Regional Tourism Statistics in Egypt

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Necessary Basic Data & Indicators to Measure Regional Tourism

“It should nevertheless be pointed out that all the countries have equally relevant experiences in terms of the measurement and analysis of tourism at sub-national levels”.

Massieu, INRoute, December 2012

In EGYPT
- Border Survey ✓
- Domestic Tourism Household survey ✓
- Accommodation Survey X BUT Administrative RECORDS ✓
- Structural Business Survey X
- Annual Estimates of Resident Population ✓
- Arrivals by air and slot allocation figures ✓
Where is the bottle neck??

- Good coordination vs Lack of coordination
- Well designed Surveys vs General surveys
- Good use of Data (well dig for data)
  vs
  Simple use of data
- Institutional set up (Committee of Stakeholders)
  vs
  One Man Show

Why Regional Statistics is Important??

<table>
<thead>
<tr>
<th>Users</th>
<th>Stakeholders, Private Investors, Politicians, and Decision Makers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Coverage</td>
<td>Not only Official Statistical Sources (Surveys/Geo-references)</td>
</tr>
<tr>
<td>Data Quality</td>
<td>Reliability - Consistency - Coherence</td>
</tr>
<tr>
<td>Multiple Geographical Views</td>
<td>Governorate Level</td>
</tr>
<tr>
<td></td>
<td>Tourism Destination Level</td>
</tr>
<tr>
<td>Roles &amp; Partnership</td>
<td>Institutional Set-up (Inter-Ministerial+Technical Working Group)</td>
</tr>
<tr>
<td></td>
<td>Cooperation with Governorates</td>
</tr>
<tr>
<td>Funding</td>
<td>Sustaining Funding Requirements/Private Sectors</td>
</tr>
</tbody>
</table>
Regional Tourism Statistics

Current Situation

Demand
- Inbound Tourism Survey
- Domestic Tourism Survey
- EHCAAN* Data
- Governorates Administrative Data

Supply
- Tourism Establishments Surveys
  Accommodation Survey
- ETF Administrative Data
- Business Registers (Hotels, Travel Agents)
- Labour Force Survey (Employment in Tourism Industries)

Harmonization
- Full Consistency with National Tourism Statistics

Visitor profile
Trip Characteristics
Tourism Expenditure
Opinions, Attitudes, Views

Governorate

<table>
<thead>
<tr>
<th>Governorate</th>
<th>Inbound</th>
<th>Domestic</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>intra-region</td>
<td>inter-region</td>
</tr>
<tr>
<td>A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Egyptian Holding Company for Airports and Air Navigation
Please specify the total nights according to the place of stay in the visited areas:

<table>
<thead>
<tr>
<th>Place of stay</th>
<th>Accommodation Type</th>
<th>Total No. of Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cairo &amp; Giza</td>
<td>Hotel</td>
<td></td>
</tr>
<tr>
<td>Luxor</td>
<td>Hotel</td>
<td></td>
</tr>
<tr>
<td>Aswan</td>
<td>Hotel</td>
<td></td>
</tr>
<tr>
<td>Alexandria, North Coast &amp; Matrouh</td>
<td>Hotel</td>
<td></td>
</tr>
<tr>
<td>Red Sea</td>
<td>Hotel</td>
<td></td>
</tr>
<tr>
<td>South Sinai</td>
<td>Hotel</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>Hotel</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td>&quot;mention&quot;</td>
<td></td>
</tr>
</tbody>
</table>

Inbound Survey

Trips which were taken by family and non-family members within the country boundaries during the past three months:

101: During the past three months, did you or any member of your family move out of your place of "usual" residence with the purpose of taking a domestic tourism trip - i.e. one day visit or visit relatives and friends?

Yes. 1  No. 2

<table>
<thead>
<tr>
<th>Trip No.</th>
<th>Main Destination</th>
<th>Date</th>
<th>Main Purpose of The Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>102a 102b</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Which region / governorate did you visit?

<table>
<thead>
<tr>
<th>Region</th>
<th>Governorate</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>02</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>03</td>
<td></td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
</tr>
</tbody>
</table>

What was the main purpose of your trip?

Leisure & recreation
Visiting relatives & friends
Business tourism
Fairs & conferences
Therapeutic tourism
Religious tourism
Others

During which month did you take this trip?

1 2 3 4 5 6 7
Pilot RTStatistics: Red Sea Governorate

Population: 329000,
62% Male    38% Female
Area : 119000km²
Nb. of Cities: 6
- Ras Gharib
- Hurghada
- Safaga
- Qusier
- Marsa Alam
- Shalatin

Why Red Sea Governorate?
Destination with different Tourism Products:
- Recreational/Historical/Religious/Therapeutic/Safari & Adventure
- 35% of Existing Accommodation Capacity
- 26% of the Under Construction Accommodation Capacity
- 2 International Airports
- 2 Maritime /Sea Sports
- Good Roads and Infrastructure
Inbound Tourism

Number of Visitors of The Red Sea Governorate During (2010-2014)

- 2010: 4.6
- 2011: 3.3
- 2012: 3.9
- 2013: 3.3
- 2014: 4.1

Number of Nights of The Red Sea Governorate During (2010-2014)

- 2010: 36.9
- 2011: 26.8
- 2012: 31.5
- 2013: 26.0
- 2014: 37.8

Source: Monthly Report of The Red Sea governorate, Different Years

Number of Visitors According to Top Nationalities of The Red Sea Governorate During (2010-2013)

- Poland: 142.6, 199.5, 266.9
- UK: 147.6, 138.0, 141.8
- Italy: 191.8, 273.5, 313.0
- Germany: 604.5, 800.5, 809.9
- Russia: 1,158.8, 1,282.1, 1,305.6

Source: Monthly Report of The Red Sea governorate, Different years
**Tourist’s Characteristics**

Relative distribution of The Red Sea Tourists by Gender During 2013

- Male: 47%
- Female: 53%

Relative distribution of The Red Sea Tourists by Income Categories During 2013

- Less than 10000 US$: 23.6%
- 10000- less than 50000 US$: 53.8%
- 50000- less than 100000 US$: 17.0%
- More than 100000 US$: 5.7%

Relative distribution of The Red Sea Tourists by Frequency of Visit During 2013

- Once: 24.6%
- Twice: 25.9%
- Three times & more: 21.4%
- 20-30: 16.8%
- 30-40: 11.4%

Relative distribution of The Red Sea Tourists by Income Categories During 2013

- Less than 10000 US$: 23.6%
- 10000- less than 50000 US$: 53.8%
- 50000- less than 100000 US$: 17.0%
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**Inbound Tourism**

- 9.2 Night / Visitor
- 58.1 US $ / Night
- 28% of Total Tourism Revenues

**Average Length of Stay**

- 58.1 US $ / Night

**Average Expenditure**

- 9.2 Night / Visitor

**The Relative Importance of Tourism Revenues**

- 28% of Total Tourism Revenues

Source: The Inbound Tourism Expenditure Survey, CAPMAS, Tourism Satellite Account Unit, Ministry of Tourism
Tourist’s Characteristics

The Relative Distribution of Inbound Tourism Expenditure by basic components, 2013

- Accommodation: 21%
- Transportation: 17%
- Food & Beverage: 12%
- Culture, Sport & Recreational services: 8%
- Travel agencies & Tourism Guides Services: 4%
- Tourism Specific Products: 3%
- Others (Non-Specific): 13%

Source: Tourism Satellite Account Unit, Ministry of Tourism

Domestic Tourism 2013

- Visiting family and recreation friends: 51.8%
- Entertainment and recreation: 21%
- Therapy: 11.1%
- Business: 5%
- Other: 3%

Others include: shopping, exhibitions, conferences, social occasions...

Source: Tourism Satellite Account Unit, Ministry of Tourism
Contribution of Different Forms in Tourism Consumption

Source: Tourism Satellite Account Unit, Ministry of Tourism

The International Air Movement

The Air Movement of Departing Passengers During (2010-2013)

The Air Movement of Departing Aircraft During (2010-2013)

Hotel Capacity Distribution

Number of Hotels according to Cities of The Red Sea Governorate During 2013

- Marsa Alam: 50
- Quseir: 17
- Safaga: 45
- Hurghada: 143

Number of Rooms according to Cities of The Red Sea Governorate During 2013

- Marsa Alam: 10.3
- Quseir: 3.1
- Safaga: 15.0
- Hurghada: 42.4

Number of Beds according to Cities of The Red Sea Governorate During 2013

- Marsa Alam: 19.4
- Quseir: 6.0
- Safaga: 26.7
- Hurghada: 83.4

Source: Monthly Report of The Red Sea Governorate, Different Years

Tourism Activities

The Number of Visitors According to Activities During (2010-2012)

- Diving: 1.4, 1.3, 1.4
- Snorkeling: 0.7, 0.8, 0.8
- Safari: 0.1, 0.1, 0.1
- Other: 0.1, 0.1, 0.1

Source: Monthly Report of The Red Sea Governorate, Different Years
Employment in The Red Sea Governorate

Number of Employees in Tourism Industries of The Red Sea Governorate During (2010-2013)

Thousands

2010 2011 2012 2013

Marsa Alam 8.3 8.0 9.9
Qusier 2.5 2.2 3.2
Safaga 12.2 12.3 14.4
Hurghada 33.9 37.4 42.9

Challenges

- Disaggregation of Expenditure on Multi-Destinations Trips
  Some difficulties when estimate Visitor expenditure by destination (For example, some overnight Visitors to Red Sea travel to visit Luxor on over day trips)

- Disparity of Administrative Data for Employment in Hotels and TSA Data on Tourism Employment
  The difficulty arises from different methodology of data collection; Governorates collect their data from tourism establishments (Full Time Workforce, while TSA depends on (Households survey) for employment data (Full Time Equivalent).

- Variation of Airports Data (Visitors/Travelers/Excursionists)
  Airports provide total data on arrivals and departures regardless of purpose of travel/visit.

- Lack of Regional Production Accounts/ Regional Input-Output Tables
The Way Forward

- Intensification of work with Governorates Administrations to ensure ongoing support
- Designing Capacity Building Programs targeting employees at ETA offices as well as tourism departments inside Governorates Administrations
- Studying the feasibility of using Mobile Positioning Data for capturing, in Particular, Domestic visitors Movement across Egypt
- Working on sharing Electronic Card Transactions data with Visa Inc. which is willing to provide us with the following:
  - Growth in visitors and tourism spending
  - Spending categories
  - Top visited merchants
  - Spend split by Goods, Services and Travel
  - Spend split of Source regions and categories

As recently, the Central Agency for Public Mobilization and Statistics (CAPMAS) has launched the Fourth Economic Census this could be used to build regional Input-Output tables and where number of TSA unit’s experts are involved in this process.
Thank You

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Arab Republic of Egypt
Ministry of tourism
Tourism Satellite Account Unit
TSA