

**ESD/CTM/SM**

**TOURISM DEVELOPMENT  
IN THE OIC COUNTRIES**

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# **TOURISM DEVELOPMENT IN THE OIC COUNTRIES**

## **SESRTCIC**

### **1. INTRODUCTION**

This concise paper is a critical attempt to look into the tourism sectors of the OIC countries. The objective of the paper is to identify the problem areas that are preventing cooperation among the OIC countries and to come up with ways and means to strengthen cooperation in this important field. To perform this task the paper examined the basic tourism data of the OIC countries and generated a set of indicators in the process. This set of indicators is then used to appraise the tourism performance of the OIC world with World tourism indicators. The remaining parts of the paper are structured in the following manner, Section 2 explains the theoretical concepts and describes the data and methods used in the paper. Section 3 investigates the OIC basic tourism facts and indicators and compares them with world indicators. In this regard, the paper concentrates only on tourist arrivals and receipts as the main indicators. It thus does not take into account capacity and size factors, such as number of beds, mainly due to time and data constraints. For the same reasons, it was not possible also to consider inter OIC tourism data in details. Section 4 explores the problems facing tourism in the OIC world, particularly those limiting cooperation amongst them. Section 5, is the policy section. It endorses the broad objectives and recommended actions of the OIC Plan of Action (POA). Finally it concludes with some practical suggestions and steps to activate and realize those goals so as to enhance inter OIC tourism activity.

### **2. GENERAL BACKGROUND**

#### **2.1. Conceptual Issues**

Tourism comprises the activities of persons travelling to and staying in places outside their permanent place of residence, for a period not more than a year, for leisure, business, and other purposes. In this sense, the term tourism covers both domestic and cross-boarder (International) tourism. Domestic tourism involves movement and travel of residents of a certain country within that country. Though vitally important for many

countries, domestic tourism is not considered in this paper for obvious reasons. International tourism, on the other hand, includes both inbound as well as out-bound tourism. Inbound tourism, refer to the travel of non-residents into a country, while outbound tourism is the reverse, with the residents of a certain country travelling across its boarder to other countries. Based on this definition, tourism industry includes all the socio-economic activities that are directly or indirectly involved in providing a service to tourists. These, *inter alia*, include the services of the following main sectors:

- Transportation services
- Hotels and lodging services
- Food and Beverage sector services
- Cultural and tourist attractions and entertainment
- Banking and financial services
- Promotion and Publicity

Equally important are the public services that deal directly with the tourists. Most notably amongst these are the following services

- the immigration control
- the consulate services
- tourist information and safety services

Historically, tourism was seen as mainly a cultural activity. The second half of the 20<sup>th</sup> century has witnessed the commercialization of tourism. In recent decades tourism has become a fully-fledged industry contributing significantly to the economic and social development of many countries in the world. Nowadays the tourism sector has been widely regarded as a major potential source of output, employment and foreign exchange. Indeed it is so for many countries, including some OIC members. Accordingly, most countries, including some OIC members, have focused their attention and effort towards developing their tourism sector and the tourist-related industries. Many OIC countries have achieved notable success in this regard. The OIC countries in the North of Africa and in the Mediterranean basin in general, viz., Morocco, Tunisia and Egypt, Turkey and Lebanon serve as typical example in this regard.

## **2.2. Data and Methodology**

International tourism and fare receipts and expenditure data is from the 'Compendium of Tourism Statistics of the World Tourism Organization the 19<sup>th</sup> and 20<sup>th</sup> editions. There was no data in the available sources on Guinea-Bissau, Kazakhstan, Mozambique, Palestine, Qatar, Somalia, and Tajikistan, and partial data was available for 17 other OIC countries. Since it is international tourism that is more significant, and is the subject matter of this conference, the paper is therefore restricted to the realm of international tourism. Accordingly, unless otherwise stated, a reference to tourism indicates international tourism.

A basic set of tourism indicators is provided in the following section including tourists International Arrivals (in number of visitors) and International Receipts, in millions of US dollars (Annexes I-IV). Annexes II and I include regional data and totals, on sizes, market shares, and annual percentage changes for the main tourist destinations and the other tourist destinations of the world for the period 1994-1999. They also show the percentage shares of the same variables for the OIC countries and compare them with those of the world. Tables 1 and 2 (in the text) abridge the main OIC information in annexes II and I.

The **Balance of International Tourism Payments (BOTP)** of each country is the sum of **Travel** and the **Fare Balances** of that country. The **Balance of International Travel (BOT)** is obtained by deducting each country's international tourism receipts from its international tourism expenditure. Similarly, the **Balance of Fares (BOF)** is obtained by deducting the international fare payments from international fare receipts of each country. The result of adding the two sub-balances begets the **BOTP** for each country. This figure is then related to the each respective country's **Gross National Product (GNP)** and to its **Export of Goods and Services (XGS)** total. The outcome of the GNP exercise is shown in annex III and that of the XGS is in annex IV.

## **3. BASIC TOURISM INDICATORS OF THE OIC WORLD**

### **3.1. Tourist Arrivals**

Over the period 1995-1999, the total volume of tourist arrivals worldwide increased by an annual average of 3 per cent. Individual

increases varied ranging between 5.6 in 1995 to 2.7 in 1998. Arrivals in the world's main tourist destinations (**WMD**) increased by 2.7 per cent annually, during the period, compared to 4.8 per cent for the world's other destinations (**WOD**). This is an indication to relatively rapid and expanding tourist development in the WOD in comparison with the popular WMD. However the relative share of the WOD group ranged between 12.5 to 13.6 per cent (Table 1.A).

The main tourist arrival destinations in the OIC world (**OIC-MD**) are Morocco and Tunisia in the North of Africa, Malaysia and Indonesia in East Asia, Turkey in Europe, Saudi Arabia, Egypt, UAE and Bahrain in the Middle East, and Iran and Pakistan in South Asia. This group receives between 75 to 80 per cent of the OIC's total arrivals but only between 7 to 7.5 per cent of the world's total volume of arrivals. In comparison to the worldwide volume of arrivals the OIC world appear to be losing some ground. In this regard, the relative shares of the OIC world dropped down from 6.3 per cent in 1995 to 5.6 per cent in 1999. During the period 1995-99, the OIC-MD arrivals increased by only 0.6 per cent on average compared to 4.8 per cent for the OIC-OD. This also indicates a relatively more rapid expansion in the OD compared to the MD. However, MD still took 78 per cent of the OIC totals on average. While the OD share increased significantly over the period, it suffered a sizable drop in 1999 (Table 1.A.).

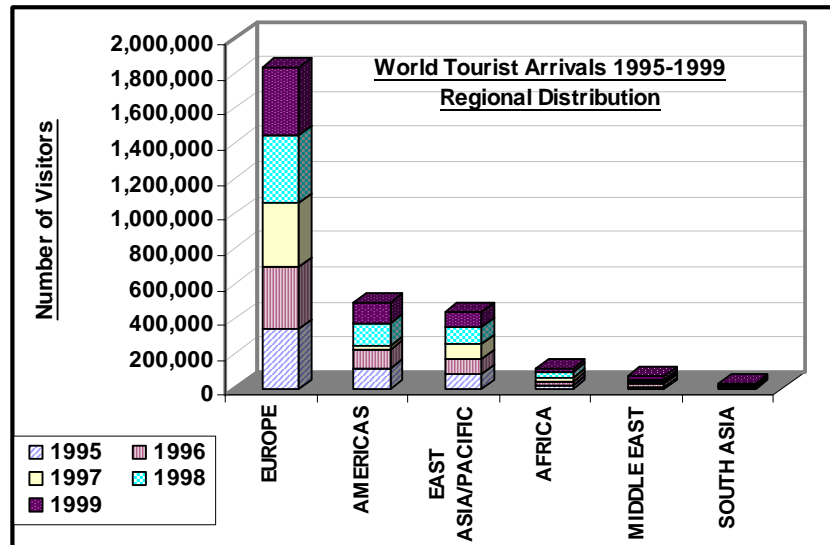
**TABLE 1.A.**  
**OIC COUNTRIES SHARES AND RATES OF CHANGE IN**  
**INTERNATIONAL TOURIST ARRIVALS 1995-1999 (%)**

|                 | MARKET SHARE(%) |      |      |      |      | ANNUAL CHANGE (%) |       |       |       |
|-----------------|-----------------|------|------|------|------|-------------------|-------|-------|-------|
|                 | 1995            | 1996 | 1997 | 1998 | 1999 | 96/95             | 97/96 | 98/97 | 99/98 |
| MD TOTALS       | 87.5            | 87.2 | 87.0 | 86.7 | 86.4 | 5.1               | 3.2   | 2.5   | 2.7   |
| of which OIC-MD | 6.3             | 5.7  | 5.8  | 5.6  | 5.6  | -4.1              | 5.1   | -0.7  | 3.0   |
| OIC-MD/MD (%)   | 7.2             | 6.5  | 6.7  | 6.5  | 6.5  |                   |       |       |       |
| OD TOTALS       | 12.5            | 12.8 | 13.0 | 13.3 | 13.6 | 8.9               | 5.1   | 4.5   | 6.0   |
| of which OIC-OD | 1.3             | 1.9  | 1.7  | 1.9  | 1.4  | 57.1              | -5.7  | 15.0  | -27.0 |
| OIC-OD/OD (%)   | 10.3            | 14.8 | 13.3 | 14.6 | 10.1 |                   |       |       |       |

Extract Appendix Table 1.1.

Note: Arrivals indicate the number of visits not persons even if a person makes many visits.

Graph 1



However, the regional share distribution of the OIC main destination vary widely with the middle east topping with about 70 per cent on average and non at all in the Americas. The first row of Table 1.B show the percentages of all OIC destination relative to world arrivals. The remainder of the table reflects the regional distribution of the OIC arrivals arranged in a descending order. This table also shows the annual rate of change of each region.<sup>1</sup> The OIC East Asia region received the highest number of visitors, followed by the OIC Europe, the Middle East, Africa and then South East Asia and with nothing in the Americas region. In Africa too the OIC market shares appear to be considerable and increasing (Graph 2).

<sup>1</sup> Statistical annex (I) is base for Tables 1A and 1B, 3A and 3B.

Graph 2

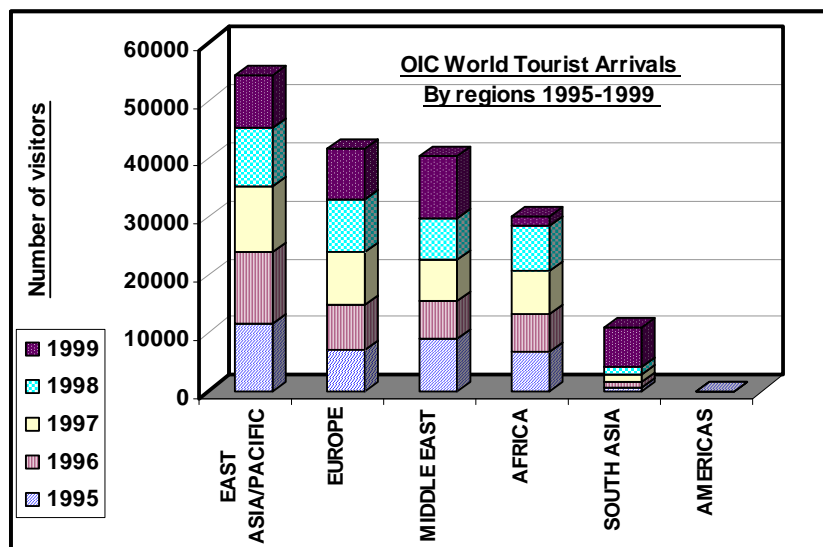


TABLE 1.B.  
SHARES OF OIC MAIN DESTINATIONS IN WORLD TOURIST ARRIVALS BY REGION

|                | MARKET SHARE(%) |      |      |      |      | ANNUAL CHANGE (%) |       |       |       |
|----------------|-----------------|------|------|------|------|-------------------|-------|-------|-------|
|                | 1995            | 1996 | 1997 | 1998 | 1999 | 96/95             | 97/96 | 98/97 | 99/98 |
| OIC/WORLD(%)   | 7.6             | 7.6  | 7.5  | 7.5  | 7.0  | 5.6               | 3.5   | 2.7   | 3.2   |
| MIDDLE.EAST    | 74.4            | 74.2 | 72.5 | 68.4 | 63.7 | -29.3             | 8.0   | 1.8   | 24.4  |
| AFRICA         | 33.1            | 30.0 | 31.3 | 31.8 | 32.4 | 47.3              | 50.4  | 49.4  | 49.8  |
| SOUTHASIA      | 19.8            | 21.1 | 23.1 | 27.7 | 26.7 | 12.8              | 19.1  | 28.9  | -0.1  |
| E.ASIA/PACIFIC | 14.5            | 13.7 | 12.9 | 11.7 | 11.5 | 3.2               | -6.4  | -10.9 | 6.2   |
| EUROPE         | 2.1             | 2.3  | 2.4  | 2.3  | 1.8  | 12.5              | 13.5  | -0.9  | -24.1 |
| AMERICAS       | --              | --   | --   | --   | --   | --                | --    | --    | --    |

Extract Annex I

### 3.2. Tourist Receipts

World receipts from tourism too has increased throughout the period 1995-1999 though not at a consistent rate. The average annual rate of increase for the period was 2.24 per cent. However, this entire rise in receipts was in 1996 season, while they declined in the following seasons through to 1999. Thus, the highest and single increase was in the 1996 season (7.1 per cent).

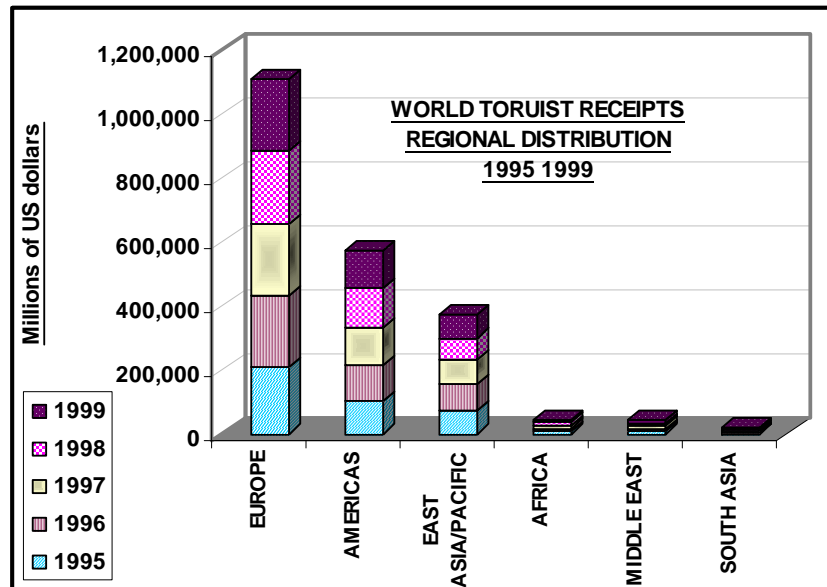
**TABLE 2.A**  
**SHARES OF OIC MAIN DESTINATIONS IN**  
**WORLD TOURIST RECEIPTS BY REGION**

|                 | MARKET SHARE(%) |      |      |      |      | ANNUAL CHANGE (%) |       |       |       |
|-----------------|-----------------|------|------|------|------|-------------------|-------|-------|-------|
|                 | 1995            | 1996 | 1997 | 1998 | 1999 | 96/95             | 97/96 | 98/97 | 99/98 |
| MD TOTALS       | 86.1            | 86.2 | 86.0 | 85.7 | 80.6 | 7.1               | 0.1   | 0.0   | -3.1  |
| of which OIC-MD | 5.0             | 5.5  | 5.5  | 4.9  | 4.6  | 18.3              | -0.7  | -9.8  | -2.2  |
| OIC-MD/MD (%)   | 5.8             | 6.4  | 6.3  | 5.7  | 5.8  |                   |       |       |       |
| OD TOTALS       | 13.9            | 13.8 | 14.0 | 14.3 | 13.7 | 8.9               | 5.1   | 4.5   | 6.0   |
| of which OIC-OD | 1.0             | 1.0  | 1.0  | 1.2  | 1.3  | 4.1               | 8.5   | 12.2  | 14.7  |
| OIC-OD/OD (%)   | 7.2             | 7.0  | 7.4  | 8.2  | 9.5  |                   |       |       |       |

Extract of Annex II.

Except for the last year, the share of the main tourist destinations in world tourism receipts averaged 85 per cent of total receipts during that period. Worldwide, the distribution of tourist receipts followed that of arrivals, but not in a proportionate manner. Europe took the lion's share of both, 61 and 51 per cent, with a higher share of arrivals than receipts. The America followed but with a higher share of receipts than arrivals. The same is true for East Asia, which suggest a higher receipt per visit for these two regions (Graph 3).

**Graph 3**





Unlike the world distribution, the OIC highest arrival and receipt shares were in East Asia with 31 and 37 per cent for arrivals and receipts. The OIC Europe (only Turkey) came second with 23.5 and 29 per cent respectively and here too the proportion of receipts surpass that of that of arrival. The Middle East, Africa and South Asia ranked in the next three positions with higher arrival than receipt rates. The fact that OIC Europe includes only Turkey is also very significant. It shows Turkey as the highest receiving single country among OIC group both in absolute volumes of visits and receipts (Graph 4).

The OIC-MD took about 80 per cent of the total OIC receipts leaving 20 per cent to OIC-OD. However, this amounts to only 5 per cent of the world's MD total receipts. Of the world's OD (13.5 per cent of the total), the OIC countries takes only 1 per cent. Thus of the world's overall tourism receipts the OIC world together receives about 7 per cent, which is about the same as its share in the world tourist arrivals.

**TABLE 2.B.**  
**OIC COUNTRIES SHARES AND RATES OF CHANGE IN**  
**INTERNATIONAL TOURIST RECEIPTS 1995-1999 (%)**

|                | MARKET SHARE(%) |      |      |      |      | ANNUAL CHANGE (%) |       |       |       |
|----------------|-----------------|------|------|------|------|-------------------|-------|-------|-------|
|                | 1995            | 1996 | 1997 | 1998 | 1999 | 96/95             | 97/96 | 98/97 | 99/98 |
| MIDDLE EAST    | 44.1            | 47.6 | 49.8 | 40.1 | 52.5 | 18.3              | 16.5  | - 3.6 | 34.7  |
| AFRICA         | 33.3            | 33.6 | 30.2 | 33.0 | 36.1 | 45.7              | 47.2  | 51.2  | 46.7  |
| SOUTH ASIA     | 8.7             | 9.9  | 10.4 | 12.3 | 11.4 | 28.3              | 13.8  | 21.4  | -8.8  |
| E.ASIA/PACIFIC | 12.3            | 13.1 | 10.6 | 9.6  | 10.0 | 17.7              | -25.4 | -19.0 | 15.4  |
| EUROPE         | 2.3             | 2.7  | 3.6  | 3.4  | 2.2  | 20.3              | 35.7  | -3.4  | -36.0 |
| AMERICAS       | --              | --   | --   | --   | --   | --                | --    | --    | --    |

Extract of annex II

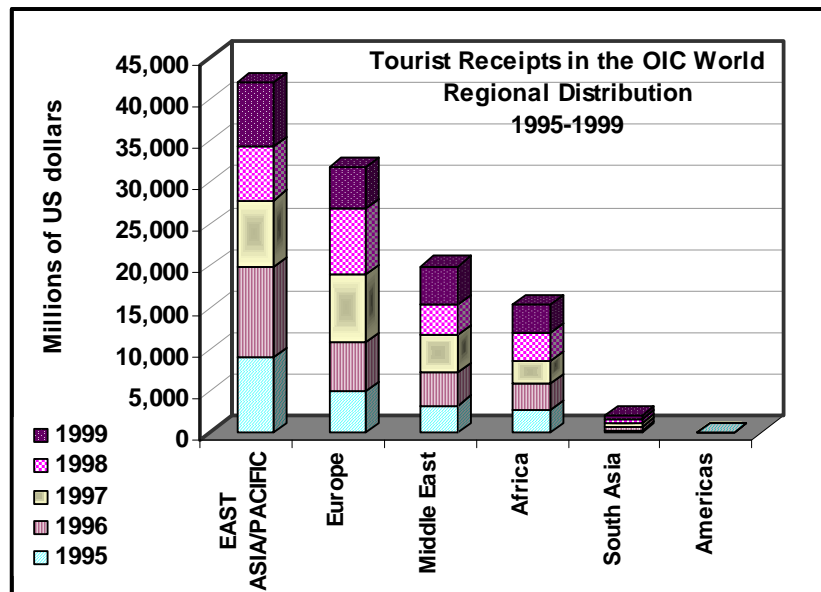
**TABLE 3.A.**  
**WORLD TOURIST ARRIVAL AND TOURIST RECEIPTS**  
**REGIONAL SHARES**

| 1995-1999 (Totals) | Arrivals (%) | Receipts (%) |
|--------------------|--------------|--------------|
| EUROPE             | 61.4         | 51.2         |
| AMERICAS           | 16.6         | 26.4         |
| EAST ASIA/PACIFIC  | 14.7         | 17.3         |
| AFRICA             | 4.0          | 2.1          |
| MIDDLE EAST        | 2.5          | 2.0          |
| SOUTH ASIA         | 0.8          | 0.9          |
|                    | 100.0        | 100.0        |

**TABLE 3.B.  
THE OIC WORLD TOURIST ARRIVAL AND TOURIST RECEIPTS:  
REGIONAL SHARES**

| 1995-1999 (Totals) | Arrivals (%) | Receipts (%) |
|--------------------|--------------|--------------|
| EAST ASIA/PACIFIC  | 30.6         | 37.6         |
| EUROPE             | 23.5         | 28.6         |
| MIDDLE EAST        | 22.8         | 18.0         |
| AFRICA             | 16.9         | 13.9         |
| SOUTH ASIA         | 6.2          | 1.9          |
| AMERICAS           | 0.0          | 0.0          |
|                    | 100.0        | 100.0        |

**Graph 4**



**TABLE 4**  
**ANNUAL AVERAGE CHANGE IN MAIN TOURISM INDICATORS**  
**TOTALS AND REGIONAL DISTRIBUTIONS**

|                        | AVERAGE CHANGE (%) P.A. |                  |
|------------------------|-------------------------|------------------|
|                        | Tourist Receipts        | Tourist Arrivals |
| WORLD TOTAL            | 2.2                     | 3.0              |
| AFRICA                 | 3.4                     | 6.0              |
| MD AFRICA              | 5.0                     | 1.3              |
| OIC-MD AFRICA          | 5.0                     | 5.6              |
| AMERICAS               | 2.8                     | 2.7              |
| MD AMERICAS            | 3.8                     | 2.4              |
| OIC-MD AMERICAS        |                         | 0.0              |
| EAST ASIA/PACIFIC      | 0.2                     | 2.9              |
| MD E.ASIA/PACIFIC      | -1.2                    | 2.8              |
| OIC-MD E.ASIA/PACIFIC  | -3.9                    | -1.8             |
| EUROPE                 | 1.2                     | 2.7              |
| MD EUROPE              | -0.1                    | 2.7              |
| OIC-MD EUROPE          | 0.2                     | -0.8             |
| MIDDLE EAST            | 3.5                     | 7.8              |
| MD MIDDLE EAST         | 7.2                     | 4.5              |
| OIC-MD MIDDLE EAST     | 7.2                     | -0.7             |
| SOUTH ASIA             | 4.4                     | 5.1              |
| MD SOUTH ASIA          | 4.4                     | 5.4              |
| OIC-MD SOUTH ASIA      | 10.1                    | 11.6             |
| MD TOTAL               | 0.9                     | 2.7              |
| OIC-MD TOTAL           | 0.7                     | 0.6              |
| OTHER DESTINATIONS     | 1.9                     | 4.8              |
| OIC OTHER DESTINATIONS | 7.8                     | 4.5              |

Calculation based on data in Annexes I and II

### **3.3. Net Balance of Tourism (BOTP)**

In this section, the paper calculates the BOTP of individual OIC countries. These are then related, as percentages, to the respective countries Gross National Products (GNP) and Exports of Good and Services (XGS). The results of the two exercises are then ranked and listed in a descending order (Annexes 3 and 4 respectively). The purpose of this exercise is to reflect the relative weight of Tourism to the individual OIC economies.

Table 5 ranks the OIC countries in descending order, into seven ranges, the highest of which include records of 50 per cent and over, and the lowest includes sub-zero records. Using this table, the OIC countries may be classed in five groups:

The first group includes countries with dominantly high BOTP both in relation to GNP and XGS and thus also very high contribution of the tourism sector in the economy. This group include only the Maldives in which Tourism is the main economic activity contributing over 70 and 54 per cent of the Maldives GNP and XGS respectively.

The second group includes countries with high and consistent share of tourism in the economy. The countries in this group have a relative BOTP exceeding 4 percent of GNP and or more than 10 per cent of XGS. The countries in this group include Tunisia, Lebanon, Comoros, Guyana, Bahrain, Jordan, Morocco, Syria and Turkey.

In the third group tourism play some role however, that role is either not consistent or not very significant compared to the size of the economy. The relative BOTP to GNP is between 0.1-3.9 and between 4 to 9 of XGS. It includes a range of countries including Egypt, Malaysia at one end and Turkmenistan at the higher end and Surname, Uzbekistan and Bahrain at the other end.

The BOTP in the forth group is either zero or negative and thus too its ratios to GNP and XGS. In this group tourism at best has a neutral effect but mostly a negative one on the balances of the economy. This group contains over a third of the OIC countries. The fifth is the no data group. The last two groups together make about 50 per cent of the OIC countries.

The following notes can be made following this exercise:

- The role of tourism in different countries is neither a function of the size nor the level of affluence of the country.
- So far only the countries with inherent (natural, historic etc.,) tourism potential, are generally the ones which tend to develop and extend their tourism industries.

- Tourism development is neglected in some resource rich as well as in most OIC poor countries. This is mainly due to the lack of cognizance in both but also to the lack of resources in the latter.
- Though a crucial factor, a natural resources potential alone can not make a successful tourism industry. That has to be coupled with insightful planning, public and social awareness, prudent and courteous management and sheer hard work.

**TABLE 5**  
**OIC COUNTRIES RANKED BY TOURISM WEIGHT**  
**(Based 1995-99 period averages)**

| <b>I. BOTP Relative to GNP (%)</b>  |  |
|-------------------------------------|--|
| 50 and over                         | Maldives (70.2 %)  |
| 25-49                               | --   |
| 10-24                               | --   |
| 4-9                                 | Tunisia, Lebanon, Comoros, Guyana, Bahrain, Jordan, Syria, Morocco   |
| 0.1-3.9                             | Gambia, Egypt, Turkey, Malaysia, Albania, Turkmenistan, Indonesia, Saudi Arabia, UAE, Sierra Leone, Senegal, Benin, Burkina Faso, Oman, Suriname, and Uzbekistan.                      |
| 0 and under                         | Algeria, Iran, Iraq, Kyrgyztan, Pakistan, Uganda, Sudan, Azerbaijan, Bangladesh, Mauritania, Yemen, Libya, Guinea, Cameroon, Djibouti, Niger, Togo, Mali, Chad, Nigeria, Gabon, Kuwait |
| No data                             | Afghanistan, Brunei, G. Bissau, Kazakhstan, Mozambique, Palestine, Qatar, Somalia, Tajikistan  |
| <b>II. BOTP Relative to XGS (%)</b> |  |
| 50 and over                         | Maldives (53.8 %)  |
| 25-49                               | --   |
| 10-24                               | Comoros, Lebanon, Tunisia, Morocco, Syria, Turkey  |
| 4-9                                 | Egypt, Turkmenistan, Suriname, Guyana, Albania, Jordan, Indonesia, Gambia, Sierra Leone, Bahrain   |
| 0.1- 3.9                            | Burkina Faso, Saudi Arabia, Senegal, Malaysia, Benin, UAE, Brunei, Iraq, Oman, Uzbekistan, Algeria,  |
| 0 and under                         | Kyrgyztan, Iran, Yemen, Azerbaijan, Mauritania, Guinea, Pakistan, Djibouti, Libya, Sudan, Uganda, Bangladesh, Cameroon, Gabon, Niger, Mali, Nigeria, Chad, Kuwait, Togo                |
| No data                             | Afghanistan, G. Bissau, Kazakhstan, Mozambique, Palestine, Qatar, Somalia, Tajikistan  |

Based on Annexes III and IV

#### **4. PROBLEM FACING TOURISM AND TOURISM COOPERATION IN THE OIC WORLD**

The problems facing the tourism sector in the OIC countries are diverse depending on the extent of development of the sector in the different countries. The paper divides these problems into two broad categories:

1. **Development-related Problems:** these include the problems hampering the development of tourism and tourism sector in OIC countries.
2. **Operation-related Problems:** These include the set of problems facing countries, which already have developed tourism Industries.

##### **4.1. Problems of Development**

###### **□ *Lack of awareness, knowledge and know how***

Presumably, no country in the OIC world is still in the dark regarding the cultural value of tourism. However, in many OIC countries there is still a fundamental lack of basic cognizance as to the economic importance of tourism as an industry. This is true both for its positive impact as potential source of employment, export and foreign exchange, or its negative impact as a possible leakage of countries' own resources.

###### **□ *Lack of technical know-how and limited cultural orientation***

Even when that fundamental awareness is there, there is generally the lack of knowledge and know how as to where to make a start? And how? Tourism as a modern industry is recent in the world. A part from the OIC countries in which there has been history tourism as a life style and way of life, tourism is also new and unfamiliar activity in most OIC countries. So, both for the authorities as well as for the people in general, dealing with mass influx of people is an unfamiliar territory. As a result, tourist's services tend to be very basic and lacking.

###### **□ *Deficiency of Tourism infrastructures***

Most OIC countries lack the infrastructures necessary for the development of successful tourism sectors. Primarily, amongst these, are

hotels and lodging services, transportation, safety, and security and tourist information services.

□ ***Absence and lack of Finance***

While investment in services is a well-established activity in the developed world, it is still lagging behind in the developing world. Service investment projects in the developing world, and in tourism in particular, are often regarded as high-risk projects, among the investment community. This is particularly the case in areas that lack the basic infrastructures needed for the provision of such services. Accordingly, it is almost impossible for the OIC countries in this category to get access to reasonable financing, if any at all, for such projects. Thus, even when countries manage to tackle the problems of project identification and planning, the hurdle of finance subdues their plans.

□ ***Weak promotional activity***

Another problem behind the lack of development in tourism relates to the absence of publicity promotion and mass media exposure for the limited services available.

#### **4.2. Problems of Operations**

Some of the developmental factors above are also relevant as operational factors, while all the operational factors are relevant for the countries still in the initiation phases of the industry. These, *inter alia*, include the following:

□ ***Instability and Deficiency of demand***

The demand curves facing existing services in many OIC countries are unstable and erratic. Since they are externally based they are easily swayed by many factors. This fluctuating and erratic nature of demand is the prime cause of concern among the main tourist destinations in the OIC world. While these countries can not influence the demand per se, they nevertheless may be able to use forecasting techniques and forward planning to determine the levels of service to suite expected levels of demand.

□ ***Safety-related problems***

The safety of the tourists is among the primary factors for any successful tourism industry and thus should be one of the basic objectives of tourism planning and provisions. Safety-related problems whether real or perceived exert negative impacts on the reputation of host places. In this regard, negative perceptions appear to play a detrimental role on the prospects of tourism in many OIC countries. Even such factors as rumors may cause havoc on complete tourist seasons.

**5. POLICY RECOMMENDATIONS AND ACTIONS FOR CHANGE AND COOPERATION**

The approach to resolving these and other problems requires the adoption of long-term strategies as well as medium to short-term plans, at the national as well as the regional and international levels.

**5.1. At the National Level**

***A. Long-term strategies***

Some of the important elements of the strategy are:

- ◆ To promote and develop tourism as a modern industry to meet the growing demand for new and quality services, eco-tourism is a case in point in this regard. This is to be done by developing new resources and facilities as well as raising awareness about the existing resources and facilities.
- ◆ To raise education standards in general and tourism education and orientation in particular. This will help change peoples old and dated perceptions regarding tourism. It also raises the people's awareness of the opportunities and challenges involved in tourism. Education programs should be designed in such a way so as to boost the positive elements of tourism and to counter its negative impacts. Social positive attitudes, such as friendliness, helpfulness and honesty against negative ones as tourist harassment, fraud and crooked behavior are material factors, which help create long-term perceptions, and thus influence the popularity and reputation of tourist destinations.



- ◆ To cooperate and benefit from the opportunities available to countries from regional as well international institution. In this regard, the IFC of the World Bank has developed a special program for the tourism development. OIC Countries should make use of these resources and others to help identify, plan and fund tourism projects.
- ◆ To make efficient use of the mass media and promotional activity to publicize and promote existing attractions and the available services. Promotion is also vital in achieving all other tourism objectives.
- ◆ To enhance the atmosphere of harmony, stability, and cooperation among the OIC countries.
- ◆ To encourage and promote extensive private sector involvement in tourism through establishing joint venture particularly in the areas of capacity building and in enhancing and improving the quality of services in the sector.

***B. Medium term to short term strategy***

Some of the important elements of the strategy are:

- ◆ To endeavor to establish an atmosphere that raises confidence and encourages private sector investment, and its participation in managing the sector affairs.
- ◆ To improve the basic infrastructure of the country such as roads, public amenities, and transport with the purpose of developing tourism and the supporting activities.
- ◆ To create a safe and secure environment by establishing law and order and by putting into place the institutions and institutional set up that maintains social and societal peace.
- ◆ To improve the quality and the efficiency of tourist services. In this regard, the relevant authorities need to be trained and supported to provide world class services to visitors and tourists. These include information, immigration and visa, and police services. It should also

put into place the necessary laws and regulations, which control the quality of the services, provided by the private sector to tourists.

- ◆ Technical training: Emphasis to be placed on technical education both formally and informally. To provide technical training on different aspects of tourism. That should be offered particularly to the people and personnel engaged directly in the sector activities.
- ◆ To improve banking and financial services which facilitates the transfer of money. In this regard, a safe, easy and competitive system of money transfer is among the main factors of a successful tourism industry. Therefore, the existence of developed banking and financial system is prerequisite for attracting investment in general and for tourism in particular.

## **5.2. Action for cooperation at the OIC level**

The broad objectives and the cooperation programs offered in the OIC POA provide a viable framework for Inter OIC cooperation in this field. However, as these are general frameworks, they need to be supplement with practical actions and details. The last section in the paper will include some suggestions in that direction. The other two section list the objectives and programs of the POA for the development tourism and tourism cooperation among the OIC member countries.

### **A. Objectives**

1. To promote and develop tourism in the OIC countries, as an important means to demonstrate the inherent qualities, as well as, the true nature of the Islamic civilization and culture, to the rest of the world.
2. Support and develop joint action, at bilateral and multilateral levels, to strengthen, promote and expand tourist activities among the member countries, and in Islamic world in general.
3. Formulate co-ordinate OIC action addressed to the improvement and enhancement of supply in the area of tourism, through the establishment of new facilities and activities in the member

countries, in order to attain globally competitive standards in terms of facilities, quality of services and diversity of tourism activities.

4. Develop modalities of cooperation and co-ordination to facilitate the transfer of up-to-date technology into the tourism sector in the member countries in a manner that would facilitate its smooth assimilation, without harming the historical and cultural authenticity and tradition nor doing damage to the environment.
5. Encourage and promote extensive private sector involvement and cooperation in tourism, through joint venture, in the area of improvement and enhancement of physical capacities and quality service.

#### **B. Programs of Action**

1. Increasing the public awareness in the OIC countries about the exiting tourist resources and facilities in the Islamic world with a view to encouraging tourist visits to other Islamic countries by providing full information to potential visitors.
2. Establishment of direct contacts among the relevant parties concerned with tourism in the member countries in support of an expanded tourist activity among the member countries.
3. Creation of the appropriate legal, institutional and administrative conditions and environment in the member countries in support of an expanded tourist activity among the member countries.
4. Encouraging and facilitating joint tourism ventures and other investments in the member countries by the private sector in the expansion and upgrading of the existing tourist capacities and activities and for the construction of new facilities of appropriate quality and service standards, using up-to-date technologies.
5. Encourage and support the activities relating to the development of the necessary human capital in the area of tourism to ensure the availability of managerial and service personnel of international standards.

### **5.3. Practical steps towards promoting inter OIC tourism**

Some practical modalities are needed in order to put the ideas of the POA into effect. Through strengthened OIC cooperation, the broad objectives of the POA can be translated into realistic policies. The paper wishes to make the following directions and suggestions in this regard:

1. Successful cooperation can not be built on good intentions alone. Material mutual benefits are key factors to the success of any cooperation. In the tourism field this depends on factors such the ones mentioned throughout this paper. However, the paper single out quality of service, value for money or cost effectiveness, ease of travel as the most important amongst these factors.
2. Experience has shown that state subsidies of any sector tend to promote the wrong type of investment, which when left to their own devices either fail or provide the wrong type and low quality of service.
3. To overcome the hurdles of finance, technology and expertise, countries should make use of all available international assistance programs in this field such as the World Bank-IFC program.
4. Efforts should be made on bilateral as well as the multilateral levels to promote existing as well as new touristic opportunities of individual countries in other member countries with the purpose of increasing number of visitors from member countries.
5. Member countries should endeavor to ease entry and movement of visitors particularly from member countries. To do so visa, immigration and other travel requirement need to be simplified. The ultimate objective should be to create a boarder free Islamic world. Such plan would be in harmony with the Islamic free trade area and the Islamic common market plans.

In conclusion, despite the modest share of the OIC in world tourism, there is a wide scope for development and intra OIC cooperation in this field. Setting up practical schemes to implement the POA recommendations is the way forward in this regard.

**ANNEX I**  
**INTERNATIONAL TOURIST ARRIVALS, BY MAIN DESTINATIONS**

|                          | Tourist arrivals (thousands) |        |        |        |        | Market share(%) |      |      |      |      | Annual change (%) |       |       |       |
|--------------------------|------------------------------|--------|--------|--------|--------|-----------------|------|------|------|------|-------------------|-------|-------|-------|
|                          | 1995                         | 1996   | 1997   | 1998   | 1999   | 1995            | 1996 | 1997 | 1998 | 1999 | 96/95             | 97/96 | 98/97 | 99/98 |
| <b>WORLD TOTAL</b>       | 567381                       | 599035 | 619718 | 636676 | 656933 | 100             | 100  | 100  | 100  | 100  | 5.6               | 3.5   | 2.7   | 3.2   |
| <b>AFRICA</b>            | 20327                        | 21930  | 23419  | 25023  | 27263  | 3.6             | 3.7  | 3.8  | 3.9  | 4.2  | 7.9               | 6.8   | 6.8   | 9.0   |
| South Africa             | 4488                         | 4944   | 5653   | 5898   | 2421   | 22.1            | 22.5 | 24.1 | 23.6 | -    | 10.2              | 14.3  | 4.3   | 3.2   |
| Tunisia                  | 4120                         | 3885   | 4263   | 4718   | 4880   | 20.3            | 17.7 | 18.2 | 18.9 | 17.9 | -5.7              | 9.7   | 10.7  | 3.4   |
| Morocco                  | 2602                         | 2693   | 3072   | 3243   | 3950   | 12.8            | 12.3 | 13.1 | 13.0 | 14.5 | 3.5               | 14.1  | 5.6   | 21.8  |
| Zimbabwe                 | 1539                         | 1746   | 1495   | 1984   | 2328   | 7.6             | 8.0  | 6.4  | 7.9  | 8.5  | 13.5              | -14.4 | 32.7  | 17.3  |
| <i>sub-total</i>         | 12749                        | 13268  | 14483  | 15843  | 13579  | 62.7            | 60.5 | 61.8 | 63.3 | 63.3 | 4.1               | 9.2   | 9.4   | 8.8   |
| <i>OIC share</i>         | 6722                         | 6578   | 7335   | 7961   | 8830   | 33.1            | 30.0 | 31.3 | 31.8 | 32.4 | 47.3              | 50.4  | 49.4  | 49.8  |
| <b>AMERICAS</b>          | 110689                       | 116700 | 18334  | 122027 | 126709 | 19.5            | 19.5 | 19.1 | 19.2 | 19.3 | 5.4               | 1.4   | 3.1   | 3.8   |
| USA                      | 43318                        | 46489  | 47752  | 46395  | 46983  | 39.1            | 39.8 | 40.4 | 38.0 | 37.1 | 7.3               | 2.7   | -2.8  | 1.3   |
| Mexico                   | 20241                        | 21405  | 19351  | 19810  | 20216  | 18.3            | 18.3 | 16.4 | 16.2 | 16.0 | 5.8               | -9.6  | 2.4   | 2.0   |
| Canada                   | 16932                        | 17285  | 17636  | 18837  | 19556  | 15.3            | 14.8 | 14.9 | 15.4 | 15.4 | 2.1               | 2.0   | 6.8   | 3.8   |
| Argentina                | 4101                         | 4286   | 4540   | 4860   | 5970   | 3.7             | 3.7  | 3.8  | 4.0  | 4.7  | 4.5               | 5.9   | 7.0   | 22.8  |
| Brazil                   | 1991                         | 2666   | 2850   | 4818   | 5059   | 1.8             | 2.3  | 2.4  | 3.9  | 4.0  | 33.9              | 6.9   | -     | 5.0   |
| Puerto Rico              | 3131                         | 3065   | 3242   | 3396   | 3042   | 2.8             | 2.6  | 2.7  | 2.8  | 2.4  | -2.1              | 5.8   | 4.8   | -10.4 |
| <i>sub-total</i>         | 89714                        | 95196  | 95371  | 98116  | 100826 | 81.1            | 81.6 | 80.6 | 80.4 | 79.6 | 6.1               | 0.2   | 2.9   | 2.8   |
| <i>OIC share</i>         | --                           | --     | --     | --     | --     | --              | --   | --   | --   | --   | --                | --    | --    | --    |
| <b>EAST ASIA/PACIFIC</b> | 81355                        | 89037  | 88254  | 87183  | 93679  | 14.3            | 14.9 | 14.2 | 13.7 | 14.3 | 9.4               | -0.9  | -1.2  | 7.5   |
| China 1                  | 20134                        | 22765  | 23770  | 25073  | 27047  | 24.6            | 25.6 | 26.9 | 28.8 | 28.9 | 13.6              | 4.4   | 5.5   | 7.9   |
| Hong Kong                | 10200                        | 11703  | 10406  | 9575   | 10433  | 12.5            | 13.1 | 11.8 | 11.0 | 11.1 | 14.7              | -11.1 | -8.0  | 9.0   |
| Thailand                 | 6952                         | 7244   | 7294   | 7843   | 8280   | 8.5             | 8.1  | 8.3  | 9.0  | 8.8  | 4.2               | 0.7   | 7.5   | 5.6   |
| Singapore                | 6422                         | 6608   | 6531   | 5631   | 6258   | 7.9             | 7.4  | 7.4  | 6.5  | 6.7  | 2.9               | -1.2  | -13.8 | 11.1  |
| Malaysia                 | 7469                         | 7138   | 6211   | 5551   | 6000   | 9.2             | 8.0  | 7.0  | 6.4  | 6.4  | -4.4              | -13.0 | -10.6 | 8.1   |
| Indonesia                | 4324                         | 5034   | 5185   | 4606   | 4787   | 5.3             | 5.7  | 5.9  | 5.3  | 5.1  | 16.4              | 3.0   | -11.2 | 3.9   |

|  |                  |               |               |               |               |               |             |             |             |             |             |             |             |              |              |
|--|------------------|---------------|---------------|---------------|---------------|---------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|--------------|
|  | S. Korea         | 3753          | 3684          | 3908          | 4250          | 4660          | 4.6         | 4.1         | 4.4         | 4.9         | 5.0         | -1.8        | 6.1         | 8.8          | 9.6          |
|  | Australia        | 3726          | 4165          | 4318          | 4167          | 4326          | 4.6         | 4.7         | 4.9         | 4.8         | 4.6         | 11.8        | 3.7         | -3.5         | 3.8          |
|  | Japan            | 3345          | 3837          | 4218          | 4106          | 4500          | 4.1         | 4.3         | 4.8         | 4.7         | 4.8         | 14.7        | 9.9         | -2.7         | 9.6          |
|  | Macao            | 4202          | 4690          | 3836          | 4044          | 4246          | 5.2         | 5.3         | 4.3         | 4.6         | 4.5         | 11.6        | -18.2       | 5.4          | 5.0          |
|  | <i>sub-total</i> | <i>70427</i>  | <i>76868</i>  | <i>75677</i>  | <i>74846</i>  | <i>80713</i>  | <i>86.6</i> | <i>86.3</i> | <i>85.7</i> | <i>85.8</i> | <i>86.2</i> | <i>9.1</i>  | <i>-1.5</i> | <i>-1.1</i>  | <i>7.8</i>   |
|  | <i>OIC share</i> | <i>11793</i>  | <i>12172</i>  | <i>11396</i>  | <i>10157</i>  | <i>10787</i>  | <i>14.5</i> | <i>13.7</i> | <i>12.9</i> | <i>11.7</i> | <i>11.5</i> | <i>3.2</i>  | <i>-6.4</i> | <i>-10.9</i> | <i>6.2</i>   |
|  | EUROPE           | 338454        | 353700        | 370616        | 381939        | 385910        | 59.7        | 59.0        | 59.8        | 60.0        | 58.7        | 4.5         | 4.8         | 3.1          | 1.0          |
|  | France           | 60033         | 62406         | 67310         | 70000         | 71400         | 17.7        | 17.6        | 18.2        | 18.2        | 18.5        | 4.0         | 7.9         | 4.0          | 2.0          |
|  | Spain            | 38803         | 40541         | 43252         | 47749         | 51958         | 11.5        | 11.5        | 11.7        | 12.5        | 13.5        | 4.5         | 6.7         | 10.4         | 8.8          |
|  | Italy            | 31052         | 32853         | 34087         | 34829         | 35839         | 9.2         | 9.3         | 9.2         | 9.1         | 9.3         | 5.8         | 3.8         | 2.2          | 2.9          |
|  | UK               | 23537         | 25163         | 25515         | 25745         | 25740         | 7.0         | 7.1         | 6.9         | 6.7         | 6.7         | 6.9         | 1.4         | 0.9          | 0.0          |
|  | Poland           | 19215         | 19410         | 19520         | 18780         | 17940         | 5.7         | 5.5         | 5.3         | 4.9         | 4.6         | 1.0         | 0.6         | -3.8         | -4.5         |
|  | Austria          | 17173         | 17090         | 16647         | 17352         | 17630         | 5.1         | 4.8         | 4.5         | 4.5         | 4.6         | -0.5        | -2.6        | 4.2          | 1.6          |
|  | Germany          | 14847         | 15205         | 15837         | 16511         | 17093         | 4.4         | 4.3         | 4.3         | 4.3         | 4.4         | 2.4         | 4.2         | 4.3          | 3.5          |
|  | Czech Rep.       | 16500         | 17000         | 16830         | 16325         | 16031         | 4.9         | 4.8         | 4.5         | 4.3         | 4.2         | 3.0         | -1.0        | -3.0         | -1.8         |
|  | Russia           | 9262          | 14587         | 15350         | 15805         | 16421         | 2.7         | 4.1         | 4.1         | 4.1         | 4.3         | 57.5        | 5.2         | 3.0          | 3.9          |
|  | Hungary          | 20690         | 20674         | 17248         | 15000         | 12930         | 6.1         | 5.8         | 4.7         | 3.9         | 3.4         | -0.1        | -16.6       | -13.0        | -13.8        |
|  | Portugal         | 9511          | 9730          | 10172         | 11295         | 11600         | 2.8         | 2.8         | 2.7         | 3.0         | 3.0         | 2.3         | 4.5         | 11.0         | 2.7          |
|  | Greece           | 10130         | 9233          | 10070         | 10916         | 11462         | 3.0         | 2.6         | 2.7         | 2.9         | 3.0         | -8.9        | 9.1         | 8.4          | 5.0          |
|  | Switzerland      | 11500         | 10600         | 10600         | 10900         | 10800         | 3.4         | 3.0         | 2.9         | 2.9         | 2.8         | -7.8        | 0.0         | 2.8          | -0.9         |
|  | Netherlands      | 6574          | 6580          | 7834          | 9320          | 9817          | 1.9         | 1.9         | 2.1         | 2.4         | 2.5         | 0.1         | 19.1        | 19.0         | 5.3          |
|  | Turkey           | 7083          | 7966          | 9040          | 8960          | 6800          | 2.1         | 2.3         | 2.4         | 2.3         | 1.8         | 12.5        | 13.5        | -0.9         | -24.1        |
|  | Ukraine          | 3716          | 3854          | 7658          | 6208          | -             | 1.1         | 1.1         | 2.1         | 1.6         | -           | 3.7         | 98.7        | -18.9        | -            |
|  | Belgium          | 5560          | 5829          | 6037          | 6179          | 4717          | 1.6         | 1.6         | 1.6         | 1.6         | -           | 4.8         | 3.6         | 2.4          | -2.5         |
|  | Ireland          | 4821          | 5282          | 5587          | 6064          | 6511          | 1.4         | 1.5         | 1.5         | 1.6         | 1.7         | 9.6         | 5.8         | 8.5          | 7.4          |
|  | Croatia          | 1324          | 2649          | 3834          | 4112          | 3400          | 0.4         | 0.7         | 1.0         | 1.1         | 0.9         | 100.1       | 44.7        | 7.3          | -17.3        |
|  | <i>sub-total</i> | <i>311331</i> | <i>326652</i> | <i>342428</i> | <i>352050</i> | <i>355420</i> | <i>92.0</i> | <i>92.4</i> | <i>92.4</i> | <i>92.2</i> | <i>92.1</i> | <i>4.9</i>  | <i>4.8</i>  | <i>2.8</i>   | <i>1.0</i>   |
|  | <i>OIC share</i> | <i>7083</i>   | <i>7966</i>   | <i>9040</i>   | <i>8960</i>   | <i>6800</i>   | <i>2.1</i>  | <i>2.3</i>  | <i>2.4</i>  | <i>2.3</i>  | <i>1.8</i>  | <i>12.5</i> | <i>13.5</i> | <i>-0.9</i>  | <i>-24.1</i> |
|  | MIDDLE EAST      | 12356         | 13234         | 14261         | 15314         | 17992         | 2.2         | 2.2         | 2.3         | 2.4         | 2.7         | 7.1         | 7.8         | 7.4          | 17.5         |
|  | Saudi Arabia     | 3325          | 3325          | 3325          | 3325          | 3325          | 26.9        | 25.1        | 23.3        | 21.7        | 18.5        | -           | -           | -            | -            |

|  |                                 |        |        |        |        |         |      |      |      |      |      |       |      |       |       |
|--|---------------------------------|--------|--------|--------|--------|---------|------|------|------|------|------|-------|------|-------|-------|
|  | Egypt                           | 2872   | 3528   | 3657   | 3213   | 4489    | 23.2 | 26.7 | 25.6 | 21.0 | 24.9 | 22.8  | 3.7  | -12.1 | 39.7  |
|  | UAE                             | 1601   | 1768   | 1792   | 2184   | 1988    | 13.0 | 13.4 | 12.6 | 14.3 | 11.0 | 10.4  | 1.4  | 21.9  | -9.0  |
|  | Bahrain                         | 1396   | 1201   | 1571   | 1750   | 1661    | 11.3 | 9.1  | 11.0 | 11.4 | 9.2  | -14.0 | 30.8 | 11.4  | -5.1  |
|  | <i>sub-total</i>                | 9194   | 9822   | 10345  | 10472  | 11462.5 | 74.4 | 74.2 | 72.5 | 68.4 | 63.7 | -     | 8.0  | 1.8   | 24.4  |
|  | <i>OIC share</i>                | 9194   | 6497   | 7020   | 7147   | 8893    | 74.4 | 74.2 | 72.5 | 68.4 | 63.7 | -29.3 | 8.0  | 1.8   | 24.4  |
|  | SOUTH ASIA                      | 4200   | 4434   | 4834   | 5190   | 5380    | 0.7  | 0.7  | 0.8  | 0.8  | 0.8  | 5.6   | 9.0  | 7.4   | 3.7   |
|  | India                           | 2124   | 2288   | 2374   | 2359   | 2384    | 50.6 | 51.6 | 49.1 | 45.5 | 44.3 | 7.7   | 3.8  | -0.6  | 1.1   |
|  | Iran                            | 452    | 567    | 740    | 1008   | 1000    | 10.8 | 12.8 | 15.3 | 19.4 | 18.6 | 25.4  | 30.5 | 36.2  | -     |
|  | Nepal                           | 363    | 394    | 422    | 435    | 400     | 8.6  | 8.9  | 8.7  | 8.4  | 7.4  | 8.5   | 7.1  | 3.1   | -     |
|  | Pakistan                        | 378    | 369    | 375    | 429    | 436     | 9.0  | 8.3  | 7.8  | 8.3  | 8.1  | -2.4  | 1.6  | 14.4  | 1.6   |
|  | <i>sub-total</i>                | 3317   | 3618   | 3911   | 4231   | 4316    | 79.0 | 81.6 | 80.9 | 81.5 | 80.2 | 9.1   | 8.1  | 8.2   | 2.0   |
|  | <i>OIC share</i>                | 830    | 936    | 1115   | 1437   | 1436    | 19.8 | 21.1 | 23.1 | 27.7 | 26.7 | 12.8  | 19.1 | 28.9  | -0.1  |
|  | Main tourist destinations total | 496732 | 522099 | 538890 | 552233 | 567413  | 87.5 | 87.2 | 87.0 | 86.7 | 86.4 | 5.1   | 3.2  | 2.5   | 2.7   |
|  | <i>Of which OIC share</i>       | 35622  | 34149  | 35906  | 35662  | 36746   | 6.3  | 5.7  | 5.8  | 5.6  | 5.6  | -4.1  | 5.1  | -0.7  | 3.0   |
|  | %                               | 7.2    | 6.5    | 6.7    | 6.5    | 6.5     |      |      |      |      |      |       |      |       |       |
|  | Other Tourist Destinations      | 70649  | 76936  | 80828  | 84443  | 89520   | 12.5 | 12.8 | 13.0 | 13.3 | 13.6 | 8.9   | 5.1  | 4.5   | 6.0   |
|  | <i>Of which OIC share</i>       | 7242   | 11376  | 10724  | 12331  | 9007    | 10.3 | 14.8 | 13.3 | 14.6 | 10.1 | 57.1  | -5.7 | 15.0  | -27.0 |
|  | %                               | 10.3   | 14.8   | 13.3   | 14.6   | 10.1    |      |      |      |      |      |       |      |       |       |

Source: World Tourism Organization, Compendium of Tourism Statistics 1994-1998 and 1993-1997

**ANNEX II**  
**INTERNATIONAL TOURIST RECEIPTS, BY MAIN TOURIST DESTINATIONS**

|                          | Tourist receipts (US\$ millions) |        |        |        |        | Market share(%) |      |      |      |      | Annual change (%) |       |       |       |
|--------------------------|----------------------------------|--------|--------|--------|--------|-----------------|------|------|------|------|-------------------|-------|-------|-------|
|                          | 1995                             | 1996   | 1997   | 1998   | 1999   | 1995            | 1996 | 1997 | 1998 | 1999 | 96/95             | 97/96 | 98/97 | 99/98 |
| <b>WORLD TOTAL</b>       | 407317                           | 437938 | 439896 | 441255 | 455000 | 100             | 100  | 100  | 100  | 100  | 7.5               | 0.4   | 0.3   | 3.1   |
| <b>AFRICA</b>            | 8114                             | 9293   | 9467   | 10011  | 9590   | 2.0             | 2.1  | 2.2  | 2.3  | 2.1  | 14.5              | 1.9   | 5.7   | -4.2  |
| South Africa             | 2125                             | 2575   | 2769   | 2738   | 2754   | 26.2            | 27.7 | 29.2 | 27.3 | 28.7 | 21.2              | 7.0   | -1.1  | 0.6   |
| Morocco                  | 1304                             | 1674   | 1449   | 1745   | 1850   | 16.1            | 18.0 | 15.3 | 17.4 | 19.3 | 28.4              | -13.4 | 20.4  | 6.0   |
| Tunisia                  | 1402                             | 1451   | 1414   | 1557   | 1608   | 17.3            | 15.6 | 14.9 | 15.6 | 16.8 | 3.5               | -2.5  | 10.1  | 3.3   |
| Zimbabwe                 | 154                              | 219    | 230    | 158    | 145    | 1.9             | 2.4  | 2.4  | 1.6  | 1.5  | 42.2              | 5.0   | -31.3 | -8.2  |
| <i>sub-total</i>         | 4985                             | 5919   | 5862   | 6198   | 6356.5 | 61.4            | 63.7 | 61.9 | 61.9 | 66.3 | 18.7              | -1.0  | 7.0   | 2.6   |
| <i>OIC share</i>         | 2706                             | 3125   | 2863   | 3302   | 3458   | 33.3            | 33.6 | 30.2 | 33.0 | 36.1 | 45.7              | 47.2  | 51.2  | 46.7  |
| <b>AMERICAS</b>          | 102614                           | 112605 | 119298 | 120697 | 117533 | 2.2             | 25.7 | 27.1 | 27.4 | 25.8 | 9.7               | 5.9   | 1.2   | -2.6  |
| USA                      | 63395                            | 69751  | 73301  | 71250  | 73000  | 61.8            | 61.9 | 61.4 | 59.0 | 62.1 | 10.0              | 5.1   | -2.8  | 2.5   |
| Canada                   | 7882                             | 8616   | 8828   | 9393   | 10282  | 7.7             | 7.7  | 7.4  | 7.8  | 8.7  | 9.3               | 2.5   | 6.4   | 9.5   |
| Mexico                   | 6179                             | 6934   | 7593   | 7897   | 7850   | 6.0             | 6.2  | 6.4  | 6.5  | 6.7  | 12.2              | 9.5   | 4.0   | -0.6  |
| Argentina                | 4306                             | 4572   | 5069   | 5363   | 5616   | 4.2             | 4.1  | 4.2  | 4.4  | 4.8  | 6.2               | 10.9  | 5.8   | 4.7   |
| Brazil                   | 2097                             | 2469   | 2595   | 3678   | 4444   | 2.0             | 2.2  | 2.2  | 3.0  | 3.8  | 17.7              | 5.1   | 41.7  | 20.8  |
| Puerto Rico              | 1828                             | 1898   | 2046   | 2233   | 2148   | 1.8             | 1.7  | 1.7  | 1.9  | 1.8  | 3.8               | 7.8   | 9.1   | -3.8  |
| <i>sub-total</i>         | 85687                            | 94240  | 99432  | 99814  | 103340 | 83.5            | 83.7 | 83.3 | 82.7 | 87.9 | 10.0              | 5.5   | 0.4   | 3.5   |
| <i>OIC share</i>         | --                               | --     | --     | --     | --     | --              | --   | --   | --   | --   | --                | --    | --    | --    |
| <b>East Asia/PACIFIC</b> | 74559                            | 82383  | 75742  | 67800  | 75308  | 18.3            | 18.8 | 17.2 | 15.4 | 16.6 | 10.5              | -8.1  | -10.5 | 11.1  |
| China                    | 8733                             | 10200  | 12074  | 12602  | 14099  | 11.7            | 12.4 | 15.9 | 18.6 | 18.7 | 16.8              | 18.4  | 4.4   | 11.9  |
| Australia                | 7857                             | 9113   | 9057   | 7335   | 7525   | 10.5            | 11.1 | 12.0 | 10.8 | 10.0 | 16.0              | -0.6  | -19.0 | 2.6   |
| Hong Kong (China)        | 9604                             | 10836  | 9242   | 7083   | 7041   | 12.9            | 13.2 | 12.2 | 10.4 | 9.3  | 12.8              | -14.7 | -23.4 | -0.6  |
| Thailand                 | 7664                             | 8664   | 7048   | 5934   | 6680   | 10.3            | 10.5 | 9.3  | 8.8  | 8.9  | 13.0              | -18.7 | -15.8 | 12.6  |
| S. Korea                 | 5587                             | 5430   | 5116   | 5890   | 5600   | 7.5             | 6.6  | 6.8  | 8.7  | 7.4  | -2.8              | -5.8  | 15.1  | -4.9  |
| Singapore                | 8390                             | 8012   | 6066   | 5162   | 4362   | 11.3            | 9.7  | 8.0  | 7.6  | 5.8  | -4.5              | -24.3 | -14.9 | 7.5   |



|  |                    |        |        |        |        |        |      |      |      |      |      |       |       |       |       |
|--|--------------------|--------|--------|--------|--------|--------|------|------|------|------|------|-------|-------|-------|-------|
|  | Indonesia          | 5228   | 6308   | 5321   | 4045   | 4683   | 7.0  | 7.7  | 7.0  | 6.0  | 6.2  | 20.7  | -15.6 | -24.0 | 15.8  |
|  | Japan              | 3226   | 4078   | 4326   | 3742   | 4034   | 4.3  | 5.0  | 5.7  | 5.5  | 5.4  | 26.4  | 6.1   | -13.7 | 7.8   |
|  | Macao              | 3126   | 3127   | 2956   | 2622   | 2700   | 4.2  | 3.8  | 3.9  | 3.9  | 3.6  | 0.0   | -5.5  | -11.3 | 3.0   |
|  | Malaysia           | 3909   | 4447   | 2702   | 2456   | 2822   | 5.2  | 5.4  | 3.6  | 3.6  | 3.7  | 13.8  | -39.2 | -9.1  | 14.9  |
|  | <i>sub-total</i>   | 63324  | 70215  | 63908  | 56871  | 59546  | 86.6 | 86.3 | 85.7 | 85.8 | 79.1 | 9.1   | -1.5  | -1.1  | 7.8   |
|  | <i>OIC share</i>   | 9137   | 10755  | 8023   | 6501   | 7505   | 12.3 | 13.1 | 10.6 | 9.6  | 10.0 | 17.7  | -25.4 | -19.0 | 15.4  |
|  | <b>EUROPE</b>      | 211015 | 221463 | 221927 | 229649 | 224346 | 51.8 | 50.6 | 50.4 | 52.0 | 49.3 | 5.0   | 0.2   | 3.5   | -2.3  |
|  | France             | 27527  | 28357  | 28009  | 29931  | 24657  | 13.0 | 12.8 | 12.6 | 13.0 | 11.0 | 3.0   | -1.2  | 6.9   | 6.3   |
|  | Italy              | 28729  | 30017  | 29714  | 29809  | 31000  | 13.6 | 13.6 | 13.4 | 13.0 | 13.8 | 4.5   | -1.0  | 0.3   | 4.0   |
|  | Spain              | 25388  | 26690  | 26651  | 29737  | 25179  | 12.0 | 12.1 | 12.0 | 12.9 | 11.2 | 5.1   | -0.1  | 11.6  | 9.5   |
|  | UK                 | 18554  | 19173  | 20039  | 20978  | 20972  | 8.8  | 8.7  | 9.0  | 9.1  | 9.3  | 3.3   | 4.5   | 4.7   | 0.0   |
|  | Germany            | 17867  | 17445  | 16488  | 16429  | 9570   | 8.5  | 7.9  | 7.4  | 7.2  | 4.3  | -2.4  | -5.5  | -0.4  | -0.2  |
|  | Austria            | 13492  | 12780  | 10991  | 11184  | 11259  | 6.4  | 5.8  | 5.0  | 4.9  | 5.0  | -5.3  | -14.0 | 1.8   | 0.7   |
|  | Poland             | 6614   | 8444   | 8679   | 7946   | 6100   | 3.1  | 3.8  | 3.9  | 3.5  | 2.7  | 27.7  | 2.8   | -8.4  | -23.2 |
|  | Switzerland        | 9365   | 8826   | 7915   | 7815   | 7355   | 4.4  | 4.0  | 3.6  | 3.4  | 3.3  | -5.8  | -10.3 | -1.3  | -5.9  |
|  | Turkey             | 4957   | 5962   | 8088   | 7809   | 5000   | 2.3  | 2.7  | 3.6  | 3.4  | 2.2  | 20.3  | 35.7  | -3.4  | -36.0 |
|  | Netherlands        | 6563   | 6548   | 6323   | 6803   | 7051   | 3.1  | 3.0  | 2.8  | 3.0  | 3.1  | -0.2  | -3.4  | 7.6   | 3.6   |
|  | Russia             | 4312   | 6868   | 7164   | 6508   | 7771   | 2.0  | 3.1  | 3.2  | 2.8  | 3.5  | 59.3  | 4.3   | -9.2  | 19.4  |
|  | Belgium            | 5859   | 5963   | 5270   | 5437   | 5354   | 2.8  | 2.7  | 2.4  | 2.4  | 2.4  | 1.8   | -11.6 | 3.2   | -1.5  |
|  | Ukraine            | 3865   | 3416   | 5340   | 5407   | 5374   | 18.0 | 1.5  | 2.4  | 2.4  | 2.4  | -11.6 | 56.3  | 1.3   | -0.6  |
|  | Greece             | 4136   | 3723   | 3772   | 5182   | 5471   | 2.0  | 1.7  | 1.7  | 2.3  | 2.4  | -10.0 | 1.3   | 37.4  | 5.6   |
|  | Portugal           | 4339   | 4265   | 4244   | 4853   | 4928   | 2.1  | 1.9  | 1.9  | 2.1  | 2.2  | -17.0 | -0.5  | 14.3  | 1.5   |
|  | Czech Rep.         | 2875   | 4075   | 3647   | 3719   | 3600   | 1.4  | 1.8  | 1.6  | 1.6  | 1.6  | 41.7  | -10.5 | 2.0   | -3.2  |
|  | Ireland            | 2691   | 3022   | 3189   | 3252   | 3306   | 1.3  | 1.4  | 1.4  | 1.4  | 1.5  | 12.3  | 5.5   | 2.0   | 1.7   |
|  | Croatia            | 1346   | 2014   | 2530   | 2733   | 2541   | 0.6  | 0.9  | 1.1  | 1.2  | 1.1  | 49.6  | 25.6  | 8.0   | -7.0  |
|  | Hungary            | 1714   | 2246   | 2582   | 2504   | 2471   | 0.8  | 1.0  | 1.2  | 1.1  | 1.1  | 31.0  | 15.0  | -3.0  | -1.3  |
|  | <i>sub-total</i>   | 190193 | 199834 | 200635 | 208036 | 188958 | 90.1 | 90.2 | 90.4 | 90.6 | 84.2 | 5.1   | 0.4   | 3.7   | -9.2  |
|  | <i>OIC share</i>   | 4957   | 5962   | 8088   | 7809   | 5000   | 2.3  | 2.7  | 3.6  | 3.4  | 2.2  | 20.3  | 35.7  | -3.4  | -36.0 |
|  | <b>MIDDLE EAST</b> | 7521   | 8246   | 9186   | 8716   | 8951   | 1.8  | 19.0 | 2.1  | 2.0  | 2.0  | 9.6   | 11.4  | -5.1  | 2.7   |
|  | Saudi Arabia       |        |        |        |        |        |      |      |      |      |      |       |       |       |       |

|  |                                  |        |        |        |        |        |      |      |      |       |      |       |       |       |       |  |
|--|----------------------------------|--------|--------|--------|--------|--------|------|------|------|-------|------|-------|-------|-------|-------|--|
|  | Egypt                            | 2684   | 3204   | 3727   | 2564   | 3815   | 35.7 | 38.9 | 40.6 | 29.4  | 42.6 | 19.4  | 16.3  | -31.2 | 48.8  |  |
|  | UAE                              | 389    | 459    | 535    | 562    | 549    | 5.2  | 5.6  | 5.8  | 6.4   | 6.1  | 180.0 | 16.6  | 5.0   | -2.4  |  |
|  | Bahrain                          | 247    | 263    | 311    | 366    | 339    | 3.3  | 3.2  | 3.4  | 4.2   | 3.8  | 6.5   | 18.3  | 17.7  | -7.5  |  |
|  | <i>sub-total</i>                 | 3320   | 3926   | 4573   | 3492   | 4702   | 44.1 | 47.6 | 49.8 | 40.1  | 52.5 | 18.3  | 8.0   | 1.8   | 24.4  |  |
|  | <i>OIC share</i>                 | 3320   | 3926   | 4573   | 3492   | 4702   | 44.1 | 47.6 | 49.8 | 40.1  | 52.5 | 18.3  | 16.5  | -23.6 | 34.7  |  |
|  | <b>SOUTH ASIA</b>                | 3494   | 3948   | 4276   | 4382   | 4329   | 0.9  | 0.9  | 1.0  | 1.0   | 1.0  | 13.0  | 8.3   | 2.5   | -1.2  |  |
|  | India                            | 2609   | 2963   | 3152   | 3124   | 3138   | 74.7 | 75.1 | 73.7 | 713.0 | 72.5 | 13.6  | 6.4   | -0.9  | 0.4   |  |
|  | Iran                             | 190    | 244    | 327    | 441    | 384    | 5.4  | 6.2  | 7.6  | 10.1  | 8.9  | 28.4  | 34.0  | 34.9  | -12.9 |  |
|  | Nepal                            | 117    | 117    | 116    | 124    | 120    | 3.3  | 3.0  | 2.7  | 2.8   | 2.8  | 0.0   | -0.9  | 6.9   | -3.2  |  |
|  | Pakistan                         | 114    | 146    | 117    | 98     | 108    | 3.3  | 3.7  | 2.7  | 2.2   | 2.5  | 28.1  | -19.9 | -16.2 | 9.7   |  |
|  | <i>sub-total</i>                 | 3030   | 3470   | 3712   | 3787   | 3750   | 86.7 | 87.9 | 86.8 | 86.4  | 86.6 | 14.5  | 7.0   | 2.0   | -1.0  |  |
|  | <i>OIC share</i>                 | 304    | 390    | 444    | 539    | 492    | 8.7  | 9.9  | 10.4 | 12.3  | 11.4 | 28.3  | 13.8  | 21.4  | -8.8  |  |
|  | Total main tourist destinations  | 350539 | 377604 | 378122 | 378198 | 366652 | 86.1 | 86.2 | 86.0 | 85.7  | 80.6 | 7.1   | 0.1   | 0.0   | -3.1  |  |
|  | <i>Of which OIC share</i>        | 20424  | 24158  | 23991  | 21643  | 21157  | 5.0  | 5.5  | 5.5  | 4.9   | 4.6  | 18.3  | -0.7  | -9.8  | -2.2  |  |
|  | %                                | 5.8    | 6.4    | 6.3    | 5.7    | 5.8    |      |      |      |       |      |       |       |       |       |  |
|  | Total other Tourist Destinations | 56778  | 60334  | 61774  | 63057  | 62416  | 13.9 | 13.8 | 14.0 | 14.3  | 13.7 | 8.9   | 5.1   | 4.5   | 6.0   |  |
|  | <i>Of which OIC share</i>        | 4066   | 4231   | 4592   | 5153   | 5908   | 1.0  | 1.0  | 1.0  | 1.2   | 1.3  | 4.1   | 8.5   | 12.2  | 14.7  |  |
|  | %                                | 7.2    | 7.0    | 7.4    | 8.2    | 9.5    |      |      |      |       |      |       |       |       |       |  |

Source: World Tourism Organization, Compendium of Tourism Statistics 1994-1998 and 1993-1997

**ANNEX III**  
**OIC COUNTRIES BALANCE OF TRAVEL AS A**  
**PERCENT OF GNP 1993-1998**

|              | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | Average |
|--------------|------|------|------|------|------|------|---------|
| Maldives     | 55.0 | 65.3 | 67.6 | 76.8 | 75.9 | 80.4 | 70.2    |
| Tunisia      | 8.4  | 9.0  | 8.3  | 8.4  | 8.5  | 8.8  | 8.6     |
| Lebanon      | 7.8  | 7.1  | 6.1  | 5.4  | 6.5  | 7.4  | 6.7     |
| Comoros      | 1.9  | 2.7  | 3.2  | 10.8 | 13.4 | 8.1  | 6.7     |
| Guyana       | 7.4  | 5.2  | 4.9  | 5.9  | 8.8  | 7.8  | 6.7     |
| Bahrain      | 2.1  | 9.6  | 5.6  | 5.7  | 5.1  | 6.1  | 5.7     |
| Jordan       | 5.4  | 4.0  | 4.1  | 6.1  | 6.3  | 7.9  | 5.6     |
| Syria        | 3.6  | 4.5  | 5.3  | 4.5  | 3.0  | 3.7  | 4.1     |
| Morocco      | 4.2  | 3.8  | 3.7  | 4.2  | 4.0  | 4.0  | 4.0     |
| Gambia       | 3.0  | 3.9  | 1.9  | 4.4  | 4.0  | 0.0  | 2.9     |
| Egypt        | 2.6  | 1.8  | 2.7  | 3.2  | 3.4  | 2.0  | 2.6     |
| Turkey       | 1.7  | 2.6  | 2.4  | 2.6  | 3.3  | 3.0  | 2.6     |
| Malaysia     | 0.9  | 2.8  | 2.7  | 2.8  | 1.2  | 3.1  | 2.2     |
| Albania      | 3.6  | 2.3  | 2.1  | 2.5  | 0.8  | 1.2  | 2.1     |
| Turkmenistan | na   | na   | na   | 0.0  | -1.4 | 7.4  | 2.0     |
| Indonesia    | 1.6  | 1.7  | 1.6  | 1.8  | 1.4  | 2.3  | 1.7     |
| Saudi Arabia | 1.0  | 1.0  | na   | na   | na   | na   | 1.0     |
| UAE          | 0.8  | 0.8  | 0.9  | 0.9  | 1.2  | 1.2  | 0.9     |
| Sierra Leone | 1.8  | 0.6  | 0.5  | 0.9  | 0.4  | na   | 0.8     |
| Senegal      | -0.4 | 0.3  | -0.6 | 0.5  | 0.7  | 4.0  | 0.8     |
| Benin        | 1.2  | 0.3  | 0.7  | 0.0  | 0.3  | 1.1  | 0.6     |
| Burkina Faso | -1.3 | -0.8 | 1.1  | 1.2  | 0.2  | 1.6  | 0.3     |
| Oman         | 0.4  | 0.4  | 0.4  | 0.5  | 0.6  | -0.5 | 0.3     |
| Suriname     | 0.2  | na   | na   | na   | na   | na   | 0.2     |
| Uzbekistan   | na   | na   | na   | 0.1  | 0.1  | na   | 0.1     |
| Algeria      | 0.1  | 0.0  | 0.0  | 0.0  | 0.0  | 0.1  | 0.0     |
| Iran         | -0.6 | 0.1  | 0.1  | 0.1  | 0.0  | 0.1  | 0.0     |
| Iraq         | na   | na   | 0.0  | 0.0  | 0.0  | 0.0  | 0.0     |
| Kyrgyz Rep.  | 0.1  | 0.0  | -0.1 | -0.1 | 0.1  | -0.4 | -0.1    |
| Pakistan     | -0.6 | 0.1  | -0.1 | -0.7 | 0.1  | -0.4 | -0.3    |
| Uganda       | -0.3 | -1.0 | 0.0  | -0.3 | 0.0  | na   | -0.3    |
| Sudan        | -0.1 | -0.6 | -0.6 | -0.3 | -0.3 | -0.2 | -0.4    |
| Azerbaijan   | 1.3  | 1.7  | -2.2 | -1.6 | -0.4 | -1.0 | -0.4    |
| Bangladesh   | -0.4 | -0.6 | -0.5 | -0.7 | -0.6 | -0.7 | -0.6    |
| Mauritania   | -2.6 | -1.2 | 0.0  | 0.0  | 0.0  | 0.0  | -0.6    |
| Yemen        | -0.8 | -1.9 | -0.8 | -0.8 | -0.3 | -0.1 | -0.8    |
| Libya        | -0.9 | -0.9 | na   | -0.9 | -0.7 | -0.6 | -0.8    |
| Guinea       | -1.3 | -0.9 | -0.8 | -0.8 | -0.8 | -0.9 | -0.9    |
| Cameroon     | -1.6 | -0.5 | -0.9 | na   | na   | na   | -1.0    |
| Djibouti     | -1.7 | -2.3 | -2.1 | 0.0  | 0.0  | 0.0  | -1.0    |
| Niger        | -2.9 | -1.5 | -1.1 | -0.3 | -0.3 | -0.3 | -1.1    |
| Togo         | -2.2 | -1.6 | -0.4 | na   | na   | na   | -1.4    |
| Mali         | -2.0 | -2.1 | -2.0 | -1.5 | -1.5 | 0.1  | -1.5    |

|                |      |      |      |      |      |      |      |
|----------------|------|------|------|------|------|------|------|
| Chad           | -4.8 | -1.5 | na   | na   | 0.6  | na   | -1.9 |
| Nigeria        | -1.4 | -3.9 | -3.3 | -3.7 | -4.5 | -3.7 | -3.4 |
| Gabon          | -3.7 | -3.7 | -3.1 | na   | na   | na   | -3.5 |
| Kuwait         | -6.7 | -7.5 | -7.0 | -6.6 | -6.2 | -6.4 | -6.8 |
| <b>No data</b> |      |      |      |      |      |      |      |
| Afghanistan    | na   | na   | na   | na   | na   | na   | na   |
| Brunei         | na   | na   | na   | na   | na   | na   | na   |
| G. Bissau      | na   | na   | na   | na   | na   | na   | na   |
| Kazakhstan     | na   | na   | na   | na   | na   | na   | na   |
| Mozambique     | na   | na   | na   | na   | na   | na   | na   |
| Palestine      | na   | na   | na   | na   | na   | na   | na   |
| Qatar          | na   | na   | na   | na   | na   | na   | na   |
| Somalia        | na   | na   | na   | na   | na   | na   | na   |
| Tajikistan     | na   | na   | na   | na   | na   | na   | na   |

#### SESRTCIC staff calculation

Data Sources: WTO, World Bank and SESRTCIC databases.

No data relevant data was available for 11 OIC countries viz., Afghanistan, Brunei, Guinea-Bissau, Iraq, Kazakhstan, Mozambique, Palestine, Qatar, Somalia, Tajikistan and UAE

Only partially available data for 13 other OIC countries,

-- = Not available

**ANNEX IV**  
**OIC COUNTRIES BALANCE OF TRAVEL AS A PERCENT OF XGS**  
**1993-1998**

|              | 1993  | 1994  | 1995  | 1996 | 1997 | 1998 | Average |
|--------------|-------|-------|-------|------|------|------|---------|
| Maldives     | 49.6  | 52.1  | 52.7  | 56.3 | 55.2 | 57.2 | 53.8    |
| Comoros      | 7.0   | 8.7   | 11.4  | 37.4 | 43.6 | 34.5 | 23.8    |
| Lebanon      | 19.0  | 19.3  | 15.8  | 15.1 | 19.6 | 43.2 | 22.0    |
| Tunisia      | 18.4  | 17.7  | 16.3  | 17.5 | 17.4 | 18.0 | 17.5    |
| Morocco      | 11.8  | 11.4  | 9.9   | 12.6 | 11.1 | 11.2 | 11.3    |
| Syria        | 8.9   | 10.9  | 13.4  | 10.6 | 8.1  | 11.5 | 10.5    |
| Turkey       | 10.0  | 10.5  | 9.8   | 9.3  | 11.0 | 9.7  | 10.0    |
| Egypt        | 7.2   | 5.9   | 8.2   | 11.1 | 12.2 | 8.7  | 8.9     |
| Turkmenistan | na    | na    | na    | -0.1 | -5.3 | 25.9 | 6.8     |
| Suriname     | 2.7   | 3.5   | 6.5   | 6.8  | 11.1 | 10.1 | 6.8     |
| Guyana       | 7.4   | 5.2   | 4.9   | 5.9  | 8.8  | 7.4  | 6.6     |
| Albania      | 8.1   | 8.5   | 6.7   | 7.2  | 3.8  | 4.6  | 6.5     |
| Jordan       | 5.4   | 4.0   | 4.1   | 6.1  | 6.3  | 8.3  | 5.7     |
| Indonesia    | 5.8   | 6.2   | 5.6   | 6.6  | 4.4  | 3.4  | 5.3     |
| Gambia       | 4.5   | 6.4   | 3.9   | 7.5  | 6.9  | 0.0  | 4.9     |
| Sierra Leone | 7.3   | 2.3   | 3.1   | 6.2  | 3.2  | na   | 4.4     |
| Bahrain      | 1.4   | 5.5   | 2.9   | 2.6  | 2.2  | 9.7  | 4.0     |
| Burkina Faso | -6.1  | -3.9  | 5.9   | 7.2  | 8.9  | 8.5  | 3.4     |
| Saudi Arabia | 2.6   | 2.7   | na    | na   | na   | na   | 2.7     |
| Senegal      | -1.2  | 0.7   | -1.4  | 1.3  | 2.0  | 13.5 | 2.5     |
| Malaysia     | 1.0   | 2.8   | 2.6   | 2.8  | 1.1  | 2.9  | 2.2     |
| Benin        | 4.1   | 1.0   | 2.3   | 0.2  | 1.0  | 4.6  | 2.2     |
| UAE          | 1.3   | 1.5   | 1.6   | 1.7  | 1.7  | 2.2  | 1.7     |
| Brunei       | 1.5   | 1.7   | na    | na   | na   | na   | 1.6     |
| Iraq         | 3.2   | 3.1   | 0.0   | 0.0  | 0.0  | 0.0  | 1.1     |
| Oman         | 0.7   | 0.7   | 0.7   | 0.7  | 0.8  | na   | 0.7     |
| Uzbekistan   | na    | na    | na    | 0.4  | 0.5  | na   | 0.4     |
| Algeria      | 0.5   | 0.1   | -0.1  | -0.1 | 0.0  | 0.2  | 0.1     |
| Kyrgyz Rep.  | 0.6   | 0.3   | -0.4  | -0.4 | 0.3  | -1.1 | -0.1    |
| Iran         | -3.7  | 0.4   | 0.4   | 0.6  | -0.2 | 1.1  | -0.2    |
| Yemen        | -1.5  | -2.0  | -0.9  | -1.0 | -0.4 | -0.1 | -1.0    |
| Azerbaijan   | 8.6   | 7.8   | -10.0 | -7.7 | -1.5 | -3.6 | -1.1    |
| Mauritania   | -5.4  | -2.8  | 0.0   | 0.0  | 0.0  | 0.0  | -1.4    |
| Guinea       | -1.3  | -0.9  | -0.8  | -0.8 | -0.8 | -3.7 | -1.4    |
| Pakistan     | -3.1  | 0.7   | -0.6  | -4.1 | 0.3  | -2.2 | -1.5    |
| Djibouti     | -3.1  | -4.7  | -4.7  | 0.0  | 0.0  | 0.0  | -2.1    |
| Libya        | -2.6  | -2.6  | na    | -2.1 | -1.5 | -1.8 | -2.1    |
| Sudan        | -1.3  | -5.8  | -3.2  | -2.1 | -2.7 | -3.5 | -3.1    |
| Uganda       | -4.1  | -11.0 | -0.3  | -2.4 | -0.2 | na   | -3.6    |
| Bangladesh   | -3.5  | -4.4  | -3.8  | -4.8 | -3.7 | -3.9 | -4.0    |
| Cameroon     | -8.3  | -2.2  | -3.1  | na   | na   | na   | -4.5    |
| Gabon        | -5.4  | -5.2  | -4.5  | na   | na   | na   | -5.0    |
| Niger        | -12.4 | -8.2  | -6.3  | -1.7 | -1.9 | -2.1 | -5.5    |

|                |       |       |       |       |       |       |       |
|----------------|-------|-------|-------|-------|-------|-------|-------|
| Mali           | -8.8  | -7.4  | -7.4  | -6.3  | -5.0  | 0.3   | -5.7  |
| Nigeria        | -2.3  | -8.0  | -6.4  | -6.8  | -9.3  | -12.0 | -7.5  |
| Chad           | -32.5 | -8.7  | na    | na    | 3.2   | na    | -12.7 |
| Kuwait         | -20.7 | -21.9 | -19.4 | -17.6 | -16.3 | -29.3 | -20.8 |
| Togo           | -46.1 | -25.9 | -8.0  | na    | na    | na    | -26.7 |
| <b>No data</b> |       |       |       |       |       |       |       |
| Afghanistan    | na    | na    | na    | na    | na    | na    | na    |
| G. Bissau      | na    | na    | na    | na    | na    | na    | na    |
| Kazakhstan     | na    | na    | na    | na    | na    | na    | na    |
| Mozambique     | na    | na    | na    | na    | na    | na    | na    |
| Palestine      | na    | na    | na    | na    | na    | na    | na    |
| Qatar          | na    | na    | na    | na    | na    | na    | na    |
| Somalia        | na    | na    | na    | na    | na    | na    | na    |
| Tajikistan     | na    | na    | na    | na    | na    | na    | na    |

#### SESRTCIC Staff Calculation

##### Data Sources:

Compendium of Tourism Statistics World Tourism Organization,  
World Bank, Global development Finance  
Statistical Year Book of the OIC Countries 2000, SESRTCIC