **The Kurdish Textile Museum:** is a museum that exhibits and showcases the heritage and history of textile in the region from the material used to the processes practiced in this craft. The museum was founded in 2004 and takes place in the Citadel of Erbil.
- **Shanadar Park:** is a recreational park located in Erbil, the park offers an extended greenery around a lake, in addition to many streams, and is crossed by a cable car. In 2009, the Shanidar art gallery, which takes place in the park, opened its doors to visitors.



Erbil Citadel

Source: The British Institute for the Study of Iraq, Richard Wilding, 2015.

Tourist Sites in Kurdistan Region

- **Korek Mountain:** is a mountain located west of Rawanduz in Erbil with an elevation of 2,100 meters. The mountain has a resort located on the summit with 132 residential villas, restaurant, and a cafe and is crossed by a cable car. The resort has been a popular tourist destination especially in winter where tourists can enjoy skiing.
- **Shaqlawa:** is a city located around 50 km northwest of Erbil, renowned for its nature, streams, waterfalls, resorts, and recreational areas and facilities which makes it a popular tourist destination.
- **Sulaymaniyah Museum:** is the second largest archeological museum in Iraq that was founded in 1961 in the downtown of Sulaimania then relocated in 1979 to its current building. The museum houses a rich collection of artifacts from the prehistoric period until the Islamic Era. The museum has been through a series of renovations in collaboration with UNESCO resulting in a reconstruction of the halls that were opened in 2013 and the establishment of an education department.
- **Bekhal Waterfall:** the waterfall flows down mountains from a spring west of Rawanduz in Erbil governorate. The area encompasses a variety of restaurants, cafes, tourist facilities and a resort that are immersed with tourists during the heat of the summer.



Korek Mountain

Source: Brand KRI, 2020.

Tourist Sites in Kurdistan Region

- **Geli Ali Begg Waterfall:** is the longest waterfall in Iraq, situated north of Erbil between Korek and Bradost mountains, cascading from over 10 meters height into a rocky valley.
- **Shanidar Cave:** is a cave located on the Bradost mountain range, the cave in one of the most popular archeological sites due to the excavations of skeletal remains of Neanderthal by Ralph Solecki and a team from Columbia University in the 1950s. In 2014, a team of archaeologists from the University of Cambridge initiated the Shanidar Cave Project, and a new series of excavations was conducted between 2015 and 2019 where new remains were found.
- **Lake Dukan:** is a reservoir lake in Ranya Plain, Sulaimaniya, the lake is flooded by water from the Little Zab through the Dukan Dam that started fully operating in 1979. The lake occupies a surface area of 270 km² and is used for many purposes like irrigation and power generation, but it also serves as a very popular tourist destination. It is nestled in the beautiful nature of the region and surrounded by restaurants, rental cabins, and cafes.



Shanidar Cave

Source: Brand KRI, 2020.

The Hospitality Sector

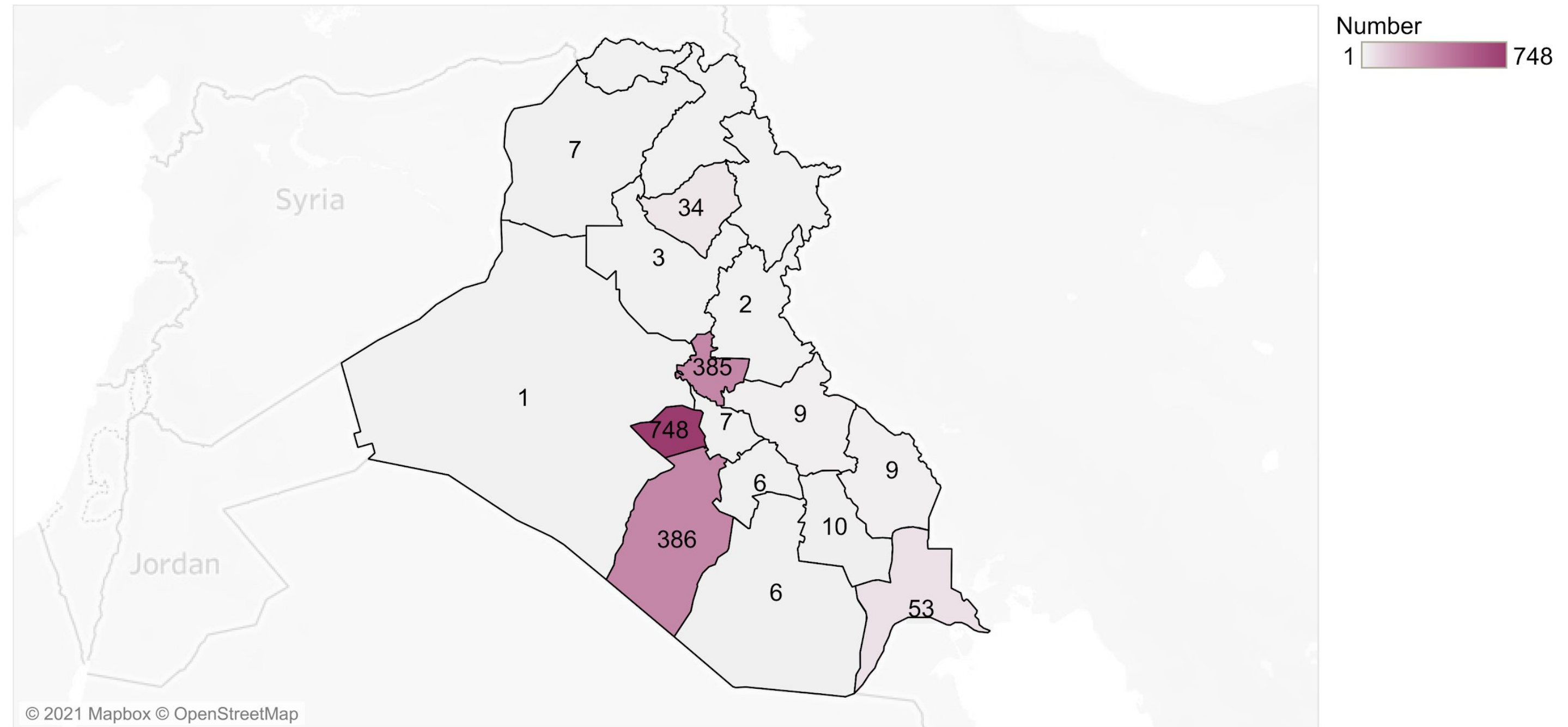
The hospitality sector is a broad umbrella term that comprises many industries and sectors including food and beverage, accommodation, entertainment and recreation, and travel and tourism.

The hospitality sector is the main pillar for the thrive and prosperity of the tourism sector, in addition to its vital contribution to other industries and its role in job creation. This sector in Iraq accounts for one of the biggest private sectors in the country, as 84% of the shares of this sector are private.

The growing demand for hotels, restaurants, cafes, malls and other facilities has pushed the development of this sector in Iraq. The size of this sector is estimated at 2.3 trillion Iraqi dinars in 2015, however, it contributes to only 1.7% of the non-oil GDP and 1% to 2% of employment. Around 40% of this sector takes place in KRI with an estimated size of 0.9 trillion IQD and contributes to 3.1% of KRI non-oil GDP. Restaurants hold the largest share of this sector as it was estimated to contribute to a swapping 89% of this sector in Iraq and 77% in KRI in 2013. (UNESCO, 2019).

The number of hotels and tourist accommodations has reached 1666 accommodations in 2018. The majority of these complexes are located in Karbala by 44.9%, while Baghdad has a share of 23.1% and Najaf has 23.2%. The private sector prevails in the hospitality industry as 99.6% of tourist accommodations are private (CSO, 2018).

The Number of Hotels and Tourist Accommodation by Governorate



Source: Central Statistical Organization, Gross Indicators of Hotels and Tourist Accommodation Complexes Activity, 2018

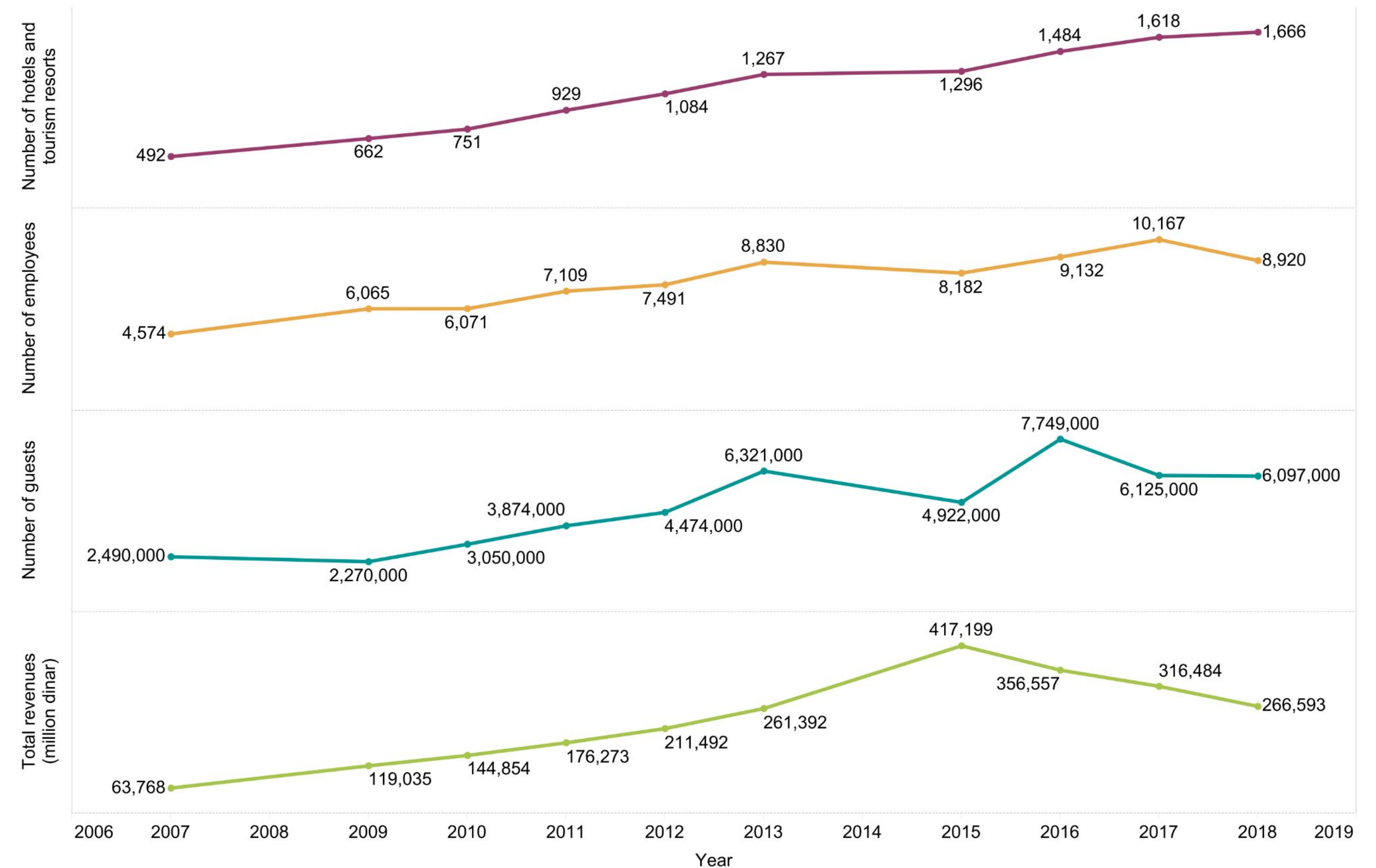
The Hospitality Sector

According to the Central Statistical Organization, the number of hotels and tourist accommodations has been experiencing a steady increase since 2007 until it reached 1,666 complex in 2018 which is a 3% increase since 2017. Whereas the number of employees experienced a drop of 3.7% in 2015 compared to 2013 as it decreased from 8,830 to 8,182 which could be attributed to the conflict and violence caused by ISIS. The number of employees started to recover slowly after 2015 but it declined again to reach 8,920 employees in 2018 which is a 12.3% reduction compared to the number of employees in 2017.

The number of guests was heavily impacted by the political and security upheaval, as it declined by 11.8% to reach 4.92 million in 2015 compared to 6.32 million in 2013. The number of guests bounced to 7.74 million in 2016 which is the highest record since 2007 but experienced a slight fall of 0.5% in 2018 compared to 2017. In 2018, the majority of 42.7% of the guests stayed in Baghdad while 37.2% stayed in Karbala, and 20.2% in Najaf.

The generated revenues have been experiencing a decline since 2015, as they reached 266,593 million IQD in 2018 which is a 15.8% decrease compared to 316,484 million IQD in 2017. Around 37% of the revenues in 2018 were generated by tourist accommodations in Baghdad, followed by 34.7% in Karbala, and 17.3% in Najaf.

Gross Indicators of Hotels and Tourist Accommodation Complexes Activity (2007-2018)



Source: Central Statistical Organization, Gross Indicators of Hotels and Tourist Accommodation Complexes Activity (2007- 2018)



Main Issues in the Tourism Sector

- **The lag in the ICT:** Iraq still lacks ICT development and infrastructure in many aspects which negatively affects the attractiveness of the country as a tourist destination. For example accommodations, tour agents, and recreational sites lack online booking systems and are reluctant to online payments. In addition to the overdependence on cash transactions and the lack of points of sales and ATMs. Furthermore, the absence of e-governance applications and the limited online resources regarding the tourism sites and attractions further disrupt the touristic experience for visitors and tourists.
- **Inadequate vocational education:** Tourism and hospitality vocational training and education are essential to equip the workforce with the necessary skills set to further promote the sustainable growth of this sector. There are 9 branches for tourism and hospitality centers distributed in Nineveh, Najaf, Karbala, Thi-Qar, Basrah, Muthanna, and three branches in Baghdad. The centers have 4 programs including cooking, hotel management, reception, and accommodation. The program's duration is three years. The enrollment rate in 2015-2016 was 756 students total only (UNESCO, 2019). In addition, the vocational training track, which also lasts 3 years, offers tourism management as a part of the trade program and tourism administration has been opened very recently. However, the curricula are inadequate and the enrolment rate is insufficient to match the demands of the tourism sector to generate a positive economic impact.
- **Political upheaval and insecurity:** political stability is an important factor that weighs in the number of inbound and domestic tourists. A large part of Iraq was under the control of ISIS for four years which significantly affected the number of tourists, KRI experienced 48% decrease in the number of tourists in 2014 and another 48.8% in 2015. Whereas the expenditure of Iraq's outbound tourism increased 26% in 2014 which could indicate that Iraqis have started to seek international destinations. The violence and conflict have also led to major damage and destruction of cultural, historical, archeological, and religious sites that not only serve as important tourist attractions but most importantly provide evidence of the heritage, history, and culture of Iraq. The denomination of ISIS has caused damage to 41 heritage sites in Nineveh alone (RASHID, 2017).
- **The neglect of tourism infrastructure and facilities:** tourism relies on the integration of complementary services and products. The development of the tourists' facilities such as hotels, resorts, restaurants, cafes, and the maintenance and improvement of tourist sites and attractions, in addition to other services such as tour guides, translators, maps, signs, paved roads, are all building blocks for constructing the tourism sector.

Initiatives in the Iraqi Tourism Sector



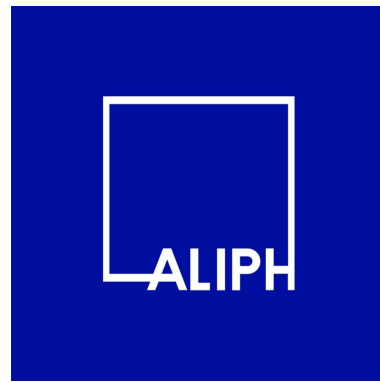
Project Sumereen: Sumerian Youth for Economic Development and Cultural Heritage project was launched in 2020 and is a part of an implementation plan by the United Nations Development Programme (UNDP) in order to support the socio-economic growth and revive the tourism sector in the governorate of Thi Qar, Iraq through eco-tourism and the cultural heritage preservation. This would be achieved through attending to the important tourist attractions and infrastructure in Ur and the marshlands. In addition to vocational training in the fields of tourism and environment and promotion of employment opportunities in this sector. The project has obtained funding of 2 million USD from the European Union for a duration of 2 years. Furthermore, it is executed with the collaboration of the governorate of Thi Qar and few non-governmental organizations such as Humat Dijla, Un Ponte Per, Safina Projects, and others.



IHSP

Iraq Heritage Stabilization Program (IHSP): is an initiative founded in 2018 based in the University of Pennsylvania's Department of Near Eastern Languages and civilizations. The program has received a funding of 2 million USD from the US Department of State in dedicated efforts to preserve, stabilize, and restore the Iraqi heritage in northern parts of Iraq that have suffered immensely the consequences of violence and conflict in addition to conducting assessment surveys. The program works in partnership with many entities and institutions including the Iraqi State Board of Antiquities and Heritage, Nineveh Inspectorate, Chaldean Catholic Church, Yezidi Spiritual Council, University of Mosul Engineering Consulting Bureau, and many others. The program conducted numerous projects to restore and secure many sites including the chapel and church of Deir Mar Gorgis, Beit Al-Tutunji, Sanctuary of Sheikh Adi, Prophet Yunus Cemetery, Qara Serai, and several others.

Initiatives in the Iraqi Tourism Sector



ALIPH Foundation: the International Alliance for Protection of Heritage in Conflict Areas was founded in 2017, in Geneva, Switzerland, and has conducted over 100 projects in 22 countries across 4 continents with an amount of funding estimated at 31 million USD. The initiative conducted 28 projects in Iraq alone and committed funding of 9.2 million USD. The rehabilitation of the Mosul Museum in 2018 was one of the foundation's first projects in partnership with the Louvre Museum and Smithsons Institution in Washington, at the request of the Iraqi State Board of Antiquities and Heritage, and was awarded 1.3 million USD of funding for a duration of 5 years. Other projects included the rehabilitation of the Mar Behnam Monastery in Nineveh plain, the prevention of the collapse of Taq Kasra south of Baghdad, the rehabilitation and restoration of Hatra, and numerous others. Furthermore, ALIPH has been working closely with the National Library of France (BnF), the State Board of Antiquities and Heritage, the Chaldean Antonian Order of Saint Hormizd, the French Institut National du Patrimoine, and many other local and international partners in efforts to digitize many historic manuscripts, archives, and codices, which will preserve the history, heritage, and culture in times of conflict.



IRAQ HERITAGE

Iraq Heritage: is a non-profit organization that was founded in early 2013. The organization seeks to preserve the history, heritage, and culture of Iraq. The organization undertook the mission to provide the government and other stakeholders with the necessary information and expertise to preserve and care for the heritage sites in Iraq, it also provides grants and encourages investments in these sites. Other services include consultancy and information services, and research and development.

ICT Development in the Tourism Sector

The digital transformation has immensely influenced our modern-day life and has impacted many sectors, industries, and business models, which in return, led to the growth and expansions of those sectors, in addition to the emergence of new trends and solutions. Information and communications technology (ICT) has contributed to the acceleration of the expansion of the tourism industry globally. ICT solutions are well adopted by the tourism industry in many aspects such as online visas, automated online booking systems for transportations and accommodations, online reviews, geopositioning, maps, guides, and others. Consequently, increasing tourism accessibility and reliable information availability.

In addition, ICT facilitates coordination processes and promotes seamless transactions and personalized user experiences. Moreover, it increases the efficiency and fosters the development of this sector by advancing the technologies used by businesses and enterprises.

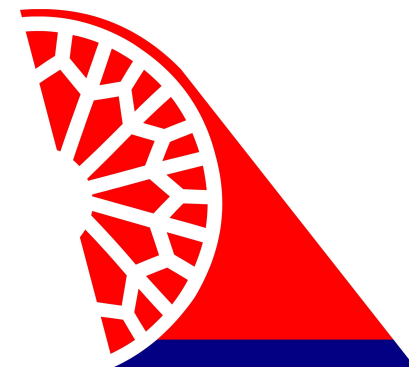
Globally, online sales channels have dominated the tourism and travel sector as 63% of the sales were made online, this figure is projected to grow to 71% in 2024. Whereas the market size of online travel agents reached 432 billion USD and online booking platforms amounted to 517.8 billion USD (Statista, 2021). These numbers are forecasted to further grow as the tourism sector starts to recover from the impact of COVID-19 pandemic and the global shift that many industries are embracing to minimize in-person contact.

Iraq has been opening up to the world after 2003, this was accompanied by increasing interest in the culture and nature of other countries which caused the demand for tourism companies and travel agents to increase despite the visa limitations that many countries impose on Iraqis. Moreover, this ever increasing customer demand derived many travel agents and companies working in the tourism industry to keep up with the ICT developments and offer more efficient solutions including using global distribution systems (GDS) such as Sabre and computer reservation solutions (CRS) like Galileo for booking flights and accommodations for customers. Furthermore, payment solutions have also emerged as several airlines operators have started accepting debit/credit cards, Visa, and MasterCard while payment solutions companies and some banks started issuing travel cards.

ICT Development in the Tourism Sector in Iraq



- **Iraqi Airways:** is the national carrier of Iraq, it was founded in 1945 and its fleet consists of 28 planes and flies to around 40 domestic and international destinations. The airways provide customers with the option to book their flights through their offices and agents. In the recent years, Iraqi Airways have enabled their customers to book their flights online through the website and pay securely via credit/debit cards, Visa, and MasterCard.



- **Fly Baghdad Airlines:** is an Iraqi Airline that started operating in 2017. Its fleet consists of two Boeing 737-700, one Boeing 737-800, and one bombardier CRJ-200. The company has several domestic and international destinations including Ankara, Istanbul, Beirut, Minsk, and Erbil. Fly Baghdad enables passengers to book their flight tickets online and pay via Qi Card, Zain Cash, Asia Hawala, MasterCard, and Visa Card or through their available branches in Iraq and other countries.



- **Babylon Booking:** A B2B flight booking portal that combines more than 700 airlines including more than 150 low-cost carriers from multi-GDS, multi-suppliers, and third-party APIs. The company is owned by Moonline Travel and Trade and has branches in Iraq, Turkey, the UAE, and Germany.

The portal enables both IATA and non-IATA travel agencies to book and issue flight tickets in just a few clicks with a user-friendly interface and seamless billing. It also empowers travel agencies with ready solutions, tools, templates, in-depth reports and data, and continuous support.

Travel and Tourism Startups in Iraq



Bil Weekend: is a travel startup that was founded in 2016 and that aims to revive domestic tourism, and sheds the light on many cultural and natural sites and attractions in Iraq. The startup organizes local trips at the weekend, hence the name, to many touristic sites in Iraq such as Ur, Babylon, the marshes, Aqar Quf, Samarra, and others.



Sindibad: is an online flight reservations platform. It enables users to book their flights via their website or application and pay online via Zain Cash or sends an agent to collect the payment at the customers' location free of charge. This employed method tackles the issue of the lack of electronic payment means without depriving customers of the convenience of online booking.



Hili: is a startup that was launched in 2016. The project produces handmade accessories, artifacts, and souvenirs that are inspired by the culture and traditions of Iraq. Hili has also made it a part of its mission to empower women and marginalized groups by providing them with job opportunities.



Advenature: is a travel startup that was established in 2018 that organizes personal tours and activities that include hiking, climbing, snowboarding, camping, and many other activities, where the individuals are taken on an adventure to explore the beauty of nature and landscapes in Iraq.



Wen: is an Iraqi travel and tourism startup that was founded by few individuals in 2019. The startup aims to promote domestic tourism and bring attention to the hidden natural, cultural, and historical treasures of touristic sites in Iraq. Wen's team made it their mission to visit and explore those sites all over Iraq and share them with their audience through their Facebook page, the team has visited over 600 sites. Wen has also grown to organize domestic tours and trips to many sites across the country.



Safr: is a startup that offers a variety of tourism and travel services such as issuing visas to the UAE, Jordan, Oman, Egypt, Turkey, Thailand, and India. In addition to entry visas to Iraq for foreigners. Moreover, Safr provides flights reservations and touristic tours to many different countries.

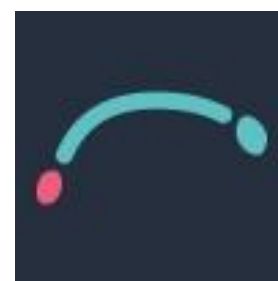
Travel and Tourism Startups in the MENA Region



SafarPass: is a platform for business travel that was founded in 2019, and is based in the UAE. The platform offers a large inventory of cost-effective travel bookings and corporate travel solutions, in addition to other tools to manage the budget and expenses for corporate travel. The startup has obtained an undisclosed amount of investment from Plug and Play Tech Center in 2019.



Mughamer: Arabic for an adventurer, is an online booking platform that was founded in 2020 and based in the UAE. The platform provides a variety of activities including hiking, kayaking, desert safari, surfing, horse riding, and others. The platform provides activities in around 15 countries including the UAE, KSA, Oman, Morocco, Egypt, Turkey, and many others.



Viajero: is a startup that was founded in 2019, in Cairo, Egypt. The startup operates in travel and tourism through an application. The users can book travel packages, tours, trips, and transportations.



HalaYalla: is a super app that was founded in 2012, and is based in KSA. HalaYalla provides an abundance of activities in tourism, sports, and entertainment. Users can book tours, adventures, sports classes, events, and many others through the platform. HalaYalla has over 1 million registered users and sold over 1.2 million tickets. HalaYalla provides different platforms such as Kafu Games for esports, Sharek for events, Agool social platform, Jazeel for influencers marketing, and few others. The platform also offers business-to-business solutions in event management and influencer marketing. Moreover, the platform provides a fun startup accelerator fund.



Visgo: is a startup that was founded in 2019 in Cairo, Egypt. It provides audio tour guides that are location-based and can be purchased by users. It also allows content creators to record audio guides and make a profit by publishing them. The startup has obtained \$15,900 in a pre-seed investment round from Falak Startups.

Conclusion and Recommendations

- The tourism sector in Iraq suffers from negligence, thus, concerned entities and stakeholders need to prioritize this sector to come up with a realistic framework to develop this sector.
- Domestic tourism is a more affordable alternative for many citizens. However, the popular destinations are often limited to the northern region of Iraq. Whereas many other potential destinations are disregarded.
- The Ministry of Culture, Tourism, and Antiquities should develop the infrastructure of tourist attractions, including guides, road signs, and nearby facilities like markets, restaurants in order to promote those attractions.
- Iraq has six sites listed under the World Heritage, with the right infrastructure development and promotion, they could evolve to be international destinations for foreigners.
- Developing the ICT infrastructure and the framework and legislation for e-tourism in order to lead the progress of the tourism sector and related industries.
- Providing the private sector and startups in travel and tourism with facilitations including the incentives and regulations facilitation needed to operate in this industry.
- The National Investment Commission should promote investment opportunities in the tourism, travel, and hospitality sectors.
- Conflict and violence have left many sites of historic and cultural importance for Iraq to be in desperate need of rehabilitation. Therefore, actions should be taken by the Iraqi authorities in partnership with the concerned international agencies, initiatives, and foundations in order to preserve the culture and heritage of Iraq and contribute further to the tourism sector.
- The hospitality sector contributes to the wellness of tourism and provides job opportunities and means of income. Hence, infrastructure development is needed in addition to regular checkups on the existing facilities to ensure their compliance with safety and hygiene measures.
- Iraq's outbound tourism expenditures are quite high compared to other countries in the Middle East, researching this phenomena further and understanding the reasons behind it could help in developing domestic tourism to attract those Iraqis.
- Religious tourism has the largest share of the tourism sector in Iraq. Hence, focusing on developing this sector would increase the revenues.
- Facilitating the visa process would bring investment into the country and attract both foreign tourists and Iraqis who reside abroad.
- Developing the vocational training and education in the tourism and hospitality sectors will enhance the capacity and the skills of the workforce in those sectors to match the demand and further contribute to the growth of the tourism industry.

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