



Ministry of Tourism



***A TSA Implementation Project:
Main aspects of Egypt's Experience***

March 2008

Contents

I - Introduction

II - Share in the World Market

III - Tourism Statistics

IV - Main Elements in TSA Project

V - Launching TSA Project



I-Introduction

- **Tourism is a major contributor to Egypt's economy:**
 - **40 % from exports of services**
 - **19.3 % from foreign currency**
 - **11.3 % of GDP directly and indirectly**
 - **12.6 % from total direct and indirect employment**



I-Introduction (Cont.)

- **Tourism the fastest growing sector in 2006/2007:**
 - **4 % of total implemented investment**
 - **13 % of investments in services sector**
 - **22% growth rate in Hotels and Restaurants Investments (Highest Growth Rate among other sectors)**



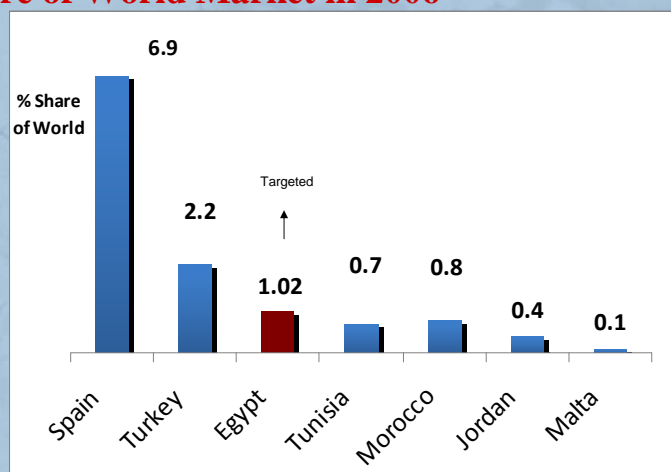
II-Share in the World Market

- **Egyptian share in the world market:**

- Existence of diversified products :historical, cultural, beach, desert, shopping and residential tourism
- Ability to grow once it is properly developed
- By increasing Egypt's Share in the world market to achieve the 14 million tourists targeted in 2011 ———→ receipts will increase.

II-Share in the World Market (Cont.)

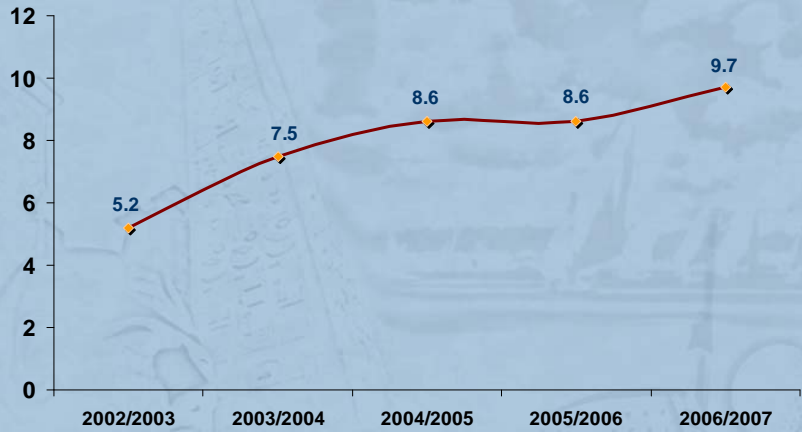
- **Share of World Market in 2006**



Source: Gafi, 2007

III- Tourism Statistics :

Number of Tourists (Million)



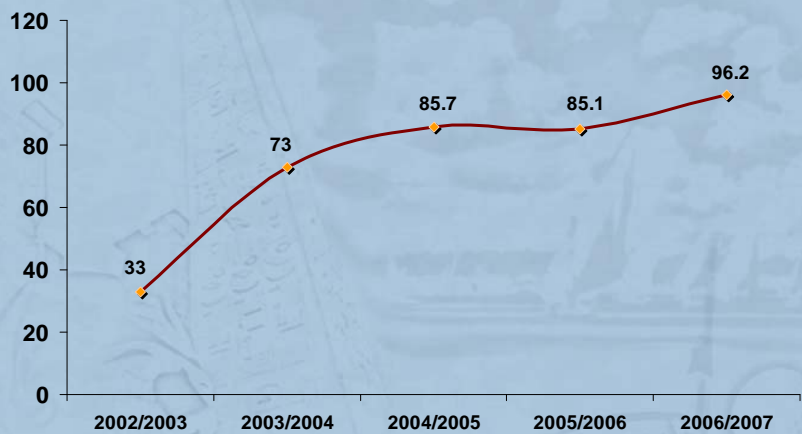
Source: Ministry of Tourism, 2007

Change from (2002/2003 – 2006/2007) = 86.5 %



III- Tourism Statistics (Cont.) :

Number of Tourist Nights (Million)



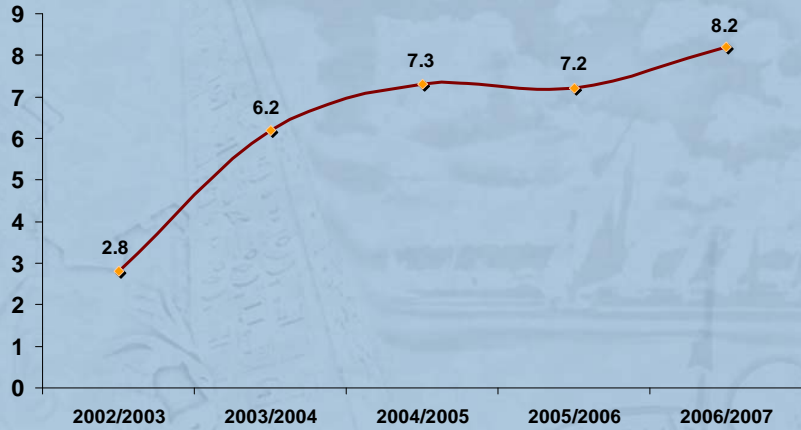
Source: Ministry of Tourism, 2007

Change from (2002/2003 – 2006/2007) = 191.5 %



III- Tourism Statistics (Cont.) :

Tourism Revenues (Billion \$)



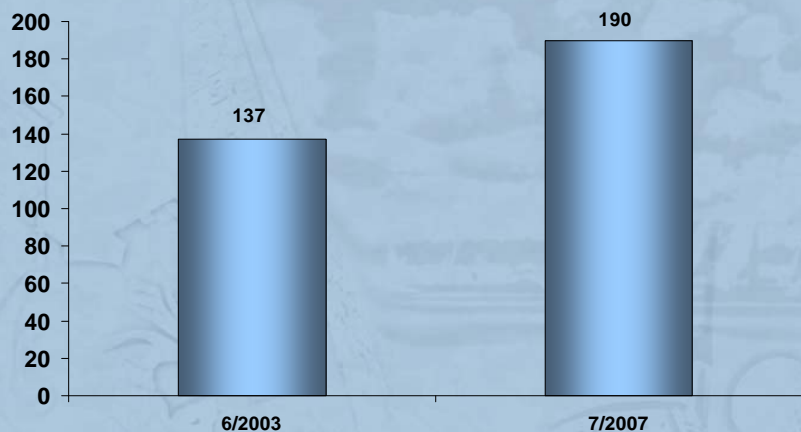
Source: Ministry of Tourism, 2007

Change from (2002/2003 – 2006/2007) = 192.8 %



III- Tourism Statistics (Cont.) :

Hotel Rooms Capacity (Thousands)



Source: Ministry of Tourism, 2007

Change from (2002/2003 – 2006/2007) = 38.6 %



III- Tourism Statistics :(Cont.)

- **Sources of tourism statistics are provided by:**
 1. Passport and Immigration Authority of Ministry of Interior (PIAMI)
 2. Central Agency for Public Mobilization and Statistics (CAPMAS)
 3. Central Bank of Egypt (CBE)
 4. Ministry of Culture (MoC)
 5. Ministry of Civil Aviation (MoA)
 6. General Authority of Free Zones and Investments (Gafi)
 7. Ministry of Tourism (MOT) and affiliated bodies



IV- Main Elements in TSA project:

- **Design TSA Project :**
 - In 2003, Negotiation started between MOT and MOED (former MOP).
 - In 2004, Preparation of Feasibility Study for TSA and preliminary Budget estimation.
 - In 2005, Several visits to CAPMAS to approve regular tourist information, field surveys studies in addition to the tourist expenditure surveys and the administrative data available.
 - In 2006, Compiling a Selection of Tables : minimum set of tables needed from table 1 to table 7 and table 10 from the annexed 10 tables suggested by UNWTO.



IV- Main Elements in TSA project (Cont.):

2- Collecting Hard Data on an annual basis :

- Tourism main indicators (visitors, nights, revenues ... ect.);
- Arrivals and Departures via main points of entry and exit;
- Hotel capacity (existing and under-construction, classified by governorates and stars);
- Occupancy Rate;
- Diving centers;
- Tourist guides, Travel Agencies, Tourist Establishments;
- Visitors of touristic sites.



IV- Main Elements in TSA project (Cont.):

3- Conducting Field Surveys :

In 2006:

- Short-term survey in Sharm El Sheikh
- Domestic Tourism Survey
- Employment Survey.

In 2007:

- Economic Indicators Survey in Sharm El Sheikh
- Each 2 years, Expenditure survey.

IV- Main Elements in TSA project (Cont.):

4 - Data and Activity Gaps in 2006:

- Statistical Frame indicating all establishments working
- Facing Obstacles with Table 4 and Table 5
- Revisiting the questionnaires
- Teams to be selected
- Training the staff and improving skills
- Allocating Funds for conducting field surveys
- Set an Institutional Platform



IV - Main Elements in TSA project (Cont.):

5 - Setting the institutional platform :

- Protocol of Cooperation between MOT and MOED
- TSA Budget and Financial Plan
- Establishing Policy Working Group (PWG)
- Formatting technical working group (TWG)
- Allocation of Funds (self financed by MOT)



V- Launching TSA project in Egypt

Current Situation :

1. Signing in February 2008 a protocol emphasizing partners and their roles
2. Proposing schedule of the project.
3. Selecting the teams and training of staff.
4. Revisiting the questionnaires.
5. A statistical frame indicating the establishments working.



V- Launching TSA project in Egypt (cont.)

What is the Next Step planned during 2008?

1. Approval of Supreme Council of Tourism SCT
2. Formulate the steering committee
3. Construction of Network and Database
4. Implementation of the project.





Thank you for your attention