



Tourism Satellite Accounts: The Case of Egypt

UNWTO Committee on Statistics and TSA

Twelfth Meeting
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WHY TSA FOR EGYPT?

Tourism is among the leading sectors in the Egyptian economy:

- Chief contributor to GDP growth.
- Major job provider.
- Principal generator of foreign exchange earnings and public revenues.
- Main achiever of balanced spatial development.

HOWEVER

The current national tourism statistical system does not reflect the real significance of tourism to the Egyptian economy.

TOURISM DATA LIMITATIONS

Incomplete

Fragmented

Inconsistent



- H&R only
- Hotel Residents
- Inbound Tourism
- Licensed Establishments
- Full-time Workforce
- Hotel & Tourist Villages Investments

TOURISM DATA LIMITATIONS

Incomplete

Fragmented

Inconsistent

- Local Administration
- Private Associations
- Official Bodies
(MOT, CBE, CAPMAS, GAFI, MOED, etc...)

TOURISM DATA LIMITATIONS

Incomplete

Fragmented

Inconsistent

Differences in:

- Coverage
- Methodology

THE INSTITUTIONAL PLATFORM

Launching the TSA Project

- Conclusion of Protocol of cooperation (MOT & MOED) – Feb. 2008
- Issuance of MOT Ministerial Decree
- Creation of MOT specialized unit for TSA project

Establishing the Policy Working Group (PWG) “Steering Committee”

Forming the Technical Working Group (TWG)

KEY PLAYERS

Data Producers

- Ministry of Tourism
- Ministry of Econ. Development
- CAPMAS*
- IDSC**
- Central Bank of Egypt
- Passport & Immigration Authority of the Ministry of Interior (MOI).
- Ministries: Civil Aviation, Transport, Culture, Environment Manpower & Immigration, Finance and the Supreme Council of Antiquities.

Data Users

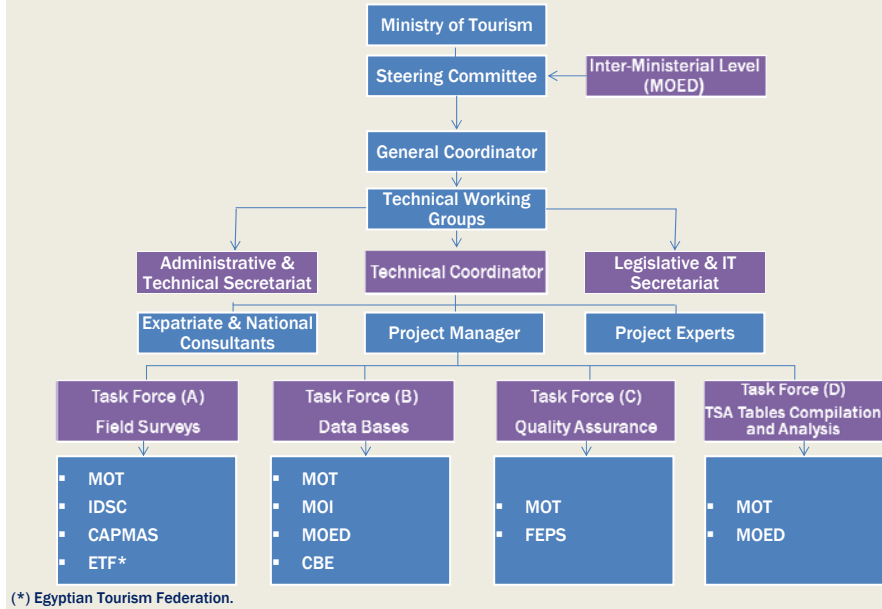
- Tourism affiliated bodies and federations.
- Universities and research institutions.
- Investors in the Tourism Business.
- Governmental bodies.

Quality Assurance Bodies

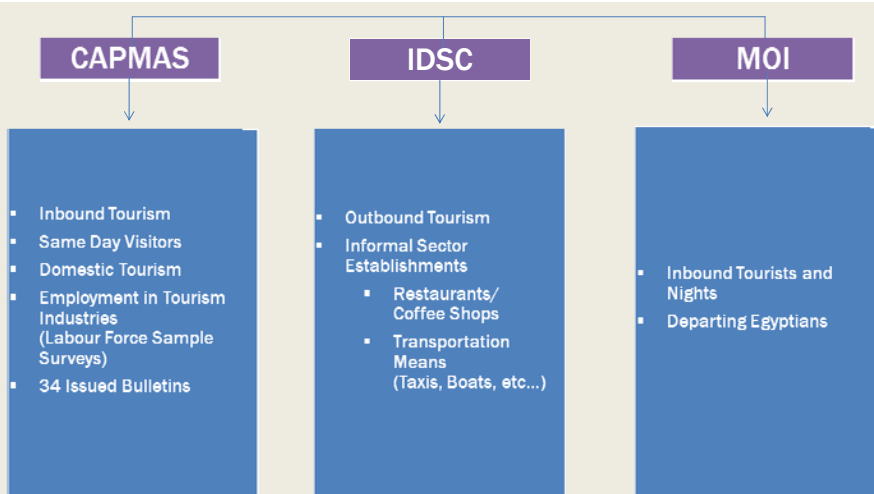
- Centre for Survey and Statistical Applications (CSSA), Faculty of Economics and Political Science, Cairo University

(*) Central Agency for Public Mobilization and Statistics.
(**) Cabinet's Information and Decision Support Center.

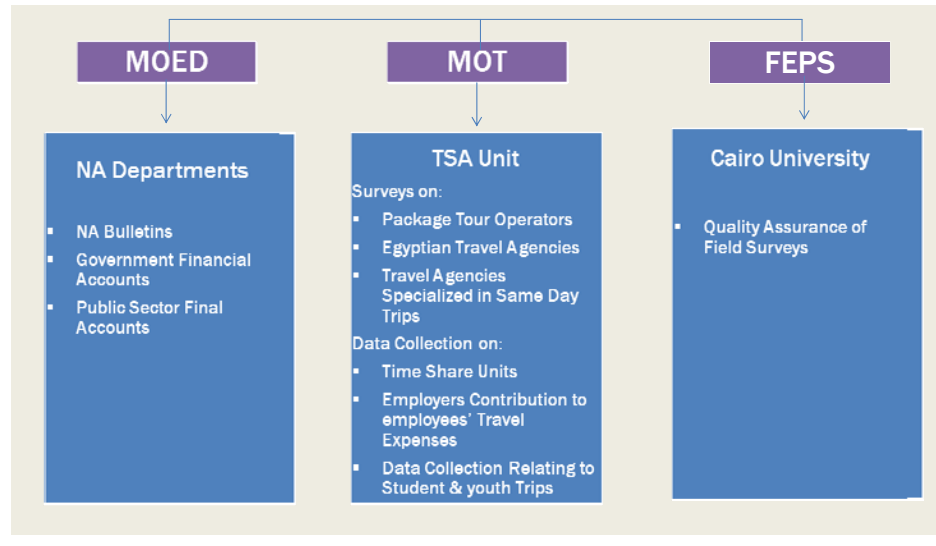
Organizational Structure of the TSA Project



DATA SOURCES (I)



DATA SOURCES (II)



THE DEMAND SIDE

Basic Principles:

- Product classification in accordance with CPC, Version 2
- Expenditure estimates at purchaser's price
- Distinction between accommodation services and other services provided by the same entity

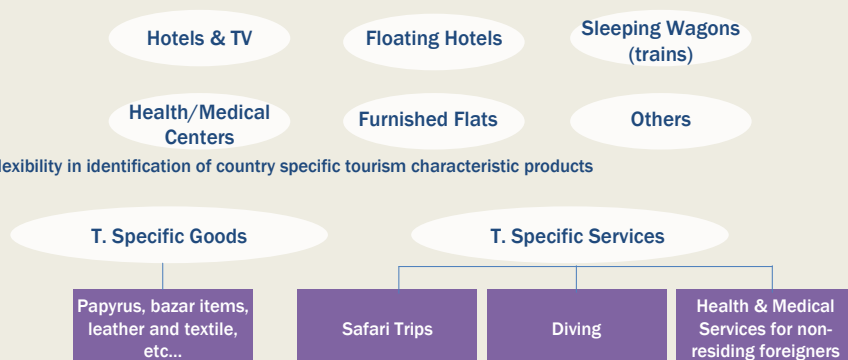




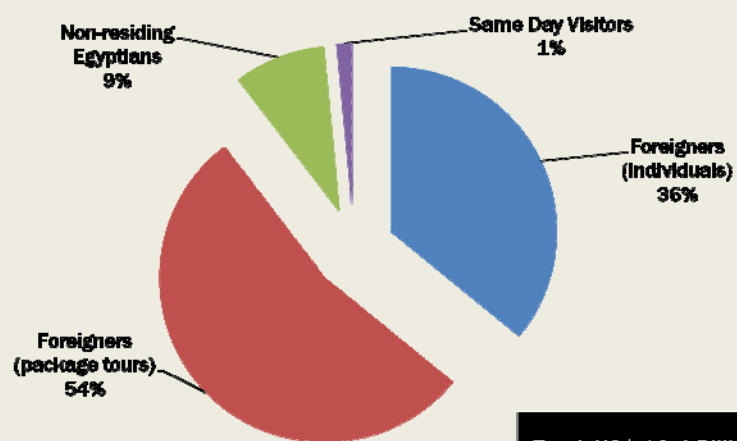
TABLE (1)
INBOUND TOURISM EXPENDITURE



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INBOUND TOURISM EXPENDITURE

Overnight Foreign Tourists		Same Day Visitors	Non-residing Egyptians
Individuals	Package Tours	Package Tours	Individuals
Universe:	12.5 Million	622,336	936,905
Sample Size:	120,770	3,775	11,952

INBOUND TOURISM EXPENDITURE BY TYPE OF VISITOR

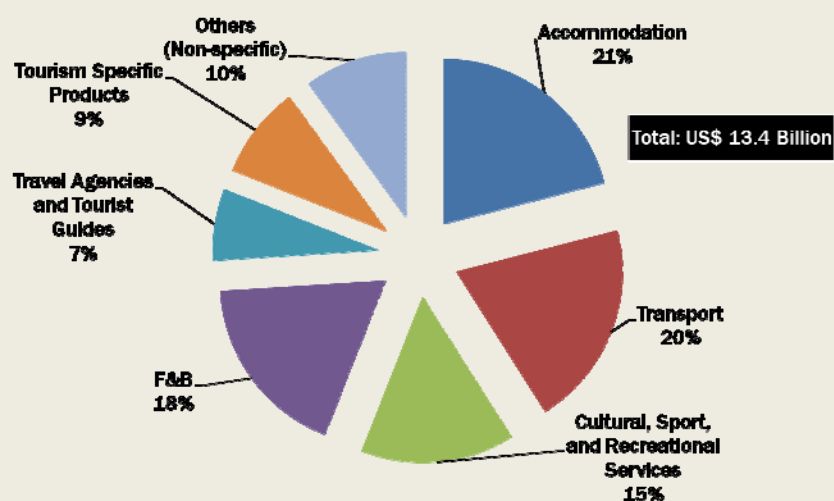


Source: Inbound Tourism Surveys, 2009.

AVERAGE EXPENDITURE OF VISITORS (PER NIGHT)

	(US\$/Night)	
	Excluding International Transport	Including International Transport (only national carriers)
1. Foreign Visitors		
A. Individuals	101.3	118.9
B. Package Tours	81.8	86
Average (1A and 1B)	87.9	97.2
2. Average expenditure (including same day visitors)	89.2	98.4
3. Non-residing Egyptians (individuals)	26.8	29.9

INBOUND TOURISM EXPENDITURE BY PRODUCT GROUP



Source: Inbound Tourism Surveys, 2009.

COMPARISON BETWEEN TSA & BOP TRAVEL ITEM

Average daily visitor expenditure (\$)

TSA = 89.2

BOP Travel Item = 85.0

(US\$ Billion)

Revenues	TSA	BOP Travel Item
International Visitors	11.02	10.8
International Transport Earnings (national carriers)	1.0	–
Non-residing Egyptian's Expenditure	1.2	–

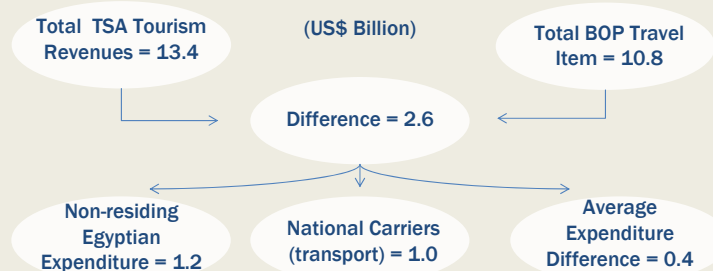
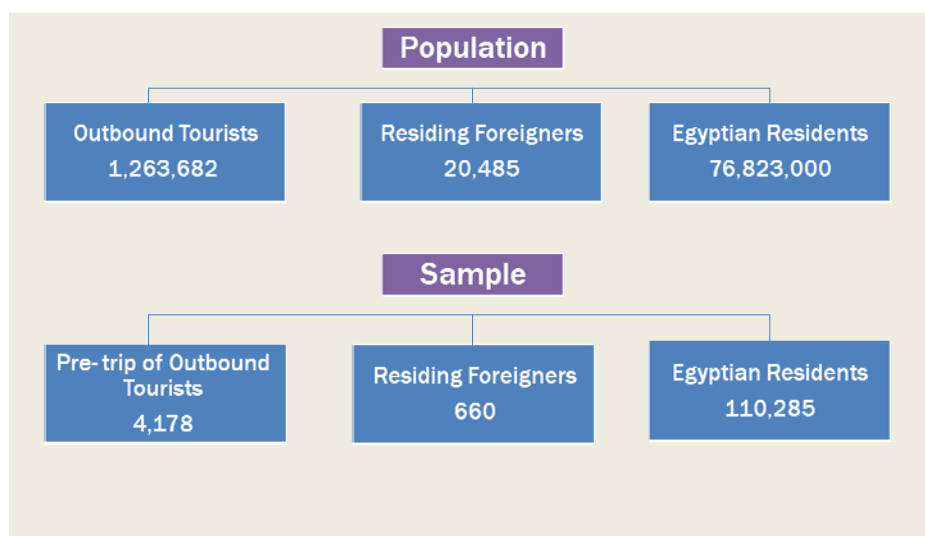




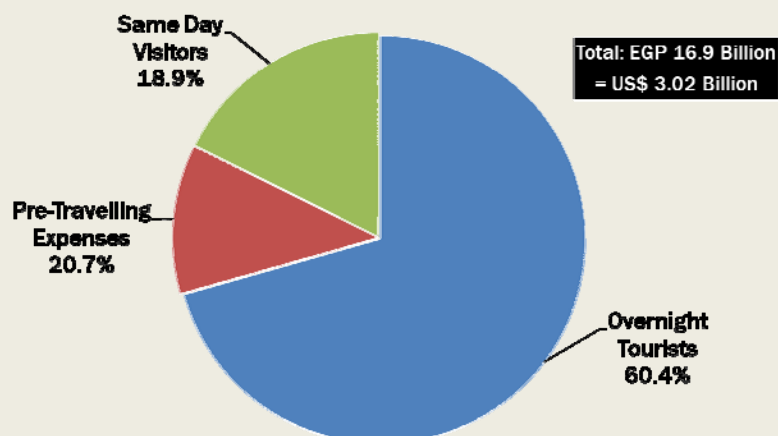
TABLE (2)
DOMESTIC TOURISM EXPENDITURE



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DOMESTIC TOURISM

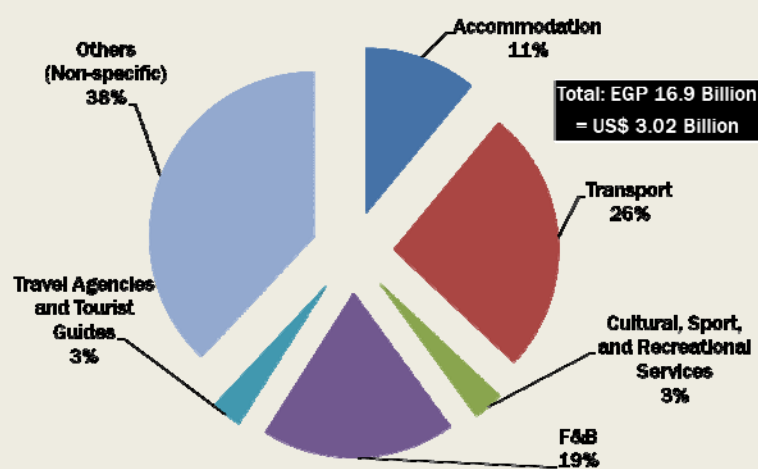


RELATIVE DISTRIBUTION OF DOMESTIC TOURISM EXPENDITURE



Source: Domestic Tourism Survey and Outbound Tourism Survey, 2009.

DOMESTIC TOURISM EXPENDITURE BY PRODUCT GROUPS



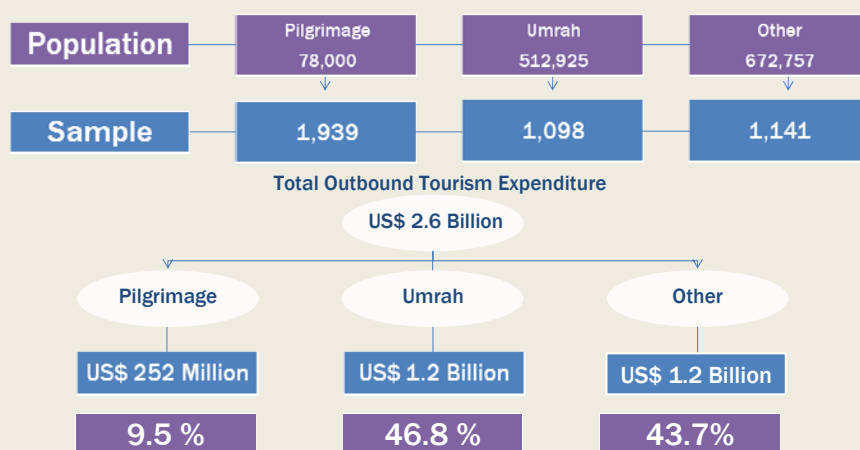
Source: Domestic Tourism Surveys and Outbound Tourism Surveys, 2009.



TABLE (3)
OUTBOUND TOURISM EXPENDITURE



TABLE (3)



Source: Outbound Tourism Surveys, 2009.



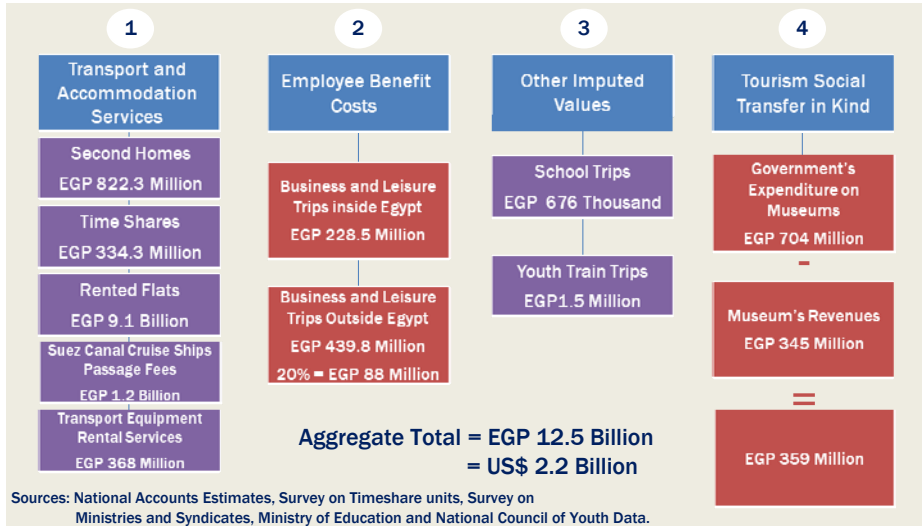
TABLE (4)
INTERNAL TOURISM CONSUMPTION



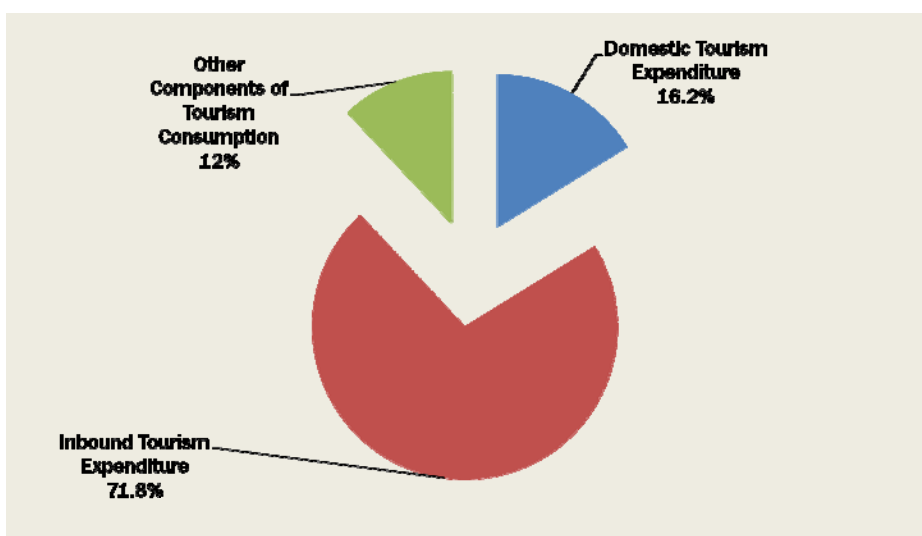
TABLE (4)
THE DEMAND STRUCTURE



OTHER COMPONENTS OF TOURISM CONSUMPTION



INTERNAL TOURISM CONSUMPTION BY TYPE





**TABLE (5)
PRODUCTION ACCOUNTS
OF TOURISM AND OTHER INDUSTRIES**



**TABLE (5)
PRODUCTION ACCOUNTS OF TOURISM
& OTHER INDUSTRIES**

Products/Services	Tourism Characteristic Industries	Other Industries	(EGP Billion)
			Output of Domestic Producers
Accommodation	35.1	0	35.1
Food and Beverage	38.8	0	38.8
Transportation	61.6	0	61.6
Travel Agency & other Reservation Services	6.0	0	6.0
Cultural , Sport, and Recreational	20.4	0	20.4
Country Specific Tourism Characteristic Products	5.3	0	5.3
Other Products/Services	34.3	1503.3	1537.6
Total Output	201.5	1503.3	1704.8
Total Intermediate Consumption	73.1	559.3	632.4
Total Gross Value Added	128.4 = US\$ 22.9 Billion	944 = US\$ 168.6 Billion	1072.4 = US\$ 191.5 Billion

Source: National Accounts Data.

GROSS VALUE ADDED BREAKDOWN IN THE TOURISM INDUSTRY

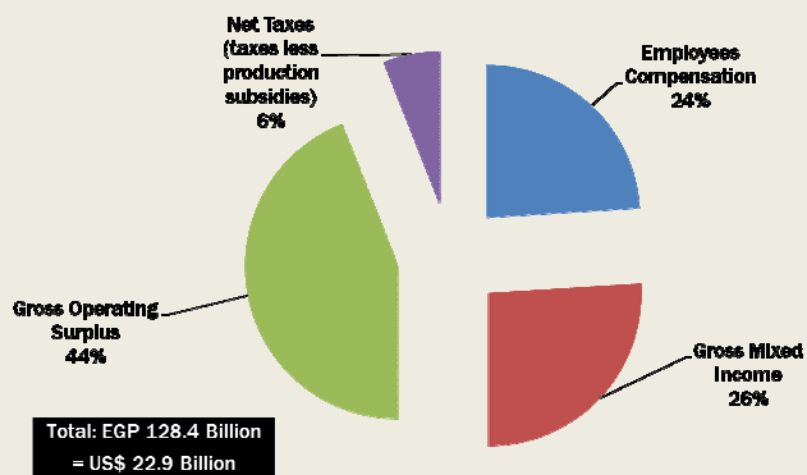


TABLE (6)
TOTAL DOMESTIC SUPPLY
& INTERNAL TOURISM CONSUMPTION
BY PRODUCTS (AT PURCHASERS' PRICES)



TABLE (6)
DOMESTIC SUPPLY & INTERNAL TOURISM CONSUMPTION AT PURCHASERS PRICES*

(EGP Billion)

Products/Services	Domestic Supply	Internal Tourism Consumption	Tourism Product Ratio (%)
Accommodation	36.8	28.0	76.1
Food and Beverages	39.7	16.7	42.1
Transportation	70.3	21.4	30.4
Travel Agency and Other Reservation Services	6.1	5.5	90.2
Cultural, Sport, and Recreational	21.0	11.8	56.2
Country Specific Tourism Characteristic Products	7.4	7.2	97.3
Other Products/Services	1874.0	13.6	0.7
Total Output	2055.3 = US\$ 367 Billion	104.2 = US\$ 18.6 Billion	5.1

*Purchasers Prices include values at basic prices plus net taxes on products and trade margins.
Source: National Accounts Data and Tourism Surveys.

TABLE (6)
DERIVATION OF TOURISM INDUSTRY RATIOS, 2009

(EGP Billion)

Products	TOURISM INDUSTRIES							Other Industries	Output of Domestic Producers (at basic prices)
	Accommodation	Food & Beverages	Transport	Travel Agencies	Cultural, Sport & recreational Industry	Country Specific Tourism Characteristic Industries	Total		
Accommodation	32.9	0	0.1	0	0.1	1.9	35.1	0	35.1
F&B	10.3	25.6	0.1	0	0.4	2.4	38.8	0	38.8
Transport	1.2	0	59.7	0	0.6	0.2	61.6	0	61.6
Travel Agencies	0	0	0	6	0	0	6.0	0	6.0
CSRS	0.4	0	0	0	20.0	0	20.4	0	20.4
CSTCP	0	0	0	0	0	5.3	5.3	0	5.3
Other Products	0.9	0	31.6	0.1	0	1.6	34.3	1503.3	1537.6
Total Output (at basic prices)	45.8	25.6	91.5	6.1	21.1	11.5	201.5	1503.3	1704.8
Tourism Share (in value)	34.8	10.7	27.8	5.5	11.8	11.1	101.7	10.5	112.2
Tourism Ratio (%)	76.1	42.0	30.4	90.1	55.9	96.2	50.5	0.7	6.6

Source: National Accounts Data and Tourism Surveys.

TOURISM DIRECT GROSS VALUE ADDED AND TOURISM DIRECT GROSS DOMESTIC PRODUCT

	(EGP Billion)	(US\$ Billion)
Total Supply of Goods & Services (domestic)	2055.4	367.04
(-) Imports of Goods & Services	299.1	53.4
(-) Net Taxes on Products (taxes less subsidies)	51.41	9.2
= Total Domestic Supply of G&S (output of domestic producers)	1704.8	304.4
(-) Intermediate Consumption	632.4	112.9
= Gross Value Added of the Economy	1072.4	191.5
Gross Value Added of the Tourism Industries	128.4	22.9
GVATI (%)	12%	12%
Total Tourism Output	99.3	17.7
(-) Total Tourism Intermediate Consumption	42.2	7.5
= Tourism Direct Gross Value Added	57.2	10.2
TDGVA (%)	5.3%	5.3%
(+) Tourism Share of Net Taxes on Products	4.0	0.7
= Tourism Direct Gross Domestic product (TDGDP)	61.2	10.9
TDGDP (%)	5.4%	5.4%

Source: TSA-Table 6 Results.

MAJOR AGGREGATES

	(EGP Billion)	(US\$ Billion)
Internal Tourism Consumption	104.2	18.6
Internal Tourism Expenditure	91.7	
Other Components of Tourism Consumption	12.5	
Gross Value Added of the Tourism Industries	128.4	22.9
Tourism Direct Gross Value Added	57.2	10.2
Tourism Direct Gross Domestic Product	61.2	10.9
(%)		
Tourism Industries Contribution to GDP	12	
Tourism Direct Contribution to GDP		
TSA Results	5.4	
MOED Results (H&R only)	3.5	



TABLE (7)
EMPLOYMENT IN THE TOURISM
INDUSTRY



TABLE (7)
EMPLOYMENT IN THE TOURISM INDUSTRIES

(Thousand)

TOURISM INDUSTRIES	Number of Jobs by Status in Employment			Labour Hours	Number of fulltime Equivalent Jobs	(%)
	Employees	Self Employed	Total			
Accommodation	139.6	4.0	143.6	390,868.4	156.6	10.4
F&B	180.5	85.3	265.8	758,721.6	304.0	20.2
Railways Passenger Transport	69.2	0	69.2	170,716.0	68.4	4.6
Road Passenger Transport	394.0	295.2	689.2	1,935,180.0	775.3	51.5
Water Passenger Transport	24.2	0.7	24.9	69,102.8	27.7	1.8
Air Passenger Transport	32.7	0	32.7	80,516.8	32.3	2.1
Transport Equipment Rental	1.1	1.7	2.8	7,420.4	3.0	0.2
Travel Agencies & Other Reservation Services	66.4	6.1	72.5	197,750.8	79.2	5.3
Cultural Industry	9.2	2.1	11.3	25,656.8	10.3	0.7
Sports and recreational Industry	8.8	9.2	18.0	50,164.4	20.1	1.3
Retail Trade of Country-Specific Tourism Characteristic Goods	5.0	3.0	8.0	22,245.6	8.9	0.6
Country Specific Tourism Industries	17.3	1.2	18.5	47,933.6	19.2	1.3
Total	948.0	408.5	1,356.5	3,756,277.2	1,504.9	100.0

Source: Labour Force Survey, 2009.

MAIN INDICATORS OF TABLE (7)

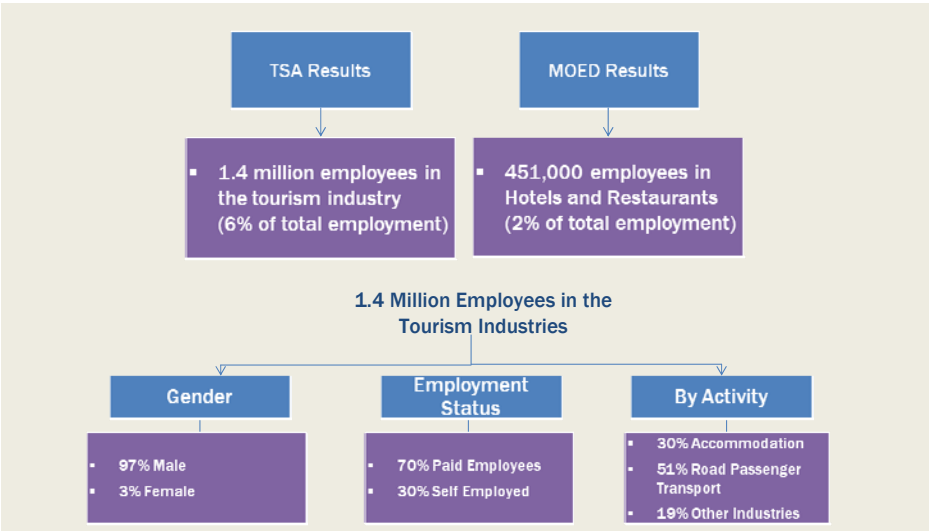


TABLE (10)
NON-MONETARY INDICATORS



TABLE (10)
A. NUMBER OF TRIPS & OVERNIGHTS BY FORM OF TOURISM
& CLASS OF VISITORS

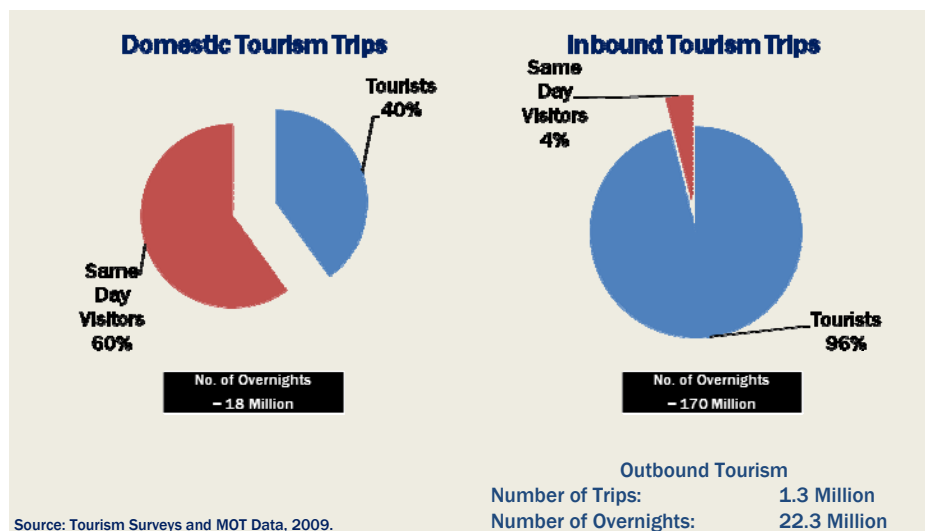


TABLE (10)
B. INBOUND TOURISM: NUMBER OF ARRIVALS & OVERNIGHTS BY MODES
OF TRANSPORT

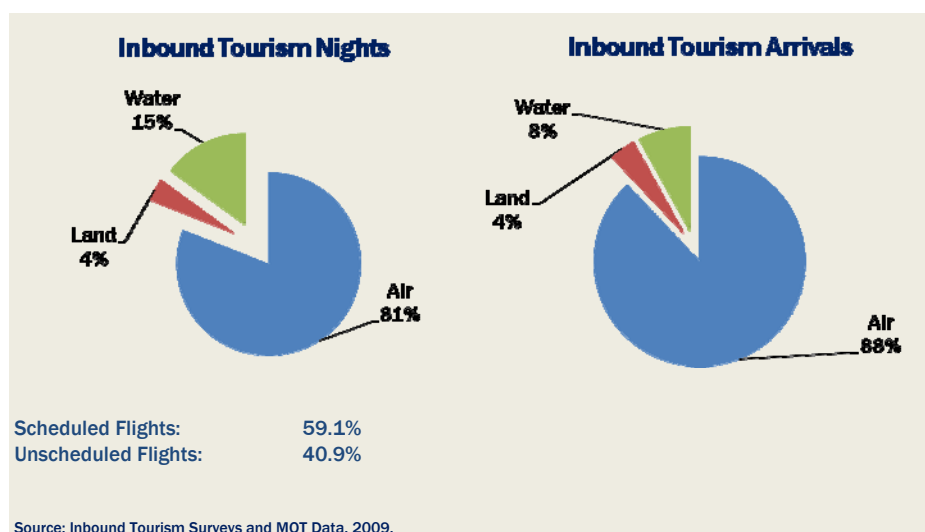


TABLE (10)
C. NUMBER OF ESTABLISHMENTS & CAPACITY
BY TYPES OF ACCOMMODATION

Accommodations	Number of Establishments	Capacity (rooms)	Capacity (beds)	Room Capacity Utilization Rate (%)
Hotels and Similar	1458	214,533	429,066	68.7%
Real Estate Activities	1,019,380	-	-	-
A. Property Real Estate Activities (Own or Lease)	1,012,000	-	-	-
B. Real Estate Activities on a Fee or Contract (Time Share)	7,380	-	-	-

Source: MOT Data and National Accounts Data, 2009.