INTERNATIONAL TOURISM IN OIC MEMBER COUNTRIES

Prospects and Challenges

STATISTICAL, ECONOMIC AND SOCIAL RESEARCH AND TRAINING CENTRE FOR ISLAMIC COUNTRIES (SESRIC)

ORGANIZATION OF ISLAMIC COOPERATION (OIC)

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Introduction

2 International Tourism Worldwide: Overview

3 The Impacts of Social Movements on Tourism

4 Conclusion and Policy Recommendations

Table A.1 International Tourist Arrivals in Europe (Million)

COUNTRY PROFILES

GENERAL INFORMATION

Gambia

Population (million) 2012: 1.79
Population Growth (%) 2012: 3.19
Urban Population (% of total population) 2012: 57.8
Labor Force (% of total population) 2011: 41.9
Unemployment Rate (% of labor force) 2010: 3.6
GDP per capita (PPP, cur. $) 2012: 1,664
Average Years of Schooling 2010: 3.6
Life Expectancy at Birth (years) 2011: 58.5

International Tourist Arrivals

2007 2008 2009 2010 2011
Total Arrivals (thousands) 143 147 142 91 106
Share in OIC (%) 0.11 0.10 0.10 0.06 0.07
Share in World (%) 0.02 0.02 0.02 0.01 0.01

Figure 3.1 Tourism is a major source of revenue for the OIC countries.

3.1 Tourism is a major source of revenue for the OIC countries. It is for this reason that tourism is a significant sector of the OIC countries. The table above shows the total revenue from tourism for the OIC countries in 2012.
Highlights on International Tourism Worldwide
Importance of International Tourism

- A remarkable socio-economic phenomena of the past century.

- One of the world’s largest industries and categories of international trade.

- All the activities that are directly/indirectly involved in providing goods and services to tourists (According to SICTA: 185 supply-side activities).

- Transportation and communication, hotels and lodging, food and beverages, cultural and entertainment, banking and finance, promotion and publicity services, etc.
Global Tourism Trends: Arrivals and Receipts

- Over the last decade, international tourism is growing at substantial and sustainable rates.

- From 2007-2013, arrivals are up from 900 to 1087 millions. Similarly, receipts are up from $858 billion to $1159 billion.

- During the period under consideration, tourist arrivals increased at an annual average growth of 3.2 per cent whereas annual average growth rate of tourism receipts is around 5.1 per cent.
Global Tourism Trends: Regional Performance | 2000 vs. 2013 |

Figure 2.2: International Tourism by Region (% of World Total)

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist Arrivals</td>
<td>57.1</td>
<td>52.1</td>
</tr>
<tr>
<td>Americas</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Asia/Pacific</td>
<td>16.8</td>
<td>23</td>
</tr>
<tr>
<td>Europe</td>
<td>18.6</td>
<td>16.4</td>
</tr>
<tr>
<td>Middle East</td>
<td>3.5</td>
<td>3.1</td>
</tr>
<tr>
<td>Tourism Receipts</td>
<td>49.1</td>
<td>42.2</td>
</tr>
<tr>
<td>Americas</td>
<td>2.6</td>
<td>4</td>
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<td>19.8</td>
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<tr>
<td>Middle East</td>
<td>2.1</td>
<td>3</td>
</tr>
</tbody>
</table>

Source: Table A.1 and A.2 in the Statistical Appendix
After 2009, tourism receipts has been continuously on the rise in Africa, Americas and Asia & Pacific.

The average rate of growth of tourism receipts between 2006 and 2012 is as follows:

- Africa: 7.0%
- Americas: 6.0%
- Asia & Pacific: 13.7%
- Europe: 4.4%
- Middle East: 9.1%
The average tourism receipts per arrival is above the world average of $1066 in Asia&Pacific and Americas, whereas, in Middle East, Europe and Africa, it is below the world average.
Highlights on International Tourism in OIC Countries
The number of international tourist arrivals in the OIC countries increased from 155.5 million in 2008 to 157.3 million in 2012 corresponding to a 15.2% share in the world. The annual average growth rate is 0.23% between 2008-2012 (impact of recession). However, for the 2000 -2011 period it is 7.2%.

In 2008, these tourists generated $124.1 billion as international tourism receipts in the OIC countries, corresponding to a 14.2% share in the world’s total tourism receipts. In 2012, international tourism receipts amounted to $132.3 billion corresponding to a 12.9% share in world’s total tourism receipts. The annual average growth rate is 1.29%. However, for the 2000 -2011 period it is 10.6%.
Top 10 OIC Tourism Destinations

- Top-10 countries hosted 124.7 million international tourist, corresponding to a share of 79.2% of the OIC total in 2012.

Top 10 OIC Tourism Earners

- Top-10 countries earned $110.6 billion as international tourism receipts in 2012, corresponding to a share of 83.5% of the OIC total.
- The OIC average tourism receipts per arrival in 2012 amounted to $841.

- The highest receipts per tourist arrival were recorded in Lebanon (4611) followed by Qatar (2934) and Maldives (1981).
The Economic Role of International Tourism in OIC Countries
Balance of international tourism is calculated by deducting the international tourism expenditure from the international tourism receipts.

Notably, majority of the countries with highest tourism balance are the main OIC international tourism destinations and earners. Turkey has a surplus of $27.6 billion followed by Malaysia with a surplus of $8.7 billion.
Economic Role of Tourism in OIC Countries

Balance of International Tourism as % of GDP (Average 2008-2012)  International Tourism Receipts as % of Exports (Average 2008-2012)

Source: WDI.
Intra-OIC Tourism
Intra-OIC Tourism Trends: Arrivals and Receipts

- Intra-OIC tourist arrivals decreased from 46.9 million in 2008 to 46.3 million in 2012.
- In 2012, intra-OIC tourist arrivals accounted for 30.7% of the total tourists arrivals in OIC.

- Intra-OIC tourism receipts are up from US$ 29.9 billion in 2008 to US$ 30.5 billion in 2012.
- As of 2012, Intra-OIC tourism receipts accounted for almost 24.6% of the total international tourism receipts in the OIC.
Top-10 countries hosted 41.3 million tourists from the OIC member countries, corresponding to 90.2% of the total intra-OIC tourist arrivals in 2012.

Top-10 countries earned US$ 27.9 billion from intra-OIC tourists corresponding to 91.4% of the total intra-OIC receipts.
The challenges are diverse as each country has its own tourism features, level of development and national development priorities and policies.

- Technical know-how and weak promotional activity
- Tourism-related infrastructures
- Tourism investments
- Consistent tourism strategies and policies
- Tourism diversification
- Tourism safety
Conclusions

High potential for the development of a sustainable international tourism sector

Rich and diverse natural, geographical, historical, and cultural heritage assets

A large number of citizens travel around the world for business, leisure, and other purposes

International tourism is a very important sector that, if properly planned and managed, could play a significant role in the economic development of the OIC countries.

Adoption of articulate long-term strategies and medium to short-term coherent plans and programmes at the national level

Creating a supportive OIC cooperation environment at the regional level
Policy Recommendations (I)

At the National Level

- Sustainable tourism development strategies and plans
- Physical planning of tourism destinations
- The quality and efficiency of the basic tourism-related infrastructures and services
- Synergies between transport and tourism policies
- Private sector involvement in tourism development plans and projects
- Diversification of tourism products and services
- Tourism-oriented education and training programmes
At the OIC Cooperation Level

- OIC Internet Guide for Tourism
- OIC Tourism Alliances, Airline Companies
- Agreement on Tourism Visa Arrangements
- Promote and Encourage public-private joint investment in Tourism
THANK YOU

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