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

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

• 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)

<table>
<thead>
<tr>
<th>Year</th>
<th>Receipts</th>
<th>Imports</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003/04</td>
<td>5.4</td>
<td>1.3</td>
<td>4.1</td>
</tr>
<tr>
<td>2004/05</td>
<td>6.1</td>
<td>1.4</td>
<td>4.7</td>
</tr>
<tr>
<td>2005/06</td>
<td>7.3</td>
<td>1.6</td>
<td>5.7</td>
</tr>
<tr>
<td>2006/07</td>
<td>8.1</td>
<td>1.9</td>
<td>6.2</td>
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<tr>
<td>2007/08</td>
<td>10.8</td>
<td>2.9</td>
<td>7.9</td>
</tr>
</tbody>
</table>

*Source: Central Bank of Egypt, 2009*

2- Tourism Statistics


<table>
<thead>
<tr>
<th>Source</th>
<th>Million $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist Revenues</td>
<td>10,826.5</td>
</tr>
<tr>
<td>Remittances of Egyptians working abroad</td>
<td>9,637.6</td>
</tr>
<tr>
<td>Suez Canal Dues</td>
<td>515.5</td>
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<tr>
<td>Petroleum Exports &amp; products</td>
<td>14,472.6</td>
</tr>
<tr>
<td>Other Exports</td>
<td>14,883.2</td>
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</tbody>
</table>

*Source: Central Bank of Egypt, 2009*
2- Tourism Statistics


- Imports of services: $12,244.9 million
- Exports of services: $2,721.1 million
- Merchandise Exports: $29,355.8 million
- Tourist Revenues: $10,826.5 million

Source: Central Bank of Egypt, 2009

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2- Tourism Statistics

Distribution of Hotel Capacity (2009)

- Red Sea: 6,783 rooms, 11.8%
- South Sinai: 6,783 rooms, 11.8%
- Luxor & Aswan: 8,396 rooms, 4%
- Floating Hotels: 7,873 rooms, 1.6%
- Nile & North Coast: 5,404 rooms, 4.4%
- Alexandria & Alexandria: 7,463 rooms, 8%
- Saint Carlos Region: 7,463 rooms, 8%
- Upper & Lower Egypt: 2,193 rooms, 0.2%
- Cairo: 20,892 rooms, 13.5%

Source: MOT, 2009
2- Tourism Statistics

Under Construction (2009)

*Source: MOT, 2009*

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2- Tourism Statistics

*Tourist Guides (1999-2008)*

*Source: MOT, 2009*
2- Tourism Statistics

**Travel Agencies (1999-2008)**

![Graph showing trend in travel agencies from 1999 to 2008](image)

*Source: MOT, 2009*

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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 … etc.)
  - 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-administered 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/Eurostat 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

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

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#### TSA Unit Work Plan - 21 months

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<thead>
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<th>Date</th>
<th>08-09</th>
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Thank you for your attention