



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*

"speechless,
I stood before this wonder..."

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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

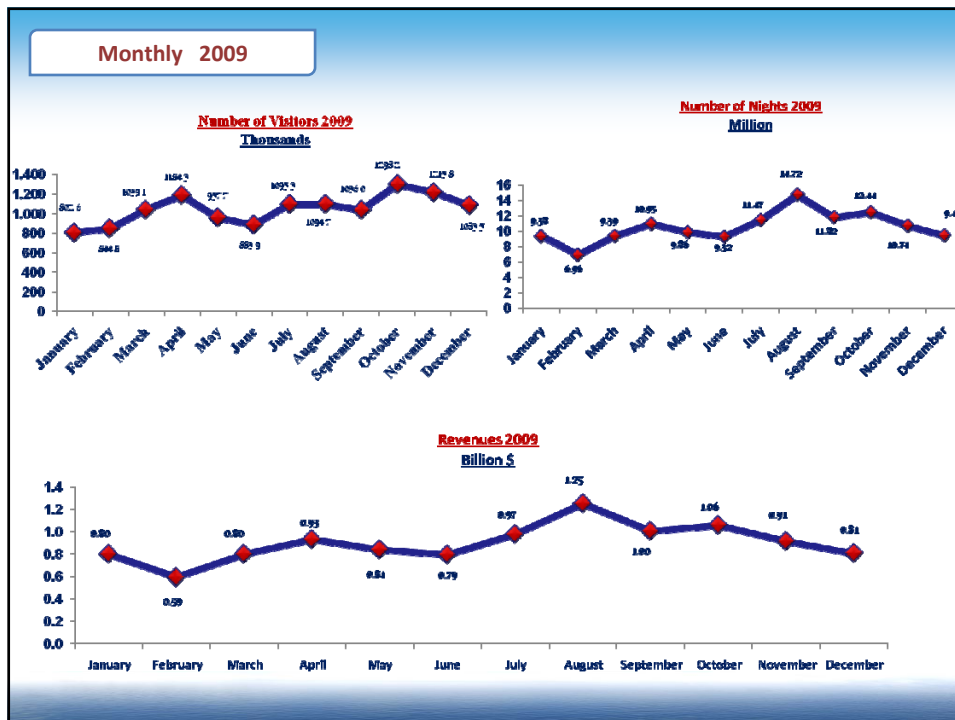
Phase three: October 2008

- Collection and processing of data and questionnaires
- Planning of survey sampling and field staff training
- Revision of available data on tourism statistics

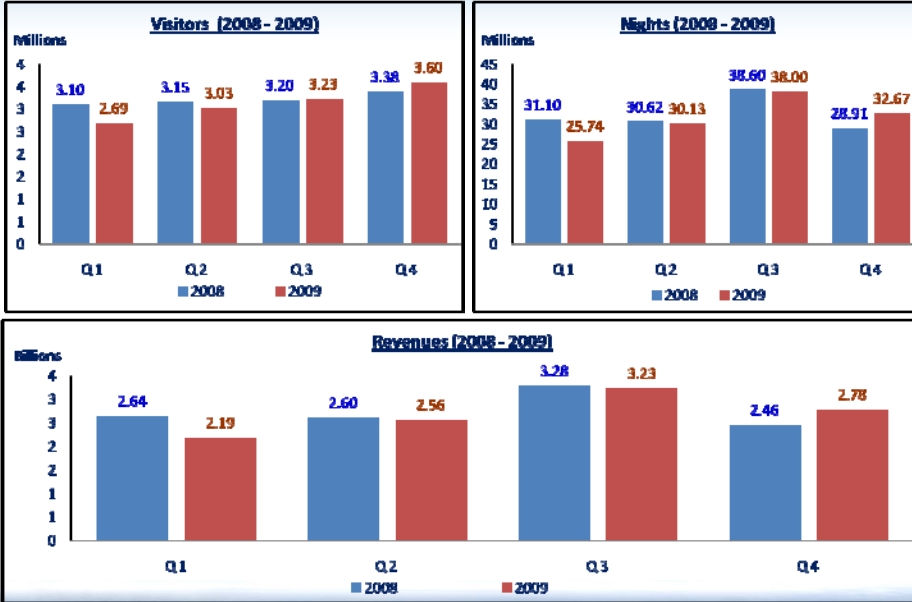
Crisis in 2009

- 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.

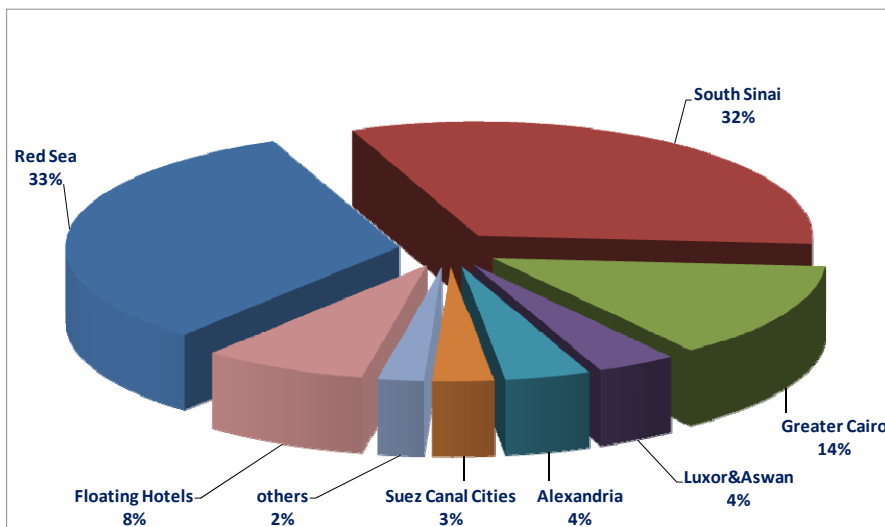


Quarterly 2008 - 2009



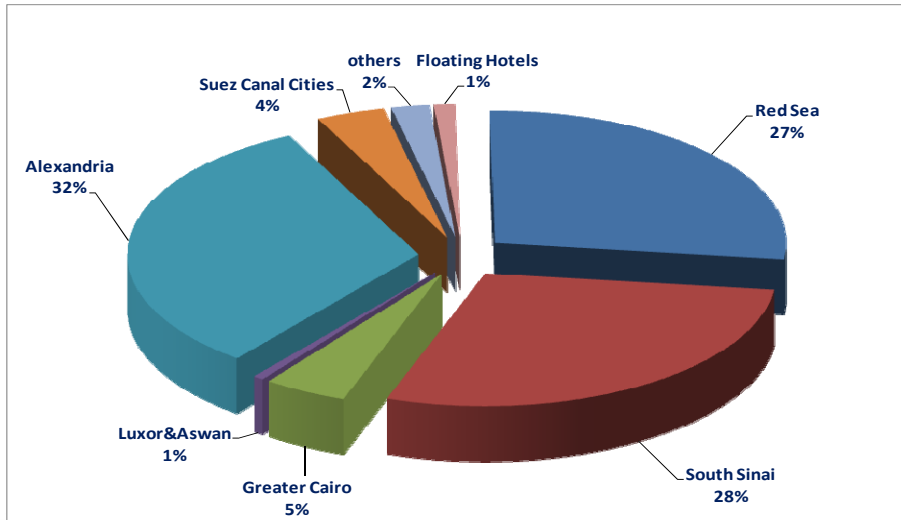
Hotel Capacity (1-12-2009)

Existing Hotel Capacity by Region (214.5 thousand rooms)



Hotel Capacity (1-12-2009)

Under Construction Hotel Capacity by Region (199.9 thousand rooms)



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

Yearly 1999 - 2009

Egypt : Inbound Tourism & Revenues



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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)

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, MARITIME, 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 :


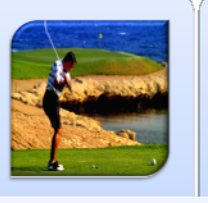
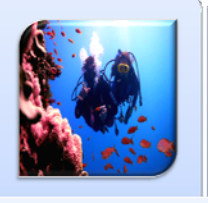
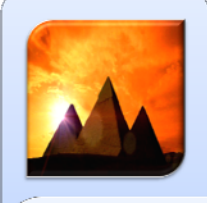

Full population of tourism employment on the following sectors:

- Accommodation Establishments
- Travel Agencies
- Restaurants
- Tourism Commodities
- Diving and Marine Activities
- Comprehensive Field surveys

"Abu Simbel took our breath away..."



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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 overtime**
- **Using more simplified questionnaire, applying it in various moments of the year to obtain insight on seasonality.**

What Next?

☐ *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



Thank You

for more information
adlaragab@tourism.gov.eg