



**UNWTO Committee on Statistics and Tourism
Satellite Accounts**

**Tourism Satellite Account (TSA) Unit
EGYPT**

**April 3rd 2009
Bali, Indonesia**



Contents

- 1. Overview**
- 2. Tourism Statistics**
- 3. Tourism Satellite Account (TSA) Unit**



1- Overview

Tourism industry is a major contributor to Egypt's Economy:

- 40 % from services exports receipts
- 19.3 % from total export earnings
- 11.3 % of GDP directly and indirectly
- 12.6 % from the total direct and indirect employment



1- Overview

Tourism has been the fastest growing sector in Egypt over the last five years (2004 - 2008):

ALL Indicators Increased:

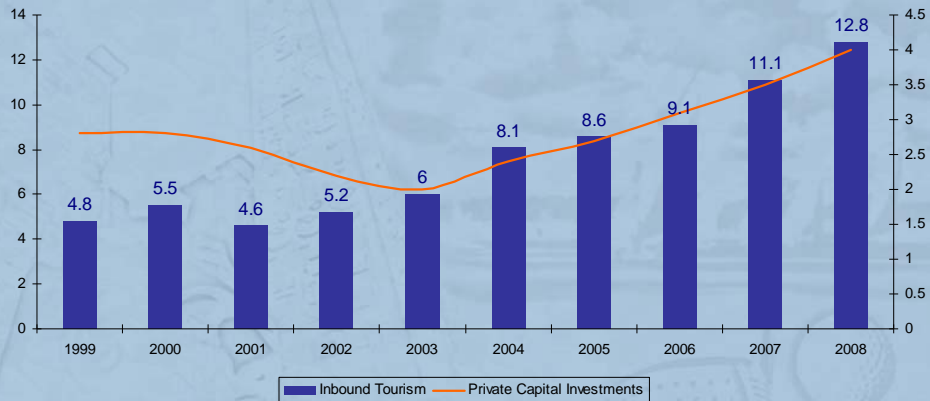
- Tourist Arrivals : from 8.1 to nearly 12.8 million (64%)
- Tourist Nights : from 82 million to 129 million nights (57%)
- Hotel Capacity : from 148 to almost 211 thousand rooms (42%)
- Tourism Receipts: from 6.1 to US\$ 10.8 billion in 2008 (77%)



2- Tourism Statistics

Development of Inbound Tourism & Private Capital Investments (1999-2008)

In the last 10 years Egypt has witnessed continuous growth in Tourist Arrivals and Investments within the Tourism Sector



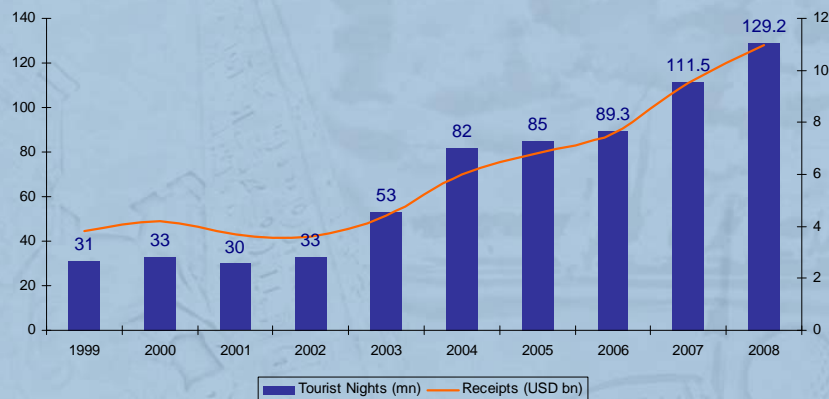
*Source : MOT, 2009



2- Tourism Statistics

Development of Tourist Nights & Receipts (1999-2008)

This has also been coupled with an increase in Tourist Nights and Total Receipts from the Tourism Sector

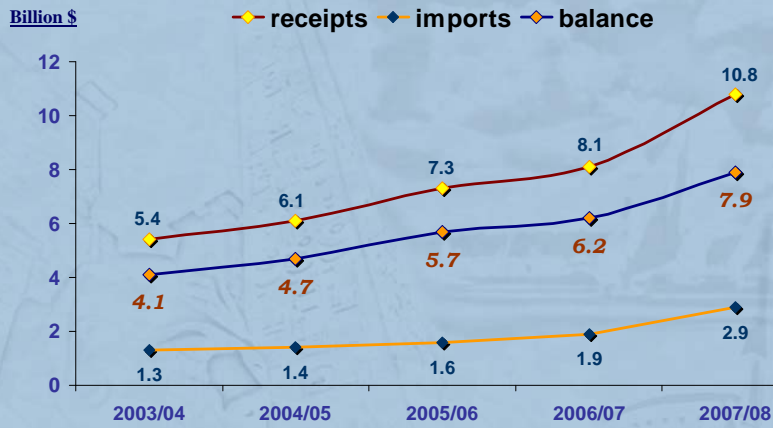


*Source : MOT, 2009



2- Tourism Statistics

Tourism Travel Balance (2003/04 – 2007/08)

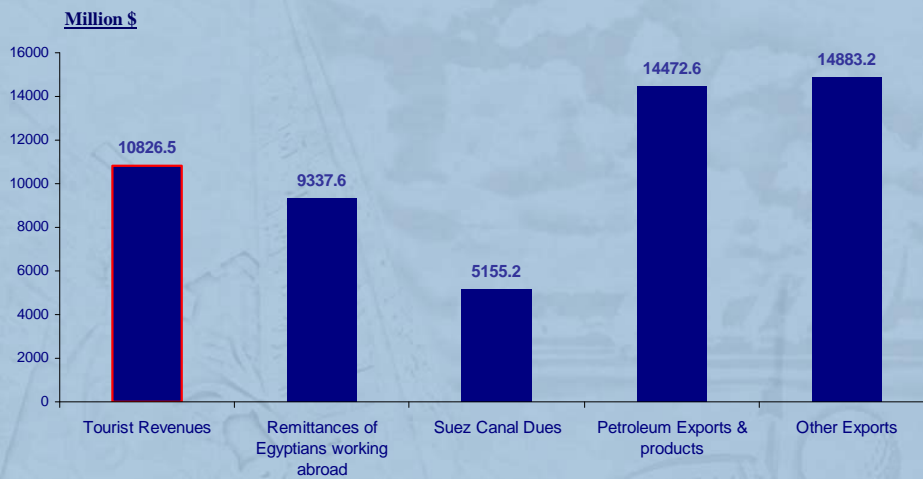


*Source : Central Bank of Egypt , 2009



2- Tourism Statistics

Main sources of Foreign Currency in million US \$ (2007 / 2008)

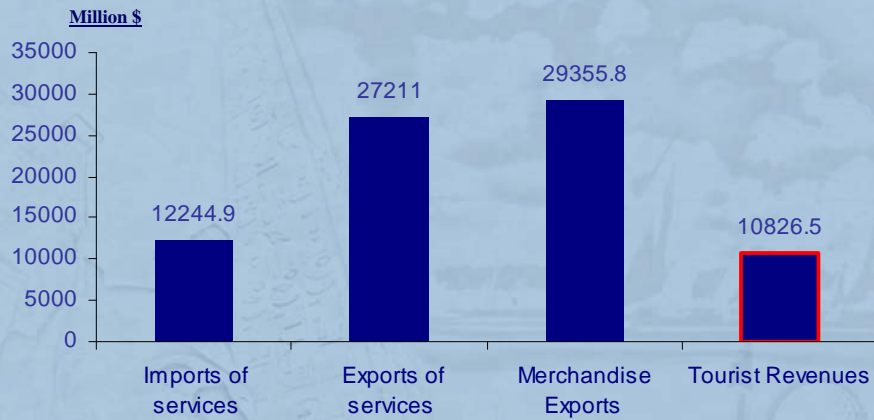


*Source : Central Bank of Egypt , 2009



2- Tourism Statistics

Tourism Impact on Balance of Payments & Balance of Services(2007 / 2008)

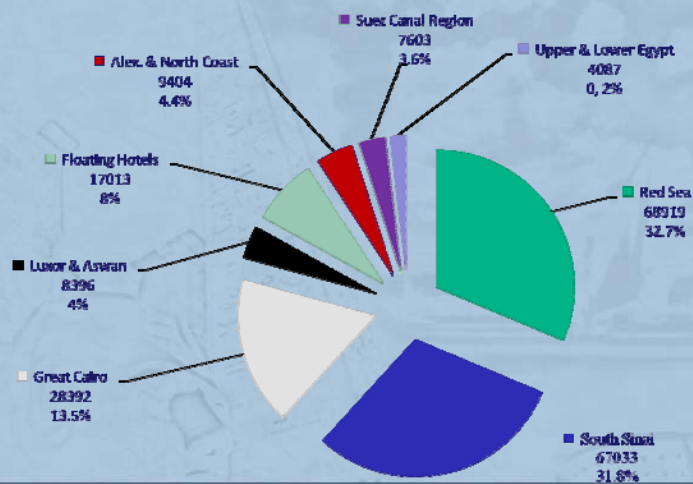


*Source : Central Bank of Egypt , 2009



2- Tourism Statistics

Distribution of Hotel Capacity (2009)

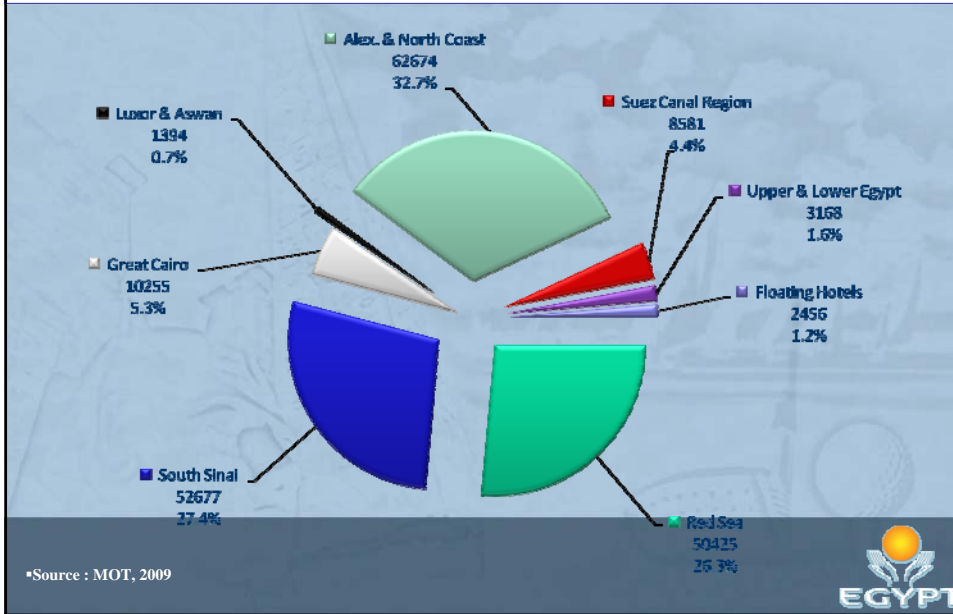


*Source : MOT, 2009



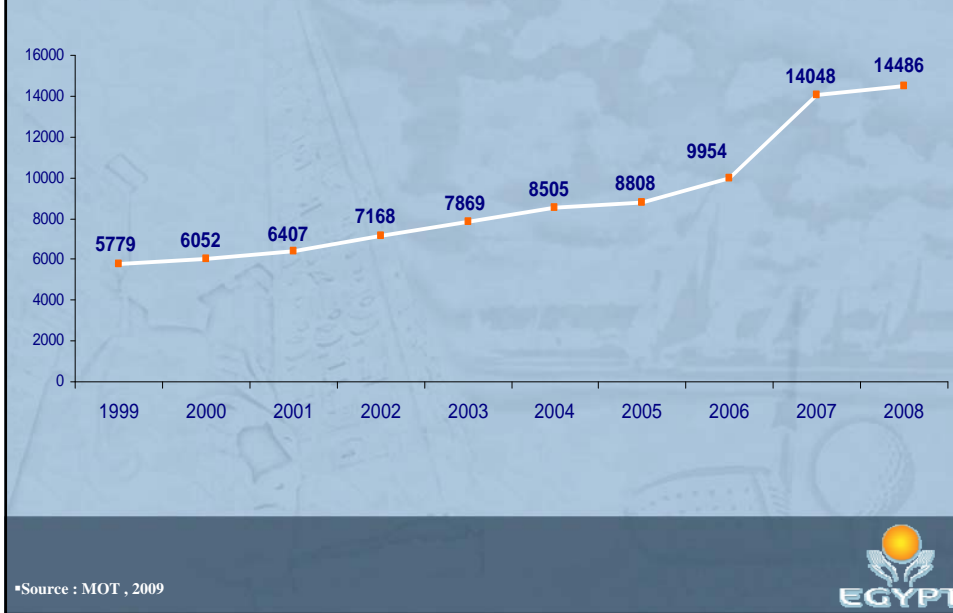
2- Tourism Statistics

Under Construction (2009)



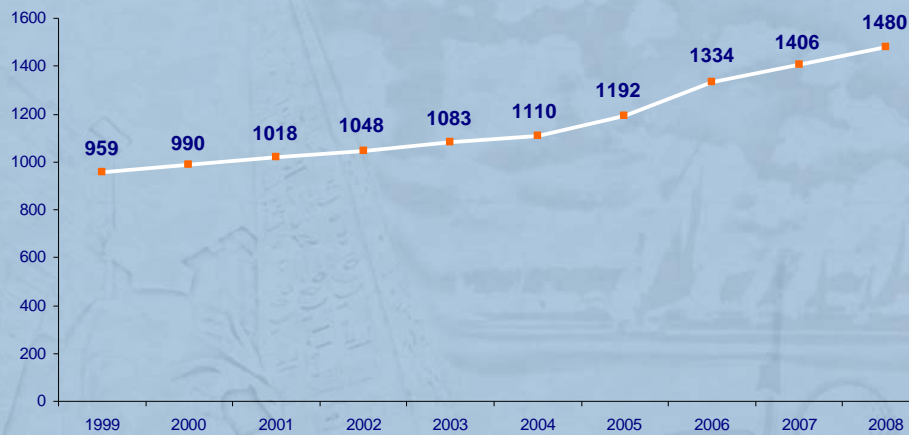
2- Tourism Statistics

■ Tourist Guides (1999-2008)



2- Tourism Statistics

Travel Agencies (1999-2008)



*Source : MOT, 2009



2- MOT Tourism Statistics

The Ministry of Tourism (MOT) and its affiliated bodies issue:

- **On monthly basis:** the international tourism flow report covering data on inbound tourism from aspects like:
 - Number of visitors and nights and purpose of the visit
 - Average length of stay and occupancy rate
 - Revenues
 - Inbound tourism by mode of transportation
- **On annual basis:** a published report that covers :
 - Tourism main indicators (visitors, nights, revenues ... ect.)
 - Tourists and Egyptians Arrivals and Departures via main points of entry & exit
 - Hotel capacity classified by governorates & stars
 - Tourist guides and travel agencies
 - Tourist establishments and diving centers
 - Aviation Traffic



2- MOT Tourism Statistics

➤ Regularly carried out surveys:

- Short-term surveys : provide information for the tourism market
- Expenditure survey : in cooperation with CAPMAS –conducted at ports of departures by self-administrated questionnaires
- Domestic Tourism Survey : the survey is being carried out and the results will be available soon for assessment
- Employment Survey : this survey provides information for tourism sector; hotels, restaurants, shops, travel agencies, etc.

All of the above statistics are very positive indicators however they do **NOT**

reveal the economic importance of tourism relative to the overall economic activities as well as the impact of tourism on the balance of payment



3- Tourism Satellite Account TSA Unit: EGYPT

➔ *A new statistical instrument was needed to measure the size of economic sectors that are not defined as related industries in the National Accounts System*

1. The need for compiling TSA

- a shortage of information concerning the role and *impact of tourism* in Egypt's Economy
- a need of separating and examining both *tourism supply and tourism demand* within the general framework of a national account system and according to UNWTO, OECD and UN classifications

2- Benefits of TSA implementation to the Egyptian Economy

- Assessment of tourism's overall *economic impact*
- *Analysis of tourism policy and Support tourism Strategies*
- *A tourism forecasting*, predicting long-term trends in tourist numbers and expenditures



3- Tourism Satellite Account TSA Unit: EGYPT

3- Setup of an institutional platform for a TSA unit

Methodology:

Set in accordance with the UNWTO/OECD/Euro stat Tourism Satellite Accounting (TSA) methodology

Partners:

- The Central Bank of Egypt (CBE)
- The Central Agency for Public Mobilization and Statistics (CAPMAS)
- Ministry of Economic Development
- Passport and Immigration Authority of the Ministry of Interior (PIAMI)

Resources:

Funds allocated from MOT budget



3- Tourism Satellite Account TSA Unit: EGYPT

4- TSA Unit Implementation Phases

Phase one: February 2008

- TSA pre-feasibility study carried out.
- Cooperation protocol between MOED & MOT signed emphasizing the role of each partner
- A ministerial decree that formulate the steering committee.
- Policy working group (PWG) & Technical working group (TWG)
- Funds for conducting the field surveys allocated

Phase two: October 2008

- **Detailed work plan approved**
- Mobilizing financial and human resources.
- Job description and duties set for technical team



3-Tourism Satellite Account TSA Unit: EGYPT

Phase three: January 2009

- collection and processing of data
- survey sampling
- training field staff
- preparing questionnaires

Phase Four: January 2009 - 2010

- conducting field surveys

Phase Five: Sept 2009- March 2010

- analysis of data
- constructing TSA tables

Phase Six :March 2010-June 2010

- analysis of the impact of tourism on economy.
- submission of final report



TSA Unit Work Plan- 21 months

	Oct 08	Nov 08	Dec 08	Jan 09	Feb 09	Mar 09	Apr 09	May 09	June 09	July 09	Aug 09	Sept 09	Oct 09	Nov 09	Dec 09	Jan 2010	Feb 2010	Mar 2010	April 2010	May 2010	June 2010	
Institutional Setup	█	█																				
Data Collection and processing		█	█																			
Field surveys				█	█	█	█	█	█	█	█	█	█	█	█	█						
Data analysis												█	█	█	█		█	█				
TSA Economic Analysis																		█	█	█		
Final Report																						█





Ministry of Tourism



Thank you for your attention

