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STRATEGY FOR THE DEVELOPMENT OF TOURISM IN THE ECWA REGION

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CONTENTS

CONTENTS (Cont'd)

CONTENTS (Cont'd)

LIST OF TEXT TABLES, MAPS AND CHART

LIST OF TEXT TABLES, MAPS AND CHART (Cont'd)

LIST OF APPENDIX TABLES

(TOURISM STATISTICS BY COUNTRY)

Table No.			Page

Table No.			Page
XI.	SYRIA:	. . . .	202
	Table XI-1.	Arrivals of foreign visitors at frontiers, (by country group) (1979-1981)	203
	Table XXI-2.	Arrivals of foreign visitors at frontiers, (by month) (1981)	204
	Table XI-3.	Foreign visitors arrivals by modes of tra transport, (1981)	205
	Table XI-4.	Arrivals of foreign tourists in registered hotels, (by month) (1981)	206
	Table XI-5.	Arrivals of foreign tourists in registered hotels (by hotel category), (1981).	207
	Table XI-6.	Nights spent by foreign tourists, (by month) (1981)	208
	Table XI-7.	Nights spent by foreign tourists, (by hotel category) (1981)	209
	Table XI-8.	Foreign and domestic tourist nights, (by month) (1981).	210
	Table XI-9.	Total accommodation capacity (1979-1981) . . .	211
XII.	UAE:	. . . .	212
	Table XII-1.	Hotel development in the UAE (1975-1980) . .	213
	Table XII-2.	Number of registered hotel rooms in the UAE, (1975-1981)	214
	Table XII-3.	Annual room occupancy rates by category of hotels (1979)	215
	Table XII-4.	International tourist payments in the UAE, (1975-1980)	216

INTRODUCTION

This study was prepared by the Transport, Communications and Tourism Division (TCDC) of the United Nations Economic Commission for Western Asia (ECWA) in accordance with its 1982-1983 Programme of work and priorities.

The tourism programme of ECWA has been launched by the end of 1980 primarily to assess and to analyse the tourism development potentialities of the ECWA region emphasizing the intraregional tourism development policy options open to ECWA member countries. The programme also aims at proposing recommendations which could improve the tourism potential of the region and enhance the socio-economic benefits therefrom.

In 1981-1982 the programme has concentrated on the analysis of tourism development potential in the northern and southern parts of the ECWA region, and two reports were published: "ECWA/TCDC: Tourism development potential in the northern ECWA sub-region, Beirut, December 1981" and "ECWA/TCDC: Tourism development potential in the southern ECWA sub-region, Baghdad, December 1982".

Furthermore, a mathematical analysis of tourism resources and attractions in the ECWA region has been undertaken, and a report on quantitative assessment and classification of these resources was published in April 1983.

The present study has been essentially based upon the findings of the above mentioned studies and aims at formulating a development strategy capable of bringing about a steady tourism development by implementing new and appropriate tourism policies in ECWA member countries.

Besides the Introduction, the report includes six chapters. The first chapter examines the geographic and socio-economic conditions and features of the ECWA region, while the second chapter describes the main characteristics of the existing tourism resources and attractions, summarizing them in a quantitative and qualitative evaluation and classification.

The present state of tourism development in Western Asia is analysed in the third chapter of the study, at regional, sub-regional and country groups level. A summary of principal aspects of the present tourism development in the ECWA region, including tourism movements, transport, facilities and policies, concludes this analysis.

The fourth chapter of the report focuses on various problem areas to be tackled by a new tourism development strategy. In outlining and discussing the problems, much emphasis has been put on the accurate identification of the major constraints, obstacles and difficulties hindering tourism development in the study area.

The fifth chapter deals with the proposed tourism development strategy. The objectives and targets of a new tourism strategy for Western Asia are examined one by one and in detail. This chapter also includes the main policies to be followed and implemented by ECWA member countries within the framework of the new intraregional tourism development strategy.

The last chapter of the report covers several recommendations for the strategy implementation which could eliminate some of the problems identified in the study or emerging from the present state of tourism development in the ECWA region. The recommendations, arranged in nine groups, could enable the region to develop and improve its tourism potential and facilities thus providing the possibility of carrying out the strategy proposed.

During the preparatory stages of this study, field missions were carried out in the following ECWA member countries; in 1981: Jordan, Syria, the Yemen Arab Republic and Iraq, in 1982: Egypt, Oman and the United Arab Emirates; and in 1983: Kuwait, Bahrain and Saudi Arabia.

The findings of these missions and the replies received to the tourism questionnaires of the TCDC, sent respectively in February 1981, in June 1982 and in January 1983 to ECWA member countries, were used in the preparation of the study. Various other available sources of information and data, as well as several documents regarding the socio-economic and tourism development issues in the Middle East, were also consulted or utilized.

The conclusions, suggestions and recommendations of the report may require further refinement, comments and guidance from ECWA countries. They can however constitute an appropriate ground for implementing a comprehensive tourism development strategy in Western Asia during the next decade.

1. STUDY AREA

1.1. Geographic features

The study area can be divided into two distinctive geographic zones: the northern mountains and plains, and the southern plateaus.

The northern part of the ECWA region embracing Iraq, Jordan, Lebanon and Syria, borders on Turkey and Iran in the north and east, on Kuwait and Saudi Arabia in the south and the Mediterranean Sea in the west. Iraq, Jordan and Syria have common borders with each other, and through Syria they link with Lebanon. This sickle-shaped swath of green that arcs along the Euphrates and Tigris rivers, and across the rain-catching hills of the Levantine coast, is often called the "Cradle of Civilization" or the "Fertile Crescent".

The Southern part of the region comprising nine countries of Western Asia, namely, Bahrain, Egypt, Kuwait, Oman, People's Democratic Republic of Yemen (PDRY), Qatar, Saudi Arabia, United Arab Emirates (UAE), and the Yemen Arab Republic (YAR), covers the Arabian peninsula and the Nile Valley.

The Northern zone consists of highly folded ranks of generally recent rocks, part of a line traceable from East India, through the Himalayas to the Alps and Pyrenees. The marine sedimentary layers which occur as relatively thin bands over the southern-central plate regions, become much more developed in variety and thckness towards the north and east. In addition, they become locally disturbed, so that a structure of anticline and syncline is traceable over a large zone which includes Lebanon, Syria, Iraq, Qatar and Oman. Folding is on a very restricted scale, with very gentle arching of rock strata, often as single anticlines broken to a minor degree by local fractures, with overthrusting absent. The Lebanon mountains are the most developed of this pattern. Further to the north and east there is the Jebel Ansarieh of Syria, the somewhat more convoluted but open folds of Mount Hermon and the Anti-Lebanon, the Jebel Qalamoun of Damascus, Jebel Bishri near Palmyra, and others. In Iraq there are two continuations of these wrinkles, the Jebel Sinjar and Jebel Makhal.

The shallow upfolds of the Jebel Ahmadi in Kuwait, the Jebel Dukhan in Qatar and the Jebel Akhdar in Oman are of the same type. From Syria eastwards, it is noteworthy that all these anticlinal-synclinal structures are associated with the occurance of petroleum.1/

The distinguishing characteristic of the Middle eastern continental plateau, which forms the southern part of the ECWA region, is the basement of archaen granites and other metamorphics usually underlying later rock series.

In the central Arabian areas where larger parts of the basement is exposed, difference in rock type gives rise to varied land forms, such as isolated massifs of granite standing at a higher level than surrounding schists, conical hills, etc. The edges of the plateau are defined by massive fault-structure extending from Saudi Arabia northward into the Jordan Valley, as well as major cross-faults occurring in the south-west of the sub-region. Some faults run back into the centre of the plateau forming a number of small rift valleys which are sometimes covered by loose sands and serve as routes to the interior.

Topographic features often emphasized by extensive vulcanicity, such as those on both sides of the Gulf of Aden, contrast with the interior continental landscapes of the central and southern part of the sub-region. These basaltic rocks, occurring in layers of 300 to 1,000 meters thick, give rise to the imposing plateaus of the Yemen.

To the north of Yemen on the west coast of the Arabian Peninsula, the Asir and Hijaz highlands owe their heights to lava flows which towards the Gulf of Aqaba become less extensive.

1/ United Nations-ECWA: "Development of an integrated transport system for Western Asia", Volume II, "Aspects of transport demand", Beirut 1979, p. 9-10.

Considerable sand areas are another fundamental geographic feature of the region. When they are of a very fine texture and loose, they are liable to shifting by the wind. In other areas, more regular and stable dunes can be characteristic.

Where there is an extra fraction in desert sand, such as silt, clay or salt efflorescence, dunes give way to flatter and more stable formations that produce open plains where travel can be easy. Thus the desert may comprise many surface and local features reflecting various topographical and mineralogical aspects.

The vigour and freshness of relief forms in Western Asia are for the most part due to structural origin. However, evidence is present suggesting cycles at different geological periods of erosion and peneplanation, as well as deposition in the form of alluvial fans, outwash screes, sedimentation of lowland basins and the accumulation of aeolian deposits. Peneplanation and erosion are at the origin of the peneplain in Arabia. Erosion surfaces of various ages are observed around the upper Red Sea and lower Jordan rift, extending into Arabia. Other erosion surfaces resulting from oscillation are the Lebanon, Anti-Lebanon, Jebel Ansarieh, East Jordan and other.

Besides major peneplanation, there are minor oscillations of coastline that are traceable in all the sea areas, but mostly in the Eastern Mediterranean. Six to seven terrace levels can be traced in the Eastern Mediterranean and in the Red Sea. However, and for the last few thousand years, the sea level has been fairly close to the present level with some minor fluctuations that have produced raised beaches and developed coastal Sabkhas or coastal salt marshes, particularly developed on the Southern shores of the Gulf.[1/]

1/ UN-ECWA: ibid, p. 8-9 and International Union of Official Travel Organizations (IUOTO): "Study of the prospects for tourism development in the Middle East Region", Geneva 1970-1971.

As summarized in Table 1.1, the climatic characteristics of the study area are those of a long, hot summer and a relatively mild, rainy winter. In the northern sub-region, typical mediterranean climate (Lebanese and Syrian coast line) and dry subtropical weather conditions (Iraq and Jordan) depending on longitude and altitude are experienced. In the southern part of the region, significant temperature changes are witnessed from the Mediterranean costs of Egypt to the Arabian Gulf and Gulf of Aden areas. More important are temperature ranges over the day which are significant on inland locations such as Riyadh and Taif in Saudi Arabia and in the United Arab Emirates.

In the Yemens and the southern Asir area in Saudi Arabia, the wide variations in temperature are due to altitude differences. On the plateau of the YAR, winter temperatures fall close to zero degree. In summer, because of proximity to the Equator, temperatures are high, but by no means as high as in the rest of Arabia, owing to greater elevation, and due to a summer rainy season which gives a cloud cover.

Except for the Mediterranean coasts, North Yemen and adjacent areas of southern Saudi Arabia, the countries of the region have a strongly marked rythm of summer drought. The distribution of rainfall is largely influenced by the topography and the disposition of land and sea in relation to rain bearing winds.

As mentioned above, rainfall occurs mainly during winter and is almost entirely due to air masses of oceanic origin which have partially lost their moisture but have been rejuvenated by a sea track. In the northern ECWA sub-region, the damp air passes over the mountain ranges close to the Mediterranean depositing much of its moisture on the way, so that when it reaches the regions further inland, such as the Tigris/Euphrates basin, rainfall is relatively reduced. The high precipitation on the highlands in northern Iraq can be explained by the replenishment in moisture of air masses, from the evaporation from vast tracts of swamp and lake in lower Mesopotamia, and more distantly from the Arabian Gulf waters.

Table : 1.1

Climatic conditions in the ECWA region

(Temperature in Degrees Celsius and rainfall in mm)

Countries and Cities	January			July		
	max	min	Rainfall	max	min	Rainfall
Bahrain						
Manama	20	14	8	37	29	none
Egypt						
Alexandria	18	10	49	30	23	Slight
Cairo	18	8	5	35	21	none
Luxor	23	6	Slight	42	23	none
Iraq						
Baghdad	16	4	22	43	24	Slight
Basrah	18	7	36	40	27	Slight
Mosul	12	3	72	42	22	Slight
Jordan						
Amman	12	4	69	33	18	none
Kuwait						
Kuwait City	16	10	22	40	30	none
Lebanon						
Beirut	16	10	188	31	23	Slight
Oman						
Muscat	25	19	28	36	30	Slight
Salalah	28	18	Slight	28	24	28 mm
PDRY						
Aden-Khormaksar	28	22	5	36	28	5 mm
Qatar						
Doha	20	14	8	37	29	none
Saudi Arabia						
Jeddah	29	19	5	37	26	Slight
Riyadh	21	8	Slight	41	26	none
Syria						
Damascus	12	2	43	35	18	Slight

Table: 1.1

Cont'd

Countries and Cities	January			July		
	max	min	Rainfall	max	min	Rainfall
United Arab Emirates			3			none
Abu Dhabi	24	14	..	39	29	..
Dubai	23	13	..	39	28	..
Ras-al-Khaimah	23	13	..	39	28	..
Sharjah	23	13	..	39	28	..
Yemen Arab Republic						
Sana'a	25	0	..	30	10	45 mm
Hodeida	..	..	..	42	25	..
Zabid	32	19	..	40	28	14 mm

Sources :- Traveller's guide to the Middle East 1980, 2nd Edition, London 1980.

- Meteorological Tables, HMSO, London
- ".." means not available

Because of the relative intensity of rainfall in the northern ECWA countries, the rivers have a perenial regime, in contrast with other rivers and "wadis" with only seasonal or occasional run-offs in the remaining countries.

In the Yemens, there is a well-marked rainy season during the months of July, August and September resulting from a well developed southernly monsoonal current which is moist and unstable. On encountering the barrier of the Yemen mountains, rapid cooling occurs resulting in summer rains in the form of heavy intermittent showers. A minor secondary rainy season appears around March and is related to the Mediterranean regime characteristic of the other countries. These rains, as well as the summer rains, give rise to seasonal short-lived flooding with streams flowing for six to nine months a year and often producing heavy erosion.[1/]

The geographical location places the ECWA region as a "linking-gear" at the cross-roads of Europe, Africa and Asia. Some of the world's most important trade, transport and communications routes crossing the region, its long coastline bordering on the Mediterranean, the Red Sea, the Gulf and the Indian Ocean as well as its climatic conditions suggest an enormous potential for the development of tourism.

Because of relevant geological and human features, the study area has always afforded easy access for trade and travel. It has thus acted for centuries as a transit zone, and has also been a major meeting-place of people and ideas.

The consequences of the above underlined geographic characteristics on tourism infrastructure, flows and operations are examined in the following parts of this survey, under various aspects of tourism development potentialities and policies.

1/UN-ECWA: ibid, page: 14-16.

1.2. Economic and social indicators

The economic and social indicators which may be relevant for in-bound and out-bound tourism as well as for domestic tourism flows and policies are summarized in table 1.2.

Countries in the ECWA region belong to the three following groups: Oil economies, non-oil economies and least-developed countries.[1/] For the first group of countries (Bahrain, Iraq, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates) the range of GNP per capita is 3,000 to 26,000 dollars, for the second group (Egypt, Jordan, Lebanon and Syria) 650 to 1,600 dollars, whereas for the third group (PDRY and YAR) it is 460 dollars.

For the oil economies or high-income oil exporters, the predominance of the oil sector as the major income generator and the main balance of payments component is reflected in figures related to the GNP and to the balance of trade and current account. In fact, these countries have a current account balance surplus of 9 to 35 billion of dollars per year, Saudi Arabia and Kuwait being the leading states. This situation is, inter alia, relevant for the travel propensity abroad, resulting in high international travel expenditure.

All countries belonging to the group of middle-income/non-oil economies have a yearly current balance account deficit, mainly due to the high import needs and tendencies as well as due to unfavourable terms of trade.

As regards the least-developed countries, apart from the GNP per capita and other economic data, social indicators such as, life expectancy, adult literacy rate or population per physician are relevant.

The agricultural sector absorbs the largest share of economically active population in YAR, Oman, Egypt and PDRY. The predominant role of the service oriented activities, such as banking, commerce, financing, etc., in the oil exporting countries is reflected by the high proportion of the population active in this ector, reaching 73.5 per cent and 68 per cent in Kuwait and in Qatar respectively.

1/ UN-ECWA: Survey of economic and social developments in the ECWA region, 1981, 1982 and 1983 issues and the World Bank: World Economic Report, 1981, 1982 and 1983 issues.

Other major socio-economic indicators suggest that the region is not an economically homogeneous entity, where low and middle-income countries co-exist with high-income economies. The most important socio-economic features identical in all countries of the region are:

1) Largely undiversified economies, with one or two sectors contributing to the major share of GDP (Oil in the Gulf countries and agriculture in both Yemens and in Egypt).

2) The high rate of population growth due not only to the crude birth rate but also because of the labour force migrations, especially to the Gulf countries,1/ and

3) The rapid growth which has occured during the last decade in sectors associated with the building of infrastructures.

As the following parts of this report indicate, the socio-economic performance and particularities of the countries in the region largely affect the tourism sector which is highly dependent on the infrastructure, labour force and on the overall socio-economic development policies.

1/ However "the mismatch between the type of labour needed and that available in ECWA countries is, in some cases, so great that such countries are, at the same time, both major exporters and major importers of labour". See: UN-ECWA: "Toward a feasible path to economic co-operation and integration in Western Asia", in "Studies on development problems in countries of Western Asia", 1981; page 32.

Table 1.2 Selected economic and social indicators (1980-1981)

Countries / Indicators	Bahrain	Egypt	Iraq	Jordan	Kuwait	Lebanon	Oman
Population 1/ (1,000)	344	40,085	13,025	2,202	1,374	2,452	984
Area (1,000km^2) 3/	1	1,001	435	98	18	10	300
Average annual growth of pop. % 1/	5.5	2.6	3.3	5.0	6.9	0	4.7
Urban population % of total pop. 1/	85	45	65	63	90	76	22
GNP per capita US$ 3/	5,560 A/	650	2,410 A/	1,620	20,900	1,562 A/	4,380 A/
Annual average growth (1960-1981) % GNP per capita 3/	0.7	3.5	4.6	5.6	-0.4	..	4
Adult literary rate % 1/	50	41	44	68	68	72	38
Life expectancy at birth (years) 1/	67	57	56	66	73	68	55
% of pop. with access to safe water	..	66	62	61	89	..	..
Pop. per physician	..	1,050 B/	2,190	1,960	790 B/	..	..
Exports million US$ 2/	4,347	3,046 A/	10,529	732	17,511	1,262	4,422
Imports million US$ 2/	4,127	4,860 A/	16,700	3,149	7,282	2,666	2,287
Current account balance mln. US$ 2/	253 A/	-489 A/	2,742 B/	-33	13,768	..	1,183
Labour force % 1/							
Agriculture	3.4	47.4	30.1	13.3	2.4	18.9	50
Industries	38.6	18.3	21.3	18.9	24.1	25.3	21.7
Services	55.3	32.2	44.5	67.8	73.5	55.8	28.3
Not defined	2.7	1.8	4.1	–	–	–	–

Table 1.2 (Cont'd)

Countries / Indicators	PDRY	Qatar	S. Arabia	Syria	UAE	YAR
Population 1/ (1,000)	1,900	243	9,229	8,979	983	5,225
Area (1,000km^2) 3/	333	11	2,150	185	84	195
Average annual growth of pop. % 1/	2.2	8.8	6.3	3.5	13.9	1.9
Urban population % of total pop. 1/	37	86	53	48	81	11
GNP per capita US$ 3/	460	26,080 A/	12,600	1,570	24,660	460
Average annual growth (1960-1981) % GNP per capita 3/	..	..	7.8	3.8	2.4	5.5
Adult literary rate % 1/	37	59	34	55	66	8
Life expectancy at birth (years) 1/	45	66	57	65	68	42
% of pop. with access to safe water	24	..	64	75	..	4
Pop. per physician	6,000 B/	..	1,700 B/	2,570	780 B/	11,670 B/
Exports million US$ 2/	421	5,691	120,240	2,103	20,224	39
Imports million US$ 2/	1,096	1,949	35,244	4,663	9,648	1,699
Current account balance mln. US$ 2/	-137 A/	2,384	35,126	-640 A/	9,207	-655
Labour force % 1/						
Agriculture	43.3	3	24.2	32	2.4	69.2
Industries	17.0	29	20.6	31	47.5	9.9
Services	39.7	68	55.2	37	50.1	20.9
Not defined	-	-	-	-	-	-

Notes: A/ in 1980, B/ in 1976-77,
(..) not available, (-) non existent.

Sources: 1/ UN-ECWA: Demographic and related Socio-economic data sheet, NR. 3, Beirut, May 1982, (data cover 1980),
2/ ECWA: Survey of economic and social developments in the ECWA region, 1983, Baghdad, April 1983. (data cover 1981),
3/ World Bank: World Development Report, 1983. (data cover 1981).

2. TOURISM RESOURCES AND ATTRACTIONS

2.1 Natural

The countries of the ECWA region are endowed with various natural tourist resources and attractions which can be classified as follows: coastal lines, sea-resorts and zones, rivers and lakes, hill resorts, steppes, deserts and wildlife, spas, health tourism resorts, topographic attractions and climatic conditions.

In the north, the coastal zones of Lebanon and Syria, the Gulf of Aqaba and Basrah are the main sea resorts offering possibilities for swimming and water sports as well as possessing beautiful landscapes. Comparatively, the Lebanese coastline has been extensively developed, the Aqaba area is still developing and the Syrian coastline remains less-developed. Furthermore, the Lebanese and Syrian coasts also attract cruise traffic. The Euphrates river (in Syria and Iraq) and the Tigris in Iraq, represent with their lakes and river-side spots large potential and development opportunities for national and international tourism.

In the south, Mediterranean and Red Sea coasts of Egypt with swimming, sunbathing, fishing, diving and yachting opportunities; natural attractions of the Nile Valley, the Arabian peninsula with long coastal lines in west, east and south; the desert itself offer large varieties of touring possibilities.

Topographic tourist attractions in the ECWa region consist mainly of desert or semi-desert (steppes) areas and the rivers (Euphrates, Tigris and Nile). These resources are not yet fully developed and could be considered as subsidiary tourist attractions for visitors and for particular types of tourists. In particular, the desert, with its charming oasis, landscape and other specific characteristics can be linked to other tourist attractions.

The climatic conditions in the mountains of Lebanon and Syria allow the "summering" and have already been largely developed as summer resorts for regional tourists, being cool in summer and conveniently accessible to the cities. In winter, skiing has been developed, though at a limited domestic level. North of Iraq and the highlands of Jordan also offer cool mountain weather for "climate escaping" to local, domestic and regional tourism.

Furthermore, the temperate climate in winter and hill resorts of Saudi Arabia, Yemen and Oman are valuable assets for summering and winter tourism. The natural beauties of several spots and zones in the area are potentialities for developing various types of sightseeing and resort tourism. Natural parks and wildlife[1/] in Egypt, Bahrain and Oman; diving possibilities and under-water world in the Red Sea and in the Gulf, are among the most important natural features for the development of tourism in the region.

Another natural resource, most appropriate for health tourism and recreational purposes consists of water springs and spas, especially in Egypt, Iraq, Jordan, Syria, UAE and Yemen.

The region's major climatic attraction remains especially in the north, the mild, typical mediterranean weather conditions, allowing a long tourism season and a favourable "discomfort index" with low rainfall and humidity. Although partly exploited at present, this "sun, sea and sand attraction" is the main resource for domestic and intraregional as well as for international tourism demand.

1/ In this connection it is worth mentioning the World Wildlife Fund's action concerning the reestablishment in the Arabian Desert and in Oman, of the rare white antelope (the oryx) which is identified by some experts as the mythical unicorn of the Antiquity.

Due to the severe climatic conditions in summer, the southern sub-region's main tourist trade, both regional and international,is likely to flourish during the other seasons. Yet, the local climate escaping tendency will certainly create more regional and domestic demand for summering in the hill resorts and for sea and sun tourism on the beaches.

Although the long and hot summers in the plains of Iraq, in Syrian and Arabian deserts and in Southern Jordan can be considered uncomfortable, they may become tolerable with assistance of air-conditioning. However, these climatic features may constitute an alternative tourism development potential offering opportunity for extension of the tourist season in the region, outside of the summer months, in particular for attracting tourists from the European countries wishing to escape the rigours of their own winters.

In the region and in addition to the "classical" natural tourist spots already highly developed in Egypt and Lebanon, other new areas of natural attractions can easily be improved and organized for national and international tourism operations.

2.2 Historical

The Northern ECWA sub-region is the origin of one of the World's most ancient civilizations, the Sumerian, in what is now Iraq. It contains centres that have the title of the oldest continuously inhabited cities in the World, namely Damascus, Aleppo and Jericho. It also has presumably the World's oldest port, Byblos in Lebanon, which through its trade in papyrus, gave the World the word "Bible".

The Sumerian, Akkadian, Babylonian, Cananites, Nabatean, Assyrian, Phoenician and Ugarit civilizations flourished in this area. A people known to archeologists as the Natufians have build permanent settlements in the years around 10,000 BC on the hills beside the Eastern Mediterranean (now coastal mountains of Lebanon and Syria), and the oldest traces yet found in the World (9,000 BC) of early herdsmen have been discovered in the foothills of the Zagros mountains (Zawi Chemi Shanidar, in Iraq[1/]). Ur, Uruk, Eridu, Babylon in the Euphrates-Tigris Valley (Iraq) are the most famous city-states that formed one of the World's oldest urban civilizations.

1/ Firthermore, it is believed that man's first "dwellings" which were in caves of Northern Iraq go back more than 60,000 years as human habitat.

Later the ancient Greeks and Romans colonised large parts of the area and the Greco-Roman period endowed the sub-region with some of its largest archeological sites and best preserved ancient monuments such as Baalbeck, Palmyra, Busra, Jerash and Amman, to mention only but few.

Historical sites, particularly crusaders' castles in Syria, Lebanon and Jordan as well as religious buildings, fortresses dating from Islamic and Christian periods, are the most valuable historical tourist attractions in the entire study area, and fortunately are almost perfectly preserved, or still in use.

It is probably true to state that in no other part of the World is such a wide span of history, and such a cross - section of civilizations, so richly represented and in such a small area.

Within the sub-region, the "Holly land" and the zone covering Lebanon as well as the Western part of Syria and Jordan, forming the so-called "historical band" is the first area with the most important historical attractions and resources. The second historical area is the valley of the Euphrates and the Tigris containing various archeological and religious sites.

The southern sub-region also covers probably the most important historical and archeological relics of the world's ancient civilizations such as Ancient Egypt, Ancient Greeks and Romans, Kingdom of Sheba (or Saba), Arabs and Islam.

The holy places of Islam, Mecca and Medina, are in the sub-region and they attract every year millions of Moslems from all over the World to the area.

Egypt's 5,000 years of history and culture with world famous sites along the Nile Valley, in Alexandria and in the Cairo area are to be considered as major historical tourist resources in the sub-region.

Well preserved archeological zones and sites of Hellenic and Roman periods cover all the study area, from Egypt to Oman. The remains and influence of other ancient civilizations such as Dilmun in Bahrain, Kuwait and Qatar; South Arabian civilizations of the Sabeans and the Himyarites are also to be mentioned along with the most important historical tourist resources.

Once called "Arabia Felix", the major part of the sub-region itself represents one of the best preserved and genuine religious, historical attractions in the World: it is the centre and the birth place of Islam, and at the same time the cradle of the ancient Egyptian civilization and the original Arab culture.

Since the earliest times of the recorded world history, the sub-region has maintained its place and role as the "linking gear" at the cross-roads of Europe, Africa and Asia. The important trade routes of ancient times linking Asia to Mesopotamia, to Anatolia and to the Mediterranean Sea and to Africa were crossing the sub-region; the sea links were organized and operated by Arab sailors.

This historical and archeological background together with its geographical situation makes the ECWA region an attractive and appropriate receiving market for intraregional and international holiday and resort-tourism.

The indisputable historical and religious prominence of these attractions and resources linked with well-known important events is, in many locations and cases, fully utilized for tourism development and promotion. Nevertheless in many other cases, insufficient information for potential tourists, lack of access or protection, as well as low standard of presentation or inadequate development of the historical sites affect the "attractiveness" of the resources.

The incomplete exploitation of the historical and archeological resources of the region is also due to the missing marketing links among various tourism operators and tourism policy actions, such as travel trade, accommodation establishments, government sector and public authorities, information and publicity, promotion, preservation and presentation, tour-operation and tourist guides, market segments, tourist transport services, etc.

2.3 Socio-cultural and commercial

The socio-cultural tourism resources and attractions of the ECWA region consist of the following main elements: artictic and architectural features, festivals, distinctive local particularities, fairs and exhibits, business opportunities and attitudes towards tourists (traditional hospitality).

In the whole area, local architecture, with its mosques, monuments, shrines and souks, is of real interest to visitors. The unique socio-cultural blend of traditional and modern, of oriental and western features is the strongest attraction for international tourism demand. In all countries of the study area, music and dance festivals, genuine folk art and handicrafts, specialized products and bazaars are available. Much efforts have been made by the tourism authorities in recent years to develop the original distinctive and unspoiled features such as arts, handicrafts, cuisine, folk dresses,etc. to improve the quality and range of tourist attractions in various localities. Most of the major cities and tourist spots have well organized museums.

Highly influenced and guided by Islam, socio-cultural customs, attitudes and behaviours may affect international incoming tourism in many ways. The particularity of the region, especially in Saudi Arabia, Kuwait and in some Gulf states, suggests that foreign visitors should be better prepared for their travel to the region, in order to avoid undesirable, unintended consequences of their behaviour. Tourists should be informed of the specific social, cultural and religious environment they will encounter at their destination.

Besides this socio-cultural background, the region offers large possibilities of exploration for cultural tourism. In almost every country, architectural features (old and new), fairs and exhibits reflect large variety of artistic achievements.

The already developed and highly exploited socio-cultural resources and attractions, including ancient architectural features in the northern part of the region and in Egypt, could serve as example to other potential development areas in other countries. For example: magnificant and unique architecture in Yemen, genuine Arabic and Islamic culture in Saudi Arabia and the Gulf; traditions and architecture in Oman.

The traditional hospitality in the region is also an additional asset within the framework of tourist resources. This local congeniality and appropriate treatment of foreign tourists easily lead to better human contacts and understanding and considerably influence both the enjoyment of the trip by the tourists and the report they give to their friends, who are themselves potential visitors to the area.

Increasing business opportunities in the region also attract more visitors from abroad. In addition to the facilities offered by the city of Beirut, which is the traditional commercial, banking and business centre in the Middle East region; Amman, Bahgdad and Damascus are rapidly developing their business structures. While Amman and Damascus are gaining more importance in regional business traffic due to the instability prevailing in Lebanon; Baghdad has begun to attract increasing number of business tourists because of extensive development programmes of the Iraqi Government and expansion of the oil production and industry.

Regarding the commercial and business oriented tourism, the southern sub-region is experiencing rapid and very important changes. Due to the oil production and large investments, the oil exporting countries have been attracting during the last decade large number of visitors from abroad. In order to receive this new flow, the sub-region has rapidly developed its business structure, accommodation facilities, transport and communications systems. The fast modernisation and new development efforts will continuously improve the receiving capacity of the area thus allowing to promote further the intraregional and international tourism to the sub-region.

In the field of congress tourism, the region is not yet fully equipped and the potential demand which the area could secure remains limited. However, appropriate measure and investments could increase the changes of the region as business - and congress-tourism-destination.

The new tourism infrastructure, once the business tourism reaches its normal and steady rhythm of development, would and could serve for other tourism types, such as conventions and incentive tours, domestic tourism, holiday tourism, social tourism, etc.

The ongoing improvement and extension of the facilities as well as the enlargement of business opportunities will certainly further increase the number of visitors to the study area.

2.4 Recreational resources and attractions

The study area has various recreational resources and attractions conducive to local, domestic (national) and intraregional tourism. Beaches and beautiful mountain and coastal (sea, lake and rivers) sceneries attract large number of tourists and excursionists throughout the year. Opportunities for sport and educational facilities, for health tourism (hot and mineral water springs, spas), rest and shopping, picnic spots are developing although further improvements in facilities and servicing are required.

One of the most relevant feture in this context is the traditional summering (estivage) trips in the region. In fact, the cool and invigorating climate of the mountain resorts, particularly in Iraq, Lebanon and Syria, is highly appreciated by the local city dwellers and by visitors from other Middle East countries who come for summer vacations. Egypt also attracts large number of visitors from the region and from abroad, to its beaches, lake-and river-resorts. Hill resorts in Saudi Arabia, Yemen and Oman are also receiving increasing number of local visitors in summer months.

Night recreation, especially appealing for local and regional guests, in the form of gambling casinos, night clubs, dancings, discotheques available in Egypt and in Lebanon is somehow limited in other countries of the region.

Furthermore, the organized week-end tourism and sightseeing tours for recreational purposes are also becoming more and more popular in all countries of the ECWA region.

2.5 Accessibility and accommodation

Within the framework of a general analysis regarding the existing tourism potential, the "minimal touristic quality" of the basic infrastructure, especially for accessibility, as well as the availability of minimum standards for food and lodging facilities must be considered. In fact, accessibility through geographical location and vicinity to tourist generating markets may be the basis of a flourishing tourist industry.

The ECWA region is accessible by air, road, sea and rail. The main tourist entry points are the airports and the highways from Turkey to Syria and Iraq. The ports of Alexandria, Beirut, Lattakia and Tartus are equiped to receive regular passenger-ships, car-ferries, as well as cruise-traffic. There are rail connection between Turkey and the northern part of the study area.

Travel to the region is generally by air. Within the study area, there is also an important flow of air traffic but most intraregional travels are by road. International visitors tend always to travel by air to the ECWA region, however within the countries of the region they often use road transport. There is also a large transit visitors traffic by road, throughout the all study area, every year during the polgrimage season.

The road system in the study area is quite good regarding the entry points and main highways and substantial improvements are in progress. Urban and regional bus services are well developed throughout the area, although these are generally not suitable for international visitors. Most foreign tourists travel in the towns by taxis which may need effective control on prices. Service taxis are often used for longer distance travel.

Although facilities exist on the Egyptian, Lebanese and Syrian coasts, visits by passengers on ship to the region is, for the time being, very limited.

The rail network of the study area carries few pasenngers and much of the railway stocl is old. Except for the "Taurus Express" between Istanbul and Baghdad and in the near future, rail transport is unlikely to play an important role in carrying visitors to the region.

All the countries of the study area have their own international airports with good connections to other countries and there is unlikely to be a shortage of capacity in the near future as extension schemes are being foreseen for all of them. However, the most important air-access and transit points such as Jeddah, Bahrain, Dubai, Abu-Dhabi, Amman and Cairo airports need better organization to match the growth both in traffic and in catering capacity.

Touristic quality of the food and lodging facilities in the study area is rapidly improving. In the main cities and tourist centres, hotel accommodation and restaurants are available. Accommodation infrastructure is mostly suitable for regional and international tourists and other travellers with no general shortage.

In all countries of the study area new accommodation projects are initiated during recent years. These investment schemes cover hotels, motels, resort complexes, holiday villages and camping facilities. Most of the new structures include shopping, recreation (swimming pools, sports, sauna, etc.) and conference facilities.

In the southern sub-region the expansion of the hotel capacity has been more rapid than in the northern part of the ECWA region. Therefore in this area, some countries have already reached the saturation point. The dropping hotel occupancy rates, especially in higher categories, gave way to price-cuttings affecting the improvement schemes for the existing establishments. The growing competition among the international hotel management companies in the sub-region and the cost conscious hotel management are identical features in many countries.

It seems almost certain that the accessibility and quality components in the region's tourism potential are appropriate and adequate for the existing international and local demand, although other capacity problems in higher hotel categories are arising.

Furthermore, in order to cater for the growing number of low-budget visitors, second and third category hotel accommodation must be expanded and developed. As regards the catering industry, the facilities in the study area need further development and improvement, particularly in connection with the road and air-transport networks.

2.6 Human resources

Since data on existing and necessary labour force in tourism, hotel and catering sectors are not available, it is extremely difficult to indicate any conclusive evidence regarding the optimum situation of human resources for tourism operations in the ECWA region. The only obvious indication is the shortage of skilled and trained personnel in hotels and travel trade.

In some countries (Bahrain, Egypt, Iraq, Jordan, Lebanon and Syria) regular training courses at various levels provide basic and up-grading courses in hotel and tourism occupations. However, the training schemes suffer mostly from insufficient local demand and willingness to work in hotels and tourism trade. Increasing foreign labour force in the hotel sector of many countries in the ECWA region creates dependancy problems, since the origin of the imported manpower is often not the region itself.

Tourism being essentially a human activity based on human contacts and endeavours, its most valuable contribution can be made from human resources. However, this requires resources to be trained. At the same time, it has to be recognized that the tourist makes demands upon the country's human resources by asking for acceptable standards of service and behaviour. It is hence essential that appropriate human resources development - and training-programmes should be introduced.

The human resources' contribution to the overall tourism development will depend on the "awareness" of the country's population towards tourism as well as on the education of specific categories of the population in willingness and skills necessary for the tourism activities. Therefore, local population should be assisted with the tourist contact by educational programmes and through the media, designed to strengthen both appreciation of their own culture and respect for other cultures. This approach is complementary to the basic traditional hospitality which will be improved and better used.

2.7 Financial resources

The financial possibilities of the ECWA region, especially intraregional, are adequate for tourism investment projects. Public or private national or regional funds are increasingly available. During the last decade and as general rule the bulk of the new investment schemes in hotel industry was financed by the private entrepreneurship, the public sector being involved in financing tourist infrastructure projects.

However, in some countries (Iraq, PDRY and Syria), the government participation in financial resource allocation for the hotel sector development has also been very important.

This situation is likely to continue in the near future and there is increasing tendency for financing at regional level more tourism projects; for example, capital from the Gulf invested in Egypt, or joint ventures through Arab financing mechanisms. However, it must be stated that various regional investment funds do not yet give high priority to tourism investments and the ECWA region as a whole, has not yet developed any specific financial scheme for tourism development.

2.8 Summary of tourism potential in the region

In order to assess in a better way the tourism potential of the ECWA region, the tourist attractions and zones representing the tourism supply of the area, must be examined in relation to different tourism types (tourism demand). This can then lead to possible combinations between supply and demand, showing the most appropriate or optimum supply component for any given type of tourism demand. Based upon these basic supply and demand inter-relatio inter-relationships, Table 2.1 has been prepared indicating the main tourist attractions and zones against various tourism-types thus showing the major possible combinations.

The broad classification summarizing the tourism potential of the region embraces the following groups of tourist attractions and zones:

- Historical and archeological sites and zones;
- Sun, sand and sea-resorts, zones;
- Rivers, lakes and marshes;
- Religious centres;
- Capital towns and business centres;
- Mountain and hill resorts;
- Steppes, deserts, wildlife; and
- Spas, health tourism resorts.

These attractions are scattered across the ECWA region according to different types of topographic, climatic, socio-economic, cultural and historical particularities and background.

Table : 2.1

Tourist attractions and zones in the ECWA region and their relationship to various tourism-types

Tourist attractions and zones (supply)	Tourism types (demand)	Main combinations between supply and demand
1. Historical and archeological sites and zones	A. Individual tourists Aa. Foreign tourists Ab. Domestic tourists	1 = Aa, B, C, F
2. Sun -, sand and sea-resorts, zones.	B. Organized travel Ba. Foreign tourist groups Bb. Domestic " "	2 = A, B, C
3. Rivers, lakes and marshes	C. Intraregional tourism (individual or groups)	3 = A, B, C, F
4. Religious centres	D. Business travel	4 = I
5. Capital towns and business centres	E. Congress, conventions	5 = D, E, F, A, B, C
6. Mountain and hill resorts	F. Sea or land excursions, cruising and sightseeing	6 = H, J
7. Steppes, deserts, wildlife	H. Summering	7 = Aa, Ba, F
8. Spas, health tourism resorts	I. Religious tourism	8 = Ab, Bb, C, H
	J. Winter sports	

The attached, Map I, roughly indicates the location of the above mentioned attractions and zones, the map was prepared for all the ECWA region covering its northern and southern parts[1/], thus allowing an overall appreciation of the tourism development potential.

2.9 Evaluation and classification of tourism resources and attractions

Based upon the summary of tourism potential in the ECWA region including eight groups of tourist attractions and zones and eleven tourism types already illustrated in Table 2.1, a comparativ e analysis of tourism resources can be undertaken. The main objective of this analysis is the evaluation and the classification of tourism attractions in Western Asia which would enable the formulation of appropriate tourism policies, particularly in the field of marketing, and within the tourism development strategy to be proposed.

Furthermore, the evaluation of the tourism resources and attractions will also lead to establishing the attractiveness level for each zone in the ECWA region, as the receiving market, in relation to the tourism types representing tourist generating markets. This specific supply and demand relationship is the most important component for any adequate marketing, tourist product design and development policies.

The evaluation and classification process followed in this report is based both on qualitative and quantitative approaches.

For the qualitative analysis of the tourism resources and attractions in the ECWA region the following sources were fully utilized:

1/ For the analysis of the tourism potential in the northern and southern ECWA sub-regions, see; UN-ECWA-TCDC: "Tourism development potential in the northern ECWA sub-region", December 1981, pages: 15-19 (E/ECWA/TCDC/WP.1) and UN-ECWA-TCDC: "Tourism development potential in the southern ECWA sub-region"; December 1982, pages 17-22 (E/ECWA/TCTD/82/3).

- Information supplied by the tourism authorities of the countries in the region;

- Information and data obtained during the ECWA/TCDC field missions in the study area;

- Information contained in previous publications on the Middle East and on the Arab World as well as in guide-books to the region1/.

1/ International Union of Official Travel Organizations (IUOTO): "Study of the prospects for tourism development in the Middle East Region", Geneva 1970-1971; World Tourism Organization (WTO): "Evaluating tourism resources", Madrid 1981; T.Var: "The role of attractivity inventories in tourism planning:, published in "AIEST: Tourism Planning for the Eighties, Berne 1978", p. 292 ff; UN-ECWA: "Possibilities for co-operation in tourism in the ECWA region", Beirut, February 1976; Michel Chatelus: "Stratégies pour le Moyen - Orient", Paris 1974; A. Bonne: "State and Economics in the Middle East", London 1960; M. Herschlag: "An introduction to the modern economic history of the Middle East", Leiden 1971; M. Hussein: "Les Arabes au présent", Paris 1974; Middle East Year-Books 1980-1981 and 1982; A.G. Longrigg: "The Middle East:, Chicago 1970; A.R. Abu-Rabah: "A new approach to the Arab tourism development", Amman 1977; A.R. Abu Rabah: "Arab tourism today", Report presented to the first Arab Tourism Conference, February 1979; A. Al-Barbar: "Tourism in the Arab World - An introductory bibliography", Public Administration Series, 1980; M. Jenner: Arab tourism-An inside look at an outward movement, British Travel News, London 1981; "Traveller's guideto the Middle East", 2nd Edition, London 1980; Publications of the Arab Tourism Union (ATU), Amman; Publications on the Middle East tourism of the "International Tourism Quarterly", EIU, London; UN-ECWA: "Tourism development potential in the Northern ECWA sub-region", Beirut, December 1981; UN-ECWA: "Tourism development potential in the Southern ECWA sub-region", Baghdad, December 1982; UN-ECWA: "Mathematical analysis, evaluation and classification of tourism resources and attractions in the ECWA region", Baghdad, April 1983.

The quantitative analysis was undertaken by a consultant to the TCDC who has prepared a detailed mathematical evaluation and ranking of all tourism resources and attractions in the ECWA region[1/].

The results and findings of the mathematical analysis together with the qualitative analysis suggest that various ECWA member countries possess rich tourism resources and attractions, most appropriate for the development of tourism. Their aggregated ranking in the ECWA regional context shows that the countries in the northern sub-region (Iraq, Jordan, Lebanon and Syria) and Egypt have the most important historical-archeologican zones, sun-sea and climatic resorts, (Table 2.2). Regarding the other tourist resources and attractions, the aggregated ranking, including the relationships between the resources and the criteria to judge them, indicates that in many ECWA countries the classification of various resources are heavily affected by the climatic and socio-cultural conditions or by the level of available infrastructure. In fact, ECWA countries considered as a whole, have a total score of 1774 over the optimum (maximum possible) 3500, which represents 50.68 per cent.

The scores obtained by each ECWA country which must be considered in comparison to the optimum possible score (see Table 2.2) also indicates that for many countries, availability of limited number of tourist resources or attractions may sometimes mean higher development potential in some specific tourism fields such as, special interest groups.

1/ UN-ECWA: "Mathematical analysis, evaluation and classification of tourism resources and attractions in the ECWA region", Baghdad, April 1983.

Table 2.2: Aggregated ranking of ECWA countries by tourist resources and attractions

Country / Resources 1/	1	2	3	4	5	6	7	8	Total Score	Total Optimum
Bahrain	IX	VI	N.A.	N.A.	IV	N.A.	IV-V	N.A.	107	200
Egypt	II	II	I	III	I	N.A.	I	III	241	350
Iraq	VI	IX	II	IV	VI-VII	III	VIII-IX	IV	188	400
Jordan	III	IV-V	III	II	VI-VII	N.A.	II	V	199	350
Kuwait	XII	XI	N.A.	N.A.	X	N.A.	N.A.	N.A.	53	150
Lebanon	I	I	N.A.	N.A.	II	I	N.A.	I-II	186	250
Oman	X	VII-VIII	N.A.	N.A.	XI	V	VI	N.A.	97	250
PDRY	XI	XIII	N.A.	N.A.	XIII	N.A.	X	N.A.	53	200
Qatar	XIII	VII-VIII	N.A.	N.A.	XII	N.A.	N.A.	N.A.	52	150
Saudi Arabia	V	XI-XII	N.A.	I	VIII	IV	VIII-IX	N.A.	150	300
Syria	IV	III	IV	V	III	II	III	I-II	222	400
UAE	VIII	IV-V	N.A.	N.A.	V	N.A.	IV-V	N.A.	109	200
YAR	VII	XI-XII	N.A.	N.A.	IX	VI	VII	VI	117	300

Notes: I: First rank
XIII: Last rank
N.A.: Not available or limited resource or attraction

1/ 1. Historical, archeological sites and zones
2. Sun, sand and sea resorts
3. Rivers, lakes and marshes
4. Religious centres
5. Capital towns and business centres
6. Mountain and hill resorts
7. Steppes, deserts and wildlife
8. Spas, health tourism resorts

Source: UN-ECWA: Mathematical analysis, evaluation and classification of tourism resources and attractions in the ECWA region, April 1983, page 20.

Furthermore, the ranking of tourism resources and attractions, when considered not only at national level but within the regional concept, suggests that ECWA countries have a great variety of resources to be promoted and utilized for the development of intraregional tourism. (Table 2.3). Their regional priorities and ranking differ very much from their importance at national level.

The final evaluation (Table 2.4) showing the strength of appeal of different zones to various tourism - types, the so-called supply/demand relationship among the tourism resources and markets, points out that, for the ECWA region as a whole, the capital towns and business centres are the most attractive tourist zones. They strongly appeal to almost all kinds of tourism demand, except for summering, religious tourism and winter sports. The second most attractive tourism resources are "Historical and archeological sites and zones" and "Sun, sand and sea resorts". They are two chief attractions and they cover many of the tourism types indicated in Table 2.4.

It must also be noted that there is obviously no definite limits among the tourism types, and in many cases there may be close links between them. For example a holiday maker coming from one of the countries in the ECWA region may visit another country on a business-tour during some days, thus combining the two types of travel. Or, a business traveller from abroad may visit some tourist spots on a sightseeing tour or on an individual basis during a week-end.

Furthermore, because of their combining capacity for various tourism types and due to their rich tourism potential, some receiving zones and locations can be combined, thus allowing the so-called "multicentre tourism", covering more than one zone in a tourist tour. For example the Mediterranean or Red Sea resorts for Egypt combined with historical and archeological sites of the Nile Valley; or, business centres in the Gulf combined with sightseeing tours to their vicinity which possesses wild-life and desert attractions; or, the sea resorts on the Lebanese-Syrian coasts and in Aqaba combined with visits to major historical, cultural and social attractions surrounding them; or, business travels to Kuwait and Iraq which could also include various historical and archeological sightseeing possibilities.

Table 2.3: Most important regional tourist resources and attractions in ECWA countries 1/

Country	Major regional tourist resources and attractions
Bahrain	Business centres; desert and wildlife; sun and sea resorts.
Egypt	Rivers and lakes; business centres; wildlife and historical sites.
Iraq	Rivers and lakes; hill resorts; religious centres, health tourism and historical sites.
Jordan	Religious centres, desert and wildlife, historical sites and sea resorts.
Kuwait	Business centre, sea resorts.
Lebanon	Historical, archeological sites; sea and hill resorts; business centres.
Oman	Hill resorts; business centres; wildlife; sea resorts.
PDRY	Wildlife; sea resorts.
Qatar	Sea resorts; business centre.
Saudi Arabia	Religious centres; business centres.
Syria	Hill and health resorts; sea and historical zones.
UAE	Business centres; sea resorts; wildlife.
YAR	Health, hill and sea resorts; wildlife; historical sites.

1/ This table prepared on the basis of the table 2.2 indicates in each ECWA member country the most important tourist resources and attractions in a regional context.

Source: UN-ECWA: "Mathematical analysis, evaluation and classification of tourism resources and attractions in the ECWA region, April 1983, Baghdad".

Table 2.4: **Strength of appeal of different zones to various tourism - types in the ECWA region**

Tourist attractions and zones in the region (receiving markets) 1/	Tourism types (generating markets) 1/										
	Aa	Ab	Ba	Bb	C	D	E	F	H	I	J
1. Historical and archeological sites and zones	I	II	I	I	II	III	II	I	-	-	-
2. Sun, sand and sea resorts, zones	I	I	I	I	I	III	II	II	II	-	-
3. Rivers, lakes and marshes	II	I	I	I	II	III	III	I	II	-	-
4. Religious centres	II	II	II	I	II	-	-	II	-	I	-
5. Capital towns and business centres	I	I	I	I	I	I	I	II	-	-	-
6. Mountain and hill resorts	III	I	II	II	II	-	II	II	I	-	I
7. Steppes, deserts, wildlife	II	III	II	III	-	-	-	I	-	-	-
8. Spas, health tourism resorts	-	I	III	I	I	-	III	-	I	-	-

Note: 1/ See Table 2.1, 2.2 and 2.3 and Map I.

Rating:

I = Strong appeal
II = average "
III = weak "
\- = negligible or nil

3. PRESENT STATE OF TOURISM DEVELOPMENT

In this chapter the present state of tourism in the ECWA region will be examined under four main headings: tourist movements, payments, facilities and policies. Another additional analysis dealing with the most important travel mode to the region, namely air travel will also be introduced.

Tourist flows, payments and facilities to and within the ECWA region cover large variety of items: foreign visitors arrival at frontiers, tourist arrivals in accommodation facilities, domestic and foreign tourist arrivals and overnights in registered lodging establishments, tourist transport modes, accommodation capacity and tourist receipts and expenditure are the most important ones among them.

The countries in the region generally follow the international definitions of "tourist" and "visitor"1/. However only few ECWA countries have so far built adequate basis for tourism statistics, in many others such a base is either limited or non-existent2/.

Due to this situation, available information does not always lend itself to detailed analysis. Another additional difficulty is the non-comparability of data because of the different statistical coverage and compiling methods used in each country for tourism statistics.

1/ According to United Nations and WTO definitions, also adopted by the OECD, "visitors from abroad are "persons visiting a country other than that in which they have their usual places of residence, for any reasons other than following an occupation remunerated from within the country visited". It is useful to further classify international visitors into: (1) tourists, that is, persons who stay at least one night in an accommodation in the country, the purpose of journey being leisure, religion, holiday, business, family, mission, meeting, etc. (2) excursionists, that is, persons not staying overnight in the country visited". (UN: Provisional guidelines on statistics of international tourism, New York 1978; WTO: World Tourism statistics and OECD: Annual tourism reports).

2/ UN-ECWA "Survey of Economic and Social Development in the ECWA Region" 1983, Baghdad, April 1983, p. 76.

In spite of all these factors an overall view of tourism development within the ECWA region may be revealed out from Tables 3.1 to 3.12, which contain almost all kinds of available data.

Other available figures on tourism traffic, payments and lodging capacity are given insome eighty country tables in the Annex to this report. The information by country illustrates the most recent and up-to-date developments in tourism, covering all the countries of the ECWA region.

3.1 Tourist movements

Table 3.1 indicates the world total of international tourist arrivals at frontiers and the share of the Middle East region composed mainly by ECWA member States. Although increasing at a relatively high rate, tourist arrivals in the Middle East are only 2 per cent of the world total. This is definitely not commensurate with the very rich tourism potentialities of the region. The back-ground, particularities and problems of the present state of tourism development will be thoroughly discussed in the following parts of this report.

Various aspect of tourism movements in the ECWA region, including international and national tourism, are illustrated in Table 3.2. Statistical evidence points to a larger share of Arab tourism in the region's incoming visitors traffic; in fact the past of Arab visitors in the total number of foreigners visiting the study area is in average over 40 per cent; the highest share registered being in Jordan (77.8 per cent) and in Syria (74.9 per cent), and the lowest in the Yemen Arab Republic (32.3 per cent).

The same fact is also proven by the share of Arab visitors in the total number of foreign tourists arrivals in hotels and in the total number of overnights:; These proportions are very high ins ome receiving countries such as in Iraq (85.3 per cent of foreign arrivals and 93.2 per cent of foreign nights in hotels are from Arab countries, and in Syria (73.8 per cent and 68.7 per cent of foreign arrivals and nights in hotels respectively). Oman has the lowest share of Arab tourists arrivals and nights in registered hotels (about 20 per cent). (See Table 3.2).

Table 3.1 World total of international tourist arrivals at frontiers (1980 - 1981) (By Region)

Region	Tourist arrivals (in 1'000)		% share		annual variation %	
	1980	1981	1980	1981	1980/79	1981/80
Africa	5,744	6,595	2.1	2.3	10.7	14.8
Americas	56,070	56,698	20.0	20.0	5.3	1.1
East Asia and the Pacific	14,264	15,338	5.1	5.4	8.2	7.5
Europe	196,504	197,262	70.2	69.6	2.6	0.4
Middle East	5,569	5,716	1.9	2.0	13.9	2.6
South Asia	1,903	2,011	0.7	0.7	5.4	5.7
World total	280,054	283,620	100	100	3.8	1.3

Note: Based on available data from Bahrain, Egypt, Iraq, Kuwait, Lebanon, Libyan Arab Jamahiriya, Syria and the YAR.

Source: World Tourism Organization (WTO), Regional breakdown of World tourism statistics 1977-1981, 1982 Edition, Madrid 1982.

The figures concerning Egypt and Iraq show large tourism traffic and longer length of stay in hotels. This fact is most probably due to more developed tourist industry of these countries and to the variety of tourist resources and facilities. In other countries of the ECWA region the average number of nights spent by foreigners is fluctuating between 1 to 5 nights, except for the YAR whose official estimates indicate 10 nights.

Available country statistics show that, there is not any typical peak tourist season in the region and thus the usual problems of seasonality do not occur; a comparatively regular flow of foreign visitors can be easily depicted in the countries of the study-area as the tables in the Annex illustrate.

A time series covering international tourism flows in the ECWA region over five years (1976-1980) is given in Table 3.3. Albeit its comprehensiveness, data contained in the table are not strictly comparable due to the fact that they do not follow uniform data collecting systems and they are mostly estimates.

Regarding the structure of national (domestic) tourism in ECWA member countries the only source of information is confined to the arrivals and overnights of domestic tourist in hotels in Egypt, Iraq, Kuwait, Oman, Syria and the Yemen Arab Republic. (See Table 3.2).

This data can not be sufficient for acurate analysis. However it can be stated that growing prosperity, further urbanization, car ownerhsip and increasing leisure-time and travel possibilities will certainly contribute to the future increase of national tourist flows. Furthermore in times of political and military turmoil, national tourism could still continue to be increased at a reasonable pace.

As regards the modes of transport used by foreign visitors arriving in the region, available iformation suggests that the air transport is the most important mode for incoming visitors (Table 3.4). However, ratios of arrivals by land are very high in countries which are directly or indirectly connected to the highway or railway systems of neighbouring countries outside the ECWA region (Syria, Iraq, Kuwait and Jordan).

Table 3.2 Tourist movements in the ECWA region (1981)

Countries / data	Bahrain	Egypt	Iraq	Jordan	Kuwait	Lebanon
Arrivals of foreign visitors at frontiers: Total	422,820	1,376,027	1,564,234	1,635,614 1/	1,474,845 2/	764,686 3/
Arabs	169,415	578,786	817,661	1,155,934	..	..
% share	40.1	42.1	52.7	77.8	..	..
Arrivals of foreign tourists in hotels: Total	315,970	623,893 1/	1,150,095 1/	..	107,920	133,615 4/
Arabs	..	..	980,693	..	54,928	..
% share	..	..	85.3	..	50.9	..
Nights spent by foreign tourists in hotels: Total	496,637	9,805,715	13,532,689 1/	..	374,990	595,019
Arabs	..	4,636,612	12,613,739	..	164,289	..
% share	..	47.3	93.2	..	43.8	..
Arrivals of domestic tourists in hotels	..	48,939 1/	2,403,050 1/	..	444	..
Nights spent by domestic tourists in hotels	..	..	6,447,010 1/	..	1,166	..
Average number of nights spent by foreigners	1.6	15.7	11.8	..	3.5	4.5

Notes: 1/ In 1980 and only selected hotels.
2/ Incl. Kuwaitis.
3/ Passengers arrivals in Beirut Intern. Airport.
4/ Total guests number in Beirut hotels.

Cont'd/...

Table 3.2 (Cont'd)

Countries / data	Oman 5/	PDRY	Qatar	S. Arabia	Syria	UAE	YAR 9/
Arrivals of foreign visitors at frontiers: Total	198,062	..	..	879,368 7/	1,075,100	..	42,014
Arabs	127,858	..	..	418,026	805,614	..	13,585
% share	64	..	..	47.5	74.9	..	32.3
Arrivals of foreign tourists in hotels: Total	71,846	..	108,846	..	436,012	532,000 8/	39,283
Arabs	13,610	..	34,951	..	322,017	..	13,109
% share	19	..	32.1	..	73.8	..	33.4
Nights spent by foreign tourists in hotels: Total	262,203	79,000 6/	420,158	..	1,593,330	..	392,830
Arabs	53,657	..	152,860	..	1,095,431	..	131,090
% share	20.5	..	36.4	..	68.7	..	33.4
Arrivals of domestic tourists in hotels	10,791	..	..	..	..	..	88,287
Nights spent by domestic tourists in hotels	37,460	..	..	..	1,589,166	..	438,543
Average number of nights spent by foreigners	3.6	..	3.9	..	3.6	..	10

Notes:
5/ In 1980.
6/ 1980, in Aden.
7/ Pilgrims.
8/ In 1980: Total arrivals.
9/ In 1980.

Sources: Compiled by ECWA/TCTD on the basis of available data in country tables attached to this report.

Table : 3.3

International tourism movements in the ECWA region
(1976 - 1980)

Country	Tourist visits (in 1'000)					Tourist nights (in 1'000)					Average length of stay (night)				
	1976	1977	1978	1979	1980	1976	1977	1978	1979	1980	1976	1977	1978	1979	1980
Bahrain	466	487	487	500	515	1,250	1,350	1,400	1,435	1,460	2.7	2.8	2.9	2.9	2.8
Egypt	913	925	967	1,065	1,220	6,300	6,341	7,137	7,104	8,000	6.9	6.9	7.4	6.7	6.6
Iraq	630	722	720	690	620	1,250	1,300	1,400	1,200	1,150	2.0	1.8	1.9	1.7	1.9
Jordan	1,063	1,773	1,087	1,203	1,200	8,000	13,000	8,000	9,000	8,900	7.5	7.3	7.4	7.6	7.4
Kuwait	88	96	107	114	118	330	345	366	389	400	3.8	3.6	3.4	3.4	3.4
Lebanon	118	122	109	118	115	400	416	412	469	460	3.4	3.4	3.8	4.0	4.0
Oman	18	20	20	25	26	85	90	100	125	128	4.7	4.5	5.0	5.0	4.9
PDRY	18	20	25	28	25	64	71	90	98	92	3.6	3.6	3.6	3.5	3.7
Qatar	100	115	125	110	116	525	560	582	441	450	5.3	4.9	4.7	4.0	3.9
Saudi Arabia	719	739	750	780	789	960	1,000	1,050	1,200	1,260	1.3	1.4	1.4	1.5	1.6
Syria	1,390	1,249	1,074	1,279	1,150	1,586	1,341	1,291	1,778	1,620	1.1	1.1	1.2	1.4	1.4
UAE	12	15	15	20	22	60	80	80	90	92	5.0	5.3	5.3	4.5	4.2
YAR	30	35	38	42	40	170	186	210	220	215	5.7	5.3	5.5	5.2	5.4

Note : Most of the figures in this table are estimates. Due to different definitions, compiling methods and estimate - bases, they are not strictly comparable ith those published by various National Tourism Authorities or by International Organizations.

Source: Robert Senior : The orld Travel Market, London 1982.

In Egypt, arrivals by sea amounting to 15.2 per cent of the total number of visitors suggest the importance of cruise and regular passenger traffic.

3.2 Tourism payments

World total international tourism receipts and expenditure by region are given in Table 3.5. The share of the Middle East in world tourism receipts is relatively low (3.4 per cent), while its share in tourism expenditure is quite high (5.3 per cent). Consequently the region has a large deficit on its tourism account. This situation is mainly due to the growing outbound travel propensity in some countries of the ECWA region such as, Saudi Arabia, Kuwait and the United Arab Emirates.

The high foreign travel expenditure of some oil producing countries singled out in Table 3.6, are closer to the international tourism expenditure of some industrialized countries. (Saudi Arabia 2.8, and Kuwait 1.1 billions of US $). For comparison, in 1981 the international tourism expenditure of Austria, Belgium, Sweden, Switzerland, Italy and Denmark were 2.8; 2.7; 2.2; 2.1; 1.7; and 1.3 billions of US$ respectively[1/].

Furthermore, although very little data are available, the major destinations of the outbound tourism from ECWA countries seem to be Western Europe (in particular the United Kingdom), Maghreb and the Far East. To a certain extent, the IATA figures concerning Middle East-Europe and Middle East/Africa-Far East air routes confirm this trend. In fact, the growth rate of schedule passenger traffic on Middle East-Far East services is the highest of all route areas. (See IATA statistics 1980-81-82).

As regards the international tourism receipts within the ECWA region, figures given in Table 3.6 reflect relatively high level of tourist foreign exchange income of Saudi Arabia, Jordan, Kuwait and Egypt. As to other Mediterranean tourist receiving countries in 1981, the international tourist receipts were: Greece (1.9); Spain (6.7) Italy (7.6) billions of US$[2/].

1/ OECD: Tourism policy and international tourism in OECD member countries, Paris 1982, page. 145.

2/ OECD: ibid., page 145.

Table 3.4 Arrivals of foreign visitors in the ECWA region by modes of transport

Country	Year	by air		by sea		by road		total	
		number	%	number	%	number	%	number	%
Bahrain	1981	496,201	89.2	60,292	10.8	——	——	556,493 5/	100
Egypt	1979	859,683	80.8	162,196	15.2	42,200 4/	4.0	1,064,079	100
Iraq	1979	238,619	20.4	——	——	929,368	79.6	1,167,987	100
Jordan	1981	583,288	36.9	75,364	4.8	1,890,688 1/	56.4	1,580,601	100
Kuwait	1979	461,184	20.6	38,227	2.2	1,268,848	71.8	1,768,259	100
Oman	1979	198,062	100	——	——	——	——	198,062	100
Qatar	1979	286,707	100	——	——	——	——	286,707	100
Saudi Arabia	1982	623,425	73	55,735	6.5	174,395 3/	20.5	853,555 2/	100
Syria	1981	106,394	10	31,749	2.9	936,957	87.1	1,075,100	100
YAR	1980	39,014	92.9	3,000	7.1	——	——	42,014	100

Source: Compiled by ECWA/TCTD on the basis of available data in country tables attached to this report.

Notes:
1/ in addition 31,261 (1.9%) arrivals by rail.
2/ Pilgrims.
3/ incl. rail.
4/ incl. rail.
5/ incl. transits and excursionists.

Table 3.5 World total international tourism receipts and expenditure, by region (in millions of US Dollars) (1980-1981)

Region	Tourism receipts				Tourism expenditure			
	1980	1981	% share 1981	1980/1981 (%)	1980	1981	% share 1981	1980/1981 (%)
Africa	1,836.1	1,931.1	2.0	5.2	2,379	2,523	2.7	6.1
Americas	20,883	24,509	25.5	17.4	19,638	23,072	24.6	17.5
East Asia and the Pacific	7,125	8,216	8.6	15.3	8,767	9,419	10.1	7.4
Europe	61,431	56,984	59.4	-7.2	58,081	52,248	55.8	-10
Middle East 1/	3,080	3,301	3.4	7.2	5,534	5,924	6.3	7
South Asia	993	1,047	1.1	5.4	322	426	0.5	32.3
World Total	95,348.1	95,988.1	100	0.7	94,721	93,612	100	-1.2

Note: 1/ Based on available data from: Egypt, Iraq, Jordan, Kuwait, Lebanon, Libyan Arab Jamahiriya, Saudi Arabia, Syria and the YAR.

Source: WTO, ibid, 1982.

However, income levels indicated for some ECWA countries show the good performance and the potential strength of incoming tourism, especially for religious and business travel.

Table 3.7 representing the international tourism payments in the ECWA region by countries and over five years (1976-1980) may be useful as general information. These figures are mostly estimates and because of the methods used they differ from other official data available elsewhere. Therefore at this stage any further comparison or interpretation among countries is bound to be not relevant.

3.3 Tourist facilities

Available information concerning the accommodation capacity of hotels and average annual rates of hotel occupancy in ECWA countries are given in Tables 3.8 and 3.9.

The reliability problem of longer time-series makes it very difficult to illustrate the increase in hotel capacity; the only logical conclusion which may be drawn, concerns the relatively high occupancy rates and the concentration in upper classes (de luxe and 1st category) of the hotel capacity in many ECWA countries. (See country tables in Annex to this report)[1/].

Compared to the other "new comers" into business-tourism traffic, Egypt as a classical tourist receiving country has a larger hotel capacity (57,202 beds in 1980) which has recently undergone a rapid growth. The same growth pattern is present in Iraq, Jordan, Saudi Arabia, Syria and in the United Arab Emirates. The other particulars, such as repartition of hotel capacity and occupancy rates by hotel categories, manpower distribution, etc. are shown in the country tables annexed to this survey.

1/ In particular, tables covering the hotel capacity in Saudi Arabia are very well illustrating the development process in lodging industry. (Tables X-1, X-2, X-3 in Annex).

Table 3.6 International tourism payments in selected ECWA countries

(in millions of US $)

Country	Year	International tourism	
		Receipts	Expenditure
Bahrain 2/	1981	...	131 3/
Egypt	1981	375	630
Iraq	1981	170	...
Jordan 2/	1981	504	339
Kuwait	1981	452	1,123 4/
Lebanon	1977	65	...
PDRY	1981	4	10
Saudi Arabia	1981	1,573	2,761
Syria	1981	175	241
UAE 1/	1980	219	2,507
YAR	1981	34	44

Notes: 1/ In millions of Dirham.
2/ Overseas tourist visits provide about 10% of the GDP in Bahrain and about 22% of the GDP in Jordan. (R. Senior = The World Travel Market, ibid, p: 19).
3/ About 33% of the total consumer spending. (R. Senior, ibid).
4/ About 25% of the total consumer spending. (R. Senior, ibid).

Source: WTO, World Tourism Statistics, 1982.

Table : 3.7

International tourism payments in the ECWA region

(1976 - 1980)

(in millions of US$)

Country	Tourist receipts					Tourist expenditure					Balance				
	1976	1977	1978	1979	1980	1976	1977	1978	1979	1980	1976	1977	1978	1979	1980
Bahrain	136	158	173	200	235	180	210	240	270	300	-44	-52	-62	-70	-65
Egypt	223	644	586	601	773	124	172	258	248	243	99	472	328	353	530
Iraq	86	89	108	165	180	250	287	312	336	350	-164	-198	-204	-171	-170
Jordan	207	288	340	444	519	121	128	208	298	361	86	160	132	146	158
Kuwait	103	144	160	351	377	249	307	386	826	1,339	-146	-163	-226	-475	-962
Lebanon	70	90	110	135	160	95	110	125	140	160	-25	-20	-15	-5	0
Oman	25	32	43	57	70	60	80	105	130	160	-35	-48	-62	-73	-90
PDRY	3	3	5	3	4	2	4	4	5	6	1	- 1	- 1	- 2	- 2
Qatar	112	136	157	180	200	125	160	200	240	270	-13	-24	-43	-60	-70
Saudi Arabia	688	825	1,035	1,196	1,343	672	930	2,413	3,037	3,526	16	-105	-1,378	-1,841	-2,183
Syria	100	110	125	136	156	148	70	54	107	177	-48	40	71	29	-21
UAE	21	24	36	45	53	26	32	40	48	65	- 5	- 8	- 4	- 3	-12
YAR	8	12	12	27	40	7	10	10	22	32	1	2	2	5	8

Note : Figures in this table are mostly estimates. They, sometimes differ very much from other data published elsewhere. However they may provide a data basis over five consecutive years.

Source: Robert Senior : The World Travel Market, London 1982.

Table 3.8 Registered accommodation capacity and occupancy rates in selected ECWA countries

Country	Year	Number of available		Annual average occupancy rate (%)	
		Rooms + suits	beds	room	bed
Bahrain	1981	3,572	5,710	....	....
Egypt	1980	....	57,202	78.3	62.5
Iraq	1980	29,505	77,434	....	70.7 2/
Jordan	1980	3,502	6,579 1/	....	....
Kuwait	1980	2,732	4,249	37.6	24.2
Lebanon	1979	....	6,685	....	....
Oman	1980	793	1,309	....	55.5 2/
PDRY	1980	....	1,171	....	20
Qatar	1981	1,235	1,836	....	62.6
Saudi Arabia	1982	21,263	45,000 3/	....	....
Syria	1981	....	21,611	....	40
UAE	1980	9,222	20,000 3/	42	....
YAR	1980	1,914	8,307	20	28

Notes: 1/ Total accommodation capacity: over 30,000 bed-places.
2/ Average room and bed occupancy.
3/ Estimates.

Source: Compiled by ECWA/TCTD on the basis of available data exposed in country tables attached to the present report.

Table 3.9 Registered hotel accommodation capacity in the ECWA region (1976-1980) 1/

(in 1,000 beds)

Country	1976	1977	1978	1979	1980	Notes and comments 2/
Bahrain	12	14	15	15	16	in 1981 in registered hotels = 5,710 beds.
Egypt	18	20	24	24	26	Total accommodation capacity = 57,202 beds.
Iraq	8	10	10	10	9	Total accommodation capacity = 77,434 beds.
Jordan	27	28	30	31	32	————
Kuwait	4	5	5	6	7	International hotels - 4,249 bed-places
Lebanon	6	7	7	7	7	————
Oman	..	..	..	1	1	————
PDRY	..	..	..	..	..	in 1980 = 1,171 bed-places were available.
Qatar	5	6	6	7	7	International hotels = 1,836 beds.
S. Arabia	16	18	18	20	20	in 1982, total accommodation capacity = 21,263 rooms/45,000 beds
Syria	20	21	21	23	23	————
UAE	..	..	..	..	..	Available rooms in 1980 = 9,222; (20,000 beds).
YAR	2	2	3	3	3	Total capacity = 8,307 bed-places.

Notes: 1/ The figures are largely estimated on the basis of available data and are not comparable because of different data basis, compiling methods and coverage.

2/ According to the latest WTO statistics total capacity of hotels in the world for 1981 has reached 8,7 millions of rooms (16,8 millions of beds). The share of the ECWA region was 0,9% (75,438 rooms = 157,942 beds).

Sources: - Robert Senior: The World Travel Market, London 1982.

- WTO, ibid, 1982.

3.4 Tourism development policies

3.4.1 National

Although most of the governments in the ECWA region feel that tourism could be able to contribute to the general welfare of their nations, the degree of priority given to the tourism sector activities varies very much according to countries. In the study area four distinct approaches can be depicted:

1) Countries with already developed tourism structures such as, Egypt, Jordan and Lebanon.

2) Countries with stronger government (public sector) involvement in tourism development such as, Iraq, PDRY and Syria.

3) Countries which are following policies for specific tourism forms, attracting "special interest groups" such as, Pilgrimes, business-men, etc. (Kuwait, Qatar, Saudi Arabia and the United Arab Emirates).

4) Countries with not yet fully utilized tourism development potential such as, Bahrain, Oman and the Yemen Arab Republic.

This is obviously not a rigid and definite limitation. Because, national tourism policies conducted by ECWA member countries may sometime have common features only for a given time period, since the policies are dictated by the overall socio-economic development process, subject to frequent changes. Furthermore, it is very difficult to summarize various tourism development policies in a limited number of cases grouping them by countries; the policy issues and their interconnexions are numerous, and the criteria for categorizing them are not always easy to establish.

In spite of these difficulties the following general approaches can be pointed out:

In the northern part of the ECWA region, Iraq's government tourism policy is based upon the link between the development of tourism and that of the socio-economic conditions of the people. Therefore domestic tourism is the main field of activity in the tourism sector and takes the major part in the allocation of resources for investment.

The prioritary actions in this field respond to the growing demand for diversified tourism services and aim at improving the social development of the individual, the family, and the society as a whole.

In the field of tourism planning, the first steps were undertaken during 1974 through the National Tourism Development Plan which established objectives and guidelines for the development of tourism in Iraq based on multi-criteria analysis and provided a master plan for the period 1975-1985 in two five-year phases. The plan covered accommodation and compelementary services, by-laws, implementation policy, investment programmes and identified the steps to be taken in order to reach a balanced development in all sectoral activities related to its implementation. Complementary studies concerning the Northern Region, priority areas and pilot projects were and are still being carried out by the State Organization for Tourism.

Taking the National Tourism Development Plan as an indicator, the Ministry of Planning has approved increasing investments in tourism to face the large and growing demand for accommodation and other tourism facilities in the country. Priority fields are: domestic tourism, official incoming business tourism and social-political tourism[1/].

1/ Republic of Iraq, State Organization for Tourism (SOFT): "Future of tourism, government responsibilities" submitted to the General Assembly of the World Tourism Organization and to the World Tourism Conference in Manila, 1980.

In Jordan, tourism is considered as a major foreign currency earner, and the private sector's activities in this field are supported by various government incentives and inducements. Furthermore, the tourism development policy covers various aspects of tourism planning and promotion. A complete tourism legislation constitutes the general frame for tourism organization and development, and guides the public sector's efforts in this field. Tourism is a component part of the new five year development plan (1981-1985) and the government targets for 1985 are; 2.1 million of foreign visitors and approx. 800 million US$ international tourism receipts.

Tourism is also included in regional and local land-use (physical) plans. Specific tourism land-use plans or regional development studies for the Jordan Valley, Aqaba and Northern Jordan are available or under preparation. Large efforts are deployed in the field of tourism vocational training in order to diminish dependence on foreign manpower and to provide qualified personnel for the new hotel investments.

In Lebanon, the country's tourism industry, once one of the most important in the ECWA region, continues to suffer heavily from political instability. Tourism development in Lebanon has always been based on private sector's initiative and promoted according to specific socio-cultural structure of the country. The future policies to be adopted and carried out by the authorities will be guided by the outcome of a peaceful settlement of the Middle Eastern political situation and tourism will become, most probably, one of the priority areas within the overall national development and reconstruction programme.

In Syria, during the last years the government gave particular attention to the development of accommodation capacity and simultaneous improvement of the tourism manpower sector. Promotional measures regarding social tourism, youth and workers tourism were also intensified. Public tourism investment and development companies were established and their strengthening was among the prioritary actions. Tourism has been included in the long range economic planning undertaken by the government and basic surveys were commissioned and carried out. The country possesses a comprehensive plan to develop the tourism sector and for coastal areas there are land-use plans ready to be implemented and public land is available.

In the Southern ECWA sub-region in general, and in countries such as Egypt, Oman and the Yemen Arab Republic in particular, national tourism development issues are incorporated into the overall socio-economic development strategy and planning. The place and role of the tourism sector within the general framework of economic policy and development strategy are defined and appropriate measures are foreseen or implemented.

In some other countries, such as in Saudi Arabia or the United Arab Emirates, and despite the growing importance of religious and business-tourism, visitors traffic and commercial and financial activities connected therewith, the decision-making authorities at national level do not follow any precise strategy or policy covering the tourism sector or part thereof. Government decisions directly concerning the tourism sector, such as hotel projects, catering and transport facilities or the creation of business-conference centres are considered as construction, building or service sectors' projects and dealt with accordingly. Furthermore and as another example, the billions of dollars worth annual polgrimage traffic and all the connected issued which are directly concerned with religious tourism and which must be considered as an integral part of the overall development and public management programme of the tourism sector, were not treated as such.

The countries with high development potential for holiday and resort tourism (Egypt, Yemen, Oman) and the countries with large commercial and financial opportunities for the promotion of business tourism (Bahrain, Kuwait, Qatar, Saudi Arabia, UAE) have not yet resolutely faced the tourism problems through appropriate policy measures. Various aspects of tourism policies, such as research and study, statistical data collecting system, management of tourist facilities, promotion of tourism operations, development and improvement of tourism potential and facilities, manpower training and frontier formalities facilitation are not completely subjected to policy-making processes.

Under such circumstances, in the southern sub-region, the utilization of the tourism potential and the promotion of national, intraregional and international incoming tourism suffer from the lack of co-ordinated and planned national tourism policies.

3.4.2 Intraregional

Tourism development policies at intraregional level can be examined under three different aspects: multinational policy issues, bilateral co-operation and joint regional financial institutions and ventures.

3.4 3.4.2.1 Multinational

Attempts to promote tourism in the region at multinational level date back to 1954 when an "Arab Tourism Union" (ATU) was established. The Union's main objective is co-ordination and co-operation among national tourism organizations in the Arab World to promote tourism and other related activities. In order to attain its objectives, the Union conducts research, surveys and studies; provides technical assistance and expertise necessary for the creation of appropriate tourist services; attempts to unify tourism legislations, and disseminates tourism information and statistics through various periodical and other publications.

The Arab Tourism Union is the official tourist organization of the Arab League and comprises all Arab countries. In 1978 a "memorandum of understanding" was signed between ECWA and ATU, establishing "co-operation and co-ordination to the fullest extent possible" between the two organizations[1/].

1/ See: Statutes of the Arab Tourism Union (ATU), Amman, 1972 and ATU publications.

In the professional field, the following regional organizations are relevant for the ECWA intraregional policy issues, particularly as regards travel trade and hotels: Civil Aviation Council of Arab States (CACAS); Federation of Arab Travel Agents Associations (FATAA); Arab Hotels Association (AHA); Arab Air Carriers Organization (AACO), and Arab Union of Automobile Clubs and Tourist Societies.

Another significant multinational activity at regional level, indirectly connected with tourism is carried out by the Gulf Air which includes Bahrain, Oman, Qatar and the United Arab Emirates. It is the joint air carrier of four ECWA member States, promoting air travel and tourism to this part of the region.

3.4.2.2 Bilateral

Tourism development policies conducted or/and co-ordinated at a bilateral basis consist of the tourism agreements concluded between ECWA countries. These agreements are relevant instruments of the tourism policy, covering essentially tourism promotion aspects confined to some contracting countries in the region.

The following are the bilateral tourism agreements concluded between ECWA countries:[1/]

1) Tourism co-operation agreement between Egypt and Lebanon; date of signature: 18 June 1953, Effective date: 18 June 1953, Duration: open-ended. Purpose and salient features: General provisions for the promotion of tourism between the two countries.

2) Tourism co-operation agreement between Egypt and Lebanon; date of signature: 24 May 1959, Effective date: 24 May 1959; Duration: One year; Purpose and salient features: Provisions to promote and encourage tourism between the two countries. The agreement was extended until 1962.

1/ UN-ECWA: "Evolution of economic co-operation and integration in Western Asia", in "Studies of development problems in countries of Western Asia", 1980, p. 25 and Annex II, Beirut 1981.

3) Agreement on trade, payments and tourism signed between Egypt and Lebanon on 20 October 1965. Effective date: 14 February 1966. Duration: One year. This agreement replaced the tourism agreement of 24 May 1959, aiming at closer co-operation *inter alia* in the field of tourism.

4) Tourism co-operation agreement between Egypt and Lebanon. Date of signature: 26 October 1968; Effective date: 3 February 1971; Duration: five years. The agreements included measure for promoting tourism and established a joint committee for follow-up.

5) Tourism co-operation agreement signed on 1 March 1975 between Egypt and Jordan, with effective date 1 March 1975 and open-ended duration. It comprises measures for executing a full comprehensive programme for promoting tourism.

To the above mentioned agreements, the bilateral tourism co-ordination and co-operation actions undertaken by the PDRY and the YAR should be added. In fact, the two Yemens are following an integrated approach in the field of tourism development and promotion under the auspices of the "Yemen Tourism Corporation".[1/]

The present number and status of the bilateral tourism agreements concluded by ECWA member States are rather limited and they have so far included only three ECWA countries out of thirteen, namely Egypt, Jordan and Lebanon.

Presumably, the countries in the region prefer to co-ordinate their efforts in the field of tourism development and promotion through the regional or/and international organizations such as, the Arab Tourism Union (ATU), United Nations system or international tourism, hotel and travel associations (See part 3.4.3 of this report).

1/ See: ECWA - Development Planning Division and Focal point for LDCs: "A programme of action in favour of the least developed countries in the ECWA region"; Memo dated 1 December 1982.

3.4.2.3 Joint financial institutions and ventures

This field covers a number of joint ventures which were set up in recent years with the explicit aim of constructing hotels and other tourist facilities. This phenomenon was greatly enhanced by the oil boom in 1973 and the desire of some Arab Governments to develop on adequate supporting services sector, including the provision of hotel accommodations and related facilities.[1/]

One of the initial joint ventures was the creation of the "Touristic Investments Limited Company" in 1973 in Manama/Bahrain, owned by the Kuwaiti Investment Company and other Bahraini private investors. Later on and between 1973 and 1975 some other joint ventures having private/public ownership were established such as: The Arab International Company for Tourism and Hotellerie, the Arab Investment Company for Reconstruction, the Arab Company for Investment and Growth, the Gulf-Egyptian Company for Tourism and Hotellerie, the I International Company for Real Estate and the United Hotels Company[2/]. One of the last joint tourism financial institutions established in 1981 has been the Arab Tourism Investment Company in Amman.

Other major financial schemes and regional institutions such as, Arab Funds and Banks, Islamic Development Bank, the Gulf Co-operation Council (GCC), Gulf Investment Corporation (GIC), an Arab investment companies are not fully involved in tourism sector and their action has not yet included specific tourism development schemes.

1/ See UN-ECWA: "Evolution of economic co-operation and integration in Western Asia", ibid, p. 50-51.

2/ UN-ECWA: "Evolution of economic co-operation and integration in Western Asia", ibid, p. 51.

3.4.3 International

All the countries in the ECWA region are members of the United Nations system, including its specialized agencies such as, International Civil Aviation Organization (ICAO), International Labour Organization, (ILO), UNESCO, World Bank Group etc. They co-operate among themselves through these international organizations and co-ordinate their tourism policies or related issues. Some of the ECWA countries have also United Nations or UNDP assisted or trust funded technical co-operation projects in the field of tourism carried out by executive-specialized United Nations agencies.

Furthermore, countries in Western Asia, as member States of the World Tourism Organization (WTO) are co-ordinating their tourism policies in various fields within the work programme of this intergovernmental body. They also receive from the WTO assistance and advice according to their priorities and requirements.

Some of the ECWA member countries are also actively participating in the activities and work indirectly including tourism issues of the international associations and non-governmental organizations such as: International Hotel Association (IHA), International Air Transport Association (IATA), Universal Federation of Travel Agents' Association (UFTAA), World Association of Travel Agencies (WATA), International Automobile Federation (IAF) and International Alliance for Tourism (IAT).

The participation of ECWA countries in the work of the above listed organizations cover main international issues concerning tourism policy co-ordination among the transport, hotel and travel sectors.

3.5 Air travel

While examining the present state of the tourism development in the ECWA region, special consideration must be given to the air transport, because of its presnet magnitude and its growing importance for the future development of international tourism flows to the area.

Air traffic between tourism-generating (tourist orginating) and tourist - receiving (tourist destination) countries can be carried out in one of four ways: 1/

1) by the scheduled airline of the tourist-originating country,
2) by the scheduled airline of the tourist-receiving country,
3) by the scheduled airline of a third country with traffic rights between the originating and receiving countries,
4) by a charter airline.

Every country in the region and in case of Bahrain, Oman, Qatar and the UAE, four Gulf countries together, have their own national flag-carrying airline, member of the International Air Transport Association (IATA); only Democratic Yemen Air is not IATA member.

The established international system requires airlines to apply for traffic rights, but once these have been granted on a particular route each airline operates independently of outside control. All scheduled airlines have sales offices and undertake promotion in countries to and from which they have traffic rights. Indeed, even if an airline has no traffic rights to a particular country, it will usually retain either a manager or a sales agent

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1/ International Union of Official Travel Organizations (IUOTO): "Impact of international tourism on the economic development of the developing countries", Geneva 1975, p:43-44.

(normally another scheduled airline which does have traffic rights to and from the country in question) in order to handle queries and bookings on routes which cannot with services from the country in question and for which the airline does have traffic rights.

As regards charter flights, there are three types of charter business:

(a) Single entity - i.e. the capacity of an entire plane is purchased on one-off ad hoc basis

(b) Affinity group - i.e. an organization contracts for the plane with costs prorated among the members taking the trip, membership of the group having to predate the journey by at least six months. During 1973, agreement was reached on the introduction of advanced booking charters (ABC) in Europe and of travel group charters (TGC) in the United States which allow a travel organizer to sell seats to the public at least 60 days (originally 90 days) prior to departure.

(c) Inclusive tours - i.e. tour operators contracting for seats, then selling package tours to individual members of the public.

There are three main types of charter airlines: subsidiaries of national scheduled airlines; subsidiaries of tour operators; and independent airlines. There is no clear division between which type of charter airline carries which type of charter traffic. Both independent airlines and scheduled airlines' subsidiaries fly single entity, affinity group, and inclusive tour charters. Charter airline subsidiaries of tour operators are, however, used exlusively for inclusive tour traffic.

The great majority of charter airlines are from the developed areas of the world. Most developed countries' scheduled airlines have a charter subsidiary. All independent charter airline companies are owned in, and operate from, developed countries. The only instances where charter airlines are established in developing countries are where the scheduled airline of a developing country has a charter subsidiary. There is a number of such examples, even if, in some of these cases, the charter subsidiary has not begun operations as yet. In practice, therefore, the great bulk of charter traffic between developed and developing countries is carried by airlines of developed countries.

For the time being there is not large charter traffic to and within the ECWA region and various types of charter business has not yet been fully developed by the airlines of the countries examined in this report.

The illustrate the size and volume of the most important travel mode to the study area, the statistical data of passengers carried by the airlines in the ECWA region have been compiled in Table 3.10. The information exposed for the year 1981 comprises for each airline, international and domestic flights, passenger volume, the load factor and the operating fleet. 1/

The lack of charter flights business constitutes a major problem for the steady development of a flourishing tourism flow to the area. In fact the international non-scheduled by the national airlines are only available for holiday tourism in Egypt, Jordan and Syria and for religious tourism in Saudi Arabia (Table 3.10).

A closer examination of the airlines operations in the study area also suggests that air connections through the schedule services, covering all the major centres of the ECWA region are provided (See Table 3.11).

1/ It is also worth mentioning that there is a large intra-regional air traffic due to labour mobility especially between Egypt, as the main manpower exporting country, and the other ECWA member states, as immigration countries. The bulk of these travelling workers and their families is carried by the national airlines of the ECWA region.

Table : 3.10

Air transport statistics regarding the airlines in the ECWA region (1981)

Country / Airline	Passengers carried	Passenger-Km flown (in thousands)	Seat Km available (in thousands)	Passenger load factor %	Operating fleet
Egypt/Egyptair					
International Scheduled	1,384,103	2,895,852	5,261,919	55.0	
Domestic scheduled	845,000	368,822	536,212	68.8	17 Boeing
Total	2,229,103	3,264,674	5,798,131	56.3	5 Airbus
International non-scheduled	..	292,202	..	..	1 Fokker
Domestic non-scheduled	..	26,265	..	..	
Gulf States/Gulf Air 1/					
International Scheduled	1,498,112	1,937,743	3,630,802	53	..
Iraq/ Iraqi Airways					
International Scheduled	456,993	1,288,558	1,969,024	65.4	
Domestic Scheduled	..	..	..	..	13 Boeing
Total	456,993	1,288,558	1,969,024	65.4	
International non-scheduled	..	34,509	..	..	
Jordan/Alia Royal Jordanian					
International Scheduled	1,384,766	3,154,201	5,116,430	61.6	
Domestic Scheduled	58,515	16,716	32,588	51.3	16 Boeing
Total	1,443,281	3,170,917	5,149,018	61.6	2 Lockheed
International non-scheduled	..	60,204	..	..	
Domestic non-scheduled	..	256	..	..	

Table : 3.10 (Cont'd)

Country / Airline	Passengers carried	Passenger-Km flown (in thousands)	Seat Km available (in thousands)	Passenger load factor %	Operating fleet
Kuwait/Kuwait Airways					
International scheduled	1,252,477	2,880,341	4,846,841	59.4	14 Boeing
International non-scheduled	..	14,935	..	..	
Lebanon/Middle East Airlines					
International scheduled	843,561	1,437,805	2,525,031	56.9	21 Boeing
International non-scheduled	..	94,995	..	..	
Saudi Arabia/Saudi Arabian Airlines					30 Boeing
International scheduled	2,325,639	5,718,268	10,115,962	56.5	17 Lockheed
Domestic scheduled	6,821,038	4,789,969	8,084,125	59.2	
Total	9,146,677	10,508,237	18,200,087	57.7	7 TWA
International non-scheduled	..	299,221	..	..	2 Beech-craft
Domestic non-scheduled	..	28,999	..	..	1 Cessna
Syria/Syrian Arab Airlines					
International scheduled	446,356	1,007,408	1,752,217	57.5	5 Boeing
Domestic Scheduled	69,177	27,780	36,915	75.3	3 Caravelle
Total	515,533	1,035,188	1,789,132	57.9	2 Yakovlev
International non-scheduled	..	27,047	..	..	
YAR/ Yemen Airways 2/					
International scheduled	262,756	236,913	653,641	36	..

Notes: 1/ Bahrain, Oman, Qatar and UAE. Data cover 1978.
2/ in 1976
3/ Information on Democratic Yemen Air is not available.

Sources: - International Civil Aviation Organization (ICAO), Digest of Statistics No. 270, Traffic Commercial air carriers, 1976-1980, Montreal 1981.
- International Air Transport Association (IATA), World Air Transport Statistics, No. 26, Geneva 1982.

Table : 3.11 Flight frequencies between major cities in the ECWA region. (Total number of weekly flights as per December 1982)

From \ to	Abu-Dhabi	Aden	Amman	Baghdad	Bahrain	Beirut	Cairo	Damascus	Dhahran	Doha	Dubai	Jeddah	Kuwait	Muscat	Riyadh	Sanaa	Comments
Abu-Dhabi		1	17	N	42	10	38	5	26	26	N	17	23	16	20	1	
Aden	1		N	N	1	2	N	1	N	N	N	7	4	N	N	3	1. The best air-connected cities are located in Gulf Countries and in Saudi Arabia.
Amman	18	N		20	8	17	56	3	9	7	19	9	14	8	3	N	
Baghdad	N	N	20		N	2	19	N	N	N	N	1	7	N	N	N	
Bahrain	42	N	11	N		14	25	4	49	44	42	42	18	29	49	2	
Beirut	10	2	17	5	12		15	N	9	11	10	13	23	4	3	N	
Cairo	30	N	56	31	20	14		6	14	20	32	43	29	17	35	8	2. Aden, Baghdad and Sana'a are the main cities which are not well connected to the other major centres in the ECWA region
Damascus	7	2	3	N	6	N	5		6	1	7	12	13	2	3	2	
Dhahran	32	N	9	N	49	8	20	2		49	28	44	15	18	96	2	
Doha	27	5	7	N	34	14	18	2	26		22	9	17	17	18	2	
Dubai	1	N	19	N	39	10	40	6	31	16		13	25	19	30	2	
Jeddah	30	5	9	1	44	11	43	10	48	32	21		13	9	115	12	
Kuwait	22	3	14	7	24	23	29	13	21	18	29	13		7	17	2	
Muscat	18	N	18	N	34	2	23	N	15	16	15	5	6		11	4	
Riyadh	24	1	3	N	50	3	34	3	107	20	7	102	13	13		6	
Sanaa	1	4	N	N	2	N	5	2	2	1	3	13	2	1	9		

Note : N = no connection

Sources: Compiled by ECWA/TCTD on the basis of ABC World Airways Guide and airline timetables

As regards specific problems in the field of air travel within the ECWA region the following bottlenecks are the most important:

(1) The airlines of the region generally have large number of flight destinations, not necessarly commensurate with their fleet. Some of the "prestige destinations" are neither economically nor technically justifiable with the available aircraft and management capacity,

(2) In many ECWA countries, inefficient booking systems operated by the national airline companies are leading to overbookings.

(3) Many delays are occuring, principally due to inappropriate operations - planning, inefficient booking - and seat - reservation - systems as well as because of inadequate aircraft handling (technical and catering - wise) and as a result of complicated customs and visa regulations/formalities at the airports.

Another problem which may arise in the future concerns the optimum balance to be found between the air transport capacity (seats available) and the accommodation facilities (number of available beds) in various ECWA countries. This issue can only be resolved by appropriate planning and through imaginative promotion and marketing.

3.6. Summary of principal aspects of tourism development in the ECWA region.

In order to show a comparative picture of tourist density which may help to summarize the principal aspects of the present state of tourism development in the region, some indicators are given on Table 3.12. According to this table, prepared on the basis of available data and information, the countries with smaller size of area and population have higher density than the larger and more populated countries. The figures concerning foreign tourist numbers per 1,000 inhabitants and per km^2, as well as international tourist receipts

Table 3.12 Tourist density in the ECWA region (average 1980-1981)

Indicator \ Country	Bahrain	Egypt	Iraq	Jordan	Kuwait	Lebanon	Oman
Population (in 1,000)	344	40,085	13,025	2,202	1,374	2,452	984
Area (in 1,000 km^2)	1	1,001	435	98	18	10	300
Nights spent by foreign tourists	496,637	9,805,715	13,532,689	..	374,990	595,019	262,203
Intern. tourism receipts (mil. $)	..	375	170	504	452	65	..
Intern. tourism expenditure (mil.$)	131	630	..	339	1,123	..	..
Accommodation capacity (beds)	5,710	57,202	77,434	30,000	4,249	6,685	1,309
Foreign tourist nights per 1,000 inhabitants	1,400	245	1,040	..	273	245	266
Foreign tourist nights per km^2	497	9	31	..	21	60	1
Intern. tourism receipts per tourist night ($)	..	38	13	..	1,205	108	..
Intern. tourism receipts per inhabitant ($)	..	9	13	230	323	26	..
Intern. tourist expenditure per inhabitant ($)	380	16	..	150	817	..	..
Accommodation capacity per 1,000 inhabitants (beds)	17	1.4	6	14	3	3	1.3

Cont'd/...

Table 3.12 (Cont'd)

Indicator \ Country	PDRY	Qatar	S.Arabia	Syria	UAE	YAR
Population (in 1,000)	1,900	243	9,229	8,979	983	5,225
Area (in 1,000 km^2)	333	11	2,150	185	84	195
Nights spent by foreign tourists	79,000	420,158	..	1,593,330	..	392,830
Intern. tourism receipts (mil. $)	4	..	1,573	175	..	34
Intern. tourism expenditure (mil.$)	10	..	2,761	241	..	44
Accommodation capacity (beds)	1,171	1,836	45,000	21,661	20,000	8,307
Foreign tourist nights per 1,000 inhabitants	42	1,729	..	178	..	75
Foreign tourist nights per km^2	0.3	38	..	9	..	2
Intern. tourism receipts per tourist night ($)	51	..	..	109	..	86
Intern. tourism receipts per inhabitant ($)	2	..	171	20	..	7
Intern. tourism expenditure per inhabitant ($)	5	..	299	27	..	8.5
Accommodation capacity per 1,000 inhabitants (beds)	0.6	8	5	2.5	20	1.6

(..) Not available

Source: Compiled and calculated by ECWA/TCTD on the basis of the previous tables.

and expenditure per inhabitant, illustrate relatively high density-degrees in the countries of the southern part of the study area. The high concentration of accommodation capacity air the Emirates, Bahrain, Jordan and Qatar is proven by the figures related to the number of beds per 1,000 inhabitants. Kuwait, Jordan and Saudi Arabia have the largest tourism receipts per inhabitant. Tourism expenditure per capita is highest in Kuwait, Bahrain and Saudi Arabia. The lowest tourism income per km^2 and per capita is registered in PDRY, Oman and YAR.

However in comparison with other tourist receiving countries in Europe or in Maghreb, these indicators point out much lower density-grades. 1/

Besides the tourist density, some main aspects of the tourism supply and demand structure as well as some of the major tourism development policies in the countries covered by this study, may contribute to summarize the principal aspects of the present tourism development in the ECWA region. 2/

Supply

Aspects	Features and policies
1. Tourism potential : (resources and attractions)	- mainly historical and socio-cultural, religious but also climatic, natural and seaside resorts, lakes and hills. - need for assessment, classification and protection. - comprehensive inventory of all resources needed. - opening of new resort areas and measures for renovating historical and archeological sites.

1/ See: Organization for Economic Co-operation and Development (OECD): "Tourism policy and International Tourism in OECD member countries", Paris 1980, 1981 and 1982 Annual reports.

2/ United Nations, UNCTAD: "Elements of tourism policy in developing countries", New York 1973.

2. <u>Accommodation</u>	hotel capacity rose in all countries, predominance of luxury and high-class accommodation, hotel size generally increasing. - lack of planning and appropriate incentives for new investments and maintenance and improvement of the existing capacity. - lack of policy measures for supplementary accommodation. - incentives are not always clearly defined and applied according to category, region or locality. - danger of overcapacity in some countries, particularly in capital towns.
3. <u>Amenities</u> : (other tourist facilities, such as restaurants, entertainment etc.)	- generally not sufficiently developed and diversified for modern tourism. - absence of general incentive policy.
4. <u>Infrastructure</u> : (Water and energy supply, transport, communications, etc.)	- Basic tourist infrastructure behind demand and insufficient or inadequate. - lack of integrated planning, zoning and investment/project implementation - absence of concentration of specific infrastructure and improvement schemes.
5. <u>Labour supply</u> :	- shortage of skilled labour and managers. - increasing foreign manpower, predominant foreign management. - comprehensive vocational training programmes only in some countries

6. Regional distribution :
- concentration in cities or some resort areas.
- new policies for earmarking of new sites for tourist development.
- absence of differentiated regional policies and plans.

Demand

Aspects	Features and policies :
1. Visitors :	- mostly from other Arab countries : one single major market; high dependence on the Region. - absence of policies of diversification through appropriate promotion and marketing - lack of intraregional cooperation. - no accute seasonality problem for the international incoming tourism.
2. Mode of arrival :	- large share of air traffic and increasing importance of arrivals and trnsit by air. - limited measures for the improvement of tourist transport infrastructure. - absence of policy measures towards scheduled, promotional and charter flights.
3. Various types of tourism :	- lack of policy coordination at regional or sub-regional level for package (inclusive) tours and marketing. - absence of coordination between the supply and demand policies according to specific tourist types and tourism circuits.

- insufficient measures for the promotion and development of recreational activities.
- no specific and farreaching measures for the promotion of domestic and social tourism.
- major problems regarding frontier formalities and facilities.

4. PROBLEM AREAS

One of the first aims of a new tourism development strategy in the ECWA region would be to resolve the main tourism problems and to eliminate major short-comings, obstacles and difficulties hindering the steady and balanced expansion of tourism within and to the region.

The problems to be tackled by a well defined tourism development streategy, including realistic objectives, targets and policies are however closely linked to the political situation and stability in the Middle East. The development of tourism based on a sound utilization of the very rich tourist potential in the ECWA region will entirely depend on short and medium term political patterns in Western Asia.

Indeed, the long and unfortunate past history as well as the present turmoil and the "alarming succession of crises" in the Middle East, is currently impeding and likely to continue to impede international and intraregional tourism development in the study area. All ECWA countries are affected by the general confused political and military situation prevailing in the region and cannot even envisage to undertake the most modest measures aiming at intraregional tourism co-operation.

The restoration pf peaceful conditions, which would contribute to the renewal of the confidence of tourists and travellers, is the main prerequisite for resolving the various problems in specific fields of tourism development.

The problem areas examined hereunder are not only structural, but also the result of combined circumstances originating from socioeconomic, political, historical and cultural background of the region. They are related to various fiellds of the contemporary and future utilisation of the tourism potential in the ECWA region.

Furthermore, although discussed under separate headings, these problems are closely linked to each other. They should be eliminated through appropriate actions covering common features of all the difficulties and constraints as well as considering the multidimensional impact of the tourism sector.

The tourism problems of Western Asia can only be tackled by formulating and implementing a new regional tourism strategy which will take into account the specific needs and particular realities of the region.

4.1. Availability of resources

The first and basic problem area concerns the availability of resources on which tourism development strategy should be based. The countries in the ECWA region have considerably greater variability in resource endowments. This implies that special emphasis should be given to various exploitable resources and to their specific availability and utilization.

The problems connected with tourist resources can be examined under three main headings: 1) Land and other natural resources, 2) manpower, and 3) financial resources.

4.1.1. Land and other natural resources

The ECWA region possesses various of land and other natural resources which are *per se* the most important tourist assets and fundamental tourist attractions. They are however not fully assessed, and their prioritary utilization according to tourism planning findings and choices as well as to various tourist markets and types are not well defined.

The countries in the region have not yet undertaken any cost-benefit oriented approach towards tourism development, whose first concern would be the survey and assessment of natural resources. Furthermore, the classification of the resources should give sufficient attention to the question of physical (land-use) planning, by which the use of land for tourism and other purposes could be harmonized. Adequate abalysis and planning of natural resources would also lead to abetter balanced and controlled tourism development whereby any possible disfigurement of the landscape and environmental damage could be avoided.

Within the framework of land-use programmes foreseen in the ECWA region sufficient attention was not often given to tourism issues. Land-reclamation and water-use schemes, forest development projects, combat of desertification could easily include tourism development projects. Furthermore, specific landscape features such as deserts, dunes, hills or lake and river coasts, beaches, steppes and rift valleys, otherwise not fully exploitable could be of value for combined-multicentre touring.

In various zones of the region, the absence of tourism planning or its inefficient implementation often causes land speculation and land scarcity; it also leads to a general lack of basic infrastructure, unplanned settlements and low quality tourist facilities.

In countries where an applicable legislation regarding the equitable expropriation or the use of the land for public utility purposes exists, the natural resources are better protected and their optimum use is better secured.

4.1.2. Manpower

The statistical data on labour sector suggest that there should be enough manpower available for tourism sector activities in the ECWA region. However, this general statement is not necessarily valid for individual countries. Due to the lack of interest and willingness to work in hotel and tourism occupations, many countries of the study area are using "imported manpower". In the Gulf area and in the northern sub-region, there has been a rapid growth in the number of foreign workers in upper-class accommodation industry.

In many countries, the training courses conducted before or during operation, by some of the international hotel chains (in house or on the job training) do not often cover the appropriate needs of national manpower policy and may also lead to a later "expatriation" through the same foreign companies.

There is an urgent need for a co-ordinated effort in the recruitment and training of tourism personnel, especially with view to attracting young people and female employees to the hotel and tourism professions.

Another major problem concerning the manpower resources is the lack of surveys as regards the future needs of qualified workers in the tourism sector. Although some governments in the region are being increasingly involved in systematic training programmes at basic, middle, higher and management levels for hotels and tourism industries, the needs of each sub-sector and field of activity have not yet been clearly defined and assessed.

The co-ordination of the tourism manpower issues among various public authorities and private organizations such as the ministries of tourism, education, social welfare, culture and labour as well as central (national) planning or development organizations, trade unions, hotel and travel trade associations, etc. also constitutes another basic problem.

4.1.3. Financial

The most important facts of the problems connected with financing of the tourism development are the insufficient interest of private sector towards tourism investment and the public sector's involvement in tourism financing.

In some countries of the study area there is a complete lack of legislation designed for the encouragement and guidance of private sector's tourism investments. The present tendency and availability of private capital for hotel construction schemes should be framed and organized by specific financial rules and regulations according to the priorities and requirements of the national tourism development strategy.

Financial resources provided by the public sector should cover, subject to closer examination and assessment, the following public expenditure groups:

"(a) Development expenditure on research, planning, publicity, training and supervision of the industry;

(b) Infrastructural costs, including utilities;

(c) Direct involvement in running tourism facilities, including airlines, etc;

(d) Incentives and aid to different sectors of the industry; and

(e) Expenditure arising from the indirect effects of tourism expansion".[1]

In the study area, in many cases the internal or regional financial resources through the regular government budget or through the Arab Funds are directed towards tourism investments, particularly hotels. However, priority areas and zones, types of investments and location-choice and other particularities are not always handled according to appropriate project preparation and evaluation process. Furthermore, regional financial resources do not fully consider development potentialities and needs, and their financing schemes are not always fully aware of the tourism sector's requirements or possibilities.

Finally, there is no special emphasis given to those relatively "active" financial and fiscal measures and instruments which can take advantage of complementarity in financial resource endowments by combining the surplus capital of the oil-exporting with the surplus labour of non-oil exporting countries in the ECWA region.

4.2. Policy and decision - making process

Under this heading the following points are discussed:

a) Tourism legislation, as the basis of policy making process,

b) Organization of tourism activities in public and private sectors as the organic component of the process, and c) Co-ordination linkages among various policy and decision making centres.

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[1] IUOTO : "Impact of international tourism on the economy of the developing countries", ibid, P.27.

4.2.1. Tourism legislation

Problems associated with the tourism legislation in the countries of the ECWA region are manifold: in some cases there is a total absence of enacted laws, administrative rules or regulations dealing specifically with tourism issues. In other cases the existing so-called "tourist laws" do not include all the basic components of the legal frame.

The policy making and decision taking process should be able to tackle various tourism development issues on the basis of appropriate legislative authority and by implementing already established practices derived from laws, rules and regulations.

Basically tourism legislation should cover; organizational set-up of public and private tourism sector; incentives, inducements and other specific measures for tourism development; manpower training schemes national, regional and local planning; land-use, public utility and zoning regulations; protection of historical, archeological heritage and natural sites; wild-life; landscape and environmental issues connected with tourism development; regulations concerning facilitating frontier formalities for incoming and outgoing tourism; measures on social tourism, youth tourism, workers tourism and recreation; protection of the tourist as a consumer; staggering of holidays; public finance and fiscal measures for tourism.

4.2.2. Organization of the tourism sector

Because of the lack of legislative authority in some countries of the study area, the respective roles of the private and public sectors are not clearly determined. The organizations already in existance are not efficient and political or individual influences are prevailing. The distribution of tasks, competences and responsibilities among the various government agencies and public authorities concerned are not always appropriate, and sometimes conflicting cases are arising.

In organizing their tourism sector, governments of the region should concentrate on viewing the existing and future demand and supply structures of their tourist industry and create appropriate organizational set up. Current trends suggest that, for most countries, the most beneficial way seems to be the creation of a strong efficient public tourism authority which, in close co-operation with national planning bodies, would guide the private sector's tourism activities.

Furthermore, the central (national) tourism organization should be able to "defend" the priorities and interests of the tourist sector, thus enabling the inclusion of the tourism issues into the national development process. The decision making channels at various levels (national, regional, local) in the tourism sphere should follow a clear-out strategy designed by the central authority and shape it according to regional and local realities and requirements.

This new approach would necessitate, among others, the existance of qualified administrators, experts and planners in government's tourism organizations thus enabling and efficient public management scheme for the tourist sector.

4.2.3. Co-ordination

Measures undertaken within the framework of policy and decision making process need close co-ordination in two ways: a) between the public and private sector tourism organizations (horizontal co-ordination); and b) among various levels of implementation: national, regional and local (vertical co-ordination).

The policy-making process and priority-setting system can only be operational if and when the necessary coordination is established at all levels and in all sub-sectors, connecting decision-making centres firstly among themselves and secondly with the implementing, executive agencies and private sector enterprises.

Furthermore and besides the above indicated co-ordination at national (country) level, the intraregional and international tourism co-ordination should be strengthened. The attemps already made in this direction, examined in part 3.4.2 and 3.4.3 of this report, have sofar attained limited results. Closer tourism strategy and policy co-ordination among the ECWA member countries, at regional and international levels, would enhance their position in the world tourism. Furthermore and at sub-regional level, the Gulf Cooperation Council (GCC) which is becoming very active in various socio-economic fields, besides its political aims, could also play a growing role in tourism. Recently GCC member states (Bahrain, Kuwait, Qatar, Saudi Arabia and the UAE) have agreed to establish the Gulf Investment Cooperation (GIC) which may, among others, consider joint tourism projects.

4.3. Tourism planning

4.3.1. National development planning and tourism

The available information suggests that in most countries of the ECWA region relations between the tourism sector and other primary, secondary and tertiary economic and social sectors are not examined in details and an appropriate input-output table including tourism sector's transactions is not prepared.

This problem of sectoral integration in the field of tourism is, above all a national planning issue and can be solved by introducing tourism matters into all stages of the national development policy-or planning-exercise.

The macro planning problems are further reflected at micro-stage, specifically at project-level. The sectoral integration has also to be considered from the very beginning till the completion of any tourism investment scheme. This integrated approach requires a multidisciplinary team of experts dealing with the preparation and implementation of the large tourism projects.

Various tourism master plans or development programmes as well as important investment schemes existing in the countries of the study area do not always include sector based integration approach. Furthermore, they are not prepared in close relationship with the national development or tourism plan or programme. In many cases the absence of links between unrealistic tourism master plans and the national development plan is very obvious; for example, sometimes both the accommodation capacity foreseen and the tourist number-forecast made in a local tourism land-use plan are larger than the tourism targets of the national development plan.

In addition, macro cost-benefit analysis using financial, economic, social and environmental approaches is not yet fully introduced into the national tourism planning exercise undertaken by ECWA countries. In cases where the cost-benefit analysis may face greater difficulties of preparation, the so-called "use-value- analysis" can also be applied.[1]

4.3.2. Physical planning.

4.3.2.1. Zoning and location choice.

In the ECWA region the absence of a comprehensive tourism land-use plan is apparent and problems of integration in space deriving therefrom are mainly due to the lack of physical (land-use) planning.

1/ International Association of Scientific Tourism Experts (AIEST - IATS); "Interrelation between benefits and costs of tourist resources", 1982. See also; the "Selected bibliography on tourism development planning" prepared by the ECWA - Transport, Communications and Tourism Division, and circulated to the National Tourism Organizations of ECWA member countries in April 1982. This list may be helpful for the efforts deployed, by ECWA countries in the field of tourism planning.

The partial master plans or regional development plans as well as local land-use or urban plans are covering only some of the tourism development aspects. The overall links with multisectoral land-use policy and relationship with the national socio-economic development strategy are not fully considered.

In the study area, the natural conditions and planning problems are almost identical among countries especially in the northern sub-region and in the Arabian peninsula and therefore a common denominator might be easy to find. A joint approach to the physical planning problems would be the first step to undertake.

The problem of formulating zoning regulations, norms of carrying capacity (physical, social and cultural) which would be valid for use in tourism planning must also be considered. Efforts to this direction, with some exceptions, have not yet been made by all countries of the region.

There are also various environmental issues which could obstruct further development of tourism (air, water, noise and visual pollution) whose control is becoming very urgent in some zones, such as in the Mediterranean costs of Lebanon, Egypt and Syria, and in the Gulf.

Furthermore, the problem of balance and of alternative uses are also particularly acute in some localities in Egypt, Jordan, Lebanon, Syria and in Gulf countries, where the land area available for tourism and recreation development (especially coastal zones) could also be utilised for other land-use modes.

Another problem in the field of spatial integration concerns the co-ordination among the local authorities, public entities, private land owners and private investors. Experience in many countries regarding urban agglomerations as well as coastal strips and other space suggests that there is no easily applicable and universal solution to this problem. However, physical planning, with its various techniques and implementation possibilities, and an appropriate legislation could provide valuable solutions in the region.

In the ECWA region, the tourism location choice is guided by two forces; (a) existing traditional, historical, natural, archeological sites and urban centres, (b) new tourist development schemes and settlements. Besides, the assessment of tourist attractions and resources, the priorities of national tourism strategy, the national, regional and local resources allocation system within the frame-work of socio-economic and physical tourism planning should play a decisive role.

The above mentioned approach is, however, not always followed by the countries in the study area and large political, financial or local interests often affect location choices and types of tourist investment.

Furthermore, and in a broader sense, the tourist development takes place in two kinds of location: (a) spots where tourists are staying at least one night (staying places or overnight localities), and (b) transit places, where visitors do not stay overnight.

In the study area some tourist spots, in particular business centres and capital towns, have been wrongly evaluated and planned. This situation obviously leads to over-capacity and in the long-run, investments made can hardly assure an optimum rate of return.

Within the framework of location-choice, the most important problems to consider are the linkages among tourist (holiday, religious, business tourism) localities, infrastructure and tour-itineraries (circuits) on one hand and between tour-itineraries and marketing programmes on the other.

4.3.2.2. Tour itineraries

The marketable tour-itineraries must follow the pattern of optimum tourist locations. In other words, new tourism and accommodation development or settlement schemes must be planned according to optimum "marketable" tour-itineraries.

In the study area there are several "feasible" tour itineraries as indicated in Map II. These circuits are connecting various tourist zones in the region which were discussed previously and shown on Map I.

Besides these principal tour-itineraries, Map II also illustrates the over-night localities which are the starting and ending points of the tours. On the same map, the transmit tourism places and the main entry points to the region are also indicated. For the present tour-itineraries and their development and promotion in the foreseeable future, these circuits could be considered as a frame.

The main concern guiding the preparation of this map has been to underline the most important tour-possibilities in the region allowing for the development and promotion of an intraregional "multi-centre tourism concept". Indeed, existing or proposed tour-itineraries, as shown on Map II, are linking various holiday, commercial-business, religious, historical-archeological or cultural centres of the ECWA region as a whole.

It should be noted that various tourism planning techniques and their use in the region have into consideration not only the socio-economic and land-use priorities but also the particularities concerning the zoning and location choice as well as the main marketable multi-centre tourism itineraries.

4.4. Marketing.

The marketing sphere is one of the most important problem area regarding the formulation and implementation of the tourism development strategy in the ECWA region. It includes marketing links, market mechanisms and marketing strategy.

4.4.1. Marketing links between tourism zones and markets.

In the study area the urgent need for marketing studies, the lack of a common regional or sub-regional marketing strategy; and the absence of specific marketing efforts for important tourist zones and localities are strongly felt.

The necessary distinction between the primary and secondary markets of the ECWA region as well as between the competing and complementary markets has not yet received appropriate consideration. The most important visitor generating market to the ECWA region is the Arab Middle East (Arab tourists and expatriates living in the region) consisting mainly of buisness, religious and family travels. The primary tourist generating market is Western Europe. The secondary potential markets are South-Eastern Europe; Arab Maghreb and Northern America (for business and vacation).

The above mentioned market-segments are not carefully surveyed and various promotional efforts by the national tourism organizations in the study area are not focused according to the particular potentiality of each market. In many cases tourism propaganda-and information measures follow only basic tourism publicity methods, without any connection with the marketing-mix (combination of sales promotion, market and marketing studies, distribution channels, propaganda, information and publicity, etc...).

The ECWA region possessing the same culture, civilisation and language, having similar tourist attractions and catering to identical tourist generating markets should be able to plan and to conduct a joint marketing campaign.

The selection, co-ordination and concentration are the key items of such a campaign. In fact, co-ordinated and common marketing programmes should only be concentrated on few selected potential markets. The international tourist receiving markets in the world are highly competitive and the main tourist destinations try to attract similar travellers. Therefore, joining the concentrated efforts becomes a major obligation.

As indicated in Table 4.1, the principal tourist zones of the ECWA region can be combined in some groups, representing compact tourist supply structures, capable of attracting visitors from given tourist generating markets at international, regional or local levels. Out of eight combined tourist receiving zones in the study area five could easily be marketed for the domestic (internal) tourism. Six combined zones represent the most important supply areas for the intra-regional (ECWA) market, and for the international markets four combined zones are relevant.

The main zones combining historical, archeological sites; sun and sea resorts and rivers and lakes could easily attract all of the three tourist generating markets. Capital towns, mountain and hill resorts, and steppes, deserts, wildlife areas, if combined through appropriate tour-itineraries and marketing channels, could respond to the demand emanating from domestic, regional and international markets. (see Table 4.1.). The other zonal combination possibilities may concern one or two generating markets.

The combinations illustrated in Table 4.1 are the bases for a multi-centre tourism in the ECWA-region, to be covered by the major tour-itineraries fully integrated into the spatial and socio-economic texture of the region. (see Map I and II).

4.4.2. <u>Market mechanism and marketing strategy.</u>

Marketing of tourist zones and areas is only possible if they are offered by the accommodation and travel trade sectors as tourist products.[1] The most important components of the tourist market mechanism are: the accommodation sector, the travel trade industry and the airlines sector.

As regards the ECWA region, the accommodation sector is mainly, if not only the hotel sector. The travel trade industry of the region, which is not yet fully developed, concerns the transnational tour operations and the airlines, active at national or regional levels.

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[1] <u>For example</u>: Pilgrimage tours, river cruise, package tours, resort holiday in a health centre, land excursions, desert safari trips.

Table 4.1

Major inter-zone combination
for marketing

Combined zones 1/	Domestic (internal) market	Intra-regional market (ECWA)	International markets
1 + 2 + 3	X	X	X
1 + 4 + 5		X	
1 + 5			X
1 + 2 + 6	X	X	
1 + 5 + 7			X
3 + 6 + 8	X	X	
5 + 6 + 7	X	X	X
1 + 4	X	X	

Note: 1/ See Tables 2.1, 2.2, 2.3 and 2.4 as well as Part 2.8 and 2.9 of this report; and Maps I and II.

In the study-area, for the design and construction as well as for the operation of hotels, the involvement, hence the impact, of the transnational corporations are very important. In the tour-operations sector, the function of the foreign tour-operations as "brokers" in the marketing of tourist related services between customers from the tourist-generating countries and the producers of such services in the region is relevant for the holiday tourism in some countries (Egypt, Jordan, Syria and the Yemen Arab Republic) and for the pilgrimage (religious tourism).

The airlines sector, dominated by national and international regulations, is competing for the main international air routes to the area and has not yet developed charter flight business. There is however one single airline company covering four Gulf States which represents a good example of joint venture at regional level.

The marketing strategy to be designed and implemented by the countries of the study area should be based, as much as possible, on national marketing channels, and the participation and impact of the transnational corporations in hotel and travel trade should be carefully examined and supervised.[1/]

Another main issue in the regional marketing strategy is the joint marketing efforts which must take into consideration the competing and complementary tourist receiving markets within the study-area. For example: Baalbek, Palmyra and Petra; Aqaba and Lattakia or river and lake resorts in Egypt, Syria and Iraq are or may become competing markets which can only be complementary if and when they become part of a joint marketing-scheme within "marketable" tour-itineraries. Furthermore, the sea resorts of Egypt and the historical sites of the Nile Valley are complementary receiving zones; the coastal zones of South Yemen could be combined with health resorts of North Yemen; or the business tourism to the UAE or to Oman could also cover sea-side resorts (Sharjah, Khor Fakkan, Salalah).

1/ See: "Transnational Corporations in International Tourism", United Nations, New York 1982, pages 81-88.

To tackle the marketing problems arising from various aspects of the marketing strategy, the ECWA member countries should follow a joint marketing scheme including market surveys and studies, marketing-mix, promotional measures and should concentrate on viewing the structure of the international tourist markets and decide to what extend and how they wish to market their tourist development potentialities.

4.5. External tourism account (Balance of payments)

The countries in Western Asia have not yet produced a detailed analysis of their tourism external accounts 1/. Consequently it is rather difficult to examine the tourism problems related to external resource generation or utilization and their costs. The only source of information is statistics on international tourism receipts and expenditure in countries of the region. (See Tables 3.6 and 3.7).

1/ Such an account should include the following:
- "Foreign exchange earnings from visitors;
- other foreign-exchange contributions of tourism movements;
- the cost of importing goods and services used by visitors, including not only products wholly imported but also the import component of goods produced in the tourist-receiving country and of services used by tourists;
- foreign exchange costs of capital investment in tourist amenities, such as hotels, vehicles, equipment and infrastructure;
- payments abroad in the form of profits and capital taken out of the country by foreign concerns involved in the industry, plus interest payments of foreign loans, management royalty and other fees; remittances by foreign personnel employed in the industry; payments due to foreign travel agents, tour operators, etc;
- promotion and publicity expenditure abroad, usually by the national tourist organization of the tourist-receiving country;
- other direct foreign echange costs, including costs of training personnel abroad; and
- external expenditure on imports resulting from consumption by residents who have earned income from the tourist industry." and due to the "demonstration effect" of tourism. (Source: IUOTO: ibid, Geneva 1975, page:13)

On the basis of this data and as a general appreciation one can state that the problem of external dependence of tourism sector in the ECWA region is becoming more and more acute, due particularly to larger imports of goods and manpower. Furthermore, oil exporting countries have high travel propensity abroad and their international tourist expenditure are comparable to those of industrialized countries.

In addition to a complete assessment of resources-utilization and -transactions with the outside world, a policy of import substitution for tourism (including goods and services) seems to be essential for the countries in the ECWA region.

4.6 Other problem areas

There are other problems to be tackled within the framework of a new tourism development strategy in the ECWA region. They cover wide range of issues such as, surveying of tourism movements, policies and operations, prices goods and services, investment schemes, tourism management, etc. Their proper consideration and the implementation of specific policies in order to reduce their negative impact on tourism development in the region, are among the main tasks of the strategy to be adopted by ECWA member states.

4.6.1. Surveys and studies.

Problems pertaining to surveys and studies in the field of tourism can be summarized as follows:

In the ECWA region there is no special institution conducting regular basic or applied research in the field of tourism. The studies covering various aspects of tourism policy and planning, prepared or commissioned by the National Tourism Organizations are not comprehensive. There is an urgent need for survey and study, particularly concerning tourism resources and facilities, tourism marketing and promotion, monitoring and planning. Joint pilot research projects among the countries or multinational study groups which may later become regional tourist research centres could be considered as a preliminary step towards the solution of this problem.[1]

At a larger scale, the effective contribution of the countries in the region to research work carried out by regional (for example by the Arab Tourism Union) or international (UN system) organizations should also be envisaged.

4.2.2. Monitoring

Monitoring of the tourism sector, including its various aspects and features is the basic component for any development strategy to be drawn up and followed.

In the ECWA region, the National Tourism Organizations are in charge of monitoring tourism movements, payments and policies as a major activity. However, their tasks are mostly limited to re-collecting the statistical data which are originally gathered by other public organizations, such as Statistical Office, Police-Security Department, or Central Bank, etc....

Closer co-ordination between the national tourism authority and other public administrations is required and this should cover all fields of tourism statistics, namely: data on incoming and outgoing tourism, domestic tourism-movements and payments, international - world tourism, tourist accommodation statistics, employment statistics, surveys on holidays and recreation travels and trips, visitors-surveys, tourist price index, etc.

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[1] In this connection ECWA countries could be inspired by the "List of academic training and scientific research institutions on tourism in some selected European and North American Countries" (17 countries in total). The list prepared by the ECWA Transport, Communications and Tourism Division (TCTD), was circulated to the National Tourism Organizations of the ECWA member states, in February 1983.

Since the international tourism flows represent the largest part of foreign visitors movement in the ECWA region, close co-operation among the countries of the area would help to provide appropriate statistical data on tourism. Intraregional co-operation could particularly be focused on joint surveys which would tremendously facilitate the evaluation of the main tourist markets and movements as well as save time and financial resources connected with this exercise.

Besides the tourism statistics, the monitoring problem has also to be examined in the light of other methods. The following points can be mentioned as the main items of evaluation and performance analysis in the field of tourism:

(a) Variations in the share of tourism sector in the GNP or GDP and balance of payments as obtained from national accounts and input/output analysis. (Constribution of the tourism sector to the national economy).

(b) Changes regarding the direct and indirect tourism investment in comparison with the total investment volume in the national economy.

(c) Implementation-status of policy measures undertaken in various fields of tourism development.

(d) Regional or/and local development effect analysis. (Regional input/ output analysis).

(e) Economic, social and environmental cost-benefit approach, or "use-value-analysis" at macro and micro levels.

4.6.3. Project identification and preparation.

Most of the problems arising in the field of tourism project identification and preparation are closely related to the tourism planning issues. In fact, the major aim of both socio-economic and physical tourism planning is the identification and the preparation of tourism project within the general framework of tourism development strategy and policies.

In the study area large scale tourism development projects are generally identified and prepared by the public authorities, and foreign consultancy plays an important role. Furthermore, individual tourism projects, such as hotel investments of the private sector, require approval by the respective governments. The responsibilities of the public and private sectors are not always well defined, and in some cases tourism projects-evaluation systems do not follow the requirements of national, regional or local tourism development policy and planning.

The preparation and evaluation (financial, economic and social of tourism projects must be the result of a team-work. In this respect the lack of co-operation and experience are clearly observed.

Integrated planning approach discussed in part 4.3 of this report can be efficiently used in order to increase the capability of preparing tourism projects in various circumstances. There is also a large scope for close co-operation and exchange of experience among the countries of the ECWA region in this field, which may easily cover joint investment opportunities and programmes.

While using project approach to the tourism development, special emphasis must also be laid on so-called "project cycle" which consists of six phases : identifications, appraisal, negotiations, implementation - supervision and evaluation of the completed project.[1] The application of this procedure of interconnected phases may solve or contribute to the solution of the problems emphasized above.

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[1] International Development Association (IDA): "IDA in retrospect", the World Bank publication, Washington D.C., 1982. page: 32.

4.6.4 Prices.

As a tourist destination area, the international and regional competitive position of the ECWA region is highly dependent on the prices of tourism goods and services. Besides, tourism development strategy and its connected policies should be based upon an appropriate pricing system.

A vital factor affecting the cost for the potential tourist of a holiday in the study area is the cost of travel to the area compared to the cost of travel to any other competing tourist destination area.

The cost of travel has two main components: accommodation and travel expenses. In the field of accommodation sector, the latest available data suggest that countries in the ECWA region are comparatively more expensive than the main world centres. 1/

The traveller's cost of living index given in Table 4.2 indicates the accommodation price level, including restaurant (food) prices, in the capital cities of the region compared with New York, London and Paris. The comparison is above all relevant for international business tourism.

For pilgrimage tourism, Saudi Arabia enjoys the privileged position of a monopolist market, hence the price setting system for local transportation, taxes and fees, and for the accommodation does not follow the classical demand and supply pattern.

As regards the price problems in the field of organized tourism (inclusive tours), since the ECWA region has limited organized holiday tourism traffic, this issue can only be examined in Egypt, Jordan and Syria and to some extent in the United Arab Emirates and in the Yemen Arab Republic.

1/ Some destinations of the study-area, such as Saudi Arabia, Kuwait, Bahrain and Qatar are among the most expensive countries in the World for a business traveller with a moderate budget.

Available data compiled in Table 4.3 suggest that the prices of inclusive tours from main European tourist originating markets to Egypt are quite competitive and this country can favourably compete with other similar (distance, tourism potential and facilities, organization and facilitations-wise) markets. For the other main destinations in the ECWA region, comparable data indicate relatively good competitive position of the region's tourist receiving zones.

However the same Table 4.3 based upon average prices in US$ of organized (inclusive) tours, including 15 days charter tours, accommodation, full board, transfer, etc. indicates for some competing distinations outside of the ECWA region and at the same distance from the generating markets, better competitive positions. This is mainly due to the mass-tourism policy conducted by these receiving countries, as well as because of the marketing efforts undertaken through the appropriate distribution channels.

While discussing the price structure of the organized tours, their six possible components must also be signed out: Airfare; Airport - accommodation establishment transfers and excursions; hotel or other accommodation, in some cases including meals; commission payments to travel agents in origin countries; tour-operators' overheads; and tour-operator's profit.

Furthermore, some of the organized tours from European markets to some destinations in the ECWA region such as, Sharjah or the Yemen Arab Republic, have specific price structures due mainly to the entry visa systems and quotas as well as to the particularities of the receiving markets. One can however underline that the present prices are appropriate and do not hinder the existing demand.

If and when the countries of the study area will promote the organized international incoming tourism, the competitive price setting system could be fully operational thus allowing a competition-wise favourable action on the world tourism markets. 1/

1/ It is a well known fact that lower tour prices attract demand. Past experience in international travel trade suggests that if the prices of the organized tours were to be reduced by 20% then demand would double and a 40% reduction in price would result in a quadrupling of demand.

Table : 4.2

Comparative daily costs of accommodation and meals on a moderate budget in the ECWA region (Middle of 1979)

Country	In Dollars 1/	Index of costs based on 100 at New York	London	Paris
Bahrain	218	179	173	160
Egypt	132	108	105	97
Iraq	108	89	86	79
Jordan	98	80	78	72
Kuwait	244	200	194	179
Lebanon	70	57	56	51
Oman	176	144	140	129
P.D.R.Y.	78	64	62	57
Qatar	206	169	163	151
Saudi Arabia	252	207	200	185
Syria	90	74	71	66
Y.A.R.	132	108	105	97

Note : 1/ These daily rates cover:

The cost of a single room in a first class city centre-hotel, as well as the cost of breakfast, lunch and dinner, and any other service charges incurred during the stay.

Source: International Hotels and Travel Annual 1980, International Hotel Association; Paris-London.

Table 4.3

Average prices in US$ of inclusive tours (IT)
(Organized tours of 15 days, including charter flight + full board accommodation and transfers etc.)

(September 1983)

To / From	Germany	Paris	Rome	Scandinavia	UK	Vienna
Egypt	1000–1500	1200–1500	1200–1500	1200–1500	800–1000	1000–1500
Jordan	1500–2000	1000–1200	1200	1500–2000	1000	1500–2000
Sharjah	1500–1700	..	..	1500–2000	2000	2000
Syria	1500–1700	1200	1300	..	..	..
YAR	..	2000–2500	..	..	2000	..
Some completing destinations:						
Canary Islands	1000	800–1000	800	800–1000	600	1000
Greece	600– 700	500	300– 600	700–1000	700	800–1000
Kenya	1500–2000	1500–2000	900–1200	2000–2500	800–1500	2000
Morocco	1000	700– 800	700–1000	1500–2000	700–1000	1000
Senegal	1500	1000	1200–1500	2000	..	2000
Seychelles	2000	1700–2000	1500–1700	1500–2000	1700	2500
Tunisia	800	400– 600	400– 500	1000–1500	500– 800	800–1000
Turkey	800– 900	900	800–1000	1000–1200	700– 800	800– 900

Source: Various publications and documents by tour-operators and travel agents, 1983.

(..) Not available.

Past experiences gained in other tourist destination countries, similar to the ECWA region, indicate that the more favourable case for a tourist receiving country would be through scheduled air service (in pool), and locally owned hotels. On the contrary, the less favourable case would be through charter airline of tourist generating country and foreign owned hotel.

Airfares on scheduled services which are another essential part of tourism pricing system, are subject to the International Air Transport Association (IATA) regulations as the national airlines of the ECWA countries, with the exception of Democratic Yemen Air, are members of this Association. The continuous IATA fare-increases and the lack of special fares such as charters, group inclusive fares on scheduled flights, Apex, etc., are surely affecting the air travel demand to the region.

The prices of other travel-transport linked services such as, taxi fares, inter-city bus fares, gasoline prices; car repair and maintenance costs, rent-a-car systems and tourist-guides are also relevant for the price policy formulation and implementation.

Some other aspects of the price-problem should also borne in mind. In the study area, inflation is playing a growing role on price structure, but its effects are counterbalanced by the exchange rate of national currencies among themselves and vis-a-vis the dollar, considered as the most common international monetary reference unit.

In any tourist receiving country where the real value of the national currency is largely devaluated against the currencies of the most important tourist generating countries, even high inflation rates would have no effect on the volume of the foreign tourist consumption.

The correlation existing between the percentage of the inflation (deflated price increases of most important tourist consumer goods and services) on one side, and the rate of devaluation of the national currency against the other currencies of the main tourist generating countries on the other side, determines the volume of the foreign tourist consumption.

Price policy in the tourism sector must therefore take into account specific measures regarding the exchange rate fluctuations, particularly in the countries or areas where an unofficial parallel (black) market rate might easily be built up.

4.6.5 Investment policies and incentives

Available information and data on tourism investment policies foreseen and conducted by the countries of the ECWA region suggest that the incentive measures undertaken are neither comprehensive nor clearly determined.

The government incentives to stimulate investment in the tourist industry and to give general support to the private sector has a rather wide range: loans, loan guarantees, subsidies, grants, fiscal inducements (tax holidays, depreciation allowances, import duty exemption, etc.), land availability, consultancy; technical assistance for design, management, operation, etc., financial inducements (differenciated interest rates, various grace periods or reimbursement periods). The countries should diversify their investment policies according to these possibilities and sponsor tourism investment programmes.

Another possible way of action in this line, could be the reinvesting of some part of tourism earnings in the physical capital for tourism development (infrastructure) in order to constitute the basis for a continuing, hence productive capacity. This issue concerns in particular the public investment and financing schemes providing support and assistance to the scarce financial resources of local administrations.

Hotels being the major tourism investment in the ECWA region, government sponsored investment policies should be diversfied according to the following cost components identified in hotel industry: 1/

1/ IUOTO: ibid, and International Hotel Association's (IHA) various publications.

(a) Construction and capital equipment contract with separate mechanical and electrical subcontracts. This includes air conditioning systems, plumbing, drainage, kitchen equipment and all fitted furniture and carpeting; (65-70% of total costs);

(b) Furniture and furnishings (including loose furniture such as beds, tables, etc., and curtains); (3-5% of total costs);

(c) Hotel operating equipment (cutlery, crockery, linen, etc., is included in (a) and (b) above);

(d) Development expenses and specialist fees (development and planning services, economic/financial/management consultancy, architects, etc.); (15% of total costs); and

(e) Working capital; (10% of total costs).

Diversified investment policies undertaken in accordance to the overall tourism development strategy, embracing both infrastrucures and facilities, if supported by adequate incentives and inducements, may contribute to boost tourism supply, quantity-and quality - wise.

4.6.6 Improvement and maintenance of facilities

Tourism facilities, largely consisting of accommodation and catering structures, travel trade and tourism infrastructure, must receive continuous attention regarding their improvement and maintenance.

In the ECWA region there is a general tendency to direct the development policies mainly towards new investment schemes whereas already existing tourism facilities and infrastructure remain neglected, and hence their improvement and maintenance are not included in the development programme.

Especially in countries where the hotel construction boom has started in the early 1970's the need for refurbishing and repairing schemes is becoming urgent. The optimum utilization of the tourism potential and facilities requires specific measures regarding their maintenance which can be provided by appropriate programming and planning.

4.6.7. Management

The main tourism management problems in the ECWA region are associated with hotel operations. Due to the growing new investments in the accommodation sector, the region has been attracting, for the last decade, growing number of transnational hotel corporations. They have been closely associated with the "take-off" stage of the region's tourism development and promoted special-interest tourism (business - commercial tourism in all parts of the region, holiday tourism in Egypt, Jordan and Syria, based upon country-or sub-regions' specific advantages.

The transnational hotel chains operate primarily as development and management organizations. They have generally no direct investment in hotels they operate. Therefore, their impact in the tourism sector is mainly on the management side.

It is very likely that the countries of the ECWA region will continue to manage their hotels through transnational - associated hotel companies in the foreseeable future and could benefit out of this situation, (for example: central reservation system, promotion of business - centres and conventions - congresses, marketing, qualified manpower, etc). However, they also should study very carefully the form, the legal, financial and fiscal structure, and the timing of the involvement of transnational corporations in the tourist sector. The foreign operations must be closely co-ordinated or supervised and the management contracts are unified and modified, from time to time, according to the priorities of the general tourism development strategy. In this context, the impact of transnationals in achieving the national tourism strategy targets and objectives as well as the most effective policy instruments for maximizing the net benefits of transnational corporations or finding out of some alternative to these corporations are the most important points to consider. [1]

Although construction of large hotels may be the quickest way of satisfying a rapidly rising demand for accommodation, governments in the region should also examine the possibility of supporting the development of smaller hotels and ensuring that it offers acceptable amenities, standards and terms. Such accommodation, complemented by the "larger hotel sector", would be an essential ingredient of government tourism management policy.

Attention to improving training schemes and facilities relevant to hotel and tourism management is also badly needed. Tourism training programmes should cover specific regular or up-grading courses on management, and the public and private tourism sector be closely associated with this exercise.

Furthermore, the management policy to be guided by the overall tourism development strategy, should also take into account various possible ways of hotel operation-systems applied by most of the international hotel chains. Those ways can be summarized as follows: [2]

(a) Developing and operating hotel units on fixed-period management contracts. The remuneration for the management company includes combined 9-12% of gross operating benefit <u>and</u> 3-5% of turnover, plus, in some cases, fees for pre-opening and technical assistance services;

(b) Developing and operating hotel establishments under leases (rent as % of the capital cost);

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[1] See: "Transnational corporations in international tourism", ibid page 32-33.

[2] IUOTO : "Impact of International tourism:, ibid, page: 42.

(c) Developing and operating hotels which they own wholly or in partnership with the government or private sector; and

(d) Developing franchised hotels.

The above indicated possibilities should be selected or combined according to the national needs and interests of the countries which are willing to operate their hotels through foreign management companies.

4.6.9. Protection tourism potential and environment

Policies in the field of protection of tourism potential and environment, conducted in the ECWA region require further and wider steps.

The tourism resources - both physical assets and cultural and socio-economic features - are, to a large extent, of a fragile character and have limited resilience and carrying capacity. The concentration in time and in space, which is characteristic of the activities linked to tourism and recreation, has added to their environmental impact. The risk of various disruptive effects is further enhanced by the superimposition of tourism on local recreation as well as by the high mobility that accompanies localized demand, owing to increasing availability of mechanized means of transport. Among the most important tangible negative effects of tourism on the environment; architectural destruction of the landscape, disturbance of the balance of the nature, haphazard building and unplanned settlement schemes are to be mentioned. They easily reduce the quality of life of native inhabitants and of the tourists.

The problem of environmental protection is also closely linked to the combined physical and socio-economic impact of tourism. In many cases tourism development maintains and protects sites of beauty and interest and will thus compare favourably with most other development options as regards its invironmental effects.

New techniques of assessment and planning of tourism potential and environment could certainly contribute to the preparation and implementation of appropriate policies in this field which must figure among the top priorities of the tourism development strategy in Western Asia. Special attention has to be given to the pressures on natural and schoological environmental resources in the study area which comprises the world'd famous and most important religious and historical sites.

4.3.9. Frontier formalities

There is hardly any other area in the whole tourism spectrum which can have such a deterrent and lasting effect upon the visitor as bad border formalities and associated services. They create the first impression that the tourist forms of the country, and which remains with him.

This problem area includes the following major issues:

(a) passports and visas;

(b) customs regulations;

(c) foreign exchange regulations and allowances for tourists;

(d) private cars formalities; and

(e) sanitary regulations.

Facilitation arrangements in the ECWA region are generally below the desirable level. This applies especially to the visas, to customs and currency regulations and private cars formalities. The attached tables 4.4 and 4.5 show this situation.

Existing common programmes or agreements on facilitation are not always followed by the countries. The main tourist entry points, major border check-points and their amenities are not sufficiently organized and equipped. Furthermore and generally, the frontier formalities foreseen for tourists are subjected to same national security and immigration requirements and are not separately implemented.

Table 4.4

Passport and visa formalities among the ECWA Countries
(Position at March 1981)

Visitors From \ Countries visited	Bahrain	Egypt	Iraq (a)	Jordan	Kuwait	Lebanon	Oman	PDRY (a)	Qatar	S. Arabia	Syria (b)	UAE	YAR
Bahrain		V		V	(c)	V	V		–	V		–	V
Egypt	V			–	(c)	V	V		V	V		V	–
Iraq	V	V		–	(c)	V	V		V	V		V	V
Jordan	V	V			(c)	–	V		V	V		V	V
Kuwait	–	V		–		V	V		–	V		–	V
Lebanon	V	V		V	(c)		V		V	V		V	V
Oman	–	V		V	V	V			–	V		–	V
PDRY	V	V		V	V	V	V		V	V		V	V
Qatar	–	V		V	V	V	V			V		–	V
S. Arabia	–	V		V	(c)	V	V		–			–	V
Syria	V	V		–	(c)	–	V		V	V		V	–
UAE	–	V		V	(c)	V	V		–	V			V
YAR	V	V		–	V	V	V		V	V		V	

Notes: For a stay of upto 3 months =

– : Valid passport without visa
V : Valid passport with visa

(a) Visitors from Arab Countries: Valid passport without visa, subject to reciprocity;

(b) Visitors from Arab Countries: National identity card or passport without visa;

(c) "Entry Permit" required.

Sources: A) World Tourism Organization (WTO), Travel Abroad, Frontier Formalities, 29th Edition, 1981 and 1983.

B) Traveller's Guide to the Middle East, London 1980.

Table 4.5

Currency regulations concerning foreign visitors
in the countries of the ECWA region
(Position at March 1981)

Country	Allowances	For Imports	For Exports
Bahrain	National banknotes Foreign banknotes Travellers cheques	No limit	No limit
Egypt	Egyptian pounds	L.E. 20.00	Nil
	Foreign banknotes Travellers cheques Others	No limit	Amount declared and not utilized
Iraq	National currency	I.D. 25	I.D. 5
	Foreign currency Travellers cheques	No limit	The undeclared foreign currency can be brought up to ID 500. The remaining Iraqi currency can be changed again.
Jordan	Jordan currency Foreign currency	No limit - to be declared	
Kuwait	Any amount of currency may be freely imported and exported		
Lebanon	National banknotes Foreign banknotes Travellers cheques Other payments	No limit	No limit
Oman	There are not restrictions on the amount of foreign currency which may be taken into or out of Oman.		
PDRY	National currency	PYD. 5.00	DYD 5.00
	Foreign currency Travellers cheques	No limit	Balance of unspent foreign currency subject declaration of arrival
Qatar	No currency limitations		No limit
S. Arabia	No currency limitations		No limit

Cont'd/...

Table 4.5 (Cont'd)

Country	Allowances	For Imports	For Exports
Syria	National Banknotes	100 LS	100 LS
	Foreign banknotes	No limit	Upon to the amount
	Travellers cheques	No limit	declared on entry
U.A.E.	There are no restrictions on the import or export of currency.		
Y.A.R.	Foreign currencies may be freely imported and exported, and can be converted into local currency at banks or authorized exchange dealers.		

Source: A) WTO, Travel Abroad, Frontier Formalities. 29 Ed., 1981 and 1983.

B) Traveller's Guide to the Middle East, London 1980.

In order to promote intra-regional and international tourism in Western Asia, a new tourism development strategy in the ECWA region should seriously reconsider the relaxation of the most important frontier formalities.

5. PROPOSED STRATEGY

This chapter describes the regional strategy for the development of tourism in Western Asia stressing its objectives, targets and policies. The proposed strategy is based both on the tourism development potential and on the present state of tourism operations and activities in the ECWA region. It also takes full account of the problems, constraints and difficulties discussed in the previous chapters.

The main characteristic of the strategy is its intraregional approach which calls, over and above all, for the closest possible co-operation among the ECWA countries.

5.1 Objectives

The main objectives steering the desired orientation of the tourism development in the ECWA region are: 1) Promotion and protection of the historical and socio-cultural identity of the region, 2) Achievement of a balanced and integrated tourism development in economic, social and environmental point of view, 3) Sound exploitation of tourism resources of the region, and 4) Full recognition of tourism as a right to holidays, leisure and rest for all strata of the population without descrimination.

The first priority objective aims at avoiding the erosion of cultural and historical heritage of the ECWA region. It emphasizes the close interconnexions existing between the promotion and the protection of socio-cultural and historical values on one hand and various tourist resources of the region on the other.

In fact, tourism could and should promote the social, cultural and historical image of the region throughout the world and at the same time preserving these values which belong to the entire humanity.

This approach implies, inter alia a balanced and integrated tourism development as indicated in the second objective. The basic challenge implicit in the task of designing a regional (multinational) toursim strategy is to integrate the tourism development into the various socio-economic sectors as well as into all sub-regions and countries, i.e. physical or spatial integration.

Another objective of the proposed strategy is the sound exploitation of tourism resources, meaning not only the growth in tourism income or flows, but also their qualitative improvement which is the socio-cultural development, beneficiary both to tourist receiving and tourist generating countries. The orientation of the regional tourism development strategy in the ECWA region should not exclusively cover the tourist markets in economic sense, but it has also take into consideration all the cultural, social and environmental particularities and resources of the host countries as a whole.

"Tourism resources are part of the heritage of mankind. These are resources whose use cannot be left uncontrolled without running the risk of their deterioration, or even, their destruction. The satisfaction of tourism requirements (the exploitation of tourism resources) must not be prejudicial to the social and economic interest of the population in tourist areas, to the environment or, aboveall, to natural resources and to historical as well as to cultural sites".1/

1/ Manila Declaration on World Tourism, adopted by the World Tourism Conference held at Manila, Phillipines, from 27 September to 10 October 1980.

Furthermore, much attention must also be given to the management of the natural and cultural heritage while formulating and implementing a tourism development strategy. The development of holiday and travel activities must be co-ordinated with those of the environmental protection and improvement.1/

The objective of recognizing toursim as a right to rest, leisure and leave with pay in order to facilitate the access to tourism travel and holidays for all layers of the population is one of the bases for tourism development strategy in the ECWA region. As accepted and stressed in many occasions by the international community "tourism is not any more a luxury but an imprative necessity and therefore it is essential to move beyond mere recognition of a situation and provide the appropriate practical conditions under which the right to tourism can be satisfied."2/

The "imprative necessity" for tourism (national or international) is not only dictated by the improvement of the quality of life or by other motivations, but also by other indicators such as the growth in urban population. It is a well-known fact that the urbanization is in general accompanied by high propensity for recreation, leisure and hence for tourism movements. Therefore further urbanization and urban population increases in the ECWA region will certainly contribute to further development in tourism demand and will put

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1/ World Tourism Organization (WTO) and United Nations Environment Programme (UNEP) joint declaration.

2/ WTO Information Bulletin: "Overview of the World Tourism meeting" at Acapulco - Mexico, 21 - 27 August 1982".

higher preasure on tourism needs, requirements and participation. According to some estimates, the population of three major cities in Western Asia will reach the following dimensions in the year 2000; Cairo : 16.4 millions, Baghdad: 11 milions and Alexandria 5.6 millions.1/ It is therefore essential to include tourism and recreation issues in the urbanization process and policies. This fact has been also emphasized in other studies stressing the growing need for leisure travel and recreational facilities in the major urban agglomerates of the ECWA region.2/

The objectives described above, distinguishing three approaches (economic, sociocultural and environmental), are the key concepts to be followed while formulating a strategy for the development of tourism in the ECWA region. They will enable the right evaluation regarding the balance of advantages and disadvantages of the tourism development and at the same time provide a solid ground for the targets and "differentiated but integrated" tourism policies.

1/ See. Documents submitted to the International conference on population and the urban future, Rome, Italy, 1-4 September 1980.

2/ F. Abu-Aianah: "Urbanization in the Middle East in World perspective" and J. Clarke: "Contemporary urban growth and concentration in the Middle East"", both published in "Population and development in the Middle East", UN-ECWA, Baghdad 1982.

Some estimates are even higher than the previous ones.

	Population (in millions)	
Cities	1970	Estimates for the year 2000
Aleppo	0.6	2.2
Alexandria	2.0	7.2
Baghdad	2.2	12.0
Greater Beirut	1.0	3.5
Cairo	5.7	20.6
Damascus	0.8	3.0
Kuwait	0.6	4.5

(See: F. Abu-Aianah : "Prime cities in the Arab World", "Population and development, op. cit,, page 300).

5.2 Targets

Based upon the development potential, needs and aspirations of the region as well as considering the objectives of the strategy in a more quantitative way, the following targets can be proposed. These mostly quantified targets are medium and long-term (until the year 2000) aims to be achieved by implementing a clear-cut and large-scale tourism plan in the ECWA region. They are achievable only if and when objective - oriented tourism policy measures and actions are carried out within the framework of an intraregional tourism development strategy.

Target number one concerns the creation of fully operational intraregional tourism circuits. The implementation of this target depends on the availability of tourist infrastructure and facilities as well as on marketing measures to be undertaken. The development of "marketable" tourist itineraries in the region as a target would primarity promote national and intraregional tourism. They would also serve to link the region to international toursim circuits.

The second target must aim at integrating the Western Asia to the main international tourism circuits. The ECWA region is favourably situated at the crossroad of the major tour itineraries in the world, namely from Europe to Asia and from North of Europe to Africa and to the Far East. While taking the necessary measures to attain the first target, the region should follow at the same time the second target and integrate its tour itineraries to the world's most important tourism routes. Here again, the creation of an appropriate transport infrastructure and network as well as imaginative marketing policies are the most important actions to be undertaken by ECWA countries as a whole.

The third target is directly related to the previous one, it implies the existence of fully completed tourism infrastructure and facilities in the ECWA region. The potentiality studies[1/] covering all tourism resources and attractions

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1/ See ECWA/TCTD reports on tourism development potential, ibid., and the consultant report on mathematical analysis of tourism resources and attractions, ibid.

of the region, have clearly indicated that the minimal tourist quality of various infrastructures, lodging and catering facilities are not completely adequate in most of the ECWA countries. Therefore the region should strive at improving its tourist infra- and super - structures.

The fourth target is a basic tourism policy issue which would secure that by the year 2000, the ECWA region's tourism sector should be fully self-reliant. The self-sufficiency has to be achieved in finance, management and manpower spheres. The ECWA countries as a whole should be able to finance and operate their tourism sector with their own financial, and manpower resources. The external dependancy, especially in the field of tourism management and labour sectors must be reduced to a minimum, if not completely eliminated.

The last target is purely quantitative. By the year 2000, the actual share of the ECWA region in international tourism movements and payments should quadruple. At present, the share of the region in world tourism is very low; every year only 2 per cent of the international tourism movements are attracted towards Western Asia and the region's share in international tourist receipt is only 3.4 per cent.

In the year 2000 the ECWA region could easily host at least 8 per cent of the total world tourists and could have 10 to 12 per cent of the world tourism receipts. This is a realistic target for a region possessing very rich tourism development potential compared to other parts of the world.

The above discussed objectives and targets are all interrelated, hence the fulfilment of one objective or target heavily depends on the progress made in accomplishing the others. That is why the priority setting system and the policies foreseen in accordance with the tourism development strategy, should cover in a comprehensive way all the aims for developing tourism in the ECWA region.

5.3 Policies

In order to reach the above objectives and targets, following tourism policies should be foreseen by the tourism authorities in the ECWA countries as an integral part of the intraregional development strategy.1/

It is obvious that besides the main policy issues indicated hereunder, there are others which are connected with the tourism promotion and development in Western Asia. However, these policy matters are rather secondary and they have already been mentioned together with the problem areas previously identified in this report.

5.3.1. Facilitations and frontier formalities

Various problems identified in the field of border crossing formalities (see chapter 4.6.9 of this report) necessitate ad hoc policy measures covering physical and non-material aspects. First of all the main tourist entry gates, major border crossing and check-points and their amenities must be sufficiently organized and adequately equiped. Besides these "physical" measures, the policies to be implemented in this field should meet the requirements of modern tourism movements. The liberalization and relaxation of customs, passport, visa, foreign exchange, private cars, sanitary regulations and other formalities for tourism purposes, are essential for any further development of tourism in the ECWA region.

Security controls or application of the national laws and regulations should not represent unnecessary obstacles for visitors and thus hinder the smooth movements of travellers into and within the region. In this respect ECWA countries could easily follow the same pattern already implemented in other countries which completely separate the frontier formalities foreseen for tourists from other national security and immigration regulations.

1/ Policies to be formulated and implemented should consider all aspects and possible consequences of international tourism developments during the comming years. See: International Association of Scientific Tourism Experts (AIEST-IASTE): "The changes of tourism in the Eighties and their consequences", Vol. 24, St. Gallen (Swizerland), 1983.

5.3.2. Manpower development

Based upon the manpower planning, the development policies to be conducted in this field should incorporate the two following approaches: 1) Assessment of tourism manpower leading to a precise analysis of the availability and qualifications of the labour sector's resources as well as facilities and in means for manpower training and upgrading, at basic, medium, high and management levels, 2) Co-ordination of labour and manpower related measures at the regional level.

The particularity of the ECWA region and the specific characteristics of the tourism sector including lodging industry, travel trade and tourism transport, must constitute the broad frame within which appropriate manpower policy measures should be undertaken.

The recruitment and training of tourism personnel, expecially with view to attracting young people and female employees to the hotel and tourism professions; detailed quantitative and qualitative analysis of tourism manpower requirements in the ECWA region are the main issues to be tackled by the regional manpower development policies.

5.3.3. Investment policies

Policies in the field of tourist investment encompass two main fields of action : 1) Tourism infrastructure, 2) Tourist facilities and amenities.

For the creation and improvement of tourist infrastructure, special financing and physical planning methods should be applied in the region. Reinforcement of the administrative structure of the local authorities directly responsible for tourism infrastructure as well as the availability of specific public funds for their use are among the priority measures.

Regarding the tourist facilities, in particular accommodation and catering amenities, the core of the investment policy to be adopted includes various financial, fiscal and economic incentives and inducements. The wide range of policy measures at the disposal of tourism authorities were mentioned in chapter 4.6.5 of report while discussing the problem areas associated with the investment sphere. The use of these policy instruments could contribute to the success of tourism investment policies in the region.

The cost-benefit approach involving economic, social and environmental "use - value - analysis"[1/] is the essential ground on which a regional tourism investment policy can be constructed. Therefore, investment policies to be formulated and implemented by the ECWA countries as a whole, should not only foresee an increase in tourist receiving capacity, but they should also be aware of various "qualitative" facets in the tourism investment costs and benefits to the ECWA region.

The high social and environmental costs of tourism development leading to devastation of the spatial and socio-cultural resources merit special attention by the tourism policy makers in the region. These costs can only be diminished when the investment policy is formulated according to the optimum balance between all types of costs and benefits of tourism investment schemes.[2/]

5.3.4 Price Policy

The prices of tourist goods and services in the ECWA tourist receiving market is one of the principal components of the ECWA regional tourism policies.

1/ AIEST: InternationalAssociation of Scientific Tourism Experts: "Interrelation between benefits and costs of tourist resources", Berne - Switzerland, 1982.

2/ For the role of cost-benefit analysis in environmental decision-making process see: "Managing the Environment", UNEP Studies 7, Nairobi 1983, and various other UNEP studies published in the same serie.

The international tourism markets being highly competitiive, the prices of tourist products supplied by the ECWA countries in world markets, particularly for the organized tours, must take into account the international pricing levels. (see Table 4.3).

For individual tourists, the accommodation and associated prices are relevant. As underlined in chapter 4.6.4, for the ECWA region the traveller's cost of living index indicates very high price levels, especially for business tourism.

The present level of hotel prices in the region and the pre-set IATA airfares for airtravel to the region make it very difficult to implement an internationally competitive price policy. Therefore, investment and operational costs cuttings, effective marketing and better management of tourist facilities become essential for a new price policy capable of attracting inbound tourism flows. Furthermore and in the airtransport sector, a new price policy based upon promotional and charter flights is needed. The prices of other tourist transport modes should also be readapted according to a new competitive price policy. In the same context, appropriate price control mechanisms should be introduced in order to keep the steady increase of the demand for specific tourism forms such as, religious tourism, summering, social tourism, youth tourism, recreation, health tourism and holiday travelling within the region.

5.3.5. Marketing

The essentials of marketing policies for the ECWA intraregional tourism are directly linked to the better understanding of tourism marketing which aims at gearing the tourism products and services to the wants and needs of the tourists. They are also related to the existing tourism market mechanism.

As indicated in Chart I designed by the TCTD, the ECWA tourist receiving market operates according to various interactions between demand and supply components. Tourism types and tourist consumption are determined by the motivations in tourist generating markets, while the intraregional tourist products are shaped and supplied by the travel trade in accordance with the marketing and promotion actions whose framework includes the marketing-mix and the promotion-mix, comprising various interconnected elements.

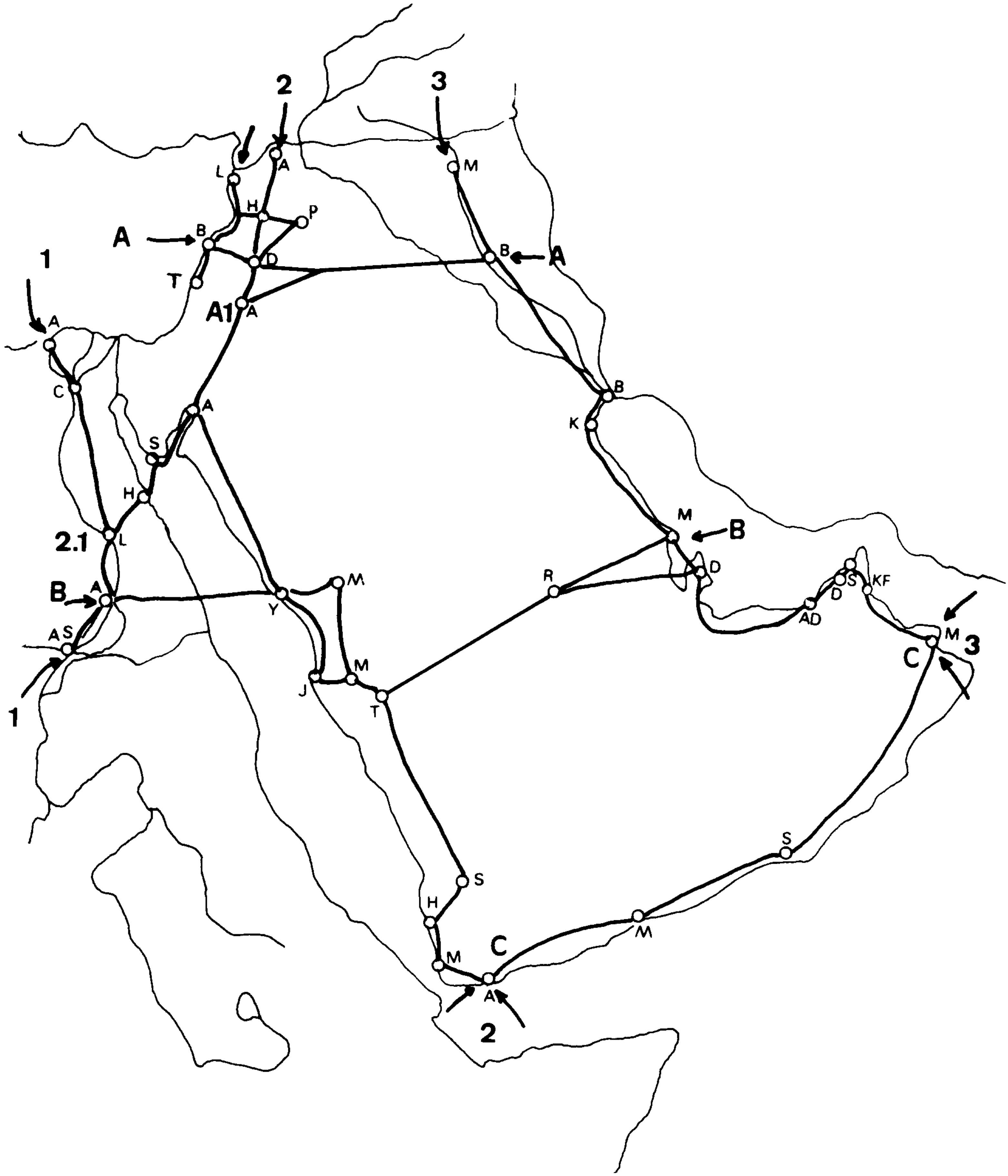
The optimum functioning of the ECWA tourism market mechanism can be achieved through appropriate marketing policies. The first element in the marketing policy field is the " tourist image" of the ECWA region. Various "historical", "classical" or "traditional" aspects, attractions and resources of the region contribute to the image. These include: Religion and holy places for the three most important monotheistic world religions; Oil production leading to international business; The Nile Valley and Mesopotamia as the locations of the world's oldest civilizations; World oldest continuously inhabited cities (Aleppo, Damascus and Jeriche and World's oldest port(Byblos); Mocha as the original name for the coffee; One thousand and one nights legend; Sindbad as the legendary symbol of Arab Sailors and "Arab Odyssey", etc. They are most relevant items which have created during the centuries a given world image for Western Asia. All positive aspects of this "image" should be utilized by the marketing policy in order to create and to promote various types of tourism demand for the region as indicated by various components in the attached chart on market mechanism for the ECWA region.

The tourism marketing policy at ECWA regional level should then establish and supply specific tourist itineraries and tours. The attached sketch shows the major tour itineraries in the ECWA region, comprising three north-south axis (number 1, 2 and 3) and three east-west axis (letter A, B and C). The sketch summarizes the Map II which has already indicated the details of the marketable tours. (Chapter 4.3.2.2).

The next stage in the marketing policy is the distinction between competing and complementary markets in the ECWA region. The region composed by two sub-regions has already a complementary characteristic due to its geographical, natural and climatic particularities. The northern ECWA sub-region, embracing Iraq, Jordan, Lebanon and Syria, forms the "Fertile Crescent" against the Arabian Peninsula and the Nile Valley. These two sub-regions are complementary in many ways, especially with regard to the landscape, climate, geomorphology and other aspects of natural and human environment.

SKETCH

Major Tour Itineraries in the E.C.W.A. Region



Furthermore, as already indicated in the previous chapters of this report, as well as on the basis of the mathematical analysis, evaluation and classification of tourism resources and attractions in the ECWA region, several tourist attractions and resources of the region can be considered as complementary[1/]. For example, the hill resorts of Lebanon and Syria with the sea resorts and historical sites of the Levantine costs; the tourism resources of the Yemens among themselves; the business tourism centres of the Gulf with various sea resorts and oasis; the historic Nile Valley with the Red Sea and the Mediterranean Sea resorts; sites; the "Holly Land" with sea resorts and wild life etc.[2/].

As for the competing side of tourist resources which must be considered for the tourist product design and marketing policies, the ECWA region's various historical and archeological sites such as, Palmyra, Ancient Mesopotamia, Baalbeck, Petra and the Nile valley can be mentioned. The competing features are also present for various natural attractions (sea resorts of the Gulf, the Mediterranean or Red Sea) as well as for cultural or business centres. However, this "intraregional" competition is absolutely not relevant for the marketing purposes, since the complementary approach is always prevailing and tourist products are always designed to incorporate the most appropriate blend of tourist attractions.

Regarding the international competition or complementarity of the ECWA tourist receiving market, the main issue is the integration of the region into the international tourism ciruits as mentioned in Chapter 5.2. Once the region is fully linked to the world tourism circuits, the competing aspects of the regional market will only be limited to the price policy. In other words, well planned and appropriate tourism marketing policies for the ECWA region would create a complementary situation for Western Asia in the world tourism markets and at the same time would enhance its competitive strength in international tourism markets.

1/ See: "Mathematical analysis, evaluation and classification of tourism resources and attractions in the ECWA region:, UN-ECWA, April 1983, Baghdad. This report is also one of the principal sources for the proposed intraregional marketing policy.

2/ This "complementary approach" has been fully considered in Chapters 2.8 and 4.4.1 when various resources and markets were combined for given tourism supply and demand types (Tables 2.1 and 4.1).

In conclusion, the image promotion, the establishment and operation of integrated tour circuits, the full consideration given to competitive and complementary supply structures and market segments, constitute the key issues for successful tourism marketing policies in Western Asia.

5.3.6. Management policies

Development policies associated with tourism management issues have two distinct facts: 1) Public sector administration, 2) Management of facilities, business administration.

Public sector tourism management policy, largely subject to the requirements and decisions of public authorities should nevertheless incorporate basic management principles such as, optimum organizational structures with detailed job descriptions and staffing rules; functional task, competence and responsibility analyses; regular performance and efficiency controls, etc. Besides, political pressures should be eliminated as much as possible while implementing government's tourism management policies.

The interrelations and interactions among the central tourism authority and its regional and local branches should be clearly defined and not only hierarchical but also co-operational and co-ordinating channels must be followed. Delegation of decision-making and a certain degree of freedom in action-taking process can certainly contribute to the effectiveness of public sector tourism management.

At ECWA regional level, the national tourist authorities (ministries, agencies, organizations, etc.) of the member States should be able to formulate and implement joint management policies. The governmental management policies in Western Asia should also be closely co-ordinated through appropriate regional organizations. In this respect the role and functions of the Arab Tourism Union and other regional professional or financial organizations are vital. (see Chapters 3.4.2 and 4.2.3 of this report).

The policies in the field of tourism business administration cover a wide range of issues: commercial management of tourism structures, facilities and amenities in lodging, travel trade and catering sectors; personnel management; real estate administration; financial administration; management of public funds involved in tourism facilities, etc. Besides the general management rules and basic management techniques fully applicable to tourism establishments, tourism business management in the ECWA region should also concentrate on training activities. Promotion of training at management level, badly needed allover the region, would reduce the impact and the role of transnational tourism corporations operating in all ECWA countries. (see Chapter 4.6.7).

5.4. Alternative strategies

As already emphasized 1/, the implementation of a new strategy for the development of tourism in Western Asia will entirely depend on political stability in the region. Without peaceful conditions, the strategy proposed in this report can never be fully implemented. In fact; all the elements of the strategy such as its objectives, targets and policies presuppose normal socio-economic and political environment as the prerequisites for the tourism development.

In case the present confused military and political situation continues to prevail in the region, the introduction of alternative solutions to the strategy described may become essential. However such an approach would necessitate further and much more detailed analyses leading to various tourism development scenarios which cannot be easily undertaken within the compact frame of the present study.

Therefore at this stage only the following general strategy modifications can be highlighted:

1) In case of continuing turmoil in the region, the specific tourism forms such as, national tourism, recreation and short-trips, social tourism, summering, youth tourism etc. must have the first priorities for the tourism development policies. They should receive full support by the authorities and have to be strongly promoted.

1/ See the introduction to the Chapter 4 of this report.

2) In crisis situation, the policy measures to be undertaken within the framework of tourism development strategy should focus on special - interest tourism types: business - commercial tourism, political tourism, congresses and conventions, pilgrimage - religious tourism, family visits, etc.

3) The marketing policy must concentrate on <u>intra-regional multicentre tourism</u> which mav remain relatively unaffected by the political instability in the region. Furthermore this "multicentre approach" would certainly facilitate the optimum distribution of tourism benefits in the region.

4) The investment, price, marketing and promotion policies should be implemented at sub-regional or local levels. In fact, in the ECWA region, in spite of political and military turmoils, some sub-regional zones with high tourism development potential (rich in tourism resources and atractions) can always attract large number of foreign or local visitors. To this effect, additional and special tourism promotion campaigns might become necessary.

5) Increasing public sector guidance and involvement, especially in the field of tourism investment policies with special fiscal and financial inducements, and in tourism management and marketing spheres could effectively contribute to promoting and developing the tourism sector in times of crisis. In this sense, adequate modifications in public sector tourism organization and management must be undertaken.

5.5. Summary

In summary, the proposed strategy with its objectives, targets and policies places increased emphasis on a new type of regional tourism development in Western Asia.

The two main components of the strategy described in this report are the planning and the marketing, covering tourism supply and demand fields respectively. The regional development process proposed cannot start until there is consensus regarding the growth pattern of tourism among the ECWA member countries. It is however not necessary that all the countries in the ECWA region follow the same policies. Depending on the nature of outstanding attractions of each country, its tourism resources and possibilities, it is quite possible that one member country would promote a specific tourism type while another country may wish to concentrate type of tourism development. The most important issue is the agreement and the basic joint ground to be found upon which the regional marketing strategy and development planning can be established[1/].

According to the stages of their tourism growth policies and potentialities, the countries in the ECWA region can be classified in four main groups (see Chapter 3.4.1 of this report). Following this grouping on one hand and considering the above "differentiated tourism policy approach" on the other, the proposed government tourism policy measures and actions can be illustrated as in Table 5.1.

This summary by country-groups and by tourism policies in one of the basic facets of the strategy for the development of tourism in the ECWA region. An appropriate set of policies should be followed, the mix of which will depend on the the specific situation and priorities in each ECWA country.

The government tourism policy as shown in Table 5.1 puts particular attention on economic and physical (land-use) tourism planning which is the process of decision-making that aims at bringing about an optimum combination of tourism activities. It should also be noted that the "quantitative and qualitative" tourism planning as the basic tool of the proposed tourism strategy in the ECWA region should be considered in three dimensions: 1) Perspective planning (for long-term strategy), 2) Medium term planning (tourism strategy mostly incorporated in five year development plans) and, 3) Short-term plans (within the framework of annual policy and investment programming).

The most striking result that emerges from the above summary is the need for a new development strategy-implementation in the ECWA region, requiring major revisions of the existing tourism policies with completely new objectives, targets and priority-setting systems.

1/ The same approach is also emphasized for the other world regions; see: "The formulation of basic concepts and guidelines for preparation of tourism sub-regional master plans in the ESCAP region", "Transport and Communications Bulletin for Asia and the Pacific", UN, New York 1978, p. 40.

Table 5.1 Summary of proposed measures and actions in the field of Government tourism policy in the ECWA region

Country groups according to chapter 3.4.1 of this report	Planning, Organization and Co-ordination	Government Tourism Policy	
		Actions on Supply	Actions on Demand
1. Countries with already developed tourism structures. (Egypt, Jordan, Lebanon)	- reorganize the tourism sector. - increase the planning capability. - Coordinate better the tourism operations.	- support tourism investment projects. - substitute imports in line with international prices. - protect natural and human environment.	- expand market and marketing research and actions. - concentrate on high potential tourist generating markets. - ease border crossing formalities.
2. Countries with stronger government (public sector) involvement in tourism development. (Iraq, PDRY, Syria).	- activate the preparation of regional and local tourism master-plans. - support assistance for sub-regional and local authorities. - coordinate better public and private sectors' tourism activities.	- activate tourism development projects. - stabilize prices of tourist goods and services. - monitor public sector tourism activities and operations.	- promote internal and intraregional demand. - concentrate on specific international marketing actions. - monitor foreign exchange policies. - facilitate border crossings for tourism purposes.

Table 5.1 (Cont'd)

Country groups according to chapter 3.4.1 of this report	Planning, Organization and Co-ordination	Government Tourism Policy	
		Actions on Supply	Actions on Demand
3. Countries following policies for specific tourism forms, attracting "special interest groups". (Kuwait, Qatar, Saudi Arabia, the UAE).	- expand investment programmes for infrastructure and tourist facilities for specific tourism types. - prepare a global national tourism concept, including hotel investment, specific tourism demand and forms, etc.	- avoid over-capacity. - switch to complementary and alternative tourist facilities. - monitor tourism supply capacity. - implement price-stabilization policies according to international travel market situation.	- support intra-regional tourism co-operation and marketing. - monitor tourism demand (inbound and outbound). - facilitate tourism travels.
4. Countries with not yet fully utilized tourism potential (Bahrain, Oman, the YAR).	- organize the public and private tourism sectors. - expand tourism investment schemes. - prepare comprehensive and integrated tourism plans.	- increase the project preparation and evaluation capability. - concentrate on specific tourist zones and investment-types.	- prepare marketing plans. - expand tourism promotion activities. - relax frontier formalities for tourism.

6. RECOMMENDATIONS

In order to implement the proposed strategy for the development of tourism in the ECWA region the following recommendations are formulated. These encompass measures, actions and other activities capable of eliminating or alleviating the problems, constraints and obstacles identified in the report, and taking full consideration of the findings and analyses presented.

The recommendations are proposed under nine headings according to the fields of action required. They constitute a step by step approach with a broad basis for further discussion and consideration by ECWA member countries.

6.1. General tourism concept and planning

6.1.1. ECWA member States should adhere to and implement the "Manila Declaration on World Tourism" adopted by the World Tourism Conference held at Manila, Philippines, from 27 September to 10 October 1980. They should also implement the resolutions of the World Tourism Meeting held at Acapulco, Mexico, from 21 to 27 August 1982. This will enable ECWA countries to follow the new conception of tourism development, unanimously accepted by the world community.

6.1.2. Countries in Western Asia should develop and define a clear tourism concept at national level, including not only holiday or leisure-time tourism but also business tourism and pilgrimage, recreation and domestic tourism issues. This concept should constitute an integral part of the general socio-economic development strategy and land-use policy conducted according to national interests, priorities and choices.

6.1.3. Tourism planning, both socio-economic and physical (land-use), should guide the design and the implementation of tourism development policies. Taking account of social, economic and environmental objectives and constraints, tourism planning must be fully integrated into the overall development planning. In this respect, it is recommended that close co-ordination and collaboration should be established between national authorities and central tourism administration.

6.1.4. Tourism sector policies and operations should be subject to a continuous planning exercise, including strategic planning, medium-term planning and short-term programming. The countries in the ECWA region should be articulate in seeking a larger share in the international tourism traffic and payments and must lay the foundations essential for a sound tourism development. Since most of the problems faced by tourism authorities in member countries are of a medium-term nature which do not lend themselves to overnight solution, the governments must always bear in mind a medium and long-term perspective, even when taking short-term policy measures.

6.1.5. The socio-economic and physical tourism planning methods and systems should be improved according to the realities, particularity and requirements of the tourism development in the ECWA region.

6.2 Tourism research and monitoring

6.2.1. Countries of the ECWA region should foster joint tourism research and survey programmes pertaining to various aspects of international, regional and national tourism. In this context, joint multidisciplinary methodologies and research centres could be developed.

6.2.2. Tourism authorities in Western Asia should monitor tourism flows, both international and national, payments and investment programmes. In this respect, a close co-operation has to be established with various public authorities and private entities dealing with tourism statistics, border crossing formalities, investments, management, manpower and training.

6.2.3. To achieve optimum utilization of the tourism development potential in the region, the following fields should be further assessed, analysed or surveyed:

(a) Tourism attraction and resources of the ECWA region should be assessed in detail and classified;

(b) Methods and processing techniques for statistical data collection should be developed;

(c) uniform accounting system for tourism establishments and standards for accommodations and other related public amenities such as restaurants, bars, nightclubs, etc. should be set-up, rated and supervised; and

(d) Project preparation and evaluation techniques must be reviewed in the light of common experience and needs in the region.

6.3. Manpower development

6.3.1 It is recommended that public authorities take steps necessary to assess the tourism manpower training needs and resources in order to create adequate structures for vocational training courses at basic, middle, higher and management levels for hotel and tourism occupations.

6.3.2. Shortage of skilled manpower in the tourism industry is continuing to retard the overall development of this sector in the ECWA region. Tourism authorities should plan and implement an appropriate manpower development and training policy at regional level. The problem of the increasing number of foreign workers in tourism, hotel and catering sectors should be considered and appropriate measures to attract local people to tourism occupations must be envisaged.

6.3.3. A tripartite tourism co-ordination should be established in each country, comprising government agencies responsible fo tourism development and training issues; hotel and travel trade representative and unions; and tourism sector workers.

6.4. Tourism co-operation

6.4.1 Regional tourism co-operation among countries in Western Asia should cover the main issues related to tourism development. Special attention should be given to joint training, investment, management, financing, promotion and monitoring. In this respect, the review and the reactivating of the existing multilateral and bilateral tourism agreements, joint ventures and intraregional investment programmes are prioritary actions to be foreseen.

6.4.2. Specific measures should be undertaken by tourism administrations to promote travel trade (travel agencies, tour-operators, air-lines, etc.) activities in the ECWA region. Closer tourism co-operation at national and regional (multinational) level should be created among tourism authorities, loding industry and travel trade.

6.4.3. Tourism co-operation at the ECWA regional level should fully incorporate all activities of both public and private sectors aiming at the overall development of tourism in the region.

6.5. Tourism marketing

6.5.1. Tourism planners and policy makers should think and act on "marketable tours" basis leading to multi-centre tourism development. This concept should comprise various types of tourism demand emanating from main international, regional and local tourist generating markets. It has also to take into account all combined touring potentialities by air, road and sea.

6.5.2. Representing a compact, homogeneous cultural and linguistic entity, possessing similar tourist resources and attractions, and catering to similar tourist generating markets, the ECWA region should be able to plan a joint tourism marketing scheme and implement it at regional and sub-regional levels. This programme should be based upon appropriate intra-regional market-and marketing surveys and studies.

6.5.3. Closest possible partnership should be created between national tourism administration and travel trade. National tourism organizations could provide sales aid for travel agents and tour-operators, hosting possibilities for familiarisation and survey trips, and possibly join advertising with airlines, tour agencies, etc.

6.5.4. In the ECWA region, where almost all countries are competing in the international and regional tourism markets, mechanisms of permanent consultation and co-ordination should be developed to avoid the possible negative economic, social and environmental effects of unrestrained attempts to increase market shares.

6.5.5. Tourism and air-transport authorities in the region should examine the possibilities of developing the charter flight business into the region and should take the necessary measures in the field of joint promotion and marketing for organized tours.

6.5.6. Tourism authorities in the ECWA region should jointly prepare tourist information material such as, booklets, pamphlets, brochures and maps. In this context, the publication of a regional tourism map is particularly recommended.

6.6 Organization and management of tourism sector and tourist facilities.

6.6.1. ECWA member States should strive at introducing new management methods in order to strengthen their tourism administrations and to improve their public organization systems in the field of tourism.

6.6.2 The existing regional and national professional associations in the tourism field, such as hotel associations, travel agencies unions, air carriers federations, etc. should be strengthened and further developed.

6.6.3. New regional hotel and tourism management programmes should be developed by the tourism authorities of the ECWA region. Supported with the possible regional financing, these arrangements could, at a later stage, pave the way to replace the foreign transnational corporations in operating tourism facilities at regional level.

6.6.4. Governments of the ECWA region should assess and guide the operations and impact of transnational corporations in the field of tourism especially in the hotel management sector. In particular, the modalities of the agreements, the resources and inputs to be provided by the transnational companies as well as their contribution to national tourism development efforts must be scrutinized.

6.7. Tourism infrastructure and tourist transport

6.7.1. ~~New~~ planning and financing methods should be introduced by ECWA member States to improve and create tourist infrastructure, particularly with view to developing intraregional tourism. Additional funds should be allocated, according to the findings of tourism planning, to finance the most important local tourism infrastructure programmes, such as basic water and energy - supply, feeder roads, sewerage system, waste disposal, telecommunications, improvement of tourist and recreational resources, etc.

6.7.2. It is recommended that appropriate measures be taken to facilitate and promote car touring to and within the ECWA region. Essential actions would be efficient facilitation of travel movement, introduction of car ferries, availability of easy car hire-systems and other facilities, such as rest places, restaurants, car repair and petrol stations on the main highways, particularly on those connecting the capital cities.

6.7.3. To facilitate reaching important tourism localities, sites or spots, directions and access to highways and roads connecting them within the national network should be clearly indicated. It is recommended to implement the Vienna Convention on Road Signs and Signals.

6.7.4. Various aspects of air transport such as reservation systems, aircraft handling, flight schedules, etc. and airport facilities should be further developed and improved all over the region. Main air-routes and so called "gateway" or "transit - airports" must receive first priorities.

6.8. Environment and tourism development

6.8.1. ECWA member States should follow and implement the measures foreseen within the framework of the World Tourism Organization (WTC)/United Nations Environment Programme (UNEP) joint declaration.

6.8.2 Bearing in mind that tourist exploitation puts high pressure on spatial resources, tourism authorities in the ECWA region should plan and carry out their tourism development policies according to the findings of an environmental cost/ benefit approach and/or Environmental Impact Assessment (EIA), thus maintaining an optimum ecological balance.

6.8.3. Tourism administrations in the ECWA region should actively participate in and contribute to all the measures aiming at protecting and improving of the natural, historical and human environment. Mechanisms of permanent consultation and co-ordination among the countries of the region should be created to avoid the negative environmental effect of unrestrained tourism development policy.

6.9. Other specific fields of tourism development

6.9.1. National tourism organizations, in co-operation with other authorities, should establish detailed and comprehensive statistics with view to balance of payments for the sector, and formulate an adequate import substitution policy. Data collected should allow for identifying the export and import components of the tourism sector. Various steps should be undertaken to promote and to develop local (or regional) industries for construction and building materials, technical and sanitary installations, furnishing, food and beverages, etc.

6.9.2. It is recommended that countries in the region should initiate the implementation of practical measures regarding all aspects of facilitations for tourists. Frontier formalities for the main in-bound tourism forms (business, pilgrimage, holiday) should be simplified and handled separately from other border cossing procedures.

6.9.3. It is recommended to designate appropriate number of trained, experienced national or local tourist guides, attached permanently to the most important tourist sites.

6.9.4. All over the ECWA region adequate entrance fees must be charged in all protected and organized archeological sites and historical tourist spots.

6.9.5. It is recommended that public authorities take the necessary steps to establish and to improve gift and handicraft centres in important tourist places. Closer co-operation at ECWA regional level could be established in order to improve the quality and the distribution of the products of regional handicraft.

6.9.6. While planning and constructing tourist infrastructure, facilities and amenities, tourist authorities should follow the guidelines established by the World Health Organization (WHO) concerning the sanitation in tourist establishments.

A N N E X E S

TOURISM STATISTICS BY COUNTRY

I. BAHRAIN :

Table I-1. Arrival of foreign visitors at frontiers (incl. transits) (1980 - 1981)

a) by month
b) by country

Table I-2. Arrivals and overnights of tourists in hotels. (1979 - 1981).

Table I-3. Arrivals of visitors (including transit passengers and excursionists) by entry points. (1978 - 1981)

Table I-4. Breakdown of foreign tourism by purpose of visit. (1980 - 1981).

Table I-5. Number of available rooms and beds in hotels (December 1981)

I. BAHRAIN

Table : I-1.

Arrivals of foreign visitors at frontiers
(incl. transits) (1980 - 1981)

(a) by month

Month	1980 Total number	1980 Relative Share %	1981 Total number	1981 Relative Share %	1981/1980 Variation %
January	30,616	8.1	32,194	7.6	5.1
February	30,179	7.9	33,086	7.8	9.6
March	32,886	8.6	35,165	8.3	6.9
April	30,865	8.1	32,633	7.8	5.7
May	29,796	7.8	32,449	7.7	8.9
June	33,995	9.0	36,076	8.5	6.1
July	28,965	7.6	25,326	6.0	-12.6
August	35,559	9.4	44,699	10.6	25.7
September	33,633	8.8	37,975	8.9	12.9
October	31,550	8.3	41,773	9.9	32.4
November	31,847	8.5	36,447	8.6	14.4
December	30,153	7.9	34,997	8.3	16.1
Total	380,044	100	422,820	100	11.3

(b) by country

Country of residence/ Nationality	1980 Number	1980 Relative share %	1981 Number	1981 Relative share %	1981/1980 Variation %
Arabs	143,568	37.7	169,415	40.1	18
Non-Arabs	236,476	62.3	253,405	59.9	7.2
Total	380,044	100	422,820	100	11.3

Source: Information supplied by the government in reply to the tourism questionnaire of the TCTD.

BAHRAIN

Table : I-2.

Arrivals and Overnights of Tourists in Hotels

	1979	1980	1981
Arrivals	308,099	374,697	315,970
Overnights	433,431	463,630	496,637

Source: Reply to the tourism questionnaire.

BAHRAIN

Table : I-3

Arrivals of visitors (incl. transit passengers and excursionists) by entry points (1978 - 1981)

Through	1978		1979		1980		1981	
	Number	%	Number	%	Number	%	Number	%
Sea Ports	46,757	9.6	52,382	10.4	53,061	10.5	60,292	10.8
Airport	438,119	90.4	449,690	89.6	453,743	89.5	496,201	89.2
Total	484,876	100	502,072	100	506,804	100	556,493	100

Source : Reply to the tourism questionnaire

BAHRAIN

Table : I-4

Breakdown of foreign tourism by purpose of visit
(1980 - 1981)

Purpose	1980 Arabs	1980 Total (incl. Arabs) Number	1980 Total (incl. Arabs) %	1981 Arabs	1981 Total (incl. Arabs) Number	1981 Total (incl. Arabs) %	1981/1980 % Variation
Tourism	121,978	150,048	39,5	144,280	175,784	41.8	17.8
Business and Trade	7,544	57,833	15.2	7,424	61,272	14.5	5.9
Transit	..	58,114	15.3	..	62,886	14.9	8.2
Work	9,444	91,530	24.2	9,560	96,419	22.8	5.3
Family visits	4,602	22,519	5.8	5,124	22,422	5.3	-0.4
Others	..	..	...	3,037	3,037	0.7	--
Total	143,568	380,044	100	169,415	422,820	100	11.3

Source : Reply to the tourism questionnaire

BAHRAIN

Table : I-5

Number of available rooms and beds in hotels (December 1981)

Category	Rooms		Beds		Suits	
	Number	%	Number	%	Number	%
Luxury	2,274	69.9	3,849	67.4	202	63.5
1st	846	26.0	1,651	28.9	116	36.5
2nd	134	4.1	210	3.7	..	..
Total	3,254	100	5,710	100	318	100

Source : Reply to the tourism questionnaire.

II. **EGYPT:**

Table II-1.	Arrivals of foreign tourists at frontiers (1979 - 1980) a) by month b) by country
Table II-2.	Nights spent by foreign tourists in hotels (by month) (1979 - 1980).
Table II-3.	Nights spent by foreign tourists in hotels (by nationality) (1979 - 1980).
Table II-4.	Arrivals of foreign tourists at frontiers and nights spent by foreign tourists in hotels, by groups of countries (1980 - 1981).
Table II-5.	Number of arrivals of foreign and domestic tourists in public sector hotels (by month) (1979).
Table II-6.	Number of arrivals of foreign and domestic tourists according to the region in public sector hotels (1979).
Table II-7.	Monthly room and bed occupancy in public sector hotels (1980).
Table II-8.	Tourist arrivals by modes of transport (1979).

II. EGYPT

Table : II-1

Arrivals of foreign tourists at frontiers

(a) by month (1979 - 1980)

Month	1979		1980		1980/1979 variation
	Total number	Relative share %	Total number	Relative share %	%
January	70,028	6.6	72,086	5.7	2
February	79,410	7.5	84,585	6.7	6
March	98,387	9.2	102,682	8.3	4
April	89,414	8.4	102,718	8.3	14.9
May	77,792	7.3	93,123	7.4	19.7
June	77,862	7.4	116,616	9.3	49.8
July	93,713	8.8	112,328	9.0	19.9
August	100,970	9.5	135,252	10.8	34
September	91,824	8.6	112,930	9.0	23
October	117,091	11.0	117,208	9.3	0.1
November	78,808	7.4	101,574	8.1	28.9
December	88,780	8.3	101,990	8.2	14.9
Total	1,064,079	100	1,253,097	100	17.8

(b) by country

Country of residence/ nationality	1979		1980		1980/1979 Variation
	Number	Relative share %	Number	Relative share %	%
Arabs	396,872	37.3	479,378	38.3	20.8
Non-Arabs	667,207	62.7	773,719	61.7	16.0
Total	1,064,079	100	1,253,097	100	17.8

Source: Statistical Bulletins published by the Ministry of Tourism, Cairo.

EGYPT

Table : II-2

Nights spent by foreign tourists in hotels

(by month) (1979 - 1980)

Month	1979		1980		1980/1979 Variation
	Total number	Relative share %	Total number	Relative share %	%
January	551,561	7.8	571,874	7.1	3.7
February	451,746	6.3	531,447	6.6	17.6
March	646,277	9.1	506,598	6.3	-21.6
April	503,622	7.1	580,084	7.2	15.2
May	503,410	7.1	584,156	7.2	16.0
June	616,269	8.7	632,792	7.8	2.7
July	707,152	9.9	648,238	7.9	- 8.3
August	621,633	8.7	959,590	11.9	54.4
September	697,380	9.8	897,223	11.1	28.7
October	636,625	9.0	745,052	9.2	17.0
November	665,704	9.4	789,012	9.8	18.0
December	503,002	7.1	637,624	7.9	26.8
Total	7,104,381	100	8,083,690	100	13.8

Source: Statistical Bulletins published by the Ministry of Tourism, Cairo.

EGYPT

Table : II-3

Nights spent by foreign tourists in hotels
(by nationality)

(1979 - 1980)

Country of nationality or residence	1979		1980		1980/1979 variation
	Number	Relative share %	Number	Relative share %	%
Arab countries	3,408,041	48	3,595,232	44.5	5.5
Non-Arab countries	3,696,340	52	4,488,458	55.5	21.4
Total	7,104,381	100	8,083,690	100	13.8

Source: Statistical bulletins published by the Ministry of Tourism, Cairo.

EGYPT

Table : II-4

Arrivals of foreign tourists at frontiers and nights spent by foreign tourists in hotels, by group of countries

(1980 - 1981)

Group of countries	Arrivals at frontiers					Nights in Hotels				
	1980	%	1981	%	1981/80 %	1980	%	1981	%	1981/80 %
Arab countries	479,378	38.2	578,786	42.1	7.2	3,595,232	44.5	4,636,612	47.3	29.1
O.E.C.D. countries	663,816	53.0	664,749	48.3	0.1	3,926,741	48.6	4,548,615	46.4	15.8
Socialist countries	23,618	1.9	22,250	1.6	-5.8	92,207	1.1	90,516	0.9	-1.8
Others	86,285	6.9	110,242	8.0	27.8	469,510	5.8	532,972	5.4	13.5
Total	1,253,097	100	1,376,027 1/	100	9.8	8,083,690	100	9,805,715 2/	100	21.3

1/ In 1982: 1.4 million

2/ In 1982: 9.1 million

Source: Ministry of Tourism, Cairo

EGYPT

Table : II-5

Number of arrivals of foreign and domestic tourists in public sector hotels (by month)

(1979)

Month	Egyptian	Foreigner	Total
January	4,309	49,695	54,004
February	4,011	61,740	65,751
March	3,890	81,508	85,398
Sub-Total	12,210	192,943	205,153
April	4,220	72,127	76,347
May	4,128	46,991	51,139
June	5,189	33,744	38,933
Sub-Total	13,557	152,862	166,419
July	5,925	44,002	49,927
August	5,891	47,874	53,765
September	4,639	69,351	73,990
Sub-Total	16,455	161,227	177,682
October	3,792	65,738	79,530
November	3,834	68,496	72,330
December	4,007	72,697	76,704
Sub-Total	11,633	216,931	228,564
Total	53,855	723,963	777,818 1/
% Distribution	6.9	93.1	100

1/ In 1980: 672,832 (48,939 Egyptian + 623,893 Foreign tourists).

Source: Statistical Bulletins published by the Ministry of Tourism, Cairo.

EGYPT

Table : II-6

Number of arrivals of foreign and domestic tourists according to region, in the public sector hotels (1979)

Month	Cairo	Alexandria	Aswan	Luxor	Total
January	34,288	4,108	9,543	6,065	45,004
February	35,825	3,874	11,373	14,679	65,751
March	46,105	5,353	12,967	20,973	85,398
Sub-Total	116,218	13,335	33,883	41,717	205,153
April	42,031	5,810	9,623	18,883	76,347
May	32,359	5,783	6,570	6,427	51,139
June	26,852	5,179	2,841	4,061	38,933
Sub-Total	101,242	16,772	19,034	29,371	166,419
July	30,719	8,361	4,158	6,689	49,927
August	32,190	6,980	5,609	8,986	53,765
September	47,868	5,513	7,553	13,056	73,990
Sub-Total	110,777	20,854	17,320	28,731	177,682
October	44,045	5,051	12,944	17,490	79,530
November	43,239	4,786	10,855	13,450	72,330
December	49,342	3,131	11,328	12,903	76,704
Sub-Total	136,626	12,968	35,127	43,843	228,564
Total	464,863	63,929	105,364	143,662	777,818
% Distribution	59.6	8.3	13.6	18.5	100

Source: Statistical Bulletins published by the Ministry of Tourism, Cairo.

EGYPT

Table : II-7

Monthly room and bed occupancy in the public sector hotels (1980) 1/

Month	Room occupancy	Bed occupancy
January	81.6	66
February	88.6	72.9
March	91.6	77.8
April	88.7	75.2
May	74	59
June	66.4	52.2
July	68.7	76
August	76	68.1
September	77	63.7
October	87.8	71.5
November	56.5	69.3
December	80.3	66
Annual Average	78.3 2/	62.5 3/

1/ Total hotel capacity public and private sectors) in 1978: 11,396 rooms/12,126 beds, in 1979: 21,827 rooms/24,073 beds, and in 1980: 29,664 beds. (in 1980 total accommodation capacity = 57,202 bed-places).

2/ in 1978: 80.6
in 1979: 78.2

3/ in 1978: 62.8
in 1979: 63

Source: Ministry of Tourism, Cairo.

EGYPT

Table : II-8

Tourist arrivals by modes of transport (1979)

G r o u p s	By air	By sea	By road	Total
Arab countries	348,416	7,435	41,021	396,872
O.E.C.D. countries	446,275	128,033	636	574,944
Socialist countries	17,564	13,784	42	31,390
Others	47,428	12,944	501	60,873
~~Total~~	~~859,683~~	~~162,196~~	~~42,200~~	~~1,064,079~~
% Distribution	80.8	15.2	4.0	100

Source: Statistical Bulletins published by the Ministry of Tourism, Cairo.

III. IRAQ:

IRAQ

Table: III-1

Arrivals of foreign visitors at frontiers (1980 - 1981)

a) by month

Month	1980		1981		1981/1980 variation
	Total number	Relative share %	Total number	Relative share %	%
January	126,773	10.4	73,485	4.7	- 42
February	140,011	11.5	69,718	4.5	- 50
March	118,875	4.7	83,701	5.4	- 29
April	121,614	10.0	102,267	6.5	- 16
May	110,991	9.0	123,544	8.0	+ 11
June	121,197	9.9	107,080	7.0	- 12
July	104,749	8.6	160,074	10.2	+ 53
August	124,218	10.2	170,451	11.0	+ 37
September	75,494	6.2	153,913	9.9	+104
October	35,880	2.9	157,009	10.0	+338
November	74,495	6.1	93,996	12.4	+143
December	67,457	5.5	168,996	10.8	+151
Total	1,221,754	100	1,564,234	100	+ 28

b) by country

Country of residence/ Nationality	1980		1981		1981/1980 variation
	Number	Relative share %	Number	Relative share %	%
Arabs	918,946	75.2	817,661	52.7	- 11.0
Non-Arabs	302,808	24.8	746,573	47.3	+146
Total	1,221,754	100	1,564,234	100	+ 28

Source: Reply by the government to the tourism questionnaire of the ECWA/TCTD.

IRAQ

Table: III-2

Arrivals of foreign tourists in hotels

a) by month (1979 - 1980)

Month	1979		1980		1980/1979 variation %
	Total Number	Relative share %	Total number	Relative share %	
January	88,243	7.9	98,860	8.6	12
February	85,288	7.6	99,556	8.7	17
March	95,321	8.6	105,547	9.2	11
April	84,621	7.6	101,235	8.8	20
May	86,089	7.7	99,632	8.7	16
June	91,817	8.2	106,658	9.3	16
July	97,279	8.7	104,750	9.1	8
August	94,391	8.4	110,332	9.6	17
September	89,973	8.1	98,007	8.5	9
October	97,246	8.7	77,458	6.7	20
November	102,418	9.2	72,233	6.3	29
December	101,452	9.1	75,827	6.5	25
Total	1,114,138	100	1,150,094	100	3.2

b) by country

Country of residence/ Nationality	1979		1980		1980/1979 variation %
	Total number	Relative share %	Total number	Relative share %	
Arabs	919,823	82.6	980,693	85.3	6.6
Non-Arabs	194,315	17.4	169,402	14.7	-2.8
Total	1,114,138	100	1,150,095	100	3.2

Source: Reply to the tourism questionnaire.

IRAQ

Table: III-3

Arrivals of domestic tourists in hotels

(by month)

(1979 - 1980)

Month	1979		1980		1980/1979 variation %
	Total number	Relative share %	Total number	Relative share %	
January	218,208	8.6	199,280	8.3	- 8.7
February	209,951	8.3	199,070	8.3	- 5.2
March	208,862	8.2	191,678	8.0	- 8.2
April	195,851	7.7	194,789	8.1	- 0.5
May	192,891	7.6	192,745	8.0	- 0.1
June	199,981	7.9	202,774	8.4	+ 1.4
July	225,303	8.9	217,736	9.1	- 3.4
August	219,917	8.7	227,389	9.5	+ 3.4
September	231,639	9.2	209,062	8.7	- 9.7
October	220,953	8.7	175,840	7.3	-20.4
November	204,326	8.1	195,001	8.1	- 4.5
December	203,662	8.1	197,586	8.2	- 3.0
Total	2,531,544	100	2,403,050	100	- 5.1

Source: Reply to the tourism questionnaire.

IRAQ

Table: III-4

Nights spent by foreign tourists in hotels
(by month)

(1979 - 1980)

Month	1979		1980		1980/1979 variation
	Total number	Relative share %	Total number	Relative Share %	%
January	728,715	7.8	1,093,387	8.1	36.8
February	741,273	7.3	1,072,161	7.9	44.6
March	837,666	8.2	1,177,618	8.7	40.5
April	810,530	7.9	1,170,640	8.7	44.4
May	814,659	8.0	1,199,624	8.9	47.2
June	814,329	7.9	1,178,161	8.7	44.6
July	832,998	8.2	1,190,214	8.8	42.8
August	832,877	8.2	1,194,674	8.8	43.4
September	832,577	8.2	1,174,444	8.7	41.0
October	926,723	9.0	1,077,085	7.9	16.2
November	946,209	9.3	1,000,335	7.4	5.7
December	1,021,214	10.0	1,004,416	7.4	1.6
Total	10,209,770	100	13,532,689	100	32.5

Source: Reply to the tourism questionnaire.

IRAQ

Table: III-5

Nights spent by foreign tourists in hotels

(by nationality or residence)

(1979 - 1980)

Country of nationality or residence	1979		1980		1980/1979 variation
	Number	Relative share %	Number	Relative share %	%
Arab countries	9,180,305	89.9	12,613,739	93.2	+37.4
Non-Arab countries	1,029,465	10.1	918,950	6.8	-10.7
Total	10,209,770	100	13,532,689	100	+32.5

Source: Reply to the tourism questionnaire.

IRAQ

Table: III-6

Total number of overnight in hotels

(1978 - 1980)

Year	Nights spent by foreign tourists	Nights spent by nationals or residents	Total
1978	6,144,725	8,595,280	24,740,005
1979	10,209,770	7,227,302	17,437,072
1980	13,532,689	6,447,010	19,979,699

Source: Reply to the tourism questionnaire.

IV. JORDAN

IV.- JORDAN

Table : IV-1

Arrivals of foreign visitors at frontiers

(by month) (1979 - 1980)

Month	1979		1980		1979/1980 variation
	Total number	Relative share %	Total number	Relative share %	%
January	82,276	6.8	96,523	6.5	+ 17
February	67,136	5.6	91,040	6.1	+ 36
March	110,560	9.2	112,417	7.6	+ 2
April	65,017	5.4	147,607	9.9	+127
May	93,241	7.8	120,482	8.1	+ 28
June	98,450	8.2	122,755	8.3	+ 25
July	110,475	9.2	131,624	8.9	+ 19
August	115,734	9.6	148,136	10.0	+ 28
September	109,815	9.1	137,096	9.2	+ 25
October	128,749	10.7	139,485	9.4	+ 8
November	110,396	9.2	97,940	6.6	- 11
December	110,453	9.2	141,705	9.5	+ 28
Total	1,203,002	100	1,486,310 1/	100	+ 24
Pilgrims	140,592	---	148,804	---	+ 6
G. Total	1,343,594	---	1,635,614 2/3/	---	+ 22
Arabs	963,246	80.1	1,155,934	77.8	+ 20
Non-Arabs	239,756	19.9	330,876	22.2	+ 38

1/ in 1981: 1,487,917

2/ in 1981: 1,580,601

3/ in 1982: 1,977,944 (84.69% Arabs)

Source: Reply by the Government to the tourism questionnaire of the TCTD.

JORDAN

Table : IV-2

Foreign visitors arrivals by modes of transport

(1977 - 1982)

Year	%	Rail	%	Road	%	Sea	%	Air	%	Total
1977	0.7	7,886	83.8	928,167	0.2	1,944	15.3	168,441	100	1,106,438
1978	0.7	8,362	79.4	940,527	0.5	5,278	19.4	230,105	100	1,184,272
1979	0.7	8,624	70.6	948,986	2.2	30,156	26.5	355,828	100	1,343,594
1980	1.0	16,966	72.9	1,192,585	1.9	31,765	24.2	395,294	100	1,635,614
1981	1.9	31,261	56.4	890,688	4.8	75,364	36.9	583,288	100	1,580,601
1982	0.6	12,686	56.7	1,120,728	14.4	284,150	28.3	560,386	100	1,977,944

Source: Reply to the tourism questionnaire.

JORDAN

Table : IV-3

Number of available rooms and beds in the registered accommodation establishments 1/

(1979 - 1980)

	1979		1980		Variation %	
	Rooms	Beds	Rooms	Beds	Rooms	Beds
5 Star Hotels	—	—	525	879	—	—
4 Star Hotels	—	—	1191	2383	—	—
3 Star Hotels	—	—	850	1686	—	—
2 Star Hotels	—	—	365	699	—	—
1 Star Hotels	—	—	212	399	—	—
Total Hotels	—	—	3243	6046	—	—
A category pensions	—	—	111	230	—	—
B category pensions	—	—	148	303	—	—
Total pensions (Boarding-houses)	—	—	259	533	—	—
Total Reg. Accomm.	2,952	5,582	3,502	6,579 2/	+19	+18

Source: Information supplied by the government in reply to the tourism questionnaire of the TCTD.

1/ 4.088 workers in hotel industry (in 1982).

2/ in 1981: 4416 rooms (8477 beds).
in 1982: 5151 rooms (9555 beds).

V. <u>KUWAIT</u> :

V. KUWAIT

Table : V-1

Arrivals and nights by foreign and domestic tourists in registered hotels (by hotel category) (1980 - 1981)

Hotels		1980		1981		1981/1980 %	
No.	Category	Arrivals	Nights	Arrivals	Nights	Arrivals	Nights
6	Luxury	48,469	181,803	63,995	266,930	32	46.8
10	1st Class	23,304	100,060	32,229	113,591	38.3	13.5
5	2nd Class	25,537	65,406	23,328	69,643	- 8.7	6.5
2	3rd Class	10,610	27,721	7,984	20,874	-25	-25
23	Total	107,920	374,990	127,536	471,038	18.2	25.6

Notes :

1. During the first four months of 1982, arrivals: 48,543 and nights: 192,205; 9.8% and 21.5% increase over the same period of 1981, respectively.

2. Visitors arrivals at frontiers (including 287,676 Kuwaitis) in 1981: 1,474,845. By land: 1,037,265, by sea: 7,034 and by air : 430,546.

   Kuwaiti arrivals; by land: 195,660, by sea: 145 and by air: 91,871.
   Foreign arrivals; by land: 841,605, by sea: 6,889 and by air: 338,675

Source: Annual statistical abstract, 1981, State of Kuwait, Ministry of Planning, Central Statistical Office, Kuwait 1982, and monthly digest of statistics, December 1982.

KUWAIT

Table : V-2

Arrivals and nights by foreign and domestic tourists in registered hotels (by month) (1980)

Months	Total		Non-Arab Foreigners		Arabs		Kuwaitis	
	Nights	Arrivals	Nights	Arrivals	Nights	Arrivals	Nights	Arrivals
January	36,493	9,289	20,072	4,434	16,251	4,813	170	42
February	38,080	10,497	20,328	5,040	17,619	5,431	130	26
March	36,550	10,668	22,106	5,718	14,405	4,927	39	23
April	35,283	9,753	18,831	4,905	16,374	4,817	78	31
May	32,327	9,093	19,252	4,799	13,002	4,262	73	32
June	32,106	8,979	19,970	4,675	12,067	4,272	69	32
July	28,124	8,481	15,275	3,491	12,793	4,973	56	17
August	25,960	8,544	13,701	3,520	12,174	4,988	85	36
September	31,237	8,970	18,524	4,541	12,662	4,405	51	24
October	20,485	6,457	11,720	3,040	8,610	3,359	155	58
November	25,857	8,090	12,590	4,334	13,163	3,700	104	56
December	32,488	9,099	17,166	4,051	15,169	4,981	153	67
Total	374,990	107,920	209,535	52,548	164,289	54,928	1,166	444
Percentage	100,00	100.00	55.88	48.69	43.81	50.90	0.31	0.41

Source : Annual statistical abstract 1981, Kuwait 1982

KUWAIT

Table : V-3

Number of available rooms and beds in registered hotels (1980)

Category	Rooms		Beds		No. of Establishment
	Number	%	Number	%	
Luxury	1,819	66.6	2,742	64.5	6
1st Class	706	25.8	1,082	25.5	10
2nd Class	160	5.9	314	7.4	5
3rd Class	47	1.7	111	2.6	2
Total	2,732	100	4,249	100	23

Source: Annual statistical abstract, 1981, Kuwait 1982.

KUWAIT

Table : V-4

Annual room and bed occupancy by category in registered hotels

(1980)1/

Category	Room Occupancy	Bed Occupancy
Luxury	27.4	24.9
1st Class	38.8	25.3
2nd Class	..	57.1
3rd Class	..	68.4
Total	37.6	24.2

1/ Calculated by the ECWA/TCTD on the basis of previous tables.

KUWAIT

Table : V-5

Number of persons employed in hotels and other accommodation establishments

(1979)

Category	Management level	High level	Medium level	Basic level	Apprentice	total	Ratio	
							room	bed
Luxury	8	54	299	723	192	1,276	1.4	1.1
1st Class	17	41	136	380	145	719	1.1	0.7
2nd Class	-	4	5	56	26	91	0.5	0.3
3rd Class	-	-	1	10	5	16	0.2	0.2
Unlicensed hotels	-	3	9	31	14	57	1.1	0.7
Serviced Appartments	1	4	18	65	30	118	0.5	0.3
Totals	26	106	468	1,265	412	2,277	1.1	0.7
% Distribution	1.1	4.7	20.6	55.5	18.1	100		

Source : UNDP Kuwait

VI - LEBANON :

LEBANON

Table : VI-1.

Arrivals of guests in Beirut hotels 1/
by month (1979 - 1980)

Month	1979	1980	Variation 1979/1980 %
January	8,489	12,627	+ 49
February	7,334	9,901	+ 35
March	8,890	10,000	+ 12
April	9,368	9,803	+ 5
May	9,732	9,688	- 1
June	10,479	13,664	+ 30
July	10,560	10,867	+ 3
August	10,560	12,229	+ 16
September	10,863	10,641	- 2
October	10,932	12,314	+ 13
November	10,353	11,023	+ 6
December	10,332	12,791	+ 24
Total	117,892	135,548	+ 15

1/ 62 hotels

Source : National Council of Tourism in Lebanon, (NCTL)

LEBANON:

Table : VI-2.

Arrivals of guests in registered hotels (1965-1981)

Year	Hotels in Beirut 2/			Accommodation establishments on the coast 3/		
	arrivals	overnights	average length of stay (day)	arrivals	overnights	average length of stay (day)
1965	(391,780) 1/	1,234,719	(3.2) 1/	12,500	105,614	8.4
1966	432,977	1,370,451	3.2	22,270	111,593	5.0
1967	346,519	1,083,941	3.1	17,941	75,643	4.2
1968	433,590	1,466,850	3.4	24,262	144,560	6.0
1969	404,926	1,361,706	3.4	16,724	72,232	4.3
1970	404,370	1,368,015	3.4	11,425	40,758	3.6
1971	508,434	1,725,229	3.4	15,479	69,287	4.5
1972	550,137	1,900,580	3.5	14,648	93,699	6.4
1973	496,344	1,804,213	3.6	17,423	64,631	5.2
1974	645,669	2,307,122	3.6	17,423	83,740	4.8
1975	(467,000) 1/	(1,560,000) 1/	(3.3) 1/	-	-	-
1976	-	-	-	-	-	-
1977	121,700	416,401	3.4	8,262	41,098	5.0
1978	109,338	411,735	3.8	8,606	62,705	7.3
1979	117,892	469,049	4.0	17,492	111,395	6.4
1980	135,548	585,531	4.3	20,215	109,612	5.4
1981	133,615	595,019	4.5	..	..	..

Notes : 1/ estimates.
2/ 62 hotels.
3/ 6 establishments.

Source : National Council of Tourism in Lebanon, (NCTL).

LEBANON:

Table : VI-3

A comparison of arrivals and overnights of guests in Beirut-hotels 1/ (1979/1974)

Month	Arrivals			Overnights			Average length of stay (day)	
	1974	1979	1979/1974	1974	1979	1979/1974	1974	1979
January	54,840	8,489	(-85%)	195,940	33,537	(-83%)	3.7	4.0
February	49,509	7,324	(-85%)	177,062	29,857	(-83%)	3.6	4.1
March	54,840	8,890	(-85%)	195,940	35,212	(-82%)	3.6	4.0
April	53,070	9,368	(-82%)	189,620	36,161	(-81%)	3.5	3.9
May	54,840	9,558	(-83%)	195,940	37,338	(-81%)	3.5	3.9
June	53,070	10,479	(-80%)	189,620	39,883	(-79%)	3.5	3.8
July	54,840	10,560	(-81%)	195,940	58,300	(-70%)	3.9	5.5
August	54,840	10,560	(-81%)	195,940	38,597	(-80%)	3.7	3.7
September	53,070	10,863	(-80%)	189,620	39,945	(-79%)	3.5	3.7
October	54,840	10,932	(-80%)	195,940	39,147	(-80%)	3.4	3.6
November	53,070	10,353	(-80%)	189,620	40,504	(-79%)	3.5	3.9
December	54,840	10,332	(-81%)	195,940	40,102	(-80%)	3.4	3.9
Total	645,669	117,892	(-82%)	2,307,122	469,049	(-80%)	3.6	4.0

1/ 62 hotels.

Source : NCTL.

LEBANON

Table : VI-4

Passengers traffic at the Beirut International Airport

(1979 - 1980)

Passengers activity	1 9 7 9	1 9 8 0	1980/1979 change %
Arrivals	699,221	764,686	+ 9.4
Departures	741,106	788,445	+ 6.4
Transits	118,202	109,057	- 8
Total	1,558,529	1,662,188	+ 6.6

Source : General Directorate for Civil Aviation, Beirut.

VII. <u>OMAN:</u>

Table VII-1. Arrivals of foreign tourists at frontiers (by air only) (1978-1979).

Table VII-2. Arrivals of foreign tourists in hotels (1979-1980).
a) by month
b) by country

Table VII-3. Number of foreign tourists arrivals by category of hotels and by purpose of visit (1979-1980).

Table VII-4. Total number of overnights in hotels (1979-1980).

Table VII-5. Nights spent by foreign tourists in hotels (by month) (1979-1980).

Table VII-6. Nights spent by foreign tourists in hotels (by country) (1979-1980).

Table VII-7. Number of nights spent by foreign tourists in hotels (1979-1980).

Table VII-8. Arrivals of domestic tourists in hotels (by month) (1979-1980).

Table VII-9. Number of arrivals of domestic tourists and residents in hotels by category (1979-1980).

Table VII-10. Number of nights spent by domestic tourists and residents in hotels (1979-1980).

Table VII-11. Number of available rooms and beds in hotels (1979-1980).

Table VII-12. Employment in tourism sector (1980).

OMAN

Table: VII-1

Arrivals of foreign tourists at frontiers

(by air only)

(1978 - 1979)

Country group	1978		1979		1979/78 % variation
	Number	%	Number	%	
Arabs	113,500	65	127,858	64	12.6
Non-Arabs	60,622	35	70,204	36	15.8
Total	174,122	100	198,260	100	13.7

Source: Information supplied by the government in reply to the tourism questionnaire of the TCTD.

OMAN

Table: VII-2

Arrivals of foreign tourists in hotels

a) by month

Month	1979		1980		1980/1979 variation %
	Total number	Relative share %	Total number	Relative share %	
January	5,090	8.2	5,148	7.2	.. 1.1
February	5,107	8.3	5,975	8.3	17.0
March	6,578	10.6	6,177	8.6	- 6.1
April	5,185	8.4	5,030	8.4	16.3
May	5,340	8.6	5,957	8.3	11.5
June	4,666	7.5	5,868	8.2	25.8
July	4,491	7.3	5,093	7.0	13.4
August	3,843	6.2	4,599	6.4	19.7
September	4,460	7.3	5,651	7.9	26.7
October	5,607	9.1	6,097	8.5	8.7
November	5,323	8.6	8,057	11.2	51.4
December	6,112	9.9	7,194	10.0	17.7
Total	61,802	100	71,846	100	16.2

b) by country

Country of residence/ Nationality	1979		1980		1980/1979 variation %
	Number	Relative share %	Number	Relative share %	
Arabs	10,102	16.4	13,610	19	34.7
Non-Arabs	51,700	83.6	58,236	81	12.7
Total	61,802	100	71,846	100	16.2

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-3

Number of foreign tourists arrivals by category of hotels and by purpose of visit

(1979 - 1980)

Arrivals in	1979	1980	1980/1979 % variation
Luxury hotels	35,270	46,213	31
1st Class	21,370	21,546	0.8
2nd Class	4,794	3,695	-23
3rd Class	368	392	6.5
Total	61,802	71,846	16.2
Business	61,005	70,971	16.3
Holiday and family visits	797	875	9.8

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-4

Total number of overnights in hotels

Year	Nights spent by foreign tourists	Nights spent by nationals or residents	Total 1/
1979	228,715	28,772	257,487
1980	262,203	37,460	229,663

1/ Average length of stay in hotels in 3.6 nights.

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-5

Nights spent by foreign tourists in hotels

(by month)

(1979 - 1980)

Month	1979		1980		1980/1979 variation %
	Total Number	Relative share %	Total Number	Relative share %	
January	18,696	8.2	19,026	7.2	1.8
February	18,855	8.2	21,793	8.3	15.6
March	24,119	10.5	22,106	8.4	- 8.3
April	20,248	8.8	21,264	8.1	5.0
May	20,927	9.1	22,101	8.4	5.6
June	17,096	7.5	20,962	8.0	22.6
July	16,246	7.1	17,581	6.7	8.2
August	13,832	6.1	15,771	6.0	14.0
September	16,386	7.2	20,368	7.8	24.3
October	21,214	9.2	22,570	8.6	6.4
November	19,157	8.5	31,527	12.0	64.6
December	21,939	9.6	27,134	10.5	23.7
Total	228,715	100	262,203	100	14.6

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-6

Nights spent by foreign tourists in hotels

(by country)

(1979 - 1980)

Country of nationality or residence	1979 Total number	1979 Relative share %	1980 Total number	1980 Relative share %	1980/1979 variation %
Arab countries	38,310	16.7	53,657	20.5	40
Non-Arab countries	190,405	83.3	208,546	79.5	9.5
Total	228,715	100	262,203	100	14.6

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-7

Number of nights spent by foreign tourists in hotels

(1979 - 1980)

Nights spent in: / Hotels (categories)	1979	1980	1980/1979 %
Luxury	123,443	161,741	31.0
1st	84,986	84,300	- 0.9
2nd	18,630	14,496	-22.2
3rd	1,656	1,666	0.6
Total	228,715	262,203	14.6

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-8

Arrivals of domestic tourists in hotels

(1979 - 1980)

Month	1979		1980		1979/1980 variation
	Total number	Relative share %	Total number	Relative share %	%
January	459	5.9	650	6.0	41.6
February	517	6.5	713	6.6	37.9
March	671	8.5	1,283	11.9	91.2
April	722	9.1	747	6.9	3.5
May	910	11.5	629	5.8	-30.9
June	541	6.8	984	9.1	81.9
July	709	8.9	663	6.1	- 6.5
August	527	6.6	744	6.9	41.2
September	530	6.7	904	8.4	70.6
October	744	9.4	1,126	10.4	51.3
November	738	9.3	1,427	13.2	93.4
December	847	10.9	921	8.7	8.7
Total	7,916	100	10,791	100	36.4

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-9

Number of arrivals of domestic tourists and residents in hotels (by category)

(1979 - 1980)

Arrivals in: Hotels (categories)	1979	1980	1980/1979 %
Luxury	3,357	5,087	51.3
1st	1,855	1,689	- 9
2nd	2,473	3,768	52.3
3rd	231	247	7
Total	7,916	10,791	36.4

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-10

Number of nights spent by domestic tourists and residents in hotels

(1979 - 1980)

Nights spent in: / Hotels (categories)	1979	1980	1980/1979 %
Luxury	11,747	17,801	51.5
1st	5,515	4,646	-16
2nd	7,549	10,839	43.6
3rd	3,961	4,174	5.4
Total	28,772	37,460	30.2

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-11

Number of available rooms and beds in hotels

(1979 - 1980)

Categories	Rooms		Beds		Annual occupancy % 1/	
	1979	1980	1979	1980	1979	1980
Luxury	259	253	518	506	43.7	57.4
1st class	460	460	637	637	62.4	61.0
2nd class	67	67	134	134	36.0	53.2
3rd class	13	13	32	32	50.0	50.0
Total	799	793	1,321	1,309	48.0	55.5

Note: 1/ Data given by the hotels, covering room or bed occupancy.

Source: Reply to the tourism questionnaire.

OMAN

Table: VII-12

Employment in tourism sector

(1980)

Category	Male workers (A)	Female workers (B)	Total (A + B)	Foreign workers
Hotel industry				
peak season / off season } 8 Hotels	1,123	16	1,139	1,046
Catering industry	..	..	..	..
Travel trade				
Travel agencies				
Tourist guides -interpreters-	..	..	664	522
Public administration of tourism (National, regional, local)	8	..	8	5
Other indirect employment				
Bank	..	..	1,455	724
Shopping establishments	..	..	..	..
Handicrafts	..	..	..	..
Folklore	..	..	..	..
Drivers and other local transport enterprises	..	..	3,154	1,471

Source: Reply to the tourism questionnaire.

VIII. PDRY

PDRY

Table: VIII-1

Registered hotel capacity and
tourist nights

(1979-1980)

	1979	1980
Total number of hotels	17	18
Total number of bed-places	919	1171
Tourist nights spent (in Aden only)	76,000	79,000

Source: Central Statistical Organization, Aden.

PDRY

Table: VII-2

International tourist payments

(in millions of US$)

(1977 - 1981)

	1977	1978	1979	1980	1981 1/
International tourism receipts	1	2	1	4	4
International tourism expenditure	4	4	5	8	10

1/ estimates.

Source: WTO, World tourism statistics, Madrid 1982.

IX. QATAR:

QATAR

Table: IX-1

Passenger traffic in Doha International Airport

(1977-1979)

Passenger	1977	1978	1979	1978/77 %	1979/78 %
Arrivals	262,931	291,081	286,707	10.7	- 1.5
Transit	212,275	225,382	277,030	6.2	22.9

Source: Information supplied by the government in reply to the tourism questionnaire of the TCTD.

QATAR

Table: IX-2

Total tourist arrivals and nights in registered hotels by nationality

(by month)

(1981)

Nationality / Months	Arabs		Non-Arabs		Total	
	Arrivals	Nights	Arrivals	Nights	Arrivals	Nights
January	1745	6719	4858	15417	6603	22136
February	2108	8273	5283	17187	7391	25460
March	2477	11134	5532	19095	8009	30224
April	2350	10460	5669	20391	8019	30851
May	2514	10107	5364	19093	7878	29200
June	3008	13374	5165	22647	8173	36021
July	2300	8851	4335	17543	6635	26394
August	3200	11952	4937	19667	8137	31619
September	3524	14515	6929	25862	10453	40377
October	3877	18939	9352	28722	13229	47661
November	3882	19745	8623	32660	12505	52405
December	3966	18791	7848	29014	11814	47805
Total	34951	152860	73895	267298	108846	420158
% Share	32.1	36.4	67.9	63.6	100	100

Source: State of Qatar, Central Statistical Organization, Annual Statistical Abstract - 1981, July 1982.

QATAR

Table: IX-3

Total tourist arrivals and nights in registered hotels (by category)

(1981)

Category	Hotels	Arrivals	Nights
Luxury	3	91,544	326,446
First	1	1,150	12,259
Second	2	6,325	40,331
Third	1	1,916	12,356
Fourth	2	1,740	10,527
Unclassified	6	6,171	18,239
Total	15	108,846	420,158

Source: Annual Statistical Abstract, 1982

QATAR

Table: IX-4

Tourist accommodation capacity

(1980 - 1981)

Item \ Category	Luxury and 1st class		2nd and 3rd class		4th class and others		Total	
Years	1980	1981	1980	1981	1980	1981	1980	1981
Hotels	5	4	4	3	6	8	15	15
Rooms	..	874	..	197	..	164	..	1235
Bed-places	1106	1119	310	359	226	358	1642	1836

Source: Annual Statistical Abstracts, 1981 and 1982.

X. SAUDI ARABIA:

Table X-1. Implementation status of the hotel construction plan (end of 1982).
a) by region
b) by category

Table X-2. Distribution of the existing hotel capacity by region, (1982).

Table X-3. Hotels under construction, (1982).
a) by region
b) by category.

Table X-4. Number of pilgrims from abroad, (1975-1982).

Table X-5. Number of pilgrims from abroad by group of countries, (1981-1982).

Table X-6. Number of pilgrims from abroad by main country of origin, (1981-1982).

Table X-7. Number of pilgrims from abroad by mode of arrival, (1981-1982).

Table X-8. Distribution of the total number of pilgrims (1982).

SAUDI ARABIA

Table: X-1

Implementation status of the hotel construction plan

(Situation at the end of 1982)

a) by region

Region	Existing hotels		Hotels Under Construction		Total		Planned	
	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms
Riyadh	34	4298	14	2062	48	6360	44	5600
Jeddah	48	5586	16	3098	64	9184	44	5600
Eastern Region	37	3888	11	2303	48	6191	45	5900
Mecca	28	2284	6	959	34	3243	19	2100
Medina	45	2800	12	1826	57	4626	19	2100
Taif	15	620	10	731	25	1351	13	1500
Southern Region	15	773	15	871	30	1644	26	1450
Other regions	18	1014	18	1783	36	2797	52	2950
Total	240	21263	102	14133	342	35396	262	27200

b) by category

Category	Existing Hotels			Hotels Under Construction		Total		Planned	
	Nr.	Rooms	%	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms
Luxury	13	3549	17	3	1108	16	4657	16	4800
1st Class	36	6640	31	31	7204	67	13844	61	9250
2nd Class	88	6826	32	67	5791	155	12617	185	13150
3rd Class	103	4248	20	1	30	104	4278	-	-
Total	240	21263	100	102	14133	342	35396	262	27200

Source : Ministry of Commerce, Hotels Management Department, Hotel Survey, Riyadh 1982.

SAUDI ARABIA

Table: X-2

Distribution of the existing hotel capacity by region
(1982)

Region	Luxury class		1st class		2nd class		3rd class		Total	
	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms
Riyadh	2	604	11	2226	10	963	11	505	34	4298
Jeddah	3	1167	8	1905	23	1922	14	592	48	5586
Eastern Region	4	1123	7	1217	19	1387	7	161	37	3888
Mecca	1	173	-	-	10	1123	17	988	28	2284
Medina	1	192	3	375	10	792	31	1441	45	2800
Taif	2	290	-	-	5	137	8	193	15	620
Southern region	-	-	4	437	5	178	6	158	15	773
Other regions	-	-	3	480	6	324	9	210	18	1014
Total	13	3549	36	6640	88	6826	103	4248	240	21263

Source : Ministry of Commerce, Hotels Management Department, Hotel Survey, Riyadh 1982.

SAUDI ARABIA

Table : X-3

Hotels under construction

(1982)

a) by region

Region	Completed Projects (Soft opening)		Ongoing Projects		Projects in initial phase		Completed Projects (rented)		Total	
	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms
Riyadh	3	616	5	696	2	288	4	462	14	2062
Jeddah	1	185	4	1135	9	1748	2	530	16	3098
Eastern Region	1	-	5	768	5	1265	1	270	11	2303
Mecca	-	-	6	959	-	-		-	6	959
Medina	2	506	4	674	6	646	-	-	12	1826
Taif	-	-	2	252	8	479	-	-	10	731
Southern Region	1	234	5	259	9	378	-	-	15	871
Other regions	-	-	6	385	10	898	2	500	18	1783
Total	7	1541	37	5128	49	5702	9	1762	102	14143

b) by category

Category	Completed projects (Soft opening)		Ongoing projects		Projects in initial phase		Completed Projects (rented)		Total	
	Nr	Rooms	Nr.	Rooms	Nr.	Rooms	Nr.	Rooms	Nr.	Room
Luxury	-	-	-	-	2	658	1	450	3	1108
First Class	4	1091	14	3282	8	1797	5	1034	31	7204
Second Class	3	450	22	1816	39	3247	3	278	67	5791
Third Class	-	-	1	30	-	-	-	-	1	30
Total	7	1541	37	5128	49	5702	9	1762	102	14143

Source : Ministry of Commerce, Hotels Management Department, Hotel Survey, Riyadh 1982.

SAUDI ARABIA

Table : X-4.

Number of pilgrims from abroad

(1975 - 1982)

Year	Number	Chain index	Variation over the previous year (%)
1975	894,573	100	-
1976	719,040	80.4	-19.6
1977	739,319	102.8	+ 2.8
1978	830,236	112.3	+11.2
1979	862,520	103.9	+ 3.9
1980	812,892	94.2	- 5.8
1981	879,368	108.2	+ 8.2
1982	853,555	97.1	- 2.9

Source : 1) The Middle East and North Africa, 1982-83, Europa Publ. Ltd., 29th Edition, London 1982.

2) Ministry of Interior, Statistical Section, Pilgrims Statistics, Jeddah 1982.

SAUDI ARABIA

Table : X-5.

Number of pilgrims from abroad by group of countries (1981 - 1982)

Origin of pilgrims	1 9 8 1	1 9 8 2	1982/1981 Variation %
Arab Countries	418,026	396,882	- 5.1
Non-Arab Asian Countries	322,621	341,159	+ 5.7
Non-Arab African Countries	132,997	110,320	-17.1
European Countries	4,809	4,220	- 2.3
American Countries	776	770	- 0.8
Other Countries	139	204	+46.8
Total	879,368	853,555	- 2.9

Source : Ministry of Interior, Statistical Section, Pilgrims Statistics, Jeddah 1982.

SAUDI ARABIA

Table : X-6.

Number of pilgrims from abroad by main country of origin (1981-1982)

Nationality	1 9 8 1	1 9 8 2	1982/1981 Variation %
1. Egypt	83,907	98,408	+ 17.3
2. Iran	75,391	89,503	+ 18.7
3. Nigeria	100,300	81,128	- 9.1
4. Pakistan	69,343	72,844	+ 5
5. Yemen Arab Republic	57,085	63,241	+ 10.8
6. Indonesia	69,002	57,478	- 6.7
7. Turkey	37,042	43,788	+ 18.2
8. Algeria	37,590	40,400	+ 7.5
9. Syria	37,547	27,890	- 25.7
10. Sudan	26,635	26,983	+ 5.3
11. India	26,280	26,229	- 0.2
12. Jordan	25,229	25,429	+ 7.9
13. Malaysia	22,704	25,277	+ 11.3
14. Iraq	40,877	23,179	- 43.3
15. Morocco	21,013	18,686	- 1.1
16. Libya	24,859	17,787	- 28.5
17. Bangladesh	11,296	12,858	+ 8.5

Source : Ministry of Interior, Statistical Section, Pilgrims Statistics, Jeddah 1982.

SAUDI ARABIA

Table: X-7.

Number of pilgrims from abroad by mode of arrival (1981 - 1982)

Arrival by	1 9 8 1	1 9 8 2	1982/1981 Variation %
Air	649,224	623,425	- 4
Sea	56,668	55,735	- 1.7
Road	173,476	174,395	+ 0.5
Total	879,368	853,555	- 2.9

Source : Ministry of Interior, Statistical Section, Pilgrims Statistics, Jeddah 1982.

SAUDI ARABIA

Table : X-8.

Distribution of the total number of pilgrims
(1982)

Origin	Saudis	Non-Saudis	Total
From inside the Saudi Arabia	238,985	919,015	1,158,000
From abroad	-	853,555	853,555
Total	238,985	1,772,570	2,011,555

Source : Ministry of Finance and National Economy, Department of Statistics, Pilgrimage Statistics for 1982.

XI. SYRIA:

SYRIA

Table: XI-1

Arrivals of foreign visitors at frontiers

(by country group)

(1979-1981)

Visitors	1979	Relative share %	1980	Relative share %	1981	Relative share %	1981/1980 %
Arabs	1,056,845	80.1	971,207	81.9	805,614	74.9	-17.1
Non-Arabs	250,530	19.9	214,099	18.1	269,456	25.5	+25.9
Total	1,307,375	100	1,185,306	100	1,075,100	100	- 9.3

Source: Syrian Arab Republic, Central Bureau of Statistics, Statistical Abstract, 1982.

SYRIA

Table: XI-2

Arrivals of foreign visitors at frontiers

(by month)

(1981)

Month	Arabs	Non-Arabs	Total	Relative share %
January	40,647	17,890	58,537	5.4
February	41,769	19,870	61,639	5.8
March	44,922	18,928	63,850	5.9
April	81,707	13,243	94,950	9.0
May	65,634	7,279	72,913	6.8
June	73,318	6,807	80,125	7.4
July	76,513	19,660	96,173	9.0
August	90,761	18,473	109,234	10.1
September	92,167	17,698	109,865	10.2
October	62,949	57,433	120,382	11.1
November	61,417	53,976	115,393	10.7
December	73,810	18,229	92,039	8.6
Total	805,614	269,486	1,075,100	100

Source: Statistical Abstract, 1982.

SYRIA

Table: XI-3

Foreign visitors arrivals by modes of transport

(1981)

Visitors	Air	Sea	Land	Total
Arabs	53,344	13,490	738,780	805,614
Non-Arabs	53,050	18,259	198,177	269,486
Total	106,394	31,749	936,957	1,075,100
% Share	10.0	2.9	87.1	100

Source: Statistical abstract, 1982.

SYRIA

Table: XI-4

Arrivals of foreign tourists in registered hotels

(by month)

(1981)

Months	Arabs	Non-Arabs	Total	Relative share %
January	22,455	8,289	30,744	7.0
February	20,032	8,638	28,670	6.6
March	23,106	9,477	32,583	7.4
April	26,694	9,732	36,426	8.3
May	28,840	6,188	35,028	8.0
June	28,152	5,938	34,090	7.8
July	32,268	12,557	44,825	10.2
August	39,294	11,142	50,436	11.6
September	30,935	11,386	42,321	10.0
October	25,062	10,408	35,470	8.1
November	23,635	10,498	34,133	7.8
December	21,544	9,742	31,286	7.2
Total	322,017 (73.8)	113,995 (26.2)	436,012 (100)	100

Source: Statistical Abstract, 1982.

SYRIA

Table: XI-5

Arrivals of foreign tourists in registered hotels

(by hotel category)

(1981)

Hotel categories	Arabs	Non-Arabs	Total
Five Star	29,408	19,552	48,960
Deluxe	20,839	16,250	37,089
1st	18,742	17,780	36,522
2nd	86,078	32,915	118,993
3rd	146,439	25,256	171,695
Hostel	20,511	2,242	22,753
Total	322,017	113,995	436,012 1/

1/ In addition to this figure in 1981, there were 1,092,980 domestic tourist arrivals in registered hotels.

Source: Statistical Abstract, 1982.

SYRIA

Table: XI-6

Nights spent by foreign tourists in registered hotels

(by month)

(1981)

Months	Arabs	Non-Arabs	Total	Relative share %
January	76,891	27,757	104,648	6.6
February	88,365	42,512	130,877	8.2
March	83,708	67,772	151,480	9.5
April	77,908	36,912	114,820	7.2
May	84,804	37,904	122,708	7.7
June	98,829	40,742	139,571	8.8
July	126,923	42,764	169,687	10.7
August	127,935	34,758	162,693	10.2
September	103,722	40,536	144,258	9.0
October	81,821	47,744	129,565	8.1
November	75,220	41,744	116,956	7.3
December	69,305	35,762	106,067	6.7
Total	1,095,431 (68.7)	497,899 (31.3)	1,593,330 (100)	100

Source: Statistical Abstract, 1982.

SYRIA

Table: XI-7

Nights spent by foreign tourists

(by hotel category)

(1981)

Hotel categories	Arabs	Non-Arabs	Total
Five Star	46,989	81,283	128,272
Deluxe	46,891	68,106	114,997
1st class	49,917	69,550	119,467
2nd class	282,758	128,427	411,185
3rd class	610,321	140,928	751,249
Hostel	58,555	9,605	68,160
Total	1,095,431	497,899	1,593,330

Source: Statistical Abstract, 1982.

SYRIA

Table: XI-8

Foreign and domestic tourist nights spent in hotels and similar establishments

(by month)

(1980 - 1981)

Months	1980	%	1981	%	1981/1980
January	263,251	8.77	245,904	7.98	- 6.6
February	249,661	8.32	248,017	8.05	- 0.7
March	256,019	8.53	285,810	9.27	11.6
April	231,412	7.71	238,151	7.73	2.9
May	232,932	7.76	239,244	7.76	2.7
June	244,126	8.14	274,796	8.92	12.6
July	244,416	8.15	292,809	9.50	19.8
August	276,287	9.21	328,706	10.67	19.0
September	253,723	8.46	296,387	9.62	16.8
October	252,317	8.41	259,595	8.42	2.9
November	246,203	8.20	243,344	7.90	- 1.2
December	250,353	8.34	129,236	4.19	-48.4
Total 1/	3,000,700	100.00	3,081,999	100.00	2.7

1/ in 1980: 1,463,785 domestic and 1,536,915 foreign tourist nights.
in 1981: 1,589,166 domestic and 1,492,833 foreign tourist nights.

Source: WTO, World Tourism Statistics, Madrid, 1982. and reply by the Government to the Tourism Questionnaire of the TCTD.

SYRIA

Table: XI-9

Hotel accommodation capacity

(1979 - 1981)

Categories	1979		1980		1981	
	Number	Beds	Number	Beds	Number	Beds
Five Star	2	1,100	2	1,100	4	2,398
Deluxe	5	818	8	1,252	9	1,318
1st	7	867	10	1,020	19	1,640
2nd	45	2,894	63	3,566	73	4,150
3rd	365	13,191	330	10,809	294	10,348
Hostel	109	1,973	110	1,964	89	1,757
Total	533	20,843	523	19,711	488	21,611

Source: Statistical Abstract, 1982.

XII. UAE:

U.A.E.

Table: XII-1

Hotel development in the UAE
(1975 - 1980)

Year	Number of hotels	Number of rooms	Arrivals in hotels	Annual average occupancy rate %
1975	33	2,420	183,000	82%
1980	83	9,222	532,000	42%

Source: Ministry of Planning, Abu Dhabi.

U. A. E.

Table: XII-2

Number of registered hotel rooms in the U.A.E.

(1975 - 1981)

Location	December 1975	December 1977	July 1979	April 1981
Abu-Dhabi	781	1,049	1,553	2,940
Dubai	1,336	1,671	2,752	4,610
Sharjah	258	506	1,311	2,285
Other	45	69	236	331
Total	2,420	3,295	5,852	10,166

Source : Ministry of Planning, Abu-Dhabi

U. A. E.

Table: XII-3

Annual room occupancy rates by category of hotels

(1979)

Location	Luxury	1st class	2nd class	3rd class	Average
Abu-Dhabi	66.0	68.2	42.8 1/	55.0 2/	66.6
Dubai	45.6	34.6	34.8	51.0	40.7
Sharjah	37.5	26.1	12.7	-	32.8
Others	-	-	-	-	23.0

Notes:

1/ 6 months only
2/ 9 months only

Source : Ministry of Planning, Abu-Dhabi.

U. A. E.

Table: XII-4

International tourist payments in the UAE

(1975 - 1980)

(in millions Dirham)

Year	International Tourism Receipts	International Tourism Expenditure
1975	46	436
1976	98	741
1977	154	1,354
1978	136	1,517
1979	177	2,002
1960	219	2,507

Source : Official estimates by the UAE authorities.

XIII. YAR:

YAR

Table: XIII-1

Arrivals of foreign tourists in hotels

(by month)

(1981 - 1982)

Month	1981		1982		1982/1981 variation
	Total number	Relative share %	Total number	Relative share %	%
January	4,586	8.2	5,306	11.6	+15.7
February	4,866	8.7	4,116	9.0	-15.4
March	4,725	8.4	3,032	6.6	-35.8
April	4,883	8.7	3,448	7.5	-29.1
May	5,464	9.7	2,831	6.2	-48.4
June	4,410	7.9	1,994	4.4	-54.8
July	3,813	6.8	2,816	6.2	-26.1
August	4,896	8.7	4,564	10.0	- 6.8
September	4,495	8.0	3,450	7.5	-25.2
October	3,951	7.0	4,768	10.4	+20.7
November	5,396	9.6	4,299	9.4	-20.3
December	4,666	8.3	5,094	11.1	+ 9.2
Total	56,131	100	45,708	100	-18.6

Source: Information supplied by the Government to the tourism questionnaire of TCTD.

YAR

Table: XIII-2

Arrivals of foreign tourists in hotels

(by country)

(1981 - 1982)

Country group	1981		1982		1982/1981 variation
	Number	Relative share %	Number	Relative share %	%
Arabs	20,646	36.3	16,021	35.1	-22.4
Non-Arabs	35,485	63.2	29,687	64.9	-16.3
Total	56,131	100	45,708	100	-18.6

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-3

Arrivals of foreign tourists in hotels

(by purpose of visit)

(1979 - 1982)

Year	Business journeys 1/	Private journeys 2/	Total
1979	10,286	23,999	23,285
1980	11,785	27,498	39,283
1981	16,839	39,292	56,131
1982	11,772	33,936	45,708

Notes: 1/ Journeys paid for by an organization or enterprise, e.g. business, congresses, seminars, missions etc.

2/ Journeys paid for by the travellers themselves, e.g. for leisure, recreation, holiday, health, religion, family visits etc.

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-4

Nights spent by foreign tourists in hotels

(by month)

(1981 - 1982)

Month	1981		1982		1982/1981 variation
	Total number	Relative share %	Total number	Relative share %	%
January	45,860	8.2	31,836	11.6	-30.6
February	48,660	8.7	24,696	9.0	-49.2
March	47,250	8.4	18,192	6.6	-61.5
April	48,630	8.7	20,688	7.5	-57.5
May	54,640	9.7	16,926	6.2	-69.0
June	44,100	7.9	11,964	10.0	-72.9
July	38,130	6.8	16,896	7.5	-55.7
August	48,960	8.7	27,394	10.4	-44.0
September	44,950	8.0	20,700	7.5	-53.9
October	39,510	7.0	28,608	10.4	-27.6
November	53,960	9.6	25,794	9.4	-25.2
December	41,660	7.4	30,564	11.1	-26.6
Total	561,310	100	274,248	100	-51.1

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-5

Nights spent by foreign tourists in hotels

(by country)

(1981-1982)

Country group	1981		1982		1982/1981 variation %
	Number	Relative share %	Number	Relative share %	
Arab countries	206,460	36.8	96,126	35.1	-53.4
Non-Arab countries	354,850	63.2	178,122	64.9	-49.8
Total	561,310	100	274,248	100	-51.1

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-6

Arrivals of domestic tourists in hotels

(by month)

(1981 - 1982)

Month	1981		1982		1982/1981 variation %
	Total number	Relative share %	Total number	Relative share %	
January	7,943	8.0	6,831	7.4	-14
February	8,731	8.8	6,146	6.6	-29.6
March	9,342	9.4	6,327	6.8	-32.3
April	9,348	9.4	6,858	7.4	-26.6
May	9,009	9.1	5,099	5.5	-43.4
June	8,380	8.4	5,188	55.6	-38.1
July	7,586	7.6	7,669	8.3	+ 1.1
August	8,139	8.2	9,543	10.1	+14.8
September	7,503	7.6	8,313	9.0	+10.8
October	6,894	6.9	10,880	11.8	+57.8
November	8,663	8.7	10,217	11.0	+17.9
December	7,765	7.8	9,657	16.0	+24.4
Total	99,303	100	92,528	100	- 6.8

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-7

Total number of overnights spent by foreign and domestic tourists in hotels

(1979 - 1982)

Year	Nights spent by foreign tourists	Nights spent by nationals and residents	Total
1979	341,850	..	..
1980	392,830	290,325	683,155
1981	561,310	191,394	752,704
1982 1/	274,248	199,582	473,830

Note: 1/ in 1980; a) Foreign tourists arrivals in hotels: 45,708; nights: 274,248; average length of stay: 6 nights.

b) Domestic tourists arrivals: 92,528; nights: 199,582; average length of stay: 2.2 nights.

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-8

Foreign tourists arrivals at frontiers by modes of transport

(1979 - 1982)

Year	Sea	Air	Total
1979	3,600	20,399	23,999
1980	4,125	23,373	27,498
1981	5,849	33,398	39,292
1982	5,090	28,846	33,936 1/

Note: 1/ From Europe 20,768; Americas 2,828; Asia 7,280; Africa 2,736 and from Australia 324; total 33,936.

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-9

Available accommodation capacity

(1981 - 1982)

Accommodation establishments	1981		1982	
	Rooms	Beds	Rooms	Beds
1) Hotels				
5 Star	486	737	486	737
4 Star	138	266	138	256
3 Star	309	530	346	612
2 Star	210	389	168	313
1 Star	361	837	383	968
2) Non-classified	490	1357	426	1267
3) Local accommodation facilities	..	3840	..	3840
Total	1994	7956	1947	7993

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-10

Employment in tourism sector

(1980 and 1982)

Category	Male	Female	Total
Hotel Industry 1/	1,340	100	1,440
Catering Industry 2/	..	..	1,593
Travel Trade 1/	101	38	139
Public Administration 2/	103	1	104

Notes: 1/ in 1980

2/ in 1982

Source: Reply to the tourism questionnaire.

YAR

Table: XIII-11

International tourism payments

(in US Dollars)

(1979 - 1982)

Year	International tourism receipts
1979	20,511,000
1980	23,569,800
1981	33,678,600
1982	21,939,840

Source: Reply to the tourism questionnaire.