Travel and Tourism in Tunisia to 2017

Country on the post-revolution path to recovery and growth

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EXECUTIVE SUMMARY

Tourism is a major part of Tunisia’s economy, and the country relies heavily on tourism as a source of foreign currency for capital formation. As a result, the sector has received substantial government attention in the form of infrastructure development and pro-tourism regulation. The country has experienced a political shift caused by rising social and economic inequality during former President Ben Ali’s regime. A newly elected constituent assembly has been formed, although the focus on tourism is expected to remain unchanged. However, the protests, known as the Jasmine Revolution, caused a major decline in inbound tourism in 2011, and while tourism has rebounded, the country faces the risks of political instability and rising Islamic fundamentalism, which could hamper its image. Tourism in Tunisia also faces competition from other emerging mass-tourism destinations in South-east Asia, and from its neighbor Morocco. With Europe in the midst of a recession, Tunisia is also under pressure to search for new markets to fuel tourism growth in the coming years.

Domestic tourism is increasing

Domestic tourism increased slowly from XX.XX million trips in 2008 to XX.XX million in 2012, at a CAGR of XX.XX %. The slow growth can be attributed to the unrest prevailing in the country due to the Jasmine Revolution. Over the forecast period, domestic tourism is expected to increase, with the number of domestic trips set to record a CAGR of XX.XX %, compared to the XX.XX % CAGR recorded during the review period. The number of domestic trips is forecast to increase from XX.XX million in 2012 to XX.XX million in 2017. Trips taken for leisure purposes are estimated to increase the most, at a CAGR of XX.XX %, while trips for business purposes are set to rise at a CAGR of XX.XX % over the forecast period. As the hotel business suffered during and after the civil revolution, hoteliers cut prices and offered discounts to promote domestic tourism to compensate for the absence of international visitors.

Figure 1: Tunisia – Domestic Tourism Expenditure Market Dynamics (%), 2008–2017 and Number of Domestic Trips by Purpose (Thousand) with Number of Domestic Overnight Stay (Million), 2008–2012

Note: Bubble size represents the 2012 category size by value
Source: Timetric analysis
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2 INTRODUCTION

2.1 What is this Report About?

This report is the result of extensive research on the travel and tourism sector in Tunisia, covering its dynamics and competitive landscape. It provides insights on the market size and forecast for the travel and tourism sector. This report also provides an overview of the leading companies in the travel and tourism sector, along with details of strategic initiatives undertaken by them.

2.2 Definitions

For the purposes of this report, the following timeframes apply:

**Review period:** 2008–2012  
**Forecast period:** 2013–2017  
**Base year for forecasting:** 2012

All data is collected in local currency. To avoid distortions due to currency fluctuations, all conversions into US dollars, of current, historical and forecast data alike, are made with a yearly average exchange rate. All values in tables, with the exception of compound annual growth rates (CAGRs), are displayed to one decimal place. Growth rates may, therefore, appear inconsistent with absolute values due to this rounding method.

The key market categories featured in the report are defined below:

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism demand factors</td>
<td>Factors which influence the time and money spent on tourism. Typical tourism demand factors include the amount of holiday leave available to the average employee in the country, and mean household income.</td>
</tr>
<tr>
<td>Annual employee holiday entitlement</td>
<td>The number of days the average resident of a country will accrue annually through entitled holidays, including annual leave and public holidays. Public holidays are statutory holidays to which a country’s residents are entitled.</td>
</tr>
<tr>
<td>Domestic trip</td>
<td>A trip taken to a destination within the traveler’s country of residence.</td>
</tr>
<tr>
<td>Trips taken by season</td>
<td>The number of trips undertaken by the residents of a country (both domestic and international), segmented by four quarters: January–March, April–June, July–September and October–December.</td>
</tr>
<tr>
<td>Number of trips by residents</td>
<td>The number of trips undertaken by the residents of a country, segmented by domestic and international trips.</td>
</tr>
<tr>
<td>Average length of trip</td>
<td>The average number of nights spent by the residents of a country, segmented by domestic and international trips.</td>
</tr>
<tr>
<td>Number of overnight stays</td>
<td>The total number of nights spent by the residents of a country on all tourism trips during a given year.</td>
</tr>
<tr>
<td>International arrivals</td>
<td>The number of foreign nationals entering a country. For example, a person from Canada who visits France would be an international arrival to France.</td>
</tr>
<tr>
<td>Leisure trips</td>
<td>Trips for holidaying, recreation, or visits to friends and relatives</td>
</tr>
<tr>
<td>Business trips</td>
<td>Trips involving business as the primary purpose. It includes trips for meetings, incentives, conventions and exhibitions (MICE) purposes, events and conferences.</td>
</tr>
<tr>
<td>Other trips</td>
<td>Trips for purposes other than leisure or business, such as education, sports or pilgrimage.</td>
</tr>
<tr>
<td>International departures</td>
<td>The total number of citizens leaving their home country and arriving in other countries. This will be higher than the total number of citizens leaving their home country, as a traveler might travel in more than one country after leaving their home country.</td>
</tr>
<tr>
<td>Domestic tourist expenditure</td>
<td>Expenditure on tourism commodities during trips within national borders by citizens of the country. This spending is categorized into categories such as accommodation, sightseeing and entertainment, food service, retail (shopping), transportation, travel intermediation and others, which include travel insurance and equipment rental.</td>
</tr>
<tr>
<td>Accommodation</td>
<td>The total direct spending on accommodation by inbound, domestic and outbound tourists within a single economy.</td>
</tr>
</tbody>
</table>
INTRODUCTION

Table 1: Timetric Travel and Tourism Sector Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sightseeing and entertainment</td>
<td>the total direct spending on sightseeing and entertainment by inbound, domestic and outbound tourists within a single economy.</td>
</tr>
<tr>
<td>Foodservice</td>
<td>The total direct spending on food and beverages from foodservice outlets by inbound, domestic and outbound tourists within a single economy.</td>
</tr>
<tr>
<td>Retail</td>
<td>The total direct spending in retail outlets by inbound, domestic and outbound tourists within a single economy.</td>
</tr>
<tr>
<td>Transportation</td>
<td>The total direct spending on transportation by inbound, domestic and outbound tourists within a single economy.</td>
</tr>
<tr>
<td>Travel intermediation</td>
<td>The total direct spending via travel intermediaries by inbound, domestic and outbound tourists within a single economy.</td>
</tr>
<tr>
<td>Other categories</td>
<td>The total direct spending within all Other categories by inbound, domestic and outbound tourists within a single economy.</td>
</tr>
<tr>
<td>Inbound tourist expenditure</td>
<td>Expenditure on travel and tourism commodities by international visitors within a country. This spending is categorized by various categories such as accommodation, sightseeing and entertainment, food service, retail (shopping), transportation, travel intermediation and others which include travel insurance and equipment rental.</td>
</tr>
<tr>
<td>Outbound tourist expenditure</td>
<td>The total expenditure by the residents of a country for the purpose of and during international tourism trips, irrespective of whether these transactions involve domestic or international providers. This spending is categorized by various categories such as accommodation, sightseeing and entertainment, food service, retail (shopping), transportation, travel intermediation and others which include travel insurance and equipment rental.</td>
</tr>
<tr>
<td>Total national tourism expenditure</td>
<td>The total spending by residents on both domestic and outbound trips within categories such as accommodation and transportation.</td>
</tr>
<tr>
<td>Average national tourism spend per day of trip</td>
<td>The average daily expenditure of a country’s residents during domestic trips.</td>
</tr>
<tr>
<td>Domestic</td>
<td>The average daily expenditure of a country’s residents during international trips.</td>
</tr>
<tr>
<td>Percentage of total resident income spent on</td>
<td>The percentage of total annual income that a country’s residents spend on travel and tourism activities.</td>
</tr>
<tr>
<td>tourism</td>
<td>The average expenditure on travel and tourism activities by an international tourist within a country. This spending is categorized by various categories such as accommodation, sightseeing and entertainment, food service, retail (shopping), transportation, travel intermediation and others which include travel insurance and equipment rental.</td>
</tr>
<tr>
<td>Average expenditure per international tourist</td>
<td>The average expenditure on domestic travel and tourism activities by residents of a country, segmented by categories such as accommodation and foodservice.</td>
</tr>
<tr>
<td>Average expenditure per domestic trip</td>
<td>The average expenditure on travel and tourism activities by outbound tourists of a country, segmented by categories such as accommodation and foodservice.</td>
</tr>
<tr>
<td>Average overseas tourism expenditure</td>
<td>Expenditure on all modes of transport within a country by domestic, outbound and inbound tourists.</td>
</tr>
<tr>
<td>Total national tourism expenditure on transportation</td>
<td>The total spending by residents on transportation in domestic trips.</td>
</tr>
<tr>
<td>Number of seats available</td>
<td>The number of seats available for purchase on all the airlines operating in a country, i.e. both national and foreign carriers operating on domestic and international routes.</td>
</tr>
<tr>
<td>Number of seats sold</td>
<td>The number of seats sold to revenue passengers by all the airlines operating in a country in one year. This does not include crew members.</td>
</tr>
<tr>
<td>Passenger kilometers available</td>
<td>A measure of passenger carrying capacity. Passenger kilometers available, or available seat kilometers, is calculated by multiplying seats available by distance traveled by an aircraft. The total available passenger kilometers will be the sum product of seats and kilometers traveled by all individual aircraft operating in a country in one year.</td>
</tr>
<tr>
<td>Revenue-generating passenger kilometers</td>
<td>A measure of the volume of passengers carried by airlines operating in a country. It is the total number of kilometers traveled by all revenue passengers in one year. A revenue passenger is a passenger who pays commercial remuneration to airlines for transportation. A revenue passenger kilometer is counted when a revenue passenger is carried one kilometer.</td>
</tr>
<tr>
<td>Hotels</td>
<td>Establishments that provide paid lodging and full guest services, typically with a continuous staff presence. In the case of motels, this includes off-street parking facilities but not necessarily meal services.</td>
</tr>
<tr>
<td>Number of rooms</td>
<td>The total number of rooms available in all hotel accommodation establishments in a country in one year.</td>
</tr>
<tr>
<td>Room occupancy rate</td>
<td>The percentage of available rooms sold during a given period.</td>
</tr>
</tbody>
</table>
| Revenue per available room                     | A measure of financial performance in the hospitality industry. It is the ratio of total room revenue to total rooms available. Average room rates and occupancy can also be used to calculate revenue per available room.
## Table 1: Timetric Travel and Tourism Sector Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total room revenue</td>
<td>The room rent that a guest pays for the occupied room.</td>
</tr>
<tr>
<td>Total non-room revenue</td>
<td>Revenue earned by hotels other than the room rent. It includes revenue from food and beverages, telecommunications, health and leisure operations, and car rentals.</td>
</tr>
<tr>
<td>Number of guests</td>
<td>Guest numbers in all hotel accommodation establishments in a country in one year.</td>
</tr>
<tr>
<td>Business guests</td>
<td>The annual number of guests arriving in hotel accommodation establishments for business purposes.</td>
</tr>
<tr>
<td>Leisure guests</td>
<td>The annual number of guests arriving in hotel accommodation establishments for leisure purposes.</td>
</tr>
<tr>
<td>Car rental</td>
<td>Car rental is the hiring of a motor vehicle from one party to another.</td>
</tr>
<tr>
<td>Business rentals</td>
<td>Annual revenue generated through car rentals under negotiated contractual agreements between businesses and a rental company.</td>
</tr>
<tr>
<td>Leisure rentals</td>
<td>Annual revenue generated through car rentals directly to customers.</td>
</tr>
<tr>
<td>Airport rentals</td>
<td>Annual car rental revenue generated through rentals from an airport.</td>
</tr>
<tr>
<td>Non-airport rentals</td>
<td>Annual car rental revenue generated through rentals at locations other than airports.</td>
</tr>
<tr>
<td>Insurance replacement</td>
<td>the revenue generated by car rental firms through customers hiring vehicles through insurance and leasing companies, repair shops or dealerships with which car rental companies have a contractual relationship.</td>
</tr>
<tr>
<td>Fleet size</td>
<td>the number of vehicles available for rent in one year</td>
</tr>
<tr>
<td>Number of rental occasions</td>
<td>The number of times rental cars are rented out.</td>
</tr>
<tr>
<td>Rental days</td>
<td>The total number of days all cars in the fleet are rented. It is calculated by multiplying the total fleet size by the average number of days per year during which a car is rented.</td>
</tr>
<tr>
<td>Average rental length</td>
<td>The average duration of a car rental.</td>
</tr>
<tr>
<td>Utilization rate</td>
<td>The ratio of the number of rental days to total number of days for which cars could be actually rented during the year.</td>
</tr>
<tr>
<td>Average revenue per day</td>
<td>The ratio of car rental revenue to the total number of rental days in one year.</td>
</tr>
<tr>
<td>Travel intermediaries</td>
<td>Part of a business that assists in selling travel products and services to customers. The products may include airline tickets, car rentals, hotels, railway tickets and package holidays that may combine several products.</td>
</tr>
<tr>
<td>Accommodation only</td>
<td>Total revenue generated by intermediaries exclusively through accommodation bookings.</td>
</tr>
<tr>
<td>Travel only</td>
<td>Total revenue generated by intermediaries exclusively through travel bookings.</td>
</tr>
<tr>
<td>Car rental only</td>
<td>Total revenue generated by intermediaries exclusively through car rental bookings.</td>
</tr>
<tr>
<td>Tourism packages</td>
<td>A combination of tourism products or services, such as accommodation, travel bookings, car rental etc., bundled together by a tour operator.</td>
</tr>
<tr>
<td>Experiential travel</td>
<td>Travel packages offering a holistic experience for travelers who want to go beyond the beaten tourist paths and learn about cultural and social aspects of a country or a place.</td>
</tr>
<tr>
<td>Other products</td>
<td>Revenue generated by travel intermediaries from travel products and services that are not classified above.</td>
</tr>
<tr>
<td>Domestic trips</td>
<td>Revenue generated by travel intermediaries selling travel-related products or services for travel within national boundaries.</td>
</tr>
<tr>
<td>International trips</td>
<td>Revenue generated by travel intermediaries by selling travel-related products or services for travel outside national boundaries.</td>
</tr>
<tr>
<td>Online</td>
<td>Revenue generated by travel intermediaries by selling travel-related products or services over the internet.</td>
</tr>
<tr>
<td>In-store</td>
<td>Revenue generated by travel intermediaries by selling related products or services to a customer over the counter.</td>
</tr>
</tbody>
</table>

Source: Timetric analysis  
© Timetric
2.3 Methodology

All travel and tourism reports are created by following a comprehensive, four-stage methodology. This includes market study, research, analysis and quality control.

1) Market Study

A. Standardization
Definitions are specified using recognized industry classifications. the same definition is used for every country.
Annual average currency exchange rates are used for the latest completed year. these are then applied across both the historical and forecast data to remove exchange rate fluctuations.

B. Internal audit
Review of in-house databases to gather existing data:
- Historic market databases and reports
- Company database

C. Trend monitoring
- Review of the latest travel and tourism companies and industry trends

2) Research

A. Sources
- Collection of the latest market-specific data from a wide variety of industry sources:
  - Government statistics
  - Industry associations
  - Company filings
  - International organizations
  - Travel and tourism agencies

B. Expert opinion
- Collation of opinion taken from leading travel and tourism sector experts
- Analysis of third-party opinion and forecasts:
  - Broker reports
  - Media
  - Official government sources

C. Data consolidation and verification
- Consolidation of data and opinion to create historical datasets
- Creation of models to benchmark data across categories and geographies
3) Analysis

A. Market forecasts
   ● Feeding forecast data into market models:
     ○ Macroeconomic indicators
     ○ Industry-specific drivers
   ● Analysis of travel and tourism sector database to identify trends:
     ○ Latest travel and tourism trends
     ○ Key drivers of the travel and tourism sector

B. Report writing
   ● Analysis of market data
   ● Discussion of company and industry trends and issues
   ● Review of financial deals and travel and tourism trends

4) Quality Control

A. Templates
   ● Detailed process manuals
   ● Standardized report templates and accompanying style guides
   ● Complex forecasting tool used to ensure forecast methodologies are consistently applied
   ● Quality control checklists

B. Quality control process
   ● Peer review
   ● Senior-level QC
   ● Random spot checks on data integrity
   ● Benchmark checks across databases
   ● Market data cross-checked for consistency with accumulated data from:
     ○ Company filings
     ○ Government sources
MARKET OVERVIEW

3 MARKET OVERVIEW

3.1 Macroeconomic Background

Tunisia witnessed a major political upheaval in 2011 with the Jasmine revolution, which resulted in the ousting of President Ben Ali and the election of the Constituent Assembly. The impact of the political transition was reflected in the drastic movement of the country's key macroeconomic indicators.

Owing to the political unrest witnessed in 2011, economic activity declined in 2011 with real GDP contracting by XX.XX% as tourism and other sectors declined. However, since then the economy has recovered as the country posted a year-on-year XX.XX% rise in GDP in the third quarter of 2012, compared to a 1.1% fall the third quarter of 2011 as agriculture, tourism and air transport recovered.

Unemployment reached XX.XX% in 2011 due to the economic downturn and the return of workers from Libya, but fell to XX.XX% in the fourth quarter of 2012. However, high youth unemployment, which hovers at around XX.XX%, remains a structural problem for the country.

Inflation accelerated to XX.XX% in 2012 from XX.XX% in 2011, owing to a rise in demand for food from Libya and supply bottlenecks, and a liquidity injection for banks.
3.2 Economic Impact

Tourism is a major sector in Tunisia, accounting for XX.XX% of its GDP in 2011, according to the World Travel & Tourism Council (WTTC). The sector also contributed XX.XX% to the overall employment in the country and received TNDXX.XX billion in investments in 2011.
MARKET OVERVIEW

3.3 Trends and Issues

3.3.1 Key trends

3.3.2 Barriers to tourism

3.3.3 Tourist attractions

Typical weather pattern

Landscape

Cultural events
MARKET OVERVIEW

Sporting events

Business attractions

Accessibility

Air transport infrastructure

Road transport infrastructure
MARKET OVERVIEW

Rail transport infrastructure

Marine transport infrastructure
3.4 Tourism SWOT

3.4.1 Overview of the tourism sector in Tunisia

Due to its location and environmental diversity, Tunisia has all the required elements of a successful tourism destination: diverse and picturesque landscapes, interesting culture, and affordable prices. Travel and tourism is an important component of the Tunisian economy, contributing XX.XX% of the country’s GDP in 2012. Of the direct travel and tourism contribution to GDP, the share of leisure travel spending was XX.XX% in 2011, according to WTTC.
MARKET OVERVIEW

3.4.2 Strengths

3.4.3 Weaknesses

3.4.4 Opportunities

3.4.5 Threats
4 TOURISM ECONOMICS IN TUNISIA

4.1 Economics Analysis

4.1.1 Value of tourism

4.1.2 Tourism balance of payments

4.1.3 Growth drivers
5 DOMESTIC TOURISM

Figure 3: Tunisia – Number of Trips by Residents (Millions), 2008–2017

Source: Timetric analysis © Timetric

Figure 4: Tunisia – Number of trips by Purpose of visit (Million) and Number of Overnight Stays (Millions), 2008–2017

Source: Timetric analysis © Timetric

Figure 5: Tunisia – Average Length of Tourism (No. of Nights Spent), 2008–2017 and Total Domestic Tourism Expenditure by Category (TND Million), 2008–2017

Source: Timetric analysis © Timetric

Figure 6: Tunisia – Domestic Tourism Expenditure by Category (%), 2012 and 2017

Source: Timetric analysis © Timetric
DOMESTIC TOURISM

5.1 Key Trends and Issues

5.1.1 Key trends

5.1.2 Barriers to tourism

5.1.3 Tourist attractions
5.2 Domestic Tourism Flows

5.2.1 Number of trips and overnight stays

Table 2: Tunisian Domestic Tourism – Number of Trips by Type (Million), 2008–2017

<table>
<thead>
<tr>
<th>Year</th>
<th>Business</th>
<th>Leisure</th>
<th>Other Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td></td>
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<tr>
<td>2009</td>
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<tr>
<td>2017</td>
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</tbody>
</table>

Source: Timetric analysis

Figure 7: Tunisian Domestic Tourism – Number of Trips by Type (Million), and Number of Overnight Stays (Million), 2008–2017

Table 3: Tunisian Domestic Tourism – Overnight Stays (Million), 2008–2017

<table>
<thead>
<tr>
<th>Year</th>
<th>Overnight Stays</th>
</tr>
</thead>
<tbody>
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<td>2016</td>
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<td>2017</td>
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</tbody>
</table>

Source: Timetric analysis