

# INTERNATIONAL TOURISM IN THE OIC COUNTRIES: PROSPECTS AND CHALLENGES

# 2015

ORGANISATION OF ISLAMIC COOPERATION

STATISTICAL ECONOMIC AND SOCIAL RESEARCH  
AND TRAINING CENTRE FOR ISLAMIC COUNTRIES





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ORGANISATION OF ISLAMIC COOPERATION  
STATISTICAL ECONOMIC AND SOCIAL RESEARCH AND  
TRAINING CENTRE FOR ISLAMIC COUNTRIES (SESRIC)

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# Foreword

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Over the past few decades, international tourism activity has shown substantial and sustained growth in terms of both the number of tourists and tourism receipts. While the world tourist arrivals and tourism receipts have been growing substantially over the years, world tourism markets witnessed some important changes in the direction of tourism. This has been clear in the increase observed in the relative share of the developing countries, including the OIC member countries, in the world tourist arrivals and tourism receipts. As a substantial part of the developing countries, the OIC member countries also benefited from such a positive change. As a group, the OIC countries attracted 174.7 million tourists in 2013, compared with 156.4 million in 2009. International tourism receipts in the OIC countries also recorded a significant increase of about \$20 billion during the period 2009-2013 and reached \$144.1 billion as of 2013.

Similar trend has been also observed in intra-OIC tourism where intra-OIC tourist arrivals increased from 48.8 million in 2009 to 60.7 million in 2013, corresponding to 34.8 per cent of total OIC international tourist arrivals. One of the main driving factors behind this positive development in intra-OIC tourism is the emergence of the Islamic (Halal) tourism in which all tourism activities, services, facilities and products are in line with the principles of Islam.

The present version of the *International Tourism in the OIC Countries: Prospects and Challenges* report of SESRIC examines the performance and economic role of international tourism sector in the OIC countries in the latest five-year period for which the data are available. The report dedicates a special section to highlight the “Islamic Tourism”, as a new direction in the tourism sector in the OIC countries with a great potential for sustainable growth and significant contribution to the development of the overall tourism sector in these countries. The report also highlights the importance of the large-scale investments in the tourism sector in the OIC countries. To this end, a special section is devoted to highlight the Public-Private Partnerships (PPPs) as a successful model in the development of sustainable tourism sector and its possible implications in the OIC countries. The Report elaborates on the challenges ahead of the tourism industry in the OIC countries and proposes some recommendations to serve as broad policy guidelines to overcome these challenges.

Amb. Musa Kulaklıkaya

Director General

SESRIC



# 1 Introduction

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Defined by the United Nations World Tourism Organisation (UNWTO), international tourism comprises the activities of individuals travelling to and staying at places outside their usual permanent places of residence for a period not exceeding 12 months for leisure, business and other purposes. Based on this broad definition, the tourism industry includes all socio-economic activities that are directly and/or indirectly related to the provision of goods and services to tourists. In this regard, the UNWTO identifies 185 supply-side activities that have significant connections to the tourism sector.<sup>1</sup> These activities include the services of various sectors, such as transportation and communication, hotels and lodging, food and beverages, cultural and entertainment services, banking and finance, and promotion and publicity services. Defined by this impressive network of socio-economic activities and the infrastructure needed to support it, tourism is one of the largest sectors in the world as well as an important category of international trade.

Over the past few decades, international tourism activity has shown substantial and sustained growth in terms of both tourism revenues and number of tourists, and has left broad economic, social, cultural and environmental footprints reaching almost every part of the globe. International tourism activity generates significant economic benefits to tourists' host and home countries alike. According to the UNWTO, the number of international tourist arrivals increased from 880 million in 2009 to 1,133 million in 2014, corresponding to an average annual growth rate of 5.2 per cent. The revenues generated by those tourists, i.e. international tourism receipts, in terms of current US dollar prices, increased from \$852 billion to \$1,245 billion in the same period, corresponding to an average annual growth rate of 7.9 per cent; a rate which was significantly higher than that of the world economy during the same period. The world tourism revenues amounted to \$3.4 billion per day or \$1,099 per tourist arrival.

International tourism activity is also characterized by a continued increase in geographical spread and diversification of tourist destinations and products. Although the bulk of international tourism activity is still concentrated in the developed regions of Europe and the Americas, a substantial proliferation of new tourist-receiving markets is also observed in the developing regions. According to the UNWTO data, the two traditionally high tourist-receiving regions, Europe and the Americas attracted, together, 68.2 per cent of the world's total tourist arrivals in 2009. Yet, by 2014, this share declined to 67.4 per cent in favour of the developing regions of Asia & Pacific, the Middle East and Africa. Between 2009 and 2014, the recorded decrease in the share of Europe and Americas in the world tourism receipts was more substantial that went down from 67.8 per cent to 62.9 per cent in favour of the developing regions in the world. International tourism has turned into one of the main economic activities and an important source of foreign exchange earnings and employment in many developing countries. Therefore, in recent years, tourism development has

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<sup>1</sup> UNWTO, "Standard International Classification of Tourism Activities (SICTA)", [http://www.unwto.org/statistics/basic\\_references/index-en.htm](http://www.unwto.org/statistics/basic_references/index-en.htm)



been given much attention in the national development strategies of many developing countries and placed on the agenda of many recent international conferences on sustainable development.

With their rich and diverse set of natural, geographic, historical and cultural attractions, the OIC countries, as a group, possess a significant potential for the development of a sustainable international tourism sector. Yet, given the modest share of the OIC region in the world tourism market and the concentration of tourism activity in only a few OIC countries, apparently, a significant part of this potential remains unutilised. This state of affairs manifests itself in the relatively modest shares of the OIC countries, as a group, in the global international tourist arrivals and receipts, which were recorded at 16.1 per cent and 12 per cent in 2013, respectively. 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-related characteristics, level of development and national development priorities and policies.

All in all, tourism is a very important sector that could, if properly planned and managed, play a significant role in the socio-economic development of many OIC countries. This is true not only due to their existing and potential rich tourism resources, but also because their citizens travel in large numbers around the world for business, leisure and other purposes.

Another promising factor for the OIC countries in the domain of tourism is the emergence of Islamic (Halal) tourism. An increasing number of people living in the OIC countries prefer to use tourism facilities and services designed in line with the Islamic principles. According to the latest estimates, the demand for Islamic (Halal) tourism will continue to grow and is expected to reach \$200 billion by 2020. The positive trend seen in Islamic tourism not only boosts the overall tourism sector in the OIC countries but also helps to increase intra-OIC tourism activities since the majority of the Islamic tourism facilities and services are being provided in the OIC countries. However, Islamic tourism market is highly concentrated in the Middle East and North Africa (MENA) region which accounts for half of the total out bound tourism expenditures made by the Muslim tourists. The 57 Members of the OIC are the major source market for the global Islamic tourism industry. With estimated tourism expenditures of over \$100 billion, these countries account for around 82 per cent of the total tourism expenditures made by the Muslim tourists in 2013-2014. Currently, 14 out of the 20 top Islamic tourism markets are OIC countries, whereas the remaining six are Muslim minority countries in the Europe and America. Malaysia, Turkey, United Arab Emirates, Saudi Arabia and Qatar are the top Islamic tourist destinations.

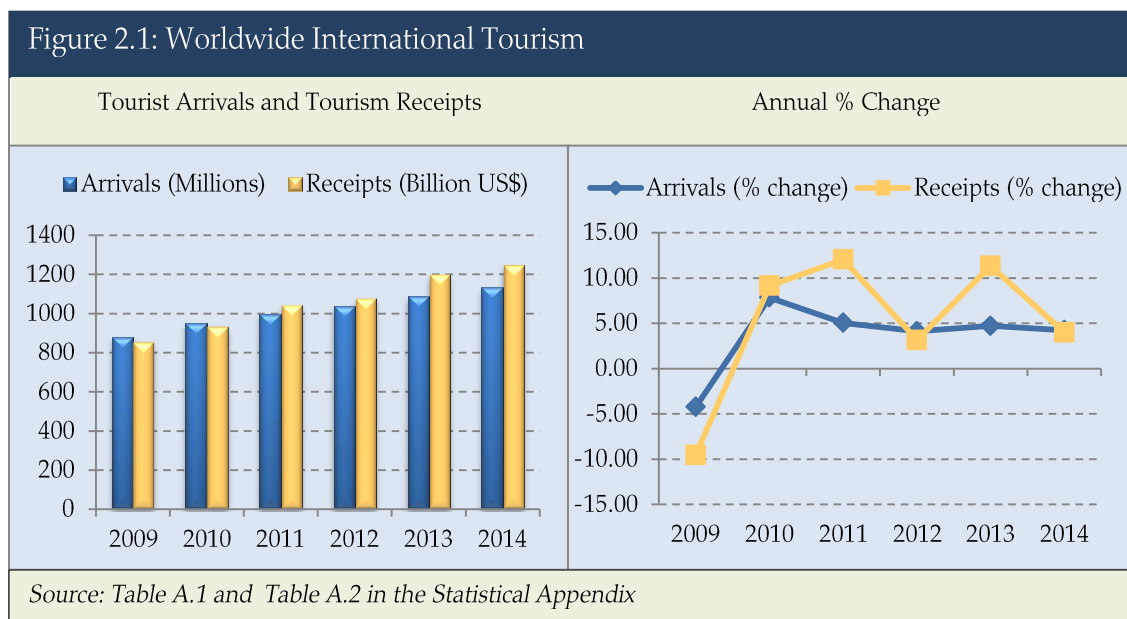
Tourism has been defined as one of the ten priority areas of cooperation in the OIC Plan of Action to Strengthen Economic and Commercial Cooperation among the Member Countries which was adopted in 1994. Tourism has also been identified as one of the six priority areas for cooperation in the recently adopted COMCEC Strategy with the strategic objective of developing a sustainable and competitive tourism sector in the OIC region. In this context, it is also worth noting that tourism cooperation activities have over the last decade assumed greater importance on the agenda of the OIC where eight Islamic conferences of tourism ministers and a number of expert group meetings and seminars on tourism development were held during the period that elapsed since the First Islamic Conference of Tourism Ministers, which was held in Isfahan, Islamic Republic of Iran,

in October 2000. A wide range of actions has been adopted in these conferences and meetings aiming at developing the tourism sector in the OIC countries and enhancing their cooperation in this vital and multidimensional field of economic, social and cultural activity. Yet, the desirable levels of tourism development in many OIC countries, and in the OIC region as a whole, have not yet been achieved.

Given this state of affairs, this report attempts to assess the performance and economic role of the international tourism sector in the OIC countries in the latest five-year period for which the data are available. It analyses the two traditionally used indicators in measuring international tourism, i.e. international tourist arrivals and international tourism receipts. The analysis is made at both the individual country and the OIC regional levels. The Report dedicates a section to the Islamic tourism topic, which constitutes a great potential for the development of the tourism sector in OIC countries. The Report also highlights the potential role of the Public-Private Partnerships (PPPs) model to realize large-scale investments in the tourism sector and its implications for the development of the tourism sector in the OIC countries. In the conclusion, the Report sheds light on the challenges of tourism development in the OIC countries and the issue of tourism cooperation among them and proposes some recommendations to serve as broad policy guidelines to which the attention of these countries needs to be drawn.

## 2 International Tourism Worldwide: Overview

The number of international tourist arrivals worldwide increased from 880 million in 2009 to 1,133 million in 2014, corresponding to an average annual growth rate of 5.2 per cent. In the same period, international tourism receipts, in current US dollar prices, increased from \$852 billion to \$1,245 billion, corresponding to an average annual growth rate of 7.9 per cent (Table A.1. and Table A.2 in the Statistical Appendix). In terms of worldwide regional distribution, Europe, the Asia & Pacific and the Americas were the top three main tourist-receiving regions in 2009. They attracted, respectively, 460, 180.9 and 140 million tourists, corresponding to 52.3, 20.6 and 15.9 per cent of the world tourism market in 2009 (Figure 2.2). A detailed look at the annual changes in the world international tourist arrivals and tourism receipts indicates that tourism sector worldwide experienced significant growth rates both in terms of tourist arrivals and tourism receipts between 2009 and 2010, which was mainly due to the recovery after the global financial crisis .



Since international tourism is characterised by a growing tendency for tourists to visit new destinations, coupled with the diversification of tourism products as well as increasing competition in international tourism markets, new destinations are steadily growing at a faster pace in many developing countries, particularly located in the Asia & Pacific region. Therefore, these regions experience a remarkable increase in their share in the world tourism market. For example, the Asia & Pacific region, mostly consisting of developing countries, experienced the highest annual growth rate of tourist arrivals measured at 7.8 per cent between 2009 and 2014. It was followed by Americas with an annual average growth rate of 5.3 per cent. Africa, as a developing region, achieved a remarkable increase in international tourist arrivals with an average annual growth rate of 4 per cent during the period under consideration. In contrast, Middle East could not improve its overall performance due to the on-going conflicts and political instability in the region. The number of international tourist arrivals in the Middle East region was 52.9 million in 2009 and

decreased to 51.1 million in 2014, corresponding to a 0.7 per cent average annual contraction rate. As a traditionally high tourist-receiving region, Europe recorded a 4.8 per cent annual growth rate between 2009 and 2014 that stayed below the world average of 5.2 per cent (Table A.1. and Table A.2 in the Statistical Appendix).

During 2009-2014, the Asia & Pacific and the Americas were the only two regions that achieved to increase their share in the world tourism market in terms of the number of tourist arrivals. The share of the Asia & Pacific region went up from 20.6 per cent in 2009 to 23.4 per cent in 2014 (see Figure 2.2). The share of the Asia & Pacific region in world tourism receipts also jumped from 23.8 per cent in 2009 to 30.3 per cent in 2014. Despite seeing positive growth in terms of world tourist arrivals, a substantial decrease was observed in the share of Europe in world tourism receipts that went down from 48.4 per cent to 40.9 during 2009-2014. A major reason behind this picture is the on-going economic uncertainty in several European countries that affected expenditures of European tourists negatively. Africa region received a smaller share in world tourism receipts in 2014 when compared to 2009 where its share decreased from 3.3 per cent to 2.9 per cent (see Table A.1 in the Statistical Appendix, Figure 2.3 and 2.4). Therefore, African countries not only need to focus on increasing international tourist arrivals but also try to find ways to boost receipts from tourism through diversifying tourism activities (e.g. beach vs. mountain) and developing alternative tourism types (e.g. balloon safari tours) as well as implementing market-targeting strategies (trying to attract more tourists from countries with a higher consumption tendency).

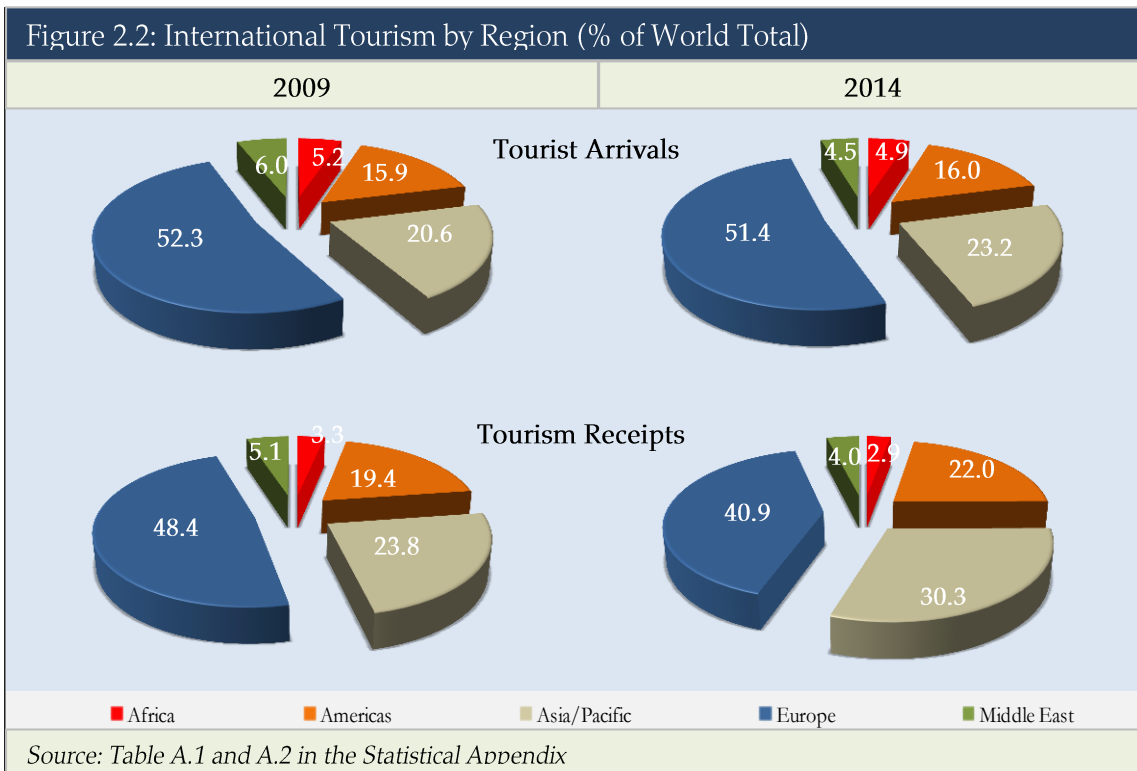
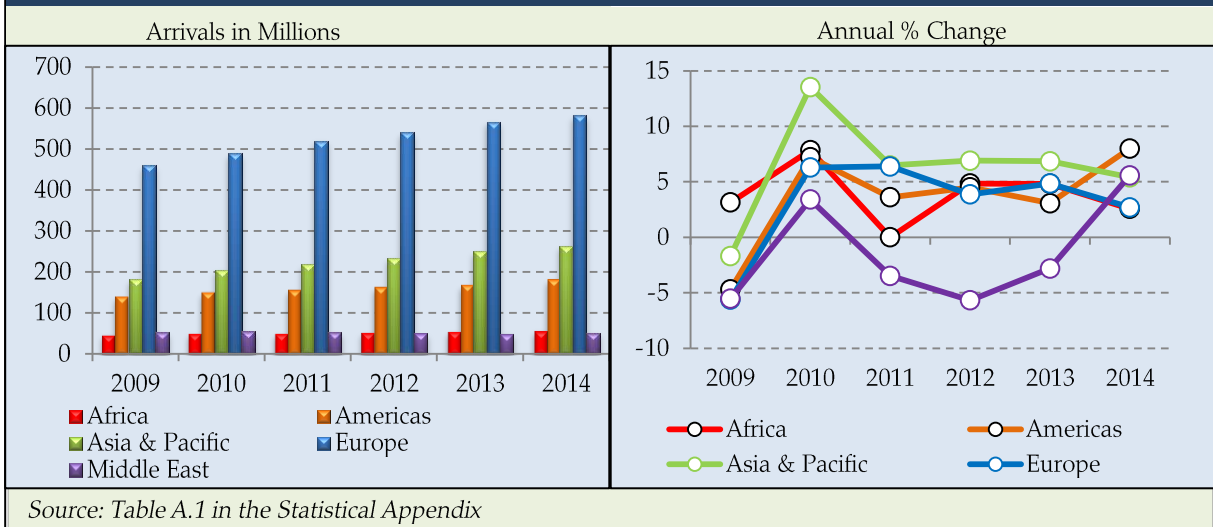


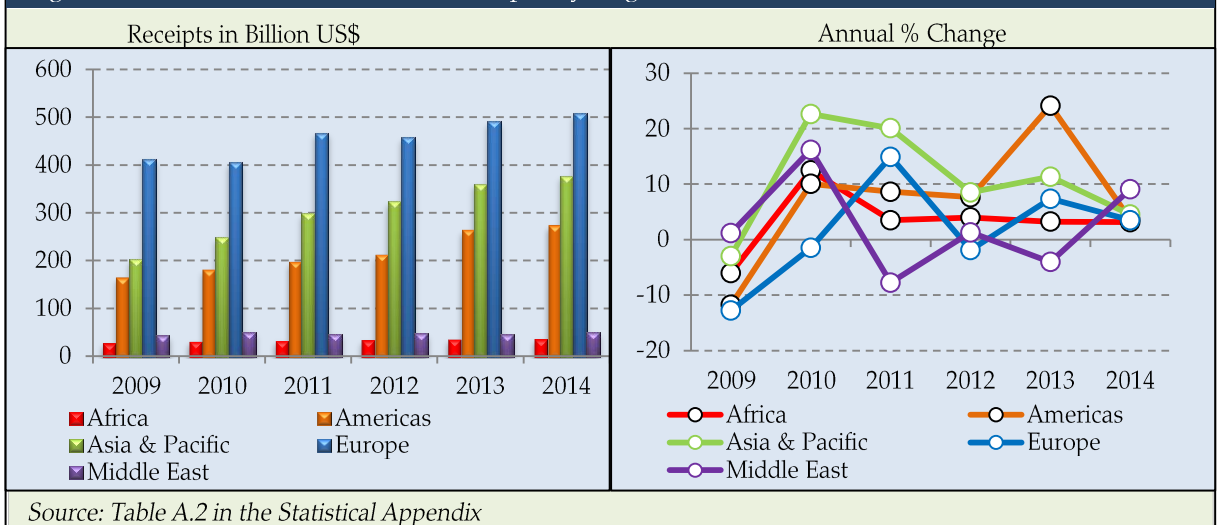
Figure 2.2 also shows that Europe and Americas were continuing as strong performer regions in the world tourism market both in 2009 and 2014. In 2014, these two regions accounted for 62.9 per cent of all international tourism receipts and 67.4 per cent of all international tourist arrivals.

Figure 2.3: International Tourist Arrivals by Region



It should be noted that the global financial crisis, which started in July 2007 in the United States, deepened during 2008-2009 with a global reach and affected a wide range of financial and economic activities and institutions in many developed and developing countries around the world. As a result, like many other economic activities, in 2009, international tourism activity witnessed one of the worst downturns in the last five decades. In fact, until the first half of 2008, international tourism was performing well. Yet, in the second half of 2008 and the whole year of 2009, tourism sector was hit very hard due to the impact of the global financial crisis and the sharp rise in world oil prices together with the outbreak of swine flu. In this context, it is worth mentioning that developed economies of the Americas and Europe, which are the origin of the global financial crisis, have also played an important role in further intensifying its negative impacts on tourism industry as these countries are the major tourist-generating regions in the world.

Figure 2.4: International Tourism Receipts by Region



As countries tend to reach their normal economic growth rates after the global economic recovery, the number of tourist arrivals started to follow a more stable trend rather than a positive trend between 2010 and 2014. As a natural result, the worldwide tourism receipts showed some booms and boosts between 2010 and 2014, and could not keep its steep positive growth pace unlike during the 2009-2010 period (Figure 2.1, right). This bears an important uncertainty item for many developing countries that are relatively more dependent on tourism activities, which are generating substantial amount of foreign currency income and fuelling economic growth.

In 2010, international tourism activity rebounded significantly throughout the world recording 949 million international tourist arrivals and \$930 billion international tourism receipts. It is observed that as a reflection of the economic conditions, recovery was particularly strong in emerging economies. Between 2009 and 2010, the Asia & Pacific region enjoyed the highest annual change both in terms of international tourist arrivals (13.5 per cent) and tourism receipts (22.6 per cent). The Middle East region recovered its tourism figures very quickly in the same period in which tourism receipts went up by 16.2 per cent while the arrivals increased by 3.4 per cent. The existing differences seen between the change in the international tourist arrivals and the change in the international tourism receipts can be attributed to the exchange rate differences and tourism strategies implemented (e.g. higher value added generating tourism). It is also evident that in economic hard times, international tourists typically do not react so much by refraining from travel, but by trading down; i.e. choosing, for instance, shorter stays in less expensive destinations closer to home, with travel and accommodation in lower categories. As economic recovery takes place they tend to spend more during their holidays and stay longer at their destinations. In this context, tourism receipts may grow more or less than the number of tourist arrivals depending on the above-mentioned factors.

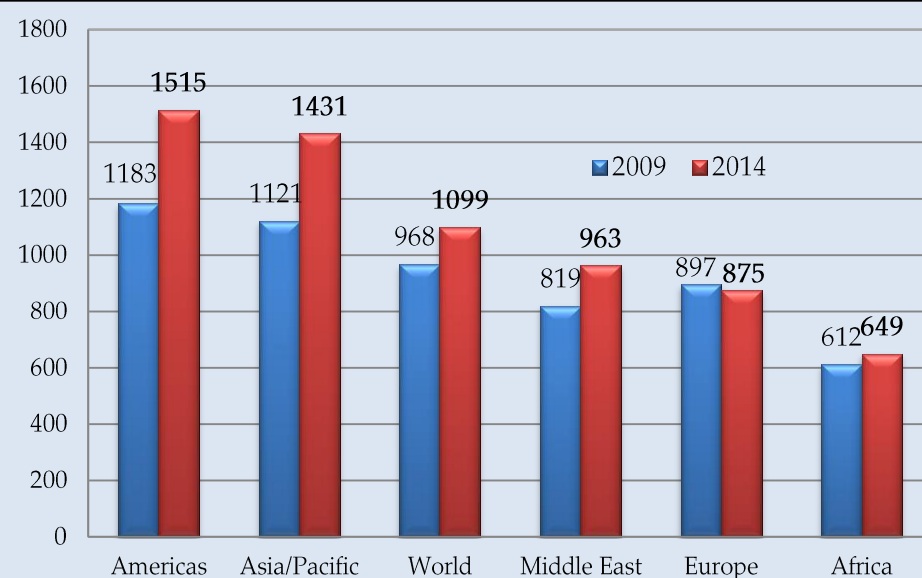
In 2011, worldwide tourist arrivals reached 997 million and tourism receipts went up to US\$1,042 billion. Asia & Pacific and Europe recorded the highest growth rates in terms of international tourist arrivals, 6.5 per cent and 6.4 per cent, respectively. In the same year, Americas recorded a positive growth rate in international tourist arrivals (3.6 per cent). The Middle East and Africa experienced difficult times due to social movements and lack of security which resulted in the diversion of travelling demand away from the Middle East and Africa, explaining why a significant portion of the international tourism activity was concentrated within the European region. In 2012, both international tourist arrivals and tourism receipts continued to recover from the low figures recorded in 2009 where international tourist arrivals reached to 1,038 million and tourism receipts hit \$1,075 billion, growing by 4.1 per cent and 3.2 per cent, respectively. However, it is also observed that the repercussions of social movements across Arab region were present and the Middle East remained to be the only region around the world where international tourism arrivals continues to display a negative trend. In 2012, unlike its weak performance in 2011, Africa region enjoyed a 4.8 per cent growth in tourist arrivals and 4 per cent in tourism receipts.

In 2013, international tourist arrivals increased by 4.7 per cent to reach 1,087 million and international tourism receipts reached US\$1,197 billion, corresponding to 11.3 per cent increase compared to the previous year. Asia & Pacific was the best performer region both in terms of

growth recorded in arrivals (6.8 per cent) and receipts (11.3 per cent). In terms of annual change recorded in tourist arrivals in the same year, Asia & Pacific was followed by Europe (4.85 per cent) and Africa (4.82 per cent). The Middle East region was the only region that experienced a negative growth rate both in arrivals (-2.8 per cent) and receipts (-4 per cent) in 2013.

As of 2014, international tourist arrivals hit 1,133 million and tourism receipts reached \$1,245 billion, corresponding to 4.2 and 4 per cent increase over the previous year, respectively. In particular, a strong growth was recorded in Americas and the Middle East regions in terms of international tourist arrivals, that increased by 8 per cent and 5.6 per cent, respectively. After four years of negative growth trend in arrivals, 2014 was the year in which the Middle East region recorded a positive growth rate in terms of tourist arrivals. As a reflection of the positive performance seen in tourist arrivals, tourism receipts also increased by 3.6 per cent in Americas and 9.1 per cent in the Middle East region (Figure 2.3 and Figure 2.4). In terms of international tourist arrivals, Africa and Europe recorded the lowest growth rate figures that stayed around 2.6 per cent. In terms of international tourism receipts, Africa region had the lowest growth rate (3.1 per cent) while the highest growth was observed in the Middle East region (9.1 per cent) followed by Asia & Pacific (4.5 per cent) and Americas (3.6 per cent) (Figure 2.4).

Figure 2.5: International Tourism Receipts per Arrival 2009 vs. 2014 (US\$)



Source: Table A.1 and Table A.2 in the Statistical Appendix

Overall, while the trends in tourism receipts followed, in general, similar patterns to those in tourist arrivals, the average growth rates of tourism receipts and the regional shares in world total were somewhat different. For example, Americas recorded an annual average growth rate of 5.3 per cent between 2009 and 2014 in tourist arrivals. In the same period, tourism receipts in Americas grew, on average, annually by 10.6 per cent, a rate which was two times higher than the growth rate observed in tourist arrivals. On the other hand, over the period 2009-2014 in Europe the

average annual growth rate calculated for tourist arrivals and tourism receipts were equal to 4.8 per cent and 4.3 per cent, respectively. The existence of these differences in growth of tourist arrivals and receipts is mainly due to the fact that the international tourism receipts per arrival vary as each region has its own touristic 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 2014 amounted to \$1,099. The highest average tourism receipts per arrival was recorded in Americas (\$1,515), followed by the Asia & Pacific (\$1,431). In 2014 international tourism receipts per arrival in the other regions remained below the world average ranging from \$963 in the Middle East and \$875 in Europe to \$649 in Africa (see Figure 2.5). Compared with 2009, the Americas increased the international tourism receipts per arrival the most in nominal terms by \$332 followed by the Asia & Pacific. The figures on Americas indicate that countries in Americas, on average, were not only successful in improving the number of tourist arrivals but also achieved to benefit to a higher extent from tourism activities by earning more income from international tourists. During the 2009-2014 period, the world average climbed from \$968 to \$1,099 that corresponds to a nominal increase of \$131. Africa stayed the below of the world average of \$131 and could only see an increase about \$37. In the same period, the only region that saw a substantial decrease in international tourism receipts per arrival was the Europe where its average went down from \$897 to \$875. It was mainly stemming from the effect of on-going economic crisis that hit several European economies severely.



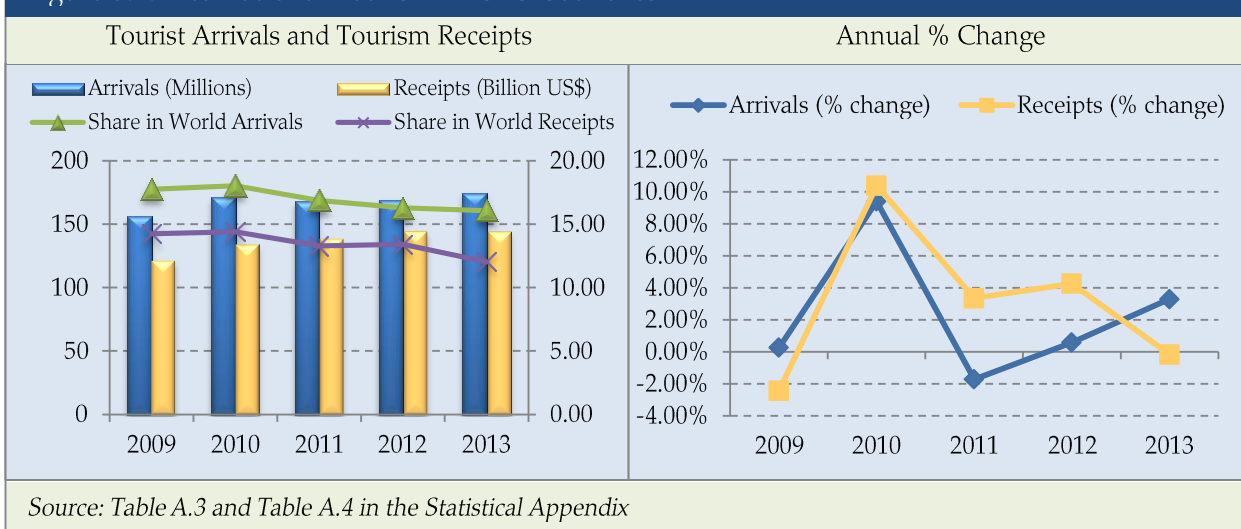
### 3 International Tourism in the OIC Countries

This section attempts to assess the performance and economic role of the international tourism sector in the OIC countries. The first sub-section examines the trends in the two traditionally used indicators in measuring international tourism, i.e. international tourist arrivals and international tourism receipts. The analysis is conducted at both the individual country and the OIC regional levels. The second sub-section assesses the economic role of the international tourism sector in the OIC countries. The third sub-section attempts, as much as the available relevant data allows, to shed light on the state of intra-OIC tourism. Finally, sub-section four provides some concluding remarks and policy recommendations.

#### 3.1 Tourist Arrivals and Tourism Receipts

As shown in Figure 3.1, the number of international tourist arrivals in the OIC countries, for which the data are available, reached 156.3 million in 2009, corresponding to a 17.8 per cent share in the total international tourist arrivals worldwide. These tourists generated \$121.3 billion as international tourism receipts in the OIC countries, corresponding to a 14.2 per cent share in the world's total tourism receipts. When compared to 2008, international tourism receipts declined by 2.4 per cent in the OIC countries in 2009 due to the impact of the global financial crisis. International tourist arrivals in the OIC region reached 171 million in 2010, corresponding to an increase by 9.4 per cent over the year 2009. The share of the OIC group in the world tourist arrivals also increased in 2010 by 0.2 per cent and recorded at 18 per cent. International tourism receipts amounted to \$133.9 billion in the same year, corresponding to an increase by 10.4 per cent when compared to 2009. With this, the OIC group got a 14.4 per cent share in the world's total tourism receipts in 2010. These figures clearly indicate that tourism sector in the OIC countries was also affected from the financial crisis as heavily as the rest of the world.

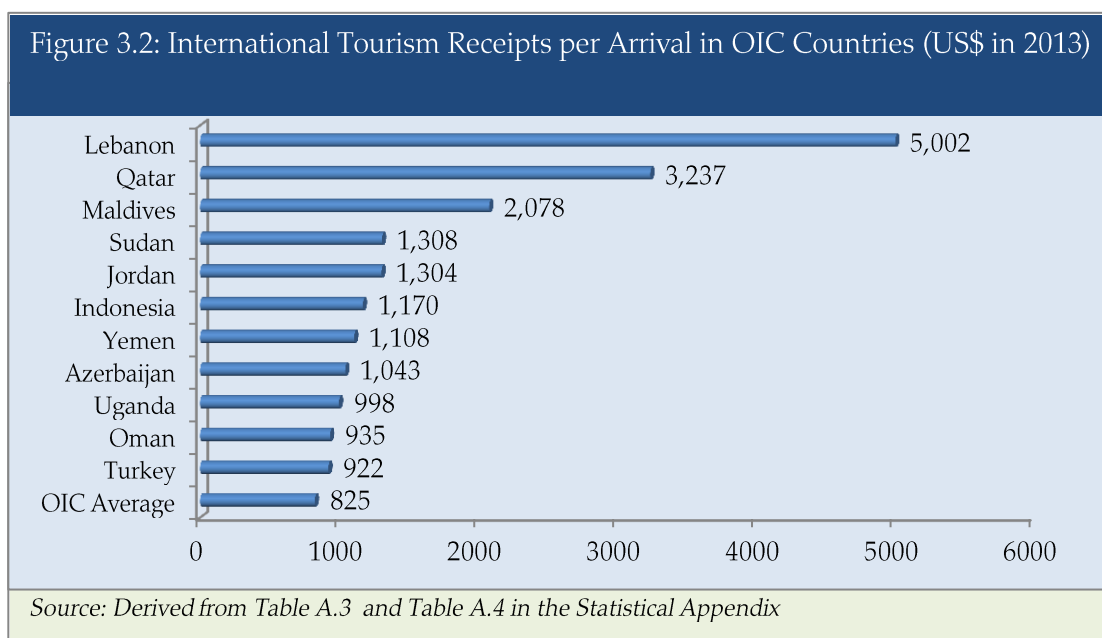
Figure 3.1: International Tourism in OIC Countries



In 2011, although the number of international tourist arrivals in the OIC region witnessed a slight decrease (1.7 per cent), international tourism receipts increased by 3.3 per cent. However, it should be noted that the share of the OIC countries in the total international tourist arrivals decreased from 18.0 per cent in 2010 to 16.9 per cent in 2011. Similarly, the share of the OIC countries in world's total tourism receipts decreased from 14.4 per cent in 2010 to 13.3 per cent in 2011.

In 2011, social movements harmed the tourism industry not only in the countries that went through regime change and major protests, but also in the region as a whole. The number of tourist arrivals, tourism receipts as well as the share of the OIC countries in both worldwide total international tourist arrivals declined in 2011. Different countries were affected in different patterns and intensities. Some were hit by sudden and dramatic falls like the Tunisian case, and others like Yemen were marked by modest yet continuous trends.

The recovery of the world economy, in particular the economies of the major tourist-generating regions of the Americas and Europe, contributed to the better results of tourism in the OIC region in 2012. Growth was common in almost all the countries in the region, but was particularly strong in countries such as Turkey, Indonesia and Malaysia. International tourist arrivals in the OIC region increased to 169 million, corresponding to an increase by 0.6 per cent in 2012 when compared to 2011. With this figure, the OIC countries represented 16.3 per cent share in the total international tourist arrivals worldwide in 2012. Similarly, international tourism receipts grew by 4.2 per cent in 2012 and amounted to \$144.3 billion that represented a share of 13.4 per cent in the world's tourism receipts in 2012.



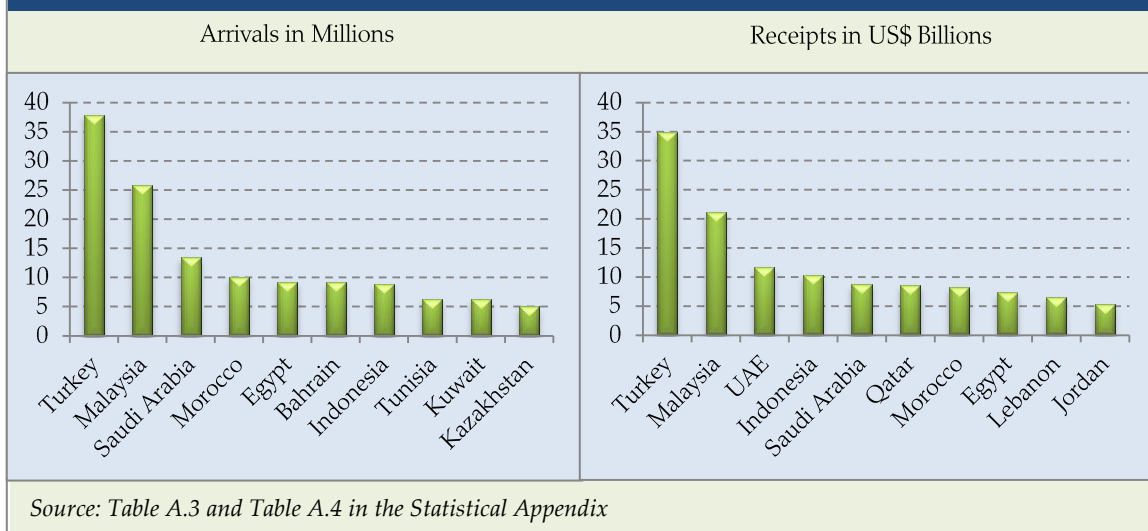
The number of international tourist arrivals in the OIC countries, for which the data are available, grew by 3.3 per cent and increased to 174.7 million in 2013, corresponding to a 16.1 per cent share in the total international tourist arrivals worldwide. However, international tourism receipts in the

OIC region contracted by 0.2 per cent in the same year and amounted to \$144 billion, corresponding to a 12.0 per cent share in world's total tourism receipts.

While, in absolute terms, the trends in international tourism receipts were generally similar to those in international tourist arrivals, the shares of the individual countries in the total OIC international tourism receipts as well as the average growth rates of those receipts were somewhat different. This is due to the fact that receipts per arrival vary as each country has its own tourism characteristics in terms of length of stay of tourists, purpose of their visit, geographical distance, types of shopping, etc. For example, as shown in Figure 3.2, the OIC average tourism receipts per arrival in 2013 amounted to \$825. In the same year, the highest receipts per tourist arrival were recorded in Lebanon (\$5,002) followed by Qatar (\$3,237), Maldives (\$2,078), Sudan (\$1,308), Jordan (\$1,304), Indonesia (\$1,170), Yemen (\$1,108), Azerbaijan (\$1,043), Uganda (\$998), Oman (\$935), and Turkey (\$922).

At the individual country level, it is observed that international tourism activity, in terms of both tourist arrivals and tourism receipts, is still concentrated in a few countries. For example, in 2013, only 10 OIC countries, namely Turkey, Malaysia, Saudi Arabia, Morocco, Egypt, Bahrain, Indonesia, Tunisia, Kuwait and Kazakhstan were the top 10 international tourist destinations among the OIC countries (Figure 3.3). These 10 countries together hosted 131.5 million international tourist arrivals, corresponding to a share of 75.2 per cent of the total OIC tourism market in 2013 (calculated based on the data in Table A.3 in the Appendix).

Figure 3.3: Top 10 Tourist Destinations and Tourism Earners in 2013



Similarly, international tourism receipts in the OIC countries are also concentrated in a few countries, the majority of them being the main OIC tourist destinations shown in Figure 3.3. In descending order, Turkey, Malaysia, United Arab Emirates, Indonesia, Saudi Arabia, Qatar, Morocco, Egypt, Lebanon and Jordan were the top 10 OIC countries in terms of tourism receipts in 2013. This group of OIC countries earned \$121.8 billion as international tourism receipts in 2013, corresponding to a share of 84.5 per cent of the total OIC tourism receipts in that year.

In this context, it is worth mentioning that, in 2011, two OIC tourist destinations, namely Turkey and Malaysia, were also ranked 6th and 10th, respectively among the top 10 world tourist destinations. The latest estimations conducted by the UNWTO indicate that the ranking for Turkey was sustained in 2014 (see UNWTO).<sup>2</sup>

### 3.2 Balance of International Tourism: The Economic Role of International Tourism

In this sub-section, an attempt is made to assess the economic role of the international tourism sector in the economies of the OIC countries. This is made by calculating the balance of international tourism, i.e., by deducting the international tourism expenditure from the international tourism receipts, for each individual country for which the relevant data are available in the five-year period of 2009-2013. The net contribution of the international tourism sector to the economies of OIC countries is then examined by relating the balance of international tourism as a percentage of the GDP of each country. The sector is also evaluated as a source of foreign exchange earnings by relating the international tourism receipts in each country, as a percentage, to its total merchandise exports in the same period.

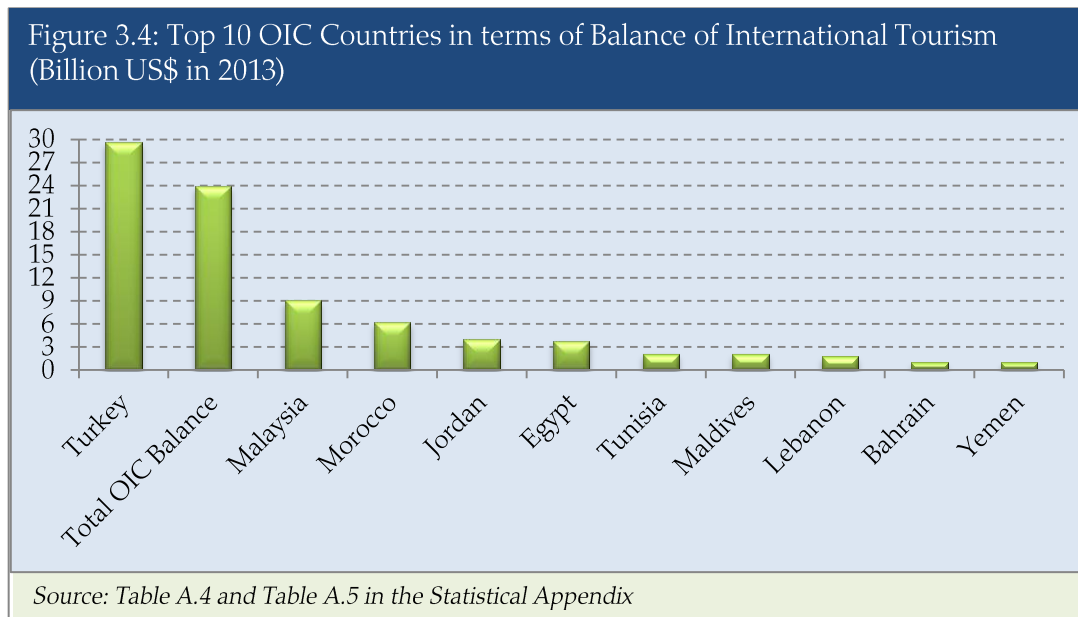


Figure 3.4 displays the top 10 OIC countries in terms of their balance of international tourism in billions of US dollars in 2013. It is obvious that the majority of these countries are the main OIC international tourism destinations and earners. It is also observed that the balance of international tourism of some OIC countries accounts for a high percentage of their international tourism receipts. This is true for some countries like Maldives (89.4 per cent), Yemen (85.3 per cent), Turkey (84.8 per cent), Morocco (75.6 per cent), Tajikistan (75.5 per cent), Tunisia (73.1 per cent) and Sierra Leone (69.6 per cent). The total OIC international tourism balance amounted to \$23.8 billion in

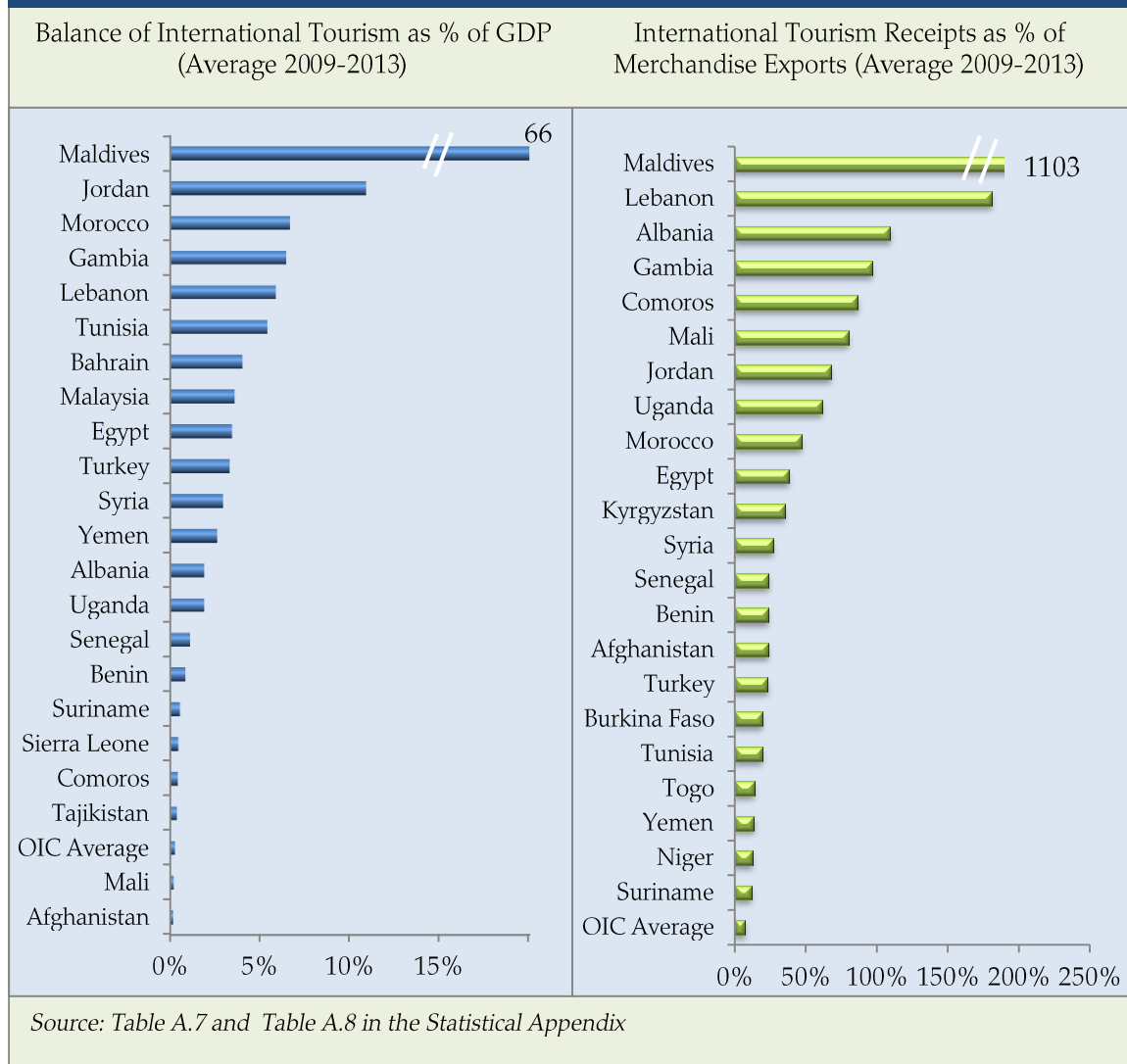
<sup>2</sup> UNWTO, "World Tourism Highlights", 2015.

2013, corresponding to almost 16.5 per cent of total OIC international tourism receipts (calculated based on the data in Table A.4 and Table A.6 in the Statistical).

When the economic role of the international tourism sector in the economies of the OIC countries is examined in terms of its net contribution to the GDP of each country, the picture, as shown in Figure 3.5 (left), reflects a widely different situation. The economic role of the international tourism sector in the economies of the OIC countries is neither a function of the size nor the level of affluence of the economy. With an average of 66.7 per cent of GDP during 2009 through 2013, international tourism is the major economic activity in the Maldives. International tourism reached 10.9 per cent of GDP in Jordan. Figure 3.5 also shows that the international tourism activity plays a relatively important role compared to the size of the economy in 9 OIC countries for which the balance of international tourism accounts, on average, for 3 to almost 8 per cent of their GDP. This group includes some of the OIC's main tourism destination and earner countries (e.g., Lebanon, Morocco, Tunisia, Egypt, Malaysia and Bahrain). 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, where 27 countries recorded, on average, a deficit in their balance of international tourism during 2009 through 2013 (Table A.7 in the Appendix). During the 2009-2013 period, the net contribution of international tourism activity was accounted, on average, for 0.26 per cent of the total GDP in the OIC countries.

However, when the international tourism sector is evaluated as a source of foreign exchange earnings by relating the international tourism receipts in each country, as a percentage, to its total merchandise exports, Figure 3.5 (right) indicates that international tourism activity plays a more significant role in the economies of the OIC countries as a source of foreign exchange earnings. During the period 2009-2013, international tourism generated foreign exchange earnings almost 11 times, on average, more than those generated by merchandise exports in the Maldives. In the same period, international tourism receipts accounted, on average, for more than 180 per cent of the total merchandise exports of Lebanon, more than 109 per cent in Albania, more than 96 per cent in Gambia, more than 86 per cent in Comoros, more than 80 per cent in Mali, more than 60 per cent in Jordan and Uganda, and more than 25 per cent in Morocco, Egypt, Kyrgyzstan and Syria. Moreover, international tourism receipts accounted for 13 to 23 per cent of the value of the merchandise exports in Senegal, Benin, Afghanistan, Turkey, Burkina Faso, Tunisia, Togo and Yemen (Figure 3.5). Yet, in 35 OIC countries, international tourism receipts were still accounted for less than the average of the OIC of 7.3 per cent of their total merchandise exports (Table A.8 in the Appendix).

Figure 3.5: Role of International Tourism in the Economy



### 3.3 Intra-OIC Tourism

As in other dimensions of the economic integration (e.g. trade and investment), intra-OIC tourism trends can be a good indicator to assess the level of economic integration among the OIC countries. Higher levels of intra-OIC tourism in terms of both intra-OIC tourist arrivals and intra-OIC tourism receipts indicate an improvement in intra-OIC economic cooperation.

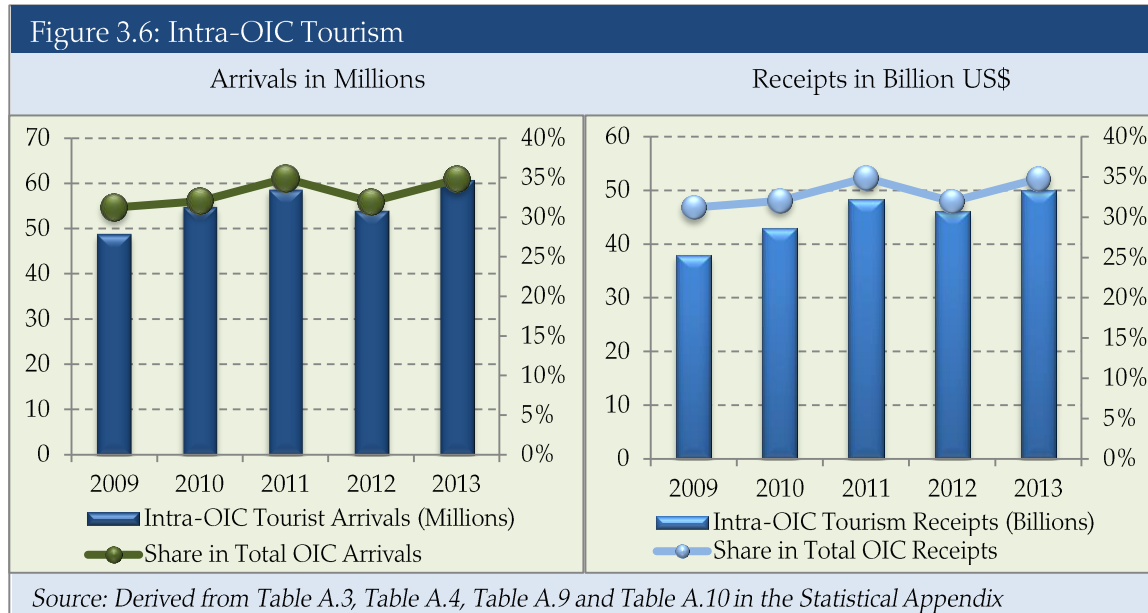
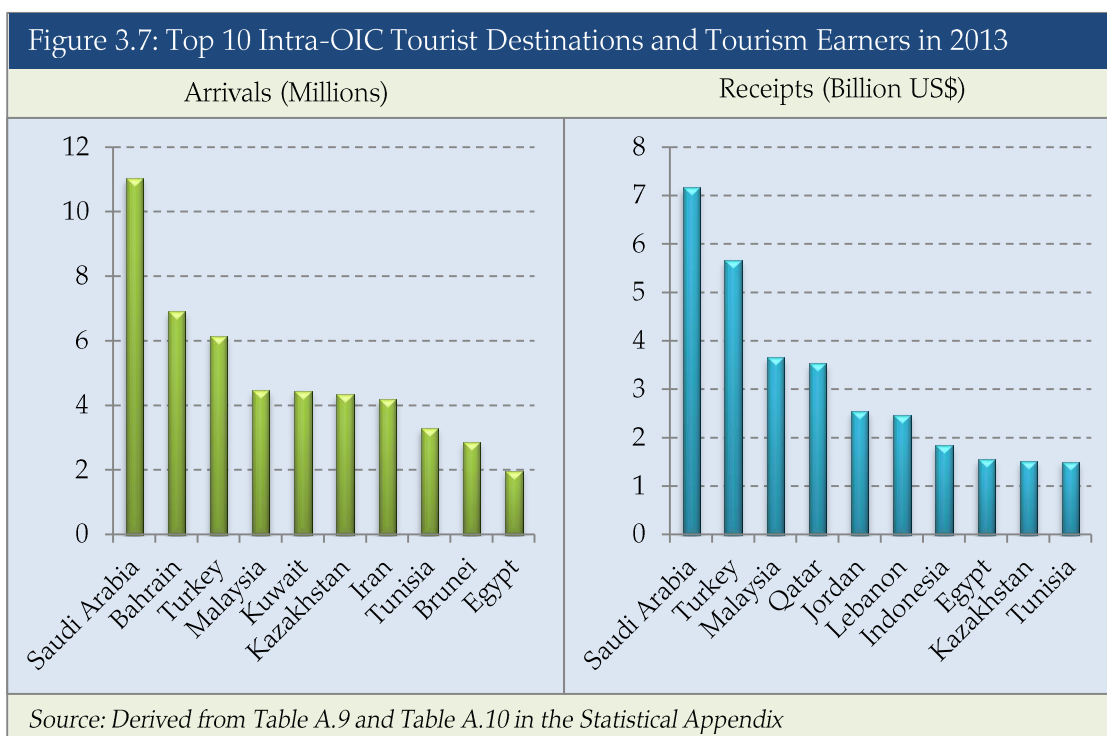


Figure 3.6 presents the trends on the intra-OIC tourist arrivals and tourism receipts between 2009 and 2013. According to Figure 3.6, in 2009 intra-OIC tourism, in terms of the number of tourist arrivals, measured as 48.8 million arrivals, corresponding to 31.2 per cent of the total international tourist arrivals in the OIC countries for which the relevant data are available. In 2010, with the modest recovery in the global markets after the crisis, intra-OIC tourist arrivals increased to 54.8 million arrivals, corresponding to an increase by 12.8 per cent over the previous year, the share of intra-OIC tourist arrivals in total OIC international tourist arrivals reached 32 per cent. In 2011, intra-OIC tourist arrivals continued to go up and hit 58.7 million arrivals, corresponding to a 34.9 per cent share in total OIC international tourist arrivals. In 2012, due to conflicts in some OIC countries, especially located in the Middle East region, intra-OIC arrivals saw a decline and measured as 54 million arrivals that represented a 31.9 per cent share in total OIC international tourist arrivals. Finally, in 2013 intra-OIC tourist arrivals bounced back and climbed to 60.7 million arrivals that was the highest figure measured during the 2009-2013 period. In 2013, intra-OIC tourist arrivals represented a share of 34.8 per cent in total OIC international tourist arrivals.

A similar trend was also observed in the case of the intra-OIC tourism receipts as a share of total OIC international tourism receipts during the period under consideration (Figure 3.6). A strong growth took place between 2009 and 2011 in intra-OIC tourism receipts that climbed from \$37.9 billion in 2009 to \$48.3 billion in 2011. In the same period, the share of intra-OIC tourism receipts in total OIC receipts also recorded a meaningful increase that went up from 31.2 per cent to 34.9 per cent. As seen in intra-OIC tourist arrivals, 2012 was a year in which the intra-OIC tourism receipts decreased to \$46.1 from \$48.3 in 2011. A recovery took place in intra-OIC tourism receipts in 2013 and reached \$50.1 billion, corresponding to a 34.8 per cent share in total OIC international tourism receipts.

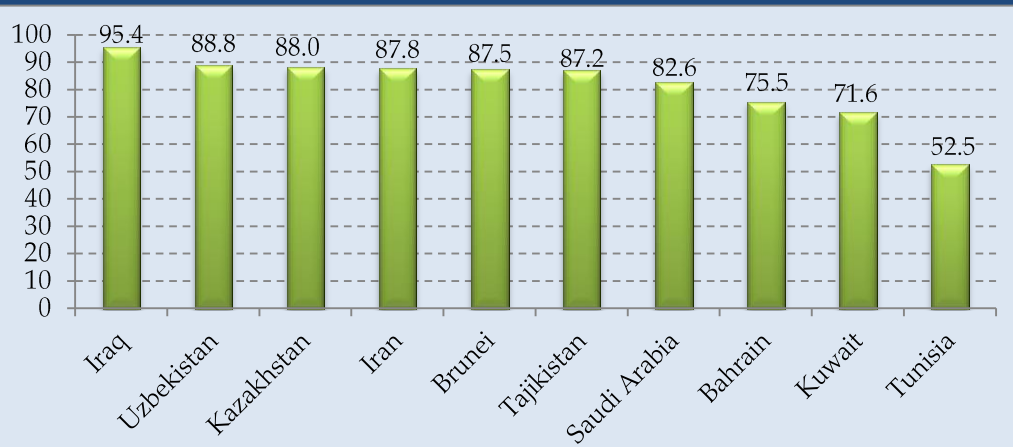


At the individual country level, it is observed that the intra-OIC tourist arrivals are concentrated in a few countries. Figure 3.7 presents top-ten performer OIC countries in terms of intra-OIC tourist arrivals and tourism receipts in 2013. In descending order, Saudi Arabia, Bahrain, Turkey, Malaysia, Kuwait, Kazakhstan, Iran, Tunisia, Brunei and Egypt were the top 10 intra-OIC tourism destinations in 2013 (Figure 3.7). Together, they hosted 49.7 million tourists from the OIC countries, corresponding to 81.8 per cent of the total intra-OIC tourist arrivals in that year. In descending order, Saudi Arabia, Turkey, Malaysia, Qatar, Jordan, Lebanon, Indonesia, Egypt, Kazakhstan, and Tunisia were the top 10 intra-OIC tourism earners in 2013. Altogether these ten OIC countries earned \$31.5 billion, corresponding to 62.9 per cent of the total intra-OIC tourism receipts.

It is also observed that tourist arrivals from other OIC countries accounted for the bulk of the total international tourist arrivals in some OIC countries in 2013, such as Iraq (95.4 per cent), Uzbekistan (88.8 per cent), Kazakhstan (88 per cent), Iran (87.8 per cent), Brunei Darussalam (87.5 per cent), Tajikistan (87.2 per cent), Saudi Arabia (82.6 per cent), Bahrain (75.5 per cent), Kuwait (71.6 per cent), and Tunisia (52.5 per cent) (Figure 3.8) (calculated from the data in Table A.3 and Table A.10 in the Appendix). Yet, this ratio is still below the level of 20 per cent in many OIC countries. It becomes evident that in the OIC countries located especially in the Middle East and Central Asia regions intra-OIC tourist arrivals represent relatively a higher share in total tourist arrivals.



Figure 3.8: Top 10 OIC Countries in terms of the Share of Intra-OIC Tourist Arrivals as a Percentage of Total Tourist Arrivals in 2013



Source: Table A.4 and Table A.5 in the Statistical Appendix

These figures indicate that a significant amount of people travel across neighbouring OIC countries in their respective regions for touristic reasons. However, possession of an extremely high share of intra-OIC tourism arrivals (in total tourism arrivals) may imply that a country is highly dependent on tourist arrivals originating from a few countries mostly located in the same region. Therefore, in case of any turbulence (social, political, or economic) in one country or between two OIC countries in the same region can hit tourism figures severely. In this context, in order to reduce such a risk it is important to consider for those OIC countries that are highly dependent on a few countries in the tourism sector to follow some tourism diversification strategies in order to host more tourists from different OIC geographical regions.

### 3.4 Concluding Remarks and Policy Recommendations

As a group, the OIC member countries have a high potential for the development of a sustainable international tourism sector. This is true given their rich and diverse natural, geographical, historical, and cultural heritage assets. Therefore, international tourism is a very important sector that could, if properly planned and managed, play a significant role in the economic development of the OIC countries. This is due not only 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. However, considering their modest share in the world tourism market and the concentration of tourism activity in a few of them, it seems that the desirable levels of tourism development and cooperation in many OIC countries, and in the OIC region as a whole, have not yet been achieved. Therefore, albeit a crucial factor, the inherent natural tourism resources in OIC countries cannot, per se, make a successful tourism industry unless properly planned and managed.

In fact, the challenges 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. In the case of many OIC countries, these challenges still include the lack of technical know-how and the weak promotional activity. Despite the fundamental awareness and 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. Many OIC countries also 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 tourists with the international standards of tourism facilities and services.

The issue of tourism investments is also an important one. While investment in services is a well-established economic activity in the developed countries, it is still lagging behind in many developing countries. 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 a natural tourism potential, it is still very difficult for some 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. On the other hand, the issue of developing consistent tourism strategies and policies is one of the challenges facing many OIC countries, which are still experiencing difficulties in reaching integrated tourism policy-making due, in general, to policy conflicts between the government departments and the tourism private agencies. This issue is usually coupled, in many cases, with the lack of effective administration, regulation and institutional frameworks of the tourism activity.

Another challenge is the 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, improving the conditions that foster modern tourism development is not an easy process. Last, but not least, is the problem of the lack of tourism safety in some member countries. In this context, it is worth mentioning that the safety of tourists is a primary factor for any successful tourism industry and should, therefore, 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.

However, despite all these challenges 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 those countries. Overall, this necessitates the adoption of articulate long-term

strategies as well as medium to short-term coherent plans and programmes at the national level that would be accompanied by a process of creating a supportive OIC cooperation environment at the regional level. In this context, the following set of recommendations can be proposed at both the national and the OIC cooperation level to serve as policy guidelines to which the attention of the member countries needs to be drawn.

### **At the National Level**

The promotion of sustainable tourism development should be an integral part of the national development plans and strategies. The objectives and programmes of action for tourism development should be focused on the promotion of the economic, social, cultural, and environmental incentives of tourism. Sustainable tourism development strategies should be outlined specifically and formulated in consultation with the private sector and other relevant stakeholders in the tourism sector. Tourism development projects and strategies should consider and include issues of environmental sustainability and poverty alleviation. Governments and the private sector must place increased importance on these issues.

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 should be improved based on international standards to provide world-class services to visitors and tourists. In this context, efforts should be made to create an environment conducive to the safety travel of tourists by establishing and promoting health and safety border security measures, particularly at airports. Special programmes should, therefore, be developed for the national capacity building in tourism sector, particularly tourism administrations and regulations. On the other hand, as an activity that symbolises free movement, international tourism has everything to gain from the greatest possible liberalisation of trade in the services related to it. In this context, efforts should be made to promote synergies between transport and tourism policies to secure greater facilitation of border movements for visitors and to increase national capacities to use the relevant elements of the multilateral trade framework.

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 through strengthening public-private sector cooperation with a view to establishing policies, strategies, and regulations relative to sustainable tourism development. In this context, the planning, management, and marketing of new and diverse tourism products should be improved by the inclusion of socio-cultural programmes and traditional activities involving local communities. In particular, efforts should be made to improve the potential of ecotourism, not only as a sector with great potential for economic development, especially in remote areas where few other possibilities exist, but also as a significant tool for the conservation of the natural environment.

In order to help change people's perceptions regarding tourism and raise their awareness of the opportunities and challenges involved therein, tourism-oriented education should be promoted and developed. This should be accompanied by making efficient use of the mass media and other promotional facilities to publicise and promote existing attractions and available tourism

resources. In this context, training programmes on different aspects of tourism should be provided by national tourism authorities, particularly to people and personnel directly engaged in tourism activities. These programmes should cover a broad range of subjects such as foreign languages, business and e-tourism techniques, the environmental and socio-cultural impacts of tourism, history, national flora and fauna, etc. To facilitate those programmes, actions must be taken to provide local communities with financial and technical support and develop entrepreneurial capacities and managerial skills, especially in small and medium-sized tourism enterprises (SMEs), in order to improve the competitiveness of tourism products and services.

### **At the OIC Cooperation Level**

Joint programmes and promotional materials on tourism in the OIC member countries, such as TV programmes, brochures, posters, and guidebooks should be developed and made available to the member countries as well as to other countries around the world in order to promote the cultural heritage, diversity, and landmarks of the OIC countries at the regional and international levels. In this context, scientific methods of joint tourism marketing and advertisement should be developed and supported by tools that have a major impact on consumers such as the Internet. A proposed example on these tools could be an OIC Internet Guide for Tourism with a view to providing all actors in the tourism sector with comprehensive and updated information on tourism opportunities in the OIC member countries to help increase intra-OIC tourism activities. In so doing, the experience of the EU Internet Guide “EU Support for Tourism Enterprises and Tourist Destinations” could be a useful example.

The establishment of alliances between tourism stakeholders in the OIC countries, particularly between the official tourism promotion bodies, should be encouraged with a view to strengthening tourism marketing and promoting cooperation at the sub-regional level as well as at the level of the OIC region as a whole. Linkages in air, land, rail, and sea transportation should be facilitated and established in order to ease access from one destination to another within the OIC region. In this context, efforts should be made to establish an OIC alliance among the airline companies of the OIC countries with the aim of having direct flights between their capitals and major cities. Meanwhile, tourism visa and other legal and administrative travel procedures should be simplified with a view to easing entry and movement of tourists among the OIC countries and thus enhancing intra-OIC tourism. In this connection, efforts should be made to establish a legal framework towards concluding an agreement on visa arrangements among the OIC countries, including the possibility of issuing an electronic or joint visa.

Last, but not least, efforts should be made to promote and encourage public and/or private joint venture investments in tourism projects through providing special facilities and preferential treatments for investors from the OIC countries. Joint training/vocational programmes on various aspects of the tourism industry should also be developed and organised by the relevant training institutions in the OIC countries. Linkages or networks among tourism training institutions in the member countries should be established to facilitate the exchange of experts and research on tourism development.



## 4 New Directions in the Tourism Sector: Islamic Tourism in the OIC Countries

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Over the last two decades, Islamic life style market has been growing as sharia'h compliant products and services (e.g. halal food, Islamic tourism and Islamic finance) have become an important component of the global economy. With an increasing awareness and expanding numbers of Muslim tourists, many tourism industry players have started to offer special products and services, developed and designed in accordance with the Islamic principles, to cater the needs and demands of these tourists. Nevertheless, despite attracting significant interest across the globe, Islamic tourism is relatively a new concept in both tourism theory and practice. Not surprisingly, Islamic tourism activity remained highly concentrated in Muslim majority countries of the OIC, which are currently both the major source markets for the Islamic tourism expenditures and popular destinations. Islamic tourism is a natural-fit for these countries as the majority of them already have basic infrastructure and environment in place to cater for the specific needs of Muslim tourists, and thus, have a comparative advantage over the others. Therefore, it is true to believe that, if planned and managed properly, Islamic tourism could play a vital role in revitalising the economic development and growth and hence, spread the prosperity across the OIC countries.

Against this backdrop, this section aims to provide a candid theoretical discussion on the definitions and dimensions of Islamic tourism by sifting through the tourism literature and reviews the emergence and status of Islamic tourism industry in the world in general and in the OIC countries in particular by analysing the latest available information and statistics. A subsection also provides a brief discussion on major challenges and opportunities for the development of Islamic tourism in OIC countries. At the end, some specific policy recommendations have been listed for the consideration of the OIC countries both at national and OIC cooperation level and the major stakeholders of tourism industry.

### 4.1 Islamic Tourism and its Components

#### Islam and Tourism

Travelling and journey are highly recommended by the Qur'an. Allah asked us to travel through the earth to take the lessons from His creation that He offers to us in His mercy (*Al-Quran* 29:20). It is a well-established fact that religion has influence on the day-to-day activities of Muslims, whether at home or travelling, and thus it shapes the choice of a destination for discretionary purposes and what is done at the destination (Jafari and Scott, 2014). Islam recognizes people's right to move from one place to other and encourages travelling for beneficial purposes including Hajj and Umrah (literally the higher and lesser pilgrimages, respectively), health and medication, education, business, trade, entertainment, and fun. However, words like "fun" and "entertainment" should be interpreted with caution as Muslims are allowed to seek fun and entertainment only in a way that does not go beyond the rules and obligations of Islamic Sharia'h (Saad et al, 2010). Therefore, in this context, tourism policy, development objectives and

the management and operation of the industry will be greatly influenced by the Islamic principles (Scott and Jafari, 2010).

### Islamic Tourism: Definitions and Dimensions

As it is evident from the name, Islamic tourism is mainly targeting people with Islamic beliefs in particular, though it could also have a universal appeal even for the non-Muslims due to a multitude of reasons like fair pricing, peace and security, family-friendly environment and hygiene etc. Islamic tourism as a concept has been used with different names and connotations in the tourism theory and practice. Halal tourism, Sharia'h Tourism and Muslim-friendly tourism are the most common terms, which are used alternatively. However, none of these terminologies has a universally understood definition (Crescent Rating, 2015). Moreover, there are some related terms such as 'Halal hospitality', 'Sharia'h compliant hotels', and 'Halal friendly travel' concerning the services in this sector.

#### Box 1: Major Components of Islamic Tourism

**Halal Hotels:** Some of the main indicators of an Islamic hotel include: No alcohol, gambling etc.; Halal food only; Quran, prayer mats and arrows indicating the direction of Mecca in every room; Beds and toilets positioned so as not to face the direction of Mecca; Prayer rooms; Conservative staff dress; Islamic funding; Separate recreational facilities for men and women.

**Halal Transport (Airlines):** Major indicators for halal transport include: cleanliness; non-alcoholic drinks; and publications which are coherent with Islam.

**Halal Food Premises:** Foods that served in a restaurant have to be halal. All animals must be slaughtered according to Islamic principles. No alcoholic drinks should be served in the premise.

**Halal Tour Packages:** The content of the tour packages must be based on an Islamic themed. The Islamic tour packages include visits to the mosques, Islamic monuments and promote and event during the Ramadan.

**Halal Finance:** The financial resources of the hotel, restaurant, travel agency and the airlines have to be fit with Islamic principles. In general, Islamic finance requires participation in sharing the profit and loss among of all parties who involved in this finance enterprise. Islamic finance also prohibits interest.

*Source:* Adapted from Akyol and Kilinc, 2014.

The major components of Islamic tourism are similar to those of conventional tourism like hotels, restaurants, logistics, finance, and travel packages. Evaluation of the value of tourism products in case of Islamic tourism, however, entails a completely different process due to the requirements of the Islam. These requirements are called Sharia'h-principles and at the simplest level, these principles "prohibit adultery, gambling, consumption of pork and other Haram (forbidden) foods, selling or drinking liquor and dressing inappropriately." In addition, a typical Muslim is expected to do regular prayers in clean environments and fast in Ramadan. In Islamic teachings, Muslims are also expected to abstain from unnecessary consumption and indulgence. In principles, Islamic tourism is about satisfying tourists looking for a destination that can fulfil their needs without being offensive in any way. It covers all tourism related goods and services that are designed, produced and presented to the market according to the Islamic rules (Hamza et al., 2012). Muslim

tourists usually travel with family members and therefore, this concept is tailored around the travel needs of Muslim tourists who predominately seek a family friendly environment (Dinar Standard, 2015). All destinations that provide services and facilities that cater to at least some of the faith-based needs of Muslim visitors are categorised as 'Muslim Friendly Destinations' (Crescent Rating, 2015). At these destinations, tourists can count on feeling safe and secure, and can enjoy family-centred halal activities and have good time without worry. It may sound too good to be true, but there are many such places at both Muslim and non-Muslim locations.

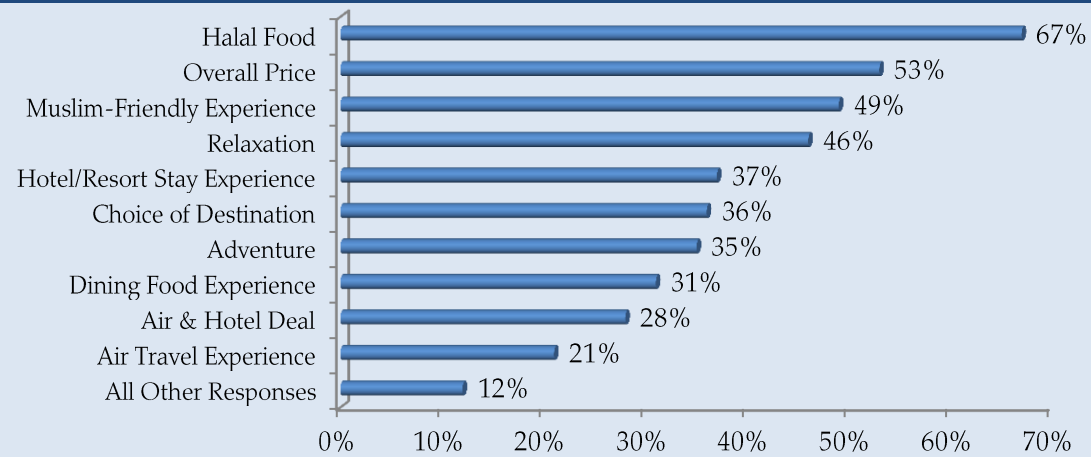
The motivation for the Muslims to participate in tourism activity can be general (e.g., conducting business, visiting friends or relatives), pursuing other personal goals and activities (e.g., education, shopping) and pleasure, and/or specific Islamic motivations (e.g., spreading the message of Islam, Islamic values and culture, worshiping Allah (through Hajj and Umrah), strengthening the bond of silat al-rahim (fraternity) etc. Most of the general motivations are common for Muslims and non-Muslims. However, certain motivations for tourism which provoke pure hedonism and lavishness are not acceptable according to Islamic doctrine and these motivations can be considered non-Islamic or haram (Duman, 2011).

There is also a wide diversity in awareness and adoption of various Islamic practices by Muslim travellers. A significant number of Muslim tourists travel to global non-Muslim destinations such as Europe and adjust to any limitations by seeking alternatives to Halal Food, as well as other religious considerations such as prayer spaces, etc. Meanwhile, a big segment travelling globally is also seeking options that address their religious considerations (Thomson Reuters and Dinar Standard, 2015). In a global survey jointly conducted by Dinar Standard and Crescent Rating, halal food, overall price and Muslim-friendly experience were ranked among the top-3 Muslim tourist market needs (Figure 4.1). While a large segment of Muslim tourists looking for these services, very few hotels, airlines and tourism destinations in fact tried to meet their demands.

Of course, while developing a strategy to address the Islamic tourism market, all major stakeholders like destinations, hotels and resorts, airlines and travel agencies need to consider the size of the flow of Muslim visitors to their destination. They also need to consider which faith related needs they will cater to. Basic needs such as Halal food, absence of alcohol, prayer spaces and Ramadan accommodation are a must for Muslim majority countries. Additional options include providing "women only" facilities, and incorporating Islamic heritage tours, among other options (Dinar Standard, 2015).



Figure 4.1: Main Factors that Affect the Decision of Muslim Tourists When Travelling For Leisure



Source: DinarStandard, 2015

### Box 2: Broad Concepts of Islamic Tourism

**Economic concept:** The economic concept for the Islamic tourism focuses on inclusion of new tourist markets and tourist destinations. This concept is the most widely discussed and understood in both Islamic and non-Islamic countries. Major tourism players, consider Muslim countries as one of the emerging tourist markets with huge economic, demographic and destination potentials. There are many regional and international forums like Islamic Conference for Ministers of Tourism (ICMT) and the Arab Counsel of Ministers of Tourism (ACMT) to discuss and elaborate on economic dimensions of the Islamic tourism market. The third meeting of ICMT presented a new vision in this regard by adopting the “Riyadh Declaration”, which aims to ease the visa, enhance the intra-OIC tourism investment, organize joint marketing events and facilitate the revival of Islamic cultural heritage.

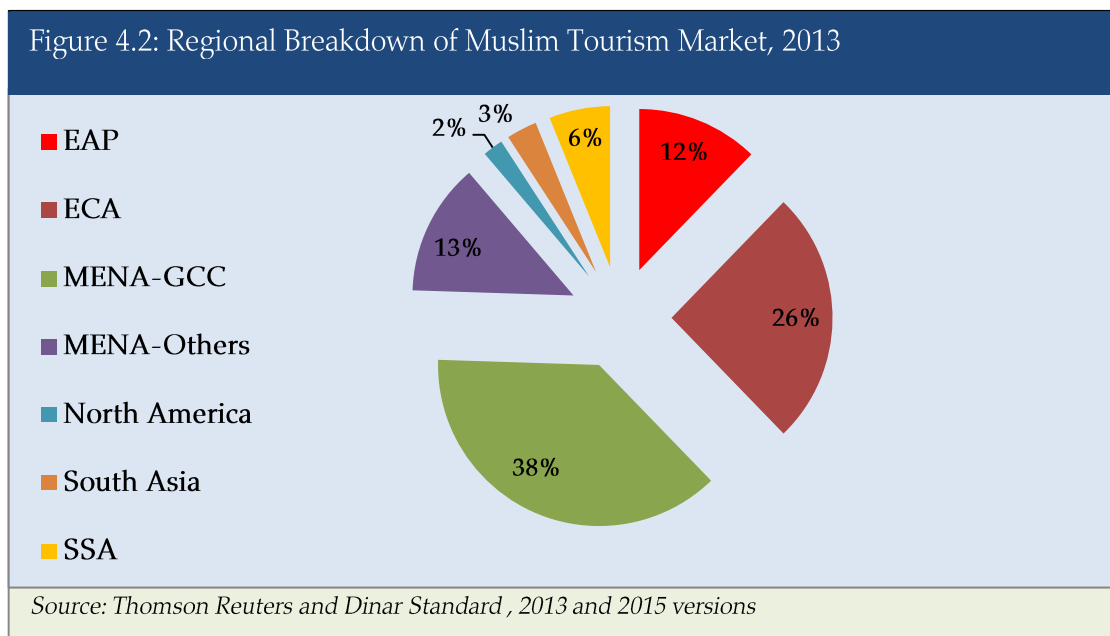
**Cultural concept:** The cultural concept for Islamic tourism includes visions and ideas that outline the inclusion of Islamic religious cultural sites in tourism programs with “pedagogical” and self-confidence building elements. It tries to encourage a reorientation inside the tourist destinations towards less consumption and “western culture” loaded sites towards more Islamic historical, religious and cultural sites.

**Religious conservative Concept:** The religious conservative concept for Islamic tourism is based on the conservative interpretation and understanding of Islam. Merging elements of the extremely conservative Islamic lifestyle with the modern tourism industry could indeed present new tourism options, spaces, and spheres. For a growing conservative intra Arab and intra Muslim tourism market, the implementation of a religious conservative concept in tourism planning as an extra option and as an insertion into the existing mainstream tourism could indeed have a positive economic and social effect.

## 4.2 State of Islamic Tourism in the OIC Countries

Islamic tourism is a recent phenomenon in the theory and practice of global tourism industry. Traditionally Islamic tourism was often associated with Hajj and Umrah only. However, recently there has been an influx of products and services designed specifically to cater the business and leisure related segments of Muslim tourists across the globe. The Muslim tourism market has witnessed rapid growth over the years and emerged as one of the fastest growing segments of the global tourism market. According to the latest estimates, Muslim tourism market (excluding the Hajj and Umrah expenditures of \$20 to \$25 billion) has increased from around \$80 billion in 2006 to \$145 billion in 2014, corresponding to an impressive increase of 81 per cent (Crescent Rating, 2015). Despite recording impressive growth over the years, Islamic tourism remained as an emerging niche market with 108 million Muslim travellers, accounting for 10 to 12 per cent of the global tourism sector. Currently, with an annual growth rate of 4.8 per cent, Muslim tourism market is growing faster than the global tourism market, which recorded a growth rate of 3.8 per cent in 2013. Provided the estimated exponential growth in Muslim population and positive economic prospects for many Muslim majority countries, Islamic tourism market is forecasted to grow to \$200 billion with 150 million tourists by the end of 2020 (Crescent Rating, 2015).

The regional breakdown of the global Islamic tourism market reveals that it is highly concentrated in the Middle East and North Africa (MENA) region (Figure 4.2). In 2013, MENA region accounted for half of the total out bound tourism expenditures made by the Muslim tourists. Among other regions, Europe and Central Asia (ECA) accounted for the second largest share of 25 per cent followed by East Asia and Pacific (EAP, 12 per cent) and Sub-Saharan Africa (SSA, 6 per cent).



### Major Source Markets for Islamic Tourism

The 57 Member Countries of the OIC are the major source market for the global Islamic tourism industry. According to the latest estimates, more than three quarters (78 per cent) of the total 1.62

billion Muslims reside in the OIC countries. With estimated tourism expenditures of over \$100 billion, these countries account for around 82 per cent of the total Muslim travel expenditures in 2013-2014. Nevertheless, Muslim tourists and tourism expenditures remained distributed unevenly across the OIC countries. Unsurprisingly, the resource rich OIC countries in the Middle East remained the major source markets for the Islamic tourism. Among these countries, members of the Gulf Cooperation Council (GCC) emerged as the star performers with a convincing 37 per cent share of global Muslim travel expenditures. It is worth noting that GCC countries represent only 3 per cent of the global Muslim population (Dinar Standard and Crescent Rating 2012).

Currently, the top-20 global Muslim tourism source markets spread across the four continents, accounting for over three quarters (76 per cent) of the global Islamic tourism market in 2013-2014. The primary top source markets, in fact, are concentrated in the Muslim majority OIC countries. As shown in Table 4.1, 14 out of 20 top markets are the OIC countries whereas six of them are Muslim minority countries from the Europe and America.

Saudi Arabia was ranked first with Muslim tourism expenditures of \$17.8 billion followed by Iran (\$14.3 billion), United Arab Emirates (\$11.2 billion), Qatar (\$7.8 billion), Kuwait (\$7.7 billion), Indonesia (\$7.5 billion) and Malaysia (\$5.7 billion). These top seven source markets accounted for more than half of the total Muslim tourism expenditures. On the other hand, among the six Muslim minority source markets, Russia accounted for the largest share with \$5.4 billion Muslim tourism expenditures followed by Germany (\$3.6 billion), United Kingdom (\$2.4 billion), Singapore (\$2.3 billion), France (\$2.3 billion) and United States (\$2.0 billion). As a group, these countries accounted for around 12 per cent of the total Muslim tourism expenditures during 2013-2014.

Table 4.1: Top-20 Source Markets for Islamic Tourism, 2013-2014

Rank	Country	Size (US \$ Billion)	Rank	Country	Size (US \$ Billion)
1	Saudi Arabia	17.8	11	Germany	3.6
2	Iran	14.3	12	Egypt	2.8
3	United Arab Emirates	11.2	13	Azerbaijan	2.4
4	Qatar	7.8	14	United Kingdom	2.4
5	Kuwait	7.7	15	Singapore	2.3
6	Indonesia	7.5	16	France	2.3
7	Malaysia	5.7	17	Iraq	2.2
8	Russia	5.4	18	United States	2
9	Turkey	4.5	19	Morocco	2
10	Nigeria	4.4	20	Lebanon	1.9

Source: Thomson Reuters and Dinar Standard

## Major Islamic Tourism Destinations

In the global tourism market, Europe is the most popular region in terms of number of arrivals. At the country level, France tops the list of the most popular destinations, followed by USA, Spain and China. Among the OIC countries, Turkey and Malaysia are ranked among the top global tourist destination. At the OIC level, Turkey is the most popular tourism market followed by Malaysia, Saudi Arabia, Morocco and United Arab Emirates.

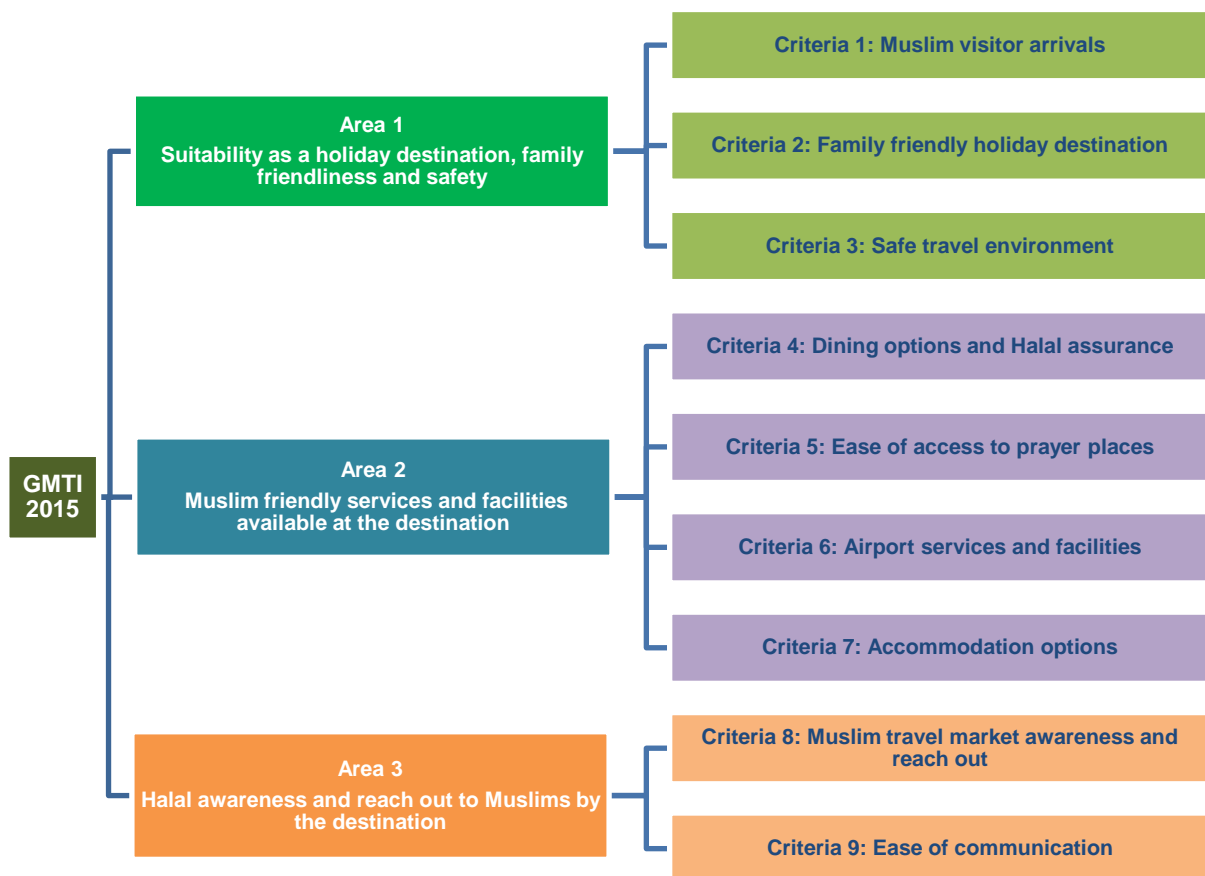
The above mentioned rankings of the top tourist destinations are largely based on the conventional tourism criteria without giving due consideration to the fundamental requirements of the Islamic tourism. Over the years, several institutions have embarked on initiatives to develop special criteria to evaluate the performance of tourism destinations with respect to the compliance with the requirements of the Islamic tourism and rank them accordingly. One of the most famous and premier initiatives is the *Master Card-Crescent Rating Global Muslim Travel Index (GMTI)*.

GMTI is made of several factors that constitute the Muslim tourists experience at a destination. As shown in Figure 4.3, this index looks at nine criteria in three areas for a destination. Each area is given specific weight according to its relevant importance. In GMTI 2015, each of the Area 1 and Area 2 was assigned 40 per cent weight whereas Area 3 accounted for 20 per cent of the index score for a destination. Overall, 110 countries were studied and ranked for the GMTI 2015. The top-100 countries, which include 29 OIC countries, accounted for over 95 per cent of the total Islamic tourism market in 2014.

According to the results of the GMTI 2015, Malaysia topped the index ranking with a cumulative score of 83.3. It was followed by Turkey with a score of 73.8 and UAE with a score of 72.1 (Table 4.2, left). In fact, nine out of the global top-10 Islamic tourist destinations are OIC members. Given the fact that the OIC countries have a comparative advantage mainly due to by-default existing Muslim friendly facilities and services, it is not surprising. Nevertheless, there is a strong need for proactive policies and measures in the OIC countries to capitalise on existing pro-Islamic tourism environment and converting their comparative advantage into competitive advantage. In fact, most of the OIC countries are lacking basic requirements and coherent strategies to fully maximise their attractiveness to Muslim tourists (Master Card and Crescent Rating, 2015).

In contrast, many Muslim minority countries have made significant progress in catering for the needs and demands of Muslim tourists. Among these countries Singapore, Thailand, UK, South Africa, and France are top-5 non-OIC Islamic tourism destinations (Table 4.2, right). With a cumulative score of 65.1, Singapore is ranked even higher than the popular OIC destinations like Morocco and Brunei. In fact, majority of these non-OIC top Islamic tourism destinations are characterised by excellent tourism infrastructure and products and hence, sometimes they need very minimal changes in their strategies to cater for the needs of the Muslim tourists (Master Card and Crescent Rating, 2015).

Figure 4.3: Composition of the Global Muslim Travel Index (GMTI)



Source: MasterCard and Crescent Rating, 2015

Table 4.2: Top 10 OIC and Non-OIC Islamic Tourism Destinations

GMTI 2015 Rank	OIC Destination	Score	GMTI 2015 Rank	Non-OIC Destination	Score
1	Malaysia	83.8	9	Singapore	65.1
2	Turkey	73.8	20	Thailand	59.2
3	United Arab Emirates	72.1	25	United Kingdom	55
4	Saudi Arabia	71.3	30	South Africa	51.1
5	Qatar	68.2	31	France	48.2
6	Indonesia	67.5	32	Belgium	47.5
7	Oman	66.7	33	Hong Kong	47.5
8	Jordan	66.4	34	USA	47.3
10	Morocco	64.4	35	Spain	46.5
11	Brunei	64.3	36	Taiwan	46.2

Source: MasterCard and Crescent Rating, 2015

### 4.3 Challenges and Opportunities for Islamic Tourism

Islamic tourism is a very recent phenomenon. Despite all the positive developments, the Islamic tourism market is still fragmented by the diversity of the meaning of halal, income level, awareness level, location and religion and ethnicity. These are some of the main stumbling blocks to enhancing Islamic tourism activity in the OIC countries. Some of the specific challenges that limit the development of Islamic tourism in the OIC countries and available opportunities ahead of the OIC countries for the development of Islamic tourism market are listed below.

#### Challenges

**Lack of unified and global standards and certification:** There are no unified international halal standards and certification arrangement for the tourism industry. In fact, in the majority of the OIC countries, there is no official body available at the national level to certify hotels and destinations according to the Islamic requirements. Meanwhile, a Singapore based private company named Crescentrating pioneered the halal friendly travel certification by rating hotels/resorts against a five-level Crescentrating Standards.

**Financial Constraints:** As a new emerging segment of global tourism industry, Islamic tourism has not received enough financial resources, perhaps, with growing number of success stories investors will give due attention to this niche segment by considering its potential and growing market size.

**Gender:** In many Muslim majority countries, female employment in the tourism sector is a problem due to various social and cultural reasons. Furthermore, women are also not allowed to travel alone in certain Muslim countries. Thus, a significant proportion of the global Muslim population is by-default eliminated from the Islamic tourism market.

**Differences in the influence of Islamic values and beliefs:** There is significant variation across the OIC countries regarding the understanding and influence of the Islamic values and beliefs. These existing differences are also reflected in their tourism development policies. While, some OIC countries are more relaxed and welcoming towards the tourists, some others are more conservative and less interested.

#### Opportunities

**Islamic tourism potential for economic growth:** Provided the fact that many OIC countries already have basic infrastructure and environment for catering to the requirements of the Muslim tourists, they can benefit more from the Islamic tourism market. Therefore, development of Islamic tourism could play a vital role in the economic growth and prosperity in these countries.

**Innovative tourism products:** There are opportunities for the OIC countries to bundle traditional pilgrimage and religious travel experiences with the activities related to culture and heritage to make unique and innovative tourism packages. For the destinations with Islamic and heritage sites, there is a growing opportunity to develop and market their potential by designing Muslim-friendly cultural tour packages.

**Social Media:** Internet and social media provide a significant communication platform for introducing, positioning and marketing of the Islamic tourism brands, products and services to a wider audience.

#### 4.4 Concluding Remarks and Policy Recommendations

There is a convergence of common interest-religious, political, economic, social, and cultural-that is now clustering around the concept of Islamic/Halal tourism, and all that it implies. There is an increasing level of awareness about the social, economic and cultural potentials of the Islamic tourism at the top policy makers' level. In fact, tourism is an important constituent of the OIC development agenda and over the years, several conferences and forums including eight Ministers level conferences have been organized to highlight the major issues and challenges facing the development of tourism in OIC countries and formulate policy actions to address these challenges. Development of Islamic tourism has also gained greater importance on the agenda of the OIC and the First OIC International Forum on Islamic Tourism was organized in Jakarta, Indonesia on 2-3 June 2014.

In this context and in the light of the discussion in this section, some policy recommendations could be made for the consideration of the OIC countries at both national and OIC cooperation level, and the major stakeholders of tourism industry.

##### At the National and the OIC Cooperation Level

**Harmonization of policies and guidelines:** There is a need for working out modalities and findings ways and means to harmonize the Islamic Tourism policies and guidelines in order to promote development of Islamic tourism and better cooperation among the OIC countries.

**Sharing of expertise and experiences for the development of Islamic tourism:** Among the OIC countries, there are some examples of successful Islamic destinations like Malaysia, Turkey and United Arab Emirates. Efforts should be made to facilitate the transfer of knowledge and exchange of expertise among the emerging Islamic tourism markets and the top performing countries.

**Cooperation for making a positive image:** Peace and security are the most important elements for tourism development. Due to political instability and civil conflicts in some OIC countries, there is an overall negative global media positioning of these countries. Furthermore, the phenomenon of Islamophobia is also on the rise across the globe. There is a need for joint action and cooperation at the OIC level to counter the negative media publicity and address the growing Islamophobia by highlighting the cultural and religious values and contributions of the Muslims to the history, culture, architecture and art. This will help not only in positive image building and but also pave way for the development of Islamic tourism.

**Organizing Islamic tourism events:** There is a need for special conferences, workshops and forums at both OIC and national levels to introduce and advertise the Islamic tourism related products and services. Furthermore, events should also be organized to gather the major stakeholders in Islamic tourism market to share their experiences and best practices and brainstorm the joint future policies and strategies.

**Utilizing the media:** Media can play an important role to foster and propagate Islamic tourism activities. To this end, the OIC countries should consider establishing dedicated satellite TV channel(s); publish special editions of popular magazines on Islamic tourism and launch large-scale social media campaigns.

**Designing long-term strategies and master plans for the development of Islamic tourism market:** Being the major source markets and beneficiaries of Islamic tourism, the OIC countries should develop a comprehensive; evidence based and long-term strategies for the development of a sustainable Islamic tourism sector at both national and OIC level.

### At the Industry Level

**Ensuring Halal:** Take necessary measures to ensure that all products and services provided for a halal conscious tourist are in accordance with the Islamic principles;

**Training the staff:** Train, educate and inform the staff and guides about the Islamic values, teachings and principals;

**Facilitating the access:** Prepare printed maps or develop applications that indicate the locations of mosques or prayer facilities, halal food restaurants and other related services;

**Paying attention to diversity:** Destination marketers need to identify and address the Islamic culture of different nationalities in order to be able to design packages that cater for their specific needs;

**Proper accommodation management:** Arrange the accommodation according to the Muslim needs like equipping every room with a pointer to direction of Qibla, providing praying mats and facilitating congregational prayers;

**Information about halal food:** Be well informed about the Halal food premises as one of the most important concerns for the majority of Muslim travellers. Get appropriate certification for halal food;

**Offering gender specific facilities:** Arrange separate entertainment facilities like swimming pools and Spas for women and men;

**Appropriate dress code for the staff:** Develop an appropriate dress code for the staffs serving in hotels and other tourist services centres;

**Suitable marketing strategies:** Develop and apply suitable marketing strategy in compliance with the Islamic teachings and morals for the advertisement and promotion of the Islamic tourism products and services.



**Box 3: Highlights of the Key Islamic Tourism Markets****Malaysia**

Malaysia leads the GMTI ranking by a big margin from the rest of countries. Large inbound Muslim traveller base relative to its size, strong Halal-friendly ecosystem and high level of awareness and promotion of Islamic tourism drives the top ranking of Malaysia. Islamic tourism is a major segment of Malaysian economy and the Ministry of Tourism has established the department of Islamic Development of Malaysia to promote Islamic tourism. Most of the tourists in Malaysia come from China and other Asia Pacific countries. However, the Government is aggressively expanding its reach by easing the visa restrictions for many OIC countries and targeting MENA market based on its credentials as an exotic yet 'Muslim-friendly' destination, with credible Halal food supply as well as family friendly entertainment and environment. Some of the major Islamic tourism players in Malaysia include:

LSG Sky Chefs -Brahim's Sdn Bhd is a co-owned subsidiary of Brahim Holding Bhd, a global halal food catering company, and Malaysia Airlines, which certifies in-flight kitchen facilities. They also plan to provide technical support to foreign in-flight caterers in China and the Middle East to certify their in-flight kitchens as halal.

Star Cruise refurbishes and operates cruise ships to house halal restaurant to attract more Muslim tourists from Malaysia, Indonesia and the Middle East. The restaurant is halal-certified by JAKIM, Malaysia's official Halal Certification Body. In 2013, JAKIM announced a 39 per cent increase in applications for halal certificates for hotels and food premises.

Malaysia as a top destination for Muslim travellers has worked hard to become a medical tourism hub. Currently, most of the medical tourists come from Indonesia, and the Middle East and North Africa. At the hospitals, female doctors usually treat female patients and there are facilities for prayer.

**Turkey**

Turkey is quite rich in tourism potential. Its geographic location, climate, the multicultural nature of its demographics and diverse history make it one of the most attractive destinations in the world. Currently, it is ranked as the second most popular destinations for the Muslim tourists. Family-friendly Islamic tourism market is growing fast in Turkey with strong domestic and inbound travel demand.

Turkish Airlines is growing rapidly in a bid to become a transport hub serving Europe, Africa, the Middle East and Asia. In terms of halal food, the airline states on its website that all meals served on their flights are in accordance with Islamic religious beliefs. The hub airport for Turkish Airlines, Ataturk International Airport in Istanbul is one of the fastest growing airports in the world. In general, basic Muslim needs are largely catered at the airport.

Many hotels in Turkey offer conservative holidays targeting the affluent and pious Muslim population. Among these hotels and Bera Hotel are the most famous one. Sultan Beach Hotel offers quite a number of Muslim-friendly services like halal food, separate pool for women, prayer facilities and ban on alcohol. Bera Hotel in Alanya has an open-air, ladies-only pool on the top floor to which access is strictly guarded; the elevators leading up to the pool are female only and no camera phones nor are boys aged over six are allowed. On the beach, women are required to dress modestly and only burkinis (the full Muslim swimsuit) are welcomed. The resort includes many family-friendly services like children's pools etc. All rooms include a Quran, a prayer rug and prayer beads and a Qibla pointer. Digital displays in the lifts and lobby indicate accurate prayer times and there is a mosque in the hotel.

**United Arab Emirates**

UAE is one of the fastest growing Islamic tourism travel destinations and. Building on its Islamic heritage and strategic location, UAE scores high on its Muslim friendly ecosystem and awareness and promotion of tourism for the Muslim travellers.

Abu Dhabi's Tourism and Culture Authority is working with travel companies to promote Islamic heritage tourism packages. Sharjah has been chosen as the Capital of Arab Tourism for 2015 and is expected to organise an Islamic Travel Summit by the end of 2015. Through this Summit, it also aims to promote co-operation within OIC member states in the travel sector. Dubai is continuing its promotion to attract travellers by promoting its Halal credentials as well as a family-friendly shopping destination.

Emirates Airline received the "World's Best Airline" award from Skytrax in 2013. Emirates Airlines has announced plans to increase its fleet of 200 aircraft by 25 percent over four years. In terms of Muslim friendliness, all meals on Emirates flights are halal. The hub airport for Emirates Airline, Dubai International Airport, is the second fastest growing airport in the world. At the airport, separate prayer rooms are available for men and women with built-in wudhu facilities, and there are arrangements for offering the Friday prayers in the airport premises.

Al Jawhara Group of Hotels and Apartments is a Muslim-friendly enterprise in UAE. All hotels are alcohol free and have a separate swimming pool for women along with a separate gym. All female staff is required to wear hijab. Hotels offer a wakeup call service for the Fajr prayers and provide a printed prayer schedule. The television channels are also family friendly.

UAE aims to start the halal certifications for the travel and tourism industry and the work on regulations to certify halal products, including food, travel, clothes, cosmetics, pharmaceuticals, media, and art is close to finish.

*Source: Thomson Reuters and Dinar Standard, 2013, 2015, 2015a; Duman, 2011.*

## 5 The Role of Public Private Partnerships (PPPs) for the Development of the Tourism Sector in the OIC Countries

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Like in the case of any other sectors in the economy, the development of sustainable tourism sector, through enhancing long-term quality and competitiveness of tourism destinations, necessitates effective and coordinated involvement of both the public and private sector. However, it is most often the case that these two sectors are working independently, particularly in the developing countries. In this context, the experience has shown that if these two forces come together to work synergistically for the development of the tourism sector, the value could be exponential. The way to make this happen is the effective Public-Private Partnerships (PPPs).

In the light of this understanding, this section briefly summarises some basic concepts related with PPPs and presents an overview on the partnership areas between public and private sector. It also lists the benefit and risk factors associated with PPPs, especially in the tourism sector, and provides some examples from the experience of some OIC countries with PPPs in the tourism sector.

### 5.1 Public-Private Partnerships (PPPs)

Over the past several decades, tourism industry has experienced continued expansion and diversification, becoming one of the largest and fastest-growing economic sectors in the world. An ever increasing number of tourism destinations worldwide have opened up to, and invested in tourism, turning tourism into a key driver of socio-economic progress through export revenues, the creation of jobs and enterprises, and infrastructure development. There is, however, still a long way to go, particularly in low-income countries, in terms of sectoral development. Despite very favourable initial conditions with regard to tourism attractions, many profitable projects that could contribute to the development of the sector as well as the country remain unrealized due to inadequate investment.

On the other hand, there is an increasing interest in cooperation between public and private sectors to promote development within a country. Public Private Partnership (PPP) involves collaboration between public and private sector to fulfil a long-term goal, usually for a social and economic infrastructure project that will lead to the development of an area or region. In practice, such partnership agreements are mainly used to finance the building and operation of hospitals, schools, roads, rail networks and airports. Since the development of the tourism sector commonly requires substantial amount of initial investments, PPP could be suggested as a viable model to finance tourism projects where tourism projects are financed and operated through a partnership of government units and private sector agents.

PPPs can be attractive to both the government and the private sector. For the government, private financing can support increased infrastructure investment without immediately adding to government borrowing and debt, and can be a source of government revenue. At the same time, better management in the private sector and its capacity to innovate can lead to increased efficiency and bring better quality and lower cost services. For the private sector, PPP's present business opportunities in areas from which it was in many cases previously excluded as well as expansion of products and services beyond their current capability. PPPs, therefore, enable the public sector to benefit from entrepreneurial dynamism, extended financing opportunities in an

Table 5.1: Functions and Responsibilities of Public-Private Partnerships (PPPs)

Public Sector	Private Sector
<ul style="list-style-type: none"> <li>• Having a vision for tourism</li> <li>• Provide a favourable environment for tourism, which allows sustainability and profits for the private sector, offering free capital flow and facilitating investments</li> <li>• Ensure proper infrastructures and their maintenance</li> <li>• Generate sufficient market conditions to stimulate the sustainable development of tourism</li> <li>• Provide support, favourable terms and services to the private sector, along with incentives</li> <li>• Ensure a flexible labour legislation</li> <li>• Ensure steady regularization and a fair tax policy</li> <li>• Provide a regulating model through consultation with all stakeholders, for the protection of natural, cultural and social environments</li> <li>• Ensure local communities' well-being, as well as the well-being of domestic and international visitors</li> <li>• Carry on research initiative, in cooperation with the private sector, for the supply of information about markets to the industry and the community of investors, to improve the perception and understanding of market changes</li> </ul>	<ul style="list-style-type: none"> <li>• Understand the environmental and social concerns of governments and local communities</li> <li>• Develop skills and competences, access to finance for development and operation of tourism services</li> <li>• Assume collective responsibility for spreading and practising industry standards, considering ethics, moral and justice</li> <li>• Contribute to preserving culture, traditions, and environment, leading the education and orientation of tourists, as a fundamental directive for the sustainable development of the sector</li> <li>• Involve local communities in tourism development and assure they are satisfied with the benefits directed to them</li> <li>• Develop measures for training professional labour skills, in order to achieve excellence in service quality</li> <li>• Cooperate with governments to ensure the safety and well-being of tourists</li> <li>• Contribute to the development of research and creation of statistical databases</li> <li>• Resort to technologies, in order to increase the effectiveness of operations, tourism marketing and service quality</li> </ul>

Source: UNWTO (2000)

environment of budgetary constraints, innovative and efficient management styles of the private sector who contributes their own capital, skills and experience.

In an agreement between public and private sectors in tourism, parties can assume different roles to contribute the development of the industry. UNWTO (2000) provides a list of the functions and responsibilities of the different bodies involved in public-private partnerships in tourism. As provided in Table 5.1, while public sector has overall vision on the development of the sector, private sector usually has better understanding of the environmental and social issues. While governments improve the framework conditions, private sector can increase the efficiency and productivity by investing on skills upgrading and capacity building. There are clearly a number of functions and responsibilities that can be undertaken by different partners to enhance the tourism sector development.

## 5.2 Partnership Areas between Public and Private Sectors in the Tourism Sector

Governments traditionally play a key role in the development of tourism and in the promotion of their countries as tourism destinations, because it is governments themselves that identify tourism as a possible means to achieve economic development. There is always a need for public sector support for the development of the industry, particularly in developing a suitable physical, regulatory, fiscal and social framework as well as providing basic infrastructure including roads, airports and communications. However, governments around the world are increasingly transferring some of their traditional responsibilities and activities to local authorities and the private sector. Their role in the development of the industry is increasingly limited to certain critical activities at critical times. In certain times, the public sector might be required to facilitate investment—by assisting private entities to overcome initial barriers and providing much-needed financial solutions to initiate a major tourism project. In other times, an infusion of private capital and management can ease fiscal constraints on infrastructure investment and increase efficiency.

Identification of potential partnership areas is also a critical step in establishing PPPs. A study of the UNWTO (2000) included a survey distributed to representatives of the public and private sectors. According to the respondents, the most critical areas for PPPs within the tourism industry are improving destination image and preserving cultural and heritage resources. Education and training, safety and security, and environmental protection were also among the highest priorities identified by the respondents. In general, a public-private partnership offers new possibilities for the development of tourism in different fields. UNWTO (2003) identifies some potential partnership areas in product development, marketing and sales, research and technology, infrastructure, human resources and financing, as provided in detail in Table 5.2.

The main area in which public-private partnership has traditionally developed is that of marketing and promotions, because private sector activities are considered to be more entrepreneurial and effective. In addition to this, infrastructure and product development, education and training, financing and investment are other areas where partnership can contribute to development of tourism sector as a competitive industry. It is observed that private sector is increasingly involving

in operating key public utilities including airports and national heritage buildings. It is also important to enhance cooperation in addressing some key issues of concern, such as safety and security, health, environment, culture and heritage.

Table 5.2: Partnership Areas Between Public and Private Sectors

Product development	<ul style="list-style-type: none"> <li>•Development and preservation of resources;</li> <li>•Establishment of quality standards;</li> <li>•Development of attractions, theme parks and accommodation;</li> <li>•Provision of technical support to programmes for the development of innovative products;</li> <li>•Contribution to the economic wealth of the community;</li> <li>•Realization of sustainable development in the tourism sector;</li> <li>•Overcoming trade and investments barriers;</li> <li>•Protection of consumers;</li> <li>•Dealing with competition.</li> </ul>
Marketing and sales	<ul style="list-style-type: none"> <li>•Improving the destination's image;</li> <li>•Improving marketing efficiency;</li> <li>•Improving market coverage and reach;</li> <li>•Supporting electronic marketing and distribution, including the internet;</li> <li>•Supporting participation in trade fair and events;</li> <li>•Strengthening joint marketing programmes;</li> <li>•Accessing new markets.</li> </ul>
Research and technology	<ul style="list-style-type: none"> <li>•Providing methodologies for research and measurement;</li> <li>•Implementing tourism satellite accounts;</li> <li>•Stimulating technological innovations and their application.</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>•Improving roads, transport infrastructure and basic services;</li> <li>•Promoting intermodal transport;</li> <li>•Improving public health and sanitation;</li> <li>•Improving safety and security;</li> <li>•Strengthening the telecommunications system.</li> </ul>
Human resources	<ul style="list-style-type: none"> <li>•Establishing standards for services and quality;</li> <li>•Providing educational programmes and trainings;</li> <li>•Improving productivity and innovations.</li> </ul>
Financing	<ul style="list-style-type: none"> <li>•Securing investments and financial assets;</li> <li>•Securing the means to complement public investments;</li> <li>•Obtaining start-up financing;</li> <li>•Improving results</li> </ul>

Source: UNWTO (2003)

Many tourism products are based on public assets such as the natural and cultural environments. A key role of the public sector is to provide basic infrastructure, essential services, destination management and marketing, innovation, training and education. Private enterprises provide the basic tourism products, facilities and essential services, such as accommodation, transport and

restaurants. This sector ranges from large global corporations, such as tour companies, airlines and hotel chains, to tiny, remote local family businesses, such as craft shops and lodges. The fragmented nature of tourism supply at destinations is another important reason for intensification of cooperation among the stakeholders, since it is critical to satisfy the needs of the visitors at every stage of their visit.

Increasing the number of PPPs does not necessarily mean that they will produce successful outcomes. A clear coordination mechanism with well-defined goals and targets should be in place. More generally, UNWTO (2000) provides some success factors in managing PPPs in the tourism sector as listed below, which are also summarized in Table 5.3.

- A balanced structure, with clear role assignment and responsibility for all members;
- A flexible approach by partners, along with the will to understand each partner's needs, contributing with the share of resources;
- Leadership sharing between both sectors, with shared and well-defined goals, realistic expectations and identification of the benefits on both sides;
- Awareness by all partners that the development of tourism must be sustainable, from an economic, but also social and environmental point of view;
- A long-term commitment that combines strategic vision and planning with specific short-term goals able to be measured;
- Periodic evaluation of the effectiveness of the role performed by each partner;
- Accurate and effective communication between partners and from partners towards all stakeholders.

When successfully implemented, PPPs play an important role in improving attractiveness of a destination, marketing efficiency, productivity as well as overall management of the tourism industry.

Moreover, tourism plays an important role in sustainable development and the integration of rural areas into the national and international economy. Overall, rural tourism is operated

Table 5.3: Success Factors in Managing PPPs



by households and mid-sized companies. These providers of tourism products and services do not have sufficient financial and human resources to succeed on their own, maintain market positions or secure an integrated quality management, as reported in UNDP (2011). The same report highlights some important areas where efforts are made in establishing PPPs for the development of rural tourism. These include:

- Strategic planning and territorial planning;
- Infrastructure investments and infrastructure projects;
- Creation of a competitive business environment to stimulate investments,
- Conservation and management of the cultural heritage of the area in question;
- Development of human capital through education and professional further education,
- Attracting new assets for investments, promotion and marketing;
- Promotion of sustainable tourism products and markets;
- Promotion of international good practice examples;
- Support to the process of information exchange/communication between destinations at the international level;
- Stimulating the technological development and introduction of new technologies in the production, promotion and commercialization of tourism products;
- Promotion and commercialization of tourism destinations;
- Securing a system and methodology for the collection and processing of statistical data necessary for market analyses and studies.

Another important dimension in enhancing cooperation among the stakeholders is partnership for pro-poor tourism. Pro-poor tourism is an approach to tourism development that ensures allocation of the economic benefits from tourism to local communities. A key aspect to this approach is the linkages between the private sector and local communities (WEF, 2009).

### 5.3 Benefits and Risks of PPPs in the Tourism Sector

Tourism investments do not only include hotel and entertainment constructions but also covers transportation projects (improvement and modernization of airports, railroads, seaports, etc.). In this context, tourism projects generally require a high amount of initial investment for which the budget constraints of governments and private entrepreneurs generally make big tourism investments difficult to be undertaken. Therefore, new financial models are needed to make tourism investments possible through some ways of cooperation of governments and private sector. In this regard, Public Private Partnership (PPP) could be suggested as a viable model to finance tourism projects where tourism projects are financed and operated through a partnership of government and private sector. As discussed above, PPPs are arrangements between government and private sector companies for the purpose of jointly investing in projects such as construction or improvement of accommodation and entertainment facilities, airports, seaports and railroads. Such partnerships are characterized by sharing investment amount, risk, responsibility and revenues between the partners. The reasons for establishing such partnerships generally involve financing, design, construction, operations and maintenance of tourism investments.



Based on the discussions above and the literature review, potential benefits and risks of PPPs in tourism sector can be listed as follows:

### Benefits

- **Cost Reduction:** Through consolidating the strengths of government and private sector, PPP models enable the government developing and implementing infrastructure projects as well as in operating and providing more efficient services;
- **Risk Sharing:** With PPPs, the government may share the risks with a private partner. The risks may include excess costs, failure to meet the time limit for delivering a service, difficulties in complying with environmental regulations and others, or the risk that earnings may not be sufficient to pay for the operational and capital costs;
- **Improving Service Levels or Maintaining Current Service Levels:** PPPs may introduce innovation in how delivery of the service is organized and performed.
- **Earnings Improvement:** PPPs may set user rates that reflect the true costs for a specific service. PPPs may also offer the opportunity to introduce innovative income origins, that would not otherwise be available through conventional service providing methods;
- **More Efficient Implementation:** Efficiency may be achieved through the combination of several activities and more flexible acquisitions and hiring, faster approval for more efficient capital funding and decision making.

### Risks

- **Loss of Government Control:** By their nature, PPPs imply the share of risks and decision-making between partners. PPPs that involve significant investment and risks by the private partner often mean greater partner involvement in decisions on how services are delivered, as well as on prices;
- **Greater Spending:** In establishing a price and fee policies for service users, not all governments consider the "true" service-providing costs. The service provided through PPPs demands price and tax policies that reflect the entire cost;
- **Political Risks and Labour Issues:** Many governments lack experience in PPPs and this lack of familiarity with PPPs by governments and interested parties may result in greater political risks. Collective agreements and labour laws applied to the PPP may cause an adverse response from unions or civil society;
- **Responsibility Issues:** With PPPs, the responsibility for service provision is less clear to the public than the traditional method. This may result in public criticism of the partnership and of the involved partner, or demand greater government involvement, to ensure conformity and response to public demands;
- **Insecure Services:** Private partners may suffer labour disputes, financial problems or other circumstances preventing them from honouring their commitments;
- **Lack of Competition:** Competition leads to innovation, efficiency and lower costs. Governments may not be able to benefit from PPPs if there is limited number of potential private partners with the know-how or ability to respond to a certain proposal;

- **Reduced Quality or Service Efficiency:** If not properly structured and managed, PPP contracts may result in reduced quality of the service, inefficiency or lack of suitable maintenance of an installation.

#### 5.4 Experience of Some OIC Countries with PPPs in the Tourism Sector

Like in many other developing countries, both public and private savings in the OIC countries are not sufficient enough to cover large-scale investments required to develop the tourism sector. Many OIC countries need to allocate the lion share of public investment funds to more critically important sectors such as health and education rather than tourism.

In this context, the PPP model can play a key role to join the forces of public and private actors in order to develop the tourism sector. However, as in any investment financing models, the PPP model has its own risks, if not planned properly and implemented in a planned manner. In the OIC group, there are successful member countries that benefited from the PPP model to a large extent in the development of the tourism sector. Some of them can be listed as follows:

- In Turkey and Tunisia, the PPP model worked very effectively while the public sector decided to disengage from the tourism sector progressively in favour of private sector. Also, the PPP model helped Turkey to have brand-new international airports in some major cities (e.g. Antalya and Izmir).
- In Indonesia, the PPP model was successfully implemented in *Nusa Dua* Tourism Area with the involvement of public and private authorities as well as support of local civil society organisations.
- Lebanon is another OIC country with a good number of successful PPP projects. For instance, Lebanon successfully completed the PPP projects at *Jeita grotto*, *Saida* and *Tyr* touristic attraction sides that helped to improve the contribution of the tourism sector to Lebanese economy.

To this end, the OIC countries, which are willing to explore the PPP model for the development the tourism sector, can benefit from the knowledge and experience acquired by some member countries through successfully realizing PPP projects.

In today's world, role of public sector is changing substantially. Governments withdraw from the production of goods and the provision of services and adopt a more strategic approach in its role in society. They are now increasingly focusing on fostering the trust that creates social capital and mobilizes forces and energy from all its stakeholders in society. In this fashion, PPPs in tourism industry can be formed to create new products or services, to achieve higher levels of efficiency, to open markets that were previously inaccessible, or to simple pool resources. The key factor leading to PPPs relies on the fact that all partners from the public and private sector wish to benefit from sharing resources and objectives.

## 5.5 Policy Recommendations

In the light of the above discussions, the following set of policy recommendations, which include recommendations both at the national and OIC cooperation levels, would lead to create a favourable environment conducive to the effective and efficient PPPs for the development of sustainable tourism sector in the OIC countries.

### At the National Level

- 1) Government and private sector are recommended to consider the following factors in managing successful and sustainable PPPs in the tourism sector:
  - a) A balanced structure, with clear role assignment and responsibility for all stakeholders;
  - b) Improving accountability and transparency and consistent enforcement of policies and laws;
  - c) Leadership is shared between both sectors, with shared and well-defined goals, realistic expectations and identification of the benefits on both sides;
  - d) A flexible approach by partners, along with the will to understand each partner's needs, contributing to the share of resources;
  - e) Awareness by all partners that the development of tourism must be sustainable not only from an economic but also from social and environmental point of view;
  - f) A long-term commitment that combines strategic vision and planning with specific short-term goals able to be measured;
  - g) Periodic evaluation of the effectiveness of the role performed by each partner;
  - h) Accurate and effective communication between partners and from partners towards all stakeholders; and stakeholders involvement and transparency in transactions.
- 2) Governments are recommended to develop strong and effective political and legal institutions with efficient regulatory environment and legal code that protect investors' rights.
- 3) Governments are recommended to involve in PPPs for tourism projects if such of the following circumstances exist for these projects:
  - a) The implementation of the project is difficult with the financial resources or expertise of the government alone;
  - b) Private investment would increase the quality or level of service or reduce the time to implement the projects compared to what the government could accomplish on its own;
  - c) There is an opportunity for competition, where possible, among prospective private investors, which may reduce the cost of the project;
  - d) Private investment provides an opportunity for innovation; and
  - e) There are no regulations or legislative restrictions on private investment in the delivery of the tourism services.

- 4) Governments are recommended to provide incentives to the corporate investors to encourage them to enter PPPs agreements with the government in tourism projects, and to support awareness rising and capacity building programmes for the private sector in the field of PPPs.
- 5) Governments are recommended to establish special PPP Units for developing policies, ensuring effective coordination, providing technical assistance and introducing/developing financial modalities for the effective implementation of the PPP projects.

#### At the OIC Cooperation Level

- 1) As the training and research arm of the OIC, Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRIC) can develop and introduce capacity building and training programmes in the OIC countries in the field of Tourism PPPs, and to facilitate the transfer and sharing of knowledge, experience and best practices among the member countries in this important area.
- 2) The OIC countries can develop joint PPP projects and benefit from the Islamic Development Bank Group's and other relevant OIC institutions' facilities for this purpose particularly related with the infrastructure development.
- 3) Joint programmes and promotional materials on tourism investment opportunities in the OIC countries, such as TV programmes, brochures, posters, and guidebooks can be developed and made available to the member countries as well as to other countries around the world in order to promote and encourage investment in the tourism sector in the OIC countries at the regional and international levels.
- 4) Scientific methods of joint tourism marketing and advertisement are recommended to be developed. A proposed example in this context could be developing an OIC Internet Guide for Tourism with a view to providing all actors in the tourism sector with comprehensive and updated information on tourism investment opportunities in the OIC countries, in particular the opportunities for PPPs in tourism sector. In so doing, the experience of the EU Internet Guide "EU Support for Tourism Enterprises and Tourist Destinations" could be a useful example.
- 5) The promotion of alliances between private tourism stakeholders in the OIC countries, particularly between the official tourism promotion bodies, needs to be encouraged with a view to strengthening tourism marketing and promoting cooperation at the sub-regional level as well as at the level of the OIC region as a whole.

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# Statistical Appendix

**Table A.1: International Tourist Arrivals by Region (Millions)**

Year	World	Africa	Americas	Asia & Pacific	Europe	Middle East
1965	112.9	1.4	23.2	2.1	83.7	2.4
1970	165.8	2.4	42.3	6.2	113	1.9
1975	222.3	4.7	50	10.2	153.9	3.5
1980	277.6	7.2	62.3	23	178	7.1
1981	278.2	8.1	62.5	24.9	175.1	7.6
1982	276.4	7.6	59.7	26	174.9	8.3
1983	281.2	8.2	59.9	26.6	179	7.5
1984	306.2	8.8	67.4	29.5	192.8	7.7
1985	319.5	9.6	65.1	32.9	203.8	8.1
1986	329.5	9.3	70.9	36.8	205.5	6.9
1987	359	9.8	76.6	42.1	223.3	7.2
1988	384.1	12.6	83	48.7	230.7	9.1
1989	409	13.8	86.9	49.4	249.6	9.2
1990	438.4	15.2	92.8	56.2	264.7	9.6
1991	441.3	16.3	95.3	58	262.8	8.9
1992	478.4	18.2	102.2	65.8	280.9	11.3
1993	494.2	18.8	102.2	72.3	289.5	11.4
1994	518	19.1	105.1	80.1	301.5	12.1
1995	538.5	20.1	109	82.5	313.2	13.7
1996	572.4	21.8	114.5	90.4	329.9	15.8
1997	596	22.8	116.2	89.7	350.6	16.7
1998	614.3	25.2	119.2	89.4	362.5	18
1999	637.4	26.7	122	98.8	368.4	21.5
2000	674	26.2	128.2	110.3	386.4	22.4
2001	680	28.9	122.1	120.7	383.8	25
2002	700	29.5	116.6	131.1	394	29.2
2003	694	31	113.1	113.3	407.1	29.5
2004	764	33.8	125.7	144.2	424.4	36.3
2005	809	34.8	133.3	154	453	33.7
2006	846	39.1	135.8	166	463.9	40.9
2007	900	42.6	142.9	182	485.4	46.9
2008	919	44.5	146.9	184	487.3	56
2009	880	45.9	140	180.9	460	52.9
2010	949	49.5	150.1	205.4	488.9	54.7
2011	997	49.5	155.5	218.7	520.1	52.8
2012	1038	51.9	162.5	233.8	540.2	49.8
2013	1087	54.4	167.5	249.8	566.4	48.4
2014	1133	55.8	180.9	263.3	581.7	51.1

Source: UNDATA Online Database



**Table A.2:** International Tourism Receipts by Region (Billion US\$)

Year	World	Africa	Americas	Asia & Pacific	Europe	Middle East
1965	11.6	0.3	3.4	0.5	7.2	0.3
1970	17.9	0.5	4.8	1.2	11	0.4
1975	40.7	1.3	10.2	2.5	25.9	0.9
1980	104.5	3.4	24.7	10.3	62.7	3.5
1981	106	3.7	27.8	12.1	58.1	4.4
1982	99.9	3.4	25.7	12.2	56.4	2.2
1983	103	3.5	26.3	12.8	56	4.4
1984	111.7	3.2	32	13.7	58.1	4.7
1985	118.5	3.1	33.3	14.5	63.4	4.2
1986	144.4	3.6	38.4	18.8	80.1	3.5
1987	178.1	4.6	43.1	24.8	101.1	4.5
1988	205.9	5.5	51.3	32.4	112.3	174.2
1989	262.9	5.7	60.2	36.1	155.8	5.2
1990	264.1	6.4	69.2	41.1	143.1	4.3
1991	277.7	6	76.3	42.9	148.1	4.5
1992	320.7	6.8	3.7	51	172.7	6.6
1993	327.3	6.9	89.41	57	167.3	6.9
1994	356.4	7.6	92.4	67.3	181.1	8.1
1995	405	8.5	98.4	75.9	212.3	9.8
1996	438.6	9.7	108.2	84.8	224.8	11
1997	442	9.5	114.4	82.2	223.7	12.1
1998	444.2	10.2	115.2	72.1	234.8	11.9
1999	457.4	10.8	119.9	79	233.9	13.9
2000	477	10.4	130.8	85.2	232.7	15.2
2001	464	11.5	119.8	88	227.7	15.6
2002	480	11.9	113.4	96.3	242.5	16.2
2003	524	16	114.1	93.5	284.1	19.7
2004	633	18.9	132	123.9	329.3	25.2
2005	676	21.6	144.5	134.5	349.2	26.3
2006	742	24.6	153.7	156	376.3	30.6
2007	858	29.1	171.3	186.8	435.2	35
2008	942	29.9	187.7	209	472.8	42.8
2009	852	28.1	165.6	202.8	412.4	43.3
2010	930	31.6	182.2	248.7	406.2	50.3
2011	1042	32.7	197.9	298.6	466.7	46.4
2012	1075	34	213	324	458	47
2013	1197	35.1	264.4	360.7	491.7	45.1
2014	1245	36.2	274	376.9	508.8	49.2

Source: United Nations World Tourism Organisation, Tourism Market Trends, 2006 Edition;  
United Nations World Tourism Organisation Tourism Highlights, Various Issues

Table A.3: International Tourist Arrivals in OIC Countries (Thousands)

	2009	2010	2011	2012	2013
<b>Afghanistan</b>					
Albania	1856	2417	2932	3514	3256
Algeria	1912	2070	2395	2634	
Azerbaijan	1830	1963	2239	2484	2509
Bahrain	8861	11952	6732	8062	9163
Bangladesh	267	303	155	125	148
Benin	190	199	209	220	231
Brunei					3279
Burkina Faso	269	274	238	237	218
Cameroon					
Chad	31	14	25	30	32
Comoros	11	15	19		
Cote d'Ivoire	231	252	270	289	
Djibouti	58	51	56	60	63
Egypt	11914	14051	9497	11196	9174
Gabon					
Gambia	142	91	106	157	171
Guinea		12	131	96	56
Guinea-Bissau					
Guyana	141	152	157	177	
Indonesia	6324	7003	7650	8044	8802
Iran	2116	2938	3354	3834	4769
Iraq	1262	1518	1510	1111	892
Jordan	3789	4207	3960	4162	3945
Kazakhstan	2944	3196	4434	4807	4926
Kuwait	5088	5208	5574	5729	6217
Kyrgyzstan	1394	855	2278	2406	3076
Lebanon	1844	2168	1655	1366	1274
Libya					
Malaysia	23646	24577	24714	25033	25715
Maldives	656	792	931	958	1125
Mali	160	169	160	134	142
Mauritania					
Morocco	8341	9288	9342	9375	10046
Mozambique	1461	1718	1902	2113	1886
Niger	66	74	82	94	123
Nigeria	6053	6113	3765	4673	4038
Oman	1814	1631	1678	1801	2047
Pakistan	855	907	1161	966	
Palestine	396	522	449	490	545
Qatar	1482	1700	2057	2346	2611
Saudi Arabia	10897	10850	17498	14276	13380
Senegal	810	900	968	962	1063
Sierra Leone	37	39	52	60	81
Somalia					
Sudan	420	495	536	575	591
Suriname	151	205	220	240	249
Syria	6092	8546	5070		
Tajikistan	207	160	183	244	208
Togo	150	202	300	235	327
Tunisia	6901	6903	4785	5950	6269
Turkey	30187	31364	34654	35698	37795
Turkmenistan					
Uganda	807	946	1151	1197	1206
United Arab Emirates					
Uzbekistan	1215	975			1969
Yemen	1028	1025	829	874	990
<b>OIC Total</b>	<b>156306</b>	<b>171010</b>	<b>168063</b>	<b>169034</b>	<b>174607</b>

Source: UNDATA Online Database, UNWTO Compendium of Tourism Statistics CD-ROM 2015

**Table A.4: International Tourism Receipts in OIC Countries (Million US\$)**

	2009	2010	2011	2012	2013
<b>Afghanistan</b>	96	138	137	116	89
<b>Albania</b>	2014	1780	1833	1623	1670
<b>Algeria</b>	361	324	300	295	326
<b>Azerbaijan</b>	545	792	1500	2634	2618
<b>Bahrain</b>	1873	2163	1766	1742	1865
<b>Bangladesh</b>	95	104	103	107	130
<b>Benin</b>	131.4	149.4	201	174	
<b>Brunei</b>	254			92	
<b>Burkina Faso</b>	99	105			
<b>Cameroon</b>	271	171	423	377	607
<b>Chad</b>					
<b>Comoros</b>	32.25	35.2	42.2	39.3	
<b>Cote d'Ivoire</b>	164	213			
<b>Djibouti</b>	16	18	19.2	20.5	21.6
<b>Egypt</b>	11757	13633	9333	10823	7253
<b>Gabon</b>					
<b>Gambia</b>	64	80	92	99	
<b>Guinea</b>	4.9	2.04	2.12	1.71	
<b>Guinea-Bissau</b>	12	13.6	14.5	6.9	
<b>Guyana</b>	35	80	95	64	77
<b>Indonesia</b>	6053	7618	9038	9463	10302
<b>Iran</b>	2259	2631	2574	1346	
<b>Iraq</b>	1432	1736	1557	1640	
<b>Jordan</b>	3472	4390	4351	5123	5145
<b>Kazakhstan</b>	1185	1236	1524	1572	1717
<b>Kuwait</b>	660	574	644	780	601
<b>Kyrgyzstan</b>	300	212	405	486	585
<b>Lebanon</b>	7157	8026	6797	6825	6373
<b>Libya</b>	159	170	30	110	131
<b>Malaysia</b>	17231	18152	19649	20251	21026
<b>Maldives</b>	1473	1713	1946	1955	2338
<b>Mali</b>	196	208	218		
<b>Mauritania</b>					
<b>Morocco</b>	7980	8176	9101	8491	8201
<b>Mozambique</b>	224	266	289	273	
<b>Niger</b>	69	105.5	54	51	
<b>Nigeria</b>	791	738	688	641	
<b>Oman</b>	1092	1256	1571	1781	1913
<b>Pakistan</b>	950	998	1123	1016	929
<b>Palestine</b>	410	667	795	755	399
<b>Qatar</b>			4463	7220	8452
<b>Saudi Arabia</b>	6744	7536	9317	8400	8690
<b>Senegal</b>	474	464	524		
<b>Sierra Leone</b>	25	26	44	47	66
<b>Somalia</b>					
<b>Sudan</b>	299	94	185	772	773
<b>Suriname</b>	70	69	69	79	92
<b>Syria</b>	3781	6308	1816		
<b>Tajikistan</b>	19.5	32.4	39.8	60.4	56.9
<b>Togo</b>	73	105			
<b>Tunisia</b>	3524	3477	2529	2931	2863
<b>Turkey</b>	26331	26318	30093	31455	34863
<b>Turkmenistan</b>					
<b>Uganda</b>	683	802	977	1157	1204
<b>United Arab Emirates</b>	7352	8577	9204	10380	11564
<b>Uzbekistan</b>	99	121			
<b>Yemen</b>	899	1291	910	1005	1097
<b>OIC Total</b>	<b>121291</b>	<b>133894</b>	<b>138386</b>	<b>144280</b>	<b>144038</b>

Source: UNDATA Online Database, UNWTO Compendium of Tourism Statistics CD-ROM 2015

**Table A.5: International Tourism Expenditures in OIC Countries (Million US\$)**

	2009	2010	2011	2012	2013
Afghanistan	61	86	127	80	100
Albania	1693	1454	1678	1374	1567
Algeria	575	677	571	565	482
Azerbaijan	488	856	1778	2617	3032
Bahrain	597	684	899	889	873
Bangladesh	661	852	838	900	1297
Benin	88	91	81	96	
Brunei	477			591	
Burkina Faso	111	110			
Cameroon	476	265	622	668	795
Chad					
Comoros	30	33	37	37	
Cote d'Ivoire	589	569			
Djibouti	17.5	20.5	33.5	29.6	30.9
Egypt	2941	2696	2575	3037	3466
Gabon					
Gambia	9	11	11	8	
Guinea	28	17	49	41	61
Guinea-Bissau	26	29.5	38.6	24.5	
Guyana	52	73	79	82	81
Indonesia	6908	8432	8653	9055	10280
Iran	8503	10570	10881	7517	
Iraq	1221	1675	1879	2363	
Jordan	1202	1736	1280	1257	1192
Kazakhstan	1319	1489	1831	2022	2033
Kuwait	6799	7106	8879	10073	12468
Kyrgyzstan	273	275	392	529	505
Lebanon	4928	4868	4440	4517	4617
Libya	1683	2184	2269	2654	2598
Malaysia	7196	8324	10180	11545	11950
Maldives	212	252	233	207	246
Mali	191	167	171		
Mauritania				101	105
Morocco	1713	1879	2260	2095	2002
Mozambique	247	260	256	248	310
Niger	84	95	57	132	
Nigeria	6236	8379	9534	9280	
Oman	1295	1768	1982	2184	2390
Pakistan	1098	1370	1851	1852	1618
Palestine	564	583	666	704	617
Qatar			7813	10702	11729
Saudi Arabia	21312	22076	18202	17986	18648
Senegal	258	217	250		
Sierra Leone	26	22	26	25	20
Somalia					
Sudan	868	1116	937	699	460
Suriname	35	41	49	58	75
Syria	980	1598	850		
Tajikistan	5.8	24.9	13.8	13.3	14.1
Togo	94	89			
Tunisia	478	611	678	673	768
Turkey	5061	5817	5372	4605	5268
Turkmenistan					
Uganda	351	464	540	642	592
United Arab Emirates	10347	11818	13206	15072	17699
Uzbekistan					
Yemen	277	252	258	148	161
<b>OIC Total</b>	<b>100684</b>	<b>114082</b>	<b>125306</b>	<b>129997</b>	<b>120150</b>

Source: UNDATA Online Database, UNWTO Compendium of Tourism Statistics CD-ROM 2015

**Table A.6: Balance of International Tourism (Million US\$)**

	2009	2010	2011	2012	2013
Afghanistan	35	52	10	36	-11
Albania	321	326	155	249	103
Algeria	-214	-353	-271	-270	-156
Azerbaijan	57	-64	-278	17	-414
Bahrain	1276	1479	867	853	992
Bangladesh	-566	-748	-735	-793	-1167
Benin	43.4	58.4	120	78	
Brunei	-223			-499	
Burkina Faso	-12	-5			
Cameroon	-205	-94	-199	-291	-188
Chad					
Comoros	2.25	2.2	5.2	2.3	
Cote d'Ivoire	-425	-356			
Djibouti	-1.5	-2.5	-14.3	-9.1	-9.3
Egypt	8816	10937	6758	7786	3787
Gabon					
Gambia	55	69	81	91	
Guinea	-23.1	-14.96	-46.88	-39.29	-61
Guinea-Bissau	-14	-15.9	-24.1	-17.6	
Guyana	-17	7	16	-18	-4
Indonesia	-855	-814	385	408	22
Iran	-6244	-7939	-8307	-6171	
Iraq	211	61	-322	-723	
Jordan	2270	2654	3071	3866	3953
Kazakhstan	-134	-253	-307	-450	-316
Kuwait	-6139	-6532	-8235	-9293	-11867
Kyrgyzstan	27	-63	13	-43	80
Lebanon	2229	3158	2357	2308	1756
Libya	-1524	-2014	-2239	-2544	-2467
Malaysia	10035	9828	9469	8706	9076
Maldives	1261	1461	1713	1748	2092
Mali	5	41	47		
Mauritania				-101	-105
Morocco	6267	6297	6841	6396	6199
Mozambique	-23	6	33	25	-310
Niger	-15	10.5	-3	-81	
Nigeria	-5445	-7641	-8846	-8639	
Oman	-203	-512	-411	-403	-477
Pakistan	-148	-372	-728	-836	-689
Palestine	-154	84	129	51	-218
Qatar			-3350	-3482	-3277
Saudi Arabia	-14568	-14540	-8885	-9586	-9958
Senegal	216	247	274		
Sierra Leone	-1	4	18	22	46
Somalia					
Sudan	-569	-1022	-752	73	313
Suriname	35	28	20	21	17
Syria	2801	4710	966		
Tajikistan	13.7	7.5	26	47.1	42.8
Togo	-21	16			
Tunisia	3046	2866	1851	2258	2095
Turkey	21270	20501	24721	26850	29595
Turkmenistan					
Uganda	332	338	437	515	612
United Arab Emirates	-2995	-3241	-4002	-4692	-6135
Uzbekistan	99	121			
Yemen	622	1039	652	857	936
<b>OIC Total</b>	<b>20607</b>	<b>19812</b>	<b>13080</b>	<b>14282</b>	<b>23888</b>

Source: Calculated based on data in Table A.4 and Table A.5 and UNDATA Online Database

Table A.7: Balance of International Tourism (as % of GDP)

	2009	2010	2011	2012	2013	Average 2009-2013
Afghanistan	0.28	0.32	0.05	0.17	-0.05	0.15
Albania	2.67	2.73	1.20	2.02	0.80	1.88
Algeria	-0.16	-0.22	-0.14	-0.13	-0.07	-0.14
Azerbaijan	0.13	-0.12	-0.42	0.02	-0.56	-0.19
Bahrain	5.56	5.75	2.99	2.77	3.02	4.02
Bangladesh	-0.55	-0.65	-0.59	-0.62	-0.76	-0.64
Benin	0.66	0.89	1.65	1.03		0.85
Brunei	-2.08			-2.94		-1.00
Burkina Faso	-0.14	-0.06				-0.04
Cameroon	-0.88	-0.40	-0.75	-1.10	-0.64	-0.75
Chad						
Comoros	0.43	0.41	0.88	0.40		0.42
Cote d'Ivoire	-1.84	-1.55				-0.68
Djibouti	-0.14	-0.22	-1.15	-0.67	-0.64	-0.57
Egypt	4.69	5.10	2.92	2.99	1.48	3.44
Gabon						
Gambia	6.11	7.25	8.96	9.96		6.45
Guinea	-0.44	-0.29	-0.84	-0.63	-0.85	-0.61
Guinea-Bissau	-1.69	-1.88	-2.47	-1.94		-1.60
Guyana	-0.84	0.31	0.62	-0.63	-0.13	-0.13
Indonesia	-0.16	-0.11	0.05	0.05		-0.04
Iran	-1.71	-1.88	-1.44	-1.11		-1.23
Iraq	0.19	0.05	-0.20	-0.39		-0.07
Jordan	9.53	10.04	10.65	12.50	11.77	10.90
Kazakhstan	-0.12	-0.17	-0.16	-0.22	-0.14	-0.16
Kuwait	-5.79	-5.66	-5.35	-5.34	-6.75	-5.78
Kyrgyzstan	0.58	-1.31	0.21	-0.65	1.11	-0.01
Lebanon	6.28	8.22	5.88	5.23	3.72	5.87
Libya	-2.21	-2.49	-5.52	-2.66	-3.31	-3.24
Malaysia	4.96	3.97	3.28	2.86	2.90	3.59
Maldives	58.13	62.57	71.99	67.08	73.76	66.71
Mali	0.06	0.44	0.44			0.19
Mauritania				-2.08	-1.90	-0.80
Morocco	6.89	6.94	6.90	6.67	5.97	6.67
Mozambique	-0.21	0.06	0.25	0.17	-1.98	-0.34
Niger	-0.28	0.18	-0.05	-1.21		-0.27
Nigeria	-2.00	-2.07	-2.15	-1.87		-1.62
Oman	-0.42	-0.87	-0.59	-0.52	-0.60	-0.60
Pakistan	-0.09	-0.21	-0.34	-0.39	-0.31	-0.27
Palestine						
Qatar	0.00	0.00	-1.97	-1.83	-1.62	-1.08
Saudi Arabia	-3.40	-2.76	-1.33	-1.31	-1.33	-2.02
Senegal	1.69	1.91	1.91			1.10
Sierra Leone	-0.04	0.16	0.61	0.58	0.93	0.45
Somalia						
Sudan	-1.18	-1.89	-1.36	0.14	0.57	-0.74
Suriname	0.90	0.64	0.45	0.42	0.32	0.55
Syria	5.18	7.79	1.80			2.95
Tajikistan	0.28	0.13	0.40	0.62	0.50	0.39
Togo	-0.66	0.50				-0.03
Tunisia	7.01	6.51	4.03	5.00	4.47	5.40
Turkey	3.46	2.80	3.19	3.40	3.60	3.29
Turkmenistan						
Uganda	1.65	1.56	1.86	2.02	2.31	1.88
United Arab Emirates	-1.18	-1.13	-1.15	-1.26	-1.52	-1.25
Uzbekistan	0.29	0.31				0.12
Yemen	2.19	3.36	2.10	2.67	2.70	2.60
<b>OIC Total</b>	<b>0.46</b>	<b>0.37</b>	<b>0.21</b>	<b>0.22</b>	<b>0.35</b>	<b>0.26</b>

Source: Calculated based on data in Table A.6 and GDP figures from World Bank WDI Database

Table A.8: International Tourism Receipts (as % of Merchandise Exports)

	2009	2010	2011	2012	2013	Average 2009-2013
Afghanistan	21.53	27.51	27.99	23.88	14.61	23.11
Albania	183.02	114.52	93.93	82.43	72.53	109.29
Algeria	0.80	0.57	0.41	0.41	0.49	0.54
Azerbaijan	3.71	3.71	5.65	11.02	10.92	7.00
Bahrain	8.21	7.31	5.25	4.86	5.14	6.15
Bangladesh	0.66	0.63	0.45	0.48	0.50	0.54
Benin	31.74	21.20	22.67	18.29		23.47
Brunei	3.93			0.77		2.35
Burkina Faso	21.92	17.05				19.48
Cameroon	6.96	3.74	7.87	6.86	10.97	7.28
Chad						
Comoros	115.92	112.39	79.41	38.18		86.48
Cote d'Ivoire	1.59	2.07				1.83
Djibouti	4.20	3.87	3.59	3.92	4.02	3.92
Egypt	48.81	50.02	29.60	37.01	25.10	38.11
Gabon						
Gambia	115.21	127.21	69.63	73.52		96.39
Guinea	0.38	0.09	0.10	0.09		0.17
Guinea-Bissau	7.66	7.41	4.19	3.57		5.71
Guyana	3.64	7.18	6.78	4.02	5.65	5.45
Indonesia	5.20	4.83	4.44	4.98	5.64	5.02
Iran	3.04	2.66	1.98	1.32		2.25
Iraq	3.94	3.68	2.16	1.93		2.93
Jordan	68.88	73.91	64.63	63.37	65.05	67.17
Kazakhstan	2.74	2.17	1.89	1.84	2.73	2.27
Kuwait	1.38	0.92	0.73	0.74	0.60	0.88
Kyrgyzstan	33.17	16.83	34.62	40.97	49.99	35.12
Lebanon	208.36	207.97	161.79	152.24	171.94	180.46
Libya	0.45	0.38	0.17	0.20	0.33	0.31
Malaysia	10.95	9.13	8.61	8.89	9.21	9.36
Maldives	1293.92	1264.86	995.55	951.01	1012.91	1103.65
Mali	123.46	69.93	47.31			80.23
Mauritania						
Morocco	59.28	49.24	43.78	43.53	37.70	46.70
Mozambique	10.43	11.86	8.03	6.66		9.25
Niger	12.94	23.70	6.01	5.44		12.02
Nigeria	1.50	0.95	0.65	0.60		0.92
Oman	3.95	3.43	3.34	3.42	3.39	3.50
Pakistan	5.42	4.67	4.36	3.97	3.50	4.38
Palestine						
Qatar			3.90	5.43	6.18	5.17
Saudi Arabia	3.91	3.26	2.82	2.29	2.48	2.95
Senegal	25.13	23.81	22.09			23.67
Sierra Leone	11.65	8.90	12.28	5.21	3.96	8.40
Somalia						
Sudan	3.62	0.82	1.91	22.94	16.14	9.09
Suriname	14.30	9.35	9.42	11.12	14.15	11.67
Syria	30.12	39.33	10.81			26.75
Tajikistan	1.93	2.71	3.95	5.47	5.83	3.98
Togo	11.01	16.10				13.55
Tunisia	25.23	21.94	14.74	17.98	17.53	19.48
Turkey	25.78	23.11	22.31	20.63	22.97	22.96
Turkmenistan						
Uganda	55.67	57.19	58.84	68.15	65.62	61.09
United Arab Emirates	6.02	4.85	3.81	3.99	4.31	4.60
Uzbekistan	2.06	2.13				2.10
Yemen	18.39	16.54	9.40	11.43	11.24	13.40
OIC Average	9.42	7.92	6.36	6.31	6.50	7.30

Source: Calculated based on data in Table A.4 and the Export figures in the IMF DOTS Database.

Table A.9: Intra-OIC Tourist Arrivals (Thousands)

	2009	2010	2011	2012	2013
Afghanistan					
Albania	33	38	39	46	56
Algeria	273	327	592	631	
Azerbaijan	548	611	709	643	574
Bahrain			4,702	5,806	6,917
Bangladesh					
Benin	74	91	84	115	115
Brunei					2,868
Burkina Faso	91	96	88	89	84
Cameroon					
Chad					
Comoros					
Cote d'Ivoire					
Djibouti					
Egypt	2,109	2,355	2,017	2,488	1,968
Gabon					
Gambia					
Guinea			40	37	19
Guinea-Bissau					
Guyana					
Indonesia	1,164	1,336	1,361	1,414	1,569
Iran	1,582	2,214	2,478	3,050	4,189
Iraq	1,200	1,448	1,479	1,055	851
Jordan	2,004	2,184	2,027	2,136	1,955
Kazakhstan	2,352	2,581	3,829	4,156	4,336
Kuwait	3,548	3,620	3,924	4,079	4,449
Kyrgyzstan					
Lebanon	992	1,232	804	565	494
Libya					
Malaysia	3,995	4,085	3,991	4,309	4,470
Maldives	22	28	36	46	68
Mali					
Mauritania					
Morocco	365	406	447	523	594
Mozambique					
Niger					
Nigeria	4,099	4,103	676	850	1,125
Oman					
Pakistan	177	203	191	134	
Palestine					
Qatar	556	644	846	953	1,090
Saudi Arabia	10,126	9,988	14,715	12,230	11,046
Senegal					
Sierra Leone		7	10	16	14
Somalia					
Sudan					
Suriname	19	31	34	44	43
Syria	6,020	8,697	5,132		
Tajikistan	174	127	151	186	181
Togo	36	44	57	45	55
Tunisia	3,054	2,985	2,501	2,897	3,292
Turkey	3,847	4,864	5,342	5,067	6,137
Turkmenistan					
Uganda	18	27	43	7	7
United Arab Emirates					
Uzbekistan					1,748
Yemen	311	403	319	370	393
<b>OIC Total</b>	<b>48,787</b>	<b>54,774</b>	<b>58,666</b>	<b>53,986</b>	<b>60,707</b>

Source: UNDATA Online Database, UNWTO Compendium of Tourism Statistics CD-ROM 2015



Table A.10: Intra-OIC Tourism Receipts (Million US\$)

	2009	2010	2011	2012	2013
<b>Afghanistan</b>					
Albania	35	28	25	21	29
Algeria	52	51	74	71	
Azerbaijan	163	247	475	682	599
Bahrain			1,234	1,255	1,408
<b>Bangladesh</b>					
Benin	51	68	81	91	
Brunei					
Burkina Faso	34	37			
Cameroon					
Chad					
Comoros					
Cote d'Ivoire					
Djibouti					
Egypt	2,081	2,285	1,983	2,405	1,556
Gabon					
Gambia					
Guinea			1	1	
Guinea-Bissau					
Guyana					
Indonesia	1,114	1,454	1,608	1,663	1,837
Iran	1,689	1,983	1,901	1,071	
Iraq	1,361	1,656	1,525	1,558	
Jordan	1,836	2,279	2,228	2,629	2,550
Kazakhstan	947	998	1,316	1,359	1,511
Kuwait	460	399	453	555	430
<b>Kyrgyzstan</b>					
Lebanon	3,849	4,562	3,300	2,823	2,473
Libya					
Malaysia	2,911	3,017	3,173	3,486	3,655
Maldives	49	60	75	95	141
Mali					
<b>Mauritania</b>					
Morocco	349	358	436	474	485
Mozambique					
Niger					
Nigeria	536	495	123	117	
Oman					
Pakistan	196	223	185	141	
Palestine					
Qatar			1,835	2,933	3,529
Saudi Arabia	6,267	6,937	7,835	7,196	7,174
Senegal					
Sierra Leone		5	8	12	11
<b>Somalia</b>					
Sudan					
Suriname	9	10	11	15	16
Syria	3,736	6,419	1,838		
Tajikistan	16	26	33	46	50
Togo	18	23			
Tunisia	1,559	1,503	1,322	1,427	1,503
Turkey	3,356	4,082	4,639	4,465	5,661
<b>Turkmenistan</b>					
Uganda	16	23	37	7	7
<b>United Arab Emirates</b>					
Uzbekistan					
Yemen	272	508	350	425	436
<b>OIC Total</b>	<b>37,858</b>	<b>42,886</b>	<b>43,306</b>	<b>46,080</b>	<b>50,078</b>

Source: Calculated based on data in Table A.3, Table A.4 and Table A.9