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Turismo regional y desafíos globales frente a la incertidumbre política: estudio de caso de la región de Mena

Regional Tourism and Global Challenges in the Face of Political Uncertainty: Case study of the Mena Region

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Abstract

The potential of the MENA region, which is the cradle of the development of world civilization, is no exception, as evidenced by numerous historical artifacts combined with the modern way of life. The natural and cultural values of the region are attractive to different target groups, but have not yet been fully developed, unusable or irretrievably destroyed. Structural problems in tourism policy and the economy exacerbate the situation in many countries of the region. The study aims to quantitatively and qualitatively assess the dependence of the Middle East individual tourist markets on global political events based on a more in-depth study of the regional specifics. Using the method of bivariate correlation regression, the material presented models of the dependence of tourist visits on the level of political stability in neighboring countries, thanks to which the reader can form a clear picture of the structure of income and expenditures of the tourism industry in the countries of the region. The obtained indicators can become the basis for the

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development of a set of measures for the restoration and strategic development of the tourism industry in the region.

Keywords: crisis; lost profits; MENA region; Middle East and North Africa; terrorism; tourism development.

Resumen

El potencial de la región MENA, que es la cuna del desarrollo de la civilización mundial, no es una excepción, como lo demuestran numerosos artefactos históricos combinados con el modo de vida moderno. Los valores naturales y culturales de la región son atractivos para diferentes grupos destinatarios, pero aún no han sido plenamente desarrollados, inutilizables o irremediablemente destruidos. Los problemas estructurales en la política turística y la economía exacerban la situación en muchos países de la región. El estudio tiene como objetivo evaluar cuantitativa y cualitativamente la dependencia de los mercados turísticos individuales de Oriente Medio de los acontecimientos políticos globales basándose en un estudio más profundo de las particularidades regionales. Utilizando el método de regresión de correlación bivariada, el material presenta modelos de la dependencia de las visitas turísticas del nivel de estabilidad política en los países vecinos, gracias a los cuales el lector puede formarse una imagen clara de la estructura de ingresos y gastos de la industria turística en los países de la región. Los indicadores obtenidos pueden convertirse en la base para el desarrollo de un conjunto de medidas para la restauración y desarrollo estratégico de la industria turística en la región.

Palabras clave: crisis; lucro cesante; Región MENA; Oriente Medio y África del Norte; terrorismo; desarrollo turístico.

1 Introduction

The tourism industry is one of the largest in the global economy. In many countries, this industry provides a significant part of money income to the economy and employment of the population. Therefore, tourism industry development can be influenced by numerous factors: social, economic, political, environmental, and others. Safety is a separate factor. Security and peace are public goods consumed by travelers by nature in a tourist destination, and their provision is considered a prerequisite for the development of tourism (Groizard et al., 2021). Obviously, security in different regions of the world is provided in different ways, exactly how and differently perceived and its level, depending on the economic and political situation in a particular country or group of countries

(Bilgin, 2019). In different parts of the world, certain factors have a predominant influence. For example, in the Middle East and North Africa (MENA), these are political turmoil, terrorism, and civil war; in Central, East, and West Africa - numerous conflicts and military coups; in South and Central America - political and economic problems.

The Middle East is the most difficult for understanding the influence of global political events on tourism industry development. This region has been the epicenter of political and military conflicts since the twentieth century. Beyond the status of "geopolitical crossroads", the economic structure of the region ranges from archaic traditional production and a fascinating heritage of historical craftsmanship to the extraction of rich natural resources and modern industrial mass production, archaeological sites that reveal wonders of the world, and a traditional urban culture that meets the challenges of modernity and confronts hyper-modern urban developments of global significance (Hopfinger & Scharfenort, 2020). The natural and cultural attractions in MENA are highly prized, attracting tourists from all over the world. However, this tourist wealth is not fully exploited, as many tourist sites are unusable or irretrievably destroyed by riots, uprisings and wars. In many countries of the region, structural problems in tourism policy and economics exacerbate the situation. As a result, the number of international tourist arrivals and revenues from tourism activities in different countries of the region differ significantly (Hopfinger & Scharfenort, 2020).

2 Literature Review

2.1 The Global Impact of Political Events on Tourism Development in the World

Globalization exists not only in the supply of tourism, but also defines an increasingly interconnected tourist demand worldwide. Today, many countries are linked by strong economic ties through tourism activities (Song et al., 2017). However, growing geopolitical risks have a negative impact on the tourism industry. Tourists are often deliberately targeted during geopolitical conflicts such as wars and terrorist attacks. International tourists are also often targeted in times of crisis for political reasons, such as punishment for their government's support of other governments (Lee et al., 2020). A case in point is the Middle East, where political instability and numerous conflicts not only negatively affect economic development in the region, particularly trade, transportation, transit, tourism and foreign investment, but also create complex economic and social consequences for neighboring countries (Dabrowski & Domínguez-Jiménez, 2021). As risk-averse consumers, tourists will therefore further balance utility and cost when planning a tourist trip, as they want to eliminate any chance of being hit by violence at their destination (Usman et al., 2022). Thus, the perception of the risk associated with violence in MENA countries leads to a change to a safer destination, for example, to stable EU, ASEAN, the Caribbean countries, or even just stay at home, developing local domestic tourism.

At the same time, it must be recognized that the Middle East region is no exception to the global trend, which became more prominent in 2019, when protests erupted around the world (in France, Hong Kong, Chile, Iran, South Africa). This wave of protest stems from growing inequality, resentment of corruption, awareness of regional disparities in wealth within countries, and doubts about political regimes that fail to meet their citizens' expectations for creating well-being and social justice (De Larramendi, 2020).

Terrorism has had a significant impact on economies around the world. The economic impact of terrorism is estimated at $33 billion in 2018, and since 2000, the total loss to the world economy has reached $855 billion. Terrorism increased dramatically after the September 11, 2001 terrorist attacks in the United States. However, the sharpest increase occurred between 2011 and 2014, when conflicts followed the Arab uprising in Syria, Libya, Yemen and Egypt. This period also saw the escalation of conflicts in Iraq, Afghanistan and Pakistan with the strengthening of the Islamic State terrorist group in the Middle East. The negative economic impact intensified as global terrorism grew, peaking at $111 billion in 2014 (Bardwell & Iqbal, 2020). Moreover, the terrorist attacks not only caused a security threat for tourists, but also proved to be a threat to the historical heritage. So, during the hostilities or the ideological campaign carried out by terrorists, cultural heritage sites were severely damaged or completely destroyed, which previously attracted a large number of tourists (Seabra & Paiva, 2020; Seyfi & Hall, 2020).

2.2 Arab Spring

About 10 years ago, a wave of protests in the Arab world led to a sharp decline in the tourism industry. At the same time, in most MENA countries, losses in the economy amounted to billions of dollars.

Political crisis, dubbed the Arab Spring, began in 2010 in Tunisia with demonstrations and protests by people against bureaucracy and corruption, and later spread to Syria, Libya, Yemen, Egypt and Bahrain (Mohiuddin, 2016). In 2011, individual Arab countries from MENA region found themselves in a situation of political turmoil after a revolutionary wave of spontaneous demonstrations followed by large-scale protests. In some countries, civil protests led to immediate political change, and their long-serving rulers were forced to resign. This was the case in Tunisia, Egypt, Libya, and

Yemen. In other countries, civil protests erupted or were of minor proportions. In the case of Syria, the government responded to the protests with harsh security measures and military operations. These episodes of the so-called Arab Spring mark the end of a long period of political stability in the region (Groizard et al., 2016).

Already after the Arab Spring, several countries in MENA, heavily dependent on tourism, experienced an unprecedented wave of political violence and terrorist attacks. This subsequently led to a decrease in the number of tourists and their refusal to visit Egypt, Tunisia and Turkey (Lanouar & Goaied, 2019).

In Jordan, which has long been a politically stable country, the tourism industry has also suffered significant losses. Many tourists from Europe and America have canceled visits originally planned to Jordan as a result of these events (Magablih & Mustafa, 2018).

2.3 The Civil War in Libya, Syria and Yemen and Its Consequences for the Economy of Tourism

In the Middle East, one of the negative consequences of the Arab Spring has been the long civil wars in Libya, Syria and Yemen. These conflicts have had an impact on the level of tourist visits to the region.

The war in Libya has effectively split the country into warring factions, leading to economic paralysis and the deterioration of the humanitarian situation in most cities and rural areas. Huge flows of refugees rushed to neighboring countries and Europe along the Mediterranean route. In context of tourism, civil war in 2011 halted tourism activities and paused the development of Libya's tourism sector. The war have resulted in the Libyan tourism infrastructure being partially destroyed, and, of course, international airlines and cruise lines went out of business. Exclusively foreign military specialists, civil engineering specialists, employees of international humanitarian organizations and journalists have become peculiar tourists (Mansour et al., 2019).

A similar situation exists in Syria. The local civil war in had a negative impact on neighboring countries. In Jordan, economic conditions have deteriorated, investment and tourism have decreased (Alshoubaki & Harris, 2018). Syrian refugees have undoubtedly affected the economy and the political situation in Lebanon (Tınas, 2017).

The events of the Syrian Arab Spring, whose initial outbreak also had economic roots, led to a civil war with complex political contradictions, which had a heavy impact on the local economy, including the tourism industry. The chances of the local economy recovering from the current crisis depend mainly on the influence of global geopolitical factors (Cohen, 2016).

In recent years, the Middle East has gradually returned to its pre-Arab Spring state. However, political and geographic factors continue to influence security issues in the region. The civil war in Yemen is no longer just an internal struggle, but primarily a Sunni-Shia conflict (Aly, 2018).

As a result of the hostilities, the tourism sector in Syria and other conflict countries has fallen into decline. Moreover, the intensification and spread of violence has affected tourism revenues throughout the MENA region, affecting countries such as Egypt, Jordan, Lebanon and Tunisia, which traditionally relied on tourism as a major source of income (Rother et al., 2016).

Thus, the political crisis of the 2010s has had a significant impact on many areas of people's lives and activities in MENA. Among the previous studies on this issue, not enough attention has been paid to the study and assessment of the impact of political crisis in some Arab countries on tourism industry development in other countries of the region. The purpose of this study is to assess quantitatively and qualitatively the dependence of individual tourism markets on global political events based on a more in-depth study of the Middle East region.

2.4 Adaptive Strategies for Sustainable Tourism in the MENA Region

Sustainable tourism in regions prone to conflict, particularly in the MENA region, relies on adaptive mechanisms that mitigate geopolitical risks and turn vulnerabilities into opportunities. However, adaptive capacities vary depending on the specific countries and circumstances affected by economic infrastructure and political stability (Yasin et al., 2023). Examples of such adaptation include diversified tourism offerings, minimal dependence on politically unstable destinations, and a focus on cultural, environmental, and adventure tourism (Njifon et al., 2023). Countries like Jordan take advantage of their perceived neutrality and security in the region and launch aggressive marketing campaigns to position themselves as “safe haven” destinations. This perception is not only created but also actively reinforced through partnerships with international organizations (Fuchs et al., 2024).

Strategic sustainability is also apparent in the development of solidarity tourism, which is widely practiced in Lebanon and Iraq. This type of tourism contributes to the financial and psychological support of communities affected by military conflicts, while maintaining a steady flow of visitors (Wen et al., 2023). Sustainable tourism management models have emerged as crucial tools for addressing issues related to environmental degradation, cultural heritage preservation, and economic viability. These models, grounded in the principles of environmental sustainability, have shown success in helping countries strike a balance between promoting tourism growth and protecting natural resources (Gupta et al., 2023). The emphasis on active policy formulation, including the engagement of local communities and international cooperation, has proven beneficial for the creation of infrastructure that can withstand geopolitical shocks and foster the long-term growth of the industry (Smiesova et al., 2023). Sustainability is a proactive approach that places the MENA region at the forefront of adaptation to ongoing challenges.

The socio-economic impact of political instability on domestic tourism in the MENA region highlights the interplay between disrupted tourist flows and the adaptation mechanisms of local economies. During times of political unrest, international visitor numbers can fluctuate. However, domestic tourism can act as a stabilizing force, providing a boost to regional economies through localized spending and increasing resilience against external shocks. This underscores the effect of “economic isolation” on domestic tourism, which can mitigate losses in foreign exchange inflows (Karimi et al., 2021). Domestic tourism, which is grounded in affinity and familiarity, tends to thrive in a politically unstable environment with restrictions on international travel. This phenomenon can be seen in several MENA countries, highlighting the socio-economic need for a reliable domestic tourism infrastructure to compensate for the decline in international visitors. The correlation between a reduction in cross-border tourists and an increase in domestic activities is evident in sustainable models (Ahmed & Oumer, 2022).

The development of domestic tourism is linked to the socio-economic stratification of the local society. Affordability and accessibility play a crucial role in shaping the travel behavior of individuals, as political crises can exacerbate income inequality and limit the participation of economically prosperous groups, while marginalizing low-income segments. This raises concerns about the inclusivity of domestic tourism growth, which is particularly relevant in war-affected regions where population displacement can redistribute tourism demand to less affected areas, creating uneven economic benefits (Mashika et al., 2023). The cultural significance of domestic tourism in promoting national identity during times of crisis cannot be overestimated. Identity tourism serves both economic and symbolic purposes, often supported by government initiatives that utilize heritage tourism narratives to bolster local morale (Guasca et al., 2021).

Political instability poses serious challenges for the tourism industry in MENA countries. Nevertheless, the adaptive capacity of domestic tourism, which is based on cultural affinity, proximity to neighboring countries, and the involvement of the local community, can help mitigate socio-economic impacts. This approach has the potential to provide continuity in the face of uncertainty.

Post-conflict tourism recovery in the MENA region requires strategies that focus on “building resilience.” These strategies should include infrastructure rehabilitation, political innovation, and community engagement to address socio-economic imbalances and restore confidence in regional tourism. For instance, the Balkan model provides a compelling example of how heritage preservation can be integrated with economic recovery (Andries et al., 2021). The main focus of these efforts is on diversifying tourism offerings, such as ecotourism and cultural tourism, which reduce dependence on politically unstable regions. An example of this can be the success of Qatar’s strategy of diversifying its tourism market. By attracting tourists from different parts of the world, Qatar can avoid the adverse geopolitical consequences (Yap et al., 2022).

The restoration of damaged objects, both tangible (historical landmarks) and intangible (cultural traditions), is an important step in restoring regional identity and attracting visitors. By utilizing best practices in rehabilitation and developing international partnerships, countries can mitigate the lack of available resources. The use of participatory approaches, as demonstrated during the post-conflict integration of the local population in Vietnam, emphasizes the importance of inclusivity in reconstruction efforts (Hien & Thanh, 2022).

The integration of technology into tourism recovery strategies, such as the use of virtual reality (VR) for virtual tours of conflict-affected sites, has a dual purpose. It provides alternative sources of income while also preserving fragile historical resources from excessive tourism (Hornoiu et al., 2023). International cooperation, policy coordination, and the creation of regional sustainable tourism networks have become essential for ensuring long-term stability and growth. In this regard, conflict resolution also fits within the framework of economic development.

3 Materials and methods

The demand for tourism is measured by the number of tourists and tourism revenues. Supply in the market is assessed by quantitative and qualitative analysis of hotels' and similar establishments’ occupancy rates (Kundra et al., 2021).

According to the adopted World Bank methodology, international inbound tourists (overnight visitors) are tourists who travel to a country other than the one in which they normally reside, for a period not exceeding 12 months, and whose main purpose of visit is not a paid activity inside the country visited. When data on the number of tourists are not available, the number of visitors is displayed instead, which includes tourists, same-day visitors, cruise passengers, and crew members (World Bank, 2021).

Receipts from international tourism are expenditures of arriving tourists, including payments to national carriers for international transportation. These receipts include any other prepayment made for goods or services received in the destination country. Their share in exports is calculated as the ratio to exports of goods and services, which include all transactions between residents of a country and the rest of the world involving the transfer of ownership from residents to non-residents of general merchandise, goods sent for processing and repair, non-monetary gold and services (World Bank, 2021).

The inclusion of data from reputable sources enhances the reliability of the presented information. For instance, the World Governance Indicators (WGI) assess political stability, government effectiveness, and management quality. Data from the World Bank serve as comprehensive metrics of management and cost-effectiveness. These sets of data (typically in the form of cross-references) allow for a multidimensional analysis of tourism trends and stability. At the same time, aggregated indicators of regional stability have limitations, as they may hide anomalies and time fluctuations in specific countries, leading to discrepancies in the assessment of tourism dynamics.

Assessment of tourism industry development in the Middle Eastern countries was carried out on the basis of studying the dynamics of changes in the indicator "International tourism, number of arrivals". For this purpose, indicators were considered separately for each country under study: Total arrivals, Overnight visitors (tourists), Same-day visitors (excursionists), of which, cruise passengers. The demand for inbound tourism was studied based on the analysis of the following indicators: arrivals by region, arrivals by mode of transport.

The study of the dependence of travel markets on global political events was conducted using the Political Stability and Absence of Violence/Terrorism index, which is included in the calculation of The Worldwide Governance Indicators. Political Stability and Absence of Violence/Terrorism measures the perception of the likelihood of political instability and politically motivated violence, including terrorism in any given country in the world (Kaufmann et al., 2010).

The actual trends of tourism development in MENA are influenced by significant differences between countries in terms of their economic systems, which determine parameters and the macroeconomic importance of this sector. The different trends are related to two common factors. First, the natural characteristics of the countries are extremely relevant. For example, there is a difference between the oil-producing countries: Algeria, Kuwait, Qatar, Saudi Arabia, UAE and the countries that have no or very limited reserves of this raw material; these countries, therefore, are more dependent on tourism from a macroeconomic perspective: Tunisia, Egypt, Oman (Hopfinger & Scharfenort, 2020).

The modern era of the tourism industry has contributed to the transformation within Saudi Arabia. Saudi Arabia has become open to all foreigners. In addition, Saudi Arabia is known worldwide for pilgrimage tourism because the country has two holy places of Islam, Mecca and Medina. Every year, nearly 12 million pilgrims around the world make the Hajj. The change in Saudi Arabia's tourism industry is a consequence of Saudi Vision 2030, a program aimed at diversifying the oil economy (Khan, 2020).

It should be noted that the limitations of the study concerned the number of MENA countries covered. The study focused on the period 2010-2019. Only four Middle Eastern countries - Lebanon, Jordan, Saudi Arabia, and Oman - were studied in more detail. This is because these countries were located close to the epicenters of major military conflicts and political upheavals. At the same time, the trends of the tourism industry in the studied countries differed significantly, which provided an opportunity to study them more thoroughly.

With regard to statistical analysis, this study was based on the analysis of global tourism industry indicators obtained from the World Bank database and sorted in Excel. To visualize the geodata of the countries, the Excel 2019 charting function on the Bing platform was used. The sources of the processed data are presented in the Appendices (1-5).

Interpreting the implications of statistical nuances, particularly standard errors and the coefficient of determination (R^2), is crucial for making reliable policy recommendations. Standard errors reflect the accuracy of regression coefficients, indicating the variation in the expected impact of political stability on tourism demand. Greater accuracy increases the reliability of policy development, especially in situations with high variability. The value of R^2 determines the proportion of variation in tourism indicators that can be explained by political stability indices. This emphasizes the effectiveness of the model and guides the allocation of resources towards effective interventions. A low R^2 indicates the presence of other explanatory variables.

4 Results

Tourism at the beginning of the twenty-first century has become the most important sector of the global economy, on which the well-being of millions of people depends. At the same time, this sector of the global economy is very much dependent on political events and conflicts, one of the epicenters of which in recent years has been the Middle East.

In the world economy, before the pandemic, revenues from tourism accounted for about 7.6% of all exports. At the same time, in MENA countries, revenues from tourism reached 10.6% of total exports in 2019. Such countries as Lebanon (48%), Jordan (42.1%), Egypt (26.6%), and other countries in the region are very economically dependent on the tourism industry (Table 1).

Table 1. International tourism, receipts (% of total exports)

YEAR/ COUNTRY	BAHRAIN	ALGERIA	EGYPT	ISRAEL	JORDAN	KUWAIT	LEBANON	QATAR	SAUDI ARABIA	OMAN	TUNISIA	TURKEY	MIDDLE EAST &	WORLD
2010	12.1	0.5	27.9	6.9	34.4	0.8	38.7	-	2.9	2.8	15.7	16.7	8.1	6.1
2011	7.7	0.4	19.8	6.4	31.7	0.6	29.1	3.7	2.5	3.1	11.2	16.5	5.4	5.8
2012	5.6	0.4	22.3	6.7	35.8	0.6	36.6	5.1	2.1	3.1	13.2	15.4	5.5	5.9
2013	5.5	0.5	15.1	6.7	36.2	0.5	35.2	5.8	2.2	3.2	13.0	16.8	5.3	6.2
2014	6.0	0.5	16.9	6.6	35.5	0.6	36.3	7.5	2.6	3.5	14.1	17.0	6.1	6.4
2015	11.0	0.9	18.4	7.0	35.2	1.5	36.4	13.1	5.1	5.8	10.7	16.9	9.0	7.0
2016	16.9	0.8	9.8	6.9	36.5	1.6	39.0	17.4	6.7	7.7	10.1	13.3	10.2	7.3
2017	16.4	0.5	20.1	7.5	38.8	1.1	42.7	18.5	6.3	7.4	10.1	14.4	10.4	7.2
2018	12.7	0.4	24.6	7.3	41.2	1.1	45.4	14.9	5.4	6.4	11.9	15.5	9.2	7.1
2019	-	0.4	26.6	7.3	42.1	1.6	48.0	17.0	6.9	7.3	14.0	17.2	10.6	7.6
2019 to 2010, +-	-	-0.2	-1.3	0.4	7.7	0.9	9.2	-	4.5	4.1	-1.7	0.5	2.6	1.5

Source: Developed by the authors based on World Bank data (2021)

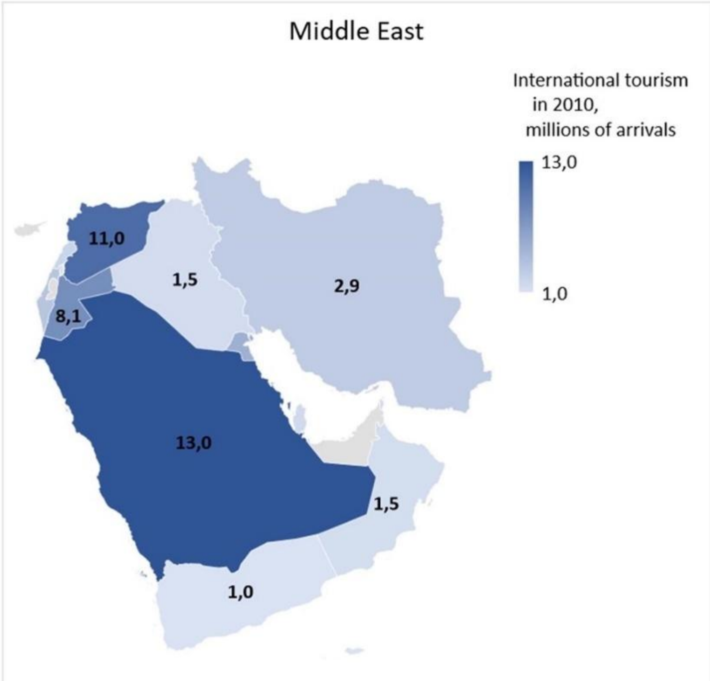
If considering the dynamics of tourism revenues share between 2010 and 2019, one can observe its certain dependence on the events associated with the political upheavals caused by the "Arab Spring" and the ensuing civil war in Syria, Yemen, as well as terrorist acts in Iraq. The most notable drop in tourism revenues was in the MENA group as a whole, from 8.1% in 2010 to 5.4% in 2011, 5.5% in 2012, 5.3% in 2013, and 6.1% in 2014. However, already in 2015, the rate had surpassed pre-crisis levels and reached 9%, rising to 10.2% in 2016, 10.4% in 2017, and 9.2% in 2018. In 2019, before the pandemic, the share of revenues from tourism in this group of countries reached 10.6%.

An analysis of temporary changes in tourism indicators in the MENA region revealed complex trends, highlighting the interplay between regional conflicts and policy adaptations. In Lebanon, despite the ongoing instability, the ratio of tourism revenues to export revenues increased from 38.7% in 2010 to 48% in 2019. This reflects the country's strategic focus on cultural tourism and its resilience to geopolitical pressures. Jordan saw moderate growth from 34.4% in 2010 to 42.1% in 2019. However, this process was accompanied by a marked decline in the number of tourist arrivals (from 8.1 million to 5.4 million), indicating the impact of the Syrian crisis. Saudi Arabia has demonstrated transformational progress: its tourism revenues increased from 2.9% to 6.9% over the same period. This is due to initiatives under the Saudi Vision 2030 program, which expanded pilgrimage infrastructure and diversified tourism offerings. The success of these initiatives emphasizes the importance of strategic reforms in mitigating risks in the region. The tourism revenues of Oman also increased, from 2.8% in 2010 to 7.3% in 2019. This growth can be attributed to investments in ecotourism and Oman's positioning as a stable destination in the region, demonstrating its ability to leverage natural assets in times of regional turbulence.

The analysis of changes in the share of revenues from tourism in different countries throughout 2010-2019 showed significant differences in the dynamics of their change. Some countries, such as Jordan, Lebanon, Saudi Arabia, and Oman, despite their proximity to hotbeds of political instability and military conflicts, showed an increase in the share of tourism revenues in the total volume of exports.

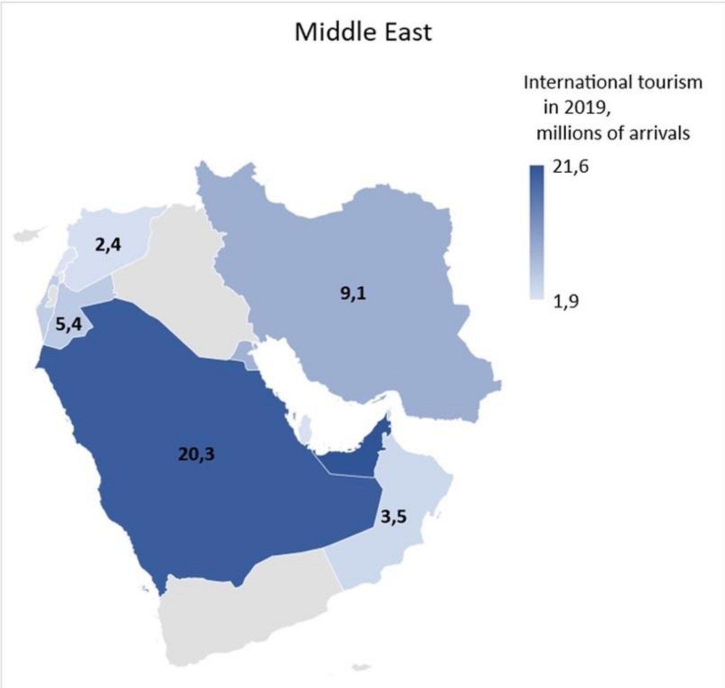
At the same time, despite the increase in the share of tourism revenues, the total number of visits increased only in Saudi Arabia and Oman, while in Jordan and Lebanon it decreased markedly (Figures 1-2).

Figure 1. International tourism at the Middle East in 2010 (Qatar – 1.7; Lebanon – 2.2; Israel – 3.4; Kuwait – 5.2; Bahrain – 12; United Arab Emirates - no data available)



Source: Developed by the authors on the basis of data from the World Bank (2021)

Figure 2. International tourism at the Middle East in 2019 (Lebanon – 1.9; Qatar – 2.1; Israel – 4.9; Kuwait – 8.6; Bahrain – 11.1; United Arab Emirates – 21.6; Yemen & Iraq – no data available)



Source: Developed by the authors on the basis of data from the World Bank (2021)

In Jordan, the number of tourist visits fell from 8.1 million in 2010 to 5.4 million in 2019. Lebanon also saw a similar trend. The decrease in tourist visits from 2.2 million in 2010 to 1.9 million in 2019 indicates a definite impact of the political turmoil caused by the civil war in Syria (Table 2).

Table 2. International tourism at the Middle East in 2010 and 2019

COUNTRY	INTERNATIONAL TOURISM IN 2010, MILLIONS OF ARRIVALS	INTERNATIONAL TOURISM IN 2019, MILLIONS OF ARRIVALS	2019 TO 2010 IN %
Bahrain	12.0	11.1	92.5
Iran	2.9	9.1	310.0
Iraq	1.5	-	-
Israel	3.4	4.9	142.4
Jordan	8.1	5.4	66.4
Kuwait	5.2	8.6	164.5
Lebanon	2.2	1.9	89.3
Oman	1.5	3.5	233.7
Qatar	1.7	2.1	125.7
Saudi Arabia	13.0	20.3	155.8
Syrian Arab Republic	11.0	2.4	22.1
United Arab Emirates	-	21.6	-
Yemen	1.0	-	-

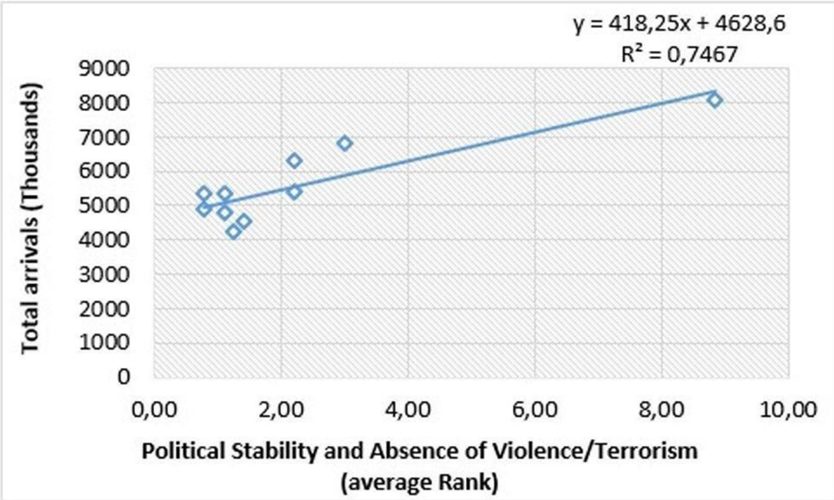
Source: developed by the authors on the basis of data from World Tourism Organization (2021), World Bank (2021)

To investigate the dependence of the tourism markets of Jordan, Lebanon, Oman and Saudi Arabia on political events of global significance, an analysis of supply and demand was conducted. The level of demand was measured by the number of visits to a country depending on the level of political stability rank. The higher the rank, the better the political stability in a country. The regional political stability rank was calculated as an average of the ranks of the three countries where the most violent conflicts and protests were observed. These are Iraq, Syria, and Yemen. After that, the dependence was determined by building a bivariate correlation model. The main statistical characteristics of the resulting models are shown in Appendix 1.

The diversification of indicators, such as the coefficient of determination (R^2), slope variations, and standard errors, increases the accuracy of the analysis. Therefore, the results provide detailed insights into the impact of political stability, reflecting the nuances of socio-economic interdependence in different contexts. For example, Jordan's high R^2 (0.75) suggests the presence of a strong linear relationship between stability and tourism demand. In contrast, a low R^2 of Lebanon (0) and the negative slopes for Oman and Saudi Arabia (-209.30 and -971.46, respectively) indicate an inverse correlation. These differences in regional dynamics highlight the need for targeted policies to improve the resilience of systems and reduce economic vulnerability caused by instability.

In Figure 3, one can see that the number of visits to Jordan directly depended on the rank of political stability in Iraq, Syria, and Yemen. Just before the events leading up to the Arab Spring in Jordan, there were about 8 million visits. After 2010, visits dropped to 4-5 million in the following years (Figure 3).

Figure 3. Assessing the impact of the political situation in Iraq, Syria and Yemen (average rank for all countries) on the level of tourist visits to Jordan

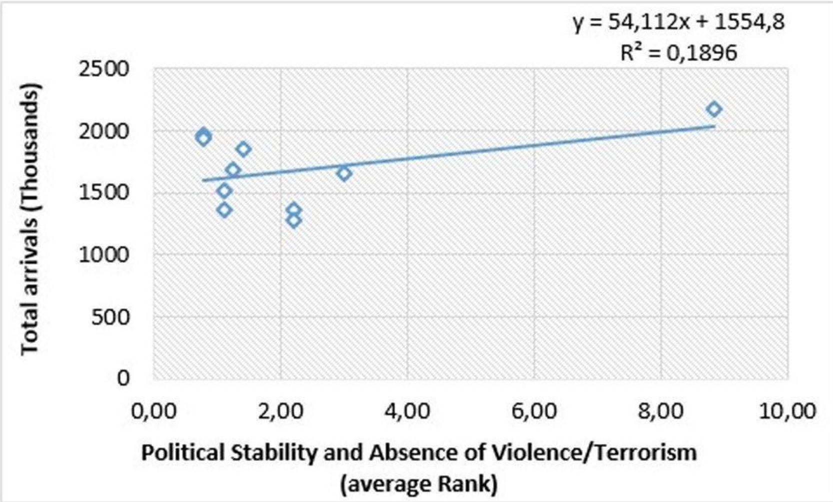


Source: Developed by the authors on the basis of data from World Tourism Organization (UNWTO) (2021), The Worldwide Governance Indicators (2021)

This was due to the fact that Jordan is located next to Syria and Iraq, where during this period the civil war worsened and there was an increase in terrorist activity. This had a significant impact on the local tourism industry, which faced new risks and reduced demand for its services among foreign tourists (Appendix 2).

As in the case of Jordan, Lebanon is located next to Syria. Therefore, tourism industry development also depended on the political situation in the Middle East (Figure 4).

Figure 4. Assessing the impact of the political situation in Iraq, Syria, and Yemen (average rank for all countries) on the level of tourist visits to Lebanon

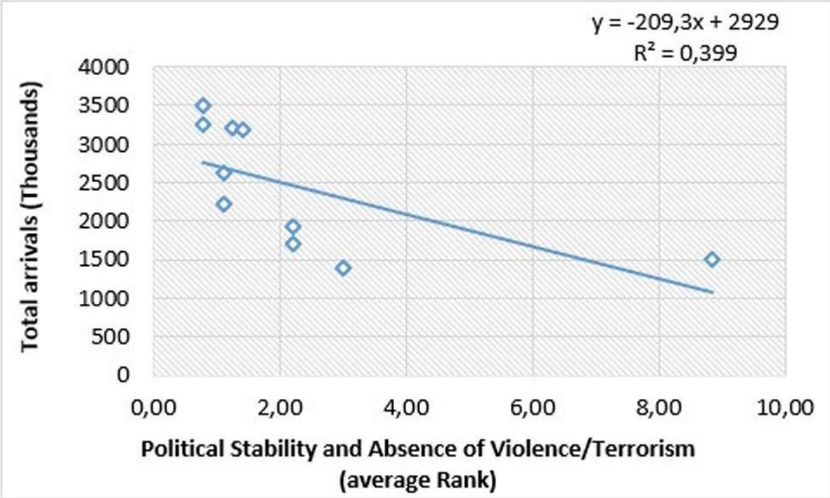


Source: Developed by the authors on the basis of data from World Tourism Organization (UNWTO) (2021), The Worldwide Governance Indicators (2021)

However, this correlation was less pronounced than in Jordan. This is explained by the fact that Lebanon was visited mostly by tourists from neighboring countries in the region. Moreover, Lebanon has access to the sea and is geographically located on the farthest side of the Syrian border. These factors contributed to the reduction of risks and a more sustainable development of the tourism sector. Thus, the supply of rooms in hotels has increased from 22176 in 2010 to 34286 in 2019, including bed-places, respectively, from 34125 to 126659 (Appendix 3).

In contrast to Jordan and Lebanon, in Oman and Saudi Arabia there was an inverse relationship between the number of visits and the state of political stability in the region. Growing political instability had no effect on the number of tourist visits to these countries (Figure 5).

Figure 5. Assessing the impact of the political situation in Iraq, Syria, and Yemen (average rank for all countries) on the level of tourist visits to Oman

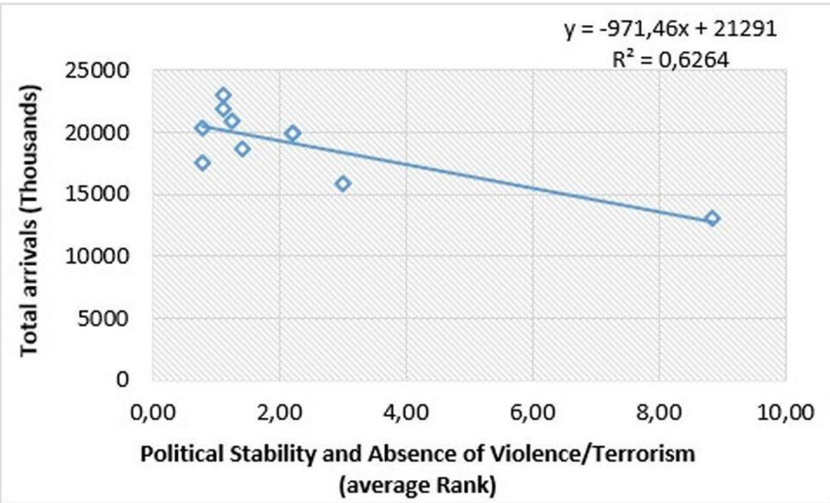


Source: Developed by the authors on the basis of data from World Tourism Organization (UNWTO) (2021), The Worldwide Governance Indicators (2021)

Despite the ongoing civil and military conflict near the border in Yemen, the number of visits to Oman increased significantly by more than 2.3 times compared to 2010 (Appendix 4).

The situation is similar in Saudi Arabia (Figure 6). However, there may be another explanation related to religious tourism. Each year millions of pilgrims make the Holy Hajj to visit Mecca.

Figure 6. Assessing the impact of the political situation in Iraq, Syria, and Yemen (average rank for all countries) on the level of tourist visits to Saudi Arabia



Source: Developed by the authors on the basis of data from World Tourism Organization (UNWTO) (2021), The Worldwide Governance Indicators (2021)

At the same time, if one separately considers the structure of visits to Saudi Arabia from the main regions of the world, the greatest growth can be observed from South Asia, East Asia, Africa, America and Europe, while the flow of tourists from the Middle East decreased (Appendix 5). This can largely be explained by the difficult political and economic situation. This is especially true for Syria, Iraq, and Yemen.

The results of the study provide numerical data on fluctuations in tourism in the MENA region after the Arab Spring. However, they lack depth in the presentation of the socio-political factors that underlie these changes. While Lebanon's tourism revenues increased from 38.7% in 2010 to 48% in 2019, Jordan experienced a modest increase from 34.4% to 42.1%. At the same time, the number of tourist arrivals to Jordan decreased significantly (from 8.1 million to 5.4 million). This highlights the impact of civil unrest and prolonged military conflicts on regional tourism. The Syrian civil war has reduced the number of arrivals to Lebanon by 13.6%, reflecting its dependence on stability in neighboring countries. Religious tourism in Saudi Arabia has shown remarkable resilience, with its revenues increasing from 2.9% to 6.9% between 2010 and 2019. The annual number of pilgrims for the Hajj exceeded 12 million due to infrastructure investments under Saudi Vision 2030. This data emphasizes the stabilizing impact of religious tourism in times of regional unrest, as religious imperatives often outweigh geopolitical risks. Oman's tourist revenues have also grown, driven by the expansion of ecotourism. Despite conflicts in neighboring Yemen, its revenue increased by 161.4%. Unlike Lebanon and Jordan, which rely on cultural tourism due to their proximity to tourists' places of residence, the tourism of Oman is less dependent on external stability.

5 Discussion

This study confirms the dependence of individual Middle Eastern tourism markets on political events of global significance. However, this dependence is not confirmed in the case of religious tourism, which is more resistant to political and economic shocks.

This can largely be explained in terms of the theory of differences in the economic systems of the Arab countries. Its essence is that for resource-sufficient countries, tourism is not an important sector of the economy, while for less resource-sufficient countries this industry is strategic (Hopfinger & Scharfenort, 2020).

In recent decades, MENA has experienced more frequent and serious conflicts than any other region of the world. This has resulted in enormous casualties. The region now faces unprecedented challenges, including significant destruction and a refugee crisis more complex than any since World War II (Rother et al., 2016).

MENA countries are among the worst affected by terrorism. The economic losses from the impact of terrorism in the region since 2000 amounted to $434 billion (Bardwell & Iqbal, 2020).

The study of the impact of domestic and transnational terrorism on tourism demand as measured by visitor arrivals to Lebanon, Turkey, and Israel, using a regression model, shows that the distinctive feature of the relationship under study is the intensity of terrorism and related spillover effects. Empirical results based on monthly data from 1995 to 2007 show that terrorism in one country affects the flow of visitors not only to that country but also to other countries. It has been established that tourists consider the Lebanese and Turkish tourist markets as substitutes. Terrorism in Israel of all kinds, including domestic or transnational, affects the arrival of tourists to Lebanon and Turkey. At the same time, terrorism has a much greater negative impact on the flow of tourists to Lebanon (Bassil et al., 2019).

MENA region is characterized by its unique location in a complex geopolitical space of constant tension between Europe, Asia, Africa, and the Americas, as well as by a special economic structure that ranges from archaic traditional manufacturing to the extraction of rich natural resources and modern industry (Hopfinger & Scharfenort, 2020).

Assessing the impact of political instability and terrorism on the demand for inbound tourism to Syria before and after the political crisis that erupted in 2011 shows that, on the one hand, problems related to internal conflict and tensions, as well as the government's ability to enforce law and order, are more significant in reducing tourist visits to the country. The role of the external factor of the conflict, foreign pressure, and military intervention is somewhat lower (Hanon & Wang, 2020).

If tourists are not threatened in the Middle East, international tourism can be a sustainable economic solution, benefiting guests and hosts alike. Tourism is a valuable source of economic recovery for the region as a whole (Morakabati, 2019). A sustainable post-crisis tourism business, if successful, can effectively deal with new global challenges, such as the COVID-19 pandemic. Since tourism is inextricably linked with transport and services, businesses will do everything possible to maintain their positions so that customers are not only exposed, but also do not feel the risks. This requires well-established work on supplies (Alkasasbeh et al., 2022), as well as marketing, information support in order to minimize changes in people's preferences when faced with the risks of a pandemic and other challenges (Abbas et al., 2021; Im et al., 2021).

Tourism business development attracts more and more attention all over the world because of the direct, indirect, and induced economic effects associated with it. In the post-crisis period, countries providing tourism services must be proactive in promoting marketing strategies to restore the tourism market to create a new image of the industry, necessary to convince potential tourists of the safety of travel, thereby ensuring a return to competitiveness and economic growth. In addition, tourist demand is more sensitive to price and exchange rate fluctuations than to geopolitical risks. Countries experiencing geopolitical risks are often portrayed negatively internationally, and this often leads to lower prices in their tourism sector. At the same time, less risk-averse travelers can be persuaded through proactive marketing to take advantage of cheaper vacation costs in such places (Lee et al., 2020). Mentioned factors must be taken into account by travel firms, which often operate in a highly competitive and volatile environment, which is typical of turbulent environments that include both economic shocks and political instability (Leonidou et al., 2015).

The latest developments in post-crisis recovery strategies reflect the flexibility of tourism demand. Proactive marketing combined with strategic price adjustments has been shown to effectively reduce geopolitical risks. These measures, based on economic and behavioral analysis, have demonstrated that differentiated pricing can attract a demographic group that is less prone to risk. This helps restore the competitiveness of a destination. Factors, such as exchange rate fluctuations and perceived security (as noted in studies of unstable market conditions), highlight the relationship between economic and sustainable tourism. It is important to develop adaptive models that combine consumer psychology and macroeconomic stability to ensure sustainable recovery in areas sensitive to geopolitical instability.

A comparative analysis of regions outside the MENA, such as South Asia and Sub-Saharan Africa, may reveal adaptive strategies based on contrasting regional sustainability models. Specifically, this analysis may show the interaction between “geopolitical instability” and tourism dynamics through differentiated vulnerabilities and recovery mechanisms. South Asia’s emphasis on cultural tourism, such as the promotion of heritage sites in India, contrasts with the ecotourism strategies of Sub-Saharan Africa. This underscores the importance of regional specificity in mitigating geopolitical risks by emphasizing the role of diversified offerings in reducing reliance on conflict-prone sectors. The operationalization of the Political Stability Index requires accuracy in capturing the semiotics of state functionality, the reliability of law enforcement agencies, and socio-economic trust. These metrics shape the perception of tourists and reflect the nuances of behavioral and economic models of choosing a destination. Superficial interpretations are avoided through an exegetic understanding of socio-political semiotics in regional marketing narratives. Intertextual interaction with the models of unstable and sustainable regions, including ASEAN countries' efforts to restore their economies, further contextualizes tourism sensitivity, emphasizing the dialectical relationship between consumer psychology and macroeconomic stability. This is crucial for policy application in geopolitically sensitive areas.

6 Conclusions

Today, tourism is an important sector of the global economy. However, the growing geopolitical risks negatively impact the tourism industry. In times of geopolitical conflicts, such as wars, protests and terrorist attacks, tourists are the most vulnerable, which is the reason for the decrease in tourist activity and the fall in revenues.

In the global economy, before the pandemic, revenues from tourism accounted for about 7.6% of all exports. Meanwhile, in MENA, tourism revenues reached 10.6% of all exports in 2019. The political crisis of the early 2010s had a different impact on tourism development in the Middle Eastern countries. In Jordan, the number of tourist visits to the country fell from 8.1 million in 2010 to 5.4 million in 2019. A similar trend was also observed in Lebanon. In contrast to Jordan and Lebanon, in Oman and Saudi Arabia, the number of visits was inversely related to the state of political stability in the region. Increased political instability did not affect the number of tourist visits to these countries. This is largely due to the difference between conventional tourism and religious tourism, which is more resistant to political and economic turmoil.

Further research can focus on developing a set of measures to restore and strategically develop tourism industry in the region, as well as evaluating its prospects.

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Appendix 1. Regression analysis

Parameter	Value
Jordan	
m-slope	418.25
Standard error for m	86.13
Determination coefficient, R^2	0.75
F-statistics	23.58
Sum of squares	9192701.40
b-section	4628.63
Standard error for b	278.35
Standard error for y	624.37
Number of degrees of freedom, df	8
Residual sum of squares	3118745
Lebanon	
m-slope	54.112
Standard error for m	39.555
Determination coefficient, R^2	0.190
F-statistics	1.871
Sum of squares	153868.74
b-section	1554.835
Standard error for b	127.831
Standard error for y	286.738
Number of degrees of freedom, df	8
Residual sum of squares	657750.16
Oman	
m-slope	-209.30
Standard error for m	90.82
Determination coefficient, R^2	0.40
F-statistics	5.31
Sum of squares	2301867.24
b-section	2928.97
Standard error for b	293.49
Standard error for y	658.33
Number of degrees of freedom, df	8
Residual sum of squares	3467172.36
Saudi Arabia	
m-slope	-971.46
Standard error for m	265.23
Determination coefficient, R^2	0.63
F-statistics	13.42
Sum of squares	49592365.98
b-section	21291.16
Standard error for b	857.13
Standard error for y	1922.63
Number of degrees of freedom, df	8
Residual sum of squares	29572085.6

Appendix 2. Tourism development in Jordan

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total arrivals (Thousands)	8078	6813	6314	5389	5327	4809	4236	4565	4922	5361
Overnight visitors (tourists)	4207	3960	4162	3945	3990	3761	3567	3843.5	4150	4488.4
Same-day visitors (excursionists)	3871	2853	2152	1444	1337	1048	669	721.6	772	872.2
of which, cruise passengers	74	72	85	96	36	34	56	56	74	94.5
Arrivals by region - total (Thousands)	4208	3959	4162	3945	3990	3761	3567	3843	4150	4488
Africa	50	50	55	55	58	52	47	53	58	63
Americas	215	189	199	188	196	192	135	152	182	216
East Asia and the Pacific	149	154	175	177	170	137	101	132	137	159
Europe	745	627	590	537	533	427	348	396	511	678
Middle East	2055	1893	2007	1828	1755	1607	1540	1620	1760	1814
South Asia	65	77	78	75	75	71	41	50	80	75
Other not classified	929	969	1058	1085	1203	1276	1355	1439	1422	1484
of which, nationals residing abroad	929	969	1058	1085	1203	1276	1355	1439	1422	1484
Inbound tourism: arrivals by main purpose - total (Thousands)	4207	3960	4162	3945	3990	3761	3564	3850	4146	..
Personal	3908	3679	3866	3647	3735	3494	3111	3362	3619	..
Business and professional	299	281	296	298	255	267	453	488	527	..
Inbound tourism: arrivals by mode of transport - total	11136	8713	8065	6979	6941	4809	4236	4565	4922	5361
Air	2186	2270	2604	2686	2910	2095	1905	2033	2221	2437
Water	511	366	408	330	269	192	161	153	167	190
Land	8439	6077	5053	3963	3762	2522	2170	2379	2535	2734
Accommodation – total (Thousands)										
Guests	2244	1707	1840	1761	1771	1268	1546	1586	2238	2775
Overnights	4563	3765	4854	3766	3770	2819	3106	3247	4222	5021
Hotels and similar establishments (Thousands)										
Guests	2206	1691	1822				1531	1553	2196	2728
Overnights	4518	3741	4827	3739	3749	2806	3090	3211	4177	4969
Inbound tourism: tourism expenditure in the country (US$ Millions)										
Tourism expenditure in the country	4390	4351	5123	5145	5518	4968	4943	5549	6221	6864
Travel	3585	3425	4061	4117	4375	4065	4044	4639	5249	5786

Passenger transport	805	926	1062	1028	1143	903	899	910	972	1078
Accommodation for visitors in hotels and similar establishments										
Number of establishments (Units)	472	474	478	506	517	539	554	563	565	577
Number of rooms (Units)	23289	23578	23881	25785	26221	26812	27308	32550	33802	34169
Number of bed-places (Units)	44619	45059	45533	49157	50031	51092	51975	52535	54050	54574
Occupancy rate / rooms (Percent)	48	41	50.3	44	43.9	38.4	42.2	39.4	44.2	40.75
Occupancy rate / bed-places (Percent)	40.9	34.5	44.7	36	38	31.3	42.7	34.8	45.2	44.76
Average length of stay (Nights)	2	2	2.4	2	2	..	..	..	..	..
Number of employees by tourism industries - total (Thousands)	41.9	42.8	43.9	48.4	48.6	49.1	50.4	51.3	51.6	53.5
Accommodation services for visitors (hotels and similar establishments)	15.1	15.2	15.4	18.4	18.6	19.1	19.3	20.7	20.7	20.9
Other accommodation services	..	..	..	..	..	..	..	..	..	..
Food and beverage serving activities	17.1	17.6	18.4	19.6	19.5	19.5	20.3	20.2	20.4	20.7
Passenger transportation	0.9	0.9	0.9	1	1	1	1	1	1	2.1
Travel agencies and other reservation services activities	4.5	4.6	4.7	4.8	4.9	5	5	4.9	4.9	4.8
Other tourism industries	4.3	4.5	4.4	4.6	4.6	4.5	4.8	4.5	4.6	5

Source: World Tourism Organization (UNWTO) (2021)

Appendix 3. Tourism development in Lebanon

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total arrivals (Thousands)	2168	1655	1366	1274	1355	1518	1688	1857	1964	1936
Overnight visitors (tourists)	2168	1655	1366	1274	1355	1518	1688	1857	1964	1936
Same-day visitors (excursionists)	..	..	..	..	..	..	..	..	..	..
of which, cruise passengers	..	..	..	..	..	..	..	..	..	..
Arrivals by region - total (Thousands)	2168	1655	1366	1274	1355	1518	1688	1857	1964	1936
Africa	66	83	82	85	76	108	128	138	139	93
Americas	249	223	221	210	225	264	297	328	358	364
East Asia and the Pacific	133	112	102	98	100	109	126	138	147	138
Europe	551	487	446	435	449	507	567	642	709	724
Middle East	868	560	437	381	441	458	498	533	532	546
South Asia	299	188	76	63	63	71	72	78	78	72
Other not classified	2	2	2	1	1	1	1	1	1	1
of which, nationals residing abroad	..	..	..	..	..	..	..	..	..	..
Inbound tourism: arrivals by main purpose - total (Thousands)	..	..	..	..	..	..	..	..	..	..
Personal	..	..	..	..	..	..	..	..	..	..
Business and professional	..	..	..	..	..	..	..	..	..	..
Inbound tourism: arrivals by mode of transport - total	2183	1678	1415	1274	1355	1518	1688	1857	1964	1936
Air	1406	1368	1287	1203	1282	1422	1564	1716	1802	1738
Water	18	26	56	7	7	19	16	13	13	11
Land	759	284	72	64	65	77	108	128	149	187
Accommodation - total (Thousands)										
Guests	..	..	..	..	..	..	..	..	..	..
Overnights	..	..	..	..	..	..	..	..	..	..
Hotels and similar establishments (Thousands)										
Guests	877	739	572	567	626	701	791	860	912	952
Overnights	2106	1741	1611	2167	1993	2479	2534	2766	2896	3055
Inbound tourism: tourism expenditure in the country (US$ Millions)										
Tourism expenditure in the country	8026	6797	7361	7032	6835	7087	7373	8086	8694	8717
Travel	7861	6545	6836	6492	6523	6857	7044	7610	8400	8593
Passenger transport	165	252	525	540	312	230	329	476	294	124

Accommodation for visitors in hotels and similar establishments										
Number of establishments (Units)	338	544	544	549	557	566	575	579	582	584
Number of rooms (Units)	22176	32000	32000	32307	32741	33408	33905	33989	34163	34286
Number of bed-places (Units)	34125	123 331	123 331	123 694	124 311	125 364	126 017	126 213	126 494	126 659
Occupancy rate / rooms (Percent)	37.28	26.1	22.31	22.7	32.07	25.76	23.72	30.48	28.31	27.1
Occupancy rate / bed-places (Percent)	36.07	27.34	22.16	23.37	36.03	27.37	25.55	32.77	30.57	28.89
Average length of stay (Nights)	2.4	2.36	2.81	3.82	3.18	3.53	3.2	3.22	3.18	3.21
Number of employees by tourism industries - total (Thousands)	..	325.7	..	..	..	..	..	..	..	..
Accommodation services for visitors (hotels and similar establishments)	..	71.7	40.5	35.5	..	..	..	..	..	..
Other accommodation services	..	..	..	..	..	..	..	..	..	..
Food and beverage serving activities	..	250	..	..	..	..	..	..	..	..
Passenger transportation	..	..	..	..	..	..	..	..	..	..
Travel agencies and other reservation services activities	..	4	4	3	2.5	2	2	1.7	1.7	1.6
Other tourism industries	..	..	..	..	..	..	..	..	..	..

Source: World Tourism Organization (UNWTO) (2021)

Appendix 4. Tourism development in Oman.

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total arrivals (Thousands)	1500	1393	1714	1923	2225	2634	3207	3178	3242	3506
Overnight visitors (tourists)	1441	1018	1241	1392	1611	1909	2335	2316	2301	2500
Same-day visitors (excursionists)	59	375	473	531	614	725	872	863	941	1006
of which, cruise passengers	..	..	257	202	127	148	217	222	193	283
Arrivals by region - total (Thousands)	..	..	..	..	..	..	..	..	3242	..
Africa	..	..	..	..	..	..	..	..	13	..
Americas	..	..	..	..	..	..	..	..	50	..
East Asia and the Pacific	..	..	..	..	..	..	..	..	30	..
Europe	..	..	..	..	..	..	..	..	759	..
Middle East	..	..	..	..	..	..	..	..	2367	..
South Asia	..	..	..	..	..	..	..	..	23	..
Other not classified	..	..	..	..	..	..	..	..	..	..
of which, nationals residing abroad	..	..	..	..	..	..	..	..	..	..
Inbound tourism: arrivals by main purpose - total (Thousands)	1500	1393	1714	1923	2225	2634	3207	3178	3242	3506
Personal	1271	1163	1393	1562	1822	2150	2647	2631	2892	3095
Business and professional	229	230	321	360	404	484	560	547	350	411
Inbound tourism: arrivals by mode of transport - total	..	..	..	..	..	..	..	..	..	..
Air	..	..	..	..	..	..	..	..	..	..
Water	..	..	..	..	..	..	..	..	..	..
Land	..	..	..	..	..	..	..	..	..	..
Accommodation - total (Thousands)										
Guests	1441	1018	1241	1392	1611	1909	2335	2316	2301	2500
Overnights	6137	6495	8575	9569	11086	13139	16357	17480	20344	19948
Hotels and similar establishments (Thousands)										
Guests	..	..	..	..	..	..	..	..	..	..
Overnights	..	..	..	..	..	..	..	..	..	..
Inbound tourism: tourism expenditure in the country (US$ Millions)										
Tourism expenditure in the country	1072	1515	1723	1888	1971	2247	2390	2717	2975	3193
Travel	783	995	1096	1295	1375	1540	1618	1747	1758	1811
Passenger transport	289	520	627	593	596	707	772	970	1217	1382
Accommodation for visitors in hotels and similar establishments										
Number of establishments (Units)	226	235	248	266	286	318	340	359	412	491
Number of rooms (Units)	11183	11753	12352	13603	14815	16691	18420	19520	22182	25139

Number of bed-places (Units)	174 92	186 54	190 99	203 86	224 61	259 66	286 06	304 89	317 88	336 30
Occupancy rate / rooms (Percent)	51. 01	43. 38	45. 79	47. 72	49. 24	46. 91	47. 3	45. 24	38. 42	37. 36
Occupancy rate / bed-places (Percent)	..	..	..	..	..	..	..	..	..	..
Average length of stay (Nights)	..	..	..	..	..	..	..	..	..	..
Number of employees by tourism industries - total (Thousands)	..	..	..	..	..	..	..	..	..	..
Accommodation services for visitors (hotels and similar establishments)	..	..	..	..	..	..	..	..	..	..
Other accommodation services	..	..	..	..	..	..	..	..	..	..
Food and beverage serving activities	..	..	..	..	..	..	..	..	..	..
Passenger transportation	..	..	..	..	..	..	..	..	..	..
Travel agencies and other reservation services activities	..	..	..	..	..	..	..	..	..	..
Other tourism industries	..	..	..	..	..	..	..	..	..	..

Source: World Tourism Organization (UNWTO) (2021)

Appendix 5. Tourism development in Saudi Arabia

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total arrivals (Thousands)	13025	15776	19847	19934	23010	21834	20887	18607	17570	20292
Overnight visitors (tourists)	10850	14179	16332	15772	18260	17994	18044	16109	15334	17526
Same-day visitors (excursionists)	2175	1597	3515	4162	4750	3840	2843	2498	2236	2767
of which, cruise passengers	..	..	..	..	..	..	..	..	..	..
Arrivals by region - total (Thousands)	10850	14179	16332	15772.2	18260.1	17994.2	18044.3	16109	15334	17525.5
Africa	369	667	895	769	847.5	1139.3	1517.9	1487.1	1407	1501.9
Americas	54	54	157	179	209	284.4	704.2	535.5	909	1018.5
East Asia and the Pacific	485	696	771	1196.6	1176.6	1607.6	1988.3	2041.5	1981	2237.2
Europe	367	644	839	1126	1148	1379.2	1507.5	1149.2	1238	1498
Middle East	8245	9545	10637	9607.6	11144	9935.3	7729.7	6039.4	5567	6521.8
South Asia	1330	2566	3024	2892	3685	3615.7	4335.6	4722.6	4224	4493.4
Other not classified	..	7	9	2	50	32.7	261.1	133.7	8.5	254.7
of which, nationals residing abroad	..	..	..	..	..	..	..	..	..	..
Inbound tourism: arrivals by main purpose - total (Thousands)	10850	14178	16332	15772	18260	17994	18044	16109	15334	17526
Personal	8190	12266	13508	14296	15576	16114	14038	13414	12884	14361
Business and professional	2660	1912	2824	1476	2684	1881	4007	2695	2451	3165
Inbound tourism: arrivals by mode of transport - total	10850	14179	16332	15772	18260.3	17994	18044.4	16108.9	15334	17525.6
Air	7006	8778	10756	10860	12394.8	11967	13590.8	12444.3	11980	14081.4
Water	228	5	1	19	68.8	48	89.6	67.2	75	100.4
Land	3616	5396	5575	4893	5796.7	5979	4364	3597.4	3279	3343.8
Accommodation - total (Thousands)										
Guests	10850	14179	16332	15772	18260	17994	18044	16109	15334	17526
Overnights	180885	272428	318652	304417	355059	193084	187225	171036	173929	189036
Hotels and similar establishments (Thousands)										
Guests	9403	8437	10670	9604	12209	13797	10064	13515	13209	15070
Overnights	161508	118608	115707	117402	131795	134669	108961	146118	154287	165537

Inbound tourism: tourism expenditure in the country (US$ Millions)										
Tourism expenditure in the country	7536	9317	8400	8690	9263	11183	13438	15020	16975	19849
Travel	6712	8459	7432	7651	8238	10130	11096	12056	13791	16431
Passenger transport	824	858	968	1039	1025	1053	2342	2964	3184	3418
Accommodation for visitors in hotels and similar establishments										
Number of establishments (Units)	5828	3019	3111	3551	3697	4394	5994	7099	7292	8281
Number of rooms (Units)	211108	244184	275583	276441	303716	349098	458388	530367	553857	606519
Number of bed-places (Units)	592048	627917	696661	708556	743109	858094	916776	1010680	1107714	1221243
Occupancy rate / rooms (Percent)	59.2	63	64	65.2	66	67	68	64.3	66.6	71.4
Occupancy rate / bed-places (Percent)	52.5	62.1	63.6	61.2	65	66.2	67.2	60.8	62.7	67.22
Average length of stay (Nights)	5.3	4	4	4	..	3.67	3.15	4.19	4.24	4.3
Number of employees by tourism industries - total (Thousands)	629.3	629.3	698.1	797.1	832.1	477.2	517.3	536.0	552.5	571.1
Accommodation services for visitors (hotels and similar establishments)	83.9	97.7	103.8	110.2	115.1	105.2	108.3	115.0	118.9	124.7
Other accommodation services	..	..	..	..	..	..	..	..	..	..
Food and beverage serving activities	306.3	314.7	348.7	376.2	392.8	268.2	283.1	289.5	298.5	306.5
Passenger transportation	160.0	133.9	145.4	146.4	152.8	79.6	84.7	88.3	90.9	94.3
Travel agencies and other reservation services activities	11.9	12.5	13.8	35.3	36.8	15.2	24.1	25.1	25.6	26.3
Other tourism industries	67.2	70.6	86.4	128.9	134.6	9.1	17.1	18.1	18.6	19.3

Source: World Tourism Organization (UNWTO) (2021)