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**Improving Statistical  
Capacities of Tourism Sector  
*in Mediterranean and Gulf Regions***

# PROJECT REPORT

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# PROJECT REPORT



Improving Statistical Capacities of Tourism Sector in  
Mediterranean and Gulf Regions

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## Foreword

The definition by the United Nations World Tourism Organisation (UNWTO) for international tourism comprises the activities of individuals travelling to and staying at places outside their usual permanent places of residence for a period not exceeding 12 months for leisure, business and other purposes. In fact, international tourism is a remarkable socio-economic phenomenon and one of the world's largest industries and categories of international services trade. All the activities that are directly/indirectly involved in providing goods and services include transportation and communication, hotels and lodging, food and beverages, cultural activities and entertainment, banking and finance, promotion and publicity services. Given the magnitude of sectors it either directly or indirectly deals with, international tourism is one of the vital contributors in the economic development of developing countries.

From a statistical standpoint, international tourism activities have been growing worldwide at substantial and sustainable rates in terms of both tourist arrivals and tourism receipts over the last five decades. The number of international tourist arrivals worldwide enlarged from 69.3 million in 1960 to 1.1 billion in 2013, corresponding to an average annual growth rate of 5.3%. The international tourism receipts in terms of current US dollar prices made a jump from \$7 billion to \$1.2 trillion in the same period, corresponding to an average annual growth rate of 10.2%; a rate which was significantly higher than that of the world economy as a whole.

International tourism activity is also characterised by a continuing geographical spread and diversification of tourist destinations. In this context, although tourism activity is still observed to concentrate in the developed regions of Europe and the Americas, a substantial growth of new tourist-receiving markets is also observed in many developing countries, including a significant number of member countries of the Organisation of Islamic Cooperation (OIC). The two traditional tourist-receiving regions of Europe and the Americas attracted, together, 71 per cent of the world's total tourist arrivals in 2006. Yet, by 2014, this share declined to 67.6 per cent in favour of the developing regions of Asia & Pacific, the Middle East and Africa. As an important source of foreign exchange earnings and employment in many of these countries, tourism has been given more attention in the national development strategies of many developing countries and placed on the agenda of many recent international conferences on sustainable development.

As a substantial part of the developing countries, international tourism activity in the OIC member countries has been also growing substantially in terms of both tourist arrivals and tourism receipts. The number of international tourist arrivals into the OIC countries increased from 72.3 million in 2000 to 174.6 million in 2013,

corresponding to an average annual exponential growth rate of 6.8%. Similarly, tourism receipts in OIC member countries increased from \$37.3 billion in 2000 to \$144 billion in 2013, corresponding to an average annual exponential growth rate of 10.4%.

In fact, as a group, OIC countries have a high potential for the development of a sustainable international tourism sector. This is particularly true not only due to their rich and diverse natural, geographical, historical and cultural heritage assets, but also due to the fact that their citizens travel in large numbers around the world for business, leisure, and other purposes. However, given the relatively modest share of the OIC region in the world tourism market and the concentration of international tourism activity in only a few OIC countries, it seems that a large part of the tourism potential of the OIC region remains unutilised.

Furthermore, the problems and challenges facing tourism and the development of a sustainable tourism sector in the OIC countries are diverse and range from the lack of technical know-how and weak promotional and public awareness to insufficient tourism-related infrastructures, investments and the lack of tourism diversification and safety. In this respect, evidence based decision making is a facilitator in solving the aforementioned shortcomings and good quality, comparable, timely, reliable, and accessible data is needed to better inform the relevant tourism policies necessitates.

Given its relevance for cooperation among the OIC member countries, tourism has been identified as one of the six priority areas for cooperation in the recently adopted Strategy of the Standing Committee for Economic and Commercial Cooperation (COMCEC) with the strategic objective of developing a sustainable and competitive tourism sector in the OIC region. To achieve strategic objectives defined in the COMCEC Strategy, the COMCEC Coordination Office launched the COMCEC Project Cycle Management (PCM) Programme in 2013.

In concordance with these efforts, the Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRIC) developed the project titled “2013-SESRIC-111: Improving Statistical Capacities of Tourism Sector in Mediterranean and Gulf Regions” which aims at building statistical capacity in tourism statistics and overall contributing to the National Statistical Systems (NSS) of the OIC member countries through capacity building programmes including short term trainings and a regional workshop. The project was among the fifteen projects that were approved by COMCEC Coordination Office in 2013 for funding.

In the fourth quarter of 2014, six short term trainings were conducted in Albania, Jordan, Oman, Qatar, Tunisia and United Arab Emirates. More than 85 participants attended these trainings and tourism statistics experience between provider and beneficiary countries was exchanged during the sessions. The Centre would like to

extend its appreciation to the National Statistics Offices and Tourism Authorities of Egypt, Jordan and Turkey for providing their experts to contribute in the efforts of beneficiary countries in developing their tourism statistics infrastructure.

Within the framework of the same project and through the valuable support of the COMCEC Coordination Office, a Regional Workshop on Tourism Statistics and Tourism Satellite Accounts was also organized by SESRIC, in collaboration with the UNWTO, with the participation of 50 experts from 27 OIC member countries spanning from Suriname in the West to Indonesia in the East. The three-day Workshop covered mainly the issues of System of Tourism Statistics, Inbound, Outbound and Domestic Tourism Statistics, Tourism Expenditure Statistics, Tourism Industries Statistics, Employment in the Tourism Industries, and Tourism Satellite Accounts and give the opportunity to exchange best practices of participating countries concerning the aforementioned activities.

The present Report not only details these activities but also shares the findings from both the six trainings and the Regional Workshop. Mindful of the varying levels of statistical capacities, SESRIC is willing to take further steps to contribute to the statistical capacity development efforts of OIC member countries in light of the findings of the Report.

***Prof. Savaş Alpay***  
Director General  
SESRIC





## Executive Summary

Six short term trainings and one Regional Workshop were conducted within the framework of the project titled “2013-SESRIC-111: Improving Statistical Capacities of Tourism Sector in Mediterranean and Gulf Regions” which aims at building statistical capacity in tourism statistics and overall contributing to the National Statistical Systems (NSSs) of the OIC member countries. The project was among the fifteen projects that were approved by the COMCEC Coordination Office in 2013 for funding.

In chronological order, the trainings were conducted in United Arab Emirates, Jordan, Tunisia, Albania, Qatar, and Oman. The training contents were focused on:

- Tourism Concepts, Definitions and Methodology;
- Domestic Tourism Statistics;
- Inbound Tourism Statistics;
- Outbound Tourism Statistics; and
- Accommodation Statistics.

The trainings were attended by more than 85 participants who were mainly tourism statisticians either working for the National Statistics Offices (NSOs) or relevant national tourism authorities. The trainings not only included the methodological sides of the measurement of tourism activities but also included sharing country specific experiences both from the host and provider countries enriched with question and answer sessions at the end of relevant course topics. This type of training approach also enabled the trainers from the provider countries to give particular recommendations on the types of challenges the experts from the host countries happen to face.

At the end of the trainings, the participants and trainers were asked to respond to the Activity Evaluation Form for three sections; i.e. Activity, Trainer (only by participants), and Comments. The overall findings from the responses collected through the questionnaires completed by participants and trainers are as follows:

For the trainings conducted:

1. **96%** of the participants (47% absolutely and 49% strongly) agreed that the **announcements of trainings were sufficiently in advance.**
2. **95%** of the participants (59% absolutely and 36% strongly) agreed that **their participation in the trainings was highly encouraged by their institutions/superiors.**
3. **85%** of the participants (40% absolutely and 45% strongly) agreed that the **trainings had adequate and clearly identifiable goals.**

4. **80%** of the participants (29% absolutely and 51% strongly) agreed that the **trainings met their expectations in terms of its stated goals.**
5. **79%** of the participants (35% absolutely and 44% strongly) agreed that the **content was organized and appropriate for the time frame.**
6. **82%** of the participants (47% absolutely and 35% strongly) agreed that the **materials distributed/presented were high quality, pertinent and suitable for the trainings.**
7. **83%** of the participants (38% absolutely and 44% strongly) agreed that **physical facilities were suitable for the trainings.**
8. **83%** of the participants (31% absolutely and 51% strongly) believed that they would be able to **apply the activity content in a real world setting.**
9. **90%** of the participants (40% absolutely and 50% strongly) agreed that they had enough opportunity to **interact with other participants.**
10. While **36%** of the participants stated that trainings *excellent*, **58%** of them stated they were *good* and **4%** of them stated they were *satisfactory*.

For the trainers who conducted the trainings:

11. **95%** of the participants (52% absolutely and 43% strongly) agreed that the **trainers were well-organized and prepared.**
12. **98%** of the participants (60% absolutely and 38% strongly) agreed that the **trainers had a thorough knowledge of the subject matter and answered all the questions to the best of their capacities.**
13. **87%** of the participants (40% absolutely and 46% strongly) agreed that the **trainers used effective presentation/teaching strategies.**
14. **82%** of the participants (44% absolutely and 38% strongly) agreed that they would like to **attend the future activities to be conducted by the same trainers.**
15. While **54%** of the participants stated that the trainers were *excellent*, 31% of them stated they were *good* and **13%** of them stated they were *satisfactory*.

In the Comments section, the participants pointed out that the main strengths of the trainings were the trainers, trainers' comprehensive knowledge on the topics covered, and the presentation materials used.

If the participants had been to conduct the trainings, they would have done these by:

- receiving **background information** about the NSS of the beneficiary countries in advance to focus on areas with performance issues and to present recommendations at the end of trainings;
- providing the presentation **materials and content before the trainings;**
- adding more **visual materials** in the presentations;

- modifying the **presentation style** to be more motivating, interactive, simplified for complex topics, and inclusive of brainstorming sessions;
- inviting **more trainers** for broader experience sharing;
- giving **more details** for some topics; such as, domestic tourism, involvement of different agencies in production of tourism statistics;
- enriching the contents by covering **detailed real world examples**, practical case studies, and their calculations; and
- expanding the **duration of trainings** to cover all details;

The participants further stated that the training could be improved by

- covering each topic in more detail under **separate trainings** with more focus on the implementation of tourism satellite accounts (TSA);
- giving **daily assignments** to consolidate what participants learnt; and
- inviting all **relevant stakeholders** that are active in the tourism sector.

On the other hand, the trainers of the six trainings gave the following responses in the Activity Evaluation Form for Trainers:

1. While 67% of trainers agreed that the **information provided by SESRIC was excellent**, 33% of them stated that information provided was **good**.
2. The **accommodation coverage** (per diem) was found **good** by 33% and **satisfactory** by 50%.
3. The **transportation coverage** (including travel tickets, visa etc.) was found **excellent** by 33%, **good** by 50%, and **satisfactory** by 17%.
4. **All trainers** (50% absolutely and 50% strongly) were **satisfied** with the training facilities/locations (meeting halls, comfort, accessibility, etc.)
5. **17%** of the trainers **absolutely** and **50% strongly** believes that the participants were **well-organized, concerned and prepared**.
6. **50%** of the trainers **absolutely** and **17% strongly** believes that the participants demonstrated **active and interactive participation**.
7. **83%** of the trainers (50% absolutely and 33% strongly) agreed with the idea of **participating in another SESRIC activity**.

As to the Regional Workshop on Tourism Statistics and Tourism Satellite Accounts held on 2-4 December 2014 in Ankara, Turkey, 50 representatives from 27 OIC member countries who were tourism statisticians in the NSOs, relevant tourism authorities, and Central Bank experts together with international experts attended the event. The contents were mainly about:

- System of Tourism Statistics (STS);
- Inbound Tourism Statistics;
- Outbound Tourism Statistics;

- Tourism Expenditure Statistics;
- Domestic Tourism Statistics;
- Tourism Industries Statistics;
- Employment in the Tourism Industries; and
- Tourism Satellite Accounts (TSA)

For future reference, the Workshop materials are accessible on: <http://www.oicstatcom.org/event-detail.php?id=1050>

An important exchange of views took place on:

- the constitution of Inter-institutional Platforms in order to put in practice regular working programmes on statistical researches;
- the situation of tourism statistics;
- the difficulties met in the reconciliation of data from different origins (demand and supply data; diagnosis of the reasons of these differences and the way to resolve them);
- the links established with National Accounts and Balance of Payments statistics;
- the difficulties and inconsistencies related to classifications, treatment of the basic data on tourism, and the scope of statistics from the supply side, etc., and
- various pathways and funding towards compilation of TSA, among other methodological subjects.

The question and answers sessions held after the presentations revealed that there appears to be still some limitations on

- statistics on flow of tourists;
- statistics on tourism expenditure under its different forms;
- national accounts, and
- statistics on balance of payments, (items travel and passenger transportation) in the case of some countries.

These limitations are proposed to be overcome by careful planning and conduct of capacity building activities focusing the requirements of each individual country.

At the end of the Workshop, 42 of the participants responded to the Activity Evaluation Form. The findings are summarized below:

For the Regional Workshop conducted:

1. **74%** of the participants *absolutely* agreed that the **announcement of the Workshop was sufficiently in advance.**

2. **98%** of the participants (58% *absolutely* and 40% *strongly*) agreed that their **participation in the Workshop was highly encouraged by their institutions/superiors.**
3. **91%** of the participants (44% *absolutely* and 47% *strongly*) agreed that the Workshop had **adequate and clearly identifiable goals.**
4. **79%** of the participants (28% *absolutely* and 51% *strongly*) agreed that the Workshop **met their expectations in terms of its stated goals.**
5. **91%** of the participants (42% *absolutely* and 49% *strongly*) agreed that the **content was organized and appropriate for the time frame.**
6. **88%** of the participants (60% *absolutely* and 28% *strongly*) agreed that the **materials distributed/presented were high quality, pertinent and suitable for the activity.**
7. **88%** of the participants (65% *absolutely* and 23% *strongly*) agreed that the **physical facilities were suitable for the activity.**
8. **91%** of the participants (33% *absolutely* and 58% *strongly*) believed that they would be able to **apply the activity content in a real world setting.**
9. **89%** of the participants (49% *absolutely* and 40% *strongly*) agreed that they had enough opportunity to **interact with other participants.**
10. While **44%** of the participants stated that the activity was *excellent*, **44%** of them stated it was *good*, and **2%** of them stated it was *satisfactory*.

For the UNWTO trainer:

11. **96%** of the participants (56% *absolutely* and 40% *strongly*) agreed that the trainer was **well-organized and prepared.**
12. **89%** of the participants (49% *absolutely* and 40% *strongly*) agreed that the trainer had a **thorough knowledge of the subject matter and answered all the questions to the best of his capacity.**
13. **84%** of the participants (49% *absolutely* and 35% *strongly*) agreed that the trainer used **effective presentation/teaching strategies.**
14. **79%** of the participants (51% *absolutely* and 28% *strongly*) agreed that they would like to **attend the future activities to be conducted by the same trainer.**
15. While **49%** of the participants stated that the trainer was *excellent*, **33%** of them stated he was *good*, and **14%** of them stated he was *satisfactory*.

The Workshop participants pointed out the main strengths of the Workshop as the good organisation provided by SESRIC, good collaboration among SESRIC, COMCEC, and UNWTO; pertinent coverage of topics; exchange of experience among participating countries; useful examples provided by the trainer; good environment created during the sessions to enable good communication and interaction; discussion sessions; timeliness; and making UNWTO publications available.

If the Workshop participants had been to conduct the Workshop, they would have done this differently by

- providing more **practical exercises and case studies**;
- giving more weight on **TSA related issues**;
- covering the involvement of the **private sector** in tourism statistics;
- inviting **experts from non-OIC countries** to listen to their experience and hear their;
- expanding the Workshop **more than three days**;
- presenting **more solutions to the problems encountered** by participating countries;
- allocating time to those **country presentations from which the majority of participants benefit**; and
- keeping the order from **easy to complicated stuff** especially for TSA related issues.

The participants further stated that the Workshop could be improved by balancing the number of country presentations in each session; focusing more on TSA and improvement of tourism surveys; keeping the daily schedule from 09:00 to 15:00; having break-out sessions to enable the groups to come together and discuss on their own; extending the allocated days in the future Workshops; and organising a Gala Dinner and Social Programme for the participants to enable communication among them;

As additional comments, the Workshop participants stated the following:

- To maintain the framework of cooperation among SESRIC, COMCEC and UNWTO after the Workshop to continue interaction between countries for a dynamic progression;
- More active involvement of the UNWTO is needed for the TSA implementation at the individual country level;
- UNWTO should review the manual, particularly in terms of details of the information required; such as (country of residence, purpose of visit of inbound/outbound tourist). As discussed, more countries are abandoning the usage of cards. These information are usually acquired through surveys;
- Venues of future Workshops may be in a touristic spot;
- This type of Workshop is exemplary and in order to measure our progress, these Workshops should continue in the future;
- Outlining a roadmap is necessary to follow up and achieve specific requirements to reach good quality of tourism statistics in OIC countries.

93% of the survey respondents indicated that their NSO would benefit from a capacity building programmes in tourism statistics. The following rates show the most wanted areas for statistical capacity activities:

- Tourism Satellite Accounts (TSA): 76.7% of the participants (mainly wanted by participants from Europe and Central Asia (ECA) and Middle East and North Africa (MENA))
- Tourism Expenditure Statistics: 74.4% of the participants (mainly wanted by MENA and ECA participants)
- Tourism Industries Statistics: 74.4% of the participants (mainly wanted by MENA, ECA, and Sub-Saharan Africa (SSA) region participants)
- Employment in the Tourism Industries: 74.4% of the participants (mainly wanted by ECA and MENA participants)
- Domestic Tourism Statistics: 72.1% of the participants (mainly wanted by MENA, ECA, and SSA participants)
- Outbound Tourism Statistics: 69.8% of the participants (mainly wanted by ECA and MENA participants)
- Inbound Tourism Statistics: 67.4% of the participants (mainly wanted by ECA and MENA participants)
- Tourism Demand Side: 65.1% of the participants (mainly wanted by ECA and MENA participants)
- Tourism Concepts, Definitions and Methodology: 62.8% of the participants (mainly wanted by ECA, SSA, and MENA participants)
- Tourism Supply Side: 62.8% of the participants (mainly wanted by ECA, SSA, and MENA participants)

12 out of 27 participating countries indicated their readiness to provide trainers for the trainings in other OIC countries. Only two countries (Côte d'Ivoire and Malaysia) said they could provide trainers on TSA. This shows there is a need to support the capacities of member countries on TSA.

The SESRIC would like to acknowledge the role played by the mechanisms brought about by the COMCEC Coordination Office which guided the SESRIC with timely and quality feedbacks during the project period. The other lessons learnt include the prospects to carry the current project to consecutive phases, and the need for strengthening the capacities on the TSA processes.

As a follow-up to the 2013-SESRIC-0111 project, the SESRIC will go on organising short term trainings and regional workshops in collaboration with the OIC member countries and the UNWTO with a focus on detailed fields of the tourism statistics and TSA and also considering the individual training capacities and needs of the countries on a wider scale.

For the Full Report  
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