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**BASIC INDICATORS OF INTERNATIONAL
TOURISM IN THE OIC COUNTRIES AND
MODALITIES FOR STRENGTHENING
COOPERATION**

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1. INTRODUCTION

The strong and sustained rise of international tourism over the past fifty years is one of the most remarkable economic, social and cultural phenomena of our time. According to the World Tourism Organisation, the number of international tourist arrivals has grown from 25 million in 1950 to 687 million in 2000. This is equivalent to an average annual growth of 7 percent over a period of 50 years. The revenues generated by these tourists (not including airline ticket sales and revenues from domestic tourism) have grown by 11 percent a year over the same period. This rate of growth far outstrips that of the world economy as a whole. International tourism receipts reached \$477 billion in 2000, making it one of the largest categories of international trade; it equals or exceeds that of oil and petroleum product exports, or that of cars and transport equipment.

In addition to strong overall expansion, international tourism is characterised by continuing geographical spread and diversification of tourist destinations. While recent trends in international tourism indicate that tourism activity is still concentrated in the developed regions of Europe and the Americas, a substantial proliferation of new tourist-generating and tourist-receiving markets is also observed in the developing regions. In 1950, the traditional tourist-receiving regions of Europe and the Americas attracted 97 percent of the world's total tourist arrivals. However, by 2002, this figure fell to 73 percent in favour of the developing regions of Asia and the Pacific, the Middle East, and Africa.

For many countries in these regions, in particular most small island countries and some least developed countries, international tourism has become one of the main economic activities and an important source of foreign exchange earnings and employment. Therefore, tourism has been given much attention in the national development strategies of many developing countries and recently placed on the agenda of many international conferences on sustainable development. To fail to include tourism in these strategies is to overlook the fact that it presents the

biggest and, undoubtedly, the most diversified and creative economic activity of all.

Considering their rich and diverse natural, geographical, historical and cultural heritage assets, the OIC countries have vast potential for the development of sustainable international tourism sector. The number of international tourist arrivals in the OIC countries, for which the data are available, increased from 35.6 million in 1990 to 67.9 million in 2000, corresponding to an average annual growth rate of 6.7 percent. This rate was higher than the world average and the averages of the traditional tourist-receiving regions of Europe and the Americas during the same period. However, considering the modest share of the OIC region in the world tourism market (around 10 percent), it seems that a large part of the tourism potential of many OIC countries remains unutilized. International tourism in the OIC region is, therefore, still concentrated in few countries. Turkey, Malaysia, Indonesia, Egypt, Tunisia and Morocco serve as typical examples in this regard.

In fact, international tourism is a very important sector that, if properly planned and managed, could play a significant role in the economic development of the OIC countries. This is not only due to their existing and potential tourism resources, but also to the fact that their citizens travel in large numbers around the world for business, leisure and other purposes. It is for this reason that tourism has been identified as one of the ten priority areas of cooperation in the Plan of Action to Strengthen Economic and Commercial Cooperation among the Member Countries of the OIC. Indeed, cooperation activities in this field have recently assumed greater importance on the agenda of the OIC, considering that three ministerial conferences on tourism were held within the short period of the last three years.

Given all that, this paper attempts to assess the performance and the economic role of the international tourism sector in the OIC member countries. In so doing, it examines and analyses the traditionally used indicators in measuring international tourism¹. The analysis is made at the country and OIC sub-regional levels as well as at the level of the

¹ International tourism has traditionally been measured in *International Tourist Arrivals* and *International Tourism Receipts*. For a proper understanding of these two terms, see explanatory note (1) under Table A.1 and A.2 in the Annex.

OIC region as a whole. The paper also sheds light on some issues and problems of tourism development in the OIC countries. In this context, it proposes a set of recommendations to serve as policy guidelines to which the attention of the member countries needs to be drawn. Within the framework of the OIC Plan of Action, and in the light of the resolutions and declarations adopted at the previous OIC meetings on tourism, the paper also proposes certain means and modalities for strengthening cooperation among the OIC countries in this important area.

2. RECENT TRENDS IN WORLD INTERNATIONAL TOURISM: OVERVIEW

Over the last decade, the number of international tourist arrivals worldwide increased from 455.9 million in 1990 to 687.3 million in 2000, corresponding to an average annual growth rate of 4.2 percent (Table 1). In 2000, where all the regions of the world hosted more tourists, international tourist arrivals grew by 5.4 percent, the highest growth rate in the last decade (Table A.1 in the Annex). Europe and the Americas were the main tourist-receiving regions in the world. They attracted, respectively, 392.7 and 128 million tourist arrivals in 2000, corresponding, respectively, to 57.1 and 18.6 percent of the world tourism market. However, international tourist arrivals in these two regions grew by an average rate of 3.4 and 3.2 percent, respectively, over the period 1990-2000.

Since modern tourism is characterised by a growing tendency for tourists to visit new destinations, and together with tourism product diversification and increasing competition, new destinations are steadily growing at a faster pace and increasing their share in the world market. The average growth rate of international tourists arrivals in the period 1990-2000 was above the world average in the Middle East (9.6 percent), Asia and the Pacific (7.2 percent), and Africa (6.2 percent). In contrast, this rate was below the world average in the more traditional tourist-receiving regions of Europe (3.4 percent) and the Americas (3.2 percent). Consequently, the share of these two regions in the world tourism market narrowed substantially (from 61.5 and 20.4 percent in 1990 to 56.9 and 16.3 percent in 2002, respectively) with market shares increasing for the other regions.

TABLE 1: INTERNATIONAL TOURIST ARRIVALS BY REGION

	Europe	Americas	Asia/ Pacific	Africa	Middle East	World Total
Tourist Arrivals (million)						
1990	280.6	93.0	57.7	15.0	9.6	455.9
2000	392.7	128.0	115.2	27.4	24.0	687.3
2001	390.8	120.2	121.2	28.3	23.6	684.1
2002	399.8	114.8	131.3	29.1	27.6	702.6
Market Share (%)						
1990	61.5	20.4	12.7	3.3	2.1	100.0
2000	57.1	18.6	16.8	4.0	3.5	100.0
2001	57.1	17.6	17.7	4.1	3.4	100.0
2002	56.9	16.3	18.7	4.1	3.9	100.0
Growth Rate (%)						
1990-2000	3.4	3.2	7.2	6.2	9.6	4.2
2000-2001	-0.5	-6.1	5.2	3.3	-1.7	-0.5
2001-2002	2.3	-4.5	8.3	2.7	16.9	2.7

Source: World Tourism Organisation, "Tourism Market Trends 2002" and "Tourism Highlights 2003".

In 2001 and for the first time since 1982, there has been a small reduction in the number of international tourist arrivals where 684.1 million have been recorded, corresponding to a slight contraction of 0.5 percent compared to the previous year. International tourist flows declined affected negatively by the global economic slowdown in 2001, particularly in North American, European and Asian economies (major tourism generating markets) and the impact of the events of 11 September of that year. Yet, not every destination was equally affected by the fall in world tourist arrivals in 2001. Most affected was the Americas (a drop of 6.1 percent) followed by the Middle East (-1.7 percent) and Europe (-0.5 percent).

However, for tourism, a sudden crisis does not necessary translate into a long-term recession. Experience shows that tourism has always managed to bounce back from past crises with remarkable speed and recover its previously strong growth levels. Although 2002 was certainly not an easy year, international tourism held up fairly well where the number of international tourist arrivals grew by 2.7 percent. Indeed, the 702.6 million international tourist arrivals recorded in 2002 surpassed the previous record year 2000. However, the recovery in 2002 shows a substantial change in the world tourism map: while Europe remained firmly in the first place, Asia and the Pacific claimed the second place from the Americas (Table 1).

In 2003, international tourism faced another considerably difficult year in which three negative factors came together: the war in Iraq, the SARS panic in Asia and the Pacific and the long-awaited world economic recovery. Preliminary estimates of full year results show that the number of international tourist arrivals worldwide slid back by a bit more than 1 percent to 694 million². Yet, based on its expectation that this slowdown will be compensated in the mid-to long-term, the World Tourism Organisation reaffirms that international tourism is firmly on the way to recovery and back to the earlier predicted trends. That is international tourism activity will enjoy steady growth in the foreseeable future with the number of international tourist arrivals expected to surpass 1 billion in 2010 and 1.5 billion in 2020.

TABLE 2: INTERNATIONAL TOURISM RECEIPTS BY REGION

	Europe	Americas	Asia/ Pacific	Middle East	Africa	World Total
Tourism Receipts (\$ billion)						
1990	143.4	69.4	41.3	4.6	5.4	264.1
2000	234.5	132.8	86.8	12.2	10.9	477.2
2001	230.4	121.6	88.2	11.8	11.7	463.7
2002	240.5	114.3	94.7	13.0	11.8	474.3
Market Share (%)						
1990	54.3	26.3	15.6	1.7	2.0	100.0
2000	49.1	27.8	18.2	2.6	2.3	100.0
2001	49.7	26.2	19.0	2.5	2.5	100.0
2002	50.7	24.1	20.0	2.7	2.5	100.0
Growth Rate (%)						
1990-2000	5.0	6.7	7.7	10.2	7.3	6.1
2000-2001	-1.7	-8.4	1.6	-3.3	7.3	-2.8
2001-2002	4.4	-6.0	7.4	10.2	0.9	2.3

Source: World Tourism Organisation, "Tourism Market Trends 2002" and "Tourism Highlights 2003".

On the other hand, the figures in Table 2 show that international tourism receipts, at current prices and excluding international transport costs, recorded an average annual growth rate of 6.1 percent in the period 1990-2000. In 2000, international tourism activity generated US\$ 477.2 billion, corresponding to US\$ 1.3 billion per day or US\$ 694 per tourist arrival. Yet, due to the sudden decline in international tourist arrivals in 2001, international tourism receipts decreased to US\$ 463.7 billion,

² World Tourism Organisation, "WTO World Tourism Barometer", Vol. 2, No. 1, January 2004.

corresponding to a reduction by 2.8 percent, with a substantial decrease in the Americas and, to a lesser extent, in the Middle East and Europe. Although international tourism receipts grew by 2.3 percent in 2002, the level of US\$ 474.3 billion recorded in that year was still lower than that of the record year 2000.

When the figures on tourism receipts and tourist arrivals are compared (Tables 1 and 2), it is observed that the former decreased at a rate higher than that of the latter in 2001 but did not recover by the same high rate in 2002. This is due to the fact that in economically harsh times, tourists typically react not so much by refraining from travel but by trading down, i.e. they choose for instance shorter stays in less expensive destinations closer to home, with travel and accommodation in lower categories. Therefore, not every destination was equally affected by the fall in international tourism receipts in 2001. Most affected was the Americas (a drop of 8.4 percent) followed by the Middle East (-3.3 percent), and Europe (-1.7 percent). In contrast, an increase in international tourism receipts was recorded in Africa and Asia/Pacific (Table 2).

It is also observed that while the trends in regional market shares in world tourism receipts followed in general similar patterns to those in tourist arrivals, the average growth rates of tourism receipts were somewhat different. For example, Europe was the top tourism earner in 2000 with 49.1 percent share in the world tourism receipts, followed by the Americas with 27.8 percent and Asia/Pacific with 18.2 percent.

However, when the average growth rates of tourism receipts in the period 1990-2000 are considered, the picture becomes completely different. The Middle East comes at the top with 10.2 percent, followed by Asia/Pacific with 7.7 percent, Africa with 7.3 percent and Europe at the bottom of the list with 5 percent. This is mainly due to the fact that receipts per arrival vary as each region has its own tourism characteristics in terms of the length of stay of tourists, purpose of visit, geographical distance, etc. In this context, the world average tourism receipts per arrival in 2002 amounted to US\$ 675, the highest being in the Americas (US\$ 996) followed by Asia/Pacific (US\$ 721) and Europe (US\$ 602) (calculated using the data in Tables 1 and 2).

3. BASIC INDICATORS AND ECONOMIC ROLE OF INTERNATIONAL TOURISM IN THE OIC COUNTRIES

In the light of the above overview of the world trends in international tourism, this section attempts to assess the performance and the economic role of the international tourism sector in the OIC countries. In particular, the trends in the two traditionally used indicators in measuring international tourism (i.e. *International Tourist Arrivals* and *International Tourism Receipts*) are examined in detail. The analysis is made at the country and OIC sub-regional levels as well as at the level of the OIC region as a whole.

3.1. International Tourist Arrivals

The number of international tourist arrivals in the OIC countries, for which the data are available, increased from 35.6 million in 1990 to 67.9 million in 2000, corresponding to an average annual growth rate of 6.7 percent. This rate was higher than the world average and the averages of the traditional tourist-receiving regions of Europe and the Americas during the same period. Like the other regions of the world, the OIC region hosted more tourists in 2000 with the total international tourist arrivals being impressively increased by 13.8 percent, its ever-highest growth rate and the highest amongst the other regions in that year (Table A.1 in the Annex). However, the relative share of the OIC countries in the world tourism market accounted for 9.9 percent in 2000, an increase by 2.1 percentage point over their share in 1990.

In 2001, the OIC region was the least affected amongst all other regions by the sudden slowdown of the world tourism activity. Indeed, the number of international tourist arrivals in the OIC countries increased by 8.4 percent in 2001 where the 73.6 million arrivals surpassed the previous record year 2000. Except the OIC sub-region of the Americas (Guyana and Suriname) which recorded a decline in tourist arrivals by 50 percent, all the OIC destinations recorded increases in the number of tourist arrivals. The highest rate of growth was recorded by the OIC countries in the Europe and central Asian region (27.3 percent) and the lowest was recorded by the OIC countries in the Middle East region (0.4 percent). Consequently, the relative share of the OIC region in the world tourism market accounted for 10.8 percent in 2001, a slight increase by 0.9 percentage point over the previous year. In 2002, the number of

TABLE 3: OIC INTERNATIONAL TOURIST ARRIVALS BY REGION AND MAIN DESTINATIONS

	Tourist Arrivals (million)				Market Share (%)				Growth Rate (%)		
	1990	2000	2001	2002	1990	2000	2001	2002	90/00	00/01	01/02
World Total	455.9	687.3	684.1	702.6	100.0	100.0	100.0	100.0	4.2	-0.5	2.7
OIC Total	35.6	67.9	73.6	78.4	7.8	9.9	10.8	11.2	6.7	8.4	6.5
OIC Regions	Tourist Arrivals (million)				Share in OIC Market				Growth Rate (%)		
Middle East	9.3	23.0	23.1	26.2	26.1	33.9	31.4	33.4	9.5	0.4	13.4
Asia/Pacific	10.9	18.8	20.5	21.1	30.6	27.7	27.9	27.0	5.6	9.0	2.9
Europe & C. Asia	5.4	13.2	16.8	18.2	15.2	19.4	22.8	23.2	9.3	27.3	8.3
Africa	9.9	12.7	13.1	12.8	27.8	18.7	17.8	16.3	2.5	3.1	-2.3
Americas	0.1	0.2	0.1	0.1	0.3	0.3	0.1	0.1	7.2	-50.0	0.0
Main Destinations	Tourist Arrivals (million)				Share in OIC Market				Growth Rate (%)		
Malaysia	7.4	10.2	12.8	13.3	20.8	15.0	17.4	17.1	3.3	25.5	3.9
Turkey	5.4	10.4	11.6	13.2	15.2	15.3	15.8	16.8	6.8	11.5	13.8
Saudi Arabia	2.2	6.6	6.7	7.5	6.2	9.7	9.1	9.6	11.6	1.5	11.9
Tunisia	3.2	5.1	5.3	5.1	9.0	7.5	7.2	6.5	4.8	3.9	-3.8
Indonesia	2.2	5.1	5.2	5.0	6.2	7.5	7.1	6.4	8.8	2.0	-3.8
Egypt	2.4	5.1	4.4	4.9	6.7	7.5	6.0	6.3	7.8	-13.7	11.4
Morocco	4.0	4.2	4.3	4.3	11.2	6.2	5.8	5.5	0.5	2.4	0.0
U.A.E	1.0	3.9	4.1	5.4	2.8	5.7	5.6	6.9	14.6	5.1	31.7
Bahrain	1.4	2.4	2.8	3.2	3.9	3.5	3.8	4.1	5.5	16.7	14.3
Syria	0.6	1.4	1.3	1.7	1.7	2.1	1.8	2.2	8.8	-7.1	30.8
Total	29.8	54.4	58.5	63.6	83.7	80.1	79.5	81.1	6.2	7.5	8.7

Source: Extracted from Table A.1 in the Annex.

Note: Due to rounding, the growth rates in this table slightly differ from those in Table A.1 in the Annex.

international tourist arrivals in the OIC countries, for which the data are available, amounted to 78.4 million, corresponding to an increase by 6.5 percent over the previous year and 11.2 percent share in the world tourism market.

In terms of the shares of the OIC sub-regions in the total OIC international tourism market in the latest three years for which the data are available, the OIC Middle East comes at the top followed by the OIC Asia/Pacific. Together, these two sub-regions accounted for 60 percent of the total tourist arrivals in the OIC region. On the other hand, the OIC sub-regions of Europe/Central Asia, Africa and the Americas accounted for 40 percent of the total OIC international tourism market. However, when the average growth rates of international tourist arrivals during the 1990s are considered, the order of the performance of the OIC sub-regions becomes somewhat different. The OIC Middle East region recorded the highest rate of 9.5 percent followed by the OIC Europe/Central Asia with 9.3 percent, the OIC Americas with 7.2 percent, the OIC Asia/Pacific with 5.6 percent and the OIC Africa with 2.5 percent (Table 3).

At the individual country level, the figures in Table 3 indicate that international tourist arrivals in the OIC region are still concentrated in few countries. In a descending order, Malaysia, Turkey, Saudi Arabia, Tunisia, Indonesia, Egypt, Morocco, United Arab Emirates, Bahrain, and Syria are found to be the main OIC international tourist destinations. This group of OIC countries hosted 63.6 million international tourist arrivals in 2002, corresponding to 81.1 percent share in the total OIC tourism market. During the period of 1990-2000, tourist arrivals in these countries as a group grew, on average, by 6.2 percent, a rate which is higher than the world average and the averages of the traditional tourist-receiving regions of Europe and the Americas.

3.2. International Tourism Receipts

The figures in Table 4 show that, in absolute terms, the trends in international tourism receipts in OIC countries and sub-regions followed, to a large extent, the trends in international tourist arrivals. In 2000, international tourism in the OIC countries, for which the data are available, generated US\$ 36.8 billion compared to US\$ 15 billion in 1990, corresponding to an average annual growth rate of 9.4 percent.

TABLE 4: OIC INTERNATIONAL TOURISM RECEIPTS BY REGION AND MAIN EARNERS

	Tourism Receipts (\$ billion)				Market Share (%)				Growth Rate (%)		
	1990	2000	2001	2002	1990	2000	2001	2002	90/00	00/01	01/02
World Total	264.1	477.2	463.7	474.3	100.0	100.0	100.0	100.0	6.1	-2.8	2.3
OIC Total	15.0	36.8	40.5	44.1	5.7	7.7	8.7	9.3	9.4	10.1	8.9
OIC Regions	Tourism Receipts (\$ billion)				Share in OIC Market				Growth Rate (%)		
Middle East	4.5	12.3	10.9	12.8	30.0	33.4	26.9	29.0	10.6	-11.4	17.4
Asia/Pacific	4.1	11.2	13.1	12.8	27.3	30.4	32.3	29.0	10.6	17.0	-2.3
Europe & C. Asia	3.5	8.5	11.0	13.2	23.3	23.1	27.2	29.9	9.3	29.4	20.0
Africa	2.9	4.7	5.4	5.2	19.3	12.8	13.3	11.8	4.9	14.9	-3.7
Americas	0.04	0.1	0.1	0.1	0.2	0.3	0.3	0.3	9.6	0.0	0.0
Main Earners	Tourism Receipts (\$ billion)				Share in OIC Market				Growth Rate (%)		
Turkey	3.2	7.6	10.1	11.9	21.3	20.7	24.9	27.0	9.0	32.9	17.8
Malaysia	1.7	4.6	6.4	6.8	11.3	12.5	15.8	15.4	10.5	39.1	6.2
Indonesia	2.1	5.7	5.4	4.3	14.0	15.5	13.3	9.8	10.5	-5.3	-20.4
Egypt	1.1	4.3	3.8	3.8	7.3	11.7	9.4	8.6	14.6	-11.6	0.0
Saudi Arabia	1.9	3.3	3.4	3.4	12.7	9.0	8.4	7.7	5.7	3.0	0.0
Morocco	1.3	2.0	2.6	2.6	8.7	5.4	6.4	5.9	4.4	30.0	0.0
Tunisia	0.9	1.5	1.6	1.6	6.0	4.1	4.0	3.6	5.2	6.7	0.0
Syria	0.3	1.1	-	1.4	2.0	3.0	-	3.2	13.9	-	-
U.A.E	0.3	1.0	1.1	1.3	2.0	2.7	2.7	2.9	12.8	10.0	18.2
Iran	0.1	0.5	0.9	1.2	0.7	1.4	2.2	2.7	17.5	80.0	33.3
Total	12.9	31.6	35.3	38.3	86.0	85.9	87.2	86.8	9.4	11.7	8.5

Source: Extracted from Table A.2 in the Annex.

Note: Due to rounding, the growth rates in this table slightly differ from those in Table A.2 in the Annex.

This rate was higher than the world average and the averages of the traditional tourist-receiving regions of Europe and the Americas during the same period. Yet, the share of the OIC countries in the world total international tourism receipts accounted for only 7.7 percent in 2000, an increase by 2 percentage point over their share in 1990.

In 2001, the 73.6 million international tourist arrivals hosted by the OIC countries generated US\$ 40.5 billion as tourism receipts, corresponding to an increase by 10.1 percent. Except the OIC sub-region of the Middle East which recorded a significant decline of 11.4 percent, all the OIC destinations recorded increases in their international tourism receipts, the highest of which was recorded by the OIC sub-region of Europe and central Asia (29.4 percent). The share of the OIC region in world international tourism receipts was, therefore, slightly increased by 1 percentage point over the year 2000. In 2002, international tourism receipts in the OIC countries, for which the data are available, amounted to US\$ 44.1 billion, corresponding to an increase by 8.9 percent over 2001 and 9.3 percent share in the world total international tourism receipts.

While, in absolute terms, the trends in international tourism receipts were generally similar to those in international tourist arrivals, the shares of OIC sub-regions and individual countries in total OIC international tourism receipts as well as the average growth rates of these receipts were somewhat different. This is due to the fact that receipts per arrival vary as each region and country has its own tourism characteristics in terms of the length of stay, purpose of visit, geographical distance, types of shopping, etc. The OIC average tourism receipts per arrival in 2002 amounted to US\$ 489. In the same year, the highest receipts per tourist arrival was recorded in the OIC sub-region of Americas (US\$ 1000), followed by the OIC Europe/Central Asia (US\$ 742), OIC Asia/Pacific (US\$ 607), OIC Middle East (US\$ 489) and OIC Africa (US\$ 406) (calculated using the data in Tables 3 and 4).

The OIC Middle East sub-region recorded the largest share of 33.4 percent in the total OIC international tourism receipts in 2000. In 2001, the OIC Asia/Pacific was at the top with 32.3 percent and, in 2002, the OIC Europe/Central Asia claimed the first place with 29.9 percent. However, in terms of the average growth rate of international tourism receipts in the period 1990-2000, the order of the performance of the

OIC sub-regions was as follows: the OIC Middle East and the OIC Asia/Pacific recorded the highest rate of 10.6 percent followed by the OIC Americas with 9.6 percent, the OIC Europe/Central Asia with 9.3 percent and the OIC Africa with 4.9 percent (Table 4).

As is the case in international tourist arrivals, the figures in Table 4 indicate that international tourism receipts in the OIC countries are also concentrated in few countries, almost the same countries of the main OIC tourist destinations. In a descending order, the main OIC international tourism earners are Turkey, Malaysia, Indonesia, Egypt, Saudi Arabia, Morocco, Tunisia, Syria, United Arab Emirates, and Iran. This group of OIC countries earned US\$ 38.3 billion as international tourism receipts in 2002, corresponding to 86.8 percent share in total OIC international tourism receipts. During the period of 1990-2000, international tourism receipts of these countries, as a group, grew on average by 9.4 percent per annum which is the same rate recorded by the total OIC countries in the same period.

3.3. The Economic Role of International Tourism in the OIC Countries

In this section, an attempt is made to assess the economic role of the international tourism sector in the OIC countries. This is made by calculating the balance of international tourism for each individual country for which the relevant data are available (i.e. by deducting the *International Tourism Expenditure*³ from the *International Tourism Receipts*). The net contribution of the international tourism sector to the economies of these countries is then evaluated by relating the balance of international tourism as percentage of the GNP of each country. The international tourism sector is also evaluated as a source of foreign exchange earnings by relating the international tourism receipts in each country, as percentage, to its total exports.

Table 5 displays the top 10 OIC countries in terms of their balance of international tourism in millions of US dollars. When compared with Tables 3 and 4 above, it is obvious that most of these countries constitute the main OIC international tourism destinations and earners. However, when we examine the economic role of the international

³ For a proper understanding of this term see explanatory note (2) under Table A.2 in the Annex.

tourism sector in the OIC countries in terms of its net contribution to the GNP of each country, the picture, as shown in Table 6, reflects a widely different situation.

TABLE 5: TOP 10 OIC COUNTRIES WITH RESPECT TO THEIR BALANCE OF INTERNATIONAL TOURISM (US\$ million)

	1998	1999	2000	2001	2002
Turkey	6055	3732	5925	8329	10021
Malaysia	404	1567	2487	3760	4167
Egypt	1417	2825	3272	2668	2486
Morocco	1288	1440	1614	2194	2202
Tunisia	1322	1264	1233	1341	1337
Indonesia	2229	2357	2552	1990	938
Syria	437	401	442	730	603
Jordan	420	440	335	280	370
Bahrain	224	306	349	380	363
Maldives	261	280	298	286	272

Source: Table A.3 in the Annex.

Table 6 lists the OIC countries, for which the relevant data are available, in a descending order, according to their balance of international tourism as average percentage of their GNP in the period 1998-2002. This is classified into 4 ranges, the highest of which includes records of 5 percent and above, and the lowest includes sub-zero records. The information in Table 6 indicates that, in general, the economic role of the international tourism sector in the OIC countries is neither a function of the size nor the level of affluence of the economy. In this regard, international tourism is found to be the main economic activity in Maldives, the only country with a very high contribution of international tourism to the GNP (50 percent).

TABLE 6: BALANCE OF INTERNATIONAL TOURISM AS PERCENTAGE OF GNP (Average 1998-2002)

(%)	Countries
5 ⁺	Maldives (50 %), Tunisia (6.6%), Morocco (5%)
1 - 4.9	Bahrain (4.7), Jordan (4.5%), Turkey, Albania, Syria, Malaysia, Guyana, Egypt, Benin, Senegal, Indonesia, Mali (1.3%)
0.1 - 0.9	Sierra Leone (0.6%), Uganda, Togo, Niger, Kyrgyz Rep. (0.4%)
(-) - 0.0	Guinea (-0.1%), Iran, Algeria, Bangladesh, Kazakhstan, Yemen, Sudan, Suriname, Pakistan, Libya, Azerbaijan, Côte d'Ivoire, Oman, Gabon, Nigeria, Mauritania, Mozambique, Kuwait (-7.2%)

Source: Table A.4 in the Annex.

In addition, the information in Table 6 indicates that international tourism activity plays a relatively important role compared to the size of the economy in some OIC countries for which the balance of international tourism accounts, on average, for 1 to almost 7 percent of their GNP. This group includes most of the OIC main tourism destination and earner countries (e.g., Tunisia, Morocco, Bahrain, Jordan, Turkey, Syria, Malaysia, Egypt, Indonesia, etc.). In contrast, international tourism activity is found to have a negligible or even negative role in the economies of many OIC countries for which the data are available (18 countries recorded, on average, a deficit in their balance of international tourism during the period 1998-2002).

However, the information in Table 7, which lists the OIC countries in a descending order according to their international tourism receipts as percentage of their exports, indicates that international tourism activity in these countries plays a more significant role as a source of foreign exchange earnings.

TABLE 7: INTERNATIONAL TOURISM RECEIPTS AS PERCENTAGE OF EXPORTS (Average 1998-2002)

(%)	Countries
50 +	Maldives (274.3%), Comoros (143.1%), Lebanon (111.5%), Albania (109.2%), Egypt (81.1%)
25 – 49.9	Jordan (48.6%), Mozambique, Mali, Uganda, Benin, Morocco, Turkey, Syria (27.2%)
10 – 24.9	Tunisia (24.1%), Palestine, Chad, Burkina Faso, Senegal, Niger, Guyana (10.6%)
5 – 9.9	Indonesia (9%), Azerbaijan, Bahrain, Kazakhstan, Malaysia (5.2%)
0.1 - 4.9	Saudi Arabia (4.9%), Mauritania, Uzbekistan, Togo, Kyrgyz Rep., Iran, U.A.E., Sudan, Yemen, Guinea, Oman, Côte d'Ivoire, Suriname, Nigeria, Bangladesh, Pakistan, Kuwait, Algeria, Gabon, Libya (0.6%)

Source: Table A.5 in the Annex.

During the period 1998-2002, international tourism activity generated, on average, foreign exchange earnings of 2.7 times those generated by exports in Maldives and almost 1.5 times the value of exports in Comoros. In the same period, international tourism receipts accounted, on average, for 111.5 percent of the total exports in Lebanon, 109.2 percent in Albania, and 81.1 percent in Egypt. Moreover, international tourism receipts accounted for between 25 and 49.9 percent of the value of exports of 8 countries. They also accounted for between 10 and 24.9

percent of the value of exports of 7 countries and between 5 and 9.9 percent in other 5 countries. Yet, international tourism still plays a limited role in generating foreign exchange earnings in 20 OIC countries, i.e. those countries for which international tourism receipts accounted for less than 5 percent of their exports (Table 7).

4. TOURISM DEVELOPMENT IN THE OIC COUNTRIES: PROSPECTS AND CHALLENGES

Recently, international tourism activity had an essential contribution and important role in the economic development of many developing countries including some OIC countries. In many of these countries, tourism has shown itself to be a highly labour-intensive activity that opens up opportunities for different businesses that are engaged in or provide products and services to the tourism industry. In these countries, tourism constitutes a substantial ground for private initiative that creates jobs in small and medium-sized enterprises as well as work for the self-employed. In particular, international tourism activity has become the main source of foreign exchange revenues for the 49 LDCs around the world, not counting the oil industry, which is concentrated in only three of these countries (Angola, Yemen and Equatorial Guinea).

Over the past decade, some OIC countries experienced strong growth in their international tourism receipts, which demonstrates the existence of a competitive advantage in their favour. In particular, the international tourism receipts of the OIC LDCs have almost doubled between 1990 and 2000. In many of these countries, international tourism serves as a foothold from which the local market can expand and flourish. It creates jobs for the poor, for unskilled as well as highly skilled workers, jobs for women and indigenous communities in isolated rural areas, particularly in handicrafts and in ecotourism. International tourism has, therefore, become one of the main components of these countries' GDP, or, in some cases (e.g. Maldives), the largest one.

In some least developed countries, tourism development represents one of the few options they have to diversify their economy and to replace a declining traditional agriculture. In this context, a crucial contribution of tourism-generated foreign exchange revenues to the balance of payments has been observed in many OIC countries. Such revenues, particularly in the OIC LDCs, reduce the country's foreign debt and its dependence on

a single export sector (in most cases primary commodities with low and fluctuating international prices). It is, therefore, possible to substantially build on the result that tourism can play a major role in improving the standard of living of people in these countries and help them lift themselves above the poverty threshold. This was the conclusion of the 3rd UN Conference on the LDCs held in Brussels in May 2001 which considered tourism as an instrument for poverty alleviation.

Given their significant and diverse natural, geographical, historical and cultural heritage assets, the OIC countries have, in fact, a vast potential for the development of a sustainable international tourism sector. However, considering their modest share in the world tourism market and the concentration of tourism activity in a small number of countries, it seems that a large part of this inherent tourism potential remains unutilised. The desirable levels of tourism development in many OIC countries and in the OIC region as a whole are not yet achieved. Therefore, although it is a crucial factor, the potential of inherent natural tourism resources, unless it is properly planned and managed, cannot by itself make a successful tourism industry.

The problems facing tourism and the development of a sustainable international tourism sector in the OIC countries are diverse as each country has its own tourism features, level of development, and national development priorities and policies. Yet, in the case of many OIC countries, these problems can be summarised, *inter alia*, as follows:

- *Lack of technical know-how and weak promotional activity.* Despite the fundamental awareness and the basic cognisance of the economic importance of tourism as an industry and its positive impact as a potential source of foreign exchange earnings and employment, in many cases there is generally a lack of tourism knowledge and professionals. This is often accompanied by the absence or weak publicity promotion and mass media exposure due, in many cases, to the limited communication systems and technological services.
- *Lack of tourism-related infrastructures.* Many OIC countries lack the sufficient infrastructures necessary for the development of a sustainable tourism industry. Primary amongst these are hotels and lodging services, transportation and communication, and tourism information services. This makes it difficult to provide the

international standards of facilities and services which tourists require.

- *Lack of tourism investments.* While investment in services is a well-established economic activity in the developed countries, it is still lagging behind in developing ones. Investment in service-oriented projects, particularly in tourism, is often regarded, in most developing countries, as a high-risk task. Accordingly, though they may have natural tourism potential, it is very difficult for many poor and least developed OIC countries to gain access to reasonable financing for their tourism projects even when they manage to tackle the problems of project identification and planning.
- *Lack of consistent tourism strategies and policies.* In many OIC countries, there are still difficulties in getting integrated tourism policy-making due in general to policy conflicts between the government departments and the tourism private agencies. This is often coupled in many cases with the lack of effective administration, regulation and institutional frameworks of tourism activity.
- *Lack of tourism diversification.* Modern international tourism activity has shown a growing tendency towards diversification and change. This makes it difficult for many OIC countries, including those with a relatively developed tourism sector, to keep pace with the rapidly changing and complex requirements of international tourists. In a highly competitive international tourism market, and considering the emergence of new tourism destinations, improvement of the conditions that foster modern tourism development is not an easy process.
- *Lack of tourism safety.* The safety of tourists is a primary factor for any successful tourism industry and, therefore, should be one of the basic objectives of tourism planning and management. Safety-related tourism problems, whether real or perceived, exert a negative impact on the reputation of the host countries. In this regard, negative perceptions and political instability appear to play a detrimental role in the prospects of tourism in many OIC countries. Even such factors as rumors may cause great damage to complete tourist seasons.

In spite of these problems and the modest share of the OIC countries in the world tourism market, there still is a wide scope for the development

of a sustainable international tourism industry in these countries. Overall, this necessitates an adoption of articulate long-term strategies as well as medium to short-term plans and programs at the national level that would be accompanied by a process of creating a supportive OIC co-operation environment at the regional level.

In this context, a set of recommendations can be proposed, at the national level, to serve as policy guidelines to which the attention of the member countries needs to be drawn. These recommendations may, *inter alia*, include the following:

- Objectives and programs of action for sustainable tourism development are to be outlined specifically in the national development plans and strategies and formulated in consultation with the relevant private sector stakeholders. These objectives and programmes should be focused on the promotion of economic, social, cultural, and environmental incentives of tourism.
- The focus of sustainable development and management of tourism should be on strengthening the national capacity building, particularly national tourism administrations through developing new resources and facilities as well as raising public awareness of inherent natural and cultural tourism resources of the country.
- Based on international standards, efforts should be made towards sustainable physical planning and strengthening of tourism destinations, in general, and ecotourism products, in particular, in order to preserve the environmental and cultural quality of these destinations.
- Improving the quality and efficiency of the basic tourism-related infrastructures and services such as hotels, roads, public amenities, transportation and communication, tourism information, and visa regulations to provide world-class services to visitors and tourists. In this regard, efforts should be made to promote synergies between transport and tourism policies, with particular reference to air transport.
- As an activity that symbolises free movement, international tourism has everything to gain from the greatest possible liberalisation of trade in services related to it. In this context, efforts should be made

to secure greater facilitation of border movements for visitors and to increase national capacities to use relevant elements of the multilateral trade framework in this regard.

- Tourism is a business and primarily an area for private sector activity. Thus, efforts should be made to encourage and promote extensive private sector involvement in tourism development. In this regard, endeavours should be made to strengthening public-private sector cooperation with a view to establishing policies, strategies and regulations relative to sustainable tourism development. In particular, efforts should be made to encourage private sector investment in tourism projects and establishing joint ventures particularly in the areas of capacity building and improving the quality of tourism services.
- Diversifying tourism products by the inclusion of socio-cultural programs and traditional activities involving local communities. In this regard, efforts should be made to improve planning, management and marketing of ecotourism, not only as a sector with a great potential for economic development—especially in remote areas where few other possibilities exist—but also as a significant tool for conservation of the natural environment.
- Developing and raising tourism-oriented education. This will help change people perceptions regarding tourism and raise their awareness of the opportunities and challenges involved in tourism. This should be accompanied by making efficient use of the mass media and other promotional facilities to publicise and promote existing attractions and available resources.
- Providing training and education programs on different aspects of tourism, particularly to the people and personnel directly engaged in tourism activities. These should cover a broad range of subjects such as foreign languages, business and tourism techniques, the environmental and socio-cultural impacts of tourism, history, culture, local and national flora and fauna, etc.
- To facilitate these programs, actions must be taken to provide local communities with financial and technical backing and to develop entrepreneurial capacities and managerial skills, especially in small

and medium-sized enterprises, in order to improve the competitiveness of tourism products and services.

- Efforts should be made to find and obtain access to funding for tourism projects through improving and optimising a broad range of funding resources, including the public and private sectors. Efforts should also be made to seek external resources of relative international foundations, such as the special program of the International Finance Corporation (IFC) which is developed by the World Bank for tourism development. These and other sources would help countries in identifying, planning and funding their national tourism activities.

5. MEANS AND MODALITIES FOR STRENGTHENING OIC COOPERATION IN THE FIELD OF TOURISM

5.1. Tourism in the OIC Cooperation Activities: Overview

The issue of tourism was first referred to during the 7th Islamic Summit held in Casablanca in 1994, which stressed on the importance of Inter-Islamic cooperation in the field of tourism. The 23rd Islamic Conference of Foreign Ministers (ICFM) held in Conakry in 1995 invited the Member States to cooperate in the following areas:

- Provision and exchange of publicity and advertising materials on tourism in different languages;
- Organising special tourism and gastronomy weeks and popular art exhibitions in the Member States;
- Production and exchange of documentary films on main archeological landmarks in the Member States;
- Organising group travel among Member States to strengthen bonds among their people;
- Encouraging tourism investment in Member States and directing investors to realise tourism projects in these states;
- Facilitating contacts among experienced tourism offices in Member States.
- Facilitating the establishment of data network and electronic exchange of information on tourism and related services in OIC Member States (added latter by the 9th Islamic Summit held in Doha in November 2000).

While these areas of cooperation in tourism have been reiterated in all the resolutions adopted on tourism by the succeeding ICFMs, tourism has recently assumed greater importance on the agenda of the OIC. In this context, three ministerial conferences on tourism were held within the short period of 2000-2002.

The 1st Islamic Conference of Ministers of Tourism held in Isfahan in October 2000. The Conference adopted the “Isfahan Declaration” in which member countries decided, among other things, to boost cooperation in tourism through the promotion of public awareness, education, training, investment opportunities and involvement of private sectors.

The 2nd Islamic Conference of Ministers of Tourism held in Kuala Lumpur in October 2001. The Conference adopted a Resolution on Tourism Development and, in order to achieve the goals set forth in the Isfahan Declaration, it also adopted the Kuala Lumpur Program of Action for the Development and Promotion of Tourism among the OIC Member States. The Program identified three possible areas of cooperation in tourism, namely *Tourism Facilitation*, *Tourism Marketing* and *Research and Training*.

Lastly, the 3rd Islamic Conference of Ministers of Tourism, which was held in Riyadh in October 2002, adopted a Resolution on Tourism Development and the Riyadh Declaration.

In the light of the above-mentioned resolutions and declarations and within the framework of the OIC Plan of Action, the following section proposes certain means/modalities for strengthening cooperation among the member countries in this important field. This is mainly made through elaborating on the broad objectives and programmes of action defined under the chapter of ‘Tourism’ in the OIC Plan of Action.

5.2. Tourism in the OIC Plan of Action: Means/Modalities for Strengthening Cooperation

Tourism has been identified as one of the ten priority areas of cooperation in the Plan of Action to Strengthen Economic and Commercial Co-operation among the Member Countries of the OIC⁴.

⁴ This is the revised Plan. The original Plan was adopted by the 3rd Islamic Summit held in Makkah Al-Mukaramah/Taif in January 1981. The Plan sought to bring under

This Plan was adopted at the 10th Session of the Standing Committee for Economic and Commercial Cooperation (COMCEC) in October 1994 and subsequently endorsed by the 7th Islamic Summit held in Casablanca in December 1994. The Summit also endorsed a Mechanism of Follow-up and Implementation as an integral part of the Plan.

As major 'Objectives' of cooperation in the area of tourism, the OIC Plan of Action seeks to:

1. *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 civilisation and culture, to the rest of the world.*
2. *Support and develop joint action, at the bilateral and multilateral levels, to strengthen, promote and expand tourist activities among the member countries, and in the Islamic world in general.*
3. *Formulate co-ordinated 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 tourist activities.*
4. *Develop modalities of co-operation 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 co-ordination in tourism, through joint ventures, in the area of improvement and enhancement of physical capacities and quality service.*

In order to achieve these broad objectives, the Plan identifies, in a general manner, some indicative activities under the heading

its purview diverse economic activities of the OIC giving them new impetus and direction. By the end of the eighties a need was felt to revise the Plan taking into account the changes in the world economic scenario and in the economies of the Member States.

“Programmes of Action”. Together with the above-mentioned ‘Objectives’, the ‘Programmes of Action’ serve as a source of a wide range of means and modalities to strengthen cooperation among the member countries in this field.

In this context, specific means/modalities can be proposed under each item of the ‘Programmes of Action’ as follows:

1. *Increasing the public awareness in the OIC countries about the existing 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.*
 - 1.1. Producing joint TV programs and promotional materials on tourism like brochures, posters and guidebooks by the relevant national authorities in the member countries. Making these materials available in the member countries as well as in the other countries around the world in order to promote the cultural heritage and the diversity and landmarks of the OIC countries at regional and international levels.
 - 1.2. Developing and applying scientific methods of joint tourism marketing and advertisement supported by tools that have a major impact on consumers, e.g. the Internet. In this context, efforts should be made to facilitate the establishment of data network on tourism and related services in the OIC countries.
 - 1.3. Developing tourism web-sites in the member countries for the dissemination of information on tourism, particularly regarding their natural, historical, and cultural heritage tourism resources.
 - 1.4. Organising Islamic tourism fairs and popular art exhibitions and cultural festivals on a regular basis in the member countries.
 - 1.5. Organising special tourism weeks and group travel among the member countries along with the production and publication of Tourism Best Practices in OIC countries.
2. *Establishment of direct contacts among the relevant parties concerned with tourism in the member countries on promotion of*

tourism in the sub-regions, regions and the whole of the Islamic world.

- 2.1. Encouraging the establishment of alliances between tourism stakeholders in OIC countries, particularly the official tourism promotion bodies, with a view to strengthening tourism marketing and promoting cooperation efforts at the sub-regions level as well as at the level of the OIC region as a whole.
 - 2.2. Establishing and facilitating linkages in air, land/rail and sea transportation with a view to easing access from one destination to another within the OIC region.
 - 2.3. Establishing alliances among the airlines of the OIC countries with the possibility of having an open-sky policy and direct flights between their capitals and major cities.
 - 2.4. Expanding cooperation efforts among the aviation companies in the OIC countries with a view to making maximum profit from the inter-OIC aviation network through, inter alia, organising extra flights among OIC countries with encouraging prices for tourists during various tourism seasons.
 - 2.5. Equipping and mobilising aero-navigation of the OIC countries, establishing air-transport joint companies, and offering a discount on airport taxes and services on a reciprocal basis 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.*
 - 3.1. Easing entry and movement of tourists among the OIC countries and enhancing intra-OIC tourism through, inter alia, simplifying visa and other legal and administrative travel procedures.
 - 3.2. Establishing a legal framework towards concluding of an agreement on visa arrangement among the OIC countries. In this context, waiving of the visa requirement or otherwise expediting the visa issuing process, including the possibility of issuance of

electronic or joint visa, are important procedures that should be seriously considered.

- 3.3. Encouraging efforts to conduct bilateral and multilateral air, road/rail and sea Passengers Transport Treaties among OIC countries.
- 3.4. Granting preferential treatments and making special arrangements to facilitate customs formalities and immigration procedures such as discounts and reduction of tariffs and other charges levied on tourists travelling among OIC 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.*
 - 4.1. Encouraging public and private joint venture investments in tourism projects through providing special facilities and preferential treatments for investors from the OIC countries in the form of project assistance, concessionary finance, and technology and profit transfers.
 - 4.2. Encouraging joint investment projects of renewing and modernising tourism-related infrastructures and services, such as hotels, road, rail and sea networks transportation in the OIC countries and linking them to each other within the OIC region.
 - 4.3. Developing joint dissemination and exchange of information on tourism investment opportunities in the OIC countries through, for example, the joint production of handbooks and/or guidelines on investment in the OIC countries.
 - 4.4. Initiation of periodic consultative fora among the representatives of the private enterprises in the area of tourism in the member countries in order to facilitate the exchange of views and experiences on the prevalent problems in the tourism sector in the OIC region.
5. *Encouraging and supporting 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.

- 5.1. Encouraging the establishment, upgrading and expansion of the technical and vocational training institutions in the area of tourism in the OIC countries to be able to meet the continuously expanding skilled manpower requirements in the field of tourism.
- 5.2. Encouraging joint development and exchange of training programs and courses on human resource development in the field of tourism to ensure tourism occupational skills of international standards in the OIC countries.
- 5.3. Holding joint training-vocational courses, workshops, seminars and conferences on the tourism industry by the relevant training institutes in the OIC countries.
- 5.4. Establishing linkages or networks among tourism training institutions in the OIC countries and facilitating exchange of experts and research on tourism development.

6. CONCLUSION

The strong and sustainable expansion of international tourism activity over the past five decades is one of the most remarkable economic phenomena of our time. Tourism comprises all socio-economic activities that are directly or indirectly involved in providing services to tourists. Defined by such an impressive network of businesses and services and by the infrastructure needed to support it, tourism is one of the world's largest industries involving a wide range of stakeholders. The revenues generated by international tourism activity (excluding revenues of international transportation and revenues from domestic tourism) have grown by an average annual growth rate of 11 percent over the past five decades. This rate of growth far outstrips that of the world economy as a whole. International tourism receipts reached \$477 billion in 2000, making it one of the largest categories of international trade; it equals or exceeds that of oil and petroleum product exports, or that of cars and transport equipment. These revealing figures reflect clearly the important role that international tourism already plays in the world economy.

Although recent trends in international tourism indicate that tourism activity is still concentrated in the developed regions of Europe and the Americas, a substantial proliferation of new tourism destinations is also observed in the developing regions. Particularly, the market share in world international tourism has been increasing for Asia and the Pacific, the Middle East, and Africa. For many countries in these regions, international tourism is now considered as an important source of foreign exchange earnings and employment. Therefore, tourism has been given much attention in the national development strategies of many developing countries and recently placed on the agenda of many international conferences on sustainable development. To fail to include tourism in these strategies is to overlook the fact that it presents the biggest and, undoubtedly, the most diversified and creative economic activity of all.

As a substantial part of the developing countries and considering their rich and diverse natural, geographical, historical and cultural heritage assets, the OIC countries have, in fact, a high potential for the development of a sustainable international tourism sector. Yet, considering their modest share in the world tourism market and the concentration of international tourism activity in a small number of countries, it seems that a large part of their inherent tourism potential remains unutilised. The desirable levels of tourism development in many OIC countries and in the OIC region as a whole are not yet achieved. Therefore, although it is a crucial factor, the potential of inherent natural tourism resources, unless it is properly planned and managed, cannot by itself make a successful tourism industry.

The problems facing tourism and the development of a sustainable international tourism sector in the OIC countries are diverse as each country has its own tourism features, level of development, and national priorities and policies. These problems range, in the case of many OIC countries, from the lack of technical know-how and weak promotional and public awareness to the insufficient tourism-related infrastructures and investments, and the lack of tourism diversification and safety. However, in spite of these problems, it is believed that there still is a wide scope for the development of a sustainable international tourism industry in the OIC countries. Overall, this requires an adoption of long-term strategies as well as medium to short-term plans and programs at both the national and regional levels along with a process of creating a supportive OIC cooperation and coordination environment.

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ANNEX

TABLE A.1: INTERNATIONAL TOURIST ARRIVALS IN OIC REGIONS AND COUNTRIES

	Tourist Arrivals (Thousands)						Growth Rate (Annual % Change)					
	1990	1995	1999	2000	2001	2002	1990/95	1995/00	1990/00	1999/00	2000/01	2001/02
Africa	9897	9395	12179	12684	13116	12820	-1.0	6.2	2.5	4.1	3.4	-2.3
Algeria	1137	520	749	866	901	988	-14.5	10.7	-2.7	15.6	4.0	9.7
Benin	110	138	80	96	88	72	4.6	-7.0	-1.4	20.0	-8.3	-18.2
Burkina Faso	74	124	117	126	128	149	10.9	0.3	5.5	7.7	1.6	16.4
Cameroon	89	101	262	277	221	-	2.6	22.4	12.0	5.7	-20.2	-
Chad	9	19	47	43	57	32	16.1	17.7	16.9	-8.5	32.6	-43.9
Comoros	8	23	24	24	19	19	23.5	0.9	11.6	0.0	-20.8	0.0
Côte d'Ivoire	196	230	301	-	-	-	3.3	-	-	-	-	-
Djibouti	33	20	21	-	-	-	-9.5	-	-	-	-	-
Gabon	109	125	178	155	169	208	2.8	4.4	3.6	-12.9	9.0	23.1
Gambia	100	45	96	79	75	79	-14.8	11.9	-2.3	-17.7	-5.1	5.3
Guinea	-	-	27	33	38	43	-	-	-	22.2	15.2	13.2
Mali	44	43	83	86	89	96	-0.5	14.9	6.9	3.6	3.5	7.9
Mauritania	-	-	24	30	-	-	-	-	-	25.0	-	-
Morocco	4024	2602	3817	4240	4342	4303	-8.4	10.3	0.5	11.1	2.4	-0.9
Niger	21	35	44	50	53	58	10.8	7.4	9.1	13.6	6.0	9.4
Nigeria	190	656	776	813	850	887	28.1	4.4	15.6	4.8	4.6	4.4
Senegal	246	280	369	389	396	427	2.6	6.8	4.7	5.4	1.8	7.8
Sierra Leone	98	38	11	16	24	28	-17.3	-15.9	-16.6	45.5	50.0	16.7
Sudan	33	63	39	38	50	55	13.8	-9.6	1.4	-2.6	31.6	10.0
Togo	103	53	93	72	74	58	-12.4	6.3	-3.5	-22.6	2.8	-21.6
Tunisia	3204	4120	4832	5058	5337	5064	5.2	4.2	4.7	4.7	5.5	-5.1
Uganda	69	160	189	193	205	254	18.3	3.8	10.8	2.1	6.2	23.9

TABLE A.1: INTERNATIONAL TOURIST ARRIVALS IN OIC REGIONS AND COUNTRIES (CONTINUED)

	Tourist Arrivals (Thousands)						Growth Rate (Annual % Change)					
	1990	1995	1999	2000	2001	2002	1990/95	1995/00	1990/00	1999/00	2000/01	2001/02
Americas	110	149	138	163	99	104	6.3	1.8	4.0	18.1	-39.3	5.1
Guyana	64	106	75	105	99	104	10.6	-0.2	5.1	40.0	-5.7	5.1
Suriname	46	43	63	58	-	-	-1.3	6.2	2.3	-7.9	-	-
Asia/Pacific	10889	13592	15982	18835	20499	21100	4.5	6.7	5.6	17.9	8.8	2.9
Bangladesh	115	156	173	199	207	207	6.3	5.0	5.6	15.0	4.0	0.0
Brunei	377	498	967	984	-	-	5.7	14.6	10.1	1.8	-	-
Indonesia	2178	4324	4728	5064	5154	5033	14.7	3.2	8.8	7.1	1.8	-2.3
Iran	154	452	1321	1342	1402	1585	24.0	24.3	24.2	1.6	4.5	13.1
Malaysia	7446	7469	7931	10222	12775	13292	0.1	6.5	3.2	28.9	25.0	4.0
Maldives	195	315	430	467	461	485	10.1	8.2	9.1	8.6	-1.3	5.2
Pakistan	424	378	432	557	500	498	-2.3	8.1	2.8	28.9	-10.2	-0.4
Europe/C. Asia	5419	8187	10526	13193	16830	18246	8.6	10.0	9.3	25.3	27.6	8.4
Albania	30	40	26	32	34	-	5.9	-4.4	0.6	23.1	6.3	-
Azerbaijan	-	210	602	681	767	834	-	26.5	-	13.1	12.6	8.7
Kazakhstan	-	-	394	1683	3961	3678	-	-	-	327.2	135.4	-7.1
Kyrgyz Rep.	-	36	48	59	99	140	-	10.4	-	22.9	67.8	41.4
Tajikistan	-	-	5	8	5	6	-	-	-	60.0	-37.5	20.0
Turkey	5389	7727	8964	10428	11619	13256	7.5	6.2	6.8	16.3	11.4	14.1
Uzbekistan	-	174	487	302	345	332	-	11.7	-	-38.0	14.2	-3.8
Middle East	9299	13066	20789	22984	23049	26224	7.0	12.0	9.5	10.6	0.3	13.8
Bahrain	1376	1396	2019	2420	2788	3167	0.3	11.6	5.8	19.9	15.2	13.6
Egypt	2411	2871	4490	5116	4357	4906	3.6	12.2	7.8	13.9	-14.8	12.6
Iraq	748	61	30	78	127	-	-39.4	5.0	-20.2	160.0	62.8	-
Jordan	572	1074	1358	1427	1478	1622	13.4	5.8	9.6	5.1	3.6	9.7
Kuwait	15	69	84	78	73	-	35.7	2.5	17.9	-7.1	-6.4	-
Lebanon	-	450	673	742	837	956	-	10.5	-	10.3	12.8	14.2

TABLE A.1: INTERNATIONAL TOURIST ARRIVALS IN OIC REGIONS AND COUNTRIES (CONTINUED)

	Tourist Arrivals (Thousands)						Growth Rate (Annual % Change)					
	1990	1995	1999	2000	2001	2002	1990/95	1995/00	1990/00	1999/00	2000/01	2001/02
Libya	96	56	178	174	169	135	-10.2	25.5	6.1	-2.2	-2.9	-20.1
Oman	149	279	503	571	829	817	13.4	15.4	14.4	13.5	45.2	-1.4
Palestine	-	-	271	330	60	7	-	-	-	21.8	-81.8	-88.3
Qatar	136	294	51	67	76	-	16.7	-25.6	-6.8	31.4	13.4	-
Saudi Arabia	2209	3325	6295	6585	6727	7511	8.5	14.6	11.5	4.6	2.2	11.7
Syria	562	815	1386	1416	1318	1658	7.7	11.7	9.7	2.2	-6.9	25.8
U.A.E	973	2315	3393	3907	4134	5445	18.9	11.0	14.9	15.1	5.8	31.7
Yemen	52	61	58	73	76	-	3.2	3.7	3.5	25.9	4.1	-
OIC Total	35614	44389	59614	67859	73593	78494	4.5	8.9	6.7	13.8	8.4	6.7
World Total	455900	550400	652300	687300	684100	702600	3.8	4.5	4.2	5.4	-0.5	2.7
OIC as % of World	7.8	8.1	9.1	9.9	10.8	11.2						

Source: World Tourism Organisation, "Tourism Market Trends 2002", "Compendium of Tourism Statistics, 2004 Edition", "Tourism Highlights, 2003 Edition".

Notes:

(1) *International Tourist Arrivals*: For a proper understanding of this term, two considerations should be taken into account. First, a *tourist* means a visitor who stays at least one night in a collective or private accommodation in the country visited (overnight visitors). Second, *arrivals* do not refer to the number of persons travelling, but rather to the number of arrivals (visits) in a destination; same-day visitors are not included.

(-) Data are not available.

TABLE A.2: INTERNATIONAL TOURISM RECEIPTS IN OIC REGIONS AND COUNTRIES

	Tourism Receipts (US \$ million)						Growth Rate (Annual % Change)					
	1990	1995	1999	2000	2001	2002	1990/95	1995/00	1990/00	1999/00	2000/01	2001/02
Africa	2862	3359	4559	4667	5386	5220	3.3	6.8	5.0	2.4	15.4	-3.1
Algeria	64	32	80	96	100	133	-12.9	24.6	4.1	20.0	4.2	33.0
Benin	28	27	94	77	73	60	-0.7	23.3	10.6	-18.1	-5.2	-17.8
Burkina Faso	11	25	32	29	35	39	17.8	3.0	10.2	-9.4	20.7	11.4
Cameroon	53	36	-	39	-	-	-7.4	1.6	-3.0	-	-	-
Chad	8	10	15	23	-	-	4.6	18.1	11.1	53.3	-	-
Comoros	2	21	19	15	9	11	60.0	-6.5	22.3	-21.1	-40.0	22.2
Côte d'Ivoire	51	89	100	49	48	-	11.8	-11.3	-0.4	-51.0	-2.0	-
Djibouti	6	4	-	-	-	-	-7.8	-	-	-	-	-
Gabon	3	7	15	17	17	-	18.5	19.4	18.9	13.3	0.0	-
Gambia	26	23	49	-	-	-	-2.4	-	-	-	-	-
Guinea	30	6	7	12	14	43	-27.5	14.9	-8.8	71.4	16.7	207.1
Mali	47	25	77	71	117	-	-11.9	23.2	4.2	-7.8	64.8	-
Mauritania	9	11	28	-	-	-	4.1	-	-	-	-	-
Morocco	1259	1304	1880	2039	2583	2646	0.7	9.4	4.9	8.5	26.7	2.4
Mozambique	-	-	156	186	134	144	-	-	-	19.2	-28.0	7.5
Niger	17	15	26	28	32	28	-2.5	13.3	5.1	7.7	14.3	-12.5
Nigeria	25	54	171	200	232	263	16.7	29.9	23.1	17.0	16.0	13.4
Senegal	167	161	166	140	148	-	-0.7	-2.8	-1.7	-15.7	5.7	-
Sierra Leone	19	6	8	-	-	-	-20.6	-	-	-	-	-
Sudan	21	19	22	30	56	62	-2.0	9.6	3.6	36.4	86.7	10.7
Togo	58	13	9	7	11	9	-25.9	-11.6	-19.1	-22.2	57.1	-18.2
Tunisia	948	1393	1503	1496	1614	1597	8.0	1.4	4.7	-0.5	7.9	-1.1
Uganda	10	78	102	113	163	185	50.8	7.7	27.4	10.8	44.2	13.5

TABLE A.2: INTERNATIONAL TOURISM RECEIPTS IN OIC REGIONS AND COUNTRIES (CONTINUED)

	Tourism Receipts (US \$ million)						Growth Rate (Annual % Change)					
	1990	1995	1999	2000	2001	2002	1990/95	1995/00	1990/00	1999/00	2000/01	2001/02
Americas	38	99	115	91	75	52	21.1	-1.7	9.1	-20.9	-17.6	-30.7
Guyana	27	78	106	75	61	49	23.6	-0.8	10.8	-29.2	-18.7	-19.7
Suriname	11	21	9	16	14	3	13.8	-5.3	3.8	77.8	-12.5	-78.6
Asia/Pacific	4124	9713	8795	11233	13128	12820	18.7	3.0	10.5	27.7	16.9	-2.3
Bangladesh	11	23	50	50	48	57	15.9	16.8	16.3	0.0	-4.0	18.8
Brunei	35	37	-	-	-	-	1.1	-	-	-	-	-
Indonesia	2105	5229	4710	5749	5396	4306	20.0	1.9	10.6	22.1	-6.1	-20.2
Iran	61	190	403	467	891	1249	25.5	19.7	22.6	15.9	90.8	40.2
Malaysia	1667	3909	3242	4562	6374	6785	18.6	3.1	10.6	40.7	39.7	6.4
Maldives	89	211	314	321	327	318	18.8	8.8	13.7	2.2	1.9	-2.8
Pakistan	156	114	76	84	92	105	-6.1	-5.9	-6.0	10.5	9.5	14.1
Europe/C. Asia	3457	5234	5974.7	8523.2	11048.8	13167	8.6	10.2	9.4	42.7	29.6	19.2
Albania	4	65	211	389	446	487	74.7	43.0	58.0	84.4	14.7	9.2
Azerbaijan	228	70	81	63	43	51	-21.0	-2.1	-12.1	-22.2	-31.7	18.6
Kazakhstan	-	122	363	356	396	622	-	23.9	-	-1.9	11.2	57.1
Kyrgyz Rep.	-	5	14	15	24	36	-	24.6	-	7.1	60.0	50.0
Tajikistan	-	-	0.7	1.2	0.8	2	-	-	-	71.4	-33.3	150.0
Turkey	3225	4957	5203	7636	10067	11901	9.0	9.0	9.0	46.8	31.8	18.2
Uzbekistan	-	15	102	63	72	68	-	33.2	-	-38.2	14.3	-5.6
Middle East	4548	7755	10687	12334	10895	12835	11.3	9.7	10.5	15.4	-11.7	17.8
Bahrain	135	247	518	573	630	741	12.8	18.3	15.6	10.6	9.9	17.6
Egypt	1100	2684	3903	4345	3800	3764	19.5	10.1	14.7	11.3	-12.5	-0.9
Iraq	55	13	-	-	-	-	-25.1	-	-	-	-	-
Jordan	512	652	795	722	700	786	5.0	2.1	3.5	-9.2	-3.0	12.3
Kuwait	132	121	92	98	104	119	-1.7	-4.1	-2.9	6.5	6.1	14.4
Lebanon	-	710	673	742	837	956	-	0.9	-	10.3	12.8	14.2

TABLE A.2: INTERNATIONAL TOURISM RECEIPTS IN OIC REGIONS AND COUNTRIES (CONTINUED)

	Tourism Receipts (US \$ million)						Growth Rate (Annual % Change)					
	1990	1995	1999	2000	2001	2002	1990/95	1995/00	1990/00	1999/00	2000/01	2001/02
Libya	6	6	28	97	94	75	0.0	74.5	32.1	246.4	-3.1	-20.2
Oman	69	92	106	120	204	242	5.9	5.5	5.7	13.2	70.0	18.6
Palestine	-	-	132	155	9	-	-	-	-	17.4	-94.2	-
Saudi Arabia	1884	1210	2455	3312	3415	3420	-8.5	22.3	5.8	34.9	3.1	0.1
Syria	320	1338	1031	1082		1366	33.1	-4.2	13.0	4.9	-	-
U.A.E	315	632	893	1012	1064	1328	14.9	9.9	12.4	13.3	5.1	24.8
Yemen	20	50	61	76	38	38	20.1	8.7	14.3	24.6	-50.0	0.0
OIC Total	15029	26160	30130.7	36848.2	40532.8	44094	11.7	7.1	9.4	22.3	10.0	8.8
World Total	264100	405300	457200	477200	463700	474300	8.9	3.3	6.1	4.4	-2.8	2.3
OIC as % of World	5.7	6.5	6.6	7.7	8.7	9.3						

Source: World Tourism Organisation, "Tourism Market Trends 2002", "Compendium of Tourism Statistics, 2004 Edition", "Tourism Highlights, 2003 Edition".

Notes:

(1) *International Tourism Receipts*: This covers all tourism receipts made by visitors from abroad (inbound) on lodging, food and drinks, fuel, transportation in the country, entertainment, shopping, etc. This concept includes receipts generated by overnight as well as by same-day visitors. It excludes, however, the receipts related to international transport made by non-resident visitors (for instance ticket receipts from foreigners travelling with a national company), which are classified in a separate category called *International Fare Receipts*.

(2) *International Tourism Expenditure*: This covers expenditures of (outbound) visitors in other countries including their payments for lodging, food and drinks, fuel, transportation in the country, entertainment, shopping, etc. It includes expenditures made by overnight as well as by same-day visitors. It excludes, however, the expenditures related to international transport made by resident visitors (for instance ticket expenditures of residents travelling with an international company), which are classified in a separate category called *International Fare Expenditure*.

(-) Data are not available.

TABLE A.3: BALANCE OF INTERNATIONAL TOURISM (US\$ Million)

	1998	1999	2000	2001	2002
Albania	49	199	117	188	121
Algeria	-195	-170	-97	-128	-108
Azerbaijan	-45	-58	-69	-66	-55
Bahrain	224	306	349	380	363
Bangladesh	-147	-162	-251	-118	-145
Benin	44	68	65	63	53
Côte d'Ivoire	-115	-122	-140	-144	-
Egypt	1417	2825	3272	2668	2486
Gabon	-61	-76	-57	-100	-
Guinea	-26	-17	3	-1	12
Guyana	45	31	6	6	11
Indonesia	2229	2357	2552	1990	938
Iran	337	-228	-201	183	-1265
Jordan	420	440	335	280	370
Kazakhstan	-91	-31	-52	-78	-134
Kuwait	-2310	-2178	-2396	-2739	-2902
Kyrgyz Rep.	5	3	-1	12	10
Libya	-125	-122	-98	-203	-473
Malaysia	404	1567	2487	3760	4167
Maldives	261	280	298	286	272
Mali	37	33	30	-	-
Mauritania	-22	-27	-	-	-
Morocco	1288	1440	1614	2194	2202
Mozambique	-80	-187	-71	-149	-152
Niger	-7	9	12	15	12
Nigeria	-1425	-449	-530	-608	-687
Oman	-180	-222	-231	-163	-529
Pakistan	-254	-104	-168	-163	-74
Senegal	124	112	84	90	-
Sierra Leone	4	4	-	-	-
Sudan	-8	-13	-25	-18	-29
Suriname	-9	-4	-7	-9	7
Syria	437	401	442	730	603
Togo	10	6	3	6	5
Tunisia	1322	1264	1233	1341	1337
Turkey	6055	3732	5925	8329	10021
Uganda	49	7	-1	50	-
Yemen	-46	-75	6	-41	-40

Source: Calculated based on "Compendium of Tourism Statistics", 2004 Edition, World Tourism Organisation, Madrid 2004. (-) Data are not available.

TABLE A.4: BALANCE OF INTERNATIONAL TOURISM AS % OF GNP

	1998	1999	2000	2001	2002	Average 1998-2002
Albania	1.8	6.3	3.1	4.4	2.7	3.7
Algeria	-0.4	-0.4	-0.2	-0.3	-0.2	-0.3
Azerbaijan	-1.1	-1.3	-1.4	-1.2	-0.9	-1.2
Bahrain	3.6	4.9	5.0	5.2	4.6	4.7
Bangladesh	-0.3	-0.3	-0.5	-0.2	-0.3	-0.3
Benin	1.9	2.9	2.7	2.6	2.1	2.4
Côte d'Ivoire	-1.1	-1.2	-1.3	-1.3	-	-1.2
Egypt	1.8	3.3	3.4	2.7	2.5	2.7
Gabon	-1.3	-1.9	-1.5	-2.5	-	-1.8
Guinea	-0.7	-0.5	0.1	0.0	0.4	-0.1
Guyana	7.0	4.7	0.9	0.9	1.7	3.0
Indonesia	1.7	2.0	2.2	1.4	0.6	1.6
Iran	0.3	-0.2	-0.2	0.2	-1.1	-0.2
Jordan	5.8	5.7	4.0	3.2	4.1	4.5
Kazakhstan	-0.4	-0.2	-0.3	-0.4	-0.6	-0.4
Kuwait	-6.6	-6.8	-6.7	-7.3	-8.7	-7.2
Kyrgyz Rep.	0.3	0.2	-0.1	0.9	0.7	0.4
Libya	-0.4	-0.4	-0.3	-0.7	-2.4	-0.8
Malaysia	0.5	2.0	3.2	4.6	4.8	3.0
Maldives	54.5	51.0	50.9	48.1	45.5	50.0
Mali	1.5	1.2	1.1	-	-	1.3
Mauritania	-2.1	-2.6	-	-	-	-2.4
Morocco	3.7	4.2	4.8	6.3	6.2	5.0
Mozambique	-2.3	-4.9	-1.9	-4.0	-3.9	-3.4
Niger	-0.3	0.5	0.6	0.8	0.6	0.4
Nigeria	-4.5	-1.4	-1.5	-1.6	-1.8	-2.2
Oman	-1.2	-1.5	-1.4	-0.9	-2.6	-1.5
Pakistan	-0.4	-0.2	-0.3	-0.3	-0.1	-0.2
Senegal	2.7	2.4	1.8	1.9	-	2.2
Sierra Leone	0.6	0.6	-	-	-	0.6
Sudan	-0.1	-0.1	-0.3	-0.2	-0.3	-0.2
Suriname	-1.1	-0.5	-0.8	-1.2	0.8	-0.5
Syria	3.0	2.8	2.9	4.2	3.1	3.2
Togo	0.7	0.4	0.2	0.5	0.4	0.4
Tunisia	6.9	6.4	6.1	6.7	6.8	6.6
Turkey	3.0	2.0	2.9	5.0	5.8	3.8
Uganda	0.8	0.1	0.0	0.8	-	0.4
Yemen	-0.7	-1.1	0.1	-0.5	-0.4	-0.5

Source: Calculated based on "Compendium of Tourism Statistics", 2004 Edition, World Tourism Organisation, Madrid 2004. (-) Data are not available.

TABLE A.5: INTERNATIONAL TOURISM RECEIPTS AS % OF EXPORTS

	1998	1999	2000	2001	2002	Average 1998-2002
Albania	26.1	76.7	149.6	146.2	147.6	109.2
Algeria	0.7	0.6	0.5	0.5	0.7	0.6
Azerbaijan	20.6	8.7	3.6	1.9	3.1	7.6
Bahrain	5.7	7.9	7.5	7.7	8.8	7.5
Bangladesh	1.3	1.1	0.9	0.8	1.0	1.0
Benin	27.6	45.4	36.7	38.8	30.2	35.7
Burkina Faso	17.4	17.9	17.5	20.2	22.8	19.1
Chad	-	15.3	26.4	-	-	20.9
Comoros	400.0	158.3	93.8	24.3	39.3	143.1
Côte d'Ivoire	2.1	2.4	1.3	1.3	-	1.8
Egypt	80.3	110.4	69.0	91.8	54.0	81.1
Gabon	0.9	0.4	0.4	0.5	-	0.6
Guinea	0.2	1.4	1.9	2.6	4.9	2.2
Guyana	17.1	17.3	12.6	10.6	8.9	13.3
Indonesia	8.9	9.7	9.3	9.6	7.5	9.0
Iran	3.7	1.9	1.8	3.9	5.5	3.4
Jordan	62.6	64.3	56.2	30.5	29.4	48.6
Kazakhstan	7.4	6.5	3.6	4.4	6.4	5.7
Kuwait	2.0	0.7	0.5	0.6	0.8	0.9
Kyrgyz Rep.	1.6	3.1	3.0	5.0	7.4	4.0
Lebanon	170.5	99.4	103.9	85.4	98.5	111.5
Libya	0.3	0.4	0.8	0.8	0.8	0.6
Malaysia	3.0	3.8	4.6	7.2	7.3	5.2
Maldives	404.0	490.6	140.2	186.9	150.0	274.3
Mali	30.2	30.6	30.2	76.0	-	41.7
Mauritania	4.0	5.3	-	-	-	4.7
Morocco	36.9	23.0	25.1	36.3	32.0	30.7
Mozambique	59.6	57.6	51.1	19.0	21.1	41.7
Niger	8.7	14.5	14.3	19.8	17.9	15.1
Nigeria	1.3	1.3	0.9	1.2	1.6	1.2
Oman	2.1	1.5	1.3	2.2	2.8	2.0
Pakistan	1.2	0.9	0.9	1.0	1.1	1.0
Palestine	25.7	35.5	32.6	2.4	-	24.0
Saudi Arabia	-	5.0	4.5	5.0	5.1	4.9
Senegal	21.6	20.3	20.2	18.9	0.0	16.2
Sudan	3.9	3.1	1.8	3.0	3.3	3.0
Suriname	0.5	1.5	3.2	2.7	0.6	1.7
Syria	35.2	29.8	22.8	-	21.2	27.2
Tajikistan	-	0.1	0.2	0.1	0.3	0.2
Togo	5.1	3.8	3.7	5.0	3.0	4.1
Tunisia	27.1	20.7	24.8	24.4	23.5	24.1
Turkey	28.7	19.6	27.5	32.1	33.9	28.4
Uganda	35.0	26.5	36.2	52.8	57.1	41.5
U.A.E.	3.3	3.2	2.5	2.7	3.4	3.0
Uzbekistan	7.2	5.2	3.0	3.6	4.0	4.6
Yemen	5.6	2.5	1.1	1.1	1.2	2.3

Source: Calculated based on "Compendium of Tourism Statistics", 2004 Edition, World Tourism Organisation, Madrid 2004. (-) Data are not available.