

Egyptian Tourism Statistics and The Development of Tourism Satellite Accounts

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Executive Summary

This report describes the results of a mission to Egypt organized by the USAID DATA project in March and April 2005. The purpose of this consultancy has been to assess the current status of Egyptian tourism statistics, how they hold up to international norms, and the feasibility of developing tourism satellite accounts.

The international framework for tourism statistics has been developed through the efforts of the World Tourism Organization. It is organized around the Tourism Satellite Accounts (TSA), an extension of the national accounts to track the role of cross-industry tourism activities in the economy. The framework provides definition of key concepts, defining who is considered a tourist and which products are considered “tourism characteristic,” and identifying the sectors in the International Standard Industrial Classification (ISIC) that are responsible for producing tourism characteristic products. Ten data tables form the core of the TSA; these are included in Annex B to this report.

While Egypt’s tourism statistics do not meet the international norms, they are not negligible. The major sources include:

- Household income and expenditure survey. Carried out every five years, it asks limited questions about expenditure on domestic and outbound tourism.
- Inbound tourism expenditure survey. Carried out every two years, it asked reasonably detailed questions through 2002; in 2004 it was greatly simplified and is less useful than previously.
- Five-year economic census and annual survey of establishments. The census provides information about total value of output, employment, and costs of inputs for all establishments. Annual surveys provide the same data for a sample of establishments with ten employees or more. These data sources provide base data for estimating the share of tourism in sectors that are only partially tourism-related.
- CAPMAS census of hotels. Carried out every year, this source provides data about capacity, services offered, revenues, employees, input costs, and so on.
- Annual household labor survey. This can be used to provide employment data for tourism characteristic activities, if employer surveys are not adequate.
- Arrival and departure cards. Completed by people arriving and departing from Egypt’s ports, the data in these cards are used to determine the number and origin of visitors and number of nights they stay in Egypt.
- Central Bank foreign exchange records. These track foreign currency bought by Egyptians and sold by foreigners. The Central Bank also estimates expenditure per visitor-night by foreign visitors, based on the data in the inbound tourism survey.
- Other minor sources provide information on tourism supplier licensing forms, visits to museums and antiquities, and so on.

Recommendations

The review of the Egyptian system of tourism statistics suggested a wide range of activities that could be undertaken to strengthen primary data collection. Several of these rise to the level of highest priority, and should be undertaken in an initial phase lasting about two years. Others might be deferred to subsequent phases of a statistical strengthening effort.

First phase:

- Complete a pilot Tourism Satellite Account using available data; produce results by end of 2006. The TSA should be viewed as an ongoing activity, not one to be conducted a single time once certain specific data are available. This is the argument for beginning to compile it immediately, based on available data. Through compiling the available data, it will also

be possible to estimate tourism value added, which can be used to revise and strengthen the DATA project tourism indicators.

- Revise the inbound tourism survey to include full detail on expenditures on tourism characteristic products and to permit analysis of role of environment and natural resources in tourism demand.
- Analyze data on domestic tourism expenditures from the HIES to assess whether additional data collection is warranted. If it is, work with Ministry of Tourism and CAPMAS to develop a domestic tourism questionnaire and plan for its use.
- Modify the arrival and departure cards and inbound tourism survey to identify non-resident Egyptians and collect data about their expenditures. This will not only provide better information about tourism, but will correct an error in the balance of payments accounts, which treat non-resident Egyptians as if they were resident for accounting purposes.
- Work with the Ministry of Tourism to determine information needs to implement the Sustainable Tourism Strategy that is now being developed.

Subsequent phases:

In later phases of the work, several other tasks will be essential.

- Institutionalize the compilation of TSAs, determining a schedule for updating them based on when the key underlying surveys are carried out.
- Carry out the survey of domestic tourism expenditures if this has been found necessary.
- Carry out additional data collection needed to implement and monitor the Sustainable Tourism Strategy; this will involve working with Ministry of Tourism, EEAA, CAPMAS, trade associations, and other agencies and organizations.
- Identify other priorities for strengthening the system of tourism statistics, choosing among the many possible areas for augmenting the current primary data collection.

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Acronyms

| | |
|--------|---|
| BOP | balance of payments |
| CAPMAS | Central Agency for Public Mobilization and Statistics |
| CPC | Central Product Classification |
| HIES | Household Income and Expenditure Survey |
| HLF | Household Labor Force Survey |
| IMF | International Monetary Fund |
| ISIC | International Standard Industrial Classification |
| PWG | TSA Policy Working Group |
| SDDS | Standard Data Dissemination System |
| SNA | System of National Accounts |
| STS | System of Tourism Statistics |
| TBOP | tourism balance of payments accounting |
| TCA | tourism characteristic activity |
| TCP | tourism characteristic product |
| TSA | Tourism Satellite Accounts |
| TWG | TSA Technical Working Group |
| WTO | World Trade Organization |

1. INTRODUCTION

This report describes the results of a mission to Egypt organized by the USAID DATA project in March and April 2005. The mission has focused on several tasks:

- Conducting a diagnosis of the Egyptian system of tourism statistics, assessing how it compiles with international standards in this area.
- Reviewing the feasibility and proposed process for compiling a set of tourism satellite accounts (TSA) for Egypt.
- Reviewing primary data sources directly pertaining to tourism or essential to understand the role of tourism in the economy, to assess their adequacy to meet policy needs and to construct TSAs.
- Reviewing the data being used to calculate the tourism portion of quarterly GDP and consider whether this could be strengthened with improved tourism statistics.

Several major findings have emerged from this mission. While Egypt's tourism statistics are not as complete as desired, and are not structured according to international norms, they do provide a basis for understanding the role of tourism in the economy and building a TSA. There is some interest in improving tourism statistics. There is also substantial understanding of the importance of tourism to the economy and to the country's balance of payments position. These factors suggest that institutionally it may be possible to strengthen the system of tourism statistics in the future.

As in all statistical work in Egypt, one of the major constraints to improving the situation will be the reluctance of government agencies, particularly CAPMAS, to share data with other government agencies and the public. Because this problem is familiar to all who work on Egyptian statistics, this report does not dwell on this point. Suffice it to say that additional investment in primary data collection is not justified if the detailed data are not readily accessible to those who can use them for policy analysis, strategic planning, or managing the country's tourism industry.

If the existing statistics are made available (preferably publicly), additional investment in data development will be valuable in a number of areas. Existing data should be organized using the TSA framework, and published along with full documentation of data sources, strengths, and weaknesses. This will provide a clear picture of what is known about Egypt's tourism industry and what is not.

At the same time, work should begin immediately to revise the inbound tourism expenditure survey so that it provides more detailed information and is compatible with international norms. This survey is one of the key sources of information about the role of tourism in the economy, and should be made as useful as possible.

A quick analysis should be carried out to determine the importance of domestic relative to inbound tourism, both in numbers and in expenditures. If it proves significant, which is likely at least in numbers and probably in expenditures, a survey mechanism should be developed to obtain additional information about this activity.

Additional efforts should also be undertaken in several other areas, including correcting an error in the balance of payments and tourism statistics by treating non-resident Egyptians who return to Egypt to visit as inbound tourists and investigating data needs for the sustainable tourism strategy being developed by the Ministry of Tourism.

Chapter 2 of this report provides a quick introduction to key elements of the international framework for tourism statistics. This is kept brief, and includes references to information sources available on the web, for those who wish to learn more about tourism satellite accounts and standards for tourism statistics.

Chapter 3 reviews the major primary sources of data specifically pertaining to tourism in Egypt or used to understand the role of tourism in the economy. This chapter is a summary of a much more detailed discussion in Annex A of the report. That annex reviews the questionnaires used to collect the data line by line, flagging each item that has or could be used to complete the TSA or analyze the role of tourism in the economy. This discussion is cross-referenced to the TSA tables, which are presented in Annex B. In the tables, the sources of potentially useful data are indicated in each cell for which any information is available, so that we can trace exactly the components of the TSA for which some data are available and where those data are collected. It should be noted, however, that this review included the questionnaires that could be obtained and translated in the course of this mission. Additional work of this type will be needed to assess the utility of primary data sources about which detailed information was not available. Fortunately, such information was available for the most significant sources.

Chapter 4 analyzes the utility of the Egyptian data and makes recommendations for strengthening the system of tourism statistics. It begins by considering the major demand for tourism statistics in Egypt. Discussion of the compilation of TSAs has been driven more by the desire to be compatible with international norms than by a clear assessment of the demand side of tourism statistics. While compiling the data that are available into the TSA framework is unquestionably a good idea, the investment of significant resources in additional primary data collection should be driven by policy and management needs for information rather than by a desire to fill in the TSA tables.

The chapter then reviews the major recommendations on the table for improving tourism statistics, considering how each would contribute to understanding of the role of tourism in the economy, to strengthening other statistical information, and to managing the tourism industry. Based on that review, it suggests priorities among the possible new data collection efforts.

The last section of the chapter sets out a series of specific actions that could be undertaken in an initial effort to improve Egypt's system of tourism statistics. These recommendations have a rough two-year framework in mind, through the end of 2007, and they focus primarily on actions within the scope of the DATA project.

Four annexes complement this analysis. As already mentioned, Annex A provides detailed information about primary data sources and annex B includes the ten basic tables of the tourism satellite accounts. Annex C is a partial description of published data on Egyptian tourism. Annex D provides a list of major reference works on tourism satellite accounts. Many of these can be downloaded at no cost from the internet; others are sold by the World Tourism Organization.

2. The International Framework for Tourism Statistics

To assess the Egyptian system of tourism statistics (STS), it is important to have a basic understanding of the international framework with which it is being compared. This means developing a basic familiarity with the tables that the World Trade Organization (WTO) recommends that countries complete. It also means understanding some of the fundamental definitions and concepts on which tourism statistics are based. While those definitions and concepts may initially seem obvious, they have in fact been the subject of considerable debate among the countries working through the WTO to develop standards for tourism statistics, because many options were possible for how terms should be used or tourism activity measured.¹

2.1 Definition of tourism

Through the WTO, the following definition of tourism has been agreed upon:

...the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited. (WTO 2000)

A few points are worth noting about this definition. First, in common English parlance, “tourism” refers only to leisure activities. The WTO definition uses the word to mean all travel, for a number of possible purposes of which leisure is only one. Second, travel specifically for work paid in the place visited – labor migration, that is – is not considered to be tourism. Business trips when one is paid from the home country are included in this definition, however. Third, travel for the purpose of study is included; thus foreign students should be counted as tourists as long as they return to their home country at least once a year. Travel for medical, religious, and other purposes is also included. Fourth, travel for work in another country and travel for more than a year are not considered tourism for WTO purposes. This is consistent with the definition of residence in the national income and balance of payments accounts. A person is considered resident in a country if she or he engages in economic activity in that place and lives there for more than a year, even if she or he is a citizen of a different country.

2.2 Demand Side: Types of Tourism Consumption

To be useful for policy purposes, the STS must distinguish between travel of Egyptians abroad, travel of foreigners to Egypt, and travel of Egyptians within their own country. To do this requires a further distinction which is basic to the System of National Accounts (SNA). This is between resident and non-resident enterprises, a concept analogous to residence of individuals. The economic activity of a country is counted in the national accounts of the country in which it is located. In general, an enterprise is resident in the country where it is located. There are gray areas regarding residence, however, when a company from one country does business in another. For example, in the purchase of airline tickets or packaged tours, questions may arise in determining which country's accounts the expenditures will be recorded. In addition, travelers often spend money related to their journeys in their home countries before leaving; these will accrue to the accounts of the home countries, not those visited. In tracking the economic impact of tourism, it is important to know which expenses are made where, and to whose national accounts they accrue.

With this in mind, the STS distinguishes among the following categories of tourism:

- *Domestic* tourism is the tourism of resident travelers within the economic territory of the country of reference, i.e. the country in whose tourism we are interested. In Egypt,

¹ For a detailed review of those debates, see Liberos undated.

therefore, domestic tourist consumption therefore includes the expenditures of Egyptians when traveling in their own country.

- *Inbound* tourism is the tourism of foreigners – formally termed “non-resident visitors” - within the economic territory of the country of reference. Inbound tourism consumption includes the expenditures by foreigners while they are in Egypt, i.e. purchases made from enterprises resident in Egypt. If inbound tourists purchase plane tickets or trips from their home country and fly on a foreign airline, inbound tourism consumption may be considerably less than the total amount they spend on their trip, since those purchases will not have been made from enterprises resident in Egypt. Because Egyptians living and working abroad are, for national accounts purposes, resident in the countries where they work, their expenditures when returning to Egypt on holiday should be treated as part of inbound tourism.
- *Outbound* tourism is the tourism of people from the country of reference to other countries; outbound tourism consumption includes their expenditures outside of Egypt. It does not include purchases associated with the trip that are made before they leave Egypt or after they return; those are part of internal tourism.
- *Internal* tourism is the tourism of visitors, both resident and non resident, within the economic territory of the country of reference. Thus internal tourism consumption includes the expenditures within Egypt of both domestic tourists and inbound tourists, and is the most extensive measure of tourism consumption within Egypt. The items purchased by tourists may include both domestically produced goods and imported ones. This distinction is important, because if imports constitute a significant portion of internal tourism consumption, it will contribute less to the Egyptian economy than if tourists largely consume domestically produced goods and services.
- *National* tourism is the tourism of Egyptians within and outside their home country. Similarly, national tourism consumption refers to all purchases by Egyptian travelers, irrespective of where they are made, and is the sum of domestic tourism consumption and outbound tourism consumption.

The classification of purchases made through travel agents has been a matter of much discussion in the development of the TSAs. This is particularly important in the case of outbound tourism when the traveler purchases plane tickets or hotel rooms through a resident travel agent, but the airline or hotel is non-resident. The consensus was that the traveler should be considered to be making two purchases; the ticket or hotel room, and the service of the travel agent in procuring them. The travel agent’s commission (whether it is borne by the traveler or by the airline or hotel) is the service charge, and the remaining cost is the price of the item itself. The commission is considered part of internal tourism, while the item itself is part of outbound tourism. Because the travel agent is resident, the commission is not an import, but if the supplier of the item itself is non-resident, then the plane ticket or hotel room is an import. If the airline is resident, however – if an Egyptian buys an Egypt Air ticket to Milan, for example – then that portion of outbound tourism consumption also is not an import.

2.3 Supply side: Products and Producers

So far we have talked about tourism from the demand side, organizing categories of tourists and their consumption. To build a TSA we must also consider the supply side; what is offered in the Egyptian economy to tourists. This is where much of the problem lies in building statistical systems about tourism, and is the reason why satellite accounts are needed. “Tourism” cannot be clearly defined as an industry in the way that, say, food products or construction can be. Much of what tourists consume is also consumed by those who are not tourists; food, beverages, restaurant meals,

tobacco products, gifts, local transportation, and so on. The “tourism industry” is defined only by the fact that it includes items consumed by tourists, i.e. by its demand side.

In response to this problem, tourism analysts have categorized the items consumed by tourists, and used that as a way to define the industry. The WTO definitions are as follows:

Tourism characteristic products: those products, which, in most countries, it is considered, would cease to exist in meaningful quantity or those for which the level of consumption would be significantly reduced in the absence of visitors, and for which statistical information seems possible to obtain;

Tourism connected products: a residual category including those products that have been identified as tourism specific in a given country, but for which this attribute has not been acknowledged on a world wide basis;

Tourism specific products: the sum of the two previous categories. (WTO 2000)

The TSA tables include both characteristic and connected products. For some characteristic products, such as lodging, the full output may indeed be consumed by tourists. For others, however, such as restaurant meals, local transport, entertainment, and so on, only some of the output is actually consumed by tourists. The definition of connected products is country-specific; this category includes items that might meet the definition of characteristic in some countries but not in others, so they should not be universally considered to be particular to the purchasing patterns of tourists.

The UN Statistics Division (UNSD) and the WTO have been working for several years on proposals to revise the International Standard Industrial Classification (ISIC) to better include tourism activities. This has led to development of the System of Industrial Classifications for Tourism Activities (SICTA), a provisional revision of the ISIC. Additional work on tourism classifications is under discussion in preparing Revision 4 of the ISIC. The table below shows activities considered to be part of tourism, how they are classified in the most recent ISIC version (Revision 3), and how they have been classified in the SICTA. The TSA tables use numbers 1 through 12 to identify the key tourism characteristic activities.

| Activities description | ISIC, Rev.3 | SICTA |
|--|--|--|
| 1. Hotels and similar | 5510 | 5510 |
| 2. Second home ownership (imputed) | Part of 7010 | Part of 7010 |
| 3. Restaurants and similar | 5520 | 5520 |
| 4. Railway passenger transport services | Part of 6010 | 6010-1, 6010-2 |
| 5. Road passenger transport services | Part of (6021 and 6022) | 6021-1, 6021-2, 6021-3 6022-1, 6022-2, 6022-3 6022-4 |
| 6. Water passenger transport services | Part of (6110 and 6120) | 6110-1, 6110-2 Part of 6110 6120-1, 6120-2, 6120-3 Part of 6120 |
| 7. Air passenger transport services | Part of (6210 and 6220) | 6210-1 6220-1, 6220-2 |
| 8. Transport supporting services | Part of 6303 | 6303-1, 6303-2, 6303-3 |
| 9. Transport equipment rental | Part of (7111, 7112 and 7113) | 7111-1, 7111-2, 7111-3 Part of 7112, 7113-1 |
| 10. Travel agencies and similar | 6304 | 6304 |
| 11. Cultural Services | 9232 9233 | 9232-1, 9232-2 9233-1, 9233-2 |
| 12. Sporting and other recreational services | Part of 9214 Part of 9241 Part of 9219 Part of 9249 | Part of 9214 Part of 9241 9219-1 Part of 9249 |
| Source: WTO 2000 | | |

2.4 Tourism Value Added, Tourism GDP, and Value Added from Tourism Industries

One of the major objectives of the analysis of tourism and the compilation of TSAs is to develop a single number that summarizes the overall impact of tourism on the economy. The choice of indicator and how it should be calculated has been the matter of considerable debate over the past ten years, as there is no single measure that is clearly appropriate.² The conventional measure would be tourism value added (TVA), sometimes called tourism GDP, which would show the value of products provided directly to tourists less the cost of inputs used to produce them. An alternate measure, value added from tourism industries (VATI), measures the total value of the output of tourism-characteristic and connected activities less the total input costs of those industries.³

Measuring TVA is difficult, because it depends on knowing not only how much tourists consume of characteristic products that are entirely tourism-dependent, such as lodging, but also how much they consume of characteristic products that are also consumed by non-tourists, such as restaurants and entertainment, and how much they consume of connected products. If those shares are known for each industry supplying the products in question, they are applied to the input costs of those industries to determine the value added in producing for tourists, which will be a share of the total value added for the industry in question. This is then summed to calculate TVA, which is then an indicator of the share of direct tourism consumption in GDP. The same shares will be used to estimate the quantity of employment directly generated by tourism.

VATI is a simpler measure to calculate, but may be less useful for policy purposes. It is a measure of the value added in the industries producing characteristic products, irrespective of the share of those products actually consumed by tourists. It is of interest to those focused on the supply side of tourism activity, whereas TVA captures the contribution of tourism to the economy.

TVA is a measure of the direct impacts of tourism, but does not include indirect or induced impacts. That is, it measures the value added due to consumption by tourists, but does not measure the value added from consumption of input goods by tourism characteristic activities – indirect impacts – nor does it measure the consumption of employees in tourism characteristic activities – induced impacts. Thus, for example, the TVA will include the value added by the hotel industry, but it will not include the value added in the food processing industry that provides food and beverages to the hotels or the value added associated with the consumption of hotel employees. In the case of goods purchased by tourists (rather than services like lodging and transportation), TVA includes the value added generated through their distribution but not through their production.

For purchases made through travel agents, the value of the item itself – plane ticket, hotel room, etc – is considered to be the product of the airline or the hotel industry, rather than considering them to not the travel agency. The agency's product is its service in making the items available, and its input costs are office space, telephones, and so on. The agency's product does not include the tickets or hotel rooms themselves, so their input costs do not include the price of flights or lodging. The airline provides transportation, with input costs being the planes, pilots, and so on. Similarly the hotel provides lodging, with input costs of buildings, staff, and so on. Thus TVA will include the value added by travel agents as their commissions less operating costs, and value added by airlines as ticket prices less the costs of planes, pilots and other operating costs – which may include the commissions they pay to travel agents.

Grey areas arise in determining which consumption should be allocated to tourism, particularly for connected products. For inbound tourists, all expenditure is allocated to tourism, even of everyday

² See Liberos pp 15-23 for a summary of the debate.

³ "Value added" equals final output – from the economy as a whole or a single sector – less intermediate consumption. Intermediate consumption includes material inputs, but it does not include labor costs; thus earnings by labor are part of value added.

items like clothes or toiletries, simply because if they had not traveled those purchases would not have occurred in the country of reference. For domestic tourists, however, the line is less clear. If a tourist goes to the beach, and while there she purchases some new clothing at a shop in the tourist area, but she wears the items regularly when she returns home, should this be considered a part of tourist expenditure? From a national perspective, probably not – but from the regional or local perspective of the tourist town, it is an exogenous increase in demand.

2.5 Tourism Satellite Accounts

The international framework for tourism statistics is largely provided by the Tourism Satellite Accounts. This framework is linked to the SNA, which provides an overall framework for organizing economic data. The SNA is used worldwide and permits international compatibility among statistical systems. The structure of the TSA has been developed through an extensive process coordinated by the World Travel Organization (WTO), with participation of Eurostat, the Organization for Economic Cooperation and Development (OECD), the United Nations Statistics Department, and a number of national statistical offices. The result is a set of methodological documents which have been approved by the UN Statistical Commission for use worldwide.⁴

The TSA is an expansion of the framework of the SNA to organize information about tourism supply and demand. Satellite accounts were introduced in the 1993 revision of the SNA as a way to permit a way to organize information that will be insofar as possible consistent with the national accounts, when such information cannot be directly included within the accounts themselves. In comparison with other satellite accounts, notably the environmental accounts, the TSAs go very little beyond the SNA itself, not modifying its core definitions or introducing data not calibrated in monetary values.⁵ The TSA is made up of a series of ten tables.⁶

Table 1 covers inbound tourism expenditures, as defined above. The columns in this table, as throughout the TSA, distinguish between visitors traveling for a single day and those spending at least one night on the road. The rows identify specific products on which tourists might spend money; see discussion below on tourism specific and tourism characteristic products.

Table 2 presents information on domestic tourist expenditures, and is structured in the same way as Table 1.

Table 3 includes outbound tourist expenditures, both those in Egypt and outside of the country, and is structured in the same way as Tables 1 and 2.

Table 4 is the sum of Tables 1 to 3.

Table 5 is a TSA version of the SNA production account. In the upper portion it shows the output of tourism products by conventional industry sectors in the economy. The row headers are the same products as in Tables 1 to 4. The column headers include twelve ISIC codes (at different levels of detail) considered to constitute the tourism industries; these include hotels, second home ownership, restaurants, railways, road transport, water transport, air transport, passenger transport and supporting services, passenger transport equipment rental, travel agencies, cultural services, and sporting and other recreational services. The lower portion of the table shows inputs to each of the TSA sectors of products, with the product information classified according to the standard system of

⁴ These documents, listed in Appendix D, are sold on the web through the WTO, at <http://www.world-tourism.org/cgi-bin/infoshop.storefront/EN>.

⁵ For more information about environmental accounts, see Hecht 2005.

⁶ The structure of all of the tables are in Annex B, which includes references showing which cells of the tables might be completed based on data currently available in Egypt. A full discussion of the tables may be found on the web at www.world-tourism.org/statistics/tsa_product/TSA_in_depth/KeyWords/X5.htm.

the SNA (the Central Product Classification, or CPC) rather than according to the TSA categories for tourism-characteristic products.

Table 6 builds on Table 5. In addition to showing domestic supply of characteristic products by characteristic activities, it shows supply of characteristic and connected products by rest of the economy, the imports of each product, and taxes less subsidies on those products. These are the basis for calculating total supply to the economy of characteristic and connected products. This is used to calculate “tourism ratios,” or the share of supply of each product (including connected products) in the supply of that product in the economy as a whole. These data are input into the TSA version of the input-output accounts.

Table 7 shows employment in tourism characteristic activities. The column headers are the number of jobs and gender of workers; the rows headers track the twelve industry sectors. In principle, tourism accounts should identify all employment generated by tourism, including that generated by tourism activities’ intermediate consumption. However The WTO does not recommend including indirect employment at present, because it is considered unrealistic given the state of tourism data and national accounts in most countries.

Table 8 shows investment (gross fixed capital formation) in tourism characteristic activities, government, and other related industries. The column headers list the tourism characteristic activities; the row headers list the types of investment (from the SNA asset classification) that might be made by the tourism industry.

Table 9 covers tourism consumption by government. It provides information by level of government (column headers) and by function (row headers). The functions include tourism promotion, general tourism planning and coordination, statistical work on tourism, administration of information bureaus, control and regulation of establishments in contact with visitors, and so on.

Table 10 includes an array of non-monetary indicators of tourism, such as number of visitors, mode of transport, number and capacity of lodgings, and number of establishments in characteristic and connected activities.

2.6 Tourism Balance of Payment Accounts

The expansion of the balance of payments (BOP) accounting system to explicitly address tourism may make sense for countries whose economies depend heavily on inbound tourism. Tourism BOP accounts (TBOP) would disaggregate many of the items in the conventional BOP accounts to distinguish those components due to tourism from others. The methodology for constructing a TBOP has not yet been agreed on through the WTO. In the future, however, it may be of interest to Egypt, given the important role of inbound tourism in the economy.

3. Egyptian Tourism Data

Egypt has enough data on tourism to begin compiling tourism satellite accounts, but the results will not be reliable without significant investment in additional data collection. Annex A to this report describes in detail all of the primary data sources for which survey forms could be obtained during the course of this consultancy, considering exactly how the information in each question might be used to complete the TSA tables. This chapter provides a brief overview of that information.

Egypt regularly carries out two surveys that specifically seek information on tourism, a biannual sample survey of foreign visitors to Egypt and an annual census of hotels:⁷

3.1 Inbound Tourism Expenditure Survey

CAPMAS has conducted a survey of inbound tourism every two years since at least 1992. Until 2002, the survey was fairly detailed, asking about expenditures on a number of different services, where people traveled within Egypt, what kinds of activities they engaged in during their visit, and so on. The categories of expenditures were not the same as the WTO classification of tourism characteristic activities, but there is a fair degree of overlap. These data provide a reasonable basis for beginning work on TSA Table 1.

Unfortunately, in 2004 the inbound tourism questionnaire was greatly simplified, asking only for the total amount spent, and the amount on airfare. For those on package tours, it asks the price of the tour and the amount spent on other items. The 2004 data are therefore inadequate to complete TSA Table 1.

3.2 Household Income and Expenditure and Survey (HIES)

In many countries, data on domestic tourism are collected from household consumption surveys. The Egyptian HIES is conducted every five years. The 1999-2000 version, the most recent which is completed, includes some questions on tourism expenditures, but does not ask for enough detail to complete TSA Tables 2 and 3, covering domestic and outbound tourism expenditures. The bulk of the questionnaire is a many-page list of goods and services, in which the respondent indicates how much of each item was purchased by the household and how much was spent on it. A few of the items are related to tourism:

P. 46 Code 2702 Expenditures on air and sea transportation within Egypt.

P. 49 Code 3109 Cost of school trips.

P. 49 Code 3110 Cost of weekend trips.

P. 49 Codes 3111 to 3113. Expenditure for "travel within Egypt during summer or winter." According to the translator, this refers to regular annual trips to visit family in other parts of the country.

P. 50 Codes 3206 and 3207. Lodging and other expenses for travel except for those during regular summer and winter travel.

P. 53 Code 3530. Expenses for religious tourism outside of the country.

P. 53 Code 3531. Expenditures for leisure tourism outside of the country.

P. 53 Code 3532. Other expenditures outside of the country.

There is no detail on these items beyond what is described here, so it is not possible to allocate domestic tourism expenditures to the tourism characteristic products defined by the WTO. There

⁷ A sample survey collects information from a subset of the targeted population and the results are extrapolated to the whole. A census collects information from every individual (or establishment, household, etc.) in the targeted group.

may also be overlap among the values in these questions, particularly between codes 3206-7 and 3109-10. Despite these problems, these data can still provide a rough estimate of total expenditures on domestic and outbound tourism. Such an estimate may be helpful in determining where further investment on data collection will be useful, notably between inbound tourism and tourism by Egyptian, even if it is not adequate for much else.

The 2004-5 HIES, which is still being carried out, collects less detailed information on tourism expenditures. For travel within Egypt, it asks for total figures for school trips, weekend trips, and travel in summer or winter. For international travel, it asks about pilgrimages and all other travel. All of the other questions on tourism expenditures have been omitted.

3.3 Annual Hotel Census

CAPMAS conducts an annual census of places of accommodation. It begins by identifying the hotel, its location, owners, quality rating, capacity, facilities other than bedrooms, number of visitors and their origin, and number of visitor-nights. It then asks for information about hotel employees, including gender, nationality, educational level, type of employee, wages and other benefits paid. It asks for some detail on other input costs incurred by the hotel, including food products, spare parts, office equipment, water, electricity, fuel, and other commodities; rents, repairs to building, vehicles, furniture, tools and equipment; publishing and advertising; and so on. There is enough detail here to allocate the input costs to ISIC codes, which could provide information for a refinement of the Egyptian input-output tables.

The questionnaire then asks about hotel revenues by service, including lodging, coffee shops, rental of meeting rooms, and so on. All of the lodging revenue can be allocated to tourism. However since some consumers of hotel services such as restaurants and health clubs are not tourists, it may not be clear how much of the other revenue should actually be allocated to tourism. The specific services provided by hotels that are listed in the questionnaire are not the same as the twelve tourism characteristic products in the TSA. It may be useful, in future versions of the form, to change these categories so they are compatible with WTO norms.

The questionnaire asks about the value and change in value of hotel assets, including land, buildings, machines and equipment, vehicles and boats, tools, furniture and office equipment, and others. This questionnaire does not disaggregate assets in the same way as the TSA, so it is not possible to complete the detailed data in TSA Table 8 on gross fixed capital formation. It may be useful to modify this part of the questionnaire so as to differentiating types of buildings and changes in their value. This will also make it more feasible to differentiate among the different services offered by hotels, and perhaps eventually to distinguish revenues from tourists from non-tourism revenues.

In addition to these two tourism-specific data sources, several sources of broader economic data provide essential information for studying the role of tourism in the Egyptian economy. These include the economic census, conducted every five years; the annual establishment surveys used to update the economic data in intercensal years; and the household labor survey.

3.4 Economic Census and Annual Surveys

These CAPMAS questionnaires provide information about Egyptian enterprises, including their activity, employment, wages, input goods, and revenues from different outputs. The economic census is conducted every five years, and the annual surveys are conducted in the intercensal years. The activity information is used by CAPMAS to assign ISIC codes to the enterprises. If ISIC codes are assigned at the four-digit level, then the data can be used, along with data from other sources, to

estimate tourism intermediate consumption, value added, investment, employment, and so on, in order to complete TSA tables 5, 6, 7, and 8.

The way this is done is fairly straightforward, if the data are available. The share of a sector X's output consumed by tourists (call it S_x) is calculated as:

$$S_x = \frac{\text{output of sector X consumed by tourists (from the inbound tourism survey and the HIES)}}{\text{total output of sector X (from the economic census or survey)}}$$

This ratio is then applied to other values for sector X – employment, wages, intermediate consumption, investment, and value added, all of which should be available from the economic census – to estimate the share of each of those measures that should be allocated to tourism. That is:

Sector X tourism employment = S_x * total employment in sector X

Sector X tourism intermediate consumption = S_x * total intermediate consumption in sector X

Sector X tourism investment = S_x * total investment in sector X

and

$$\begin{aligned} \text{Sector X tourism value added} = & \\ & S_x * \text{total value added in sector X} = \\ & \text{Output of sector X consumed by tourists} \text{ less } \text{sector X tourism intermediate consumption} \end{aligned}$$

For some purposes, all of these values should be adjusted to take into account the share of each tourism characteristic product that is imported rather than produced in Egypt. Tourists' consumption of imports does not build the local economy in the same way that consumption of domestic products; this must be taken into account in use of the data.

3.5 Household Labor Force Survey

The CAPMAS labor force survey is conducted quarterly, surveying 21,000 households per quarter. The survey is organized in three tables. Table 1 covers demographic features of the family members, asking for each his or her name, relation to the household head, gender, age, education, and marital status, and then whether the person is working, looking for employment, or not in the labor force because of their age, they cannot work, they are a student, or other reasons. For those who are employed, Table 2 asks their employment status; salaried, the owner of an enterprise employing others, self-employed, or an unpaid household worker. For those working outside of the home, they are asked their (or their establishment's) main activity and sector (government, private, public enterprise, investment company, foreign company, other). They are then asked about their employment background and occupation, and how much they are paid. Table 3 collects information about unemployed people.

The main question of reference to the TSA is in Table 2, the main activity in which each person's employer is engaged. This table is completed with the assistance of an interviewer, who fills in this cell on the table with a description of the sector in which the person works, which a CAPMAS staff member uses to assign the individual to an ISIC code. Based on those assignments, the labor force survey data might be used to obtain information for TSA Table 7, on employment. Employment classifications provided by employers are generally considered more reliable than those provided by workers, so the economic census or survey may be a better source of this information. On the other hand, the labor force survey is conducted more frequently than the economic census and surveys, which may make it a better source of employment information for the TSA.

In addition to statistical surveys, administrative data are a very important source of information on Egyptian tourism. These come from a number of agencies, including the Ministry of Interior, the Central Bank, the Ministry of Tourism, the Ministry of Antiquities, and so on.

3.6 Arrival and Departure Cards

On arrival or departure in Egypt, all travelers complete cards providing basic information about their identity and travels. These cards are collected by the police and the data managed by the Passports, Nationality, and Immigration Administration of the Ministry of Interior. For non-Egyptians, these cards ask name, date of arrival flight number or mode of arrival, nationality, passport number, purpose of visit, address in the country, and dependents traveling with the person filling out the card. At immigration the data are entered in a Ministry database organized by passport number; follow-up data are entered in the same database from the departure card. The Ministry thus tracks the stays in Egypt of each individual visitor to the country.

This database provides the basis for widely available and respected data on the number of foreign visitors, their origin, and their length of stay in Egypt. These data are published by CAPMAS, the Ministry of Tourism, the Central Bank, and other ministries. They are the basis for extrapolating the expenditure data from the survey of inbound tourists to the entire foreign tourist population and for estimating expenditures per visitor-night by foreign tourists. Unfortunately they do not include information about Egyptians living abroad who return to the country to visit. From the perspective of the TSA and of the economic impact of tourism, this is a significant gap, since they could constitute an important share of visitors to the country and foreign exchange expenditures in country.

3.7 Central Bank Data on Currency Exchanges and Tourist Expenditures

The Central Bank calculates and publishes data on the average expenditures on inbound tourism, foreign exchange (FX) transactions related to travel, and payments of foreign exchange for outbound travel. Their data on FX purchases for travel abroad and FX sales by inbound tourists are obtained from the banks within Egypt that handle the transactions. FX sales by inbound tourists are consistently lower than inbound tourist expenditure data obtained from CAPMAS. The Central Bank has never compared the FX purchase data with the data on outbound tourism collected in the HIES; such a comparison may be interesting.

The balance of payments accounts figure for receipts from travel is based on the CAPMAS survey of inbound tourists. According to Central Bank staff, CAPMAS converts all of the data into US dollars and calculates subtotals of expenditure and visitor-nights by visitors from the major regions of the world. This relies on the visitor-night data provided by the Ministry of Interior, discussed in section A.6. CAPMAS turns these subtotals over to the Bank. Bank staff then calculate a weighted average of total expenditure per visitor-night for all foreign tourists combined, again relying on the Ministry of Interior on visitor-nights by people from different regions of the world. In the years for which the inbound survey is conducted, this figure is reported by the Central Bank as the average expenditure per visitor per night. For the non-survey years, the Central Bank adjusts the average expenditure figure to reflect changes in the \$US/LE exchange rate that it was cheaper for foreigners to come to Egypt once the LE was devalued.

Because Egyptians living abroad who return to Egypt on vacation are included neither in the CAPMAS survey nor in the Ministry of Interior data on visitor-nights, their expenditures in Egypt are not captured by any of these data. This is inconsistent both with the definition of residence in the national income and balance of payments accounts and with the WTO definition of tourism; correcting this error may be important for the improvement of tourism statistics.

3.8 Tourism Suppliers Licensing Forms

The Ministry of Tourism licenses hotels, tour operators, and guides. The information provided at the time of initial licensing or license renewal offers an additional source of primary data about the supply side of the tourism industry. For example, they include information about the languages spoken by guides, which is published by the Ministry of Tourism in its tourism data book. Unfortunately, it was not possible to obtain copies of the licensing forms; this should be done in order to complete work on tourism data.

3.9 Government Budgets

The national budget will include total figures for the expenditures on public agencies that encourage tourism, particularly inbound tourism. Although gaining access to this information is not always easy, and was not even attempted in the course of this mission, the data should be available with which to complete TSA Table 9 on public expenditures.

3.10 Entertainment, Sports, Cultural Sites, and Antiquities

CAPMAS publishes data on visits to entertainment, sports events, and cultural sites such as museums and antiquities, all of which are tourist destinations. Unfortunately it was not possible to obtain this information in the course of this mission. These data are not likely to identify who participates in these activities. However if the information in the tourism expenditure surveys is reasonably detailed, these data can form the denominator for calculating the share of such activities that are engaged in by tourists. This will provide an interesting basis for analyzing tourism patterns. It will also provide a basis for allocating public and private expenditure in these areas between tourist and other participants, which will be important for TSA tables 5 through 9.

4. Improving Egyptian Tourism Data

Discussions of Egyptian tourism data over the past few years have focused on building tourism satellite accounts. The TSA is the international standard for economic statistics on tourism, and provides an excellent framework for analyzing the role of tourism in the economy. The ability to link tourism data to the SNA gives any data collected a much greater value than they would have if they were not compatible with the rest of the country's economic statistics. The National Accounts Unit of the Ministry of Plan has planned for several years to broaden their work to include TSAs, although they have not yet done so. To the extent that the collection of additional economic data on tourism is Egypt's priority, they should unquestionably be compatible with the TSA framework, and should become part of a comprehensive database using that framework. Even without new data collection, compiling the existing data into the TSA framework will help make the best use of the available data, and is an excellent idea.

However, compilation of the TSA is not the objective of improving Egypt's tourism statistics. The TSA is the means to another end; improving understanding of how tourism can strengthen the country, and ensuring that it actually does strengthen it insofar as possible. In making plans for improving the statistical system, therefore, we must consider how the data are being used now or may be used in the foreseeable future. This will provide a basis for deciding which data are adequate and which additional data should be collected. Both current and future data should be organized into the TSA framework. The key issues, however, pertain not to the timeline for TSA compilation (though this is an important step on the way), but to the identification of information needs, the choice of additional data to collect, and ensuring that data are actually being used as they should be.

This section therefore looks at several issues. First, it identifies insofar as possible some of the key current or anticipated demands for tourism statistics. Next it considers the different possibilities for new or improved data collection, and discusses the arguments for and against them. It then makes a set of recommendations for next steps, in the context of which it considers the steps that have been proposed for implementation of the TSA.

4.1 The Demand Side: Current or Potential Uses of Tourism Data

Estimating the role of tourism in the economy (calculating TVA)

The broad aim of much of the tourism statistics system is to understand how tourism contributes to the Egyptian economy. This can be done based on several different measures, depending on the interests of the analysts and the data available. The work of Tohamy and Swinscoe (2000) in analyzing the economic impact of tourism in Egypt provides a good understanding of the options. They estimate several different measures, each of which is useful for some purposes, and each of which may be valuable to update on a regular basis if possible.

Direct Impact: The direct impact of tourism on the economy is the total expenditure on internal tourism, i.e. the expenditures of foreigners visiting Egypt, Egyptians traveling in their own country, and purchases by Egyptians before they go abroad. Tohamy and Swinscoe, like most who work on the economic impacts of tourism, consider only expenditures by inbound tourists. In part this is because these are the best and most accessible data. In part it is because inbound tourism entails an exogenous increase in demand and provides foreign exchange. Tohamy and Swinscoe do not compare the receipts of foreign exchange from inbound tourists with the payments for foreign exchange by outbound tourists, to assess the net impact on the balance of payments, although Central Bank data show that this has been positive in recent years.⁸

⁸ See, for example, Central Bank of Egypt 2003/2004, p. 75.

Total output by tourists is not an adequate measure of economic impact, since it cannot be placed in the context of the economy as a whole. A more meaningful measure of direct impact is tourism value added, or expenditures by tourists less intermediate consumption by suppliers of tourism characteristic products (TCPs). As discussed in sections 2.5 and 3.4, TVA is calculated by knowing the share of tourism in the consumption of total output of each TCP. The consumption of each category of TCP by inbound tourists could be calculated from the inbound tourism survey if it were sufficiently detailed – which at present it is not, although it used to be and perhaps it could be again. Total output of each TCP should be obtainable from the economic census or the annual establishment survey. The ratio between the two is then applied to that product's intermediate consumption or value added, to obtain the tourism portion of value added for that product. The value added figures for the TCPs are summed to obtain TVA.

In the future, calculating TVA in this way should involve modifying the inbound tourism survey to reintroduce the detail that was omitted in 2004. Pending such a change, it would be possible to estimate TVA by applying the shares of consumption of each product in total tourism consumption from the 2002 survey to the total consumption figures from the 2004 survey. Obviously this introduces an additional degree of inexactitude and error that would not be present with a more detailed up-to-date survey.

Tourism value added can be compared with the value added of other sectors of the economy, to get a sense of their relative importance in total GDP. This must be done with care, however. Because tourism cuts across conventional sectors, it is not meaningful to sum TVA with the value added of other sectors, because it may entail double counting. TVA can also meaningfully be expressed as a share of GDP, which is the sum of value-added across the economy. A time series of that ratio will show trends over time in the importance of tourism in the economy as a whole. Demand for this measure is discussed further below in the section on SDDS and DATA project tourism indicators.

Indirect and induced impacts: The indirect impact of tourism expenditure is the direct impact (value added) plus the impacts that result from intermediate consumption by suppliers of TCPs. That is, it includes the value added resulting from hotels' purchases of furniture and linens; from restaurants' purchases of food; from airlines' purchases of fuel; and so on. The induced impact of tourism goes one step beyond indirect impacts, to include in addition the economic impact resulting from household purchases by employees of tourism characteristic activities.

To understand the overall impact on the economy – on output, value added, employment, and household income - it is necessary to calculate indirect and induced impacts as well as direct ones. Since it is this value that shows how tourism growth will actually affect the economic well-being of Egyptians, it should be of considerable interest to policy-makers. These values are estimated using the input-output tables. Input-output analysis can be used to analyze who benefits from tourism, as well as the magnitude of the impact, by incorporating stratified data on the wages paid in the industry. If data are available, it can also be used to consider the extent to which TCPs depend on imported inputs as well.⁹

The Tohamy and Swinscoe work is based on the 38-sector I-O table calculated for 1991-2. They use the I-O framework to estimate output, employment, and wage multipliers for an increase in inbound tourism, taking into account direct, indirect, and induced effects. The resulting figures show the economy-wide impact of this particular share of final demand. Unlike TA, they cannot meaningfully be expressed as a share of total output, employment, or wages, or compared with other sectors; they represent the impact of change in one component of final demand and would have to be compared with the impact of changes in other components of final demand. Although the comparisons may be less interesting than those offered by TVA, knowing the impact throughout the economy of changes in tourism demand can be invaluable for tourism planning.

⁹ A discussion of approaches to incorporating tourism in the input-output tables is beyond the scope of this paper. For additional information, see Tohamy and Swinscoe, Liberos 2002, and UNESCAP 1990.

Unfortunately, an updated I-O table with which to continue the Tohamy and Swinscoe work is not available. There is also a 32-sector I-O table for 1996, but a more recent table is not available, so updating this work to obtain indirect and induced impacts for the present is not possible.

SDDS: DATA Project tourism indicators and the estimation of quarterly GDP

Egypt's accession to the IMF Standard Data Dissemination System (SDDS) has come with a requirement to publish quarterly updates of GDP and its components. These estimates are being made using a model developed by DATA project staff. Monthly data on number of tourists entering the country and the number of nights they stay have been combined to create a single time series indicator of the level of tourism in the country. This indicator is multiplied by an estimate of the contribution of tourism to GDP in a base year to estimate updated GDP each quarter. The contribution of tourism to GDP is estimated simply as the hotel and restaurant sectors. The total quarterly GDP is then calculated as a weighted sum of the sectoral quarterly GDP figures.

Several possible needs for improved data and indicators arise in the context of this work. First, although the documents interchangeably refer to "tourism GDP" and "GDP from hotels and restaurants," the difference between the two has implications for how quarterization should be done. The accounts now calculate GDP for hotels and restaurants, not tourism GDP. A visitor trend used to quarterize this value should be based only on number of visitor nights, not on an indicator combining visitors and visitor nights, because consumption of hotel and restaurant services will only be influenced by visitor nights. Therefore if no other changes are made in these calculations, the time series indicator should be revised to base it only on visitor nights.

Second, visitors at different seasons may spend different amounts. The winter may see a preponderance of eastern Europeans on low-budget package tours, whereas the summer may see more western families who spend much more. On the other hand, the summer also sees an influx of Gulf Arabs avoiding the heat in their countries, many of whom may own second homes in Egypt. Because many of them do not stay in hotels, their nightly expenditures may also be relatively low. The inbound tourism data are collected throughout the year. It is, therefore, important to look at these data from the past ten years to determine whether there is consistent seasonal variation in per-night expenditure. If there is, then the trend indicator used to quarterize hotel and restaurant GDP should be seasonally adjusted to reflect that variation.

Third, the per-night expenditures calculated by the Central Bank are adjusted for fluctuations in the exchange rate of the Egyptian pound, as discussed in section 3.7 above and part 7 of Annex A. The significant drop in estimated expenditure per night has led to a sense that tourist expenditures are changing radically in short periods of time, and a desire to capture that change in quarterized tourism GDP. Officials in the Ministry of Planning have expressed dissatisfaction with the DATA project's tourism indicator because it is based only on visitors and visitor nights and does not capture expenditure. However, the per-night expenditure is expressed in dollars, and as discussed elsewhere the change in that value is due to exchange rate fluctuations; per-night expenditure in LE has not changed nearly as radically. The GDP values being quarterized are in LE, not dollars, so there is no need to capture a change in expenditure per night other than the possible seasonal one discussed above.

Fourth, it would be of interest to calculate tourism GDP rather than GDP from hotels and restaurants. As discussed earlier in this report, this could be done based on the data in the inbound tourism survey and the economic census or survey of establishments. According to Tohamy and Swinscoe (p. 14), the 1996 inbound tourism expenditure survey shows that only 30 to 40% of

inbound tourist expenditure goes to hotels and restaurants¹⁰, so tourism GDP should be quite different from GDP from hotels and restaurants. Tourism GDP could be updated with each new inbound tourism survey, every two years. It could be quarterized using the composite tourism index developed by the DATA project, and the resulting value compared with the total quarterly GDP figures. This might be of interest in understanding how the role of tourism changes in the economy in real time.

However, tourism GDP could not be used for the estimation of overall quarterly GDP. Because TVA cuts across conventional sectors, including parts of a number of different four-digit ISIC codes, an actual measure of tourism GDP, rather than hotel and restaurant GDP, would duplicate data from other sectors of the calculations. Unless it all of the other sectors were redefined so as to eliminate the portion attributable to tourism, and weights established for the redefined sectors, the resulting quarterly GDP figure would be inaccurate. Clearly these broad changes in sectoral definitions are not appropriate.

Fifth, all of the discussion so far has focused on international tourism. Hotel and restaurant GDP captures the consumption of Egyptians as well as foreigners, but the DATA indicator only captures trends in foreign tourism. If quarterly GDP is being calculated based on hotel and restaurant GDP, which will have to continue because of the double counting entailed in using tourism GDP, then the trend indicator should capture travel by Egyptians as well as foreigners. At present no data are available on Egyptian tourism patterns, so this would be quite difficult. If a survey is initiated on domestic tourism, the resulting data on tourist movements should be integrated into the DATA time series indicator. Domestic tourism is likely to show different seasonal variation patterns from inbound tourism, although it may not show variations in expenditure per night.

Balance of payments accounting

The Central Bank calculates and publishes data the balance of payments data on a quarterly basis, following the procedures established by the IMF. These include measures of foreign exchange receipts and payments related to travel, calculated based on data from the banks (for payments) and from the CAPMAS inbound tourism expenditure survey (for receipts).

The major potential gap in these data arises because none of the inbound tourism statistics include the activities of non-resident Egyptians who return their native country on vacation. This is inconsistent with IMF balance of payments accounting procedures, and underestimates Egypt's foreign exchange earnings from tourism. It also underestimates the impact of tourism on the Egyptian economy.

Correcting this error would require two key changes in primary data supply. First, the arrival and departure cards completed by Egyptians traveling in and out of Egypt would have to ask their country of residence. This information would have to be entered in the Ministry of Interior database, and data about the travel patterns of non-resident Egyptians would have to be included in all reports that describe the travel patterns of foreign tourists. Since the database already exists in the Ministry of Interior, and the data are already made readily available to CAPMAS, the Ministry of Tourism, and the public, this might not be a very difficult thing to do if the Ministry of Interior and the Central Bank understood the reasons for it.

Second, the CAPMAS survey of inbound tourism expenditures would have to include those of non-resident Egyptians as well as those of foreign visitors, and questions with which to differentiate between those groups in the resulting data. This also should not be terribly difficult, as the survey is already being conducted on a regular basis.

¹⁰ It was not possible to access data from more recent inbound expenditure surveys to determine whether this pattern has continued.

At present those constructing the balance of payments accounts have not perceived this as an error, because they have not recognized Egyptians living abroad as non-residents. However, once they perceive that non-resident Egyptians should be treated as foreigners for balance of payments accounting purposes, they may be willing to encourage CAPMAS and the Ministry of Interior to make the necessary changes.

Other less important changes might also be associated with this change. The Household Income and Expenditure Survey asks some limited questions about visitors staying with the family and expenditures made on their behalf. For the TSA and the calculation of TVA, these expenditures should actually be included, as they are incurred because people are visiting the country. It might therefore be of interest to refine these questions in the HIES.

In a different area, the Central Bank may also be interested in comparing the data on outbound tourism in the HIES with the travel payments data obtained from banks in Egypt, as a way of gaining more insight into the validity of either data set. In principle, the two numbers should be close or the same. In practice, of course they probably differ significantly; many reasons might be anticipated to suggest why either could exceed the other. In the short run, such a comparison is likely to raise questions about both data sources. It may, however, suggest directions for investigation that in time lead to development of better information on the foreign exchange costs of outbound travel.

Sustainable tourism strategy

The Ministry of Tourism is preparing a request for proposals (RFP) seeking a firm to develop a sustainable tourism strategy for Egypt for the next twenty years. The strategy is to consider both the economic sustainability of projected tourism and its impacts on the environment; thus it uses the word “sustainable” in two ways. One of the tasks called for in the plan will be to design and build an information system on tourism, with which to monitor the implementation of the strategy. The Ministry of Tourism officials working on the RFP do not know yet exactly what that system should include or what issues will have to be monitored. They are, however, interested in the challenge of ensuring that any data developed through their efforts be compatible with the national accounts or other national data systems, though they do not have a clear idea of what this entails. Like other data users, they will certainly need more detailed information on inbound tourism expenditures; revision of that questionnaire for the 2006 survey will contribute greatly to this effort.

Since the RFP is not expected out until July, it is not possible to assess other data needs, but it is likely to call for use of much data beyond what is available from the major primary sources. It will call for better understanding of travel patterns and local expenditures, where people travel within the country, and what they do there. It must also take into consideration domestic tourism, which puts a drain on the capacity of tourist resources even though it does not bring in foreign exchange and does not constitute an exogenous increase in demand. The only data available on domestic tourism are in the HIES, which could be used to estimate the total expenditure on tourism by Egyptians, and the share attributable to domestic and outbound trips. There is no detail about where people go, how long they spend, or how they allocate their expenditures. The sample size may not be large enough to obtain such information from a household survey, moreover. The needs of the tourism strategy may call for development of better data on domestic as well as inbound tourism.

The environmental aspect of sustainable tourism call for an understanding of how tourism itself affects the resources on which it depends, notably environmental resources (clean beaches and sea, pristine coral reefs) and antiquities (well-maintained, easy to visit, not overcrowded). This will call for development of much non-economic data, covering such issues as environmental conditions in tourist areas, how land-based and floating hotels are managed, how dive activities are managed, and so on. Available environmental statistics are not sufficient to track the environmental impacts of

current tourism patterns or proposed new ones.¹¹ Some relatively modest modifications of the inbound tourism survey could be implemented to develop a better understanding of the extent to which tourism revenues depend on sustaining the natural environment; for details on how this could be done, see Hecht (June 2004).

Sustainable tourism can also be understood to have a wide range of social components. These include ensuring that it benefits local businesses and the poor, ensuring that indigenous culture is not distorted by the presence of many foreigners, and granting a significant role in tourism planning to the communities that will be visited. If these kinds of concerns are to be part of the Ministry of Tourism strategy, they will need to develop mechanisms to determine whether they are being achieved. To some extent these issues may be monitored through interviews or simple tracking of the planning process. It will require some thought to determine what should be tracked and how to determine whether this kind of sustainability is being achieved.

4.2 Improving Data Supply - Options and Arguments

A number of improvements have suggested for strengthening Egypt's primary data on tourism. It is important to establish priorities among these options, as not all of them can be implemented.

- Revise the inbound tourism survey to solicit more detailed information, following the classifications and recommendations of the WTO.
- In revising the inbound tourism survey, take into consideration as well the need to gather more information about the role of the environment in tourist visits and expenditures.
- Add additional questions on domestic and outbound tourism to the HIES.
- Develop a new survey on domestic tourism
- Develop a new survey on outbound tourism.
- Adjust arrival and departure cards and inbound tourism survey to include statistics about non-resident Egyptians returning on vacation.
- Obtain better data to assess the sustainability of tourism, including environmental impacts of tourist activities, expenditure data on tourism activities that depend on the environment, data to determine who benefits economically from growth of tourism, and so on. Detailed determination of which data would be needed must be worked out with the Ministry of Tourism, in the context of the sustainable tourism strategy.
- Add information to statistics about tourism entertainment, notably visits to antiquities, cultural sites, sports venues, and other entertainment.
- Obtain data from the ministry that organizes youth trips within Egypt and abroad, to determine how much the government and households spend on such trips.
- Collect additional data about the products sold by travel agents and tour operators, particularly the breakdown of prices among tourism characteristic products.
- Conduct sample survey of transportation companies to obtain information about share of trips that are for tourism.

¹¹ For details on available environmental statistics, see Hecht 2004.

- Collect additional data about the actions of non-profit organizations to encourage tourism in Egypt. These would primarily include trade associations.
- Organize data on government expenditure to promote tourism (as distinct from youth trips organized by the government). This will include the full expenditures of the Ministry of Tourism and part of the expenditures of a number of other ministries and government agencies.
- Update the I/O tables to permit a more current and more sophisticated analysis of the indirect and induced impacts of tourism.

Inbound Tourism: Improving the inbound expenditure survey is the single highest priority activity to improve understanding of Egyptian tourism. Virtually all tourism analysis depends on these data, and having additional detail is essential. Developing a new questionnaire, whose responses can be classified into WTO categories, and that can provide information on environmental dimensions of tourism, should be one of the first activities undertaken. Once these data are available, they will be used for TSA Table 1, estimation of TVA, developing an indicator showing the share of TVA in GDP, estimating daily tourism expenditures, balance of payments statistics, and virtually all other analysis of the role of tourism in the Egyptian economy.

Domestic Tourism: Whether it is important to improve statistics on domestic tourism depends on two figures that were not available when this report was being written. One is the number of domestic travelers (or domestic tourist nights). The other is their expenditures. It should be possible to estimate the number of travelers, possibly the number of trips, and total expenditures from the 2004-5 HIES statistics. It will not be possible to estimate visitor-nights, as the HIES does not request that information. Any estimates from the HIES will require access to the underlying data rather than simply the published values. This information was not published for 1999-2000; presumably it will not be available for 2004-5 either.

If both the number of travelers and the value of domestic tourism are very small relative to inbound tourism (say, 10%), then investing resources in additional data collection would have low priority. If, however, either value is as high as, say, 30%, then it is important to obtain further information both about expenditures and about travel activities. Domestic tourists presumably spend much less than inbound tourists, but they may travel in much greater numbers and have considerably more impact on the environmental sustainability of tourism in the country. If this is the case, then improved information about their activities will be essential to develop the sustainable tourism strategy.

Additional data about domestic tourism could be obtained either by modifying the HIES or by developing a new special-purpose survey. Modifying the HIES is simpler in the short run, because the survey is already established and funded, and it will be carried out regularly. However, it may not provide a sample that is large enough or sufficiently representative to obtain an accurate picture of domestic or outbound tourism. The HIES is completed by 48,000 Egyptian households. Most Egyptians may never travel at all, so the number of respondents providing data about travel expenditures may be quite small. If so, an extrapolation of those data to the whole country may be highly inaccurate. Whether this is the case depends on how many people actually complete the HIES, and of them, how many report any expenditures on travel.

Introducing a new survey on domestic tourism will be much more difficult, in terms of survey design, identifying the universe of travelers, designing a sampling methodology, and obtaining regular ongoing funding. However it may turn out to be the only accurate way to get more detailed information on the characteristics of domestic tourism. If this option is not chosen, then the HIES data, perhaps with more detail in 2009-10, should be used to provide rough estimates for TSA Table

2. While the results will be inexact, that may be acceptable if in fact they represent only a small portion of total tourism expenditures.

Outbound Tourism: At present better statistics on outbound tourism do not seem to be as important as data on inbound and domestic tourism. While they might lead to more reliable balance of payments statistics, they are not needed to estimate the economic impact of tourism, nor will they be part of tourism planning for the country. It would be of interest to see how the outbound tourism expenditure data in the HIES compare with the Central Bank's foreign exchange data, but additional investment of resources in outbound tourism data is probably of low priority. This means that as available statistics are organized into the TSA framework, TSA Table 3, on outbound tourism, will include only total figures from the HIES or FX data from the Central Bank. Table 4 will include inbound and domestic tourism consumption, but will not include the domestic expenditures of outbound tourists, as such data will not be available.

Non-resident Egyptians: Adjusting the arrival and departure information and the inbound tourism survey so as to obtain information about non-resident Egyptians returning home on vacation may be important, depending on how many of them there are. Anecdotal evidence suggests that they may represent a significant number of visits to the country. Upcoming activities should include a concerted effort to determine whether anyone knows how many Egyptians live overseas and how often they return on visits. If the number of visits is as much as 20% of inbound trips, it seems important to correct all of the statistics to capture information about them. This will take coordination among all of the government agencies involved with tourism statistics to ensure their cooperation, and to ensure that the new statistics are structured so as to maintain time series data about foreign inbound tourists.

Sustainable Tourism: If Egypt is committed to preserving its natural resource base and the tourism revenues that depend on it, more data will be needed to understand the link between the two. Some efforts to identify such data have been made (Cesar 2003, Hecht June 2004), but much additional work will be needed in the context of the sustainable tourism strategy. This will take additional exploration to determine the data available, those needed, and the priorities for developing them. Similarly, if Egypt is concerned about ensuring that its tourist helps alleviate the country's poverty problems, a broader understanding of whom the benefits accrue to will be essential. Identifying and meeting these data needs will entail collaboration between the Ministry of Tourism, CAPMAS, the Egyptian Environmental Affairs Agency, and other government agencies.

Entertainment: Strengthening data collected by those running entertainment sites, while potentially interesting for their management purposes, may be less important than other data for tourism purposes. It is useful to know how much visitors spend on such venues, but obtaining those data from an improved inbound tourism survey may be sufficient for tourism management.

Youth Trips: The data from the HIES should give some sense of the importance of youth trips in domestic tourism. The number of families providing data on youth trip expenditures relative to the number of families providing data about other domestic travel will shed some light on this question. If youth trips are significant, then it makes sense to get more information about them from the ministry responsible for organizing them. Because they are organized and subsidized by the government, such data should be available from a single source, and will not require surveys. While obtaining data from Egyptian government agencies is never easy, the difficulties involved should be institutional rather than financial.

Travel Agents and Tour Operators: Organized tours account for a significant share of travel to and within Egypt. Visitors who purchase a package tour do not know how the price breaks down between the different services it includes; hotel, meals, transportation, entry fees to museums or other cultural sites, and so on. This information could be estimated based on the breakdown of expenditures by visitors not on packaged tours, but this may be quite inaccurate. Tour operators may negotiate much lower prices than individuals, especially in large hotels that sell rooms at widely

varying prices depending on what different visitors will be willing to pay. Therefore obtaining additional detailed information from tour operators may be important in order to develop a clear understanding of tourist expenditures. The economic census will provide information about the output and intermediate costs of tour operators, but may not shed much light on the composition of the costs of their trips. It also will not relate those costs to different groups of travelers, which may be particularly interesting. Tour operators tailor their products and prices to the market in which they are selling. For example, eastern Europeans or Russians may be offered much lower rates than those offered to western Europeans, in order to Red Sea hotels rather than leaving rooms empty. Detailed information about these pricing policies may be obtained through surveys of tour operators, probably working in collaboration with their trade associations.

Transportation: Mohammad Sakr (March 2005) recommends a sample of transportation companies (or travelers) to determine the share of their revenue that is attributable to tourism. For inbound tourism, this can be estimated from the inbound tourism survey. If a domestic tourism expenditure survey is developed, it should provide the same information for trips taken by Egyptians within the country, if the sample is designed correctly. A survey specifically of transportation would probably provide better data on this subject, but is may not be of high priority relative to other data collection needs.

Non-profit Organizations: The national accounts, and by extension the TSAs, include non-profit organizations as a sector. To complete the TSA, therefore, it would be necessary to identify the expenditures of such organizations to promote tourism. While this may be interesting from a tourism management perspective, it is probably small in terms of monetary amounts. The trade associations should be part of any team effort to improve tourism statistics or build the TSA, however, in which context they should be encouraged to provide data on their own activities; however special outreach in this area seems to be a low priority.

Input-Output Tables: Developing an updated I-O table for Egypt will be of great value for many purposes, of which tourism is only one. Unfortunately, it goes far beyond the scope of any efforts focused on specifically tourism statistics. If a new I-O table is developed, tourism analysts will certainly use it, but it does not make sense to include this among the recommendations of this study.

This discussion suggests four priorities for work in the short run:

1. Revision of the inbound tourism survey to include detail on expenditures according to the WTO categories of tourism characteristic products and to include detail to track the role of the environment in tourism.
2. Include non-resident Egyptians in tourism statistics and inbound tourism expenditure survey.
3. Analyzing the available statistics on domestic tourism to determine how it compares to inbound tourism in both volume and expenditures. Based on the results, a decision should be made as to whether needed information can be obtained from the HIES or a domestic tourism survey is needed. If the latter, work should begin to design that survey and the methods to be used to implement it.
4. Work with the Ministry of Tourism to determine what kinds of data will be needed to design, implement, and monitor the sustainable tourism strategy.

Other data development work, while interesting, should be put off to a second phase of the effort to improve Egypt's tourism statistics.

4.3 Recommendations

An initial effort to improve Egypt's tourism statistics and to organize them using the TSA framework may follow the following steps.

1. Pilot TSA Implementation

Organizing tourism data into the TSA framework will increase the utility of all of the statistics that are available and will highlight both the value of building a TSA and the importance of improving primary data collection. It will lead to the calculation of TVA, which is an important indicator and will be of considerable interest to policy-makers. This will make it possible to quarterize estimates of TVA, following the procedures discussed earlier in this chapter. This should not wait until the completion of one or another specific survey. The compilation and publication of the TSA will have to be an ongoing activity, like the compilation of the national accounts; it does not depend on having a better inbound tourism survey, or a domestic tourism survey, or other information.

For this reason, it is recommended that the compilation of what may be perceived as a first pilot TSA begin immediately, working with the data that are now (or will shortly be) available. The key primary sources for the TSA are the inbound tourism survey, the HIES, the economic census, and perhaps the household labor force survey. The pilot survey should be based on the 2002 and 2004 inbound tourism surveys, the 2004-5 HIES, the 2000-1 economic census and annual updates if appropriate, and the most current data from the regularly updated labor force survey. While these data are not adequate for detailed compilation of all of the TSA tables, they will permit initial estimation of values for most of the tables and of tourism value added. At the same time, compilation of the pilot will build understanding of the TSA and the data it requires. By publishing pilot results, the utility of the framework will be made clear, and a case can be made for allocating resources to more detailed data collection in the future.

The major challenge in building a pilot TSA will be to access the existing data. All of the key surveys are managed by CAPMAS, which is likely to be unwilling to make the full data available to those compiling the accounts. A second best would be to ask CAPMAS staff to do special purpose aggregations of data to provide the information needed for the TSA. Developing such aggregations would require close work with CAPMAS to ensure that they fully understand how the TSA works and what kinds of data are needed. Otherwise the TSA data will be something of a black box, and the TSA staff will not be sure that they are actually measuring what they think they are. One strategy for encouraging CAPMAS to provide access to full data may be to condition the availability of support for additional data collection on full access to existing statistics as well as to statistics whose collection is supported by USAID or other donors.

A number of documents produced for the Ministry of Tourism and the DATA project discuss the institutional framework for the development of an Egyptian TSA.¹² These documents are united in recommending that the TSA be placed under the authority of the Supreme Council on Tourism, and that a Policy Working Group and a Technical Working Group be created to manage the activity. The Policy Working Group would consist of high-level authorities of the agencies that must participate in the TSA, including the Ministries of Tourism, Planning, and Culture, CAPMAS, the Central Bank, trade associations, researchers, and so on. It would be responsible for resolving policy issues related to the accounts, which may include ensuring access to existing data, making decisions about new data collection, and determining the form in which the accounts will be published. The Technical Working Group would include the technical staff people actually involved in building the accounts. The National Accounts Unit of the Ministry of Plan will presumably have core responsibility for building the TSA, with involvement from CAPMAS, the Ministry of Tourism, the

¹² These include Ministry of Tourism undated, James 2003, Sakr 2005, Salem 2003, and Salem 2004, Szumilo 2004.

Central Bank, and other agencies as appropriate. For compilation of the pilot TSA, it will be important to add to the Technical Working Group experts in tourism's satellite accounts who can provide technical assistance to ensure that the WTO standards are followed as far as possible.

The time schedule for building the pilot account will depend on the speed with which the organizations involved can agree to collaborate, and the willingness of CAPMAS to share the data from which the accounts must be built. The schedules proposed in the documents discussing TSA implementation include a few months for setting up the institutional mechanisms, followed by a year of primary data collection before the first TSA is produced. They do not speak of the TSA as an ongoing process that will be updated on a regular basis as new data become available from the different surveys that contribute to it. These recommendations disagree with that time schedule. The pilot TSA can be compiled without waiting for the results of new surveys, which will move the schedule up by a year. It is important, in beginning the work, to plan for its institutionalization, so the TSA is integrated into the national accounts rather than being a one-time experiment.

The aim of TSA pilot work would be to quickly produce several outputs:

- a. An initial set of TSA tables. These will be very rough, as they will be based on existing data, but they will give an idea of what such tables will look like for Egypt. The full data underlying these tables should be made readily available to the public. The Ministry of Tourism is planning to put its other data sources on the web for public access; perhaps the full TSA data can be handled within the same system.
- b. Estimates of the share of tourism in the output of each tourism characteristic activity and estimate of tourism value added. Quarterly estimates of tourism value added, using the index developed by the DATA project and discussed above. These should be published along with other quarterly economic indicators and made widely available on the internet through the SDDS.
- c. Complete documentation of the methodology and sources for everything in the TSA tables. This should be published with the tables, as a detailed technical appendix. Most Egyptian data publications do not provide useful information about the sources of the data, making the statistics difficult to interpret. This information is essential if the results are to be understood properly, and must be available with the data themselves.
- d. Analytical studies that show the utility of the TSA for policy purposes. The development and publication of the TSA is worthwhile because it makes possible more rigorous analysis of the role of tourism in the Egyptian economy. If the data are available to researchers and other ministries, then they can be used freely to consider the impacts of tourism growth, strategies for ensuring that tourism benefits the poor as well as wealthy Egyptians or foreign companies, strategies for ensuring that tourism does not harm the environment, and so on. The studies will be useful in their own right, but a major reason for encouraging such work early in the TSA project is marketing. They will show how the TSA can be helpful, and will thereby generate support for allocating additional resources to improving the statistics and producing a better TSA on an operational basis.
- e. An analysis of the options for improving tourism statistics and thus future TSAs, and recommendations for additional work to be done in order to institutionalize the TSA. That analysis will consider such issues as new surveys, modifying existing surveys to make them more useful, improving the efficiency of ongoing data collection so that results will be more timely, and so on.

2. Revise the Inbound Tourism Survey

The 2006-2007 inbound tourism survey should be conducted using a questionnaire that reintroduces the detail of the earlier surveys, conforms to WTO standards, and incorporates questions with which to identify the role of the environment in tourist revenues. This will involve

collaboration between the Ministry of Tourism, CAPMAS, and technical advisors to design the new survey form. CAPMAS has been carrying out this survey for over a decade, so it already has procedures established for deciding where to distribute the surveys and how to carry them out. The technical advisors should review the procedures for conducting the survey and recommend modifications if necessary.¹³ This work should begin as soon as possible, so that the new questionnaire can be used for the next inbound tourism survey.

3. Analysis of HIES data on domestic tourism

When the data are available for the 2004-5 HIES, a comparison should be undertaken between domestic and inbound tourism. If domestic tourism turns out to be significant in either numbers or expenditure relative to inbound tourism, then consideration should go into how to obtain additional information about domestic tourism. If a decision is made to go ahead with a domestic tourism survey, it should be carried out after the 2006-7 inbound survey; in general, it may be useful to carry out the domestic and inbound surveys in alternate years. Insofar as reasonable, the domestic survey should parallel the inbound one, so that comparisons between the two data sets will be straightforward. It may be possible to do the initial comparison with 1999-2000 HIES data if the underlying data can be obtained from CAPMAS. However, developing and implementing a domestic tourism survey has lower priority than modifying the inbound survey for 2006-7, so jumping into the development of the domestic survey may not be an effective use of time.

4. Inclusion of Non-Resident Egyptians in Tourism Statistics

Including non-resident Egyptians in the tourism and balance of payments statistics should be straightforward, but will require agreement by the Ministry of Interior, the Central Bank, the Ministry of Tourism, and CAPMAS. Obtaining that agreement will probably require extensive discussion and consultation. If there is agreement, it will be necessary to modify the arrival and departure cards complete by Egyptians and the database system used by the Ministry of Interior to track arrivals and departures so that it can distinguish resident from non-resident Egyptians. If this can be done quickly enough, then the 2006-7 inbound tourism expenditure can include non-resident Egyptians as well as foreigners. Until the adjustments in the basic statistics are made, however, then there is no point including non-resident Egyptians in the inbound tourism survey, since there will be no base data with which to extrapolate the results to the visitor population as a whole. Once this change has been made, the calculation of visitor expenditure per night can include non-resident Egyptians in addition to the other categories of visitors, and the balance of payments statistics can include their sales of foreign exchange in Egypt.

5. Sustainable Tourism Data

The identification of data needed to develop, implement, and monitor the sustainable tourism strategy will require work with the Ministry of Tourism, EEAA, CAPMAS, and other agencies, to assess data needs, the extent to which the data are available, and what additional data collection is recommended. This will be a quite different process from the development of the TSA, as it takes a much broader perspective on tourism and involves a different group of institutions. Because there is no structured framework for the data involved here, it will be more difficult to establish priorities than for the development of the TSA. To have significant input into the development of data for the sustainable tourism strategy, the DATA project or CAPMAS might have to go beyond their conventional realm of activity. This may not be appropriate for those institutions; however it may well form an important part of the need for tourism statistics in the future.

¹³ Sakr (2005) provides details about conducting this survey, but does not indicate whether those are the procedures now being followed or recommended alternatives.

Subsequent Phases of Work:

The possible schedule for production of tourism satellite accounts should be determined by the schedule for collection of the major data sources needed for the TSA. The inbound tourism survey is conducted every two years, with the next one beginning in 2006. The economic census is conducted every five years; one will be carried out for 2005-6. The HIES is conducted every five years; data are now being collected for the 2004-5 survey.

This suggests that the first TSA may be produced by the end of 2006, with data from the 2004 tourism survey and the 2004-5 HIES. The most frequent updates of the TSA might be every two years, when the next inbound tourism survey is conducted. Alternately, it might be decided to only produce updates every five years, timing them to take use of new economic census and HIES data. This will have to be decided once the results of the first TSA are in and work is underway on the new inbound tourism questionnaire and other data development.

After the five initial recommended activities have been undertaken, priorities should be established and resources allocated to other improvements in the data collection system. These should include working with trade associations to learn more about the cost structures of package tours, investigation of the cost of youth trips, obtaining detail about government and non-profit organization expenditures to encourage tourism, obtaining more detailed information about expenditures on cultural activities, sports, and other entertainment, and so on. Such work may get underway in 2007 or 2008, depending on when the high priority activities have been implemented.

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Annex A. Egyptian Tourism Data: Primary Sources

To evaluate Egyptian tourism data and how well they measure up to international norms, we must go to its primary sources, the statistical surveys and censuses and the administrative data collected by government agencies or private associations. Tourism data are published in many documents, reports, bulletins, and analyses; however these are secondary data. If the TSA is built, it will be based on the data underlying these publications, obtained from the organizations responsible for collecting them, not on the aggregated or synthesized statistics in the publications.

This annex reviews the major sources of data relevant to tourism about which information was available during the mission. While it is not totally comprehensive, it is a valuable point of departure for understanding available data.

A.1 CAPMAS/Ministry of Tourism biennial survey of departing visitors

CAPMAS has conducted a survey of inbound tourism every two years since at least 1992. The norm for such surveys has been set by the WTO, which has developed a standard questionnaire that they recommend. Through 2002, the WTO survey covered much of the data in the WTO standard. In 2004, however, CAPMAS greatly simplified its questionnaire, removing almost all of the detail about the expenditures of inbound tourism and making the resulting data much less useful.

The 2000-2001 version of the survey captured the following information:

- Q1 nationality
- Q2 country of residence
- Q3 age
- Q4 sex
- Q5 educational background – less than primary through postgraduate degree
- Q6 labor status: employed, retired, housewife, student, or unemployed
- Q7 profession: legislators, senior officials, or managers; specialists or scientists; technicians or special assistants; administration; service or sales labor; farmers or fishers; handworkers; factory labor; ordinary labor; military
- Q8 number of previous visits to Egypt – 0, 1, 2, 3 or more
- Q9 year of last visit to Egypt
- Q10 does your country include other countries; if so, where and for how many nights
- Q11 country where you started your trip
- Q12 country you will visit next
- Q13 airline of arrival
- Q14 airline of departure
- Q15 regular vs. charter flight
- Q16 date of arrival in Egypt
- Q17 port of arrival
- Q18 media affecting decision to visit Egypt: tourist brochures, promotional conferences, friends/relatives, exhibitions, TV, radio, books/study, press, previous visits, travel agency, internet, other
- Q19 purpose of visit: cultural, entertainment/recreation, incentive tourism, visit relatives or friends, conference/exhibition/festivals, medical, commercial/professional, study, religious, other
- Q20 trip organized through travel agency vs. self-organized
- Q21 were you alone, with family, with friends?
- Q22 number and gender of dependents accompanying you
- Q23 nights spent in Egypt by type of accommodation: tourist village, hotel, floating hotel, youth hostel, health care facility, friends/relatives, owned apartment, rented apartment, camping, other

- Q24 name and location of hotel, if you stayed in one
- Q25 form of accommodation: full board, half board, B&B, bed only
- Q26 hotel class: two-star through five star, other
- Q27 number of nights and total expenses for "you and your dependents" by location: Cairo/Giza, Luxor, Aswan, Alexandria/North Coast, Red Sea, North Sinai, South Sinai, other
- Q28 Trip costs for "you and your dependents:" airline tickets, all other costs
- Q29 Total expenses for "you and your dependents" for the following items:
 For tourists not in hotels, accommodation and food and beverages separately
 For tourists in hotels, accommodation and food and beverages combined
 Purchases of handicrafts
 Other purchases
 Domestic flights
 Other domestic transport (referred to as "transfers")
 Sightseeing and museums
 Cultural, recreational, and sports activities
 Newspapers/tobacco
 Alcoholic beverages
 Medical care
 Other
- Q30 How do you compare the price of this trip to other destinations?
- Q31 Assessment of the standards of 29 services provided in Egypt
- Q32 Annual income
- Q33 Where you obtained your visa
- Q34 Amount spent shopping in Egypt
- Q35 Will you visit Egypt next year?
- Q36 Will you visit Egypt in the future?
- Q37 If no, why not?

Questions 27 through 29 and 34 are directly relevant to completing TSA Table 1 on inbound tourism. They raise many questions. First, requesting information about "your and your dependents" clearly can create problems. For a family consisting of parents and children it makes sense, but for many other groupings it does not. For a group traveling together and sharing expenses, especially lodging, it makes sense to collect data about the whole group, but this must be made more explicit, and the use of the word "dependents" clearly is not appropriate. The inclusion of both individual expenditures and those of a group of people who know each other who are traveling together will raise questions about how to ensure that the sample actually represents all inbound travelers, and how to extrapolate from the sample to the whole. This will be particularly important for lodging expenses, since tourists who share rooms will have much lower costs than those who travel alone.

Asking for expenditure information with three different questions may not provide consistent responses. In principle, the totals in questions 27 and 29 should be the same, and they should be the same as the "all other" response to 28. In addition, the response to question 34 might be the same as "purchases of handicrafts" and "other purchases," depending on how respondents understand the terms "shopping" and "purchases." Perhaps the information is requested several times in order to identify errors in response, to seek the information in several different ways on the assumption that respondents will not actually know how much they spent in each category. In this case, users of the data will have to determine how to reconcile the information if each question elicits different responses.

The data in question 29 can be included in TSA Table 1 on the following lines:

For tourists not in hotels, accommodation and food and beverages separately – lines 1.1 and 2

For tourists in hotels, accommodation and food and beverages combined – presumably this is for visitors whose hotel includes meals with the price of the room. The total could be divided between lines 1.1 and 2 based on the relative expenditures on lodging and food by tourists who are not in hotels. However if a significant number of tourists not in hotels are in fact not paying for lodging at all, because they are staying with friends and family, this would not provide an accurate way to disaggregate the data. Possibly the “tourists not in hotels” line actually is meant to ask for information from tourists whose meals are not included with the price of their hotel room, not tourists who actually are not in hotels; this could be a language problem in the translation of the form.

Purchases of handicrafts and other purchases – “characteristic products” in the TSA tables actually include only services, and not products. Therefore both of these items will be included in line A.2, connected products.

Domestic flights – line 3.4

Other domestic transport (referred to as “transfers”) – Since this is not disaggregated by mode, it cannot be placed on the other two-digit characteristic product lines. It would therefore have to go on line 3, in a total that also includes air transport.

Sightseeing and museums – line 5.2, “museum and other cultural services”

Cultural, recreational, and sports activities – the classification of characteristic products does not include cultural activities in category 6, for “recreation and other entertainment services,” since they are part of category 5. This could be overlooked and amounts provided in this question might be included on line 6. The extent of error introduced is not clear.

Newspapers/tobacco – line A.2, connected products

Alcoholic beverages – line 2, food and beverages

Medical care – Although travel for medical purposes falls within the WTO definition of tourism, the costs of the medical care itself – other than accommodation, food, and so on – does not fall within characteristic products. It could perhaps be included in connected products, on line A.2.

Other – Included in the total on line A or in 7.3, other tourism services.

Unfortunately, in 2004 CAPMAS greatly simplified the survey of departing visitors. The 2004 survey asked the following questions:

- Q1 nationality
- Q2 number of nights spent in Egypt
- Q3 number of dependents
- Q4 Total expenditure for your trip, for you and your dependents. For individuals, the questionnaire differentiates plane fare and other expenses. For group trips (presumably also package tours) it asks for the cost of the tour and other expenses. It does not indicate whether the cost of the tour should include the plane ticket. Since information about airline is requested in the next question, it is possible to distinguish airline tickets that are included in the Egyptian national income accounts (i.e. Egypt Air tickets) from those that are not (all non-Egyptian airlines); however without knowing the ticket price for package tours, this is of limited use.
- Q5 date and airline of arrival
- Q6 date and airline of departure
- Q7 port of departure
- Q8 Principle purpose of trip – same choices as in the 2000-2001 survey

- Q9 Number of nights in each type of accommodation – same choices as in the 2000-2001 survey
- Q10 Did you stop in other countries on your trip?
- Q11 If yes, where and for how many nights?
- Q12 comments

This survey reduces the information available on inbound travel to the total cost of the trip. From the available data it is possible to estimate per night per person cost for those on individual trips. For people traveling on package trips that estimate will be feasible if the total cost of the trip does not include the airfare. All other detail about expenditures has, clearly, been eliminated.

It was not possible to determine for sure why the survey was simplified so drastically. It may have been felt that the detailed information was not in fact being use, and that the response rate would be higher with a much simpler survey. There may also have been concerned about the time delays involved in processing the more complex survey, leading to a decision to simplify the form. To assess whether this was a reasonable decision, we would need much more information about how the data are being used, and how additional data might be used.

To estimate the aggregate economic impact of inbound tourism, we want to know how tourist expenditures affect GDP and employment in the economy as a whole. This includes the share of GDP and employment generated by the tourism characteristic activities (direct impacts) and the multiplier effects, i.e. the consumption of input goods to produce characteristic products. With disaggregated expenditure data, we would use different multipliers for different types of consumption. For example, the employment and indirect expenditure generated by international air transport may be different from those generated by hotels, restaurants, domestic travel, or other tourist expenditures. The different multipliers would be generated by analysis of the different sector of the Egyptian economy, using the input output table if it exists or other analytical tools. If the only detail we have is between international transport and "all other," however, then we will need a composite tourism multiplier to estimate the indirect effects of inbound tourism. Such a multiplier might be borrowed from a similar country, or estimated based on guesses at the share of each expenditure type in the total. It is possible that the greater accuracy and higher response rate with the simpler survey may outweigh the loss of actual detail, and the resulting estimates of total economic impact may be as accurate with the simpler form as they would have been with the detailed one. Whether this is actually the case might be assessed in part by comparing response rates with the 2004 survey and the earlier ones.

Of course there are many uses for the information in the detailed survey other than analyzing the economic impact of tourism as a whole. The detailed survey – or a somewhat revised detailed survey – could make it possible to identify which activities bring in the most money, observe changes in expenditure patterns, and so design tourism strategies for the future that will respond to changing world demand. The detail is likely to strengthen Egypt's ability to determine how to maximize revenue from tourism in comparison with the simpler survey.

Another problem limits the information provided by both of these surveys. Only foreign visitors to Egypt are surveyed, whereas Egyptians living abroad who return home for visits are not covered by inbound tourism. While they are likely to spend little on accommodation, since they will lodge with friends or family, they are likely to spend a lot in other areas, so their expenditures should be accounted for in the survey. This will create distortions in many areas, particularly analysis of the impact of foreign tourism on the Egyptian economy and the balance of payments data for travel. It is associated with another problem, in the data from the arrival and departure cards, which are used to calculate the number of visitors and visitor-nights in Egypt; this is discussed in A.6 below.

A.2 Household Income and Expenditure Survey

In many countries, data on domestic tourism are collected from household consumption surveys. The 1999-2000 Egyptian Household Income and Expenditure Survey (HIES) includes some questions on tourism expenditures, but does not ask for enough detail to complete the relevant tables of the TSA.¹⁴ Two TSA tables could be filled by HIES data. Table 2 includes domestic tourism consumption, i.e. the expenditures by Egyptian residents while traveling in Egypt and their expenditures in Egypt in preparation for or following up on trips out of the country. Table 3 covers outbound tourism consumption, i.e. the expenditures of Egyptian residents when traveling in other countries.

The HIES form begins with a set of questions about residents of the household (names, ages, gender, employment or other work, etc.). It asks about the home itself (physical characteristics, whether it is owner-occupied, rented, provided by an employer, etc.), and telecommunications and other equipment available in the house. In this part of the form it also asks about visitors to the household ; how many there were, their relation to the household (family, etc.), gender, age, and how long they stayed. This portion of the form also asks about household members traveling abroad for work.

The form does not ask whether this is a second home or vacation home owned by the household; it is not even clear whether part-time second homes would be surveyed in the HIES. Second homes are a tourism characteristic product, item 1.2 in the TSA tables and code 72211.1 in the classification of tourism characteristic products. They are to be valued based on the imputed rent that would be paid on a similar property. Since there is no way to identify second homes from the HIES, this survey will not help with that detail in any of the TSA tables. However the HIES is a possible route through which to scope out the magnitude of second home ownership and perhaps obtain information with which to track this issue for the TSA. If such data were to be collected through the HIES, it would be tracked in TSA tables 5, 6, and 8, in the rows and cells for imputed ownership of housing.

The bulk of the form consists of a table of commodities and space to fill in how much the household consumed of each and the value of its consumption. The commodities listed include food, drink, tobacco, clothing, fuels, household consumables and durables, transportation, and so on. For household durables, the form asks the total value of items purchased during the previous time period, the amount already paid for them, and the amount remaining to pay (if they were bought on credit).

Certain items within this consumption list may be relevant to the TSA:

- P. 44 Code 2439.¹⁵ The form asks about expenditures for medical care, including about twenty different items. One of the items requested is medical expenditures outside of Egypt. It is not clear from the form itself (according to the translator) whether this includes all expenditures incurred in order to seek treatment abroad, including transportation and lodging, or only the cost of medical care itself. Travel for medical care does fall within the WTO definition of tourism, so if this item question includes travel expenditures, they would be included in TSA Table 3. The HIES does not request any breakdown of expenditures on this line, so none of the detail in TSA Table 3 could be completed.

¹⁴ This discussion is based on an informal translation of the 1999-2000 version of the HIES. Apparently the form has not changed in more recent versions; however it is possible that some wording or page numbers may be different. For more precise details on the information captured by this survey, please see the original questionnaire in Arabic.

¹⁵ Some lines of the HIES form include codes for the information requested. They are cited in this discussion where they are provided; however they are not provided for all items in the form.

- P. 45 Codes 2501 to 2508 and 2599. This page asks about expenditures to purchase vehicles including private cars, bicycles, motorcycles, and other vehicles. WTO debates on the TSA raise the question of whether or to what extent vehicles may be purchased in order to engage in tourism;¹⁶ in some countries a vehicle may be purchased in part because of travel plans. This is less likely to be a concern in Egypt than, say, in the United States, whose representatives pushed for this distinction in the TSA. In any case, the HIES does not provide any way to allocate any portion of vehicle purchase costs to travel and tourism. If we had data on the mileage traveled and purpose of that mileage, then the capital cost of vehicles could be prorated and a share allocated to TSA Table 8, consumption of fixed capital, on line 3.1 for surface travel.
- P. 45 Codes 2601 to 2612 and 2699. This page asks about costs associated with using a vehicle, including gasoline, maintenance, repairs, spare parts, long-term garaging or short-term parking, insurance, and so on. If there were questions to determine the share of mileage that was for tourism, then the data in this table would be used to allocate vehicle operating costs to tourism, on lines 3.2 of TSA Tables 2 and 3, which cover road travel. However the HIES does not include any such questions about use of the vehicle. Similarly we cannot determine whether the vehicle was used in Egypt or out of the country, in order to allocate the expenditures between TSA Tables 2 and 3.
- P. 46 Codes 2701 to 2703 and 2799. This table asks about payments for transportation services, including bus, train, taxi, domestic air and sea transport, and the costs for transporting large household items such as furniture. There is no way to determine how much of the surface transportation may have been for tourism. However we may guess that all of the air or sea transport will be for purposes that fit within the WTO definition of tourism. This table therefore provides some (incomplete) data on transportation costs for domestic tourism, which may be entered on lines 3.3 and 3.4 of TSA Table 2. Because the HIES does not specify whether the travel was for day trips or longer ones we have to enter these values in the column for the total of the two. Similarly we cannot determine whether the transportation occurred in Egypt or out of the country, in order to allocate the expenditures between TSA Tables 2 and 3. It may be reasonable to guess that transportation for travel out of Egypt would be allocated to “other tourism” on page 50 (below), and therefore all of this travel is domestic. However the instructions on the questionnaire to not specify that it should be completed in that way.
- P. 46 Codes 2802 to 2804. These questions pertain to expenditures for telecommunications, including home phone, car phone, mobile, and fax. For those who travel, some of these expenditures will properly fall within the TSA, as connected products on line A.2 of TSA Tables 2 and 3. However there is no way to allocate them. In any case, they are likely to be very small, so the inability to allocate them to tourism is not major in terms of the numbers.
- P. 47 Codes 2901 to 2921 and 2999. This table pertains to education. It does not include any specific questions about travel for educational purposes. Such travel would be included in the WTO definition of tourism, but the HIES does not identify it.
- P. 48 Codes 3015 to 3018. These lines pertain to purchases of sports equipment. In some countries, such equipment might be purchased for travel purposes, e.g. scuba equipment. This is less likely to be the case in Egypt; in any case, the HIES does not provide any way to assess whether the purchases are associated with travel plans. If that information were available, the share attributable to travel would be entered as connected products on line A.2 of TSA Tables 2 and 3.

¹⁶ Libreros pp. 28-35.

- P. 49 Code 3109. This line includes the cost of school trips, i.e. organized trips taken by students, either within Egypt or internationally. There clearly is a part of tourism and should be included in the TSA. There is no breakdown of expenses within the line item, however, so we cannot allocate between domestic and outbound tourism, nor can we distinguish among the different costs within the trip. We also cannot determine what share of the expenditures go to Egyptian (resident) enterprises vs. foreign (non-resident) ones (hotels, airlines, etc.), and therefore how they would fit into a tourism balance of payments account. The total on this line may be entered in TSA Table 4 on line A.1 for characteristic products, but none of the detail required by product is available, nor is the data for TSA Tables 2 and 3.
- P. 49 Code 3110. This line includes weekend trips, presumably by the family or members of the household. It does not define what constitutes a “weekend trip,” nor does it provide for any disaggregation of the expenses involved; domestic vs. international, type of expense, whether recipients are resident or non-resident enterprises. It does not explain why it includes weekend trips but not, say, week-long trips, day trips, etc. The total amount on this line should be included in TSA Table 4 on line A.1, but clearly it does not provide the information required for the details by product, nor for TSA Tables 2 and 3.
- P. 49 Codes 3111 to 3113. These lines ask for information about expenditures for “travel within Egypt during summer or winter.” The translator explained that this pertained to trips made regularly every summer or winter, as when a family returns to its home village once a year to see other family members. They fit within the WTO definition of tourism, and therefore should be included in the TSA. The three lines ask for the costs of lodging, entertainment, and “all other expenses.” These values may be entered in Table 2 on lines 1.1 (lodging), 6.0 (entertainment), and 7.0 (miscellaneous, for all other).

Codes 3111 through 3113 do not ask whether the travelers stay with other family members or pay for lodging, though by asking for lodging costs it may imply that if these are zero, then they are staying with family. After much discussion, developers of the TSA decided that a value should be imputed for lodging with family or friend, or for staying in summer homes owned by the travel or by others, even if the travelers do not actually pay for the time spent in the lodgings. This would be entered in TSA Table 4, in the column for consumption in kind.

This question (code3111) will not provide enough information to do complete this cell, however. It is also not clear how respondents are to define entertainment; for example, does food at a restaurant with a show constitute entertainment or other? The questions do not distinguish transportation costs at all. Disaggregating these and other costs may be a fairly simple way to get more useful information from this question.

- P. 50 Codes 3201 to 3205. These lines ask for food expenditures in restaurants and coffee houses. There is no way to distinguish which of these expenditures are made while traveling, so a share of these cannot be usefully included in Tables 2 through 4.
- P. 50 Codes 3206 and 3207. These lines cover lodging and other expenses for travel except for those during regular summer and winter travel. According to the translator, it is not clear in the Arabic whether “other expenditures” are for lodging expenditures other than hotels (e.g. pensions, hostels, camping, etc.) or whether they pertain to other travel costs other than lodging. If the aim is to capture all travel expenditures in the HIES, then clearly the latter would make more sense; however that is not necessarily how respondents complete the form. These lines also do not allow us to distinguish between expenditures in resident vs. non-resident enterprises. Not knowing how much to allocate to internal tourism consumption, we cannot even complete TSA Table 4 with these data, since that table does not include outbound tourism.

- P. 53 Code 3530. This line includes expenses for religious tourism, which falls within the WTO definition of tourism and should be included in the TSA. It does not provide any disaggregation of the costs by type, whether the supplier is resident or non-resident, etc. As all religious tourism is international, the total may be included in TSA Table 3 either on line A.1, characteristic products or line 7, miscellaneous.
- P. 53 Code 3531. This line includes expenditures for leisure tourism. It is not clear how this should be differentiated from the other tourism codes, notably 3110 to 3113 or 3206 and 3207. The instructions do not make this clear, so different respondents may fill out these items differently. Again, it does not distinguish among types of expenses, between domestic and outbound tourism, or between expenditures in resident and non-resident suppliers. Without additional information it is not possible to place these data in the TSA tables, though obviously they should be either in Tables 2 and 4 or in Table 3.
- P. 53. Code 3532. This line is for other expenditures outside of the country, including conferences. There is no further detail on these expenditures, and the instructions do not provide further information about what to include. These costs should be included in TSA Table 3; with the current level of detail they would go either on line A.1, characteristic products, or 7, miscellaneous.

The detail provided in the HIES provide some information about domestic tourism and outbound tourism, and for the most part it is possible to place these data in the TSA tables. As discussed, however, there may be overlaps in the information provided on the different line items, and some categories of expenditure may not be included at all, so this will be at best only a rough estimate. Moreover, the form does not include most of the detail called for by the TSA.

The 2004-5 HIES, which is still being carried out, is in most respects similar to the 1999-2000 HIES. However it obtains less detailed information pertaining to tourism expenditures. On page 6, it asks whether anyone in the household has traveled within Egypt or outside of Egypt over the survey year. If the response to either question is yes, they are directed to page 67. The table on that page asks for:

| | |
|---------|---------------------------------|
| 0960101 | School trips within Egypt |
| 0960102 | Weekend trips within Egypt |
| 0960103 | Summer or winter trips |
| 0960104 | Other trips within Egypt |
| 0960105 | Pilgrimage travel outside Egypt |
| 0960106 | Other trips outside Egypt |

The published data from the 1999-2000 HIES do not disaggregate the data on tourism. The most detailed figures available in published reports group the tourism questions with expenditures for entertainment. The compilation of the TSA Tables 2 and 3 will therefore depend on having access to unpublished data from CAPMAS from the HIES.

There is likely to be a bias in the HIES data towards higher income people, because they may be more likely than low-income people to complete the complex questionnaire accurately, or indeed to respond to it at all. The survey asks for income as well as expenditure information, so the results can be stratified by household income, and the income distribution in the responses compared with other data on the income distribution in the country. If the other income distribution data, which might come from the household labor survey or from the census of population, are considered reliable, then it may be feasible to adjust the expenditure figures to increase those coming from underrepresented income groups and decrease those from overrepresented groups. Any such adjustments, however, would have to be undertaken carefully, to avoid creating more distortion than may already be there.

A.3 CAPMAS survey of hotels

CAPMAS conducts an annual census of places of accommodation, gathering information about their capacity, their occupation rates, the origins of their visitors, their expenditures, their revenues, and other data. These data will provide input to tables 5 through 10 of the TSA. A review of the questionnaire indicates how this database provides information for the TSA. This review is based on an informal translation of the 2004 questionnaire provided by a staff member of the DATA project. For full details, see the Arabic version of the form.

Page 1 Identifying information about the hotel.

Q. 1 Name of the hotel – this pertains to this hotel, not the chain that owns it.

Q. 2 Owner or manager.

Q. 3 Type of accommodation; hotel, pension, tourist village, motel, youth hostel, or floating hotel (cruise boats).¹⁷ There are two separate hotel questionnaires, one for the first five types listed here and the other for floating hotels. Aside from the question about type of accommodation, however, they are identical.

These categories differ from the lodging categories in the WTO classification of tourism characteristic products, which are:

| | |
|----------------|---|
| 63110.0 | Hotel and motel lodging services |
| 63191.0 | Holiday centre and holiday home services |
| 63192.0 | Letting services of furnished accommodation |
| 63193.0 | Youth hostel services |
| 63194.0 | Children's training and holiday camp services |
| 63195.0 | Camping and caravanning site services |
| 63199.1 | Sleeping-car and similar services in other transport media; residence of students |

For TSA purposes it may be useful to reconcile them. The Egyptian categories of hotel, pension, tourist village, motel, and floating hotel might be coded as 63110.1 to 63110.5, respectively, and then totaled as 63110.0 for comparison with the data of other countries. Presumably the other WTO classes do not exist in Egypt. In the column headers of Tables 5 and 6, which are organized by SICTA categories, category 5510 for accommodation could be disaggregated into 5510.1 to 5510.6 to show different types of accommodation.

Q. 4 Has the investment in the property been made by Egyptians, other Arabs, or other foreigners? This question gets at an important issue in assessing the economic impact of tourism, whether the profits will stay within the country or go outside of it. However Table 8 of the TSA, which tracks gross fixed capital formation in tourism, does not distinguish whether the source of investment capital is domestic or international.

Q. 5 Is the hotel public or private? Data on publicly owned hotels could become part of the "other services" line of Table 9, on public expenditures on tourism. If publicly owned hotels are classified along with private ones, then the SICTA category 5510 for hotels could be disaggregated further to show public and private hotels in each of the six types.

¹⁷ Although the questionnaire distinguishes among six types of accommodation, only one of which is referred to as "hotels," for simplicity this report will use the word "hotel" to refer to any accommodation unless the technical distinction is necessary.

Q. 6-8 Name, address, and phone of the corporation owning the hotel.

Q. 9 Legal form of the entity owning the hotel, e.g. corporation, limited corporation, individual, foreign establishment, etc. The distinction between foreign and domestic ownership may be important for analysis of the economic impact of tourism, although this is not captured within the TSA.

Q. 10 Year when the hotel was established legally and when it began operation.

Q. 11 Class of hotel (one-star to five-star, unclassified, or in process of classification). If desired, the hotel product and SICTA codes could be disaggregated to capture this distinction.

Page 2 Contains notes for completing the form.

Page 3 Table 1: Number of rooms with 1 bed, 2 beds, 3 beds, or 4 beds, or more than four beds. Number of other rooms that could be converted to sleeping under special circumstances, and number of beds that could be put in those rooms.

Table 2: Number of rooms with each of a list of facilities; bathroom, radio, TV, refrigerator, fan, heat, A/C, phone, or none of the previous facilities.

These data will not be captured by the TSA.

Page 4 Table 3a: Does the hotel have the following facilities: swimming, restaurant, coffee shop, bar, entertainment, meeting rooms, parking, other (list them)

Table 3b: Does the hotel have the following facilities/services: vehicles; organized tours; laundry; telex, fax, telegraph, email, or internet; others (list them)

The TSA is not likely to capture the responses to these questions, though data from subsequent questions on the revenues from some of these services will be captured (see page 10).

Page 5 Table 4: Number of visitors and number of visitor-nights by visitors from Egypt and a list of eight other regions. Table 10 of the TSA tracks visitors and visitor-nights, but these data will come from other sources, since the hotel survey only includes a subset of the visitors.

Page 6 Table 5: Information about the gender, nationality, educational level, and languages spoken by hotel employees. Employees are classified according to non-wage earners (owners and others) and wage-earners (owners; managers, technical and office workers; supervisors; service workers; technical services; and others); these are standard ILO classifications for employment status. Table 7 of the TSA tracks employment in the tourism industries, i.e. in the twelve tourism characteristic activities, of which hotels are the first. The table asks for the total number of employees by gender, so line 1 of the TSA table can be completed based on Table 5 of the Egyptian survey. The additional data in the Egyptian Table 5 will not be captured by the TSA.

Enterprises are classified in the accounts based on their primary activity, even if they engage in several different activities. Therefore a hotel with restaurants, sports facilities, and other services would be classified with hotels, and revenue from all of its services would show as revenue for the hotel sector, not the restaurant or sports sectors. Following this principle, hotel employees who work in the restaurants or sports facilities would be entered in the TSA as employees of the hotel sector, not of the sectors in whose activities they are actually engaged.

If, however, a hotel rents space to a restaurant that is a separate enterprise, or to an independent sports club that allows hotel guests to use its facilities, then information about the restaurant or sports club (or other similar facility) should not be provided in the hotel survey, if the results are to be compatible with principles of the national accounts. This is not made clear in the hotel survey, so in such cases the data provided may be inaccurate.

Page 7 Table 6: Data on wages, social benefits, and other benefits to workers, classified as in hotel Table 5. These data will be recorded in TSA Table 5, in the cell for the compensation of employees for the hotel sector. Since enterprises are classified into SICTA categories based on their major activity, wages going to workers in the restaurant, entertainment, sports, and other services provided by a hotel will go in the hotel cell, not the cells for compensation of employees in restaurants, entertainment, and so on. As discussed for hotel Table 5, however, wages for employees of enterprises renting space within the hotel should not be included in the hotel survey or in the hotel cell of TSA Table 5.

TSA Table 6 disaggregates the data on compensation of wages into the portion paying for tourism services and the portion paying for other services. While all employees involved with lodging can probably be classified with tourism, employees providing food service, sports facilities, entertainment, casinos, and other services are working both for tourists and for locals making use of hotel services. Hotel Table 6 does not provide any way to disaggregate these wages. It is possible that a lower bound estimate could be made for the tourism share based on the revenue data in hotel Table 9 (below).

Page 8 Table 7: Total value of employee benefits, including meals, transportation, medical care, social activities, lodging, and others. The value of these benefits should be added to wages and social benefits in calculating the amounts entered in the “compensation of employees” cells of TSA Tables 5 and 6.

Page 9 Table 8: Input costs to the hotel. These are organized into expenditures for: food products, spare parts, office equipment, water, electricity, fuel, and other commodities; rents, repairs to building, vehicles, furniture, tools and equipment; publishing and advertising; worker transportation, overseas travel for workers, transporting equipment, and mail and telegram; non-employee earnings and short-term contractors, commissions, musicians and other specialists; rent on vehicles, tools, clothes, films, and other items; taxes and fees; and other payments including to clubs providing services to guests, insurance, banking, interest, professional services including accounting and legal, contributions to social causes, debts that won’t be repaid, and expenditures from the previous year.

Tables 5 and 6 of the TSA include data on intermediate consumption of the twelve tourism characteristic activities, organized by the major categories of the CPC. Table 5 shows total intermediate consumption by the characteristic activities, while Table 6 shows total consumption and the share of that consumption that is for consumption through tourism. The data in hotel Table 8 can be organized into the CPC codes to give the total intermediate consumption of hotels. The hotel questionnaire does not indicate how much of the inputs are used to produce products consumed by tourists, however, so determining the tourism share (for restaurants, sports facilities, etc.) may not be possible. The revenue data in hotel Table 9 may be used to derive a lower-bound estimate of the tourism portion of input costs.

One important issue in analysis of the economic impact of tourism is the extent to which the intermediate consumption of tourism enterprises is imported, and therefore the multipliers that should be used to calculate the indirect impacts of tourist activity on the economy. The hotel questionnaire does not make this distinction in asking about input costs. If it is assumed that the consumption of hotels represents the import structure of the rest of the economy, this is not a problem. However, in some countries a disproportionate share of hotel inputs is imported, in which case using average import shares for each import category

may significantly distort the impact of tourism on the economy. To the extent that this is the case in Egypt, it may be useful to find a way to incorporate information about imports in the hotel survey.

- P. 10 Table 9: Hotel revenues by service: lodging; coffee shops, casinos, meeting rooms, laundry, phone, shops, hotel share of revenues from other activities, revenue from previous years, external payments, stocks, and others. Some of these categories are not quite clear on the form. It is not clear where restaurant income is categorized, nor income from sports facilities, entertainment other than casinos, tours organized by or accessed through the hotel, and so on. It is also not clear what the “share of revenue from other activities” refers to, nor the external payments and stocks.

These data can be used to complete some of the hotel output data in TSA Tables 5 and 6. The data on revenue from lodging, laundry, and phones, can be entered in row 1.1, for the output of lodging and other services in TSA Table 5. Since presumably all lodging is used by travelers, it can also be entered in both hotel cells of line 1.1 in Table 6. The revenue from coffee shops can be entered on TSA Tables 5 and 6, line 3, food and beverage services, and casino revenue on line 6.2, other amusement and recreation. For these two items, it is not clear how to disaggregate tourist revenue from non-tourist revenue.

For purposes of the TSA, it may be useful to modify this table of the hotel questionnaire, structuring the list of revenue sources according to the classification of tourism activities.

- P. 11 Table 10: Value and change in value of assets, for land, buildings, machines and equipment, vehicles and boats, tools, furniture and office equipment, and others. For each category the table asks for starting value, value added during the year, sales and assets that have gone out of order, depreciation, and value at the end of the year, which is calculated as starting value plus VA less sales, out of order, and depreciation.

TSA Table 8 tracks data about gross fixed capital formation in categories that are quite different from the hotel questionnaire ones. The hotel table has only one value for change in value of buildings, whereas the TSA disaggregates this in some detail by type of building. The single hotel value for buildings would have to go on line A.1 of TSA Table 8, under Tangible Fixed Assets. The hotel value for vehicles and boats would go on TSA Table 8 line 3, Passenger Transport Equipment. The three different equipment lines in hotel Table 10 would be aggregated on TSA Table 8 line 4, Machinery and Equipment. The change in land value recorded in hotel Table 10 is not captured in TSA Table 8, unless in fact the value entered on the questionnaire is change in value due to investments in land improvements (sewage, water supply, etc.). Any values transferred to TSA Table 8 must be calculated as starting value plus value added less sales and out of order assets, without including depreciation, since the TSA table records gross fixed capital formation; i.e. capital formation without adjusting for depreciation.

For TSA purposes, it may be useful to add detail to hotel Table 10, particularly differentiating types of buildings and changes in their value. This will make it more feasible to differentiate among the different services offered by hotels, and perhaps eventually to distinguish revenues from tourists from non-tourism revenues.

The hotel survey also includes a supplementary questionnaire on computer equipment and activities of the hotels and their fire safety equipment and skills. These data are not monetary and would not be included in the TSA.

A.4 CAPMAS Economic Census and Annual Survey of Establishments

CAPMAS conducts a five-yearly economic census and an annual survey of establishments to update the census data in intercensal years. The census and the annual surveys use the same questionnaires; only the sample is different. There are ten different forms of the questionnaire, for ten major sectors of economic activity. Of these, several may be useful for compiling tourism statistics, including those for retail trade, restaurants and coffee shops, transportation, services, and so on. The annual hotel census is likely to provide more detailed information about lodging, but the economic census data may be useful for cross-checking.

Unfortunately, it was not possible in the course of this mission to obtain translations of the economic census questionnaires, so detailed information is not available for this data source. In general, however, they request information about outputs of each enterprise, employees, input costs, and so on. These data will be used primarily to estimate the share of expenditures for tourism-characteristic products that should actually be allocated to tourism in the calculation of tourism value added and for TSA tables 5, 6, 7, and 8.

The way this is done is fairly straightforward, if the data are available. The share of a sector's output, employment, or value added to allocate to tourism is calculated based on the share of that sector's output which is consumed by tourists. The numerator in this ratio, the quantity consumed by tourists, can – if sufficiently detailed data are available – be obtained from the inbound tourism survey and the HIES. (The actual survey values must, of course be extrapolated to all tourists based on the number of individuals surveyed compared with the total number of tourists.) The denominator is the total output for the same sector from the economic census or survey. That is:

share of sector X output to allocate to tourism (S_x) =

$$\frac{\text{Output of sector X consumed by inbound and domestic tourists (from inbound survey and HIES)}}{\text{Total output of sector X (from economic census or survey)}}$$

This ratio is applied to many of the values derived for sector X to determine the portion that should be allocated to tourism; employment, wages, value added, and investment. That is:

Sector X tourism employment = S_x * total employment in sector X

Sector X tourism intermediate consumption = S_x * total intermediate consumption in sector X

Sector X tourism investment = S_x * total investment in sector X

and

Sector X tourism value added =

$$S_x * \text{total value added in sector X} =$$

$$\text{Output of sector X consumed by tourists} \text{ less } \text{sector X intermediate consumption}$$

For this to be done accurately, the economic census and survey data must be reliably disaggregated to the four-digit ISIC code level, since that is the level at which tourism characteristic products and activities are defined. The census and survey forms ask the respondent to describe its activities, on which basis a CAPMAS analyst assigns an ISIC code. To use these results, it must be possible to assign those codes reliably at the four-digit level. This may not be too difficult. Most tourism characteristic activities are fairly clear and easy to understand; hotels, restaurants, transportation, different forms of entertainment. Unlike some other activities, these should be simple to describe in a questionnaire and classify accurately. If so, it should be possible to obtain reasonable tourism data based on the information in the economic census. For the annual surveys, however, it is possible that the sample size will not be large enough to provide accurate disaggregation to the four-digit SIC code level. There may also be questions about the representativity of the samples chosen for the

annual surveys; if they do not actually reflect the large population, then tourism data in the intercensal years would be similarly inaccurate.

Another problem could arise if the tourism characteristic products are secondary products for the enterprise, and all of its output is assigned to its primary product. This will certainly be the case for hotels, which are likely to derive the largest share of their revenues from lodging but also provide restaurants and entertainment, for which the revenue streams will be misclassified. The problem of misclassification of data pertaining to secondary products arises throughout the national accounts, and is not particular to tourism accounts. However, the TSA tables ask for the output of each tourism characteristic product by each tourism characteristic activity, which means that they should be able to track output of each product both from the enterprises for whom this is a primary product and from those for which it is a secondary product. Whether it is possible to obtain this data will depend on the level of detail at which the census questionnaires ask about the outputs of each enterprise. Since we have not been able to access detail on the questionnaires, this question could not be resolved.

Assuming that these calculations can be made, the data from the economic census and the annual surveys would be used to help calculate values for TSA Tables 5 through 8. The tables in Annex B show where the economic census data should be useful, but due to the lack of detailed information we cannot be specific about which forms or questions will be used to complete which cells of the TSA tables.

A.5 CAPMAS Household Labor Force Survey

The CAPMAS labor force survey is conducted quarterly, surveying 21,000 households per quarter. The results may help identify the number of people working in tourism characteristic activities. The survey is organized in three tables:

Table 1 Demographic features of family members. This table identifies the members of the family, finding out about each his or her name, relation to the household head, gender, age, education level, training certificates, and marital status, whether the person is working, looking for employment, or not in the labor force because of their age, they cannot work, they are a student, or other reasons.

Table 2 For those who are employed, this table asks whether they are salaried, the owner of an enterprise employing others, self-employed, or an unpaid household worker. If they work for an establishment, they are asked its name. Whether or not they are in an establishment, they are asked their (or their establishment's) main activity, sector (government, private, public enterprise, investment company, foreign company, other). They are then asked about their own employment; occupation, years in this occupation, whether they have had a different occupation and if so what it was, days and hours worked. They are also asked whether their employment is permanent, temporary, seasonal, or intermittent. If they are salaried, they are asked how often they are paid and how much.

Table 3 This table collects information about unemployed people, including whether they have just joined the labor force or were previously employed, their last occupation, for how long they have been unemployed, and why they are unemployed.

The main question of reference to the TSA is in Table 2, the main activity in which each person's employer is engaged. This table is completed with the assistance of an interviewer, who fills in this cell on the table with a description of the sector in which the person works. Specialized classifiers in within CAPMAS then assign ISIC codes to the activity. Whether this is useful for the TSA depends on several things. First, the household member providing the information may not have a full understanding of what his or her employer does, nor of some of the other details about their

employment. For this reason, employer surveys are often used rather than employee surveys to classify the labor force by ISIC code; in Egypt that would mean using the economic census or annual surveys rather than the household labor force survey to obtain employment data.

The level of detail at which the classifications are made by the CAPMAS staff will also determine whether the labor force survey can be used to allocate employment to tourism characteristic activities. As in the case of the economic census, the CAPMAS analysts would have to accurately assign four-digit ISIC codes based on the description of the activities of the employer provided on the questionnaire by the respondent. Descriptions provided by employees may not be sufficient to ensure correct coding by the CAPMAS staff. As in the case of the annual establishment surveys, moreover, the sample size for the household labor force survey may not be large enough to ensure accurate disaggregation to the four-digit ISIC code level.

If the household labor force survey is used, it would provide information for TSA Table 7, which tracks the number of jobs and number of workers in tourism characteristic activities. The first column of TSA Table 7 provides the number of establishments and the second, disaggregated by gender of the workers, provides the number of jobs. These data would be provided by the employer, not the workers, and therefore cannot be obtained from the household labor force survey.

The third set of columns concerns the status in employment. This refers to the first point in Table 2 of the labor force survey, concerning whether the respondent is a paid employee, self-employed, an employer, or an unpaid household worker. The first three sub-columns present the number of employees, by gender and total, and the second three sub-columns present all other categories of workers, by gender and total. The fourth set of columns in TSA Table 7 presents the sum of the third set of columns. This information can, therefore, be obtained from the labor force survey.

Most of the ISIC codes included in tourism characteristic activities are only partly related to tourism in Egypt; this is true of all except hotels and perhaps travel by air. The WTO recommends that the cells in TSA Table 7 be completed with full data about the ISIC codes in question (WTO 2002). This means that the third and fourth sets of columns in the table can be fully completed using the household labor force survey. However it inherently limits the utility of the results for the analysis of tourism, since the table will capture much employment that is not, in fact, attributable to tourism. Moreover, there is employment in other ISIC codes that have not been classified as tourism characteristic activities, which will not be captured in TSA Table 7. Consequently, the totals from TSA Table 7 will only roughly approximate employment generated by tourism.

A.6 Arrival and Departure Cards

On arrival or departure in Egypt, all travelers complete cards providing basic information about their identity and travels. These cards are collected by the police on entry into or departure from the country, and the data managed by the Passports, Nationality, and Immigration Administration of the Ministry of Interior. For non-Egyptians, these cards ask name, date of arrival flight number or mode of arrival, nationality, passport number, purpose of visit, address in the country, and dependents traveling with the person filling out the card. When the visitor goes through immigration, the agent enters his or her passport number in a computer, which looks it up in a database maintained by the Ministry of Interior. The information from the card is entered in the database, which tracks individual visitors to Egypt by passport number. When the visitor leaves the country, the data from his or her departure card is again entered in the Ministry database. The Ministry thus tracks the stays in Egypt of each individual visitor to the country.

This database provides the basis for widely available data on the number of foreign visitors, their origin, and their length of stay in Egypt. These data are published by CAPMAS, the Ministry of Tourism, the Central Bank, and other ministries. They are the basis for extrapolating the expenditure

data from the survey of inbound tourists to the entire foreign tourist population and for estimating expenditures per visitor-night by foreign tourists.

These data do not include information about Egyptians living abroad who return to the country to visit, unless they have given up Egyptian nationality and travel on the passport of their new home country. From the perspective of the TSA and of the economic impact of tourism, this is a significant gap, since they could constitute an important share of visitors to the country and foreign exchange expenditures in country. It also causes potentially significant distortion in the balance of payments data on foreign exchange receipts from travel, which is discussed below in section A.7 on data from the Central Bank.

These data are used to complete TSA Table 10, which covers a variety of non-monetary information. They are also used by the Ministry of Tourism, CAPMAS, the Central Bank, and an array of other organizations to track tourism flows for a wide range of purposes. Indeed, if other tourism data were as readily accessible as these, the understanding of tourism in the country would be much better even if the data themselves were not.

A.7 Central Bank

The Central Bank calculates and publishes data on the average expenditures on inbound tourism, foreign exchange transactions related to travel, and payments of foreign exchange for outbound travel.

Data on foreign exchange purchases for travel abroad are obtained from the banks within Egypt that handle the transactions. When an Egyptian goes to the bank to purchase foreign currency, s/he completes a form specifying the reason for the purchase. Travel is one of the reasons that can be marked on the form for the purchase. If the purchaser checks travel, s/he writes in a brief description of the purpose of the travel. Based on what is written in, the banks classify the purposes into categories defined by the IMF. When Egyptians traveling abroad use credit cards based on an Egyptian bank account denominated in LE, they apparently have to go to the bank to pay the bill, and at that time they complete a similar form explaining the nature of the purchase(s).¹⁸ The banks then submit data to the Central Bank including the total purchases of foreign exchange for travel purposes. The total of this value for all banks is reported in the balance of payments accounts as payment for purpose of travel.

The Central Bank has never compared the figures obtained this way with the data on outbound tourism collected in the HIES. In principle, the two numbers should be close or the same. In practice, of course they probably differ significantly; many reasons might be anticipated to suggest why either could exceed the other. Such a comparison would be interesting, however.

The balance of payments accounts figure for receipts from travel is based on the CAPMAS survey of inbound tourists. According to Central Bank staff, CAPMAS converts all of the data into US dollars and calculates subtotals of expenditure and visitor-nights by visitors from the major regions of the world. This relies on the visitor-night data provided by the Ministry of Interior, discussed in section A.6. CAPMAS turns these subtotals over to the Bank. Bank staff then calculate a weighted average of total expenditure per visitor-night for all foreign tourists combined, again relying on the Ministry of Interior on visitor-nights by people from different regions of the world.

In the years for which the inbound survey is conducted, this figure is reported by the Central Bank as the average expenditure per visitor per night. For the non-survey years, the Central Bank adjusts the

¹⁸ This information was provided by Ayman Ismail and Adil Abbas, both assistant managers of the Research, Development and Publishing Sector of the Central Bank of Egypt. It may require some additional clarification for eventual development of a TSA.

average expenditure figure to reflect changes in the \$US/LE exchange rate. Thus in 2002, a survey year, average expenditure per year was calculated to be \$115. In 2003, the LE dropped on the dollar. The expenditure was kept constant in LE, and converted back to dollars at the new exchange rate to obtain an average expenditure in dollars of \$75, reflecting the fact that it was cheaper for foreigners to come to Egypt once the LE was devalued.

In each year, survey or non-survey, the average expenditure per visitor-night is multiplied by the total number of visitor-nights to obtain the total expenditure of inbound tourists for that year. This is the value reported in the balance of payments tables as the receipts from travel.

Because Egyptians living abroad who return to Egypt on vacation are included neither in the CAPMAS survey nor in the Ministry of Interior data on visitor-nights, their expenditures in Egypt are not captured by any of these data. This is inconsistent both with the definition of residence in the national income and balance of payments accounts and with the WTO definition of tourism. In both sets of definitions, an Egyptian who lives and works abroad for more than a year is considered to be resident in the country where s/he works, even if the person still retains Egyptian citizenship. The balance of payments accounts are designed to capture transactions between residents and non-residents; the expenditures of Egyptians living abroad fall into that category. Therefore his or her vacation in Egypt should be considered tourism, s/he should be counted as an inbound tourist in the tourism data, and his or her expenditures on holiday in Egypt should be included in the balance of payments accounts.

The Central Bank also tracks sales of foreign currency in Egypt, either directly at the bank or through credit card purchases. All such sales by foreigners are reported by the banks to the Central Bank, which totals them. This total is consistently lower than the inbound tourism figures obtained from CAPMAS. The difference between the two figures is entered in the "other assets" section of the balance of payments accounts, on a row for "other" within "other assets", a row that includes discrepancies from several sources of which travel is only one. Therefore the published accounts data do not make it possible to see how much foreign exchange is sold in Egypt by visitors, although the information is known within the Bank.

The expenditures by Egyptians living abroad who return on vacation may entail sale of foreign exchange in Egyptian banks. They will not be reported by the banks to the Central Bank, however; the banks only report foreign exchange sales by foreigners. Consequently, the Central Bank cannot use bank reporting data as a basis for tracking foreign exchange brought into the country by non-resident Egyptians, nor can bank data provide a way to capture the information omitted from the inbound tourism survey.

A.8 Ministry of Tourism License Forms

The Ministry of Tourism licenses hotels, tour operators, and guides. The information provided at the time of initial licensing or license renewal offers an additional source of primary data about the supply side of the tourism industry. For example, they include information about the languages spoken by guides, which is published by the Ministry of Tourism in its tourism data book. Unfortunately, it was not possible to obtain copies of the licensing forms; this should be done in order to complete work on tourism data.

Annex B. TSA tables

Notes:

In the tables below, cells have been shaded if any of the Egyptian data sources provides data that has some bearing on the information required for that cell. The codes in each cell indicate which data source and where within that source the data may be found.

The fact that a cell is shaded does not mean all the requisite data are actually available. Rather, it simply alerts the reader that some relevant information is being collected, even if in fact they are inadequate to meet the needs of the TSA. For details on the information being collected and how it pertains to the TSA the reader should consult the appropriate portion of the text of the report.

Codes for data sources:

- | | |
|------|--|
| H | CAPMAS annual census of hotels, tourism villages, and floating hotels. The number after the letter H in the cell indicates the table within the questionnaire in which these data are collected. |
| HIES | CAPMAS Household Income and Expenditure Survey. The number after the letters HIES in the cell indicates the page within the questionnaire on which these data are collected. |
| F01 | 2000-2001 version of the CAPMAS survey of foreign visitors to Egypt. Unless otherwise indicated, data come from question 29 of the questionnaire. If another is indicated, it is the question number. |
| AC | Passports, Nationality, and Immigration Administration card completed at the airport by foreigners arriving in Egypt. |
| EC | Economic census and annual survey of establishments. Because we do not have translations of these questionnaires, we cannot specify precisely which forms or questions could be used to complete the TSA tables. We have, therefore, simply indicated "EC" where this data source should contribute to building the TSA. |
| HLF | CAPMAS household labor force survey, conducted quarterly with 21,000 respondents each quarter. All cells must be filled based on Tables 1 and 2, to capture both gender and employment status; therefore no numbers are provided. |
| GB | Government budgets. |

**Table 1 Inbound tourism consumption, by products and categories of visitors
(visitor final consumption expenditure in cash) (Net valuation)**

| Products | Same-day visitors (1.1) | Tourists (1.2) | Total visitors (1.3) = (1.1) + (1.2) |
|--|---|-------------------|---|
| A. Specific products | | | |
| A.1 Characteristic products (a) | | | |
| 1 – Accommodation services | X | | |
| 1.1 – Hotels and other lodging services (3) | X | F01 | F01 |
| 1.2 – Second homes services on own account or for free | X | X | X |
| 2 – Food and beverage serving services (3) | F01 | F01 | F01 |
| 3 – Passenger transport services (3) | F01 | F01 | F01 |
| 3.1 Interurban railway (3) | | | |
| 3.2 Road (3) | | | |
| 3.3 Water (3) | | | |
| 3.4 Air (3) | F01 | F01 | F01 |
| 3.5 Supporting services | | | |
| 3.6 Transport equipment rental | | | |
| 3.7 Maintenance and repair services | | | |
| 4 – Travel agency, tour operator and tourist guide services | | | |
| 4.1 Travel agency (1) | | | |
| 4.2 Tour operator (2) | | | |
| 4.3 Tourist information and tourist guide | | | |
| 5 – Cultural services (3) | F01 | F01 | F01 |
| 5.1 Performing arts | | | |
| 5.2 Museum and other cultural services | F01 | F01 | F01 |
| 6 – Recreation and other entertainment services (3) | F01 | F01 | F01 |
| 6.1 Sports and recreational sport services | | | |
| 6.2 Other amusement and recreational services | | | |
| 7 – Miscellaneous tourism services | | | |
| 7.1 Financial and insurance services | | | |
| 7.2 Other good rental services | | | |
| 7.3 Other tourism services | F01 | F01 | F01 |
| A.2 Connected products | F01 | F01 | F01 |
| distribution margins | | | |
| goods (4) | | | |
| Services | | | |
| B. Non specific products | | | |
| distribution margins | | | |
| goods (4) | | | |
| services | | | |
| TOTAL | | | |
| number of trips | | | |
| number of overnights | | | |
| X does not apply | (a) Even if they are called “products”, no goods are included for the time being. Two main reasons led to that decision: | | |
| (1) Corresponds to the margins of the travel agencies | <p>- the importance of the existing differences (both in level and structure) between the types of goods acquired by visitors according to the country and place visited;</p> <p>- the existing limitations of the available sources of statistical information. Nevertheless, goods are not totally banned from the analysis, as retail trade services (specialized and non specialized) associated with the sale of goods to visitors are included within the list.</p> <p>This is due to the fact that the associated productive activity is an activity which is in contact with the visitor and thus, given certain circumstances, can be viewed as a tourism activity. Moreover, the list of products included in each of the 7 groups under consideration is shown in Annex II; the explanatory notes for each of them are also included in Annex I, in order that they may be clearly identified.</p> | | |
| (2) Corresponds to the margins of the tour operators | | | |
| (3) The value is net of the amounts paid to travel agencies and tour operators | | | |
| (4) The value is net of distribution margins | | | |

**Table 2 Domestic tourism consumption, by products and ad hoc sets of resident visitors
(visitor final consumption expenditure in cash) (Net valuation)**

| Products | Resident visitors traveling only within the country of reference | | | Resident visitors traveling to a different country(*) | | | All resident visitors (**) | | |
|--|--|----------------|--------------------------------------|---|----------------|--------------------------------------|---|--------------------------------|--------------------------------------|
| | Same-day visitors (2.1) | Tourists (2.2) | Total visitors (2.3) = (2.1) + (2.2) | Same-day visitors (2.4) | Tourists (2.5) | Total visitors (2.6) = (2.4) + (2.5) | Same-day visitors (2.7) = (2.1) + (2.4) | Tourists (2.8) = (2.2) + (2.5) | Total visitors (2.9) = (2.3) + (2.6) |
| A. Specific products | | | | | | | | | |
| A.1 Characteristic products (a) | | | | | | | | | |
| 1 – Accommodation services | X | | | X | | | X | | |
| 1.1 – Hotels and other lodging services (3) | X | HIES49 | HIES49 | X | | | X | | HIES49 |
| 1.2 – Second homes services on own account or for free | X | X | X | X | X | X | X | X | X |
| 2 – Food and beverage serving services (3) | | | | | | | | | |
| 3 – Passenger transport services (3) | | | | | | | | | |
| 3.1 Interurban railway (3) | | | | | | | | | |
| 3.2 Road (3) | | | HIES45,46 | | | | | | HIES45,46 |
| 3.3 Water (3) | | | HIES46 | | | | | | HIES46 |
| 3.4 Air (3) | | | HIES46 | | | | | | HIES46 |
| 3.5 Supporting services | | | | | | | | | |
| 3.6 Transport equipment rental | | | | | | | | | |
| 3.7 Maintenance and repair services | | | | | | | | | |
| 4 – Travel agency, tour operator and tourist guide services | | | | | | | | | |
| 4.1 Travel agency (1) | | | | | | | | | |
| 4.2 Tour operator (2) | | | | | | | | | |
| 4.3 Tourist information and tourist guide | | | | | | | | | |
| 5 – Cultural services (3) | | | | | | | | | |
| 5.1 Performing arts | | | | | | | | | |
| 5.2 Museum and other cultural services | | | | | | | | | |
| 6 – Recreation and other entertainment services (3) | | HIES49 | HIES49 | | | | | | HIES49 |
| 6.1 Sports and recreational sport services | | | | | | | | | |
| 6.2 Other amusement and recreational services | | | | | | | | | |
| 7 – Miscellaneous tourism services | | HIES49 | HIES49 | | | | | | HIES49 |
| 7.1 Financial and insurance services | | | | | | | | | |
| 7.2 Other good rental services | | | | | | | | | |
| 7.3 Other tourism services | | | | | | | | | |
| A.2 Connected products distribution margins goods (4) services | | | HIES46,48 | | | | | | |
| B. Non specific products distribution margins goods (4) services | | | | | | | | | |
| TOTAL | | | | | | | | | |
| number of trips | | | | | | | | | |
| number of overnights | | | | | | | | | |

X does not apply

(a) See note under Table 1

(*) This set of visitors refers to those resident visitors which trip will take them outside the economic territory of the country of reference. These columns will include their consumption expenditure before departure or after their return.

(**) Due to the fact that some expenditures cannot be associated specifically to any of these categories of visitors (for instance, single purpose consumer durables bought or purchased outside the context of a trip), the estimation of domestic tourism consumption (which corresponds to the last column of the table) will require some specific adjustments. Visitor final consumption expenditure in cash for all resident visitors, is not strictly the sum of this concept for each category of visitors.

(1) Corresponds to the margins of the travel agencies

(2) Corresponds to the margins of the tour operators

(3) The value is net of the amounts paid to travel agencies and tour operators

(4) The value is net of distribution margins

Table 3. Outbound tourism consumption, by products and categories of visitors (visitor final consumption expenditure in cash) (Net valuation)

| | Same-day visitors (3.1) | Tourists (3.2) | Total visitors (3.3) = (3.1) + (3.2) |
|--|-------------------------------|-------------------|---|
| Products | | | |
| A. Specific products | | | |
| A.1 Characteristic products (a) | | HIES53 | HIES53 |
| 1 – Accommodation services | X | | |
| 1.1 – Hotels and other lodging services (3) | X | | |
| 1.2 – Second homes services on own account or for free | X | X | X |
| 2 – Food and beverage serving services (3) | | | |
| 3 – Passenger transport services (3) | | | |
| 3.1 Interurban railway (3) | | | |
| 3.2 Road (3) | | | HIES45,46 |
| 3.3 Water (3) | | | |
| 3.4 Air (3) | | | |
| 3.5 Supporting services | | | |
| 3.6 Transport equipment rental | | | |
| 3.7 Maintenance and repair services | | | |
| 4 – Travel agency, tour operator and tourist guide services | | | |
| 4.1 Travel agency (1) | | | |
| 4.2 Tour operator (2) | | | |
| 4.3 Tourist information and tourist guide | | | |
| 5 – Cultural services (3) | | | |
| 5.1 Performing arts | | | |
| 5.2 Museum and other cultural services | | | |
| 6 – Recreation and other entertainment services (3) | | | |
| 6.1 Sports and recreational sport services | | | |
| 6.2 Other amusement and recreational services | | | |
| 7 – Miscellaneous tourism services | | HIES53 | HIES53 |
| 7.1 Financial and insurance services | | | |
| 7.2 Other good rental services | | | |
| 7.3 Other tourism services | | | |
| A.2 Connected products | | | HIES46,48 |
| distribution margins | | | |
| goods (4) | | | |
| Services | | | |
| B. Non specific products | | | |
| distribution margins | | | |
| goods (4) | | | |
| services | | | |
| TOTAL | | | |
| number of trips | | | |
| number of overnights | | | |
| X does not apply | | | |
| (a) See note under Table 1 | | | |
| (1) Corresponds to the margins of the travel agencies | | | |
| (2) Corresponds to the margins of the tour operators | | | |
| (3) The value is net of the amounts paid to travel agencies and tour operators | | | |
| (4) The value is net of distribution margins | | | |

Table 4. Internal tourism consumption, by products and types of tourism (Net valuation)

| | Visitors final consumption expenditure in cash | | | Other components of visitors consumption (4.4)*** | Internal tourism consumption (in cash and in kind) (4.5) = (4.3) + (4.4) |
|--|--|--------------------------------------|--|---|--|
| | Inbound tourism consumption (4.1)* | Domestic tourism consumption (4.2)** | Internal tourism consumption in cash (4.1) + (4.2) = (4.3) | | |
| Products | | | | | |
| A. Specific products | | | | | |
| A.1 Characteristic products (a) | | | | | HIES49 |
| 1 – Accommodation services | | | | | |
| 1.1 – Hotels and other lodging services (3) | | HIES49 | HIES49 | | HIES49 |
| 1.2 – Second homes services on own account or for free | X | X | X | | HIES1 |
| 2 – Food and beverage serving services (3) | | | | | |
| 3 – Passenger transport services (3) | | | | | |
| 3.1 Interurban railway (3) | | | | | |
| 3.2 Road (3) | | HIES45,46 | HIES45,46 | | HIES45,46 |
| 3.3 Water (3) | | HIES46 | HIES46 | | HIES46 |
| 3.4 Air (3) | | HIES46 | HIES46 | | HIES46 |
| 3.5 Supporting services | | | | | |
| 3.6 Transport equipment rental | | | | | |
| 3.7 Maintenance and repair services | | | | | |
| 4 – Travel agency, tour operator and tourist guide services | | | | | |
| 4.1 Travel agency (1) | | | | | |
| 4.2 Tour operator (2) | | | | | |
| 4.3 Tourist information and tourist guide | | | | | |
| 5 – Cultural services (3) | | | | | |
| 5.1 Performing arts | | | | | |
| 5.2 Museum and other cultural services | | | | | |
| 6 – Recreation and other entertainment services (3) | | HIES49 | HIES49 | | HIES49 |
| 6.1 Sports and recreational sport services | | | | | |
| 6.2 Other amusement and recreational services | | | | | |
| 7 – Miscellaneous tourism services | | HIES49 | HIES49 | | HIES49 |
| 7.1 Financial and insurance services | | | | | |
| 7.2 Other good rental services | | | | | |
| 7.3 Other tourism services | | | | | |
| A.2 Connected products | | HIES46,48 | HIES46,48 | | HIES46,48 |
| distribution margins | | | | | |
| Services | | | | | |
| B. Non specific products | | | | | |
| distribution margins | | | | | |
| services | | | | | |
| Value of domestically produced goods net of distribution margins | | | | | |
| Value of imported goods net of distribution margins | | | | | |
| | | | | | |
| TOTAL | | | | | |

X does not apply

(a) See note under Table 1

(*) Corresponds to 1.3 in table 1 (**) Corresponds to 2.9 in table 2 (***) These components (referred to as visitor final consumption expenditure in kind, tourism social transfer in kind and tourism business expenses) are recorded separately as these components are not easily attributable by types of tourism

(1) Corresponds to the margins of the travel agencies (2) Corresponds to the margins of the tour operators

(3) The value is net of the amounts paid to travel agencies and tour operators

Table 5. Production accounts of tourism industries and other industries (Net valuation)

| Products: | TOURISM INDUSTRIES | | | | | | | | | | | | TOTAL tourism Industries (sum of 5.1 to 5.12 = 5.13) | Tourism connected Industries 5.14 | Non specific Industries 5.15 | TOTAL output of domestic producers (at basic prices) 5.13 + 5.14 + 5.15 = 5.16 |
|---|------------------------|-------------------------------------|-----------------------------|---------------------------------|------------------------------|-------------------------------|-----------------------------|---|--|----------------------------------|------------------------|---|--|-----------------------------------|--|--|
| | 5.1 Hotels and similar | 5.2 Second home ownership (imputed) | 5.3 Restaurants and similar | 5.4 Railway passenger transport | 5.5 Road passenger transport | 5.6 Water passenger transport | 5.7 Air passenger transport | 5.8 Passenger transport supporting services | 5.9 Passenger transport equipment rental | 5.10 Travel agencies and similar | 5.11 Cultural services | 5.12 Sporting and other recreational services | | | | |
| A. Specific products | | | | | | | | | | | | | | | Output of tourism characteristic or connected products by industries whose main activity is in non-specific products | |
| A.1 Characteristic products (a) | | | | | | | | | | | | | | | | |
| 1 – Accommodation services | | | | | | | | | | | | | | | | |
| 1.1 – Hotels and other lodging services (3) | H9,EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H9, EC | EC | | H9, EC |
| 1.2 – Second homes services on own account or for free | X | | X | X | X | X | X | X | X | X | X | X | | X | | |
| 2 – Food and beverage serving services (3) | H9,EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H9, EC | EC | | H9, EC |
| 3 – Passenger transport services (3) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 3.1 Interurban railway (3) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 3.2 Road (3) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 3.3 Water (3) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 3.4 Air (3) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 3.5 Supporting services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 3.6 Transport equipment rental | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 3.7 Maintenance and repair services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 4 – Travel agency, tour operator and tourist guide services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 4.1 Travel agency (1) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 4.2 Tour operator (2) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 4.3 Tourist information and tourist guide | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 5 – Cultural services (3) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 5.1 Performing arts | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 5.2 Museum and other cultural services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 6 – Recreation and other entertainment services (3) | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 6.1 Sports and recreational sport services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 6.2 Other amusement and recreational services | H9 | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H9, EC | EC | | H9, EC |
| 7 – Miscellaneous tourism services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |

| | | | | | | | | | | | | | | | | |
|---|----------|---|---|----|----|----|----|----|----|----|----|----|----------|----|---------------------------|----------|
| 7.1 Financial and insurance services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 7.2 Other good rental services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| 7.3 Other tourism services | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| A.2 Connected products | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | EC |
| distribution margins | | X | | | | | | | | | | | | | | |
| services | | X | | | | | | | | | | | | | | |
| B. Non specific products | | X | Output of products not associated with tourism, by tourism characteristic or connected industries | | | | | | | | | | | | Output by rest of economy | |
| distribution margins | | X | | | | | | | | | | | | | | |
| services | | X | | | | | | | | | | | | | | |
| Value of domestic produced goods net of distribution margins | | X | | | | | | | | | | | | | | |
| Value of imported goods net of distribution margins | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| TOTAL output (at basic prices) | | | | | | | | | | | | | | | | |
| Consumption of inputs: | | | | | | | | | | | | | | | | |
| 1. Agriculture, forestry and fishery products | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| 2. Ores and minerals | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| 3. Electricity, gas and water | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| 4. Manufacturing | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| 5. Construction work and construction | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| 6. Trade services, restaurants and hotel services | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| 7. Transport, storage and communication services | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| 8. Business services | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| 9. Community, social and personal services | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | X | X | H8, EC |
| Total intermediate consumption (at purchasers price) | H8 | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H8, EC | | | H8, EC |
| Total gross value added of activities (at basic prices) (VATI) | | | | | | | | | | | | | | | | |
| Compensation of employees | H6,7, EC | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H6,7, EC | | | H6,7, EC |
| Other taxes less subsidies on production | | | | | | | | | | | | | | | | |
| Gross Mixed income | | | | | | | | | | | | | | | | |
| Gross Operating surplus | | | | | | | | | | | | | | | | |
| X - does not apply (a) See note under Table 1 (1) Corresponds to the margins of the travel agencies (2) Corresponds to the margins of the tour operators (3) The value is net of the amounts paid to travel agencies and tour operators | | | | | | | | | | | | | | | | |

Table 6 Domestic supply and internal tourism consumption, by products (Net valuation)

| Products | TOURISM INDUSTRIES – from Table 5 (output) and Table 4 (tourism share in consumption) | | | | | | | | TOTAL tourism Industries – columns Sum of 6.1 to 6.12 = 6.13 | | Tourism connected Industries 6.14 | | Non specific Industries 6.15 | | Total output of domestic producers (at basic prices) Sum of 6.1 to 6.15 = 6.16 | Imports 6.17 | Taxes less subsidies on domestic output and imports 6.18 | Domestic supply (at purchasers price) 6.16 + 6.17 + 6.18 = 6.19 | Internal tourism consumption (total from Table 4) 6.20 | Tourism ratio on supply 6.20 ÷ 6.19 |
|---|---|-----------------|---------------------------------------|---------------|--------|---------------|---|---------------|--|-----------------|-----------------------------------|-----------------|------------------------------|-----------------|--|--------------|--|---|--|-------------------------------------|
| | 6.1- Hotels and similar | | 6.2 - Second home ownership (imputed) | | ... | | 6.12 - Sporting and other recreational services | | | | | | | | | | | | | |
| | output | tourism share | output | tourism share | output | tourism share | output | tourism share | output | tourism share | Output From 5.14 | tourism share | Output From 5.15 | tourism share | | | | | | |
| A. Specific products | | | | | | | | | | | | | | | | | | | | |
| A.1 Characteristic products (a) | | | | | | | | | | | | | | | | | | | | |
| 1 – Accommodation services | | | | | | | | | | | | | | | | | | | | |
| 1.1 – Hotels and other lodging services (3) | H9,EC | H9,F01, HIES,EC | X | X | EC | | | EC,F0I, HIES | | H9,F01, HIES,EC | | H9,F01, HIES,EC | | H9,F01, HIES,EC | H9,EC | | | H9,EC | H9,F01, HIES,EC | |
| 1.2 – Second homes services on own account or for free | X | X | HIES | | X | X | X | X | | | X | X | X | X | | X | X | | | |
| 2 – Food and beverage serving services (3) | H9,EC | H9,F01, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | H9,F01, HIES,EC | EC | H9,F01, HIES,EC | EC | H9,F01, HIES,EC | H9,EC | | | H9,EC | H9,F01, HIES,EC | |
| 3 – Passenger transport services (3) | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 3.1 Interurban railway (3) | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 3.2 Road (3) | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 3.3 Water (3) | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 3.4 Air (3) | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 3.5 Supporting services | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 3.6 Transport equipment rental | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 3.7 Maintenance and repair services | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 4 – Travel agency, tour operator and tourist guide services | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 4.1 Travel agency (1) | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |
| 4.2 Tour operator (2) | EC | F0I, HIES,EC | X | X | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | EC,F0I, HIES | EC | | | EC | EC,F0I, HIES | |

| | | | | | | | | | | | | | | | | | | | | |
|--|----|--------------|---|---|----|--------------|----|--------------|----|--------------|----|--------------|----|--------------|----|--|---|----|--------------|---|
| 4.3 Tourist information and tourist guide | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 5 – Cultural services (3) | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 5.1 Performing arts | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 5.2 Museum and other cultural services | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 6 – Recreation and other entertainment services (3) | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 6.1 Sports and recreational sport services | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 6.2 Other amusement and recreational services | H9 | H9 | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | H9 | | | EC | EC,F01, HIES | |
| 7 – Miscellaneous tourism services | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 7.1 Financial and insurance services | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 7.2 Other good rental services | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| 7.3 Other tourism services | EC | F01, HIES,EC | X | X | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | | | EC | EC,F01, HIES | |
| A.2 Connected products | | | X | X | | | | | | | | | | | | | | | | |
| distribution margins | | | X | X | | | | | | | | | | | | | | | | |
| Services | | | X | X | | | | | | | | | | | | | | | | |
| B. Non specific products | | | X | X | | | | | | | | | | | | | | | | |
| distribution margins | | | X | X | | | | | | | | | | | | | | | | |
| services | | | X | X | | | | | | | | | | | | | | | | |
| Value of domestically produced goods net of distribution margins | | | X | X | | | | | | | | | | | | | | X | X | |
| Value of imported goods net of distribution margins | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | | X | X | X | X |
| TOTAL output (at basic prices) | | | | | | | | | | | | | | | | | | | | |
| Consumption of Inputs: | | | | | | | | | | | | | | | | | | | | |

| | | | | | | | | | | | | | | | | | | | | |
|--|--------------|------------------------|--|--|---------|-------------------|---------|-------------------|---------|---------------------|---|---|---|---|---|--|--|-------------------------|-------------------|-------------------------|
| 1. Agriculture, forestry and fishery products | H8,EC | H8-9,EC,F01, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | X | X | X | X | X | | | H8,EC | H8-9,EC,F01, HIES | H8-9,EC,F01, HIES |
| 2. Ores and minerals | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | X | X | X | X | X | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| 3. Electricity, gas and water | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | X | X | X | X | X | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| 4. Manufacturing | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | X | X | X | X | X | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| 5. Construction work and construction | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9S | X | X | X | X | X | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| 6. Trade services, restaurants and hotel services | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | X | X | X | X | X | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| 7. Transport, storage and communication services | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | X | X | X | X | X | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| 8. Business services | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | X | X | X | X | X | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| 9. Community, social and personal services | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | X | X | X | X | X | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| Total intermediate consumption (at purchasers price) | H8,EC | H8,EC, HIES | | | EC | EC,F01, HIES | EC | EC,F01, HIES | EC | EC,F01, HIES, H8-9 | | | | | | | | H8,EC | H8,EC, HIES | H8,EC, HIES |
| Total gross value added of activities (at basic prices) | | | | | | | | | | | | | | | | | | | | |
| Compensation of employees | H6,7,EC, HLS | H6,7,EC, HLS,F01, HIES | | | EC, HLS | EC,HLS, F01, HIES | EC, HLS | EC,HLS, F01, HIES | EC, HLS | EC,HLS, F01, HIES | | | | | | | | H6,7,9,EC,HLS, F01,HIES | H6,7,9, EC,HLS | H6,7,9,EC,HLS, F01,HIES |
| Other taxes less subsidies on production | | | | | | | | | | | | | | | | | | | | |
| Gross Mixed income | | | | | | | | | | | | | | | | | | | | |
| Gross Operating surplus | | | | | | | | | | | | | | | | | | | | |
| X does not apply (a) See note under Table 1 Means that all tourism industries of the proposed list have to be considered one by one in the enumeration The imports referred here are exclusively those which are purchased within the country of reference. (1) Corresponds to the margins of the travel agencies (2) Corresponds to the margins of the tour operators (3) The value is net of the amounts paid to travel agencies and tour operators | | | | | | | | | | | | | | | | | | | | |

Table 7 Employment in the tourism industries

| Tourism industries | Number of establishments | Number of jobs | | | Status in employment | | | | | | Number of employed persons | | |
|---|--------------------------|--|--------|-------|----------------------|---------|---------|---------|---------|---------|----------------------------|---------|---------|
| | | total | | | employees | | | other | | | total | | |
| | | Male | Female | Total | Male | Female | Total | Male | Female | Total | Male | Female | Total |
| 1 – Hotels and similar | | H5 | H5 | H5 | H5, HLF | H5, HLF | H5, HLF | H5, HLF | H5, HLF | H5, HLF | H5, HLF | H5, HLF | H5, HLF |
| 2 – Second home ownership (imputed) | | X | X | X | X | X | X | X | X | X | X | X | X |
| 3 – Restaurants and similar | | Data on the number of jobs should be available from the employer labor survey. It was not possible to review that survey in the course of this work. | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 4 – Railways passenger transport | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 5 – Road passenger transport | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 6 – Water passenger transport | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 7 – Air passenger transport | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 8 – Passenger transport supporting services | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 9 – Passenger transport equipment rental | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 10 – Travel agencies and similar | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 11 – Cultural services | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| 12 – Sporting and other recreational services | | | | | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF | HLF |
| | | | | | | | | | | | | | |
| TOTAL | | | | | | | | | | | | | |
| X does not apply | | | | | | | | | | | | | |

Table 8 Tourism gross fixed capital formation of tourism industries and other industries

| Capital goods | TOURISM INDUSTRIES | | | | | | | | | | | | Total tourism industries | Other industries | | | Total tourism gross fixed capital formation of tourism industries and others |
|---|------------------------|-------------------------------------|-----------------------------|---------------------------------|------------------------------|-------------------------------|-----------------------------|---|--|----------------------------------|------------------------|---|--------------------------|-----------------------|--------|-------|--|
| | 1 - Hotels and similar | 2 - Second home ownership (imputed) | 3 - Restaurants and similar | 4 - Railway passenger transport | 5 - Road passenger transport | 6 - Water passenger transport | 7 - Air passenger transport | 8 - Passenger transport supporting services | 9 - Passenger transport equipment rental | 10 - Travel agencies and similar | 11 - Cultural services | 12 - Sporting and other recreational services | | Public Administration | Others | Total | |
| | | | | | | | | | | | | | | | | | |
| A. Produced non-financial assets | | | | | | | | | | | | | | | | | |
| A1. Tangible fixed assets | H10, EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H10, EC | | | | H10, EC |
| 1. Tourism accommodation | EC | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | EC |
| 1.1. Hotel and other collective accommodation | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | EC |
| 1.2. Dwellings for tourism purposes | EC | | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | EC |
| 2. Other buildings and structures | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | EC |
| 2.1. Restaurants and similar buildings | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | EC |
| 2.2. Construction or infrastructure for passenger transport by road, rail, water, air | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | (1) | | | EC |
| 2.3. Buildings for cultural services and similar | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | EC |
| 2.4. Constructions for sport, recreation and entertainment | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | EC |
| 2.5. Other constructions and structures | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | (1) | (1) | | EC |
| 3. Passenger transport equipment | H10, EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H10 | | | | H10 |
| 3.1. Road and rail | EC | X | EC | EC | HIES45 | EC | EC | EC | EC | EC | EC | EC | HIES45 | | | | HIES45 |
| 3.2. Water | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | |

| | | | | | | | | | | | | | | | | | |
|--|---|---|----|----|----|----|----|----|----|----|----|----|-----|-----|-----|--|-----|
| 3.3. Air | EC | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | | | | EC |
| 4. Machinery and equipment | H10 | X | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC | H10 | (1) | (1) | | H10 |
| A2. Intangible fixed assets | | X | | | | | | | | | | | | (1) | (1) | | |
| B. Improvement of land used for tourism purposes | | | | | | | | | | | | | | | | | |
| TOTAL | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| Memo: | | | | | | | | | | | | | | | | | |
| C. Non produced non-financial assets | | X | | | | | | | | | | | | | | | |
| 1. Tangible non produced assets | | X | | | | | | | | | | | | | | | |
| 2. Intangible non produced assets | | X | | | | | | | | | | | | | | | |
| TOTAL | | X | | | | | | | | | | | | | | | |
| X does not apply | (1) Only that which is for tourism purposes | | | | | | | | | | | | | | | | |

Table 9 Tourism collective consumption, by functions and levels of government

| | | | | | Memo (*) |
|--|----------------------|------------------------------|-------------------|--|--|
| Function | National level (9.1) | Regional (state) level (9.2) | Local level (9.3) | Total tourism collective consumption (9.4) = (9.1) + (9.2) + (9.3) | Intermediate consumption by the tourism industries |
| Tourism promotion | GB | GB | GB | GB | |
| General planning and coordination related to tourism affairs | GB | GB | GB | GB | X |
| Generation of statistics and of basic information on tourism | GB | GB | GB | GB | X |
| Administration of information bureaus | GB | GB | GB | GB | |
| Control and regulation of establishments in contact with visitors | GB | GB | GB | GB | X |
| Specific control to resident and non resident visitors | GB | GB | GB | GB | X |
| Special civil defence services related with the protection of visitors | GB | GB | GB | GB | |
| Other services | GB | GB | GB | GB | |
| TOTAL | GB | GB | GB | GB | |
| X does not apply | | | | | |
| (*) This column reflects the expenditure by the tourism industries in tourism promotion or other services related to the functions described, when relevant. | | | | | |

Table 10. Non-monetary indicators

| | Inbound tourism (*) | | | Domestic tourism | | | Outbound tourism | | | |
|---|-----------------------------------|----------|----------------|-------------------|-------------------------------|----------------------|-------------------|----------|----------------|-------|
| | Same-day visitors | Tourists | Total visitors | Same-day visitors | Tourists | Total visitors | Same-day visitors | Tourists | Total visitors | |
| Number of trips (*) | AC | AC | AC | | | | AC | AC | AC | |
| Number of overnights | AC | AC | AC | | | | AC | AC | AC | |
| (*) In the case of inbound tourism, the variable would be "arrivals" | | | | | | | | | | |
| b. Inbound tourism: Number of arrivals and overnights by means of transport | | | | | | | | | | |
| | Number of arrivals | | | | | Number of overnights | | | | |
| 1.Air | AC | | | | | AC | | | | |
| 1.1 Scheduled flights | AC | | | | | AC | | | | |
| 1.2 Non scheduled flights | AC | | | | | AC | | | | |
| 1.3 Other services | AC | | | | | AC | | | | |
| 2. Waterway | AC | | | | | AC | | | | |
| 2.1 Passenger lines and ferries | AC | | | | | AC | | | | |
| 2.2 Cruise | AC | | | | | AC | | | | |
| 2.3 Other | AC | | | | | AC | | | | |
| 3. Land | AC | | | | | AC | | | | |
| 3.1 Railway | AC | | | | | AC | | | | |
| 3.2 Motor coach or bus and other public road transportation | AC | | | | | AC | | | | |
| 3.3 Private vehicles | AC | | | | | AC | | | | |
| 3.4 Vehicle rental | AC | | | | | AC | | | | |
| 3.5 Other means of land transport | AC | | | | | AC | | | | |
| TOTAL | AC | | | | | AC | | | | |
| c. Number of establishments and capacity by forms of accommodation | | | | | | | | | | |
| | Collective tourism establishments | | | | Private tourism accommodation | | | | | |
| | Hotels and similar | | Others | | Second Homes | | | Others | | |
| number of establishments | H | | H | | | | | | | |
| capacity (rooms) | H1 | | H1 | | | | | | | |
| capacity (beds) | H1 | | H1 | | | | | | | |
| capacity utilization (rooms) | | | | | | | | | | |
| capacity utilization (beds) | H4 | | H4 | | | | | | | |
| d. Number of establishments in tourism characteristic and tourism connected activities classified according to number of employed persons | | | | | | | | | | |
| | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100-249 | 250-499 | 500-999 | > 1000 | TOTAL |
| Tourism Characteristic activities | | | | | | | | | | |
| 1 – Hotels and similar | H6,7 | H6,7 | H6,7 | H6,7 | H6,7 | H6,7 | H6,7 | H6,7 | H6,7 | H6,7 |
| 2 – Second home ownership (imputed) | X | X | X | X | X | X | X | X | X | X |
| 3 – Restaurants and similar | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 4 – Railways passenger transport | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 5 – Road passenger transport | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 6 – Water passenger transport | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 7 – Air passenger transport | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 8 – Passenger transport supporting services | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 9 – Passenger transport equipment rental | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 10 – Travel agencies and similar | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 11 – Cultural services | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| 12 – Sporting and other recreational services | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| Tourism Connected activities | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |
| TOTAL | EC | EC | EC | EC | EC | EC | EC | EC | EC | EC |

Annex C. Some Published Data on Tourism

C.1 Bulletins of Tourism and Hotels Issued by CAPMAS

According to the English version of the CAPMAS website, they publish the following bulletins related to tourism:

Hotels' activity assets – provides data based on the annual hotel survey

Monthly and Biannual Bulletins of Tourism – provide data on the number and origin of tourists and number of tourist nights. This is based on information that they obtain from the

Several other CAPMAS bulletins may also have some disaggregation of tourism activities:

Serial No. 89 – employment, wages, and working hours

Serial No. 94 – government and public sector employees

Serial No. 96 – labor sample survey annual publication

C.2 Annual Statistical Yearbook – English and Arabic

The annual Statistical Yearbook includes a section on tourism. It includes the following tables:

| | |
|------------|--|
| Table 11-1 | Number of inbound tourists by nationality. National data are aggregated into four groups - Arabs, Europeans, Americans, and others – although the underlying information must be by country. The 2004 Yearbook provides data for 1995 to 2003; presumably earlier data exist. The source is given as CAPMAS. |
| Table 11-2 | Number of nights spent in Egypt by inbound tourists and by nationality. The data are aggregated into the same categories as Table 11-1 and provide the same time series, with the source again given as CAPMAS. |
| Table 11-3 | Number of inbound tourists disaggregated according to arrival by air, sea, and land. Same aggregation, time series, and source as the other tables. |
| Table 11-4 | Hotel capacity (rooms and beds), for hotels, tourist villages, and floating hotels (cruise boats), for 1995 to 2002. Source given is the Ministry of Tourism. |
| Table 11-5 | Average occupancy rates for hotel rooms, by governorate, for Cairo, South Sinai, Luxor, Red Sea, Aswan, Alexandria, and Giza, 1995-2003. Source given is the Ministry of Tourism. |

The data in tables 1 through 3 could be obtained from the arrival cards completed by all non-Egyptians when they enter the country. The data in tables 4 and 5 may be found in the CAPMAS Census of Hotels; however the document gives the source as the Ministry of Tourism.

“Statistics of Hotels and Pensions in Public Business and Private Sector in the Arab Republic of Egypt, 2002/2003.” Reference No. 70-12314/2003, September 2004.

This is the CAPMAS bulletin presenting the results of the annual census of hotels. It is published only in Arabic. Due to its length, it was not realistic to obtain translations of the table headings in order to summarize the data published. However, since we have been able to review the questionnaire underlying the report, we already know what primary data exist and could be used for the TSA.

C.3 Ministry of Tourism

In 2002 and 2003 the Ministry of Tourism published “Egypt 2002 (or 3): Tourism in Figures,” a summary of tourism data which they received from CAPMAS, the Central Bank, and the Passports, Nationality, and Immigration Administration. The 124-page report includes statistics in the following areas:

| | |
|-----------------|--|
| Tourist Traffic | Number of international visitors and visitor-nights, by country of origin, month of visit, port of entry, and mode of transport. These data are disaggregated in various ways; by region of origin, by most important sending countries, by month of visit, and so on. The tables do not indicate specific sources, but all of this information can be obtained from the arrival cards completed at the airport. |
| Lodging | Hotel capacity in units (hotels), rooms, and beds, by type of hotel (regular, tourist village, and floating hotels), class (one-star through five-star). Origin of those staying in hotels, disaggregated by type of hotel, class, region or governorate, and month. Hotel occupancy rates by month, region or governorate, and class. |
| Services | Number of travel agencies providing general tourism services, ticketing and reservations, and transportation, 1990-2002. Number of tourists served, tourist nights, and value of services for travel agencies providing general tourism services, 1990-2002. Number of tourist guides 1990-2002, languages spoken by tourist guides by tourism area. Number of public tourism establishments (restaurants, cafes, theaters) by class (one star through five stars) by governorate. |
| Air Transport | Number of scheduled and non-scheduled Egypt Air international and domestic arrivals and departures at each airport, number of passengers in each category. (It is not explained what non-scheduled Egypt Air arrivals or departures are.) |
| Egyptian travel | Arrivals and departures by Egyptians each month at main points of entry. |
| Revenues | Tourism receipts 1994-2002, total and per visitor, in \$US. These data are from the Central Bank. It is not clear whether they refer to foreign exchange or all receipts. |

With the exception of the revenue data, the report does not indicate anything about the sources of the data.

C.4 Central Bank of Egypt

The Central Bank tracks the foreign exchange flows from travel and estimates the average daily expenditure of inbound tourists. These data are published in their annual *Economic Review*, in the chapter on tourism.

Appendix D: Reference Works on Tourism Satellite Accounts and Economic Analysis

American Chamber of Commerce in Egypt, August 2002. *The Tourism Sector in Egypt*.

<http://www.amcham.org.eg/BSAC/StudiesSeries/ReportsStudies.asp> Members: LE 75, Non-members: LE 150, Int'l Price: \$ 100, Students: LE 75

WTO Papers on Tourism Statistics. This list of publications is available at: <http://www.world-tourism.org/cgi-bin/infoshop.storefront/EN>

| | |
|--|----------------------------|
| Tourism Satellite Accounts - Professional Set The most complete set on the developments of the TSA. Designed for those who want to have the complete overview over definitions, concepts, state of the art of the academic discussion and future developments. | 135.00 €/ / 178.33 US\$ |
| Tourism Satellite Accounts - Basic Set This package is designed for those interested in designing and implementing a Tourism Satellite Account, the global standard to measure the tourism industry's impact on global and national economies. | 60.00 €/ / 79.26 US\$ |
| Tourism Satellite Account: Recommended Methodological Framework Aiming at preparing a sound basis for the international assessment of the economic impact of tourism. (Also on the web at: http://unstats.un.org/unsd/publication/SeriesF/SeriesF_80E.pdf) | 27.00 €/ / 35.67 US\$ |
| The Tourism Satellite Account as an Ongoing Process: Past, Present and Future Developments Describes the steps taken to reach agreement on the TSA. | 33.00 €/ / 43.59 US\$ |
| Enzo Paci Papers on Measuring the Economic Significance of Tourism Vol. 2 This second Volume of the "Enzo Paci Papers on Measuring the Economic Significance of Tourism" continues to serve as a platform for familiarizing statisticians and economic analysts interested in tourism with WTO's Tourism Satellite Account Project. | 33.00 €/ / 43.59 US\$ |
| Enzo Paci Papers on Measuring the Economic Significance of Tourism Vol. 1 This new periodical has been designed to serve as a platform for familiarizing statisticians and economic analysts interested in tourism with WTO's Tourism Satellite Account Project. | 33.00 €/ / 43.59 US\$ |
| Measuring Total Tourism Demand - General Guidelines Vol. 1 Volume 1 focuses on tourism aspects from the demand perspective. | 27.00 €/ / 35.67 US\$ |
| Measuring Tourism Supply - General Guidelines Vol. 2 Volume 2 focuses on goods and services which are relevant to the analysis of visitor consumption and, specifically, to tourism characteristic activities that produce such goods and services. | 27.00 € / / 35.67 US\$ |
| The Measurement of the Economic Impact on Tourism (CD-Rom) This Tourism Satellite Account (TSA) CD-ROM is the definitive source for all official documents from the Enzo Paci World Conference on the Measurement of the Economic Impact of Tourism held in June 1999 in Nice, France. The CD-ROM contains over 2000 pages | 27.00 € / / 35.67 US\$ |
| Measuring Visitor Expenditure for Inbound Tourism The purpose of this research was to examine various experiences relative to statistical operations used to estimate visitor expenditure associated with inbound tourism. | 33.00 € / / 43.59 US\$ |
| Enzo Paci papers on Measuring the Economic Significance of Tourism - Vol. 3 | 33.00 €/ / 43.59 US\$ |
| Enzo Paci Papers on Measuring the Economic Significance of Tourism Vol. 4 | 33.00 €/ / 43.59 US\$ |

The United Nations Economic and Social Commission for Asia and the Pacific (ESCAP) has done extensive work on tourism management, sustainable tourism, and tourism satellite accounts. Its reports are all available for free on the internet at <http://www.unescap.org/publications/subjects.asp> (click on “tourism” in the list of subjects). Although many of them are specifically pertinent to Asian and Pacific countries, a number of them are general methodological studies that may be of interest to Egyptians.

Transport and Tourism Division, UNESCAP, 1990. “Guidelines on Input-Output Analysis of Tourism” Reference No.: ST/ESCAP/836

Transport and Tourism Division, UNESCAP, 1991. “ESCAP Tourism Review No. 22: Managing Sustainable Tourism Development” Reference No.: ST/ESCAP/2141

Transport and Tourism Division, UNESCAP, 1999. “Guidelines on Integrated Planning for Sustainable Tourism Development” Reference No.: ST/ESCAP/2019

Transport and Tourism Division, UNESCAP, 2001 “Promotion of Investment in Tourism Infrastructure” Reference No.: ST/ESCAP/2133

Transport and Tourism Division, UNESCAP, 2003 “Poverty Alleviation through Sustainable Tourism Development” Reference No.: ST/ESCAP/2265