UNWTO COMMITTEE
ON STATISTICS AND TSA

Eleventh meeting

Madrid, 25-26 March 2010

Presented By: Dr. Adla Ragab
Economic Advisor to the Minister of Tourism

TSA Unit in Egypt in 2008
Implementation Phases:

**Phase one: February 2008**
- Sign a cooperation protocol between MOT & MOED
- Establish an institutional framework of the TSA unit
- Constitute a Steering Committee headed by the two Ministers

**Phase two: June 2008**
- Mobilization of financial and human resources
- Preparation of work plan with job description and duties for staff and technical team

**Phase three: October 2008**
- Collection and processing of data and questionnaires
- Planning of survey sampling and field staff training
- Revision of available data on tourism statistics

**Crisis in 2009**

- In December 2008, Egypt: One of the star performers in the Middle East, with an arrival growth of 15.3%
- In January 2009, Tourism Resilience Committee (TRC) analyses and discuss prospects and best practices.
- TRC stressed that all tourism stakeholders share the responsibility
- Main procedures was taken by Ministry of Tourism in Egypt:
- Increase technical marketing trips in major markets.
- Organize personal contacts with international tourism stakeholders: politicians, governmental, media and tour-operators.
- Intensify co-marketing campaign with international travel agencies and tour-operators in order to increase Egypt’s share in the international tourism flow: from Egypt’s main traditional markets, and emerging markets.
- Increase advertising campaigns seeking different means of publicity in source markets.
- Continue Charter Flights’ Incentive Program in some tourism international airports:
  - Marsa Alam
  - Taba
  - Northern Coast
  - Luxor
  - Aswan
- Continue the ongoing skill development programs to improve quality of services.
Quarterly 2008 - 2009

**Visitors (2008 - 2009)**

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<th>Region</th>
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**Nights (2008 - 2009)**

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**Revenues (2008 - 2009)**

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<td>2.60</td>
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<tr>
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Hotel Capacity (1-12-2009)

Existing Hotel Capacity by Region (214.5 thousand rooms)

- **Red Sea**: 33%
- South Sinai: 32%
- Greater Cairo: 14%
- Luxor & Aswan: 10%
- Alexandria: 4%
- Suez Canal Cities: 3%
- Others: 2%
- Floating Hotels: 8%
Under Construction Hotel Capacity by Region (199.9 thousand rooms)

- Red Sea: 27%
- South Sinai: 28%
- Greater Cairo: 5%
- Luxor & Aswan: 1%
- Alexandria: 32%
- Suez Canal Cities: 4%
- Others: 2%
- Floating Hotels: 1%
- Suez Canal Cities: 4%

As a Result in December 2009

- Tourist arrivals (12.5 mn) have declined only: 2.3%
- Tourist Nights (126.5 mn) have declined only: 2.1%
- Revenues (10.76 US$bn) have decreased: 2.1%
- Average stay length remains almost the same: 0.2%
- No evidence on reducing labour or tourism workers dismissal
Egypt : Inbound Tourism & Revenues

Yearly 1999 - 2009

<table>
<thead>
<tr>
<th>Year</th>
<th>Inbound Tourism (Million)</th>
<th>Revenues ($ Billion)</th>
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<tbody>
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<td>1999</td>
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<td>2000</td>
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TSA Unit in Egypt In 2009
Implementation Phases:

Phase Four: January 2009

1 - Conducting tourism field surveys:
   * *on the demand side*: (TSA tables: 1 to 4)

2 - Inbound/domestic/outbound surveys
   * *on the supply side*: (TSA tables: 5 to 6)

In addition to some supplementary surveys to complete the N.A. data in the informal sector

3 - Employment survey: (TSA table 7)

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**TABLE 1**

- **Total Population:**
  - 12.5 million Non-resident Foreign Visitors
  - 607,000 Non-resident Egyptian Visitors
  - 634,000 Same-day Visitors

- **Sample Size:**
  - 60,000 Non-resident Foreign Visitors (0.05%)
  - 10,000 Non-resident Egyptian Visitors (1.5%)
  - 2,600 Same-day Visitors (0.5%)

- **Surveys ‘Methodology’:**
  - Questionnaire for Departing Visitors on 4 quarters
  - Questionnaire for Departing Egyptian Visitors (living abroad) on 4 quarters
  - Questionnaire for Same-day Visitors.
  - Questionnaire for Tour Operators.
**TABLE 2**

- **Total Population:**
  - 17.5 m Egyptian Household (2006 CENSUS)
  - 21,000 Resident Expatriates with working permission

- **Sample Size:**
  - 24,000 Egyptian household
  - 539 Resident Expatriates
  - Survey of government, public and private sector and syndicates

- **Surveys Undertaken:**
  - Domestic tourism expenditure questionnaire “4 quarters”.
  - Domestic tourism expenditure questionnaire for Resident Expatriates.
  - Trips provided by producers for the benefit of their employees

**TABLE 3**

- **Total Population:**
  - 4,982,942 Egyptians traveling abroad (Different Purposes)

- **Sample Size:**
  - 3000 Egyptians traveling abroad (Different Purposes)

- **Surveys Undertaken:**
  - Questionnaire for Egyptians traveling abroad from all exit ports (AIR, MARİTIME, LAND) includes at least one overnight stay.

*Table 4: under construction*
### TABLE 5

- **Total Population:**
  - 360,624 informal private sector and non-profit organizations

- **Sample Size:**
  - 3409 informal private sector establishments and non-profit organizations.

- **Surveys Undertaken:**
  - Cultural, social, recreational and sports services
  - Informal private restaurants & coffee shops
  - Informal private sector road & river transport activities

*Table 6: under construction*

### TABLE 7

- **Methodology of Surveys Undertaken:**

  Full population of tourism employment on the following sectors:

  - Accommodation Establishments
  - Travel Agencies
  - Restaurants
  - Tourism Commodities
  - Diving and Marine Activities
  - Comprehensive Field surveys
Awareness Workshop
TSA as A Statistical Tool for the Provision of Consistent Economic Evaluation of Tourism Activities
TSA Workshop in January 2010

Purpose: Elaborate the importance of TSA in Egypt as:

• a new economic and statistical tool needed to measure the contribution of the tourism sector in the national economy
• to determine the size of economic sectors that are not defined as related industries in the National Accounts System
• To be able to compare: countries/sectors in the economy

Recommendations

• Fiscal vs. Calendar year as a period of reference

• Cross classification of results by region of origin, purpose of visit, characteristics of visitors, etc.

• Implementation of an efficient quota system in Table 2

• Meeting challenges in statistical measurement of economic data of the informal sector overrun

• Using more simplified questionnaire, applying it in various moments of the year to obtain insight on seasonality.
Phase Five: March – May 2010
- Analysis of data and TSA tables construction
- Publish preliminary results and questionnaires

Phase Six: June – December 2010
- Compilation and analysis of results
- Submission of the final report
- Translate the report in English

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